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What's New

Bronto releases new content weekly. Find out what we've released lately.

What's New is updated every Thursday with what was released the current week and contains every new feature and product change since January 2015. Each release note includes a link to its help, so you can read more information about any feature you're interested in.

The week of 06/18/2018 Bronto:

- Released a new video: Add Contacts With Direct Add.
- Updated the Create Workflows video.
- Added a new Get Started Checklist.

The week of 06/11/2018 Bronto:

- Updated the list of Oracle Bronto Affiliates and Subcontractors that can process personal data.

The week of 06/04/2018 Bronto:

- Sunset Instagram Shopping in Socialite. Socialite will continue to support Facebook Audiences and Facebook tabs.
- Added content security policies to the knowledge base.

May 2018

All of the new features that were released in May 2018.

The week of 05/7/2018 Bronto:

- New topic added for date formatting in Recommendations Web.
- New topic added for how to strategically use workflows in a Cart Recovery campaign.

The week of 05/14/2018 Bronto:

- New overview added for how Bronto records consent. To be compliant with GDPR, Bronto now records contact status changes and updates to email addresses.
- Consent information is now recorded any time contacts are imported into Bronto. You can also refresh consent for existing contacts.
- DirectAdd and DirectUnsubscribe now support an optional comment parameter that can be used to provide more information about your contact source in consent reports.
- You can now export consent records for an individual contact from the contact detail page and for an entire site. Learn more about consent report metrics.
- The Bronto API now includes the method readContactsWithLatestUnsubscribeDate that returns the contact unsubscribe date in addition to the results returned with readContacts.
- The Bronto API also now lets you add or update consent log entries using addContacts, updateContacts, and addOrUpdateContacts.
- Administrators can now give Bronto users permission to export contact records.
- Published the webinar Introducing Recommendations Web that explains the features and benefits of Recommendations Web,

The week of 05/21/2018 Bronto:

- Clarified that messages triggered by the Lookup Contact Webform must be approved as transactional.
- Country code is now required for user phone numbers.
- Added new topic for New Reports' Detailed Contact Report Export.
- New video on how to use cart tags in a message.
What's New

The week of 05/28/2018 Bronto:

• Added support for a new field, Relative Product URL, in Recommendations Web layouts.
• Added a new Transactional Email FAQ to help you understand whether an email can be classified as transactional, relationship, or commercial.

April 2018

All of the new features that were released in April 2018.

The week of 04/02/2018 Bronto:

• Added new Shopify transactional message tags.

The week of 04/09/2018 Bronto:

• Bronto now supports 4 different transactional messages for NetSuite. You must have NetSuite SuiteCommerce Advanced, SiteBuilder, or SuiteCommerce Standard to use transactional messages.

The week of 04/16/2018 Bronto:

• Released Recommendations Web Recommendations Web allows you to easily and quickly add dynamic, personalized product recommendations anywhere on your website.

The week of 04/23/2018 Bronto:

• Bronto now supports two additional fields available for mapping with Data Loader: IP Address and Consent Date.
• Bronto now includes additional fields in contact reports: Custom Source, Last Unsubscribe Date.
• Released a new Pop-Up Manager preferences section where you can add and configure an opt-in checkbox for marketing messages.
• Added a new optional Required Checkbox field for Webforms.

The week of 04/30/2018 Bronto:

• Added new topic on how to Configure Recommendations Web for a Single Page App
• Bronto now expires cart data, including line-item information, after 90 days.
• Published a new webinar A Fresh Look At Driving Revenue.
• Removed the firewall from the customer knowledge base. You can now access Bronto help without logging into Bronto.

March 2018

All of the new features that were released in March 2018.

The week of 03/05/2018 Bronto:

• Renamed the Links tab in New Reports to Heat Map.
• Released a Settings Checklist that contains a collection of interactive guides and videos you can use to update your account settings.

The week of 03/19/2018 Bronto:

• Published the webinar Rescue Revenue With Cart Recovery that explains how you can use Bronto's Cart Recovery app to recapture lost shopping cart revenue.
• Added an overview of the new letter spacing design option in the Email Message Editor that lets you change the space between letters for text and buttons.
• Published instructions on how to use the Workflow Clean Up tool to better organize your workflow nodes.
• Added details on what exclusions you may see in a Browse Recovery Exclusions Report.
• Updated the guide on how to use Bronto's Demandware Connector.

On March 16, 2018, the Bronto Connector for Magento 2 was revised to version 3.6.0. The release includes a change to our attribution model and PHP revision in support of Magento Commerce Cloud.

February 2018

All of the new features that were released in February 2018.

The week of 02/05/2018 Bronto:
• Published a new video to learn how to connect your Bronto account to Twitter and Facebook.
• Updated the Data Retention Policy for New Reports. Hourly-level data is available for 2 weeks after a delivery is sent. For messages, lists, and segments, you can query the hourly-level data for the most recent 2 weeks.

The week of 02/12/2018 Bronto:
• Added a new column on the Orders page grid called Conversion Email. It tells you what email a contact clicked on before they placed an order. This column is hidden by default but can be viewed by opening the Choose Visible Columns window and selecting Conversion Email.

The week of 02/19/2018 Bronto:
• Released the ability to archive segments.
• Published a new webinar: Gmail Inbox Delivery and Domain Reputation: What You Need to Know Now
• Added a new topic on using dynamic content inside of cart tags.
• Added a new topic on using cart tags inside of product tags.

The week of 02/26/2018 Bronto:
• You can now schedule exports for New Reports. For more information on how to schedule a report export, see Schedule Report Exports.

January 2018

All of the new features that were released in January 2018.

The week of 01/08/2018 Bronto:
• Dynamic Content in the Email Message Editor is now easier to use! You can now see which containers have dynamic content by looking for the lightning bolt next to the container. You can also easily change between rule views with the Active Dynamic Rule list.

The week of 01/22/2018 Bronto:
• Summary data widgets have been added to the Product Overview page. If you have order or browse data, you will now see 1 or 2 widgets on the Product Overview page. The widgets show you a summary of the actual and trending data for page views and product orders.

The week of 01/29/2018 Bronto:
• Deep linking is now available through Branch. With Branch deep linking you can convert normal links in your email to deep links. Customers who click a deep link in the email from a mobile device are directed to a specific page in your mobile app or to the app store if the app is not installed.
• A new option has been added to capture email browse data. There is now an option to only capture email browse data when a contact clicks a button. For more information, see step 10 of the Capture Browse Data help topic.
2017

December 2017

All of the new features that were released in December 2017.

The week of 12/4/2017 Bronto:

On December 4, 2017 we released version 3.5.0 of the Magento 2 Connector, which provides support for PHP7 Magento sites, including Magento Commerce Cloud.

The week of 12/11/2017

• Summary Reports Exports is now available for New Reports!

On December 13, 2017, Bronto released version 3.5.1 of the Connector for Magento 2. This release contained bug fixes related to:

1. The circumstance when an M2 connector is configured with multiple website scopes. The product URLs for Carts have been corrected to direct the user to the expected product details page.
2. An error with new product imports.

November 2017

All of the new features that were released in November 2017.

The week of 11/6/2017 Bronto:

• For Product Views and Visitor Views in the Browse Recovery app, Unknown Email Address has been renamed to New Email Address.
• Bronto now supports 4 different transactional messages for Shopify. You must have Shopify Plus to use transactional messages.

October 2017

All of the new features that were released in October 2017.

The week of 10/2/2017 Bronto:

• Updates to the Browse Recovery Dashboard include:
  • A more detailed view of the Product Views report. Now product views metrics are broken into 4 groups: No Email Address, Unknown Email Address, Marketable Contact, and Unmarketable Contact.
  • A new Visitor Views report, which shows the number of unique contacts to the product pages within the month. They are broken into 3 groups: Unknown Email Address, Marketable Contact, and Unmarketable Contact.
• Published a new webinar Ask the Experts... about Recommendations Premium.

The week of 10/9/2017 Bronto:

• A reset button has been added to containers and some elements in the Email Message Editor. The reset button reverts changes back to the state when the container or element was opened.

On October 11, 2017, the Bronto Connector for Magento 2 was revised to version 3.4.0. This release includes support for custom admin URLs.

We encourage all Magento 2 customers to update to the latest version.

The week of 10/16/2017 Bronto:

• Published a new webinar Ask the Experts... about Recommendations Premium: Getting the Most From Your Product Catalog.

The week of 10/23/2017 Bronto:
• New Reports is out of Bronto Labs! All customers that have Order Service will now have New Reports. Not sure if you have Order Service? Check out this guide to find out.
• Campaigns is out of Bronto Labs! It is available to all customers that have Order Service. Want to use Campaigns? Go to Messages > Campaigns. Watch this video to learn more about how to create and assign campaigns.
• Added REST API calls for Campaigns.
• Released Magento 1 Extension version 2.5. This release fixes issues with email delivery times and issues with the display of recently-viewed products in email messages. It also includes changes to align with MEQP program and Marketplace listing.

September 2017
All of the new features that were released in September 2017.

The week of 9/4/2017 Bronto:
• Replaced the online help system with a new customer knowledge base. You can read more about the reasons for this change in the Bronto blog.

On September 7, 2017, the Bronto Connector for Magento 2 was revised to version 3.3.0. This release fixes bugs and allows for M2 certification. It also addresses customer-reported bug fixes related to registration objects.

We encourage all Magento 2 customers to update to the latest version.

The week of 9/11/2017 Bronto:
• Bronto has partnered with a 3rd-party Natural Language Processing technology called Persado and is offering the Predict product as a standard part of the Bronto Marketing Platform. You can use Persado Predict to analyze your subject lines and determine what subject lines will perform the best.

The week of 9/18/2017 Bronto:
• Removed the ability to search for archived products in the Product Search.

On September 18, 2017, the Bronto Connector for Magento 2 was revised to version 3.3.1. It addresses several customer-reported bug fixes related to parent product ID values.

We encourage all Magento 2 customers to update to the latest version.

August 2017
All of the new features that were released in August 2017.

The week of 8/14/2017 Bronto:
• Added a new Delivery Recipients tab to the New Reports labs delivery reports.
• Added a Contact Status column to the Orders grid.
• In the browse settings, added the ability to specify the domain you want to capture browse data for.

The week of 8/21/2017 Bronto:
• Added a new Advanced Styling for Browse Recovery Messages topic.

On August 23, 2017, the Bronto Connector for Magento 2 was revised to version 3.2.0. This release includes support for including VAT (an international tax) on line items to be used in Cart Recovery. It also addresses several customer-reported bug fixes related to order imports.

We encourage all Magento 2 customers to update to the latest version.

July 2017
All of the new features that were released in July 2017.

The week of 7/10/2017 Bronto:
• Added the ability to enable cart and order cookie tracking when your site has a two-part, top-level domain. For example, bronto.co.uk is a two-part domain.
The week of 7/17/2017 Bronto:

- Reference products for **Recently Ordered Products** in **Recommendations Premium** now bases its recommendations on the latest 10 products purchased, instead of just the last 5 products.
- Added a new topic: **Send Different Versions Of An Email**.

The week of 7/24/2017 Bronto:

- Added the ability to set the Max Mobile Height of a pop-up. The mobile version of the pop-up will display unless the screen size is larger than both the set Max Mobile Width and Max Mobile Height.
- Added more customization options to the dynamic ribbon. You can choose the position of the ribbon and the Close link. You can also preview changes and discard changes.

The week of 7/31/2017 Bronto:

- In the **Global Settings** for **Recommendations**, the **Random** option for **Select Default Recommendation** has been removed and replaced with **Bronto Predefined Default**.

  If you were using the **Random** option, it will now be **Bronto Predefined Default**. It will behave the same way as Random, but you can edit **Bronto Predefined Default** to add more criteria. If you were using a different default recommendation, that will not change, but you will now have the **Bronto Predefined Default** option.

- In **Product Field Descriptions**, **Product Type** has been renamed to be **Product Type Multi**.
- Added a new topic: **Configure Browse Recovery Test Send Emails**. You can now send test emails for Browse Recovery without having to change or deactivate and active message on a rule.
- For **Recommendations Standard** and **Recommendations Premium**, the **Apply Randomness** function has been moved from the **General Settings** tab to the **Priorities** tab. There are now 3 options for Apply Randomness, instead of a toggle switch. The options are **Do Not Use**, **Randomize Best Results**, and **Randomize All Results**.
- Added the ability to switch Data Loader automatic imports between **Daily** and **Hourly** scans.
- Added information on how to **Adjust Google Analytics Settings** to set Bronto’s contact_eid as excluded query parameter. This will prevent Google from reporting URLs that contain a contact_eid as unique URLs.

**June 2017**

All of the new features that were released in June 2017.

The week of 6/06/2017 Bronto:

- Added a limit to the number of Premium Recommendations rec loops that a customer can see in a message. You can still add an unlimited number of Premium Recommendations to a message, but a customer will only see results for the first 3 Rec Loops (that have results). There is no limit for Standard Recommendations.

The week of 6/13/2017 Bronto:

- Added the ability to **remove a message from a Campaign**.
- Updated rec loop functionality so you can set a rec loop to be excluded from a message if it does not return any results. See step 3 f for more information.
- Added a new **Product Type** field to the list of Product fields.

The week of 6/20/2017 Bronto:

- Added a new **Email Performance Report** to New Reports Bronto Labs. The report includes metrics for all email deliveries that have been sent since New Reports was enabled in your account.
- Removed Automators from the platform. Automators were a Bronto legacy feature that have been completely replaced by workflows.
- Renamed the **Reporting** menu to **Reports**.
- Renamed the Reporting Dashboard to the **Legacy Reporting Dashboard** and moved it to the end of the Reports menu.

The week of 6/26/2017 Bronto:

- Released the webinar **State of Email and Ecommerce**.
• Added a new Workflow Nodes Overview "cheat sheet" that defines all of the workflow nodes in one place and provides examples of how you could use each node.

May 2017
All of the new features that were released in May 2017.

The week of 5/01/2017 Bronto:
• Added the ability to use field tags, special tags, or content tags in the Reply-To Address.

The week of 5/08/2017 Bronto:
• Added the ability to see a delivery's campaign association of New Report Delivery Reports.
• Added the ability to use subscripts and superscripts in a text element in email message editor
• Added different bullet types to bulleted and numbered lists in the email message editor.
• Added the AOV metric to the New Report Split Groups Metrics.

The week of 5/15/2017 Bronto:
• Added the ability to use RFM metrics to make content dynamic in the email message editor.
• Updated Browse to use Bronto's contact EID (external ID) instead of email address. If you currently use Browse or Custom Analytics to pass contact data to Bronto using an email address in an URL, you should switch to using EID instead of email.

April 2017
All of the new features that were released in April 2017.

The week of 4/03/2017 Bronto:
• Added a new Remove From SMS Keyword action node that can be used to remove contacts from an SMS keyword using a workflow that starts with the Initial Incoming SMS With Keyword trigger node.
• Added Next Month, Next Quarter, Next Week (S-S), Next Week (M-F), and Next Year as options in various date-based segment criteria.
• Released a method of collecting order data using a JavaScript object that you embed on your site. You can use this to implement Order Service for your site or to migrate from Advanced Conversions to Order Service.

The week of 4/10/2017 Bronto:
• Changed how Data Loader report logs work. Previously every error in an import (that occurred within the last 30 days) was listed in the report logs. This means if every record in an import had the same error, the error was included for every record. Sometimes this could mean a single error would result in hundreds of log entries. In an effort to make Data Loader logs easier to read, each unique type of information is now only listed once in the Data Loader run log. A new Error Count field was added to the run log table so you can easily see how many times this error occurred in the import. And you can still see each error individually by downloading the full run log file.

The week of 4/17/2017 Bronto:
• Added Request Time Criteria to Recommendations. Request Time Criteria lets you reuse a recommendation for multiple purposes by providing a single, dynamic field that can be modified at the message level. For more information about how to add it to a recommendation, see step 14. For more information about how to use it in a message see Recommendation Messages.

The week of 4/24/2017 Bronto:
• Released Campaigns to Bronto Labs. Campaigns is a new feature that provides simple campaign organization, tracking, and management within Bronto.

March 2017
All of the new features that were released in March 2017.

The week of 3/06/2017 Bronto:
• Added a new Date filter node that can be used to filter contacts in a workflow based on the current date's relationship to the date set in the node.

The week of 3/13/2017 Bronto:
• Released New Reports to Bronto Labs. Want to use New Reports? Go to Home > Settings > Bronto Labs to learn how to enable it for your account.

The week of 3/20/2017 Bronto:
• Released Recommendations Standard. For more information about this release see the Bronto blog post Recommendations Standard Available to All Bronto Customers.
• Added currency filtering to New Reports labs.
• Added the ability to set padding to the Rec Loop element.

The week of 3/27/2017 Bronto:
• Released List Reports to New Reports in Bronto Labs.
• Added Last Delivery Date, Last Open Date, and Last Click Date to the list of default contact fields in the Contact Field Comparison Filter Node.

February 2017
All of the new features that were released in February 2017.

The week of 2/06/2017 Bronto:
• Updated the Orders page search functionality so that you can search for all orders within a date range without needing to provide additional order details.
• Added the ability to browse to your hosting page to link to multimedia content when creating an MMS message.

The week of 2/13/2017 Bronto:
• Released the Recommendations Premium app. Want to know what Recommendations Premium can do for you? Check out our blog post.
• Added browse configuration settings that can be used by Recommendations Premium and Browse Recovery app users to capture your site's browse data. Previously these settings were located within the Browse Recovery app but were moved to allow them to work with multiple apps.
• Added the ability to copy a message from the Message Overview page.
• Updated the Help link in Bronto to open a context sensitive Learning Center panel.

The week of 2/27/2017 Bronto:
• Published the webinar Recommendations Premium:Suggest Your Shopper's Next Purchase.

This isn't new, but did you know that when you delete a message its stored in a trash can for 30 days before its permanently deleted? If a message is accidentally deleted, or you just want it back for any reason, you can restore it from the trash can.

January 2017
All of the new features that were released in January 2017.

The week of 1/09/2017 Bronto:
• Added a new dynamic ribbon feature to Pop-up Manager. The dynamic ribbon allows Pop-up Manager users to create and display a call to action page banner that can be used to provide a less intrusive pop-up experience. This is particularly helpful on mobile devices and should keep you compliant with Google's new mobile pop-up SEO standards.
• Added the ability to use an SMS keyword auto subscription settings on the Manage Preferences webform.
• Updated our data retention policy to include information about browse data retention.

The week of 1/16/2017 Bronto:
What's New

• Added `%message_name%` to the list of available special tags. This tag allows you to include a message name in an email.

The week of 1/30/2017 Bronto:

• Added the ability to link to any content you've uploaded to Bronto hosting when you insert a link in messages designed using the email message editor. Simply click the folder icon in the Link Url box.
• Added two new webinars: Top Strategies for Enhancing Key Lifecycle Messages and Effectively Using the Email Message Editor.

2016

December 2016

All of the new features that were released in December 2016.

The week of 12/12/2016 Bronto:

• Added the ability to copy and paste workflow nodes within a workflow. When you copy a workflow node all of its current settings are retained.
• Added a new `addOrUpdateContactsIncremental` SOAP API function. `addOrUpdateContactsIncremental` works like `addOrUpdateContacts` with the exception that it does not change existing list membership details for contacts unless these changes are explicitly included in the call. While `addOrUpdateContacts` updates an existing contact's list membership to exactly match what is in the API call, `addOrUpdateContactsIncremental` will not remove the contact from any lists they are already on unless you pass this change using the call.

November 2016

This release is the last new feature release in November 2016. In the time leading up to Black Friday and Cyber Monday Bronto has been working on back end systems to ensure a successful marketing holiday.

The week of 11/03/2016 Bronto:

• Added a new Element Background Color design option to buttons in the email message editor. This allows you to set the color of the container box behind a button
• Published a new webinar that explores different trends digital retailers and marketers are using in email today.

October 2016

All of the new features that were released in October 2016.

The week of 10/03/2016 Bronto:

• Updated Shopify Connector's product import settings to support greater flexibility in what data is imported and used for a product's title. You may need to sync your Shopify Connector before you will see the new product import settings.

The week of 10/10/2016 Bronto:

• Published Demandware Connector help.

September 2016

All of the new features that were released in September 2016.

The week of 9/5/2016 Bronto:

• Disabled the ability to use JavaScript in email design. Bronto has always recommended you avoid JavaScript in message design because it is disabled by most email clients as a security precaution. Now we check emails for `<script>` tags and a message cannot be saved if new JavaScript code is detected. This helps protect the Bronto domain from being considered malicious by email clients.
• Published help topics on how to configure the Magento Connector.

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The week of 9/12/2016 Bronto:

• Added the ability to add labels to lists.
• Added the link title attribute for links in the email message editor.
• Added the ability to adjust the width of drag-and-drop content tags.

August 2016

All of the new features that were released in August 2016.

The week of 8/1/2016 Bronto:

• Published help topics on how to configure the NetSuite Connector.
• Added custom date format strings support and the ability to apply simple math operations to a date in system tags. For more information see the Format Date Tags column of this help topic.
• Added field is greater than or equal to and field is less than or equal to operators to dynamic code.

The week of 8/8/2016 Bronto:

• Added the ability to set a limit to the maximum number of items that will be included in a cart loop.

The week of 8/15/2016 Bronto:

• Added the ability to color code segment labels.
• Improved the design and organization of the Recommendations app by updating recommendation creation design.

The week of 8/22/2016 Bronto:

• Improved the usability of the email message editor. For more information about these changes see the Message Editor’s Fantastic New Features blog post. All of the help topics related to the email message editor have also been updated to reflect these changes.
• Added new commerce fields to product data. These fields are automatically generated and populated with revenue and sales data for each product and can be used to both view sales trends and build Recommendations recommendations.

The week of 8/29/2016 Bronto:

• Added the ability to upload files that contain custom fonts.
• Updated the audit log to include date and time filtering.
• Added the ability to map product placeholders when designing an SMS or MMS message. For more information see step 9.
• Configured the platform to disable the Product page data import options when a connector is used to import product data. This prevents your product catalog from storing inaccurate information due to product data coming from more than one source.
• Published a new webinar titled Crafting Emails Your Subscribers Will LOVE.

July 2016

All of the new features that were released in July 2016.

The week of 7/4/2016 Bronto:

• Updated how the Order Is Shipped trigger node works. Now the node will only trigger a workflow the first time an order's state changes to shipped.
• Now imports transactional contacts with the Browse Recovery app when a customer with an email address not in Bronto browses your site.

The week of 7/11/2016 Bronto:

• Add the ability to map product or Recommendations tag placeholders from the Send Email action node. Any messages sent by this node in the workflow will use the product mappings indicated in the node.
• Simplified the order import options in Data Loader by consolidating all order imports to a single Add or Update Orders option.
• Published help on how to set up and configure the Shopify Connector.

The week of 7/18/2016 Bronto:
• Released a new Line Item Comparison filter node that customers who use order service can use to send contacts down different workflow paths based on the value of one or more of the items in a cart or order.

The week of 7/25/2016 Bronto:
• Added the ability to select AM or PM when scheduling messages in order to clarify the scheduling process.
• Added the ability to move entire messages folders and their contents

June 2016
All of the new features that were released in June 2016.

The week of 6/6/2016 Bronto:
• Added the ability to set default product mappings in the WYSIWYG editor.
• Added the ability to download contact import reports from the Report Downloads page.
• Updated the Set Delivery Specific Products option for messages that use Recommendations recommendations. Now when you map Recommendations placeholders as you schedule a message, the Order box is automatically populated with the next available number for the recommendation you selected from the list. You can change this default as necessary.
• Added the ability to view a workflow that triggered a contact-related event. Simply click on the word workflow in the Note/Method column on the Contact Details History page.

The week of 6/13/2016 Bronto:
• Updated the priority settings for Recommendations (see step 13) in order to clarify how priority rankings work in the app.

The week of 6/22/2016 Bronto:
• Released Link Repair, a new feature that allows you to update links in messages after send. Once repaired, the new link will be provided to contacts in any delivery of a message that has been sent or was scheduled to send before the update was made.
• Added connector integrations to the Browse Recovery app. Now, when you configure Browse Recovery selectors, you have the option to select your Magento, Demandware, or Shopify Connector to automatically populate your selector configuration into the app.

The week of 6/27/2016 Bronto:
• Added the ability to map product placeholders when scheduling an A/B split test.
• Updated product tags so that you can now use a contact or API message field as the placeholder in a product tag. The field you use should represent a product's SKU. When you use a contact or API field as your placeholder, the SKU will automatically map to the Product ID in your product catalog, so there is no need to complete the additional product mapping step. See step 2 for more detailed information about how to do this.
• Added Toolbox app documentation.
• Published a new webinar Automation Strategies That Drive Revenue and Engagement

May 2016
All of the new features that were released in May 2016.

The week of 5/2/2016 Bronto:
• Released documentation for Pop-up Manager and Coupon Manager.

The week of 5/16/2016 Bronto:
• Released documentation for Socialite.
• Updated the online help search functionality to support search filtering. Now you can use:
  • and
• or
• not
to filter and further refine your search results. For example, if you search for abandon cart the first several results are related to workflows. If you are not interested in workflow help topics, you can change your search to abandon cart not workflows and search again. Now the search results will not include workflow topics.

• Updated online help to include a star rating in search results. This star rating is generated by the help system and indicates how close of a match the topic is to what you searched for. When you see one-and-two-star search results, it is a good idea to adjust your search query either by changing or adding to the current search words or by using search filters.

The week of 5/30/2016 Bronto:
• Added the ability to ignore the year when using date criteria to build segments. Previously this was only available for some date criteria, but now it is available for all date-based segment criteria that include years. Simply select the Ignore Year box to use this.
• Increased the maximum number of possible A/B split groups from 7 groups to 20.
• Added links to our webinars to the online help system.

April 2016
All of the new features that were released in April 2016.

The week of 4/4/2016 Bronto:
• Updated the orders REST API. Now when you use the API to update an order you can update both pending and processed orders. You cannot yet update processed orders using the platform or Data Loader app. Also, if you have a workflow that is triggered by an Order Is Added trigger node, that workflow will only be triggered for an order the first time an order’s status is changed to processed. This is true both when a pending order in Bronto transitions to processed or if an order with the processed status is added directly to Bronto.

The week of 4/18/2016 Bronto:
• Introduced a new logout SOAP API call that you can use to immediately end an authenticated API session.

March 2016
All of the new features that were released in March 2016.

The week of 3/7/2016 Bronto:
• Added two new parameters to Direct Import. The parameter fileCharacterEncoding allows you to specify a character set encoding to apply to your direct import. The parameter inAppAlert indicates whether you want to receive an in platform alert when the import finishes.

The week of 3/21/2016 Bronto:
• Added a new SMS Opt-In w/ Request for Email Workflow Template that customers who have purchased an SMS allocation can use to build a workflow that sends contacts a welcome SMS message when the contacts subscribe to an SMS keyword.
• Released updated videos that show how to:
  • Create Lists And Add Contacts To Yours Lists
  • Create Segments
  • Create Contact Fields

The week of 3/28/2016 Bronto:
• Added the ability to keep the status of existing transactional contacts from being changed by a contact import. See step 14. By default, contacts with a transactional status are automatically moved from transactional to onboarding status when they are included in a contact import. But now you can indicate that you do not want their status to be changed. You also have the option of preserving transactional contact status during direct imports using the preserveTransactional parameter.
February 2016

All of the new features that were released in February 2016.

The week of 2/1/2016 Bronto:

• Updated the Font Family Design menu in the email message editor to reflect which fonts will sometimes display as designed. You can continue to use any font listed, with the understanding that any fonts listed under Reduced Support are only available for a limited number of web clients, browsers, and/or mobile devices and the fonts under Limited Support are not supported by most.

The week of 2/8/2016 Bronto:

• Replaced content blocks with expanded content tag functionality. This feature update is a little complex, so we included an FAQ on this topic in What's New to help explain the change and address your concerns.
• Updated how list count is calculated. While changes to a list are made in real-time, not all list changes will instantly be reflected in the number of contacts shown for a list. List count is now updated nightly, except for a few exceptions that will trigger an instant update. See the Lists online help topic for a complete list of what is and is not instantly reflected in the list count.
• Changed the Table element to Text Grid in the email message editor. All of the functionality of this element remains the same.
• Changed Import CSS on the email message editor's Settings menu to Edit CSS. All of the functionality of this option remains the same.
• Changed the Saving message in the email message editor to Saving Draft. All of the functionality of this option remains the same. It's important to note that as the email message editor autosaves your work, it is saving a draft of the message. If you exit the email message editor without saving, when you go back to edit the message you can either edit this draft or the version of the message you saved.
• Added product tag support for MMS. You can now use product tags in your MMS messages.

The week of 2/15/2016 Bronto:

• Added the ability to target any element or container using a unique CSS class ID, which makes it easier to target specific containers and elements in your CSS as you design messages using the email message editor. You can find the CSS class ID by editing the container or element and then scrolling to the bottom of the palette. See Edit CSS, Elements Palette, Containers Palette, or Design Device Targeted Emails With Media Queries for more information.
• Published Data Loader app documentation.

The week of 2/22/2016 Bronto:

• Added the ability to undo the removal of Elements from a message when you are using the email message editor.

Content Tag FAQ

This FAQ is meant to help explain the change from content blocks to content tags in the email message editor.

Bronto replaced content blocks in the email message editor with content tags. Like content blocks, content tags allow you to create reusable blocks of content that you can use in the body of your messages. Unlike content blocks, content tags can be created outside of the email message editor. To create content tags go to Content > Content Tags. You also have the option to save a message as a content tag using the email message editor. For more information see Content Tags.

If you don't find the answer you want below be sure to contact your account manager if you have questions or concerns.

Why is Bronto making this change now? What is in it for me?

We decided to make this change for a few reasons. First, content blocks were a confusing name, designed to differentiate them from content tags. We realized it doesn’t make sense to offer different features that perform the same function, although in slightly different ways. Secondly, this allows you to manage your reusable content in one area of the platform instead of needing to navigate between two different areas. Finally, these new content tags support dynamic content.
Does this impact my current content tags or my ability to create content tags using the WYSIWYG editor?

No, this is purely the addition of new functionality. All of your previous content tags are still available.

What happened to my content blocks?

All of your account’s content blocks were converted into content tags and are accessible in the email message editor in the content tags section. Now have the ability to edit, rename, or delete your content blocks. Talk about control!

Drag and drop editor and legacy WYSIWYG editor - what's the difference?

The drag and drop editor works like the email message editor; you drag content to the canvas and design it on the palette. The legacy WYSIWYG editor works like the legacy WYSIWYG message editor; you design the content in a Word-like interface.

Which editor is right for me?

It depends on how you want to use the content tags. Generally if you design your messages using the email message editor, you will want to use the drag and drop content editor. Doing so allows you to maximize the benefits of responsive design and to continue to dynamically edit your content tags after they are added to a message. When you use content tags created with the legacy WYSIWYG editor in the email message editor, they are inserted as static HTML content. Inversely, if you design your messages using HTML or the legacy WYSIWYG message editor, then content tags designed with the legacy WYSIWYG content tag editor work best.

What is the new Content Tag Templates section for?

The Content Tag Templates section is an area that Bronto Professional Services will use to provide templates for the drag and drop editor. These templates can then be inserted into your account using the drag and drop message editor. If you’re interested in having Professional Services make some templates for you contact your account manager.

Why is my Content Tag Template section blank?

This section is reserved for Bronto Professional Services to design templates in the drag and drop message editor. If you contract with Bronto to have us build a template, this is where your templates will appear.

Can I edit these content tags via API?

No, only Legacy WYSIWYG content tags can be edited via API.

Can I insert drag and drop content blocks into the HTML editor?

We don’t recommend this because it could cause the responsive design elements of the content block to not respond properly in your message. If you design your messages in HTML your content tags should also be in HTML.

Can I insert a legacy WYSIWYG content tag into a message designed with the email message editor?

Yes, a legacy WYSIWYG content tag can be inserted into any message, whether created with the legacy WYSIWYG message editor or our new drag and drop email message editor. A legacy WYSIWYG content tag is any content tag you created before the new drag and drop content tag interface was created as well as any new content tags you create using the legacy WYSIWYG content tag editor.

What kind of dynamic tags are compatible with the new drag and drop content tags?

Any tags except for other content tags and API tags can be inserted into drag and drop content tags.
Do I have all the same functionality for drag and drop content tags that I did for content blocks in the message editor?

You have access to all of the email message editor’s Elements and Containers, but not the same options for Settings. Many Settings (message metadata, message design) didn’t make sense to repeat in content tags, so we removed them from the Settings menu. You still have the find/replace and the clear canvas options and can apply these settings to a content tag after it is added to your message.

January 2016

All of the new features that were released in January 2016.

The week of 1/4/2016 Bronto:

• Released the following videos to help guide you on using the email message editor:
  • Introduction to the Email Message Editor
  • Use Containers and Elements to Structure, Build, and Design Emails
  • Make Content Dynamic With the Email Message Editor
  • Add Product Data to Emails Using the Email Message Editor
• Released videos that show how to import product data:
  • Import Delimited Product Data Feed File
  • Import XML Product Data Feed File

The week of 1/11/2016 Bronto:

• Added the ability to set default sender options for an account. When you do this, every time you send an email these sender options will be used unless you specify different options when you schedule.
• Updated the way borders work in the email message editor to support limitations of various email clients. For information about current border functionality see the Design Menu help topic.
• Updated the Send Email action node to show a message preview when you hover on a message name in the message selection list.
• Added new selection options to the Order Is Shipped trigger node.

The week of 1/18/2016 Bronto:

• Released a Cart Recovery Series workflow template that accounts that have the Cart Recovery app can use to set up an email series based on cart abandonment.

2015

December 2015

All of the new features that were released in December 2015.

The week of 12/7/2015 Bronto:

• Expanded the character limit for workflow node labels to 65 character.
• Updated the Send Email workflow node so that you can now see a preview of the message that will be sent when you mouse over the node label.
• Added the External ID (API) as an optional column in the Search Contacts grid.
• Updated the way dynamic container content works in the message editor. Now when you make a container dynamic, the content currently in the container is automatically copied into the second dynamic content rule. See step 15 for more information.
• Added the ability to insert tags into the subject line of a message using the email editor. See step 8 for more information.
• Updated the Cart Is Abandoned Trigger Node to include a delay based on when a contact last placed their order. See step 4 for more information.
• Updated SMS messaging to include the ability to use product tags in SMS messages.
• Added a new Cart/Order Field Comparison Node that users of New Order Service can use in workflows to send contacts down different workflow paths based on specified cart or order fields.

The week of 12/14/2015 Bronto:
• Updated the rules for dynamic content in the message editor so that a default All Others rule is always created when you make a container dynamic. Any contacts who receive an email but do not fit into any of the other dynamic rules you defined will receive the version of the email associated with the All Others rule.
• Added the ability to include tags in links.
• Added new segment templates that can be used to quickly create and configure new segments.
• Added new workflow templates that can be copied to quickly create and configure workflows.

November 2015
All of the new features that were released in November 2015.

Every November, in the weeks leading up to Black Friday and Cyber Monday, Bronto puts a hold on releasing feature updates to the platform. This is to ensure system stability during your most busy time-of-year. We're still working hard and you'll be able to see, use, and read about all of that hard work in December. So, check back in on What's New on December 10th to see what we've been up to.

In November Bronto:
• Added the ability to set message or text alignment at the message level. See the Message Alignment and Text alignment entries in the linked table for more details.
• Added a new predefined product field called Inventory Threshold that can be used to indicate a product-specific quantity minimum a product should meet in order to be promoted.

October 2015
All of the new features that were released in October 2015.

In October Bronto:
• Added the ability for you to restore a deleted container when you are editing an email in the message editor. You can only restore the container during the same editing session in which you deleted it.
• Added a new Usage Alerts page you can use to configure usage alert settings for your account.
• Continued to make improvements to the message editor CSS functionality.
• Added the ability to set line height for text in Button, List, Table, and Text elements.
• Improved column width for containers so that you can now set a custom width for each column in a container.
• Add the ability to edit a hosted image in Bronto.
• Made country code a required part of a mobile number when adding or updating contacts via the API.
• Added the ability to include special characters in the subject line of messages (see step 8) or in text when creating emails with the message editor.
• Updated the design of message editor containers so that you can now choose whether the contents of a container will stack or shrink on a mobile device.

September 2015
All of the new features that were released in September 2015.

In September Bronto:
• Added the ability for you to provide a link on your site that a contact can use to securely access a manage preferences webform from your site.
• Limited contact imports to only support UTF-8 encoded files in order to resolve import issues.
• Added the ability to specify a link target when adding a link with the email message editor.
• Because Bronto no longer plans to store credit card information in the platform, we removed the ability to purchase bump upgrades through Bronto. You can still purchase bump upgrades by contacting your account manager.
• Added the ability to search for orders using a contact's email address.
• Made the resubscribe checkbox included on the Manage Preference webform by default.
• Improved text selection functionality in the email message editor.

**August 2015**

All of the new features that were released in August 2015.

In August Bronto:

• Released a new Previewer app that can be used to generate message previews, spam audit your message, and test a message's links and images. For more information about purchasing Previewer, see https://appcenter.bronto.com/apps/previewer.
• Updated the Message Editor to support using metadata tags and background images in emails and added product tags to the Insert button's list of tags.
• Added the ability to view the description for a workflow by mousing over the workflow name on the Workflow Overview page.
• Updated the Manage Preferences webform to include a new, required Resubscribe Checkbox special purpose content block that allows unsubscribed contacts to resubscribe using the webform.
• Added a new Order Is Shipped trigger node that Cart Recovery app users can use to send contacts email based on changes to an order's shipping date.
• Included a link to the support site and to ideas.bronto.com in the footer of the online help systems.
• Added text to the Send Email action node that indicates if the sent email uses cart or order data.
• Stopped supporting Internet Explorer 8.

**July 2015**

All of the new features that were released in July 2015.

In July Bronto:

• Graduated the new Message Editor from Bronto Labs. Now any new messages you create will use the new and improved editor.
• Graduated Products from labs. Now anyone can import their product data feeds into Bronto in order to use product data in messages.
• Added the ability to set a default prefix for test messages that can be included in the test message's subject line so that sent test messages are easily identifiable in Bronto.
• Added a new Cart Phase filter node that Cart Recovery app users can use to send contacts down different workflow paths based on their cart's phase when a it was abandoned.
• Added the ability to edit the name of a node when the node is used in a workflow.
• Updated the Workflow Canvas to include a node counter, so you can see how many nodes you have left for a workflow.
• Released a new Previewer app that can be used to generate message previews, spam audit your message, and test a message's links and images. For more information about purchasing Previewer, see https://appcenter.bronto.com/apps/.

**June 2015**

All of the new features that were released in June 2015.

In June Bronto:

• Added the ability to filter report data using a date range. You can also filter report data on comparison reports.
• Introduced Products to Bronto Labs.
• Updated the Contact Field trigger and filter nodes to include support for the following fields:
  • Average Order Value (AOV)
  • First Order Date
  • Last Order Date
• Last Order Total
• Total Orders
• Total Revenue

• Updated the **Workflow Canvas** to include a node counter, so you can see how many nodes you have left for a workflow.
• Added dynamic media URL support for MMS messages.
• Added the ability to download suppression lists from the **Export Contacts** page.
• Updated the design of the **Schedule Delivery** page.
• Added the ability to add CAPTCHA to the Add Contact webform.
• Added a checkbox to the manage preferences webform that lets unsubscribed contacts choose to resubscribe.
• Added Norwegian SMS translation for **HELP** and **STOP**.

**Node Counter**
Bronto added a node counter to workflows.

The **Workflow Canvas** now includes a node counter. This counter shows you how many nodes you have used out of the total number of nodes that are available for use in the workflow. If you exceed the number of available nodes, the workflow cannot be activated.

**Report Filtering By Date Range**
Bronto added the ability to filter reports using data ranges.

Now when you view a message or delivery report, you can filter the information on the report by date range. You can select from a list of commonly-used date ranges and also have the option to set your own custom date range.
What's New

You can also use date range filters when building comparison reports.

Comparison Report

Products In Bronto Labs
Bronto Labs now has the Products feature.

Bronto introduced a new feature called Products to Bronto Labs. With Products, you can import product information from data feeds into Bronto in order to use this data in your marketing campaigns.

To get started after you turn on Products, go to Tables > Products > Overview to access the Products Overview page. The Products Overview page is the starting point for all of the functionality related to importing your product data feeds into Bronto. Here you can access the configuration, fields, import, transaction report, and product search pages.
What's New

For more information about using Products, see the online help.

May 2015
All of the new features that were released in May 2015.

In May Bronto:

- Added the ability to set the default country code for a mobile number on webforms.
- Updated the Contacts Orders table to include a Status column, which indicates the current status of an order.
- Added the ability to include Captcha to the Add Contacts webform.

April 2015
All of the new features that were released in April 2015.

In April Bronto:

- Added the ability to search for contacts using email domains.
- Created a new Not On Any List option for List Membership segments.
- Added the ability to splits list based on which contacts on a list are active.
- Updated the text on the Contact Details > Orders and RFM metrics tab to simply read Orders.
- Increased the number of allowable characters for the Support Case option Reproducing The Issue & Description from 2,000 to 10,000 characters.
- Added support for Dynamic media URLs in MMS.
- Updated the Verify and Send message delivery pages to include a message's name.

New List Membership Segment Criteria
The Not On Any List option has been added to List Membership segment criteria.

When building a segment, you can now add the criteria Membership > List Membership > Not On Any List. This allows you to easily create a segment of orphaned contacts. You can use this segment with workflows to clean your contacts by removing orphans.

March 2015
All of the new BMP features that were released in March 2015.

In March Bronto:

- Introduced a new message editor to Bronto Labs.
- Improved Customer Relationship Management functionality. This includes:
  - Adding a Tables menu to the main list of menu options.
  - Moving Contacts to the Tables menu.
• Moved SMS and Text-to-Join to the Apps menu.
• Reorganized Email, Twitter, SMS, and Facebook messages into a single Messages option on the Messages menu.
• Improved the search functionality for delivery reports.
• Updated delivery types to provide better delivery metrics.
• Added shipping information to New Order Service.
• Created an Orders page that users of New Order Service can use to view order data.
• Removed the option to set a date range for the Add Contact Activity report.
• Graduated Profiler from Bronto Labs to a standard feature.
• Added new Contacts segment options.

New Message Editor in Bronto Labs
Bronto Labs has a new message editor.

Bronto introduced a new version of the WYSIWYG message editor to Bronto Labs. This new editor provides a simplified drag-and-drop experience while still maintaining all of the complex functionality of the previous message editor.

To test the new message editor, go to Home > Settings > Bronto Labs and flip the New Message Editor switch to Enabled. Then simply create a new email message using the HTML (WYSIWYG Editor) option.

**Important:** Existing messages cannot be edited with the new message editor, but you can continue to edit them with the old editor. The application automatically recognizes which editor you need- there's no need to turn the new message editor off.
**Improved Customer Relationship Management Functionality**

Bronto added a new Tables menu to the application.

In order to aid the functionality of CRM, Bronto has updated the application menu. The **Contacts** menu has been replaced with a **Tables** menu. All of the **Contacts** menu options are now located under the **Tables** menu. If you use New Order service, you will also find the new **Orders** page here.
Consolidated Messages Menu
Bronto consolidated messaging into a single Messages menu option.

In order to streamline the experience of working with messages, Bronto consolidated the Email, Twitter, Facebook, and SMS menu options into a single Messages menu choice. All of the functionality of working with these message types remains the same.

Updated Delivery Types
Bronto updated the available delivery types to provide better delivery metrics.

The possible delivery types for a message have been updated in order to allow you to have a more granular view of the types of messages you're sending. Delivery types now include:

- AMR: Deliveries that were sent via an Automated Message Rule.
- Bulk: Includes normal deliveries and split deliveries.
- FTAF: Deliveries that were sent as part of a FTAF webform. This type does not appear in delivery group metrics.
- Normal: Regular email deliveries sent to more than one contact.
- Skipped: Deliveries that were skipped by Bronto and not sent.
- Single Contact: Deliveries that were sent to only a single contact.
- Split Group: Deliveries that were sent as part of an A/B split test.
- Test: Deliveries that were sent as test deliveries.
- Transactional: Deliveries that were sent as transactional emails.
New Orders Page
Bronto created an Orders page that users of New Order Service can use to view order data.

The Orders page provides the ability to search through and view the orders in an account. This allows users of New Order Service to quickly locate specific orders based on an order or contact ID.

New Order Service Added Shipping Information
Bronto added shipping information to New Order Service.

Users of New Order Service can now track order information related to shipping. This includes the shipping date, shipping cost, shipping details, and a tracking URL.

New Contacts Segment Criteria
Bronto added the ability to create segments for contacts who have a consecutive number of bounced or unengaged messages.

The following are new Contact criteria options you can add to your segments:

- **Bounced Contacts**: allows you to create a segment based for contacts who have had a specified number of bounced messages.
- **Non-Engaged Contacts**: allows you to create a segment for contacts who have either not clicked on or not opened a specified number of recent messages.

February 2015
All of the new BMP features that were released in February 2015.

In February Bronto did not release new features, but instead focused on improving application functionality and responding to customer feedback.

January 2015
All of the new BMP features that were released in January 2015.

In January Bronto:

- Made SMS available to Canadian customers.
- Added alerts for delivery ratings below 5 and high bounce deliveries.

Canadian SMS Support
Bronto can now handle Canadian SMS messages.

You can now send SMS messages to your Canadian contacts using the Canadian short code 33233. This feature is available to anyone in either the United States or Canada.
MMS is not yet supported for Canada.

**Delivery Alerts**
Bronto has added new alerts to keep you aware of issues with your message deliveries.
You will now receive alerts when:

- Your delivery rating falls below 5.
- A message you send has a high bounce rate.

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**Get Started With Bronto**

Bronto's robust flexibility can make it hard to know where to start. Let us help you get oriented.

The Bronto Marketing Platform (BMP) helps you deliver timely, relevant, data-driven digital marketing that fuels engagement throughout the customer life-cycle and drives more revenue. In order to get started with Bronto, you will need to import valid contacts and design messages you can send to those contacts. It doesn't matter if you start by designing messages, or start by importing contacts, or even have a team tackle both at once. Contact management and message management are independent of each other until you start using contact data in messages, scheduling (sending) messages, or targeting message design for a particular audience using segments or lists. Then, once you have your contacts and messages, you can start sending messages and using reporting to monitor your success.

The Bronto help system covers everything you need to know about working with the platform, which can be an overwhelming amount of documentation as you get started. The help topics in this section are designed to help you understand the general concepts related to contacts, email messages, sending, automation, and reporting and provide links to the help topics that contain the granular details of working in each of these areas. Think of this section as your cliff notes to the BMP and its online help system.

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**Get Started With Bronto Accounts**

One of the first things you will need to do as you onboard onto Bronto is to set up your account.

**Sending Domain**
As you onboard onto Bronto, one of the first decisions you need to make is what domain you want to use for your sending domain. A sending domain is used by ISPs and email providers to verify a sender's identity and to track sending reputation. The reputation of your sending domain greatly impacts your deliverability; i.e. determines whether your messages make it to your contacts' inboxes. With Bronto, you can choose to use either Bronto's domain or a private domain, which can be either your company's domain or a company subdomain used specifically for email messages. See [Sending Domain](#) on page 1320 for more information.

**Account Settings**
The [Account Info](#) link in the banner allows you to see account overview and usage information, while the [Home](#) menu is where most of your account settings can be configured. Configurable account options include:

- Changing your contact info and login settings
- Configuring a site name, emergency email contact, and setting defaults and limits
- Updating the contact information used for your account
- Adjusting platform security settings
- Creating, managing, and deleting other account users

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**Get Started With Contacts**

In order to send messages, you need to have Bronto contacts to send messages to.
Getting started with contacts can be broken into three phases. First you need to set up Bronto to import your contacts by creating contact fields and lists. Next, you can import your contacts. Finally, imported contacts need to go through the onboarding process and can be managed (grouped) using segments and lists.

Contact Fields
All of the data you know about your contacts - such as their email address, first name, favorite color, or birthday - are stored in Bronto in contact fields. Each data point about a contact is its own field. Not only can these fields be used to store data, they can be used to create targeted groups of contacts based on similarities, or used in messages for personalization.

Before you import your contacts you should create a contact field for each type of data you want to store for your contacts. You can either Create Contact Fields Using A Default Field Type on page 560 or Create Custom Contact Fields on page 562. You can always make additional fields later, but you can only import the contact data you have a corresponding field for.

Lists
It's helpful to add contacts to a list as you import them, so you should Create A List on page 534 for newly imported contacts. While you will want to use segments to dynamically group and target contacts based on shared traits after they have been onboarded, adding new contacts to a single list as part of the import process allows you to quickly onboard contacts using a welcome message or series.

Contact File Encoding
When you import your file, you are required to identify the character set encoding used in the file. While you have the option of selecting I don't know my character set, it is important to try to identify the encoding your file uses so special characters in the file are imported successfully.

Import Contacts
You can import contacts using the Bronto platform by either importing a CSV file, importing a tab-delimited file, importing a Salesforce report, importing contacts using Data Loader, or you can programmatically import contacts contained in a .csv file using direct import. While Bronto's API can be used to import a single contact, it's not used to import large groups of contacts.

Contact Statuses Automated Onboarding
When contacts are imported into Bronto, they are automatically given the status of onboarding, unless an imported contact already has an Inactive status. When contacts are sent a marketing message for the first time, the contacts enter a 48 hour assessment period that Bronto uses to monitor each contact in order to determine if the contact will have a negative impact on your account. At the end of the assessment, contacts are assigned the correct contact status based on what happened during the onboarding period. If you want to quickly onboard contacts, you can identify a marketing message to send contacts as part of the import process. Therefore, if you plan to send a message as part of the import process, make sure you design the message before you start your import.

For more information see Automated Onboarding on page 1081.

Group Imported Contacts With Lists and Segments
As mentioned previously, you can use lists and segments to create groups of contacts that can be used for sending and reporting. Lists are static groups of contacts. You have to manually add or remove contacts from lists. This video demonstrates how you can create lists and add contacts to lists. Segments are dynamic groups of contacts. When you create a segment, you define criteria a contact must meet in order to be part of the segment. Bronto automatically adds contacts to the segment as they meet the segment criteria and removes them as they fall out of meeting the criteria. This video demonstrates how you can create segments.

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Get Started With Email Design

Good email design is a fundamental piece of a successful marketing strategy.

To start working with messages navigate to Messages > Messages. On this page you will see three or four type of messages: Email, Facebook, Twitter, and SMS. (You will only see SMS if your account purchased an SMS allocation.) In Getting Started we're only going to cover email messages.

Email Editors

When you go to Messages > Messages and click Create New Message, then Create Email Message, you are given the option of selecting one of five email editors:

- **Email Message Editor** is Bronto's newest editor. The email message editor provides a drag-and-drop design experience and messages created with this editor support responsive design. This editor is the best choice if you plan to send messages that you want to work on a variety of devices and like to see what messages look like as you design them.

- **HTML (Code Editor)** lets you directly code messages using HTML. You should use this editor if you want to "import" (copy/paste) messages that were previously designed using HTML or if you prefer using HTML code to a GUI editing experience. When using the HTML editor, you have the option of turning on a **WYSIWYG editor**. The WYSIWYG editor provides a MS a Word-like editing experience.

- **Plain Text Message** allows you to design messages that will only be sent as plain text.

- **Send Webpage** allows you to enter the URL for a web page and use it as an email message.

- **Template Message** is like using email stationery or letterhead to provide a design for your message that you can simply add content to. Bronto provides several default email templates and you can also upload your own templates by going to Content > Email Templates. Templates are not designed in Bronto. If you want to use the design for a message you create din Bronto over and over again, you can make a copy of a message and update the new message appropriately.

The email message editor and the HTML/WYSIWYG editor are the primary editors, while the other three editors serve a very specific purpose. Messages created in one editor can not be opened or edited in a different editor, so carefully consider your needs before selecting an editor to work with. Because there is the option to apply a CSS style sheet to your message when you use the email message editor, we recommend using this editor unless you plan to do extensive HTML coding as you design messages.

Email Message Editor Elements and Design

To design emails using the email message editor, you will drag **containers** from the Containers palette to the canvas. A container works like a row and can have anywhere from one to six "columns". Content can be added to a container column by dragging different **elements** from the Elements palette into the container columns. Any container or element you add to the canvas can be easily be moved by clicking on it and dragging it somewhere else on the canvas.

Typically, when you add an element to the canvas, a new panel slides out over the palette. This is where you can edit the content of the element, for example add text or identify the URL you want to use, or design the appearance of the element. You can access the panel for any element by mousing over the element and clicking the Edit button that is displayed in the list of options below the element. The container design panel can be accessed by mousing over the container and clicking the Edit button that is displayed in the list of options above the container. You can also access global message design options, including adding CSS, from the Settings palette.

The GUI-configurable design elements for containers, elements, and messages overlap, so the Design help topic can be referenced for help with the design settings for any of these. A message's design settings always default to the most specific design, so element level settings will override container level settings, and element and container level settings override message level settings.

HTML/WYSIWYG Editor Elements and Design

With the HTML/WYSIWYG editor you use an invisible table to create the overall message design. Cells in the table can be assigned attributes, such as width, height or color, in order to accommodate the unique layout and design needs.
of the message. Content can be added to the cells in the table either using HTML or the WYSIWYG editor. Some content, such as text, can be designed by applying CSS or using various WYSIWYG buttons.

This help topic provides some recommendations for good HTML email design. All of the WYSIWYG-specific options are covered in the topics found in the WYSIWYG help section.

Headers, Footers, and Subject Lines

Headers and footers are message elements that are often consistent across messages in a campaign or for every message sent by a company. Therefore, you can create headers and footers outside of the message design process. Once created, the headers and footers are available to be added to your message. If you typically want to use the same header or footer in most messages, you can set a default for messages sent from your account. This default can be overridden by selecting a different header or footer as you design a message. See how to add headers and footers in the email message editor or see step 10 for how to in the WYSIWYG editor.

Writing effective subject lines is one of the most important aspects of email design. You can use message tags or dynamic content to personalize your subject lines and emojis to help make your subject lines stand out.

Message Personalization

Regardless of the which of these two editors you use, Bronto provides several options to customize the same message for different audiences. First, various message tags can be used in many different ways/places in an email. Adding a message tag to an email creates a placeholder where content associated with the tag will appear when the message is sent to a contact. For example, you could add the field tag %%firstname%% and when the message is sent, the first name of the contact the message was sent to replaces the tag.

All tags can be hard coded into a message using the proper tag syntax and most can be added using a button or menu selection. In the email message editor, tags can be added to various elements using the Insert menu that appears on the content design tab. In the WYSIWYG editor, you can use drop down menus to add field or special tags. For information about the syntax for different types of tags see:

- Field tags: The categories of information you have stored for your contacts. Example: %%firstname%% For more information, see Field Tags on page 151.
- Special tags: The default, Bronto-provided tags. Example: %%!unsubscribe_url%% For more information, see Special Tags on page 152.
- Content tags: Reusable blocks of content you have created using the Content > Content Tags page in Bronto. Example: %%newitems%% For more information, see Content Tags on page 140.
- RFM tags: The RFM metrics that have been collected for a contact. Example: %%rfm_newest_order_date%% For more information, see RFM Field Tags on page 152.
- Cart/Order tags: Data collected about shopping carts, if you use the Cart Recovery app, or orders. Example: %%$cart.discount%% For more information, see Add Cart and Order Data To A Message on page 175.
- Product tags: The product fields that you have imported into Bronto. Example: %%$product.placeholder.field%% For more information, see Product Tags on page 170.
- API tags: User-defined tags that allow you to insert HTML content into the body and subject line of messages using the API. The syntax for creating an API message tag is %%#userdefined%%, where userdefined can be anything you want it to be. For more information see API Message Tags on page 160.
- Loop tags: Passes an array of content about the same item. Loops are commonly used with either Cart/Order tags or API tags. For more information about loop syntax for API tags see API Loop Tags on page 163. For more information about loop syntax for Cart/Order tags see Cart Loop Tags on page 176.

Messages can also be personalized for different groups of people using dynamic content. Dynamic content allows you to specify rules that must be met in order for a block of content to display. For example, you may want contacts on a specific list to see a different coupon code than the other contacts who receive the email. To do this, you can make the coupon dynamic, where the rule states that if contacts are on a specific list they will see the content and all other contacts will see the default version of the message without the coupon code. In the email message editor you can make containers dynamic. See this video for a demonstration. In the HTML/WYSIWYG message editor you can use the Insert Dynamic Content button to add dynamic content.
Get Started With Sending Email

After you have contacts to send to and have designed emails you want to send, you can manually schedule deliveries using the Bronto platform, automate message sends using workflows and automated message rules, or send messages via Bronto's API.

Bronto uses a sender rating to determine your eligibility to send messages. Your sender rating is driven by the level of contact engagement (opens, clicks, conversions) your sent emails that were received, complaints your emails receive from ISP Feedback Loops, and internal measurements that we use to help you optimize your deliverability. If you have a lower sender rating, these tips can help you fix it.

Sending Rules and Best Practices

It is important that your deliveries comply with the CAN-SPAM Act and Bronto's sending rules. A contact's status indicates whether or not you can send marketing emails to a contact. Contacts with a transactional status can only be sent transactional messages. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. If you have an email message that you would like to send as a transactional email, you need to request approval for that email message.

When sending to contacts with an onboarding status, the number of contacts you can include in an assessment is determined by your Sending Max. Initially, an account's Sending Max limits sending to a maximum of 100,000 contacts who have an onboarding status. As contacts are onboarded, the Sending Max is increased or decreased based on a combination of the success of the previous assessment and on your Sender Rating. For more information about how onboarding new contacts works, see Automated Onboarding on page 1081. The Sending Max is designed to prevent a batch of new, "bad" contacts from tanking your sender rating, so these limits do not apply to the number of already active contacts you can send to.

Schedule Deliveries Manually

When a message is sent to contacts, it is called a delivery. When it comes time to schedule a delivery, you will need to set the parameters that define how, when, from whom, and to whom the email message will be sent. If your account always uses the same sender options for deliveries, you can set default sender options that will be automatically applied for every delivery. There are three types of deliveries you can manually schedule:

- **Regular Delivery** sends the message to the contacts you select as recipients using the sending schedule you specify.
- **Test Send** allows you to send a test message to a few contacts you specify to ensure it is ready before you send it to your contacts. Typically these "contacts" will be yourself or someone else in your company who tests emails. Before you send a test delivery you should set the test delivery options for your account.
- **A/B Split Tests** sends different versions of a message to initial groups of contacts and the most popular message is sent to the remaining contacts. A/B split tests allow you to quickly compare multiple versions of a message in a way that lets your contacts choose the best performing option.

When you select contacts to send to, you can choose to send a message to specific lists or segments or to your Facebook or Twitter accounts. Therefore, you should set up your lists or segments before you start sending. Lists are static groups of contacts. You have to manually add or remove contacts from lists. This video demonstrates how you can create lists and add contacts to lists. Segments are dynamic groups of contacts. When you create a segment, you define criteria a contact must meet in order to be part of the segment. Bronto automatically adds contacts to the segment as they meet the segment criteria and removes them as they fall out of meeting the criteria. This video demonstrates how you can create segments.

An email message cannot be recalled or retracted once sent. Due to the way email works, no provider is able to recall email messages that have been sent out. You can cancel an email message that has been scheduled but hasn't been sent, or a message that is being sent but hasn't completed.
**Automate Message Deliveries**

Automation menu is where you can automate the sending of your messages using workflows and automated message rules. It's important to note that automated message rules predate workflows, so you can accomplish anything automated message rules offer with workflows and more.

**Workflows** allow you to set up complex rules that can be used to manage contacts and contact data and send messages. Every workflow starts with a single **trigger node** that represents an event that occurred in your account. Once a workflow is triggered, the **filter nodes** in the workflow define what additional criteria must be met. Finally, **action nodes** represent what a workflow does when the trigger and filter criteria that led to the action node are met. While workflows can only have a single trigger node, they can have dozens of filter and action nodes which allow you to branch a workflow based on if/then logic.

Any workflow you use to send an email needs to include the **Send Email action node**. A very basic example of how you might want to set up a workflow to send emails: Start a workflow with a **Segment Membership Change trigger node** and set this node to trigger the workflow when a contact is added to a particular segment. Next, add a **Send Email** action node and connect it to the trigger node. Then, when contacts are added to a segment they are sent the message your identified for the Send Email action node. Bronto provides several workflow templates to help you get started with creating commonly used workflows. The **Welcome Message** and **Welcome Series** workflow templates are especially helpful as you set up your initial Bronto sending campaigns.

It's always helpful to sketch out a workflow on paper before you build it using the workflow builder in Bronto. It's also a best practice to test a workflow before you activate it for use.

**Automated message rules** are a set of criteria used for sending email on an on-going, or case-by-case basis. There are four different types of automated message rules:

- **Activity-Based** Send messages when a contact performs an activity in response to a related message that you sent to them.
- **Date-Based** Send messages when a chosen field for a contact matches a specified date or month.
- **Schedule Recurring** Send messages on a periodic basis, such as monthly coupons.
- **API Triggered** Send messages when a rule is called via the API.

**API Message Deliveries**

Bronto provides a **robust API** that can be used to accomplish many of the same tasks that can be done using the Bronto platform. Use the SOAP-based **addDeliveries call** to send messages via the API. There are two code-example-based tutorials on how to send messages via the API: **Send Emails** and **Send Transactional Messages**.

**Get Started With Reports**

Reports are how you can measure the success of your marketing campaigns and recognize trends, both negative and positive, that can be used to make adjustments in order to drive greater engagement with your contacts.

There 8 primary types of reports related to different types of sends:

- **Message reports** represent an aggregate of the metrics associated with all of the deliveries made using a message.
- **Delivery reports** contain all of the metrics associated with an individual delivery of a message.
- **Delivery Recipient reports** contain all of the metrics associated with an individual delivery sent to a specific list or segment.
- **Delivery Groups reports** report contain all of the metrics associated with each delivery or post added to a delivery group.
- **A/B Split Test reports** are an aggregate of all the metrics associated with an A/B split test.
- **Workflow reports** contain all of the metrics associated with deliveries made via a workflow.
- **SMS Message reports** represent an aggregate of the all the metrics associated with all of the deliveries of an SMS message.
- **AMR reports** are an aggregate of all the metrics associated with all the days an automated message rule has been sending messages.
These reports can be accessed by going to the area of the platform related to the report you want to view and clicking the report icon in the table. For example, if you want to view a workflow report, you would go to Automation > Workflows, locate the appropriate workflow name in the Workflows table, and click the report icon associated with that workflow.

Each of these reports can be viewed individually or used to build a comparison report. You can also download reports, either immediately or at scheduled intervals.

In addition to the reports listed above, you can access several other reports related to account metrics from the Legacy Reports.

Common Report Sections

Report sections are groups of metrics found on a report. After you have opened a report, you can navigate between different sections in the report by clicking a section label in the header of the report. Common report sections include:

- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
- **Deliverability** displays deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.
- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.
- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.
- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (Legacy) on page 734.
- **Profiler** allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For more information about Profiler, see Report Profiler on page 751.
- **Metrics By Delivery** displays a quick view of the metrics associated with the deliveries of the message. For more information about Metrics By Delivery metrics, see Metrics By Delivery Report Metrics (Legacy) on page 737.
- **Metrics By Day** displays an aggregate of all the metrics associated with all the days an automated message rule has been sending. For more information about Metrics By Day metrics, see AMR Metrics By Day Report Metrics on page 744.

Report Metrics

The Report Metrics help section contains help topics for all of the report metrics. Each help topic explains what the metric is, why it is important, and how the metric is calculated. These topics include every report metric from Click Rate, Open Rate, and Conversion Rate to Frequency Cap (Skipped) and Inactive Due To Bounces.

Help and Support

Most of the information you need to use Bronto is in the online help system. If you cannot find what you need in the documentation, Bronto support can help you resolve your issues.

Online Help Tips

The online help system provides all of the information you need to successfully use Bronto.

To open the help, click Help, located in the banner of the application.

The online help opens in a new browser tab or window to the page most relevant to the application page you are on.
### Task | Action
--- | ---
Quickly find information | Type a keyword or phrase in the Search box and click **Search** or hit **Enter**.
Print a page | Click the **Print** icon in the page header.
View all topics in the online help | Click the **Plus** icon next to the Table of Contents.
Hide the Table of Contents frame | Click the arrow tab between the TOC and help page.
View the Table of Contents frame when it is not showing | Click the arrow tab between the TOC and help page.
View a topic | Click on topic title in the Table of Contents or Search Results.
View nested topics | Click the **Plus** icon to the left of a topic title.
Hide nested topics | Click the **Minus** icon to the left of a topic title.
View the Table of Contents when Search Results are shown | Click the **Table of Contents** tab. The page you are on is green in the TOC.
Make the Table of Contents frame larger or smaller | Click the vertical bar and move it to the left or right.

### Get Support

Support resources can be accessed from any page in the application.

If you need support, you can click **Live Chat** or **Bronto Support** in the top-right of the screen.

Please keep in mind that chat is for quick questions. If you have a more in depth issue, or a question concerning the API, we suggest that you open a support case by clicking **Support**. This provides a way for you to track the progress of your issue.
Create and design Knowledge Base topics cover everything you need to know about building messages and the content that goes into messages.

Messages include emails, SMS messages, Facebook posts, and Tweets. While SMS, Facebook, and Twitter messages all have a single editor you can use, Bronto offers a few different email editing options. We recommend using our email message editor for most of your email creation and design purposes.

No matter which editor you use, the message personalization topics explain how you can use message tags and/or dynamic content to build versions of a message that can be targeted to individual contacts (message tags) or groups of contacts (dynamic content). Personalization can also be used in SMS messages. You can also use content tags to create reusable blocks of content.

Email Message Editor

You can use the email message editor to quickly and easily build your email messages.

Bronto's new message editor provides a simplified drag-and-drop experience while still maintaining all of the complex functionality of the legacy message editor. All new messages created with an editor will use the new message editor. All existing messages edited with an editor will use the legacy WYSIWYG editor. For more information about the WYSIWYG editor, see Create Email: WYSIWYG Editor on page 100.

The message editor is divided into three primary work areas:

- The canvas is where you place elements in order to design the body of your message.
- The palette is where you select and edit the elements of your message.
- The subject line is where you can enter a subject line or select the option to use dynamic content

Related Topics

Video: Intro to The Email Message Editor
Create Email: Message Editor

This topic walks you through the basics of using the message editor to build an email message.

The message editor is designed to let you quickly and efficiently compose emails through a drag-and-drop experience. More specific details about each individual option in the editor are provided in the additional help topics that this topic links to.

For a video overview about using the email message editor, see Intro to The Email Message Editor.

Note: If you are editing an older message that was created with the WYSIWYG editor, the message will open in the WYSIWYG editor. For more information about the WYSIWYG editor, see Create Email: WYSIWYG Editor on page 100.

As you work on your email Bronto automatically saves a draft. If you exit the message editor without saving the message you will be able to choose whether you want to edit the draft or saved version of the message.

To create an email message using the message editor:

1. Go to Messages > Messages.
2. Click Create New Message.
3. Click Create Email Message.
4. In the Name Your Email Message section, add a name for the email message in the Message Name text box.
   The email message name is the unique identifier for the email message. Name the email message something relevant to its purpose.
   Note: The message name is not the subject line for the email message but will be used as the subject line if no subject line is specified.
5. Optional: In the Message Organization section, select a message folder to store the message in using the Message Folder pull-down menu.
   You can also add a new message folder by clicking the Create a new folder in the selected folder checkbox and adding a name for the folder in New Folder Name text box. If you do not select a message folder, the message will be kept in the Messages folder by default.
   For more information on message folders, see Use Folders To Organize Your Messages on page 964.
6. Optional: If you have enabled Campaigns, select a campaign to associate with the message:
   a) Click No Campaign Selected.
   b) Select the campaign from the list.
   If you want to create a new campaign, click New Campaign, enter a name for the campaign in the Name box, select a marketing campaign type from the Type list, enter a Description, and then click Save Changes.
   c) Click Apply.
7. Click the Email Message Editor radio-button.
8. Click Next.
9. Add a subject line for your email message by either
   • Typing a subject in the Subject text box to use a static subject line.
   To add tags or special characters to the subject, click the arrow at the end of the subject line box and select the relevant choice from the list. If you chose Insert Special Characters, use the special character keyboard to enter them. For more information about the other options in the list see Cart and Order Tags, Field Tags on page 151, Special Tags on page 152, RFM Field Tags on page 152, or Product Tags on page 170.
For information on writing subject lines, see Effective Email Subject Lines on page 203. You can also use Persado Predict to determine what subject lines will perform the best.

For information about using an emoji in your subject line see the Power of Emojis strategic blog post.

- Selecting **Make Subject Dynamic** from the drop down menu to set up a dynamic subject line.

Set up the rules for your dynamic subject line in the palette. The first rule you set up will always be If and then you have the option of setting up AND, Otherwise If, or All Others rules. Be sure to click the **Edit Subject Line** button for each rule you configure to add the subject line you want to associate with the rule.

If you do not add a subject line then the message name will be used as the subject line by default.

**10. Build the outline of your message with**

- **Containers**
  Containers work like rows in a table. Each container has the specified number of columns, boxes, that you can add content to.

- **Content Tags or Templates**
  Content tags are blocks of content you have created and can use as a template.

If you want to see (or hide) the outline of your message while you design it, click the **Outline Mode** toggle at the top of the message to turn the outline mode on or off.

To add containers:

a) Click on **Containers** to open the palette.

b) Click on an item in the palette and use your mouse or track pad to drag it to the canvas.

c) Drag the item up or down the canvas until it is in the place you want it in relation to the other items on the canvas and then "unclick" to place it on the canvas.

To add a content tag:
a) Click on **Content** to open the palette.

The Content Palette with content tag options is displayed.

![Content Palette](image1)

b) Click on **Insert Content Tag**.

The **Insert Content Tag** window opens.

c) Click on the content tag you want to use.

We recommend using content tags designed with the drag and drop content tag editor for better responsive design support.

d) Select either

- **Dynamic Tag** to add the content tag to your message but still retain the link to the original content tag. This means any updates you make to the tag using the content tag editor will automatically be reflected when a message is sent. When you insert a content tag dynamically, the appearance of the content tag will look similar to any other dynamic tag you can use in a message: `%%@tagname%%`.

- **Static Tag** to add the content tag to your message without retaining a link to the original content tag. When you do this the contents of the content tag are added to your message and you can edit it like any other part of the message.

e) Click **Insert Content Tag**.

11. Optional: To add headers or footers to your message

a) Click the **Content** palette.

b) Scroll to the **Headers & Footers** section.

![Headers & Footers](image2)

c) Select a header or footer from the list.

After you select a header or footer, it appears on the canvas. To change it, select a different header or footer from the list.

12. To add content to your containers

a) Click on the **Elements Palette** on page 57 to open it.
b) Click on an item in the palette and use your mouse or track pad to drag it to the canvas.

c) Drag the item until it is in the box you want it and then “unclick” to place it on the canvas.

d) Provide additional information for the item in the element's **Content** tab, as necessary.

An element settings menu consists of two tabs. The **Content** tab is where you add the attributes relevant to the element. For example, if you added an **Image** element to your message you will need to provide the attributes for the image, including the **Image URL**. Each element has a different set of requirements. For more information see **Elements Palette** on page 57.

e) Format the item, as desired, using the **Design** tab.

The **Design** tab is where you can design the style of your element. For more information, see **Design (Format) Message Content** on page 87. The one exception is the **Text** element, which provides design options on both the **Content** and **Design** tabs.

f) Click **Done**.

13. To access and edit the global message options,
   a) Click the **Settings Palette** on page 80.
   b) Click a button in the palette.
   c) Provide additional information for the item, as necessary.

   For more information about each option see **Settings Palette** on page 80.

14. To edit an item after it is already on the canvas, mouse over it and
• For containers, content blocks, or templates click on one of the large blue buttons that appear above the row.
• For message elements, click on one of the small green buttons that appear below the item.

When you click Edit for an individual element, you are only styling that element. When you click Edit for a container, you are styling the entire container and all of its elements. For more information, see Design (Format) Message Content on page 87.

A message's design settings always default to the most specific design. If you apply the same design setting to an element, a container, and import a CSS for a message, the element design will respect the design settings that were set at the element level. For example, if you make the Background Color for a container blue and give the text in the middle cell of that container a green Background Color, the left and the right cell in the container will have the blue background, but the middle cell will have the green background you assigned to the Text element. For Text elements, any font design set in the Content tab will supersede Design tab settings.

15. To

• Delete an item, mouse over it and click Remove. If you accidentally delete something, you can click the Undo button to add the Element or Container back to the message.
• Copy an item, mouse over it and click Copy.
• Move an item, mouse over it and click Move.
• Design an item, mouse over it and click Design for rows or Edit for individual items.

Remember, the blue button edits the row and the green button edits single items in a cell in the row.

16. To make the content in a container dynamic:

a) Mouse over the container.
b) Click Dynamic.

c) In the Edit Dynamic Content Rules panel, set up your rule criteria:

1. Select the criteria from the list. For example, select On Segment.
2. Click + and select the item you want to use. For example, select the segment you want to use.
d) When you are done with the first rule, click New Rule to add another rule.

By default, the content in the message for the first rule is copied into the other rules as you create them. You can edit or delete this content as appropriate.
e) Set up your new rule and any subsequent rules you would like the container to have.

When you add dynamic content, an All Others rule is automatically defined. Any contacts who do not fit into any of the dynamic content criteria you set are sent the version of the container that is associated with the all other rule. Make sure that you appropriately configure the container content for this default rule as well as the rules you defined.
f) Click Done.
g) Select the rule you would like to work with from the Active Dynamic Rule list to the right of the container.

The content in the container will change to the content for that rule.
h) Edit the content in the container for this rule, then design it.

When you are done, the container should match what contacts who fit the rule should see when they open the message. You can see other what other rules look like, or quickly access the Edit Dynamic Content Rules panel, using the container's dynamic content shortcut on the message canvas.
To see the dynamic content for another rule in the container, change the value in the **Active Dynamic Rule** list.

To edit the rule, click the lightning bolt to the right of the container. The **Edit Dynamic Content Rules** panel will open and you can make your changes.

i) Continue to view, add, and design content for each of your rules until the message is how you want it to be.

17. When you have finished building your message

- Click **Save** to save your message.
- Click **Save & Close** to save your message and exit the page.

**Related Topics**

**Video: Intro to The Email Message Editor**

**Use Folders To Organize Your Messages** on page 964
By default, all the messages you create are housed in the Messages folder but you can create additional folders in order to organize your messages.

**Message Tags** on page 149
There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

**Send Email** on page 279

**Use Predict** on page 1276
When you are creating a subject line for a message, you can use Predict to help determine what subject line will be the most successful.

**Containers Palette**

The **Containers** palette has containers that you can use to structure your message.

Think of a container like a row on a table. When you add a five column container to your message, you will have a row in your message with five boxes you can place elements in. You can add a container to your message by clicking on it and dragging the container to your canvas.
When you already have containers on your canvas, you can move the new container up or down to choose where it is placed in relation to the other containers. The area the new container will be placed on the canvas is highlighted in blue. Unless you add a border to a container, a contact will only see the content within a container, not the container itself.

Once a container is on your canvas you can:

<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
</table>
| Add elements to the container | 1. Click on the **Elements** palette.  
2. Click on an element in the palette and drag it to the canvas.  
3. Place the element in a container box and then unclick on the element. |
| Move the container     | 1. Mouse over a container.  
A list of options appears above the container.  
2. Click **Move** and while still clicking move the container on the canvas.  
3. Drag the container up or down the canvas until it is in the place you want it in relation to the other containers on the canvas and then “unclick” to place it on the canvas. |
| Edit the container     | 1. Mouse over a container.  
A list of options appears above the container.  
2. Click **Edit**.  
3. Design the container. For more information, see [Design (Format) Message Content](#) on page 87.  
You can click the **Reset** button in the editing panel to revert all of the settings back to when you opened the element or container. |
<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
</table>
| Control a container's visibility based on device | 1. Mouse over a container.  
   A list of options appears above the container.  
2. Click Edit.  
3. On the Layout tab click  
   • **Hide on mobile** to hide the container when a message is viewed on a phone.  
   • **Hide on desktop** to hide the container when a message is viewed on any device that is larger than a phone. |
| Keep columns in a container from stacking on a mobile device | By default, when an email is viewed on a mobile device columns in a container stack on top of each other to avoiding shrinking the content in the container. However, in some situations you may want the content in the container to shrink so the columns in the container can maintain their vertical alignment.  
This only works when the columns in your container are set to equal widths.  
1. Mouse over a container.  
   A list of options appears above the container.  
2. Click Edit.  
3. On the Layout tab, select **Do not stack on mobile**. |
| Set column width | Sets the width of a box in a container.  
Set custom column width for a container box by opening a container's settings and selecting either **Equal Column Widths** or **Custom Column Widths** from the Layout tab. If you select **Custom Column Widths** you can further edit each box width by either:  
• Sliding the bar for a container to the left or right  
• Entering a new number in the px box  
The total width of a container must equal 640 px. When you adjust one container box, the other container boxes will be adjusted in order to meet the 640 px requirement. |
<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
</table>
| Make the container dynamic | 1. Mouse over the container.  
2. Click **Dynamic**.  
3. In the **Edit Dynamic Content** panel, set up a rule for the container.  
   By default, an All Others rule is created. Any contacts who do not fit the rules you define will see the content associated with the All Others rule.  
4. When you are done with the first rule, click **New Rule** to add another rule.  
   When you add a new rule the container content from the previous rule is automatically copied into the new rule.  
5. Step up your new rule and any subsequent rules you would like the container to have.  
6. Click **Done**.  
7. Mouse over the container and select the rule you would like to work with from the **Active Dynamic Rule** list.  
8. Add content to the container for this rule, then design it.  
   When you are done, the container should look like what you want contacts who fit the rule to see when they receive the message.  
9. Continue to view, add, and design content for each of your rules until the message is how you want it to be. |
| Copy the container | 1. Mouse over a container.  
   A list of options appears above the container.  
2. Click **Copy**.  
   A copy of the container is added to the canvas below the current container. |
| Delete the container from the message | 1. Mouse over a container.  
   A list of options appears above the container.  
2. Click **Remove**.  
   After you delete a container, you can add the container back to the message by clicking the **Undo** button. **Undo** restores the container or element that was most recently deleted. You can click **Undo** multiple times to restore additional containers and/or elements. |
Create And Design

<table>
<thead>
<tr>
<th>To Save a container as a content block</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Click on the <strong>Content</strong> palette.</td>
</tr>
<tr>
<td></td>
<td>2. Mouse over a container.</td>
</tr>
<tr>
<td></td>
<td>A list of options appears above the container.</td>
</tr>
<tr>
<td></td>
<td>3. Click <strong>Move</strong> and while still clicking move the container on the canvas.</td>
</tr>
<tr>
<td></td>
<td>4. Drag the container to the <strong>Content</strong> palette and release the container.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Save as Content Block</strong> window opens.</td>
</tr>
<tr>
<td></td>
<td>5. Select either</td>
</tr>
<tr>
<td></td>
<td>• <strong>New Content Block</strong> to save the current message as a new content block.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Override existing content block</strong> to replace a previously saved content block with the new content block.</td>
</tr>
<tr>
<td></td>
<td>If you select this option, you must use the exact same name for the new content block that you did for the old block.</td>
</tr>
<tr>
<td></td>
<td>6. Enter the name for your content block in the <strong>Name</strong> box.</td>
</tr>
<tr>
<td></td>
<td>7. Click <strong>Save Content Block</strong>.</td>
</tr>
</tbody>
</table>

See the boundaries of containers while editing a message

| See the boundaries of containers while editing a message | 1. Click the **Outline Mode** toggle located above the subject line. |

See the CSS class ID for a container.

| See the CSS class ID for a container. | Each Container has a unique ID you can use to target it in the CSS. To find the CSS class ID for a Container: |
|--------------------------------------| 1. Mouse over a container.          |
|                                      | A list of options appears above the container. |
|                                      | 2. Click **Edit**.                  |
|                                      | 3. Scroll to the bottom of the palette. |
|                                      | Here you will find the CSS class for the container. For example: `.container-36469004145`. |

Related Topics

**Video: Intro to The Email Message Editor**

**Elements Palette**

The **Elements** palette is where you can access the tools you need to add content to your message.

To use elements within the palette, simply drag an item from the palette to a container on the canvas then use the settings panel and design menu to add your content. Once on the palette, the element's settings panel can be used to provide the content and design for the element. The options available on the **Content** and **Design** tabs will vary from element to element. In this topic we discuss the **Content** tab options for each element. To read more about the **Design** tab options see **Design (Format) Message Content** on page 87.

Each element has a unique ID you can use to target it in the CSS. To find the CSS class ID for an element, open the element in the palette and scroll to the bottom of the **Design** tab. For example: `.element-36789743892`. 

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<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Text    | Adds text; this includes the ability to insert dynamic code and tags. | When you add a Text element to a message, the ability to write, edit, and style text is provided in the Content tab of the Text Settings panel. In addition to writing text, the Text element can be used to:  
- Add numbered or bulleted lists.  
- Add an inline link by highlighting text, clicking the link button, and entering the link information in the Insert Link pop up window.  
To create a link that sends an email, type mailto: email.address - where email.address is the email address you want mail to be sent to - in the Link Url attribute box. It is important to note that mailto: links can only support email addresses at this time.  
To insert a link to an item you uploaded into Bronto hosting area, click the folder icon in the Link Url field, navigate to and select the item, and then click Insert.  
- Add dynamic code and various message tags to your message by selecting options from the Insert menu. There is no need to offset tags with a space or a comma.  
- Add Special Character using the Insert menu, which provides a keyboard you can use to insert special characters. If you want to use an emoji, you will need to copy and paste the emoji into your email. See the Power of Emojis strategic blog post for more information.  
The Content tab can be used to apply basic font and paragraph styling options. If you want font styling to only apply to some of your text, make sure to highlight it before using the menu to adjust the design.  
The Design tab font design options are applied to all of the text in the element, but will be overridden by any specific design options made using the Content tab. The formatting options in the Content tab are described in more detail in Design (Format) Message Content on page 87. |

[Image of Text Settings panel]
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Image  | Adds an image. | Use the **Image Url** box to add the image. There are three ways an image can be added:  
- Use an image that was uploaded to Bronto by clicking **Browse** to browse to the image.  
To edit an image as you add it to your message, click the checkbox in the corner of image thumbnail then use the **Manage** menu to access the editing options. If you click on the image itself it will be inserted into the message.  
- Copy and paste the image's URL into the box.  
- Insert a tag that will be replaced with an image at the time the message is sent. For more information about using tags see **Add Tags Using The Message Editor** on page 67.  
If you provide a URL in the **Link** box, this link will open when a contact clicks on the image. If you want an image to send an email when a contact clicks on it, type mailto: email.address - where email.address is the email address you want mail to be sent to - in the **Link** attribute box. Currently mailto: links can only support email addresses.  
Images should always include a brief description in the **Alt Text** box so that text is displayed if the image cannot be. |

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<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Button</td>
<td>Adds a button.</td>
<td>When you add a <strong>Button</strong> element you must include a link in the <strong>Link</strong> box on the <strong>Content</strong> tab. This link is the webpage that will open when a contact clicks the button. If you want a button to send an email when a contact clicks on it, type <code>mailto: email.address</code> - where <code>email.address</code> is the email address you want mail to be sent to - in the <strong>Link</strong> box. It is important to note that <code>mailto:</code> links can only support email addresses at this time. The <strong>Insert</strong> menus can be used to add tags or special characters to your button <strong>Text</strong> or <strong>Link</strong>. For more information about tags, see Add Tags Using The Message Editor on page 67.</td>
</tr>
</tbody>
</table>

The table above provides a detailed description of the **Button** element in the context of a contact management system. It highlights the importance of including a link in the **Content** tab when adding a button, and the specific syntax for sending an email through a button. It also emphasizes the limitation of `mailto:` links to email addresses at the time of publication. The **Insert** menus are mentioned as a feature to add tags or special characters to the button's text or link, with a reference to a page for further guidance on using tags.
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Text Grid   | Adds a table.        | By default, the **Text Grid** element adds a borderless table with three rows and three columns. The **Text Grid** element is meant to be used when you want to include a table with text in your email and is not meant to be used as a message design element. Use Containers for your message layout needs. You can add a border to a table using the **Border** option in the Design menu. Initially all of the cells in the table are of equal size, but cells expand as you add content to them using the **Text Grid Settings** panel. In the **Add Content** menu, click  
  • + to add a row or column  
  • x to delete a row or column  
  A table can have up to six columns and an unlimited number of rows. The **Insert** menu can be used to add tags or special characters to your table text. For more information about tags, see Add Tags Using The Message Editor on page 67.  
  To create a link that sends an email, type `mailto: email.address` - where `email.address` is the email address you want mail to be sent to - in the **Link Url** attribute box. It is important to note that mailto: links can only support email addresses at this time.  
  You cannot drag other elements into a **Text Grid**. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
<td>Provides the ability to include your custom HTML in a message.</td>
<td>If you created HTML in another program, such as DreamWeaver, that you want to include in your message you can copy and paste it into the box on the Add HTML menu. If you want to apply CSS to the HTML, use the Edit CSS option on the Settings Palette on page 80 to apply a custom CSS to your message. You can resize both the HTML and CSS editor windows by increasing or decreasing the size of the palette. <strong>Note:</strong> You cannot apply custom CSS if you are creating a content tag. This is only available if you are creating a message in the Email Message Editor.</td>
</tr>
<tr>
<td>Webpage</td>
<td>Pulls the HTML from a webpage into a site.</td>
<td>When you add a Webpage element, the page is included in the message. When a contact clicks on the page, they are taken to that URL. This is useful if you want to include a sales news letter or print ad to your email. <strong>Note:</strong> For security reasons, we will remove all JavaScript from the web page before it is used in an email message.</td>
</tr>
<tr>
<td>Social</td>
<td>Gives you the option to add Facebook, Twitter, or LinkedIn share buttons or to add a Facebook Like Button.</td>
<td>A social button allows contacts to share the email to their social media accounts.</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Spacer</td>
<td>Allows you to specify the height of a container without adding other content to it.</td>
<td>The <strong>Spacer</strong> element can be used to increase or decrease the use of white space in your message. Effective usage of white space helps to create more compelling messages. The maximum spacer height is 100 (px, em, rem, mm, or vh). Even though you only add the <strong>Spacer</strong> element to a single box, an entire container is effected.</td>
</tr>
<tr>
<td>Cart/Order Loop</td>
<td>Adds the beginning and ending tags for a cart loop. You still need to add the cart/order tags you want to include in the loop between the <strong>Begin Cart/Order Loop</strong> and <strong>End Cart/Order Loop</strong> tags.</td>
<td>You can add the cart/order tags to the loop by dragging a <strong>Text</strong> element onto the canvas and placing it after the <strong>Begin Cart/Order Loop</strong> tag but before the <strong>End Cart/Order Loop</strong> tag. Then in the <strong>Text Settings</strong> menu, click <strong>Insert</strong> and select <strong>Cart/Order tag</strong> to select your tag. You can only select one tag at a time, but you can continue to select and add tags to the same <strong>Text</strong> element. For more information see <a href="#">Add Cart/Order Loops Using The Message Editor</a> on page 69. You can only have one loop per <strong>Container</strong> box.</td>
</tr>
<tr>
<td>API Loop</td>
<td>Adds the beginning and ending tags for an API loop. You still need to add the API content you want to include in the loop between the <strong>Begin API Loop</strong> and <strong>End API Loop</strong> tags.</td>
<td>You can add the API message tags to the loop by dragging a <strong>Text</strong> element onto the canvas and placing it after the <strong>Begin API Loop</strong> tag but before the <strong>End API Loop</strong> tag. Then add the API message tags you want to include in the loop by typing them into the <strong>Add Content</strong> box in the <strong>Text Settings</strong> panel. For more information see <a href="#">API Loop Tags</a> on page 163. You can only have one loop per <strong>Container</strong> box.</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rec Loop</td>
<td>Adds the beginning and ending tags for a Recommendations loop which allows you to use a recommendation to dynamically populate product data into your email. You still need to add the product placeholders for the product fields you want to include for each product between the <strong>Begin Rec Loop</strong> and <strong>End Rec Loop</strong> tags.</td>
<td>For detailed information about how to use a Rec Loop see Add Recommendations In The Email Message Editor on page 76.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When you add multiple Premium Recommendations to a message a customer will only see results for the first 3 Rec Loops (that have results). We don't limit the number of Rec Loops that can be included in the message to support adding different Rec Loops when working with dynamic content.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>By default, when a Rec Loop does not return results the container the Rec Loop is in will be hidden in the sent message. On the <strong>Design</strong> tab, you can turn this feature on or off using the <strong>Hide entire container if loop is empty</strong> box.</td>
</tr>
<tr>
<td>MyBuys (Magnetic) App Integration</td>
<td>Adds MyBuys (Magnetic) content to an email.</td>
<td>Once you have the MyBuys (Magnetic) recommendation fully configured, you can insert a MyBuys (Magnetic) Recommendation into your message. For more information about setting up MyBuys (Magnetic), see MyBuys (Magnetic) Connection on page 1298</td>
</tr>
</tbody>
</table>
|                             |                                                                                                                                                                                                                                                                                                                                                                                                    | When you add a MyBuys (Magnetic) element, you need to  
1. Select a **Message Type**.  
2. Enter the **Recommendation Number**.  
3. Enter the **Product Codes**.  
4. Enter the **Category Key Codes**.  

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<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baynote App Integration</td>
<td>Adds Baynote content to an email.</td>
<td>Once you have the Baynote Recommendation fully configured, you are ready to insert a Baynote Recommendation into your message.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For more information about setting up Baynote, see Baynote Connection on page 1292.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When you add a Baynote element, you need to</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Select the <strong>Layout</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This allows you to change the format of the image that is generated by Baynote. Test your message after trying out different options to be sure you are pleased with the layout.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Choose the size (<strong>Small</strong> or <strong>Large</strong>) of the recommendation you wish to use.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Enter the <strong>Recommendation Number</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This allows you to select which recommendation number (or recommendation index as referred to by Baynote) you wish to receive and is normally used when you want to show several recommendations for one product. The first recommendation has an index of 1, the second recommendation is set to 2, and so on.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Enter the <strong>Attribute Filter</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This allows you to override the setting you set when configuring the Baynote Connection.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Enter the <strong>Product URL</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. Enter the <strong>Guide Name</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This allows you to override the setting you set when configuring the Baynote Connection.</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Coupon Manager</td>
<td>Adds Coupon Manager content to an email</td>
<td>If you use Coupon Manager, you can use this element to add your coupons right into your email. Simply drag the Coupon Manager element to the canvas and click the Get Image Tag button associated with the coupon you want to use. For more information about Coupon Manager, see <a href="https://appcenter.bronto.com/apps/coupon-manager">https://appcenter.bronto.com/apps/coupon-manager</a>.</td>
</tr>
</tbody>
</table>

### Related Topics

**Video: Intro to The Email Message Editor**

**Related Topics**

- Message Tags on page 149

There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

### Common Elements Palette Tasks

Like the Containers palette, the Elements palette has a menu you can use to complete common tasks, like editing an element.

Once an element is on your canvas you can:

<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
</table>
| Move the element  | 1. Mouse over an element. A list of options appears below the element.  
2. Click Move and while still clicking move the element on the canvas.  
3. Drag the element until it is in the place you want it and then “unclick” to place it on the canvas.                                                                                                                                                                                                                                                                                                                                                      |
| Edit the element  | 1. Mouse over an element. A list of options appears below the element.  
2. Click Edit.  
3. Design the element or edit the element’s settings. For more information, see Design (Format) Message Content on page 87 or Elements Palette on page 57.  
You can click the Reset button in the editing panel to revert all of the settings back to when you opened the element or container.  
Note: There is no Reset button for API Loop, Cart Loop, or Text Grid.                                                                                     |
<table>
<thead>
<tr>
<th><strong>To</strong></th>
<th><strong>Do This</strong></th>
</tr>
</thead>
</table>
| Copy the element | 1. Mouse over an element.  
A list of options appears below the element.  
2. Click **Copy**.  
A copy of the element is added to the canvas below the copied element. |
| Delete an element from the message | 1. Mouse over an element.  
A list of options appears below the element.  
2. Click **Remove**.  
After you delete an element, you can add the element back to the message by clicking the **Undo** button. **Undo** restores the container or element that was most recently deleted. You can click **Undo** multiple times to restore additional containers and/or elements. |

**Add Tags Using The Message Editor**

With the new message editor you can quickly add field, special, content, RFM, product, and cart/order tags to your messages using the **Insert** menu. You also have the option of adding tags to the subject line of your message using the drop down arrow to the right of the subject line.

Instead of being added directly to the canvas, tags are included in messages as part of an element. For example, tags can be added as items in a **List** element, or used as text or a link for a **Button** or **Image** element. This allows for maximum flexibility when you're using a tag.

The **Insert** menu can be used to add a tag to an element. The menu is accessed from the settings panel for an element after you have added it to the canvas, and is available for all elements except the **Spacer** and **HTML** elements. The **Insert** menu contains a list of all of the tags you can add to a message including:

- **Field Tags**: The categories of information you have stored for your contacts. Example: `%%firstname%%` For more information, see Field Tags on page 151.
- **Special Tags**: The default, Bronto-provided tags. Example: `%%!unsubscribe_url%%` For more information, see Special Tags on page 152.
- **Content Tags**: Reusable blocks of content you have created using the Content > Content Tags page in Bronto. Example: `%%@newitems%%` For more information, see Content Tags on page 140.
• RFM Tags: The RFM metrics that have been collected for a contact. Example: \%\%rfm_newest_order_date\%\% For more information, see RFM Field Tags on page 152.

• Cart/Order Tags: Data collected about shopping carts, if you use the Cart Recovery app, or orders. Example: \%\%$cart.discount\%\% For more information, see Add Cart and Order Data To A Message on page 175.

• Product Tags: The product fields that you have imported into Bronto. Example: \%\%$product.placeholder.field\%\% For more information, see Product Tags on page 170.

• Webform Link Tags: A link to a webform that can be added to your message. For more information about webforms, see Webforms on page 204.

Note: The Insert menu also includes Special Character, which provides a keyboard you can use to insert special characters.

When you select an option from the list, a menu that contains all of the related tags you have created in your account is displayed. Simply select a tag from this menu and the tag is added to your message. When the message is sent (or sometimes when the message is scheduled) the content of the tag will be replaced with content. For example, if you have a field called firstname used to store the first name of your contacts, and you select this field tag in your message, then the \%\%firstname\%\% field tag will be replaced by the value contained in the firstname field for the contact receiving the message. For more information about how tag replacement works, see Message Tags on page 149.

If you don't want to use the Insert menu, you can always add tags by hand coding them into your message.

Tip: Any field used in a message must contain less than 1 MB of data.

To add a tag to a message using the message editor:

1. Open a message in the message editor.

2. Either
   • Add an element to the message by dragging it from the palette to the canvas.
   • Edit an existing element by mousing over it and clicking the green Edit button.

3. In the Settings panel, click the Insert button. A list of tag options is displayed.

4. Click on the name of the tag you want to use. For example, if you want to include the shipping date for an order, click Cart/Order tag.

   A new window with a list of the available tags is displayed.

5. Click on the tag you want to use. For example, click on Shipping Date.

6. Click the Insert Tag button.

   In our example, we would click Insert Cart/Order Tag.

   The tag is added to your message.

7. Optional: If you added a product tag that uses an arbitrary placeholder to your message, you must map the product placeholder to a Product ID. Either:

   Note: If your product placeholder is a contact or API message field, you do not need to map the placeholder.

   • Map placeholders when you schedule a message. For more information see Map Product Placeholders When You Schedule A Message on page 173.
   • Map the placeholders to a default Product ID using the editor. For more information see the Set Product Defaults entry in the Settings Palette on page 80 table.

   To watch a video about using product tags in the message editor, see Add Product Data to Emails Using the Email Message Editor.

8. Finish your message.
When the message is sent, the tag is replaced with the content that is relevant to each contact who receives the message.

Note: A few tags are replaced at the time the message is scheduled. For more information, see Message Tags on page 149.

Related Topics
Message Tags on page 149
There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

Related Topics
Advanced Styling For Browse Recovery Messages on page 1475
You can use product tags and dynamic code in different ways to style your Browse Recovery messages.

Add Cart/Order Loops Using The Message Editor
A cart/order loop allows you to read through the array of line items associated with a shopping cart or an order, and dynamically insert that data into an email message.

For more information about the purpose and syntax of cart loops, see Cart Loop Tags on page 176.

To add a cart/order loop to a message using the message editor:

1. Open a message in the message editor.
2. Click on the Elements palette.
3. Scroll to the Advanced area and drag the Cart/Order Loop element to the canvas.

4. Place the element on the canvas.

The Begin Cart/Order Loop and End Cart/Order Loop tags are added to the canvas.

5. In the Elements palette, scroll to the Basic area and drag the Text element to the canvas.

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

© Oracle 2018 | 69
6. Drop the Text element between the Begin Cart/Order Loop and End Cart/Order Loop tags. The Text Setting panel is displayed.

7. In the Add Content box, add the cart loop tags you want to use for your message.

   For example, if you want to include the name of items in a cart, add %$cart.item.name%%. For more information about the availability of and syntax for cart loop tags, see Cart Loop Tags on page 176.

8. Optional: If you want to use product data with your cart tags, add the cart with product tags to the Add Content box.

   For example, the syntax to pull in a product title for the cart items is %$cart.item.product.title%%. For more information about this, see Include Product Data In Cart and Order Tags on page 174.

9. Repeat steps 7 and 8, as necessary, until you have added all of the relevant tags to the loop.

   There is no need to include a space or any kind of special character between each tag. Just make sure the tags are correctly formatted or Bronto will not be able to properly read the tag during message send.

10. Finish, save, and schedule your message.

    When the message is sent, the cart/order loop tags are replaced with the content that is relevant to each contact who receives the message.

    Note: A few tags are replaced at the time the message is scheduled. For more information, see Message Tags on page 149.

Related Topics
Cart and Order Tags on page 174
Cart and order tags allow you to dynamically add shopping cart or order data to your messages.

Add Links In A Message (Email Message Editor)
You can add links to your messages by including a link as an attribute of an Image, Button, Text, or Text Grid element.

The following table explains how to add a link to each element. For additional information about how to edit or design each element see Elements Palette on page 57 and Design (Format) Message Content on page 87.
<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
</table>
| Add a link in a Text element                    | 1. Open the element for editing.  
2. Select the text you want to use for the link text by highlighting it.  
3. Click the link button.  
4. Either  
   - Enter the link address in the **Link Url** box.  
   - Click the folder icon, navigate to an item you uploaded into Bronto, and click **Insert** if you want to insert a link to content you uploaded into Bronto's hosting area.  
5. If you want to make this link a deep link, select the **Create Deep Link for Mobile Apps** checkbox.  
   - **Note:** This option is only available if you have Deep Linking enabled.  
6. If you want to use a tag in your link, select the type of tag from the **View Tag Options** list, click on the tag, and click **Insert Tag**.  
   - For product tags only, you will also need to provide a placeholder.  
7. Add a link title in the **Link Title** box.  
   - Link titles can be used to narrow down the metrics for a link. For example, you may use the same link several times in a message and adding a title would allow you to see which usage of the link was the most clicked on.  
8. Click **Insert Link**. |
<table>
<thead>
<tr>
<th><strong>To</strong></th>
<th><strong>Do This</strong></th>
</tr>
</thead>
</table>
| Add a link to a Button | 1. Open the element for editing.  
2. Either  
   - Enter the link address in the Link Url box.  
   - Click the folder icon, navigate to an item you uploaded into Bronto, and click **Insert** if you want to insert a link to content you uploaded into Bronto's hosting area.  
3. If you want to make this link a deep link, select the **Create Deep Link for Mobile Apps** checkbox.  
   - **Note**: This option is only available if you have Deep Linking enabled.  
4. If you want to use a tag in your link click the **Insert Tag** button, select the type of tag, click on the tag, and click **Insert Tag**.  
   You will also need to provide a placeholder for product tags.  
5. Add a link title in the **Link Title** box.  
   Link titles can be used to narrow down the metrics for a link. For example, you may use the same link several times in a message and adding a title would allow you to see which usage of the link was the most clicked on.  
6. Click **Done**. |
<table>
<thead>
<tr>
<th><strong>To</strong></th>
<th><strong>Do This</strong></th>
</tr>
</thead>
</table>
| Add a link to an Image | 1. Open the element for editing.  
   2. Either  
   • Enter the link address in the Link Url box.  
   • Click the folder icon, navigate to an item you uploaded into Bronto, and click Insert if you want to insert a link to content you uploaded into Bronto's hosting area.  
   3. If you want to make this link a deep link, select the Create Deep Link for Mobile Apps checkbox.  
   Note: This option is only available if you have Deep Linking enabled.  
   4. If you want to use a tag in your link click the Insert Tag button, select the type of tag, click on the tag, and click Insert Tag.  
   You will also need to provide a placeholder for product tags.  
   5. Add a link title in the Link Title box.  
   Link titles can be used to narrow down the metrics for a link. For example, you may use the same link several times in a message and adding a title would allow you to see which usage of the link was the most clicked on.  
   6. Click Done. |
<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
</table>
| Add a link in a Text Grid | This only removes the label from this list. The label will maintain its association with any other lists it is currently associated with.  
1. Open the element for editing.  
2. Select the text you want to use for the link text by highlighting it.  
3. Click the link button.  
4. Either  
   • Enter the link address in the **Link Url** box.  
   • Click the folder icon, navigate to an item you uploaded into Bronto, and click **Insert** if you want to insert a link to content you uploaded into Bronto’s hosting area.  
5. If you want to use a tag in your link, select the type of tag from the **View Tag Options** list, click on the tag, and click **Insert Tag**.  
   You will also need to provide a placeholder for product tags.  
6. Add a link title in the **Link Title** box.  
   Link titles can be used to narrow down the metrics for a link. For example, you may use the same link several times in a message and adding a title would allow you to see which usage of the link was the most clicked on.  
7. Click **Insert Link**. |

**Related Topics**

**Use Branch for Deep Linking for Mobile Apps** on page 1353  
If you have a native mobile app, deep links are URLs that direct contacts to specific content inside your app. Enabling deep linking by Branch allows you to convert normal links in your email to deep links. Customers who click a deep link in the email from a mobile device are directed to a specific page in your mobile app or to the app store if the app is not installed.

**Related Topics**

**Add Deep Links to Messages** on page 74  
You can add deep links to messages after you have set up your account with Branch.io and enabled deep linking in Bronto’s settings, including adding the deep linking tracking domain.

**Add Deep Links to Messages**  
You can add deep links to messages after you have set up your account with Branch.io and enabled deep linking in Bronto’s settings, including adding the deep linking tracking domain.

**Email Message Editor**  
In the Email Message Editor, you can add a deep link when you add a Text element, an Image element, or a Button element.  
To add a deep link to these elements, select the **Create Deep Link for Mobile Apps** checkbox when you create a link. You can make deep links for static and dynamic content.
HTML

You can add deep links with HTML by adding `deeplink="true"` to the link in your message.

For example: `<a href= "links.example.com" deeplink="true">Link Text</a>`

API

To use the deep linking feature through the API, use the `addMessages` SOAP call. For links in a message to be deep links, you need to modify the messages you send to include the deep linking indicator. In any anchor tag, you need to add the attribute `deeplink="true"` in the message html content.

For example:

```php
/**
 * This script will add an HTML message with some basic HTML content.
 * @copyright Copyright (c) 2011 Bronto Software (http://www.bronto.com)
 */
$client = new SoapClient('https://api.bronto.com/v4?wsdl', array('trace' => 1,
'features' => SOAP_SINGLE_ELEMENT_ARRAYS));

try {
    // Add in a valid API token
    $token = "ADD API TOKEN HERE";
    $sessionId = $client->login(array('apiToken' => $token))->return;
    $session_header = new SoapHeader("http://api.bronto.com/v4",
'sessionHeader',
array('sessionId' => $sessionId));
    $client->__setSoapHeaders(array($session_header));

    // Be sure to replace the example subject and content
    $MessageContentObject = array('type' => 'html',
'subject' => 'Example Subject Line',
'content' => '<h1>Title of Page</h1> A link to our <a
href="mysite.com/about" deeplink="true">About us</a> page. <p>Example
description.</p>
');

    // Give the message a valid name
    $message = array('name' => 'Example Message Name',
'content' => $MessageContentObject);

    print "Adding the message\n"
    $write_result = $client->addMessages(array($message)
)->return;

    if ($write_result->errors) {
        print "There was a problem adding the message:\n"
        print_r($write_result->results);
    } else {
        print "The message has been created. Id: " . $write_result->results[0]->id . "\n";
    }
} catch (Exception $e) {
    print "uncaught exception\n"
    print_r($e);
}
```
Use Branch for Deep Linking for Mobile Apps on page 1353
If you have a native mobile app, deep links are URLs that direct contacts to specific content inside your app. Enabling deep linking by Branch allows you to convert normal links in your email to deep links. Customers who click a deep link in the email from a mobile device are directed to a specific page in your mobile app or to the app store if the app is not installed.

Add Link In A Message (Email Message Editor) on page 70
You can add links to your messages by including a link as an attribute of an Image, Button, Text, or Text Grid element.

Add Recommendations In The Email Message Editor
You can add a recommendation to your messages using the Rec Loop element.

The Rec Loop element makes it easy to quickly add a recommendation to your message. Simply add a single column container in the location you want your products to appear, drag the Rec Loop into the container, configure the settings for the loop, and then add your product placeholders between the opening and closing loop tags.

Note: If you are using the WYSIWYG editor, you will need to hand code your recommendations loop into your messages. For more information about the proper syntax for Recommendations tags, see Recommendation Messages on page 1429.

When you add multiple Premium Recommendations to a message a customer will only see results for the first 3 Rec Loops (that have results). We don't limit the number of Rec Loops that can be included in the message to support adding different Rec Loops when working with dynamic content.

To add a recommendation to a message using the email message editor:

1. If necessary, add a reference product to your message using product tags.
   An easy way to tell if you need a reference product in your message is to preview the recommendation you plan to use. If the preview asks for a product reference before it can return results, then you need to supply a reference product in your message.

2. Drag the Rec Loop into a single-column container on the canvas.

3. In the Rec Loop palette:
   a) Enter a Loop Name.
      The loop name must be alphanumeric.
   b) Select the recommendation you want to use from the Recommendation List.
   c) Enter the recommendation number you want this list of recommendations to start with in the Starting Point box.
      Typically your starting point will be 1, but if you plan on including multiple loops using the same recommendation in your message, you may want to start with a different number in order to avoid duplicate recommendations.
   d) Enter the number of product recommendations you want to provide in the # of Results box.
      For standard recommendations you can include up to 100 products. For premium you can include up to 20.
      The combination of the # of Results and Iterations Per Row will inform the design of your message. For example, if you set both to 3 you will have a single row of content but if you select 9 results and 3 iterations, you will have a block of content. Which is better depends on your audience and the purpose for the message.
   e) Optional: If you want to pad the recommendation block:
      • Click Design.
      • Select a px width from the Padding list.
   f) Optional: If you want to automatically hide the container if your Rec Loop is empty, click the Hide entire container if loop is empty box to deselect it.
You should leave this selected, i.e. hide the empty container, if the only content you have in the container is the Rec Loop. However, if there's other content in the container, such as text, it may be best to make sure this option isn't selected so the other content is still displayed.

g) Click Done.

4. Add product tags to the loop:

The elements/product tags you add to the Rec Loop will represent the information about the product that is displayed in the email.

   a) Drag an element into the loop.
   
   For example, if you want to add an image, drag the Image element between the opening and closing loops tags.

   b) Add a product tag to the element.

   The Insert menu can be used to add product tags to elements. For more information see Add Tags Using The Message Editor on page 67. When the product tag is added to the loop it will have a syntax similar to %$product.(?).title%%. Do not change the default syntax or the recommendation will not populate properly.

   c) Design the element.

   Design options vary from element to element. Remember, you are only designing the appearance of the product information. For example, the color of a button or size of the description text. The number of products and products per row are determined by your loop settings. Keep the placement of multiple products in a row in mind as you design your elements.

   d) Continue to add elements and product tags until you have added each product field you want represented for a recommendation.

   You only need to add each product field (element) once per loop in order for it to be present for all product recommendations.

   Note: If you want to specify a particular product in the array of recommendations, you can use the product tag outside of the loop. The syntax would be something like this: %$product.($app.rec.recloop1.productIds._1).title%%, where title is any product attribute. You can also use this syntax in the subject line.

   Related Topics
   Advanced Styling For Browse Recovery Messages on page 1475

   You can use product tags and dynamic code in different ways to style your Browse Recovery messages.

Content Palette

The Content palette is where you can access and save templates that you can use to build your messages.

Content templates are divided into 4 areas:
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Tags</td>
<td>Are blocks of pre-designed content you can insert into your message.</td>
<td>When you insert a content tag you can select from a list of the content tags you already designed using the Content &gt; Content Tags pages. There are two ways you can insert a content tag:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Dynamic Tags</strong>: If you insert a tag dynamically then the tag will appear as dynamic code in your message and the tag retains its connection to the original content tag. The dynamic code will look like <code>%%@tagname%%</code>. When you send a message, the dynamic tag is replaced with the content tag's contents. This means that any updates you make to the content tag with the content tag editor will be reflected in the sent message.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Static Tags</strong>: When you use a static tag, the contents of the tag are pulled into the message but are no longer connected to the original content tag. Think of static tags like you are copying and pasting content. Once it is in the message, you can edit the content tag within the email message editor like any other content in the message.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can use either of these methods for drag and drop or legacy WYSIWYG content tags. However, we recommend you use drag and drop content tags with the email message editor for better responsive design support.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When you save a message as a content tag all of the associated dynamic content and code settings are saved also. If you make changes and want to save them as a content tag, you can save your updates as a new content tag or overwrite the old content tag by saving your new email with the same content tag name.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For more information about using content blocks, see Use Content Tags In The Email Message Editor on page 79.</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
<td>-------</td>
</tr>
<tr>
<td>Headers</td>
<td>Is a list of the headers you have created in Bronto using the Content &gt; Headers &amp; Footers page.</td>
<td>You can select any header from the list to add it to your message. The content of the header cannot be edited from the message editor. For more information about creating and editing headers see Headers And Footers on page 142. To add a header 1. Open the Content palette. 2. Scroll to the Headers &amp; Footers panel. 3. Select a header from the list. If you do not want a header in your message, make sure None is selected.</td>
</tr>
<tr>
<td>Footers</td>
<td>Is a list of the footers you have created in Bronto using the Content &gt; Headers &amp; Footers page.</td>
<td>You can select any footer to add it to your message. The content of the footer cannot be edited from the message editor. To add a header 1. Open the Content palette. 2. Scroll to the Headers &amp; Footers panel. 3. Select a footer from the list. For more information about creating and editing footers see Headers And Footers on page 142. If you do not want a footer in your message, select None.</td>
</tr>
</tbody>
</table>

Related Topics
Headers And Footers on page 142
You can create headers and footers that can be used across multiple messages.

Related Topics
Content Tags on page 140
Content tags allow you to create reusable "blocks" of content that you can use in the body, header, and footer of your messages.

Use Content Tags In The Email Message Editor
Content tags allow you to pre-design blocks of content that you can use in your messages.

A content tag is similar to an email template. You can save an entire message as a content tag or you can design content tags using the content tag editor. Content tags can be used again and again in your messages.

To use content tags in the message editor:
1. Open a message.
2. To add a content tag to your message:
   a) Click on Content to open the palette.
      The Content Palette with content tag options is displayed.
Create And Design

b) Click on **Insert Content Tag**.

The **Insert Content Tag** window opens.

c) Click on the content tag you want to use.

We recommend using content tags designed with the drag and drop content tag editor for better responsive design support.

d) Select either

- **Dynamic Tag** to add the content tag to your message but still retain the link to the original content tag. This means any updates you make to the tag using the content tag editor will automatically be reflected when a message is sent. When you insert a content tag dynamically, the appearance of the content tag will look similar to any other dynamic tag you can use in a message: `%%@tagname%%`.
- **Static Tag** to add the content tag to your message without retaining a link to the original content tag. When you do this the contents of the content tag are added to your message and you can edit it like any other part of the message.

e) Click **Insert Content Tag**.

3. To save a message as a content tag:

a) Click on **Content** to open the palette.

b) Click on **Save Message as Content Tag**.

The **Save as Content Tag** window opens.

c) Select either

- **New content tag** to save the current message as a new content tag.
- **Override existing content tag** to replace a previously saved content tag with the new content tag.

If you select this option, you must use the exact same name for the new content tag that you did for the old content tag.

d) Enter the name for your content tag in the **Name** box.

e) Click **Save & Close**.

**Settings Palette**

The **Settings** palette allows you to manage your message at a high-level.
This includes providing message design options, the ability to set default product mappings, and to globally find and replace message content.

You can click the Reset button in the editing panel to revert all of the settings back to when you opened the element or container.

Note: There is no Reset button for Set Product Defaults, Find/Replace, or Clear Canvas.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Message Design  | Gives you the ability to set global style options for the entire message. | The formatting of elements in a message always defaults to the most specific, or lowest, defined settings. For example, you have a three column container. One of the cells in the container has a text element.  
• The Message Design Setting for Background Color is blue.  
• The Container Design Setting for Background Color is green.  
• The Text Settings for Background Color is purple  
In your message, the cell that contains the text is purple, the other two cells in the container have a green background, and the background for the rest of your message is blue. To set the message design:  
1. Click on the Settings palette.  
2. Click on Message Design.  
3. Adjust the design settings for the message. For more information about each design option, see Design (Format) Message Content on page 87. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Find/Replace    | Opens a Find/Replace window that you can use to find or find and replace content in your messages. | Find/Replace will search all of the text in your message, including text used on buttons or text in lists or tables. To use find/replace:  
1. Click on the **Settings** palette.  
2. Click on **Find/Replace**.  
3. Enter the text you want to find in the **Find**: box.  
4. Select **Yes** or **No** to indicate if you want your search term to be case sensitive.  
5. If you want to replace the text, enter the replacement word or phrase in the **Replace**: box.  
6. Click **Find** to find all instances of the search term.  
7. Click **Find/Replace** to replace all instances of the search term. |
| Clear Canvas    | Completely deletes everything in the message including elements, containers, and settings. | When you clear the canvas you are resetting the message back to its initial state, which is empty. Clearing the canvas does not remove any changes you've made to the subject line, only all of the content on the message canvas. To clear the canvas:  
1. Click on the **Settings** palette.  
2. Click **Clear Canvas**.  
3. Click **Clear Content**. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit CSS</td>
<td>Allows you to apply an external CSS to the message.</td>
<td>Applying a CSS is a useful option if you want to consistently use the same style settings across several different messages. When you use a CSS, any settings you adjust in the message are taken into consideration based on the CSS settings. This means, styling defaults to the lowest level setting whether that setting was defined in the CSS or in the message settings. To edit CSS: 1. Click on the Settings palette. 2. Click Edit CSS. 3. Copy the CSS from your document. 4. Paste the CSS into the Edit CSS box. You can resize the CSS editor window by increasing or decreasing the size of the palette. 5. Click Done. If a setting is defined in the CSS and also defined in the message editor, you may see some unpredictable results. For more information about using CSS, see Use CSS To Style Your Message In The Email Message Editor on page 85</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Set Product Defaults      | Where you can map products to the placeholders used in product tags.         | ❗️ **Note:** You can only use product data in your message if you have imported product data into Bronto. For more information see [Products](#). When you map a default product to a product placeholder this product will be used every time this message is sent, unless you specify a different product placeholder mapping at the time you schedule the message. To set product placeholder defaults:  
1. Click on the **Settings** palette.  
2. Click **Set Product Defaults**.  
   If you have already added product tags to your message, the placeholders for the tags are displayed.  
3. Enter the Product ID you want to map the placeholder to in the **Default Product ID** box.  
4. If you do not see the placeholder you want to map, click **Add Placeholder**, enter just the product placeholder text in the **Product Placeholder** box, and then enter the Product ID you want to map the placeholder to in the **Default Product ID** box.  
5. Click **Save & Close**.  
A product placeholder mapping made on the **Schedule Message** page will always override a default product placeholder mapping that was made using the message editor. For more information, see [Map Product Placeholders When You Schedule A Message](#) on page 173.
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Metadata</td>
<td>Allows you to add metadata tags using the Open Graph protocol to your message.</td>
<td>When you add metadata, you must add both a property and content for each tag. Because Bronto uses the Open Graph protocol for metadata, the property must be appended with og:. To add metadata: 1. Click on the <strong>Settings</strong> palette. 2. Click <strong>Message Metadata</strong>. 3. Click <strong>Add Metadata Tag</strong>. 4. Enter the meta property in the first box. For example, add <strong>og:image</strong> for an image. 5. Enter the content in the second box. For example, provide the URL for the image. 6. Click <strong>Done</strong>. The metadata will be included in the html head of the message. For more information about metadata tags and the Open Graph protocol, see <a href="http://ogp.me/">http://ogp.me/</a>.</td>
</tr>
<tr>
<td>Sync Subjects</td>
<td>If this box is checked, both the text version and the HTML version of the message will use the subject line for the HTML message.</td>
<td>Because the message editor provides the ability to view and edit a message in both HTML and text view, it is possible that there may be two different subject lines for the message, or someone might forget to write a subject line at all for one of the versions of the message. Generally, you will want the subject lines to match, so this box is checked by default to avoid a message going out with an inaccurate or outdated subject line. To sync the subject lines: 1. Click on the <strong>Settings</strong> palette. 2. Check the <strong>Sync Subjects</strong> box. However, it is possible you may want the text and HTML versions of a message to have different subject lines. If this is the case, simply uncheck this box.</td>
</tr>
</tbody>
</table>

**Use CSS To Style Your Message In The Email Message Editor**
You can apply a Cascading Style Sheet (CSS) if you want to consistently use the same style settings across several different messages.
When you use a CSS, any settings you adjust in the message are taken into consideration based on the CSS settings. This means that styling defaults to the lowest level setting, whether that setting was defined in the CSS or in the message settings.

You can target a message, container, column, or element in the CSS. Containers and elements have a specific ID you can target in the CSS.

To find the ID for an Element or Container:

1. Open the Element or Container in the palette.
2. Click Design.
3. Scroll down to the bottom and find CSS Class.

   Note: Be sure to use the full class; for example: .container-36469004145

To edit the CSS:

1. Click on the Settings palette.
2. Click Edit CSS.
3. Copy the CSS from your document.
4. Paste the CSS into the Edit CSS box.
   You can resize the CSS editor window by increasing or decreasing the size of the palette.
5. Click Done.

If a setting is defined in the CSS and also defined in the message editor, you may see some unpredictable results.

Table 1: How to use the CSS class to style your message

You can use the following CSS classes to style your messages in the Email Message Editor

<table>
<thead>
<tr>
<th>CSS Class</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>.message</td>
<td>The .message class does not have an ID because the styling will apply to the entire message.</td>
<td>.message { font-style: italic; font-weight: bold; }</td>
</tr>
<tr>
<td>.container</td>
<td>Containers have a specific ID and you can target a specific .container class to have it look a particular way.</td>
<td>.container-36469004145 { color: green; }</td>
</tr>
</tbody>
</table>
### Create And Design

<table>
<thead>
<tr>
<th>CSS Class</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>.column</td>
<td>You can use the .column class in two ways. You can target a specific column in a specific container, or you can target a certain column in any multi-column container in the entire message. To target a column, use .column-#, where # represents the column number 1 through 6, from left to right.</td>
<td>To target a column in a specific container:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To target a certain column number in the entire message:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For this example, for every multi-column container, the second column will be green.</td>
</tr>
<tr>
<td>.element</td>
<td>Elements have a specific ID and you can target a specific .element class to have it look a particular way.</td>
<td>.element-36469004145 { font-style: bold; }</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Design (Format) Message Content

The **Design** menus are how you can format all of the containers and elements in your message.

The **Design** menu is displayed when you add or edit an element on the canvas, edit a container, or use the **Message Design** button on the **Settings** menu.

A message's design settings always default to the most specific design. If you apply the same design setting to an element, a container, and import a CSS for a message, the element design will respect the design settings that were set at the element level. For example, if you make the **Background Color** for a container blue and give the text in the middle cell of that container a green **Background Color**, the left and the right cell in the container will have the blue background, but the middle cell will have the green background you assigned to the **Text** element. For **Text** elements, any font design set in the **Content** tab will supersede **Design** tab settings.

You can click the **Reset** button in the editing panel to revert all of the settings back to when you opened the element or container.

The options on the **Design** menu differ between elements. Each design option is described below and includes a list of the elements the option applies to.
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alignment</td>
<td>Controls the horizontal spacing of the element within the container. When you apply an alignment to a container, it is applied to all of the elements in the container. You can only choose one of the alignment settings available in the list. For more information about alignment, see <a href="http://www.w3schools.com/cssref/pr_text_text-align.asp">http://www.w3schools.com/cssref/pr_text_text-align.asp</a>.</td>
<td>• Button</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Containers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HTML</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Image</td>
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<td></td>
<td></td>
<td>• Social</td>
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<td></td>
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<td>• Table</td>
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<td></td>
<td></td>
<td>• Text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Webpage</td>
</tr>
<tr>
<td>Note: When editing a <strong>Button</strong> element, alignment adjusts the alignment of the text on the button. If you want to align a button in relation to the position of the button in the container, then you should edit the alignment for the container from the <strong>Container Design</strong> menu or use padding to adjust the position of the button in relation to the container box.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Background Color</td>
<td>Applies the selected color to the container cell the element is in. You can either select a color by clicking on the color picker, or you can enter the CSS color value if you know the exact color you want to use. If you set the background color for an element, it will override any other background color settings you may have applied to a container or a message. Except for buttons. Background color for a button will make the area within the button a specific color. To change the color of the space behind a button use <strong>Element Background Color</strong>. For more information about background color see <a href="http://www.w3schools.com/cssref/pr_background-color.asp">http://www.w3schools.com/cssref/pr_background-color.asp</a>.</td>
<td>• Button</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Containers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HTML</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Image</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Social</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Table</td>
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<tr>
<td></td>
<td></td>
<td>• Text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Webpage</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Description</td>
<td>Available In</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Background Image</td>
<td>Sets an image that is used for the background of the message. You can use a background image for the body of your message; the image does not appear behind the header or footer of the message. If you use a background color for a container or element, the background color will cover the image. If you want to create “white space” so that certain parts of a background image appear in a message, use the <strong>Spacer</strong> element. For example, if you want to center your message content on a background image, add a container with a Spacer element to the top and bottom of a message.</td>
<td>• Message Design</td>
</tr>
</tbody>
</table>
| Border Color      | Changes the color of a border around the element. You can either select an option from the color picker, enter any generic color (blue, red, purple), or enter the HEX value for a color. When you set a border color you must also set a border style in order for the border to be displayed. When you assign a border color to an element, the border is applied to the perimeter of the element, not to the container box the element is in. So if you have more than one element in a container box only the element you applied the border color to will have the border. **Note:** Due to some email client's limited ability to support complex borders, this value cannot be used with a border radius. | • Containers  
• HTML  
• Image  
• Message Design  
• Social  
• Table  
• Text  
• Webpage |

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<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
</table>
| Border Radius    | Adds a rounded border to a button. If you set a border radius any other border values you set will not be applied due to the limited ability of some email clients to support complex borders. If you decide, after setting a border radius, you'd rather use the other border options, set a border style and the border radius will be overwritten. Use either a px value or a % to change the shape of the button. If you enter multiple px values, then the button shape will be rounded differently on each corner:  
  • One value will round all of the corners equally. For example 2px  
  • Two values will round the left and right sides of the button. For example 2% 10%  
  • Four values will round each corner in relation to the other corners. For example 2px 10px 4px 20px  
For more information about the CSS properties for border radius see [http://www.w3schools.com/cssref/css3_pr_border-radius.asp](http://www.w3schools.com/cssref/css3_pr_border-radius.asp). | • Button      |
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
</table>
| Border Style    | Adds a border in the specified style around the element. You can select an option from the menu. The border style shown is what the border will look like. For more information see [http://www.w3schools.com/cssref/pr_border-style.asp](http://www.w3schools.com/cssref/pr_border-style.asp). If you want to change the color of the border, use the border color design option. If you want to change the width from the default use the border width design option. When you assign a border style to an element, the border is applied to the perimeter of the element, not to the container box the element is in. So if you have more than one element in a container box only the element you applied the border style to will have one. **Note:** Due to some email client's limited ability to support complex borders, this value cannot be used with a border radius. | • Containers  
• HTML  
• Image  
• Message Design  
• Social  
• Table  
• Text  
• Webpage |
| Border Width    | Adjusts the width of the lines in a border. You should use this element if you want to use a variable border width or want to use a border to create a line between elements on the canvas (instead of a box). To use border width to create a line instead of a border, set the sides of the border you don't want to display to 0px. Border width overrides any width setting you have applied to the same element or container using the border option. You will only see the border width settings applied to your message if the element or container also has border settings. **Note:** Due to some email client's limited ability to support complex borders, this value cannot be used with a border radius. | • Containers  
• HTML  
• Image  
• Message Design  
• Social  
• Table  
• Text  
• Webpage |
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulleted list</td>
<td>Adds bullets to your list items. You can choose from a disc bullet or a circle bullet. For information on numbered lists, see the Numbered Lists entry.</td>
<td>Text</td>
</tr>
</tbody>
</table>
| Column Width        | Sets the width of a box in a container. Set custom column width for a container box by opening a container's settings and selecting either Equal Column Widths or Custom Column Widths from the Layout tab. If you select Custom Column Widths you can further edit each box width by either:  
|                     | • Sliding the bar for a container to the left or right  
|                     | • Entering a new number in the px box  
|                     | The total width of a container must equal 640 px. When you adjust one container box, the other container boxes will be adjusted in order to meet the 640 px requirement. | Containers   |
| Device Rendering    | Determines whether the columns in a container will stack or shrink on a mobile device. By default, when an email is viewed on a mobile device columns in a container stack on top of each other to avoiding shrinking the content in the container. However, in some situations you may want the content in the container to shrink so the columns in the container can maintain their vertical alignment.  
<p>|                     | If you do not want the columns in a container to stack, click the Do not stack on mobile box located under Device Rendering on the Layout tab. This only applies to the individual container. You must select this setting for each container you do not want stacked. | Containers   |</p>
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element Background Color</td>
<td>Sets the color of the container box behind a button. This can be used to style the background color behind a button if you want only the container column behind a button to be a specific color. To set the color of the entire container a button is in, set the Background Color for the container.</td>
<td>• Buttons</td>
</tr>
<tr>
<td>Font Color</td>
<td>Sets the color used for text. You can either select a color by clicking on the color picker, or you can enter the CSS color value if you know the exact color you want to use. If you set the font color for an element, it will override any other font color settings you may have applied to a container or the message. This means, if you make the font color of a Text element yellow, the text will be yellow, even if you have set the font color of the rest of the container to be green.</td>
<td>• Button</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Containers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HTML</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Message Design</td>
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<td>• Table</td>
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<td>• Text</td>
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<td>• Webpage</td>
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<tr>
<td>Menu Option</td>
<td>Description</td>
<td>Available In</td>
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<tr>
<td>----------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------</td>
</tr>
</tbody>
</table>
| Font Family    | Specifies the type of font used for text. Fonts have been divided into three categories. In the **Font Family** list, the first set of fonts that appear are considered supported fonts. These fonts will display as designed in any situation a contact may open an email in. The second set of fonts, found under the **Reduced Support** heading, may not be supported in all situations. When you use one of these fonts it's possible a contact opening an email using a specific browser, email client, or mobile device might see a different font than the one you select. Generally, the font you chose will be replaced by another font in the same font family. The final set of fonts, found under the **Limited Support** heading, are generally not supported by most email clients or browsers. We do not recommend using these fonts. For more information about font family see [http://www.w3schools.com/cssref/pr_font_font-family.asp](http://www.w3schools.com/cssref/pr_font_font-family.asp). | • Button  
• Containers  
• HTML  
• Message Design  
• Table  
• Text  
• Webpage |
| Font Size      | Sets the size of the text. While you can set the font size to a percentage or a general size (small, medium, etc.) we recommend you set the font size in px. The default font size is 16px.                   | • Button  
• Containers  
• HTML  
• Message Design  
• Table  
• Text  
• Webpage |
| Font Style     | Specifies if the font is italic. Font style can either be italics or normal text. By default, text is set to normal. | • Button  
• Containers  
• HTML  
• Message Design  
• Table  
• Text  
• Webpage |
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font Weight</td>
<td>Specifies if the font is bold. Font weight can be bold or normal text. By default, text is set to normal.</td>
<td>• Button</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Containers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• HTML</td>
</tr>
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<td></td>
<td>• Message Design</td>
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<td></td>
<td></td>
<td>• Table</td>
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<td></td>
<td></td>
<td>• Text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Webpage</td>
</tr>
<tr>
<td>Height</td>
<td>Controls the amount of space that is used for a Spacer.</td>
<td>• Spacer</td>
</tr>
<tr>
<td></td>
<td>Setting the height for the <strong>Spacer</strong> or <strong>Text</strong> element lets you control the amount of space between elements. Always use a px value for the height.</td>
<td>• Text</td>
</tr>
<tr>
<td>Line Height</td>
<td>Sets the distance between lines in text. By default, line height is set to normal but you can select other percentages in order to increase the line height. The higher the line height percentage is set, the greater the space there will be between lines of text in the element. You cannot apply line height at the container level or to a selection of text within a single element. If you have two <strong>Text</strong> elements in the same container cell, only the <strong>Text</strong> element you apply line height to will be effected by the setting.</td>
<td>• Button</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Table</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Text</td>
</tr>
<tr>
<td>Letter Spacing</td>
<td>Sets the amount of space between letters. You can set letter spacing using px or em. By default, letter spacing is set to 0. You have the option of either using a preset letter spacing (0px, 0.25px, 0.5px, 0.75px, 1px, 1.25px, 1.5px, 1.75px and 2px) or specifying your own letter spacing value. When you set letter spacing to a number larger than 0, it will increase the spread between letters. When you set letter spacing to a number smaller than 0 (Example: -0.25), letters will appear closer together.</td>
<td>• Button</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Text</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Description</td>
<td>Available In</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------</td>
</tr>
</tbody>
</table>
| Message Alignment| Sets the alignment for all elements in a message. Message alignment sets the alignment for the contents of your message but is not applied to the header or footer of a message. You can set the message alignment by going to **Settings > Message Design**. From here you can choose one of the following for message alignment:  
  • left: the message contents will be aligned to the left edge  
  • center: the message contents will be centered  
  • right: the message contents will be aligned to the right edge  
If you set the alignment at the container or element level, those settings will override the message alignment. If you want to globally set the alignment for text in your message, but do not want to align the other elements in the message, set **Message Design > Text Alignment** instead of using message alignment. | • Message Design |
| Numbered list    | Adds numbers to your list items. You can choose from numbers or Roman numerals. For information on bulleted lists, see the **Bulleted List** entry.                                                                 | • Text       |
| Padding          | Controls the white space around the element.  
If you select a padding setting from the list, the padding is applied equally on all sides on the element. You can also type values into the box in order to apply different margin widths to each side of your element. For example, if you type 15px 5px then the top and the bottom of the element will have 15px of white space and the left and right space in the element will have a 5px of white space around it. | • Button  
• Containers  
• HTML  
• Image  
• Message Design  
• Rec Loop  
• Social  
• Table  
• Text  
• Webpage |
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Background</td>
<td>Sets a background color for a page. You can either select a color by clicking on the color picker, or you can enter the CSS color value if you know the exact color you want to use. If you set a background color for an element or a container it will override the Page Background setting.</td>
<td>Message Design</td>
</tr>
<tr>
<td>Subscript</td>
<td>Sets the selected text below the line. For example, if you type H2O for water, you can put the 2 in a subscript and it will look like this: H\textsubscript{2}O.</td>
<td>Text</td>
</tr>
<tr>
<td>Superscript</td>
<td>Sets the selected text above the line. For example, if you want to add the registered trademark symbol after your product name, you could put the symbol in a superscript and it would look like this: Product\textsuperscript{®}.</td>
<td>Text</td>
</tr>
<tr>
<td>Text Alignment</td>
<td>Sets the alignment for text at the message level. You can set the text alignment for all text in a message by going to Settings &gt; Message Design. From here you can choose one of the following for text alignment: • left: the text will be aligned to the left edge of the element or container its in • center: the text will be centered in the element or container its in • right: the text will be aligned to the right edge of the element or container its in • justify: stretches the text so that each line has equal width If you set alignment for text at the container or element level, those settings will override the text alignment set at the message level.</td>
<td>Message Design</td>
</tr>
</tbody>
</table>
## Menu Option

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
<th>Available In</th>
</tr>
</thead>
</table>
| **Text Decoration** | Specifies if the font has an underline or strikethrough. By default, text decorations is set to normal. | • Button  
• Containers  
• HTML  
• Message Design  
• Table  
• Webpage |
| **Width**        | Sets the width of an element. The width can be set with  
• Percentages: sets the width in relation to the size of the container the element is in. So, if you set a button to have 100% width, it will completely fill the container box.  
• Px: sets the width to a specific size. If that size is larger than the container box, the container box size is automatically adjusted to accommodate the width setting. | • Button  
• Image  
• Message Design |

### Related Topics

**CSS Reference**

### Design Device Targeted Emails With Media Queries

With CSS, you can use media queries to create messages that can be displayed with the optimal design for the device that your contact opens the email with.

At its most basic level, a media query is a snippet of CSS you can add to your email that is used to apply a design style when a set of conditions are met. The media query is an expression that can be either true or false. Generally, you'll want to use media queries to make your messages mobile-friendly. This can include things like having containers stack differently, showing or hiding a container or element, or managing fonts differently when the email is displayed on a screen of a particular size. To make the query work you need to include:

- `@media`: Let's the CSS know this is a media query
- `what you want to matter`: These are what attributes of the media type that are important. For example, you might want to test the width of a screen.
- `the CSS styling you want to apply`: This is what you want to happen when the conditions of the media query are met.

For example, let's say you have a container you don't want to show up when a contact opens the email on a mobile device. In the email message editor you would go to **Settings** and then click **Edit CSS**. Then you would enter the following media query in the CSS window:

```
@media (max-width: 420px) { .container-36469004145 {display: none ! important; } }
```

This query indicates that if the maximum width of the device is under 420px then container 36469004145 will not be displayed. To target a container or element, you must use the unique CSS class ID provided in the email message editor. You can find the unique CSS class ID for the containers and elements in your message by:

1. Editing the element or container so that the **Design** palette for that container or element is open.
2. Scrolling to the bottom of the palette.
3. Copying the CSS class ID found in the black box.

It is not required that you target a specific element or container in your media query. You can apply the query to your message as a whole by using .container instead of a container or element ID. Something to remember though is CSS styling still follows the message design hierarchy rules. So, if you set a media query on the body of the message using .container, any element-level settings will override your media query. A way around this is to use .element when you want to make sure something is applied to everything in a message. For example, smaller text can be hard to read on a mobile phone, so you might want to use the media query

```css
@media (max-width: 420px) { .element {font-size: large !important; } }
```

to make text appear larger. This will make all of the text in every type of element larger. Instead of `large`, you could also set all of the text a specific size, such as `16px`.

Media attributes that are commonly used in media queries include:

- **Device width:** Typically when you target the width of a device you want to display something differently on a mobile device. Most mobile devices have a width of 480px or lower in portrait mode. Because there are so many devices and the size of devices are constantly changing, we recommend you consult the specifications for mobile devices before you build your media queries based on device width. If you want to exclude something from mobile, use `max-width`. If you want something to only display on mobile, use `min-width`.

- **Resolution:** If you have high resolution graphics that you only want to display when someone views them on a high resolution device, you can set a `min-resolution`.

- **Orientation:** A common reason to target device orientation is when you want containers to stack differently based on `orientation: portrait` or `orientation: landscape`.

It is important to note that not all email clients support media queries. Some of the major clients and devices that do not include:

- Gmail mobile app
- Yahoo Mail mobile app
- Microsoft Outlook mobile app on Android
- Android 2.1 and earlier

**Message Editor And Outlook**

Because desktop versions of Microsoft Outlook do not support responsive design, some elements of a message you create with the email message editor may not appear as expected when a contact opens the message in Outlook’s desktop client.

In order to provide an optimal viewing and interaction experience across multiple email clients, the email message editor utilizes responsive design practices. This means whether your contacts view an email on mobile device, on the web, or on a desktop email client the elements in the email are scaled to the correct dimensions for their user experience.

However, desktop versions of Microsoft Outlook not yet supporting responsive design can cause some issues with the design of a message when a contact views it using Outlook. Contacts who use the Outlook desktop client might experience display issues with the text alignment and image design in emails that are created using the email message editor. But there are workarounds you can use when you create a message to help minimize these issues. It's important
to note, while Bronto provides some basic suggestions for managing the lack of responsive design support, we cannot predict with complete accuracy how Outlook will render your message.

**Image Design**

When you add an image to a Container in the message editor, the image is automatically scaled in the message based on a percentage width. Outlook does not respect percentage widths, so when the message is opened in Outlook the image will not display as expected. If the image is smaller than the Container it is in, Outlook stretches the image to fill the Container. If the image is larger than the Container it is in, Outlook displays the image at its actual size. So, if you used an 800 px image in a 100px Container, the image will display 8 times larger than you wanted or expected it to.

There are two ways you can design images in the editor so that they appear as desired in Outlook:

- Open the image in an image editor and resize the image to the exact dimensions you want it to be in your email. The image will not be distorted as long as it isn't significantly smaller than the Container it is placed in.
- In the Design menu for an Image element, set the Width to the desired image width using px instead of a percentage. This width should be close to the width of the Container so the image is not artificially stretched.

  **Note:** Setting a pixel width for images may distort the responsiveness of images in other email clients. so test your message in multiple email clients to determine the best width to use.

**Text Alignment**

Outlook does not properly manage text alignment that is set at the element level. If you want to align text within a Container, you should use the container or message level Design menu settings to align the text. You can also write and import CSS to manage text alignment in a message.

**Other Email Editors**

While most customers prefer to use the email message editor or the HTML editor, Bronto also provides the flexibility of using plain text, web page, and template editors.

**Create Email: WYSIWYG Editor**

The WYSIWYG (“What You See Is What You Get”) editor provides a Word-like experience to compose email messages. Additionally, you can use the WYSIWYG editor to directly type in HTML code, or copy and paste text from another application. Email messages composed with the WYSIWYG editor are trackable HTML messages.

To create an email message using the WYSIWYG editor:

1. Go to **Messages > Messages**.
2. Click **Create New Message**.
3. Click **Create Email Message**.
4. In the Name Your Email Message section, add a name for the email message in the Message Name text box.
   - The email message name is the unique identifier for the email message. Think of it as the name of a document. It is important to remember that this is not the subject line for the email message. You should name the email message something relevant to its purpose.
5. Optional: In the Message Organization section, select a message folder to store the message in using the Message Folder pull-down menu.
   - You can also add a new message folder by clicking the Create a new folder in the selected folder checkbox and adding a name for the folder in New Folder Name text box. If you do not select a message folder, the message will be kept in the Messages folder by default.
   - For more information on message folders, see Use Folders To Organize Your Messages on page 964.
6. Optional: If you have enabled Campaigns, select a campaign to associate with the message:
a) Click **No Campaign Selected**.
b) Select the campaign from the list.

If you want to create a new campaign, click **New Campaign**, enter a name for the campaign in the **Name** box, select a marketing campaign type from the **Type** list, enter a **Description**, and then click **Save Changes**.

c) Click **Apply**.

7. Click the **HTML (WYSIWYG Editor)** radio-button.

8. Click **Next**.

9. Add a subject line for your email message in the **Subject Line** text box.

For information on writing subject lines, see **Effective Email Subject Lines** on page 203.

You can use dynamic content in email subject lines. For more information on how to use dynamic content in email subject lines for HTML and Template email messages, see **Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email** on page 182.

10. Optional: Click the **Sync HTML and Text Subjects** checkbox to use the subject line from the HTML version of your email message in the text version.

The **Sync HTML and Text Subjects** checkbox can also be used to add dynamic content to the subject line of the text version of your email message. For more information on adding dynamic content to the text version of email messages, see **Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email** on page 182.

11. Optional: Select a header to use in the email message from the **Header** pull-down menu.

   By default, the **Header** pull-down menu allows you to select a header that links to the online version of your email message.

   Including a link to the online version of your email message allows your contacts to view the email message in their web browser, instead of their email client. If a contact is having trouble viewing the email message in their email client, they will at least be able to view the email message as you intended in their web browser.

   For more information on creating headers in your account, see **Headers And Footers** on page 142.

12. Optional: Select a footer from the **Footer** pull-down menu.

   The following footers are included in the **Footer** pull-down menu by default:

   - **CAN-SPAM Compliant Footer** - Adds a CAN-SPAM Compliant footer to the bottom of your email message that includes the recipient, the sender, the sender's physical mailing address, a Forward to a Friend link, a Manage Preferences link, an Unsubscribe link, and a "delivered by" icon.
   - **Default Footer** - Includes all of the same information as the CAN-SPAM compliant footer, just in a different format.
   - **No Footer** - Removes all information from the footer except for the bare minimum required to remain CAN-SPAM compliant.

For more information on creating footers in your account, see **Headers And Footers** on page 142. For more information on CAN-SPAM compliance, see **CAN-SPAM Act** on page 200. For more information on Manage Preferences, Forward to a Friend, and Unsubscribe webforms, see **Webforms**.

13. Add content to the body of your email message using the WYSIWYG editor.

For more information on using the WYSIWYG editor to add content to your email message, see **Edit HTML Source Using The WYSIWYG Editor** on page 103.

**Note:**

Any time an SMS call-to-action is used (e.g. **Text Helptest to 33233 to receive a coupon**), you must clearly display the following terms of service/conditions text:

```
Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms
```
This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

14. Click
   • **Save** to save your work and continue editing.
   • **Save and Close** to save and close the email message.

**Create Email: HTML Code Editor**

Composing an email message using the HTML Code editor lets you work directly with the HTML code. You can either compose HTML code from scratch, or paste in existing HTML code directly into the application.

To create an email message using the HTML Code editor:

1. Go to **Messages > Messages**.
2. Click **Create New Message**.
3. Click **Create Email Message**.
4. In the **Name Your Email Message** section, add a name for the email message in the **Message Name** text box.
   
   The email message name is the unique identifier for the email message. Think of it as the name of a document. It is important to remember that this is not the subject line for the email message. You should name the email message something relevant to its purpose.

5. Optional: In the **Message Organization** section, select a message folder to store the message in using the **Message Folder** pull-down menu.
   
   You can also add a new message folder by clicking the **Create a new folder in the selected folder** checkbox and adding a name for the folder in **New Folder Name** text box. If you do not select a message folder, the message will be kept in the Messages folder by default.
   
   For more information on message folders, see **Use Folders To Organize Your Messages** on page 964.

6. Click the **HTML (Code Editor)** radio-button.
7. Click **Next**.
8. Add a subject line for your email message in the **Subject Line** text box.
   
   For information on writing subject lines, see **Effective Email Subject Lines** on page 203.

   You can use dynamic content in email subject lines. For more information on how to use dynamic content in email subject lines for HTML and Template email messages, see **Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email** on page 182.

9. Optional: Click the **Sync HTML and Text Subjects** checkbox to use the subject line from the HTML version of your email message in the text version.
   
   The **Sync HTML and Text Subjects** checkbox can also be used to add dynamic content to the subject line of the text version of your email message. For more information on adding dynamic content to the text version of email messages, see **Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email** on page 182.

10. Optional: Select a header to use in the email message from the **Header** pull-down menu.
    
    By default, the **Header** pull-down menu allows you to select a header that links to the online version of your email message.
    
    Including a link to the online version of your email message allows your contacts to view the email message in their web browser, instead of their email client. If a contact is having trouble viewing the email message in their email client, they will at least be able to view the email message as you intended in their web browser.
    
    For more information on creating headers in your account, see **Headers And Footers** on page 142.

11. Optional: Select a footer from the **Footer** pull-down menu.
    
    The following footers are included in the **Footer** pull-down menu by default:
• **CAN-SPAM Compliant Footer** - Adds a CAN-SPAM Compliant footer to the bottom of your email message that includes the recipient, the sender, the sender's physical mailing address, a Forward to a Friend link, a Manage Preferences link, an Unsubscribe link, and a "delivered by" icon.

• **Default Footer** - Includes all of the same information as the CAN-SPAM compliant footer, just in a different format.

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For more information on creating footers in your account, see **Headers And Footers** on page 142. For more information on CAN-SPAM compliance, see **CAN-SPAM Act** on page 200. For more information on Manage Preferences, Forward to a Friend, and Unsubscribe webforms, see **Webforms**.

12. From here, you can begin adding HTML content to the body of the email message.

For some guidelines you can follow when creating HTML email messages, see **Good HTML Email Design** on page 201. If you prefer to use an editor, you can choose to create an email message using the WYSIWYG editor. For more information on creating email messages using the WYSIWYG editor, see **Create Email: WYSIWYG Editor** on page 100.

a) Optional: Click **File Manager** to view the files you have hosted in the application.

   **Tip:** For more information on using the file manager, see **Upload Files To Bronto** on page 1161.

b) Optional: Click **Dynamic Content** to add dynamic content to an email message.

   For more information on using dynamic content, see **Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email** on page 182.

c) Optional: Use the **Insert Special Tags** and **Insert Field Tags** pull-down menus to insert special tags and field tags.

   For more information on using field tags and special tags, see **Message Tags** on page 149.

   **Note:**

   Any time an SMS call-to-action is used (e.g. *Text Help-test to 33233 to receive a coupon*), you must clearly display the following terms of service/conditions text:

   ```
   Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms
   ```

   This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

13. Click

   - **Save** to save your work and continue editing.
   - **Save and Close** to save and close the email message.

**Edit HTML Source Using The WYSIWYG Editor**

The WYSIWYG editor is visually and functionally very similar to Microsoft Word. If you are not sure what the button icons on the WYSIWYG editor represent, you can mouse over them to display the buttons name. If you want to learn about the functionality of the buttons used in the WYSIWYG Editor, you can read the descriptions below.

   **Tip:** You can edit multiple messages in multiple browser tabs. For example, you can edit your Monthly Newsletter in one tab, all while editing your Spring Sale message in another tab.

The **Edit HTML Source** button lets you view and edit the HTML source for your message. When you click this button, a pop-up window will appear containing the HTML source of your message.

   **Warning:** If you do not click **Update**, any changes that you make to the HTML source will not be saved and reflected in the other versions of your message.
Any changes you make in the HTML source will be shown in the WYSIWYG editor and text view of your message provided you clicked Update. The Word Wrap checkbox ensures all of the HTML content fits into the default window size so that you can see all of your HTML code without having to scroll sideways.

**Make The WYSIWYG Editor Full Screen**

The Toggle Full Screen Mode button will open up the editor in a full screen view, allowing for a larger workspace. To return to the normal view, click this button again.

**Cut and Paste Content WYSIWYG Editor**

There are several ways you can cut and paste using the WYSIWYG editor. Each is described below.

<table>
<thead>
<tr>
<th>Action</th>
<th>How To</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
<td>1. Select the text or image you want to cut.</td>
<td>The Cut option will remove selected items (text, images, etc.) from the message body.</td>
</tr>
<tr>
<td></td>
<td>2. Use the following keyboard shortcut:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Command + X on Macs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• CTRL + X on Windows</td>
<td></td>
</tr>
<tr>
<td>Copy</td>
<td>1. Select the text or image you want to copy.</td>
<td>The Copy option will copy selected items (text, images, etc.) in the message body.</td>
</tr>
<tr>
<td></td>
<td>2. Use the following keyboard shortcut:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Command + C on Macs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• CTRL + C on Windows</td>
<td></td>
</tr>
<tr>
<td>Paste</td>
<td>1. Select the text or image you want to paste.</td>
<td>The Paste option will take a copied item and place in a specified location in the editor.</td>
</tr>
<tr>
<td></td>
<td>2. Use the following keyboard shortcut:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Command + V on Macs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• CTRL + V on Windows</td>
<td></td>
</tr>
<tr>
<td>Paste As Plain Text</td>
<td>1. Click the Paste as Plain Text button.</td>
<td>The Paste As Plain Text button allows you to remove the formatting from copied text, and paste it plain text format.</td>
</tr>
<tr>
<td></td>
<td>2. Copy the text you wish to paste into the WYSIWYG editor.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Command + C on Macs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• CTRL + C on Windows</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Paste the text into the WYSIWYG editor.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Command + V on Macs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. CTRL + V on Windows</td>
<td></td>
</tr>
</tbody>
</table>
**Action**

Paste From Word

1. Click the **Paste From Word** button.
   - A pop-up window will appear.
2. Copy the text you wish to paste from Microsoft Word into the WYSIWYG editor:
   - Command + C on Macs
   - CTRL + C on Windows
3. Paste the copied text into the text box in the **Paste From Word** pop-up window by placing your cursor in the text box and hitting:
   - Command + V on Macs
   - CTRL + V on Windows
4. Click **Insert**.

**Notes**

The **Paste From Word** button allows you to paste content directly from Microsoft Word into the WYSIWYG Editor.

---

**Format And Style Message Content WYSIWYG Editor**

The following table describes the menus and buttons you can use to style message content.

<table>
<thead>
<tr>
<th>Button</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formatting menu</strong></td>
<td>The <strong>Formatting</strong> pull-down menu lets you change the formatting style for text in your message. Each of the possible options provides you with a preview of what text using that formatting style will look like.</td>
</tr>
<tr>
<td><strong>Font Family</strong></td>
<td>The <strong>Font Family</strong> pull-down menu lets you change the font used in the body of your message.</td>
</tr>
<tr>
<td><strong>Font Size</strong></td>
<td>The <strong>Font Size</strong> pull-down menu lets you change the size of the font used in your message.</td>
</tr>
<tr>
<td><strong>Text Color</strong></td>
<td>The <strong>Select Text Color</strong> button lets you pick the color used for text in your message. When you first click the <strong>Select Text Color</strong> button, you will be shown the default palette of colors. To see additional colors, click <strong>More Colors</strong>.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>The <strong>Bold</strong> button lets you add bold text to your message.</td>
</tr>
<tr>
<td><strong>Italics</strong></td>
<td>The <strong>Italics</strong> button lets you add italic text in your message.</td>
</tr>
<tr>
<td><strong>Underline</strong></td>
<td>The <strong>Underline</strong> button lets you underline text in your message.</td>
</tr>
<tr>
<td><strong>Strikethrough</strong></td>
<td>The <strong>Strikethrough</strong> button lets you add strikethrough to text in your message.</td>
</tr>
<tr>
<td><strong>Decrease Indent</strong></td>
<td>The <strong>Decrease Indent</strong> button lets you decrease the indentation in your message.</td>
</tr>
<tr>
<td><strong>Increase Indent</strong></td>
<td>The <strong>Increase Indent</strong> button lets you increase the indentation in your message.</td>
</tr>
<tr>
<td>Button</td>
<td>Notes</td>
</tr>
<tr>
<td>--------</td>
<td>-------</td>
</tr>
<tr>
<td>Block Quote</td>
<td>The <strong>Block Quote</strong> button adds HTML block quote tags around a selected area of text. The HTML block quote tag is most commonly used to indicate a block of text quoted from an external source.</td>
</tr>
<tr>
<td>Insert Tab</td>
<td>The <strong>Insert Tab</strong> button will insert a tab (4 spaces) from the location of your cursor. For formatting purposes, it is best to use the tab button and not the tab key on your keyboard.</td>
</tr>
<tr>
<td>Align Left</td>
<td>The <strong>Align Left</strong> button will align the message content to the left side of the page.</td>
</tr>
<tr>
<td>Align Center</td>
<td>The <strong>Align Center</strong> button will align all of your content to the center of the page.</td>
</tr>
<tr>
<td>Align Right</td>
<td>The <strong>Align Right</strong> button will align all of your message content to the right of the page.</td>
</tr>
<tr>
<td>Align Full</td>
<td>The <strong>Align Full</strong> button will not align your text and uses the full width of the message content area.</td>
</tr>
<tr>
<td>Background Color</td>
<td>The <strong>Select Background Color</strong> button sets the background color for highlighted text. To see additional colors, click <strong>More Colors</strong>.</td>
</tr>
<tr>
<td>Select All</td>
<td>The <strong>Select All</strong> button will highlight all of the content in the WYSIWYG Editor.</td>
</tr>
<tr>
<td>Remove Formatting</td>
<td>The <strong>Remove Formatting</strong> button will remove the HTML formatting from a selected area. To remove formatting from specific content, highlight the content and the click <strong>Remove Formatting</strong>.</td>
</tr>
<tr>
<td>Insert Horizontal Line</td>
<td>The <strong>Insert Horizontal Line</strong> button adds a horizontal line that spans the width of the message at the location of your cursor.</td>
</tr>
<tr>
<td>Insert Special Character</td>
<td>The <strong>Insert Special Character</strong> button on the WYSIWYG editor lets you add international and special HTML characters to your message. When you click this button, a pop-up window will appear that contains all of the available custom HTML characters. If you mouse-over a particular character, you will be shown an enlarged preview and the name of the HTML character. You will also notice that you are provided with the HTML-Code and NUM-Code for that particular character. When you find the character you want, click on it, and it will be added to your message at the location of your cursor.</td>
</tr>
<tr>
<td>Insert/Edit Anchor</td>
<td>The <strong>Insert/Edit Anchor</strong> button adds an anchor to your message at the location of your cursor. You can use the anchor to create a bookmark in your message.</td>
</tr>
<tr>
<td>Insert/Remove Numbered List</td>
<td>The <strong>Insert/Remove Numbered List</strong> button lets you create a list arranged in numerical order.</td>
</tr>
</tbody>
</table>
**Button** | **Notes**
--- | ---
Insert/Remove Bulleted List | The *Insert/Remove Bulleted List* button lets you create a bulleted list.

**Undo or Redo A Change Using The WYSIWYG Editor**
You can use buttons to undo or redo changes.

The *Undo* button ![undo](image) will undo the previous change or edit. You can also do:
- Command + Z on Macs
- CTRL + Z on Windows

The *Redo* button ![redo](image) will redo a change or edit that has been undone. You can also do:
- Command + Y on Macs
- CTRL + Y on Windows

**Find/Replace Content Using The WYSIWYG Editor**
The *Find* button ![find](image) allows you to find specific words or phrases. You can also choose to replace those words once they are found. The *Find/Replace* button ![find](image) will take you to the same pop-up as the Find button, only you will be shown the options for search and replace as opposed to just find.

To find or search and replace:
1. Click the Find button to find or click the *Find/Replace* button to search and replace.
   A pop-up window will appear.
2. Add the word or phrase you wish to search for in the *Find What* text box.
3. Add the word you want to use as the replacement in the *Replace With* text box.
4. Use the *Direction* radio buttons to determine if the application will start looking above (Up) where your cursor is currently located, or below (Down).
5. If you want the application to also match the case of the word or phrase you wish to find (i.e. searching for "Bob" will find "Bob" but not "bob"), click the *Match case* check box.
6. Click *Find Next* to begin finding matches for the word or phrase you are searching for.
7. When a match is found, you can click *Replace* to replace the original word or phrase with the new word or phrase.
   If you wish to replace all of the matches found, click *Replace All*.

**Clean Up Messy Code Using The WYSIWYG Editor**
The *Cleanup Messy Code* button ![clean](image) helps to ensure that the HTML code in your message is not only valid, but also easier to read and interpret. This button will remove most non-valid HTML, consolidate HTML tags, and remove any unused HTML that may be cluttering up your HTML code.

**Insert Edit Or Remove Links Using The WYSIWYG Editor**
The *Insert/Edit Link* button ![insert](image) lets you insert a new link or edit an existing link in your message.

The *Unlink* button ![unlink](image) will remove the formatting (i.e. the `<a href=""`) that causes text to be a hyperlink. The hyperlink text will become normal text. You must highlight the link before you use the *Unlink* button to remove the formatting.

To insert a link:
1. Highlight the text you want to turn into a link.
2. Click the *Insert/Edit Link* button.
   A pop-up window will appear.
3. Add the link URL in the Link URL text box.
   You can also click the Browse button next to the Link URL text box to use the file manager to find the object you wish to link to. Make sure to always add the http:// protocol on to the beginning of URLs. If you forget to do this, when you insert the link, a pop-up will appear asking if you would like to add the http:// protocol. Click Ok to add the protocol on to the beginning of your URL.
   For more information on using the file manager, see Upload Files To Bronto on page 1161.

4. Click Insert to create the URL.
   This represents the minimum you need to do to insert a link. See below for an explanation of the additional settings you can use.

Additional Settings

- Predefined Links - The Link List pull-down menu contains convenient links to predefined pages in the application. Each link and the page that it points to is described below:
  - Manage Preferences URL - This option links to your Manage Preferences webform.
  - Unsubscribe URL - This option inserts a link to your Unsubscribe webform.
  - Forward to Friend URL - This option will link to your Forward to a Friend webform.
  - Web Version URL - This option provides a link that allows a contact to view the html version of this email in a browser outside of their email client. This may be helpful if the contact doesn't know how to load images, is seeing a malformed email due to rendering issues, or is viewing a text only version of the email. This should never be used as an image link.
  - Text Version URL - This option provides a link that allows a contact to view the text version of this email in a browser outside of their email client.
  - Confirm URL - This option links to your Subscription Confirmation webform. You can use this option in confirmation/subscription messages to allow contacts to confirm subscription to lists.

  Tip: For more information on Manage Preferences, Unsubscribe, Forward to a Friend, and Subscription Confirmation webforms, see Webforms.

- Anchors - The Anchors pull-down menu contains a list of the anchors that you have added to your messages. If you select an anchor, it will become the URL for your message. The Anchors pull-down menu will only appear if anchors have been added to your message.

  Tip: For information on creating anchors, see Insert/Edit An Anchor Using The WYSIWYG Editor.

- Title - The Title text box lets you add a title to your link. When a title is added to a link, a tool-tip will appear containing the title when you mouse-over the link.

  Note: Dynamic Code can be used in URLs, however, the URLs (links) will not be tracked. You will not be able to view click level metrics for links containing Dynamic Code.

Related Topics
Upload Files To Bronto on page 1161
You can upload files to be hosted on Bronto.

Add A mailto Link Using The WYSIWYG Editor

The Insert/Edit Link button provides an easy way to add a mailto link to your message. This link will allow your contacts to easily send a message to the email address you specify.

To add a mailto link:

1. Highlight the text you want to turn into a mailto link.
2. Click the Insert/Edit Link button. A pop-up window will appear.
3. Type mailto: in the Link URL box.
4. Add the email address you want to use after mailto: in the Link URL box.
For example mailto:mycompany@example.com

5. Click Insert.

**Insert/Edit Images Using The WYSIWYG Editor**

The **Insert/Edit Image** button in the WYSIWYG editor lets you add an image to your message.

If you plan to use a hosted image, it can be uploaded using Bronto's file manager.

To insert an image:

1. Move your cursor to the place in the message where you want the image to go.
2. Click the **Insert/Edit Image** button.
3. On the **General** tab:
   a) Add the image URL for the image you wish to add in the **Image URL** text box.
      You can also click the **Browse** button next to the **Image URL** text box to use the file manager to either find
      the image you want to link to or to upload a new image. For more information see **Upload Files To Bronto** on
      page 1161.

      Make sure to always add the http:// protocol on to the beginning of your URL. If you forget to do this,
      when you go to insert the image, a popup will appear asking if you would like to add the http:// protocol.
      Click **Ok** to add the protocol on to the beginning of your URL.
   b) Add a description for the image in the **Image Description** box.
      This text will act as the **alt** attribute for your image and will be shown if the image can not be displayed.
      Although not required, it is important to provide a description for your image in case your contact's have
      adjusted their inbox settings to block images, or their email client disabled images.
   c) Optional: Add a title for the image in the **Title** box.
      When a title is added to an image, a tool tip containing the title is displayed when you mouse over the image.
   d) Use the **Preview** window make sure you have uploaded the correct image.

4. Optional: Use the Appearance tab to style the image placement:

   • **Alignment** Adjusts the position of the image in your message. You can use the preview window directly next to
     the **Alignment** menu to see how the different alignment options will position the image in your message.
   • **Dimensions** Defines the width and height in pixels (px) for the image in the **Dimensions** text boxes.
   • **Vertical space** Defines the amount of empty space above and below the image in the **Vertical Space** text box.
     This is the same as adding top and bottom padding in CSS.
   • **Horizontal space** Defines the amount of empty space on the left and right of the image in the **Horizontal Space**
     text box. This is the same as adding left and right padding in CSS.
   • **Border** Defines a border to place around your image in the **Border** text box. For example, if you enter 5, then a
     5 pixel border will be placed around the image.
   • **Style** Sets the style for the border in the **Style** text box. You will use the same conventions used in CSS to
     define the style for the border. The default style is **border: 5px solid black;**.

5. Click **Insert** to add the image to your message.

**Insert A New Table Using The WYSIWYG Editor**

The **Insert/Edit Table** button lets you add a table into the body of your message.

To insert a table:

1. Move you cursor to the spot in your message where you want the table to go.
2. Click the **Insert/Edit Table** button.
   A pop-up will appear.
3. Click **Insert** to create this basic 2 column, 2 row table.
By default, the table is set to have 2 columns and 2 rows. However, you can change the settings on the General and Advanced tabs to customize the table to your specifications. See below for more information on the General and Advanced tabs.

4. Click Insert when you have finished selecting all of the table options.

General Tab

• Columns - You can specify the number of columns in the table in the Columns text box.
• Rows - You can specify the number of rows in the table in the Rows text box.
• Cell Padding - You can define the space between the cell walls and the contents of the cell (in pixels) in the Cell Padding text box. Do not enter “px” after the value you enter here, only enter the numerical value.
• Cell Spacing - You can define the space between cells (in pixels) in the Cell Spacing text box. Do not enter “px” after the value you enter here, only enter the numerical value.
• Alignment - In the Alignment pull-down menu you can select the alignment for the table. You can select:
  • left
  • center
  • right
• Border - You can define the thickness of the border used in your table (in pixels) in the Border text box. Do not enter “px” after the value you enter here, only enter the numerical value.
• Width - You can define the width of the table (in pixels) in the Width text box. Do not enter “px” after the value you enter here, only enter the numerical value.
• Height - You can define the height of the table (in pixels) in the Height text box. Do not enter “px” after the value you enter here, only enter the numerical value.

Advanced Tab

• Background Image - In the Background Image text box, you can add a URL pointing to an image you want to use as the background image for the table. You can also click the Browse button next to the Background Image text box to use the file manager to find the image you want to link to.
• Border Color - You can define the color of the border surrounding the table in the Border Color text box, or use the color picker and select a specific color.
• Background Color - You can define the color of the background for the table in the Background Color text box, or use the color picker and select a specific color.

Spell Check Your Message Using The WYSIWYG Editor

The Toggle Spell Checker button lets you spell check your message.

To use the spell checker:

1. Click on the Toggle Spell Checker button. All misspelled words will be underlined with a red line.
2. Click on a misspelled word to bring up a list of suggested correct spellings.
3. Scroll down to the correct spelling of the word and select it from the list of suggested words.

The misspelled word will be replaced by the correct word you select.

Add Field Tags Using The WYSIWYG Editor

The Field Tags pull-down menu contains all of the fields that you have created in your account. When you select a field from this pull-down menu, a field tag will be added to your message. The field tag will appear in the following format %%tagname%%, where tagname represents the name you assigned to that field. The %%tagname %% tag will be replaced with the value stored in that field for the contact receiving the message. For example, if you have a field called firstname used to store the first name of your contacts, and you select this field tag in your message, then the %%firstname%% field tag will be replaced by the value contained in the firstname field for the contact receiving the message.

For more information on field tags, see Field Tags on page 151. For more information on fields, see Contact Fields on page 558.
Add Special Tags Using The WYSIWYG Editor

The Special Tags pull-down menu allows you to add tags to your message that are replaced by data contained in your account.

For a full explanation of each type of special tag, see Special Tags on page 152.

Add Content Tags In The WYSIWYG Editor

Content tags allow you to create reusable "blocks" of content that you can use in the body, header, and footer of your messages. The block of content is referenced in your message via a custom defined content tag you create. When your message is scheduled, the content tag is replaced with the appropriate content.

For more information about creating content tags, see Create Legacy WYSIWYG Content Tags on page 140.

Tip: While many tags are pulled into your message at the time a message is sent, content tags are pulled into a message at the time a message is scheduled for delivery. This helps expedite the delivery of messages. To change the content associated with a content tag in a scheduled message, cancel the delivery, change the content, then schedule a new delivery.

We do not support adding dynamic code to content tags. You can, however add content tags to Dynamic Code. For more information on dynamic code, see Dynamic Code on page 190.

1. Create a new, or edit an existing message body, header, or footer.
2. In the body, header, or footer of your message, add %%@thenameofyourcontenttag%%, replacing thenameofyourcontenttag with the name of the Content Tag you want to reference.
   For a list of all the content tags in your account, go to Content > Content Tags.
3. When editing a message where content tags are being used in the message, header, or footer, click Show Preview.
   The preview will allow you to see what your message will look like with the content referenced via the Content Tag added to the message, header, or footer.

Insert Baynote Recommendations Using The WYSIWYG Editor

Once you have the Baynote Recommendation fully configured, you are ready to insert a Baynote Recommendation into your message. The Insert Baynote Recommendation button allows you to insert a Baynote recommendation into your message.

Note: If you don't see the Baynote icon within the WYSIWYG editor, then you may need to do a force refresh of the editor. This can be done in most browsers by holding down the shift key and clicking the refresh button.

To insert a Baynote recommendation in your message:
1. Place your cursor in the body of the message where you would like a recommendation to be placed.
2. Click on the Insert Baynote Recommendation button in the WYSIWYG editor.
3. Select the layout you want to use for your recommendation.
   The Layout options allow you to change the format of the image that is generated by Baynote. We have provided several different formats for you to choose from. We suggest that you test your message after trying out different options to be sure you are pleased with the layout.
4. Choose the size of the recommendation you wish to use.
   The Size attribute allows you to change between large and small-sized images. The specific dimensions vary by layout chosen.
5. Specify the Index attribute for this recommendation.
   The Index attribute option allows you to select which recommendation number (or recommendation index as referred to by Baynote) you wish to receive. This is normally used when you wish to show several recommendations for one product. The first recommendation would have an index of 1, for the second recommendation you should set the index to 2, and so on.
6. Specify the Attribute Filter for this recommendation.
The Attribute Filter setting allows you to override the setting you set when configuring the Baynote Connection.

7. Specify the Product URL for this recommendation.
   The Product URL indicates which product you want this recommendation to be based off of.
   
   **Note:** This is the URL for the product you want recommendations to be based off of, and needs to be the URL referenced in your Baynote catalog. If you have any doubts about which URL to use, you should check your Baynote account.

8. Specify the Guide Name for this recommendation.
   The Guide Name setting allows you to override the setting you set when configuring the Baynote Connection.

9. Click **Insert**.

   ![](image)

   To customize the appearance of a Baynote recommendation:

   10. When editing a Baynote recommendation, click the **Appearance** tab.

   11. Use the **Font** pull-down menu to change the font displayed on the recommendation.

   12. For each attribute you set on the Connections Center page, you can select a custom color for the text using the color picker.

   13. You can also specify a background color by adding in a CSS color value to the Background Color text box.

   14. Click **Insert**.
To preview a Baynote recommendation:

15. When editing a Baynote recommendation, click the **Appearance** tab.

16. Click **Preview Baynote Link**. A preview of the Baynote recommendation will appear in the Preview window.

---

**Insert A Facebook Like Button Using The WYSIWYG Editor**

The **Insert A Facebook Like Button** button allows you to add a Facebook like button in your message. This allows your contacts to "Like" a message you send them.
To add a Facebook like button using the WYSIWYG editor:

1. Place your cursor in the body of the message where you want the Facebook Like button to appear.
2. Click the **Insert A Facebook Like Button** button 📣.

**Insert A Link To A Webform Using The WYSIWYG Editor**

The **Insert Webform Link** button 📩 in the WYSIWYG editor lets you add a link in your message that points to a webform you have created.

To insert a link to a webform using the WYSIWYG editor:

1. Place your cursor in the body of the message where you want the webform link to appear.
2. Click the **Insert Webform Link** button 📩.
3. Select the type of webform you want to link to in the **Type** pull-down menu.
4. Choose whether you want to link to a specific webform or the default webform for a given type.
   
   If you choose to link to a specific webform, you will need to select that webform using the webform picker.
Tip: When you create a webform, you can set it as the default for that particular type (i.e. Add Contacts, Manage Preferences, etc.) For more information on making a webform the default, see Make A Webform The Default Used on page 234.

5. Click Insert.

Insert MyBuys (Magnetic) Recommendations Using The WYSIWYG Editor

Once you have the MyBuys (Magnetic) Recommendation fully configured, you can insert a MyBuys (Magnetic) Recommendation into your message. The Insert MyBuys (Magnetic) Recommendation button allows you to insert a MyBuys (Magnetic) recommendation into your message.

Note: If you don't see the MyBuys (Magnetic) icon within the WYSIWYG editor, then you may need to force a refresh of the editor. This can be done in most browsers by holding down the shift key and clicking the refresh button.

To insert a MyBuys (Magnetic) recommendation in your message:

1. Place your cursor in the body of the message where you would like a recommendation to be placed.
2. Click on the Insert MyBuys (Magnetic) Recommendation button in the WYSIWYG editor.

The MyBuys (Magnetic) Link window will appear.

3. Choose the Message Type.
4. Insert the Recommendation Number.
5. Insert the Product Codes.
6. Insert the Category Key Codes.
7. Optional: You can click the preview tab to preview the MyBuys (Magnetic) link you are adding.
8. Click **Insert**.

**Set Product Tag Placeholder Defaults WYSIWYG Editor**

If you add a product tag that uses an arbitrary placeholder, you need to map the placeholder to a Product ID. In the WYSIWYG editor, you can map the placeholder to a default product using the **Set Product Defaults** button.

After you map the placeholders in product tags, the product tag is replaced with the product data that matches the field defined in the tag when the message is sent. When you map a default product to a product placeholder, this product is used every time this message is sent, unless you specify a different product placeholder mapping at the time you schedule the message.

**Note:** If your product placeholder is a contact or API message field, you do not need to map the placeholder.

To set product placeholder defaults:

1. Click on **Set Product Defaults**.

   If you have already added product tags to your message, the placeholders for the tags are displayed.

2. Find the placeholder you want to map and enter the Product ID you want to map the placeholder to in the **Default Product ID** box.

3. Repeat steps 2, as necessary, to set any additional placeholder defaults.

4. If you do not see the placeholder you want to map:
   a) Click on **Add Placeholder**.
   b) Enter just the product placeholder text in the **Product Placeholder** box.
   c) Enter the Product ID you want to map the placeholder to in the **Default Product ID** box.

5. Click **Save Changes** when you have set all of your defaults.

**Social Share Links in Emails**

Social Sharing allows you to add links to email messages that let your contacts share email messages you send them using various social networks.

**Insert Social Share Links Using The WYSIWYG Editor**

The Insert Social Share Link button on the WYSIWYG editor allows you to add icons to an email message that link to various social media outlets.

To insert Social Share links:

1. Click the **Insert Social Share Link** button in the WYSIWYG editor.

2. Specify a title in the Title text box that will be used on the sharing page for a given social network.

   Depending on the type of social network, the title may be displayed in different ways, or not all. See the screenshots below to see how each social networking site displays the title.

3. Specify summary text in the Summary text box.

   Depending on the type of social network, the summary may be displayed in different ways, or not all.

4. Click the checkbox next to the social media outlet that you want add an icon and corresponding link to in your message. The results of clicking on each of these links are also described below. Currently you can choose from:

   - Facebook
   - Digg
   - MySpace
   - Twitter
   - Linkedin

5. Click **Insert**.
Create Social Sharing Links Using HTML

The example code snippets provided below demonstrate the proper HTML formatting for each type of social sharing link. These example will not work if they are copy/pasted as written. Instead, the following variables in the code example must be updated with information specific to your site:

- **summary** replace Example Summary
- **title** replace Example Title
- **href** replace
  - `public_domain` with your domain. This is the domain you use to send messages. If you are not using a private domain this domain will be app.bronto.com.
  - `brontositeID` with your site ID. A quick way to locate your site ID is to go to Home > Settings > Data Exchange and find the site ID that is listed with the Direct Import parameters.
  - `Example%20Title` with the title you provided.
  - `Example%20Summary` with the summary you provided
- the image `src` URL for the social network. Because social networks frequently update logos we recommend you upload the most recent logo into Bronto and use the hosting path for the uploaded logo.

Be sure to include the opening and closing span tags and only include the updated social share code snippets for the social media accounts you plan to link to from your message.

```html
<span summary="Example%20Summary" title="Example%20Title"
class="socialshare" xml="lang">
  <!-- Facebook -->
  <a class="socialshare facebook" href="http://public_domain/public/social/process_share/?fn=SocialShare&socnet=facebook&ssid=brontositeID&tid=%%!tracksent_key%%&title=Example%20Title&summary=Example%20Summary">
    <img class="socialshare facebook" src="http://static/static/shared/icons/social/tiny_facebook.gif" border="0px" alt="Share this email with your network on Facebook" />
  </a>
  <!-- Twitter -->
  <a class="socialshare twitter" href="http://public_domain/public/social/process_share/?fn=SocialShare&socnet=twitter&ssid=brontositeID&tid=%%!tracksent_key%%&title=Example%20Title&summary=Example%20Summary">
    <img class="socialshare twitter" src="http://static/static/shared/icons/social/tiny_twitter.gif" border="0px" alt="Share this email with your network on Twitter" />
  </a>
  <!-- LinkedIn -->
  <a class="socialshare linkedin" href="http://public_domain/public/social/process_share/?fn=SocialShare&socnet=linkedin&ssid=brontositeID&tid=%%!tracksent_key%%&title=Example%20Title&summary=Example%20Summary">
</span>
```

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Create Email: Plain Text Editor

A Plain Text email message is an email message sent in text only format. Plain text email messages provide the best delivery results, however, we are unable to track metrics, such as open and clicks, from plain text messages.

To create an email message using the Plain Text editor:

1. Go to Messages > Messages.
2. Click Create New Message.
3. Click Create Email Message.
4. In the Name Your Email Message section, add a name for the email message in the Message Name text box.
   The email message name is the unique identifier for the email message. Think of it as the name of a document. It is important to remember that this is not the subject line for the email message. You should name the email message something relevant to its purpose.
5. Optional: In the Message Organization section, select a message folder to store the message in using the Message Folder pull-down menu.
   You can also add a new message folder by clicking the Create a new folder in the selected folder checkbox and adding a name for the folder in New Folder Name text box. If you do not select a message folder, the message will be kept in the Messages folder by default.
   For more information on message folders, see Use Folders To Organize Your Messages on page 964.
6. Click the Plain Text Message radio-button.
7. Optional: In the Message Organization section, select a message folder to store the message in using the Message Folder pull-down menu.
   You can also add a new message folder by clicking the Create a new folder in the selected folder checkbox and adding a name for the folder in New Folder Name text box. If you do not select a message folder, the message will be kept in the Messages folder by default.
   For more information on message folders, see Use Folders To Organize Your Messages on page 964.
8. Add a subject line for your email message in the Subject Line text box.
   For information on writing subject lines, see Effective Email Subject Lines on page 203.
   You can use dynamic content in email subject lines. For more information on how to use dynamic content in email subject lines for HTML and Template email messages, see Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email on page 182.
9. Optional: Select a header to use in the email message from the **Header** pull-down menu.

   By default, the **Header** pull-down menu allows you to select a header that links to the online version of your email message.

   Including a link to the online version of your email message allows your contacts to view the email message in their web browser, instead of their email client. If a contact is having trouble viewing the email message in their email client, they will at least be able to view the email message as you intended in their web browser.

   For more information on creating headers in your account, see Headers And Footers on page 142.

10. Optional: Select a footer from the **Footer** pull-down menu.

   The following footers are included in the **Footer** pull-down menu by default:

   - **CAN-SPAM Compliant Footer** - Adds a CAN-SPAM Compliant footer to the bottom of your email message that includes the recipient, the sender, the sender's physical mailing address, a Forward to a Friend link, a Manage Preferences link, an Unsubscribe link, and a "delivered by" icon.
   - **Default Footer** - Includes all of the same information as the CAN-SPAM compliant footer, just in a different format.
   - **No Footer** - Removes all information from the footer except for the bare minimum required to remain CAN-SPAM compliant.

   For more information on creating footers in your account, see Headers And Footers on page 142. For more information on CAN-SPAM compliance, see CAN-SPAM Act on page 200. For more information on Manage Preferences, Forward to a Friend, and Unsubscribe webforms, see Webforms.

11. From here you can begin adding content to the plain text version of the email message:

   a) Optional: Click **File Manager** to view the files you have hosted in the application.

      For more information on using the file manager, see Upload Files To Bronto on page 1161.

   b) Optional: Click **Dynamic Content** to add dynamic content to the email message.

      For more information on using dynamic content, see Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email on page 182.

   c) Optional: Use the **Insert Special Tags** and **Insert Field Tags** pull-down menus to insert special tags and field tags.

      For more information on using field tags and special tags, see Message Tags on page 149.

   **Note:** We will automatically shorten all links automatically added to the plain text version of email messages by the application. These links include the view web version, view HTML version, and unsubscribe links. We still track clicks for these shortened URLs. These links will be shortened when the email message is sent, so if you preview the message, the links will not appear shortened. If you want to view what the shortened links will look like in your email message, we suggest you send some test email messages. For more information on sending test email messages, see Message Testing Program.

   **Note:**

   Any time an SMS call-to-action is used (e.g. Text HelpTest to 33233 to receive a coupon), you must clearly display the following terms of service/conditions text:

   ```
   Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms
   ```

   This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

12. Optional: If you click the **HTML Version** tab, you will notice that there is no HTML version of the email message.

    The reason for this is you chose to create a plain text email message. However, if you decide you want an HTML version of the email message, you can click Create one now to create an HTML version of your plain text email message.

13. Click
Create And Design

- **Save** to save your work and continue editing.
- **Save and Close** to save and close the email message.

Create Web Page-Based Email

The Send Web Page message type allows you to enter the URL for a web page and use it as an email message. First you need to compose the web page and host it online. We recommend using the hosting in your account (go to Content > Hosting), however, the web page does not have to be hosted there. After you have the web page hosted online, select Send Web Page when you create an email message and specify the URL pointing to the web page. The application will take a snapshot of the page and then give you options to deliver it via email.

- **Note:** For security reasons, we will remove all JavaScript from the web page before it is used in an email message.
- **Note:** The application will follow up to 2 redirects for a URL used in a web page email message.

For more information on hosting files in the application, see Upload Files To Bronto on page 1161.

To create an email message using a web page:

1. Go to Messages > Messages.
2. Click Create New Message.
3. Click Create Email Message.
4. In the Name Your Email Message section, add a name for the email message in the Message Name text box.
   
   The email message name is the unique identifier for the email message. Think of it as the name of a document. It is important to remember that this is not the subject line for the email message. You should name the email message something relevant to its purpose.

5. Optional: In the Message Organization section, select a message folder to store the message in using the Message Folder pull-down menu.
   
   You can also add a new message folder by clicking the Create a new folder in the selected folder checkbox and adding a name for the folder in New Folder Name text box. If you do not select a message folder, the message will be kept in the Messages folder by default.

   For more information on message folders, see Use Folders To Organize Your Messages on page 964.

6. Click the Send Web Page radio-button.
7. Add the URL pointing to the web page you wish to use as the email message in the text box that appears.
8. Optional: In the Message Organization section, select a message folder to store the message in using the Message Folder pull-down menu.
   
   You can also add a new message folder by clicking the Create a new folder in the selected folder checkbox and adding a name for the folder in New Folder Name text box. If you do not select a message folder, the message will be kept in the Messages folder by default.

   For more information on message folders, see Use Folders To Organize Your Messages on page 964.

9. Add a subject line for your email message in the Subject Line text box.
   
   For information on writing subject lines, see Effective Email Subject Lines on page 203.

   You can use dynamic content in email subject lines. For more information on how to use dynamic content in email subject lines for HTML and Template email messages, see Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email on page 182.

10. Optional: Click the Sync HTML and Text Subjects checkbox to use the subject line from the HTML version of your email message in the text version.

    The Sync HTML and Text Subjects checkbox can also be used to add dynamic content to the subject line of the text version of your email message. For more information on adding dynamic content to the text version of email messages, see Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email on page 182.
11. Optional: Select a header to use in the email message from the **Header** pull-down menu.

By default, the **Header** pull-down menu allows you to select a header that links to the online version of your email message.

Including a link to the online version of your email message allows your contacts to view the email message in their web browser, instead of their email client. If a contact is having trouble viewing the email message in their email client, they will at least be able to view the email message as you intended in their web browser.

For more information on creating headers in your account, see **Headers And Footers** on page 142.

12. Optional: Select a footer from the **Footer** pull-down menu.

The following footers are included in the **Footer** pull-down menu by default:

- **CAN-SPAM Compliant Footer** - Adds a CAN-SPAM Compliant footer to the bottom of your email message that includes the recipient, the sender, the sender's physical mailing address, a Forward to a Friend link, a Manage Preferences link, an Unsubscribe link, and a "delivered by" icon.

- **Default Footer** - Includes all of the same information as the CAN-SPAM compliant footer, just in a different format.

- **No Footer** - Removes all information from the footer except for the bare minimum required to remain CAN-SPAM compliant.

For more information on creating footers in your account, see **Headers And Footers** on page 142. For more information on CAN-SPAM compliance, see **CAN-SPAM Act** on page 200. For more information on Manage Preferences, Forward to a Friend, and Unsubscribe webforms, see **Webforms**.

13. Optional: Click the **Use web page title as the subject** checkbox to use the content contained in the **title** tag on the web page as the subject for the email message.

Be mindful, however, that the content contained in the **title** tags adheres to proper subject line standards.

For more information on what makes a good subject line, see **Effective Email Subject Lines** on page 203.

14. Optional: Click the **Refresh web page prior to send** checkbox to refresh the contents of the email message to the most recent version of the web page before the email message is sent.

Content will be pulled from the web page 30 minutes in advance of the scheduled delivery time. Do not change the content of the web page being used 30 minutes prior to, or during the sending of the email message to ensure the expected content gets used in the email message.

15. Optional: Click **Refresh** to update the version of the web page shown in the window to the latest version.

16. Click

- **Save** to save your work and continue editing.

- **Save and Close** to save and close the email message.

**Add External CSS To A Web Page Email**

The **CSS Inliner** button allows you to add external CSS to web page based email messages.
**Warning:** If you receive an error message that says certain elements, like images, are not showing up, check the URLs in the CSS being used by the CSS Inliner. You need to make sure all of the URLs are working (i.e. you can paste the URL in your browser and something appears), including the URL that points to the style sheet. These types of URLs are known as absolute URLs.

**Note:** The **CSS Inliner** button is only available when editing web page email messages.

To add external CSS to an email message:

1. Create a new, or edit an existing web page email message.
2. Add a link to your style sheet to the top of the HTML email message.
   
   For example:

   ```html
   <link href="http://example.com/views/styles.css" media="screen,print" rel="stylesheet" type="text/css" />
   ```

   If you are using the WYSIWYG editor, make sure you add the link to the style sheet in the HTML of the email message using the Edit HTML Source button.

3. Click **CSS Inliner**.

**Create Email: Templates**

When you add or remove an editable section in an email template, the email template automatically saves the changes. When you make changes to the content in an editable section of an email template, you can save those changes using the Save buttons that appear in the pop-up window. The **Cancel**, **Save**, and **Save and Close** buttons on the bottom of the page only apply to changes made to the subject line, header, and footer. Hence, if you delete an editable section and then click the **Cancel** button on the bottom of the page, the deletion of the editable section will not be shown in the preview because that **Cancel** button only applies to the subject line, header, and footer. However, when you go back to edit the email template, the deleted editable section will not be shown.

To create an email message using an email template:

1. Go to **Messages > Messages**.
2. Click **Create New Message**.
3. Click **Create Email Message**.
4. In the **Name Your Email Message** section, add a name for the email message in the **Message Name** text box.

   The email message name is the unique identifier for the email message. Think of it as the name of a document. It is important to remember that this is not the subject line for the email message. You should name the email message something relevant to its purpose.
5. Optional: In the **Message Organization** section, select a message folder to store the message in using the **Message Folder** pull-down menu.

You can also add a new message folder by clicking the **Create a new folder in the selected folder** checkbox and adding a name for the folder in **New Folder Name** text box. If you do not select a message folder, the message will be kept in the Messages folder by default.

For more information on message folders, see **Use Folders To Organize Your Messages** on page 964.

6. Click the **Template Message** radio button.

7. Choose the email template you want to use from the window that appears.

8. Optional: In the **Message Organization** section, select a message folder to store the message in using the **Message Folder** pull-down menu.

You can also add a new message folder by clicking the **Create a new folder in the selected folder** checkbox and adding a name for the folder in **New Folder Name** text box. If you do not select a message folder, the message will be kept in the Messages folder by default.

For more information on message folders, see **Use Folders To Organize Your Messages** on page 964.

9. Add a subject line for your email message in the **Subject Line** text box.

For information on writing subject lines, see **Effective Email Subject Lines** on page 203.

You can use dynamic content in email subject lines. For more information on how to use dynamic content in email subject lines for HTML and Template email messages, see **Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email** on page 182.

10. Optional: Select a header to use in the email message from the **Header** pull-down menu.

By default, the **Header** pull-down menu allows you to select a header that links to the online version of your email message.

Including a link to the online version of your email message allows your contacts to view the email message in their web browser, instead of their email client. If a contact is having trouble viewing the email message in their email client, they will at least be able to view the email message as you intended in their web browser.

For more information on creating headers in your account, see **Headers And Footers** on page 142.

11. From here, you can begin adding content to your email message using the email template editor.

    **Note:** All UTF-8 characters are supported in email templates.

For more information on using the email template editor, see **Add Content To The HTML Version Of An Email Template Message** on page 123.

    **Note:**

Any time an SMS call-to-action is used (e.g. *Text Helptest to 33233 to receive a coupon*), you must clearly display the following terms of service/conditions text:

    Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms

This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

12. Click

    • **Save** to save your work and continue editing.
    • **Save and Close** to save and close the email message.

**Add Content To The HTML Version Of An Email Template Message**

Email templates separate your content from the overall design of the email message. All you have to do is pick an email template and then replace the body, text, and images.
Tip: You can edit multiple messages in multiple browser tabs. For example, you can edit your Monthly Newsletter in one tab, all while editing your Spring Sale message in another tab.

From the HTML Version tab, you can begin making actual changes in the editable sections of an email template.

How it works:

Note: API message tags and loop tags can be used in the body of template messages.

1. Determine if the section can be edited. Do this by moving your mouse over a given area.
   
   If a small pop-up window appears and the background color changes behind the section you are mousing over, then you can make changes to that section. If you are still not sure which sections you can edit, you can click Show Outline (see below for more information).

2. When you are ready to edit the email template, mouse over a given section on the email template.
   
   A pop-up will appear that contains an edit link.

3. To begin making changes, click the edit link.

   A new window containing an editor will appear. Different editors will appear depending on the type of editable section you clicked on. For example, if you mouse over the title section and click the edit link, then the window that appears will contain a text box that you can use to make basic text edits. If you mouse over the body section and click edit, then the window that appears will contain the WYSIWYG editor.

   Note: All UTF-8 characters are supported in email templates.

   For more information on using the WYSIWYG editor, see Edit HTML Source Using The WYSIWYG Editor on page 103.

View An Outline Of An Email Template Message

When you click the Show Outline button from the HTML Version tab, you will be taken to the outline view of your email template message. The outline view makes it easy to see which sections of your email template you can edit. To edit a given section, click the Edit link on the right side of the section.
Create And Design

Refresh An Email Template Message

If a refresh link appears next to the Type on the Email Message Overview page, the email template used in message has been updated.

To refresh the template used in an email message:

1. Go to Messages > Messages.
2. Click on the name of a message created using a template that has been updated.
3. Click Refresh.

The new version of the email template will appear in a preview window.

4. Click
   - Save to apply the email template changes to the email message.
   - Cancel to ignore the email template changes and keep the email message in its current form.

Email Templates

Email templates are like email stationery or letterhead. They separate the content of your email message from the overall design.

You can use a standard email template design for each email message, replacing only the body text and images with new content. Select the email template option and you will be presented with a pop-up window that outlines your email template choices. Choose an email template and click Next to access options for editing the email template.
**Default Email Templates**
We provide several default email templates that will get you started creating basic email messages. For further customization of email template messages, you should upload a custom email template.

![Templates: Default Templates](image)

**Edit A Default Email Template**
While you can not directly edit a default email template, you can make a copy of the default template and turn it in to a custom template.

To turn a default template to a custom template:
1. Go to **Content > Email Templates**.
2. Click **Default Templates**.
3. Click **Copy to Custom Templates** next to a default template.
4. Optional: If you want to begin editing the template now, click the **Edit the template now** checkbox.
5. Click **Copy**.

**Upload Custom Email Templates**
In addition to the default email templates, you can also upload your own custom email templates.

For more information on creating your own custom email template, see *Get Started Designing A Custom Email Template* on page 127.

To upload a custom email template:
1. Go to **Content > Email Templates**.
2. Click **Upload Template**.
3. Add a name for the email template in the **Template Name** text box.
4. Optional: Click the **Remove DOCTYPE** checkbox to keep the DOCTYPE.

The **Remove DOCTYPE** option is checked by default to help prevent cross email client formatting issues. When emails are sent via the application, they default to using the following DOCTYPE:

```xml
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
```

You can choose to keep the DOCTYPE intact, just be mindful that it may affect the formatting of your email.

5. In the **Template HTML** section, click **Choose File** to upload the HTML file that will be used for the custom email template.

6. Optional: Click **Choose File** in the Thumbnail Image section to upload a thumbnail image that will appear next to your custom email template on the **Email Templates** page.

Images uploaded as thumbnail images are added to the hosting area of the application. You can edit, delete, or change the thumbnail image used for a template at any time.

7. Optional: Click **Choose File** in the **Content File(s)** section to upload images or any other external resource to be used in the custom email template.

You can upload multiple items. You can remove an item from the list of items to upload by clicking the red X next to the items selected for upload.

![Content File(s):]

- **Note:** In addition to the Template HTML and Thumbnail image, you can upload a maximum of 48 Content Files.

8. Click **Upload** to upload the email template and associated content files.

**Get Started Designing A Custom Email Template**

Email templates are single web pages that can be created with any HTML or web page editor. The designer can code particular sections of the email template with tags designated for email template design. The end user can then compose a message based on the email template by simply supplying the content necessary to complete each section. When designing your email template, it is important to remember that you are designing for email and not necessarily the web. Here are a few pointers:

- **Note:** All email templates MUST be XHTML compliant.

- Use table based layouts instead of CSS based.
- Use inline CSS to provide a default style for your content.
- Optimize images for the web.
- Less is more. Keeping your layouts simple will help to reduce rendering problems.

After the web page is designed and coded, add the email template tags as described below to define which sections of the email template will be editable. The final step is to upload the email template and all related images. To begin uploading an email template, go to **Content > Email Templates** and click **Upload Template**

**Previous Considerations**

Email template tags, such as `%%!attribute1%%`, from previous versions of the application were deprecated with the May 2006 product release. Additionally, email templates tags that use `<ins>` as a means of defining email template content were deprecated with the November 2006 update.
Note: The current framework will not affect existing email templates that use <ins> tags. However, you will need to re-code your email template(s) according to the most recent framework if you wish to take advantage of the repeatable sections functionality.

Terms You Need To Know

We'll begin by taking a look at some common terms you'll see throughout the related topics:

• **Block** - Blocks are editable regions in your email template. For example, the logo, article header, and article content may all be editable blocks.

• **Attribute** - Attributes define the specifics of a block, such as the font style or appearance of content placed into the block.

• **Section** - Sections are areas in the email template that the user can clone in order to extend the email template to accommodate additional content. Sections can contain one or more blocks.

Code Email Templates

You'll be using `<div>` tags to create template blocks. Attributes can be added to these tags to define the block, and also how the end-user will supply content for the block. Thus, an email template-specific tag would take the following form:

```html
<div block="1" linked="1" key="body_one" description="Enter the body content" name="Body Content 1" display="plainlarge">
</div>
```

Technically, these attribute additions would make the `<div>` tag not XHTML-compliant. However, this doesn't affect the XHTML compliance of any messages based on email templates since the end user's content would replace the extended `<div>` tags before messages were sent.

Attributes

Each template-specific `<div>` tag can have the following six attributes:

• **block** - The `block` attribute is required to make an editable block. Any `<div>` tag that does not have this attribute will not be editable. Set the block attribute to a number to create an editable block. A good way of keeping track of your editable blocks is to assign them sequential numbers. For example the first editable block of your template would use `block="1"` as its block attribute, and the next editable block would use `block="2"`.

• **key** - Each `<div>` tag has its own unique key, a simple word that enables the template system to differentiate one block from another. This attribute is also required for all editable blocks. `key` attributes may only contain letters, numbers, and underscores. No spaces are allowed. Also, it is recommended to keep the id in lowercase in order to ensure that the email template is as transferable as possible. Here is an example of this attribute: `key="heading_1"`. The keys should follow a consistent naming convention.

• **linked** - `linked` is an optional attribute that you can use to create linked template blocks. For all blocks that you wish to link, set the `linked` attribute to the same value. For example, `linked="1"`. By doing so, all blocks with the same `key` attribute that are set to `linked="1"` will change to reflect the same content when one of them is edited. This attribute is useful for repeated content within the template, such as a date or section headings included in both the message table of contents and the message body.

• **name** - The `name` attribute is an optional attribute that determines the label the end-user will see when editing an email template. Here is an example: `name="Title"`. If you do not set the `name` attribute, then the key value will display in the email template editor.

• **description** - The `description` attribute is an optional attribute that determines the label that the end-user will see below the block name when editing an email template. Here is an example: `description="The title of your newsletter"`.

• **display** - The `display` attribute is another required attribute. It determines the type of form control used by the end user when composing a message based on the template. Available display types are `plain`, `plainlarge`, `rich`, `image`, and `link`.

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• plain will load a one line input box.
• plainlarge will load a multi-line text area.
• rich will load the standard WYSIWYG editor.
• image will allow for the selection of an image. The user can browse and select images stored in the hosting area, or specify the URL of the desired image. Also, the user can specify a URL to go when that image is clicked, a border for the image, alt tag text, and horizontal and vertical padding for the image. You'll want to make sure to use a border size of "0" if you apply a URL to an image, otherwise you'll get an unattractive blue border.
• link allows the user to enter the URL for an <a href="">. For example, the display attribute may appear as: display="rich"

So, here is one last look at a standard editable block tag that can be used in your email template:

```
<div block="1" key="heading_1" name="Main Heading" description="Main Heading goes here." display="plain">
  Main Header can be placed here.
</div>
```

Repeatable Sections

Repeatable Sections are areas in an email template that can be cloned in order to extend the email template to accommodate additional content. For example, a newsletter email template may be coded to have a repeatable section containing a section header and a section body, with each header/body section designed to represent an "article" for the newsletter. This type of design would allow the end-user to clone the section as many times as necessary to accommodate the story sections intended for the newsletter.

Coding Repeatable Sections

To specify a repeatable section, add the section attribute to the <div> or <span> tags that wrap the template blocks you wish to group in the section. For example:

```
<div section= "1">
  <div block="1" key="company_logo" name="Logo" description="Select your company's logo to appear at the bottom of the page." display="image"></div>
  <div block="1" key="body_text" name="Body text" description="Enter text for the message body" display="image"></div>
</div>
```

This example would repeat the logo section and body and allow you to place different content into each repeatable section. You can have more than one repeatable section in an email template.

**Note:** Sections can only be wrapped around other <div> tags or block-level elements, such as <p> or <table>. You cannot use sections to add columns or rows to a table.

Using Repeatable Sections

Repeatable sections are denoted in the email template UI with a dotted red outline and a green "add" icon in the upper-right corner that allows the user to clone the section.

After cloning a section, a new section will appear that displays the default section content. You will be able to add new content to this section. Also, you can reorder or delete the cloned sections by using the "up", "down", and "delete" icons which are described in the Using The Template Editor section of this document.
Example Code For A Custom Email Template

Below, you will find an example of a completely coded custom email template. You can copy and paste this example code and use it as a reference for creating your own custom email template. You could also see what this example custom email template looks like by copying and pasting the code into a text editor or HTML editor, saving the file as an HTML file, and then opening the HTML file in a browser. Additionally, the image below shows what the example email template code actually looks like.

```html
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
<title>Example Email Template Design</title>
</head>
<body bgcolor="#000000">
<table align="center" border="0" cellpadding="0" cellspacing="0">
<tr><td width="600" align="center" bgcolor="#FFFFFF">
<!-- Notice the attributes assigned to the <div> below-->
<div block="editable" name="headerimage" description="Editable Image Section" id="image" key="image" display="image">
<a href="http://www.google.com">
<img src="http://hosting-source.bronto.com/8428/public/googlelogo.gif" width="276" height="110" border="0" alt="Software Main Logo Image" />
</a>
</div>
</td></tr>
<tr><td width="600" height="15" bgcolor="#FFFFFF"></td></tr>
<tr><td width="600" valign="top">
<table border="0" cellpadding="0" cellspacing="0">
<tr><td width="215" bgcolor="#035F39" valign="top">
<table border="0" cellpadding="0" cellspacing="0">
<tr><td bgcolor="#035F39" height="10" width="215" colspan="3"></td></tr>
<tr><td width="14" bgcolor="#035F39"></td><td width="187"></td></tr>
</table>
</td><td width="600" valign="top" bgcolor="#035F39"></td></tr>
</table></td></tr>
<tr><td width="600" valign="top" bgcolor="#035F39"></td></tr>
<tr><td width="600" valign="top" bgcolor="#035F39"></td></tr>
<tr><td width="600" valign="top" bgcolor="#035F39"></td></tr>
</table>
</body>
</html>
```
<table border="0" cellpadding="0" cellspacing="0">
  <tr>
    <td width="185" height="5" bgcolor="#29A853" colspan="3"></td>
  </tr>
  <tr>
    <td width="185" bgcolor="#29A853" align="center" style="font-family:Arial, Helvetica, sans-serif; font-size:20pt; font-weight:bold; color:#ffffff;" colspan="3">
      <!-- An example of an editable header block-->
      <div block="editable" name="header" description="Header goes here" id="header" key="header" display="plain" style="font-family:Arial, Helvetica, sans-serif; font-size:18pt; font-weight:bold; color:#ffffff;">
        Headline Here
      </div>
    </td>
  </tr>
  <tr>
    <td width="185" height="5" bgcolor="#29A853" colspan="3"></td>
  </tr>
  <tr>
    <td width="5"></td>
    <td width="175" bgcolor="#035F39" style="font-family:Arial, Helvetica, sans-serif; font-size:10pt; color:#ffffff;">
      <!-- An example of an editable body block-->
      <div block="editable" name="body" description="Body goes here" id="body" key="body" display="rich" style="font-family:Arial, Helvetica, sans-serif; font-size:10pt; color:#ffffff;">
      </div>
    </td>
    <td width="5"></td>
  </tr>
  <tr>
    <td width="185" height="5" bgcolor="#035F39" colspan="3"></td>
  </tr>
  <tr>
    <td width="5"></td>
    <td width="175" bgcolor="#035F39" style="font-family:Arial, Helvetica, sans-serif; font-size:10pt; color:#ffffff;">
      <!-- An example of an editable body block-->
      <div block="editable" name="body" description="Body goes here" id="body" key="body" display="rich" style="font-family:Arial, Helvetica, sans-serif; font-size:10pt; color:#ffffff;">
      </div>
    </td>
    <td width="5"></td>
  </tr>
  <tr>
    <td width="185" height="5" bgcolor="#035F39" colspan="3"></td>
  </tr>
</table>
<table>
<thead>
<tr>
<th>Another Side Headline Here</th>
</tr>
</thead>
</table>

Mauris molestie sapien nec diam. In vehicula rutrum augue. Maecenas hendrerit lorem sed leo.

This body section will use WYSIWYG editor to insert images or text. Mauris molestie sapien nec diam. In vehicula rutrum augue. Maecenas hendrerit lorem sed leo.
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Section One</td>
</tr>
<tr>
<td>2</td>
<td>Section Two</td>
</tr>
<tr>
<td>3</td>
<td>Section Three</td>
</tr>
</tbody>
</table>

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 Preview of what the example code above looks like (standalone)
Tips, Tricks, and Best Practices For Custom Email Templates
Designing your own email template lets you move beyond the confines of the default email templates and opens the door for a lot of creativity and innovative design. We always encourage new and creative email templates, but we also suggest that you try and always follow the best practices described below.

Email Template Checklist

It is good practice to make sure that your email template includes the following items before uploading it to the application.

- **Special tags** - We require that all email messages include special tags. This helps to ensure that every email message that is sent via the application is compliant with the CAN-SPAM act. Integrating these tags in your email template design will allow you to dictate how where they are displayed in your email message. The special tags are:
  - `%%!account_address%%` - this displays all of your address information in a single line.
  - `%%!account_address1%%` - The first line of your address.
  - `%%!account_address2%%` - The second line of your address.
  - `%%!account_city%%` - Your city.
  - `%%!account_state%%` - Your state.
  - `%%!account_zip%%` - Your Zip.
  - `%%!account_country%%` - Your Country.

- **Unsubscribe or Manage Preferences Link** - We require that all email messages include either an unsubscribe or manage preferences link so that your contacts can easily unsubscribe or change their information. Here is an example of Unsubscribe link:
  `<a href="%%!unsubscribe_url%%">Click here to unsubscribe</a>`
  Here is an example of Manage Preferences link:
  `<a href="%%!manage_url%%">Click here to manage your preferences</a>`

- **Forward to a Friend link** - A good practice is to include a Forward to a Friend link in your email template so that your contacts can very easily forward a copy to their friends or associates. Here is an example of a Forward to a Friend link:
  `<a href="%%!forward_url%%">Click here to forward this message</a>`

- **Link to the Online Version** - Including a link to the online version of your email message will allow your contacts to view your email message in their web browser, instead of their email client. If a contact is having trouble viewing an email message in their email client, they will at least be able to view your email message as you intended. Here is an example of a link to the online version:
  `<a href="%%!message_url%%">View online version</a>`

**Tip:** For more information on special tags and field tags, see Message Tags on page 149.

Chopping Off the `<Head>` Tag

Most web-based email clients, such as Yahoo Mail, Gmail, AOL, and Hotmail, automatically remove all the content in between the `<head>` tags of incoming HTML-based messages. They do this because they are trying to display a web page (the message) inside a web page (their email client) and have to ensure that only one set of `<head>` tags (the head tags from their email client web page) can be present in order to display the resulting web page well.

For this reason, the application will only import the content between the open and close `<body>` tags. We recommend moving your CSS, and other content that might be within the `<head>` tags, between the `<body>` tags. By parsing everything but the `<body>` tag content when importing, messages based on your template are ensured to have the highest probability of looking the way you intended in your contacts' web-based email client.

CSS vs Inline Styles

We STRONGLY recommend that you code your email templates using inline styles as opposed to normal CSS. This approach will provide greater consistency across various email clients. Also, note that we will automatically attempt to move normal CSS to inline styles. Here is an example of standard CSS placed in the head or body:

```
<style type="text/css">
<!--
```
Example of inline CSS:

```
<div style="font-family: Times New Roman, Times, serif; font-size: 11pt; color: #ffffff;">
  Content goes here
</div>
```

**Related Topics**

Message Tags on page 149

There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

*Edit A Custom Email Template*

The edit option allows you to edit a custom email template.

The edit option only applies to custom email templates. Default email templates can not be edited.

To edit an email template:

1. Go to Content > Email Templates.
2. Click Edit next to the template you want to edit.
3. From here you can
   a. Edit the template's name
   b. Upload a new thumbnail image
   c. Manage the uploaded files
   d. Edit the template HTML
4. Click Save when you are finished.

*Edit The Uploaded Files Used In A Custom Email Template*

The manage files option allows you to edit and add supporting files used in custom email templates.

The manage files option only applies to custom email templates. You can not add or edit files used in default email templates.

To manage the files used in an email template:

1. Go to Content > Email Templates.
2. Click Manage Files next to the template you want to edit.
3. From here you can edit and remove the uploaded files used for a custom template.
4. Click Save when you are finished editing.

*Add Or Update A Custom Template Thumbnail Image*

To add or update a custom template thumbnail image:
1. Go to Content > Email Templates.
2. Find the template you want to upload a new thumbnail image for.
3. Click Edit
4. In the Update Thumbnail Image, click Choose File.
5. Select a thumbnail image from your computer.
6. Click Save.

*Delete Custom Email Templates*

The delete option allows you to delete a custom email template.

Once you have sent an email message using an email template, we do not allow you to delete it. We do this because deleting the email template would affect the layout of any sent email messages that used the email template. We recommend that you create a “trash” folder and use it to store unwanted email templates.

To delete a custom email template:
1. Go to Content > Email Templates.
2. Click Delete next to the template you want to delete.
3. Click Delete.

*Create Folders For Custom Email Templates*

To help organize and keep track of your custom email templates, you can create folders.

To create a folder for your email templates
1. Go to Content > Email Templates.
2. Click Create New Folder.
3. Add a name for the folder in the Name text box.
4. Click Save.

*Move A Custom Email Template To A New Location*

The move option allows you to move a custom email template to a new folder.

The move option only applies to custom email templates. Default email templates can not be moved.

To move an email template:
1. Go to Content > Email Templates.
2. Click Move next to the template you want to move.
3. Select the directory (folder) you want to move the template to using the New Directory pull-down menu.
4. Click Move.

*Search Email Templates*

You can use the search box on the Email Templates page to search through all the default and custom templates in your account.

To search the templates in your account
1. Go to Content > Email Templates.
2. Click
   - Custom Templates to search your custom templates.
   - Default Templates to search the default templates.
3. Click Search Folder.
4. Enter a search term in the Search text box.
5. Click Search.
Preview An Email Template
Previewsing an email template allows you to see what the template looks like in a desktop, mobile (portrait), and mobile (landscape) layout.

You can also expand and minimize the preview window to see how the template looks at different heights and widths.

To preview an email template:
1. Go to Content > Email Templates.
2. Click Preview next to the template you want to preview.
   You can preview both custom and default templates.
3. Optional: Use the pull-down menu to preview the template in the following layouts:
   - Desktop
   - Mobile (Portrait)
   - Mobile (Landscape)
4. Optional: Click and drag the bottom right corner to expand and minimize the preview window.
5. Click Close.
Content Tags

Content tags allow you to create reusable "blocks" of content that you can use in the body, header, and footer of your messages.

There are two types of content tags, drag and drop and legacy WYSIWYG content tags. Both can be inserted into both legacy WYSIWYG messages and email message editor messages. Legacy WYSIWYG content tags are created using an editor that looks similar to MS Word. They're called legacy tags because this is the type of content tag that existed before the new drag and drop content tags were added to the platform, but you can still create this type of tag using the legacy WYSIWYG content tag editor.

Drag and drop content tags are created with the drag and drop content tag editor. This editor is similar to the drag and drop interface of the email message editor, with some of the functionality that doesn't make sense for content tags removed.

The primary difference between drag and drop content tags and legacy WYSIWYG content tags, besides the editor, are that because drag and drop content tags leverage the email message editor they have built in responsive design elements. While this is great for use in any emails you want to design using the email message editor, the legacy WYSIWYG message editor doesn't have built-in support for responsive design. Generally legacy WYSIWYG content tags work better for messages designed with the legacy WYSIWYG message editor while drag and drop content tags work better with messages designed using the email message editor.

After the tags are created they can be inserted into your messages. In the legacy WYSIWYG message editor content tags are inserted like any other dynamic tag. In the email message editor content tags can either be inserted as a dynamic tag or you have the option to do a static insert, which will basically copy and paste the tag's content into your message.

Related Topics

Message Tags on page 149

There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

Create Legacy WYSIWYG Content Tags

You can create content tags that you can use as templates as you design emails. Legacy WYSIWYG content tags are best used in messages that are designed with the WYSIWYG message editor but can also be used in the email message editor.

Content tags are a great resource that can save you a lot of time by allowing you to create reusable blocks of content. After you create content tags you can use them in your messages. For more information about using content tags in messages see Add Content Tags In The WYSIWYG Editor on page 111 or Use Content Tags In The Email Message Editor on page 79.

Note: If you have available content tag templates, you need to make a copy of the template in order to edit and use it.

To create a content tag:

1. Go to Content > Content Tags.
2. Click Create New Content Tag.
3. Select Legacy WYSIWYG Editor and click Continue.
4. Specify a name for the tag in the Name text box.
   
   The name you specify will be used to reference this block of content. For example, if you name the Content Tag mycontenttag, the dynamic code text for this content tag would be %%mycontenttag%%.
5. Add the content you wish to display via this Content Tag using the WYSIWYG editor.
6. Click Save.

HTML used in content tags will appear as is (i.e. unformatted) if the Content Tag is used in a plain text message. In other words, if you add “This word is <strong>BOLD</strong>” in your Content Tag, and then add that Content
Create And Design

Tag to a plain text message, you will get “This word is <strong>BOLD</strong>” instead of “This word is BOLD”. However, if you add this Content Tag to an HTML message, you will end up with “This word is BOLD”.

Create Drag And Drop Content Tags

You can create content tags that you can use as templates as you design emails. The drag and drop content tag is best used in messages that are designed with the email message editor but can also be used in the legacy WYSIWYG message editor. However, when this type of tag is used in a WYSIWYG message some of the responsive design elements of the content tag might not work properly.

Content tags are a great resource that can save you a lot of time by allowing you to create reusable blocks of content. For more information about using content tags in messages see Use Content Tags In The Email Message Editor on page 79 or Add Content Tags In The WYSIWYG Editor on page 111.

Note: If you have available content tag templates, you need to make a copy of the template in order to edit and use it.

To create a Content Tag:

1. Go to Content > Content Tags.
2. Click Create New Content Tag.
3. Select Drag and Drop Editor and click Continue.
4. Click (Enter a Content Tag Name) and enter a name for the tag in the Name text box.
   The name you specify will be used to reference this block of content in the message editors or via the tag text. For example, if you name the Content Tag mycontenttag, the dynamic tag will be %%@mycontenttag%%.
5. Add the content you wish to display via this content tag using the drag and drop editor.
   Content is added to a content tag by dragging Containers and Elements to the palette and using the options in the design menu to style the content. Because Containers, Elements, and Design menu options are the same in the drag and drop editor as they are in the email message editor, see
   • Elements Palette on page 57 for more information about adding text, buttons, images, etc.
   • Containers Palette on page 53 for more information about structuring your content tag.
   • Design (Format) Message Content on page 87 for more information about styling the elements within the content tag.
6. Optional: To change the width of the content tag:
   By default content tags have the same width as messages, 640 px.
   a) Click Settings.
   b) Click Tag Design.
   c) Select a width from the Width list.
   d) Click Done.
7. Click Save.

Using Content Tag Templates

Bronto provides content tag templates that can be used as an email design shortcut.

Content tags are reusable blocks of content that can save you a lot of time during message creation. A content tag templates provides a jump start on creating content tags. When you have available content tag templates, simply copy the template, edit it, and then use it in your messages.

To use a content tag template:

1. Go to Content > Content Tags.
2. In the Content Tag Template area, select the checkbox for the content tag template you want to use.

   If you do not see the Content Tag Template area, Bronto has not provided any content tag templates for your account.
3. Click **Copy to Site**.
   This will add a copy of the template to your list of content tags. There is no limit to how many copies of a
   template you can make.

4. Find the copied template in your list of content tags and click on the template name to open it.
   The content tag has the same name as the tag you copied with **-Copy #** appended to it.

5. Click on the name and update it.
   The name you specify will be used to reference this block of content in the message editors or via the tag text. For
   example, if you name the Content Tag `mycontenttag`, the dynamic tag will be `%%@mycontenttag%%`.

6. Edit the content, as relevant, using the drag and drop editor.
   Content is added to a content tag by dragging Containers and Elements to the palette and using the options in the
   design menu to style the content. Because Containers, Elements, and Design menu options are the same in the
   drag and drop editor as they are in the email message editor, see
   - **Elements Palette** on page 57 for more information about adding text, buttons, images, etc.
   - **Containers Palette** on page 53 for more information about structuring your content tag.
   - **Design (Format) Message Content** on page 87 for more information about styling the elements within the
     content tag.

7. Optional: To change the width of the content tag:
   By default content tags have the same width as messages, 640 px.
   a) Click **Settings**.
   b) Click **Tag Design**.
   c) Select a width from the **Width** list.
   d) Click **Done**.

8. Click **Save**.

9. Use the content tag in a message.

---

### Headers And Footers

You can create headers and footers that can be used across multiple messages.

Footers are like email signatures. They can contain your unsubscribe link, your postal address, and any other
related information. Footers are very important because they can affect whether or not your message is CAN-SPAM
compliant.

Headers can be very valuable in creating a consistent look and feel for your emails. You can use headers create a
recognizable image for your emails that will help ensure the authenticity of your email and entice your contacts to
read further.

The **Message Headers And Footers** page allows you to view all of the headers and footers you have created in your
account. The following headers and footers are included by default:

- Default Footer
- Link to Online Version (Header)
- CAN-SPAM Compliant Footer
- SWYN Footer
You can click on the name of a specific header or footer on the Message Headers And Footers page to view information about a header or footer. You can also click on the HTML and Text tabs to view the HTML and text versions of a header or footer.

**View Footer: updated SWYN Footer**

For more information on CAN-SPAM compliance, see CAN-SPAM Act on page 200.

**Tip:** You can pick a default header and footer that will be selected by default when creating new email messages. For more information on selecting a default header and footer, see Select A Default Header And Footer For Emails on page 1335.

**Create Headers And Footers**

Using the Headers and Footers option on the Content Menu, you can create headers and footers you can use in your messages.

While it is fine to just use a default footer for all messages, building multiple headers and footers for each of your email marketing programs can help personalize and distinguish your messages. For example, the footer for your monthly newsletter might be different from the footer for your weekly update.
Create And Design

If you want part of your headers/footers to be consistent across all variations, use content tags to create re-usable blocks of content that you can re-purpose. For more information on content tags, see Content Tags on page 140.

Tip: You can pick a default header and footer that will be selected by default when creating new email messages. For more information on selecting a default header and footer, see Select A Default Header And Footer For Emails on page 1335.

To create a header or footer:

1. Go to Content > Headers & Footers.
2. Click either
   - Create New Footer
   - Create New Header

   You can not add headers to template messages.
3. Add a name for the header or footer in the Name text box.
4. In the HTML tab create the HTML version of your header or footer.

   For more information on working with the WYSIWYG editor, see Edit HTML Source Using The WYSIWYG Editor on page 103.
   a) For footers, add a link to a Manage Preferences page using the %%!manage_url%% Special tag.

   Footers must include a link to the Manage Preferences page in order to be CAN-SPAM compliant. You can either manually enter the Special Tag %%!manage_url%% or select Manage Preferences URL from the Special Tags on page 152 list.
5. Click the Text tab.
6. Add the content for the text version of the header or footer.

   You need both versions (text and HTML) of a footer so we can include the footer for both text and HTML versions of your message. The plain text footer accompanies plain text versions of your message and the HTML version accompanies HTML versions of your message.

   Note: In order to comply with the CAN-SPAM Act, we automatically include an opt-out link in all footers. For more information on CAN-SPAM compliance, see CAN-SPAM Act on page 200.
7. Click Save.

Edit Headers And Footers

You can edit your stored headers and footers.

To edit a header or footer:
1. Go to Content > Headers & Footers.
2. Click on either the
   - Pencil icon next to the header or footer you want to edit on the Message Headers And Footers page.
   - Name of the header or footer you wish to edit on the Message Headers And Footers page and the click Edit.
3. Make any edits needed to the name, HTML version, and text version of the header or footer.
4. Click Save.

### RSS Feeds

The RSS feeds provide a list of content, a brief description, and a link to the webpage with the full article.

RSS (Really Simple Syndication) technology allows internet users to subscribe to websites that provide RSS feeds. For example, in addition to reading the news headlines via email, you can read the latest news through bookmarks in your web browser, or through a RSS reader.

By using RSS, you can re-purpose (or syndicate) your email content via a separate medium, and give your audience another way to receive your message. As such, RSS is a great complement to your email marketing program. Also, RSS goes through the web, thus ensuring seamless (and trackable) delivery to your subscribers. Create a feed, link and promote it on your site, and you're well on your way towards creating a new communication channel with your audience.

**Note:** We do not enforce a cap on RSS feeds so you can create as many as you like. We recommend that you create separate feeds for separate email marketing programs. For instance, a feed for your monthly newsletter and a feed for your daily update.

### Create An RSS Feed

You can create an RSS feed.

Both the title and description you give to your RSS feed will appear in your subscriber's RSS feed reader. Make sure that they are brief and that they both describe the content of your feed.

To create an RSS Feed:

1. Go to Content > Feeds.
2. Click Create New Feed.
3. Give the feed a title in the Title text box.
4. Type a description for the feed in the Description text box.
5. Select the Expire type.
   - If you click the Days radio button, then you will need to specify the minimum number of messages in the feed and how many days messages will remain on this feed.
   - If you select the Number of Messages radio button for the Expire type, then you will only need to specify the maximum number of messages in the feed.
6. Click Save.

### Assign Messages To An RSS Feed

You can assign messages to an RSS feed.

To assign a message to an RSS feed, click Assign to Feeds on the Message Overview page of the message you wish to assign to the feed.
View Your RSS Feed In Bronto
You can preview your RSS feed in Bronto.

There are two different ways that you can view your RSS Feed. If you wish to view the details about your RSS Feed, then click on the name of the RSS Feed you wish to view on the Feeds Page. Here you can view the parameters you have set for the feed and any messages that are on the feed. To view the actual feed, click on the view feed icon.

View And Read The Content of Your RSS Feed
You can view and read the content of your RSS feed outside of Bronto.

There are 3 ways that you can read your feed:

- Use a piece of software called a Newsreader (or Aggregator). You can use these programs to "subscribe" to feeds. The software will scan the feeds that you have subscribed to and automatically let you know when the sites have updated. Example Newsreaders are FeedDemon (Windows), Bloglines (web-based), and NetNewsWire and Shrook (Mac OS X).
- Add it to your personal portal site - such as MyYahoo or MyMSN. Copy your Feed URL and add it as new content to your portal.
- View your feed through your web browser. Mozilla Firefox and Apple Safari both support RSS bookmarks.

View The RSS Feed URL
You can view the URL for your RSS feed.

To view the URL for your RSS feed, right click on the orange icon and choose Copy Link Location. This will copy your Feed URL so that you can paste into your news reader or web browser. Alternatively, click on the orange icon and your web browser will display your Feed URL in the address bar and the raw XML of your feed.

Embed Your RSS Feed In Your Website
You can embed your RSS feed on your site.

To embed your RSS feed in your website, you should add link rel="alternate" type="application/rss+xml" title="RSS" href="RSS_LINK" / in the "head" tag of your website.

By doing so, Mozilla Firefox will display an RSS icon on your site that allows visitors to easily subscribe to your RSS feed.

Promote your RSS feed in the same way that you promote your email newsletters - visibility on your home page, inclusion in marketing communications, etc. Also, browsers such as Firefox offer unique functionality that automatically display an icon to sites with embedded RSS feeds.
**QR Codes**

QR codes allow you to encode a URL into an image that you can add to email messages.

If a contact prints out the email, they can take a picture of the QR code with their smart phone and they will be redirected to the URL you specified for the QR code.

**Create A QR Code**

You can create a QR code to use it on your messages.

**Create New QR Code**

To create a QR Code:

1. Go to Content > QR Codes.
2. Click Create New QR Code.
3. Give the QR Code a name in the Name text box.
4. Specify the error correction level for the QR code.
   
   The higher the error correction level, the more likely the QR code will be able to properly read (or scanned) even if the code is damaged. However, the higher the error correction level, the larger the QR code image is. You can choose:
   
   - Low (7%)
   - Medium (15%)
   - High (25%)
   - Ultra (30%)

   **Warning:** If you manually alter the size of a QR code image, this will negatively affect the error correction level you set when the QR code was created. Because of this, we highly recommend you do not manually re-size QR code images after creating them.

5. Specify the zoom level to use for the QR code.

   The zoom level determines the pixel per square used in the QR code. To keep the QR code image a reasonable size, you should reduce the zoom level as the number of characters you are using in the URL increases.

6. Add the URL you want to encode in the **URL to encode** text box.

   When a contact scans the QR code, they are taken to this URL.

7. Click Save.

**Add QR A Code To An Email**

After you create a QR code you can add it to your email.

To add a QR code to an email message:
1. Go to Content > QR Codes.
2. Click on the name of the QR code you want to add to a message to.
3. Click on the QR code at the bottom of the QR code report to download the QR code image.
   The QR code image will be downloaded to your computer in .png format.
4. Create a new or edit an existing email message.
   You can do this by going to Messages > Messages and clicking on the name of an existing message, or by clicking Create New Message > Create Email Message.
5. Add the image to the body of the email message.
   The easiest way to do this is to use the WYSIWYG editor. For more information on adding images to email messages using the WYSIWYG editor, see Insert/Edit Images Using The WYSIWYG Editor on page 109.
6. Click Show Preview and make sure the QR code appears as expected.

**Download A QR Code Image**

Downloading a QR code allows you to use it in marketing material outside of the application (such as in print material), all while still maintaining the ability to track click related metrics for the QR code.

To download a QR code image:
1. Go to Content > QR Codes.
2. Click on the name of the QR code you want to add to a message to.
3. Click on the QR code at the bottom of the QR code report to download the QR code image.
   The QR code image will be downloaded to your computer in .png format.

**QR Code Detailed Click Metrics**

For each QR code, you can view metrics showing how many times the QR code was clicked, and how frequently it was clicked.

You can also view information about the URL encoded in the QR code, a preview of the QR code, and a link to download the QR code.

The report for a QR code lets you see how many times and how often the URL was clicked.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe • clicks link A 10 times • and clicks link B 5 times And Taylor Doe • clicks link B 5 times Then 20 total clicks are recorded.</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
</tr>
</tbody>
</table>
### Metric

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicks Per Day</td>
<td>The clicks per day metric represents the average number of clicks recorded per day.</td>
<td>The clicks per day metric is important because it represents a level of contact engagement and highlights the effectiveness of your marketing content.</td>
</tr>
<tr>
<td>Clicks Per Week</td>
<td>The clicks per week metric represents the average number of clicks recorded per week.</td>
<td>The clicks per week metric is important because it represents a level of contact engagement and highlights the effectiveness of your marketing content.</td>
</tr>
<tr>
<td>Clicks Per Month</td>
<td>The clicks per month metric represents the average number of clicks recorded per month.</td>
<td>The clicks per month metric is important because it represents a level of contact engagement and highlights the effectiveness of your marketing content.</td>
</tr>
</tbody>
</table>

### View The URL Information For A QR Code

The URL Information lets you view the shortened version of the URL that the QR code points to.

You can also view the date the QR was created and the full URL the QR Code points to.

![URL Information](image)

### Message Personalization

Bronto provides several ways you can personalize messages for specific contacts, or groups of contacts, in order to improve the success of your marketing campaigns.

Using message personalization to target your marketing campaigns is the best and most efficient way to improve your ROI. There are two methods you can use to personalize Bronto messages:

- **Dynamic Content** allows you to apply conditional logic to content in a message. When a contact is sent a message with dynamic content, Bronto checks to see if the contact meets the criteria you specified. If they do, they will see the dynamic content. If the contact doesn't meet to conditional logic, they will not see it. Dynamic content is useful when you want to have different versions of a message for groups of contacts. For example you can use this to provide contacts on a loyal-customer segment a special discount that contacts not on this segment would not see in the message.

- **Message Tags** allow you to create a placeholder that will be replaced by the associated content specific to a contact. This placeholder could represent something about the contact, such as their name, or something about a product or order, such as an image or shipping date. There are several types of message tags and each one relates to a different type of information in Bronto's database.

Generally, you can think of dynamic content as targeting groups of contacts and message tags as targeting individual contacts. If you want groups of contacts to see different sales items in an email based on known preferences, you would use dynamic content. If you want contacts to see different sales items in an email based on items that were left in their carts, you would use cart/order message tags.

### Message Tags

There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.
Message tags allow you to do things like address a contact by their first name, send product recommendations based on products a contact has shown interest in, use the API to use data stored outside of Bronto into a message, or include an unsubscribe URL.

Types of Message Tags

There are a number of message tags that you can use to personalize your email and SMS messages. A tag represents a piece of variable data and different types of data are represented by different types of tags. Each type has its own unique syntax so that Bronto can recognize the tag and manage it appropriately. Types of tags include:

- **Field Tags**: Map to stored contact data. Example: `%%firstname%%` For more information, see Field Tags on page 151.
- **Special Tags**: Map to default, Bronto-managed data. Example: `%%unsubscribe_url%%` For more information, see Special Tags on page 152.
- **RFM Tags**: Map to the RFM metrics collected for a contact. Example: `%%rfm_newest_order_date%%` For more information, see RFM Field Tags on page 152.
- **Cart/Order Tags**: Map to data collected from shopping carts. Example: `%%cart.discount%%` For more information, see Add Cart and Order Data To A Message on page 175. Your account must be configured to pass cart and order data to Bronto in order to use this type of tag.
- **Product Tags**: Map to imported product data. Example: `%%product.placeholder.field%%` For more information, see Product Tags on page 170.
- **API Message Tags**: Unlike other tags, these tags do not map to Bronto-stored data. Instead, you can use this type of tag to insert HTML content into the body and subject line of messages using the API. Typically you would use these tags to include data stored outside of Bronto in your messages. Example: `%%userdefined%%` For more information, see API Message Tags on page 160.

**Note**: While content tags are a type of tag you can use in a message, they are not a type of message tag. Content tags allow you to create reusable "blocks" of content that you can use in messages; they can only pass contact-specific content if you use a message tag within the content tag or make the content tag dynamic. See Content Tags on page 140 for more information.

In addition to these message tags, you can use loops with both API Message tags and Cart/Order tags. Loops save message design time by allowing you to include an array of data by providing multiple message tags within the opening and closing loop tag. For example, you can use a cart loop to include the product name, description, and image for all products that were in an abandoned cart. For more information see Cart Loop Tags on page 176 and API Loop Tags on page 163.

**Note**: When working with email, only the email message editor, HTML/WYSIWYG editor, and email template editor can support tags.

Tag Formatting Guidelines

In order for tags to work properly, they must be properly formatted. All message tags:

- Must begin and end with `%%`. For example, `%%!contact_eid%%`.
- Require specific, additional formatting rules that must be followed. For example, cart and order tags require a `$` after the opening `%%: %s%cart.createdate%`.

Special, RFM, Product, and Cart/Order tags can:

- Only use lowercase characters.

**Note**: Field tags can use uppercase, but will be case sensitive when you use mixed case.

Special, RFM, Product, Field, and Cart/Order tags cannot:

- Contain spaces.
- Use any of the following characters within the body of the tag:
  - `%`
  - `<`
If you’re using the email message editor to design messages, we recommend you use the Insert menu to add tags to your message. When you use the Insert menu, the editor automatically use the correct tag format.

**How Tags Are Replaced With Real Content**

Messages tags are variables that can be added to a message as a placeholder that will be replaced with real content. Most tags are replaced with content at the time a message is sent. However, some tags are replaced with content at the time a message is scheduled for delivery. Handling some tags at the time a message is scheduled, versus handling all of the tags at the time a message is sent, allows Bronto to expedite the delivery of messages. The following tags are pulled into a message at the time a future delivery is scheduled:

- All Content Tags
- %%!account_address1%%
- %%!account_address2%%
- %%!account_cc_email%%
- %%!account_city%%
- %%!account_country%%
- %%!account_email%%
- %%!account_firstname%%
- %%!account_lastname%%
- %%!account_organization%%
- %%!account_state%%
- %%!account_telephone%%
- %%!account_zip%%
- %%!message_api_id%%
- %%!message_id%%
- %%!subject%%
- %%!account_address%%

If you want to change the content for one of these tags in a scheduled message, you can:

1. Cancel the delivery.
2. Change the message content.

**Field Tags**

Field tags let you personalize your email or SMS messages for each contact who receives the message.

Field tags use the contact data stored in Bronto contacts fields to populate email and SMS message content. At message send time Bronto looks up the value stored for the contact field for and replaces the field tag with the saved data specific to a contact.

To create field tags, add %% to either side of the internal name for the field. For example, if you have fields named:

- firstname
- favteam

then you could include this data using the corresponding tags:

- %%firstname%%
- %%favteam%%

and it would look like this to a contact who receives the message:

- Bob
- Mighty Ducks
Because contact fields are specific to each Bronto account there isn't a list of default field tags. You can use any contact field you created for your account as a field tag by applying the correct syntax to it.

**RFM Field Tags**
RFM data field tags allow you to dynamically add RFM data to the body of your message.

You can add RFM data field tags to your message manually using the syntax shown below, or select a specific tag from the Field Tags menu in the WYSIWYG or email message editors.

The following RFM data field tags are supported:

<table>
<thead>
<tr>
<th>RFM Data Tag Name</th>
<th>RFM Data Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFM Total Revenue</td>
<td>%%rfm_total_revenue%%</td>
<td>The Total Revenue metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
</tr>
<tr>
<td>RFM Average Order Value</td>
<td>%%rfm_average_revenue%%</td>
<td>The Average Order Revenue metric represents the average amount of revenue recorded for the contact when they place an order.</td>
</tr>
<tr>
<td>RFM Last Order Total</td>
<td>%%rfm_last_order_revenue%%</td>
<td>The Last Order Total represents the amount of revenue recorded for the most recent order.</td>
</tr>
<tr>
<td>RFM First Order Date</td>
<td>%%rfm_oldest_order_date%%</td>
<td>The First Order Date represents the date of the first order recorded for the contact.</td>
</tr>
<tr>
<td>RFM Last Order Date</td>
<td>%%rfm_newest_order_date%%</td>
<td>The Last Order Date represents the date of the most recent order recorded for the contact.</td>
</tr>
<tr>
<td>RFM Total Orders</td>
<td>%%rfm_order_count%%</td>
<td>The Total Orders metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.</td>
</tr>
</tbody>
</table>

Tip: For more information on viewing per contact RFM data, see Contact Details Order Data on page 924.

**Related Topics**
Contact Details Order Data on page 924

**Special Tags**
Special tags can be used to customize messages based on commonly used data in Bronto.

Special tags represent the default tags that we provide in your account. When an email or SMS message is sent, special tags are replaced with data from your account.

The different types of special tags are described below.

<table>
<thead>
<tr>
<th>Special Tag Name</th>
<th>Special Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipient Email</td>
<td>%%!contact_email%% or %email%%</td>
<td>Adds the contact's email address.</td>
</tr>
<tr>
<td>Recipient External Id (Email Only)</td>
<td>%%!contact_eid%%</td>
<td>Displays the external id of the contact. This is the same id used in the API.</td>
</tr>
<tr>
<td>Special Tag Name</td>
<td>Special Tag Syntax</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Recipient Mobile Phone Number</td>
<td>%!contact_mobile_phone_number%</td>
<td>Displays the mobile phone number stored for the contact.</td>
</tr>
<tr>
<td>Recipient Twitter Account</td>
<td>%!contact_twitter%</td>
<td>The contact's Twitter name/handle, if present.</td>
</tr>
<tr>
<td>Recipient Facebook Account</td>
<td>%!contact_facebook%</td>
<td>The first and last name used in a contact's Facebook profile, if present.</td>
</tr>
<tr>
<td>Recipient Created Date/Time</td>
<td>%!subscribe_date%</td>
<td>Displays the date the contact was created in the date format you have choose for your account.</td>
</tr>
<tr>
<td>Recipient Created UTC Timestamp</td>
<td>%!subscribe_timestamp%</td>
<td>Displays the contacts creation date and time in the date format you have chooses for your account, plus &quot;-h:mm(am</td>
</tr>
<tr>
<td>Reply Tracking Email (Email Only)</td>
<td>%!reply_email%</td>
<td>Adds the email address provided when you enable Reply Tracking for an email message.</td>
</tr>
<tr>
<td>Company Contact First Name</td>
<td>%!account_firstname%</td>
<td>The first name added in the contact information section on the Contact Information Settings page (Go to Home &gt; Settings &gt; Contact Info).</td>
</tr>
<tr>
<td>Company Contact Last Name</td>
<td>%!account_lastname%</td>
<td>The last name added in the contact information section on the Contact Information Settings page (Go to Home &gt; Settings &gt; Contact Info).</td>
</tr>
<tr>
<td>Company Name</td>
<td>%!account_organization%</td>
<td>The organization name added in the contact information section on the Contact Information Settings page (Go to Home &gt; Settings &gt; Contact Info).</td>
</tr>
<tr>
<td>Formatted Company Address (Email Only)</td>
<td>%!account_address%</td>
<td>The fully formatted full address that is added in the contact information section on the Contact Information Settings page (Go to Home &gt; Settings &gt; Contact Info).</td>
</tr>
<tr>
<td>Company Telephone</td>
<td>%!account_telephone%</td>
<td>The telephone number added in the contact information section on the Contact Information Settings page (Go to Home &gt; Settings &gt; Contact Info).</td>
</tr>
<tr>
<td>Special Tag Name</td>
<td>Special Tag Syntax</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Company Email</td>
<td>%%!account_email%%</td>
<td>The email address added in the contact information section on the Contact Information Settings page (Go to <a href="#">Home &gt; Settings &gt; Contact Info</a>).</td>
</tr>
<tr>
<td>Company Address 1</td>
<td>%%!account_address1%%</td>
<td>The first line of the address added in the contact information section on the Contact Information Settings page (Go to <a href="#">Home &gt; Settings &gt; Contact Info</a>).</td>
</tr>
<tr>
<td>Company Address 2</td>
<td>%%!account_address2%%</td>
<td>The second line of the address added in the contact information section on the Contact Information Settings page (Go to <a href="#">Home &gt; Settings &gt; Contact Info</a>).</td>
</tr>
<tr>
<td>Company City</td>
<td>%%!account_city%%</td>
<td>The city added in the contact information section on the Contact Information Settings page (Go to <a href="#">Home &gt; Settings &gt; Contact Info</a>).</td>
</tr>
<tr>
<td>Company State</td>
<td>%%!account_state%%</td>
<td>The state added in the contact information section on the Contact Information Settings page (Go to <a href="#">Home &gt; Settings &gt; Contact Info</a>).</td>
</tr>
<tr>
<td>Company Zip</td>
<td>%%!account_zip%%</td>
<td>The zip code added in the contact information section on the Contact Information Settings page (Go to <a href="#">Home &gt; Settings &gt; Contact Info</a>).</td>
</tr>
<tr>
<td>Company Country</td>
<td>%%!account_country%%</td>
<td>The full name of the country added in the contact information section on the Contact Information Settings page (Go to <a href="#">Home &gt; Settings &gt; Contact Info</a>).</td>
</tr>
<tr>
<td>Manage Preferences URL (Email Only)</td>
<td>%%!manage_url%%</td>
<td>Provides a link to the Manage Preferences webform which allows contacts to unsubscribe and/or edit any information you are storing - email address, name, phone number, etc. This should never be used as an image link. By default, this tag will use the default Manage Preference webform for your account. To use a specific webform, add _webformID after url. For example, %%!manage_url_17702%%. You can find a webform's ID on the Webforms page on page 204.</td>
</tr>
<tr>
<td>Special Tag Name</td>
<td>Special Tag Syntax</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-----------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unsubscribe URL (Email Only)</td>
<td><code>%%!unsubscribe_url%%</code></td>
<td>Provides a direct link to the Unsubscribe page. The contact will still be presented with a button to press to confirm this action. This link, unlike Manage Preferences, does not provide the ability to change email address or update contact information. This should never be used as an image link. By default, this tag will use the default Unsubscribe URL webform for your account. To use a specific webform, add <code>_webformID</code> after <code>url</code>. For example, <code>%%!unsubscribe_url_17702%%</code>. You can find a webform's ID on the Webforms on page 204 page.</td>
</tr>
<tr>
<td>Complaint URL (Email Only)</td>
<td><code>%%!complaint_url%%</code></td>
<td>Adds a link to the Complaint webform. Complaint webforms allow contacts to report unsolicited email they have received from you. When a contact submits a Complaint webform, they will be unsubscribed and marked as Inactive. Providing a simple way for contacts to report unsolicited email helps to ensure that you only send to contacts who want to receive email from you. By default, this tag will use the default Complaint URL webform for your account. To use a specific webform, add <code>_webformID</code> after <code>url</code>. For example, <code>%%!complaint_url_17702%%</code>. You can find a webform's ID on the Webforms on page 204 page.</td>
</tr>
<tr>
<td>Forward to Friend URL (Email Only)</td>
<td><code>%%!forward_url%%</code></td>
<td>Provides a link to a Forward to a Friend form which allows the contact to forward the email message to a colleague and includes a personal message at the top.</td>
</tr>
<tr>
<td>Special Tag Name</td>
<td>Special Tag Syntax</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Message URL (Email Only)</td>
<td>%message_url%</td>
<td>The %message_url% tag allows the contact to click through to view the email in a browser outside of their email client. This may be helpful if the contact doesn't know how to load images, is seeing a malformed email due to rendering issues, or is viewing a text only version of the email. This should never be used as an image link. In the HTML version of the email message, only a URL linking to the email message is added. In the plain text version of the email message, this tag includes the text &quot;View an HTML version of this message:&quot; followed by the link to the email message. If you add text around the %message_url% tag in the HTML version of the email message, remember that the &quot;View an HTML version of this message:&quot; will still be appended to the tag in the text version of the email message. If you add text around the %message_url% tag in the HTML version of your email message, use the %preview_url% tag described below in the text version of your email message, instead of the %message_url%.</td>
</tr>
<tr>
<td>Message Name</td>
<td>%message_name%</td>
<td>The %message_name% tag allows you to insert the message name.</td>
</tr>
<tr>
<td>Text Message URL (Email Only)</td>
<td>%text_message_url%</td>
<td>Provides a link to the online text version of the email message.</td>
</tr>
<tr>
<td>Message Subject (Email Only)</td>
<td>%subject%</td>
<td>Displays the subject line used for the email message</td>
</tr>
<tr>
<td>Message Id</td>
<td>%message_id%</td>
<td>The id associated with the version of the message used in the delivery.</td>
</tr>
<tr>
<td>API Message Id</td>
<td>%message_api_id%</td>
<td>The API id for the message used in the delivery.</td>
</tr>
<tr>
<td>Confirm URL (Email Only)</td>
<td>%confirm_url%</td>
<td>URL to Confirm Subscription to List; Use this tag in confirmation/subscription email messages.</td>
</tr>
<tr>
<td>Month (name)</td>
<td>%month%</td>
<td>Full month name. e.g. December.</td>
</tr>
<tr>
<td>Month (numeric)</td>
<td>%month_num%</td>
<td>Numerical value for the month e.g. If it was December, then 12 would be displayed.</td>
</tr>
<tr>
<td>Special Tag Name</td>
<td>Special Tag Syntax</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Year (numeric)</td>
<td><code>%%!year%%</code></td>
<td>Full year, e.g. 2008.</td>
</tr>
<tr>
<td>Day of Month (numeric)</td>
<td><code>%%!day_of_month%%</code></td>
<td>The day of the month e.g. a numerical value of 1 to 31 depending on the day.</td>
</tr>
<tr>
<td>Day of Week (e.g. Sunday)</td>
<td><code>%%!weekday%%</code></td>
<td>Day of week, e.g. Friday.</td>
</tr>
<tr>
<td>Formatted Date (e.g. July 4, 2008)</td>
<td><code>%%!date%%</code></td>
<td>English version of the date, e.g. October 12, 2008</td>
</tr>
<tr>
<td>Custom Date Format Tags</td>
<td><code>%%!formatdate.(&lt;format&gt;).(&lt;field&gt;)%%</code></td>
<td>Allows dates to be formatted according to custom format strings.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <code>&lt;format&gt;</code> is a optional date format String. This table lists the allowed characters that can be used in date formats. If not specified, your site's formatting preferences are used.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <code>&lt;field&gt;</code> is an optional date type contact field. When provided, the value of this field is the date used. When not provided, the send date will be used.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Some examples of how this may be used:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <code>%%!formatdate.(YYYY MM dd)%%</code> for the send date in year, month, day format.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <code>%%!formatdate.(MM dd). (contactfield)%%</code> for the contact field date in month and day format. For example, you might want to use the birthday contact field.</td>
</tr>
<tr>
<td>Special Tag Name</td>
<td>Special Tag Syntax</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Apply Basic Math To Tags | `%%!formatdate.(<format>). (<field>).(<math>)%%` | Allows dates to be formatted according to custom format strings and provides functionality for simple math operations on a date, such as adding two weeks.  
  - `(<format>)` is an optional date format String. This table lists the allowed characters that can be used in date formats. If not specified, your site's formatting preferences are used.  
  - `(<field>)` is an optional date type contact field. When provided, the value of this field is the date used. When not provided, the send date will be used.  
  - `(<math>)` is an optional math String that can use plus or minus with a numeric time measurement that can be any of YMWDhms. (Year, Month, Week, Day, hour, minute, second)  
    Some examples of how this may be used:  
    - `%%!formatdate.(YYYY MM dd). (,-2W)%%` to target two weeks before the send date.  
    - `%%!formatdate.(). (subscriberfield).(+1M)%%` for one month after the send date using your site's default date format. |
<p>| UTC Timestamp            | <code>%%!utctimestamp%%</code>      | UTC timestamp, e.g. 2009-01-22 21:00 UTC                                                                                                   |</p>
<table>
<thead>
<tr>
<th>Special Tag Name</th>
<th>Special Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forward To A Friend Note (Email Only)</td>
<td>%%!ftaf_note%%</td>
<td>Displays the content added to the Note to Friend special purpose content block in the default Forward to a Friend webform in your account. <strong>Tip:</strong> For more information on the Note to Friend special purpose content block used in webforms, see Add Special Purpose Content Blocks To Your Webform on page 216. By default, this tag will use the default Forward To A Friend webform for your account. To use a specific webform, add _webformID after url. For example, %%!ftaf_url_17702%%. You can find a webform's ID on the Webforms on page 204 page.</td>
</tr>
<tr>
<td>N/A</td>
<td>%%!preview_url%% (Email Only)</td>
<td>The %%!preview_url%% tag only works if you add it to the text version of an email message. It provides a URL that links to the email message with no appended text. No additional text is included in the plain text version of the email message, as is the case with the %%!message_url%% tag. Use the %%!preview_url%% in place of the %%!message_url%% tag in the text version of your email message if you have text around the %%!message_url%% tag in the HTML version of your email message.</td>
</tr>
<tr>
<td>N/A</td>
<td>%%!success%% (Email Only)</td>
<td>Mainly for use in the webform displayed to contacts when they successfully submit another webform. This tag displays the text added in the Success Message text box on the Form Settings page for the webform being submitted. <strong>Tip:</strong> For more information, see Display The Success Message When Content Added To Webforms on page 240.</td>
</tr>
</tbody>
</table>

**Warning:** The %%!tracksent_key%% special tag was deprecated for all new messages effective May 2010.
How Special/Field Tags Affect Link Tracking

Links in an email may include a special tag or field tag. A common example is a user id or email address appended to a link as a parameter. For example, in the link below, custid might be a field in your account and %%custid%% is the corresponding field tag.

http://mysite.com/foo/bar?sale=3322fe&custId=%%custid%%

Below are some examples of links which contain tags.

<a href="http://mysite.com/foo/bar?sale=3322fe&custId=%%custid%">My Site</a>

<a href="http://mysite.com/foo/%%sometag%">My Site</a>

<a href="%%sometag%">My Site</a>

Tip:
You can pass in an entire link via a field tag or API message tag. For example, you could pass in:

<a href="%%sometag%">My Site</a>

This link will be tracked. When viewing a click report for the message or delivery, the links created using field tags or API message tags (and their associated metrics) will appear in the grid showing link level metrics as All Dynamic Links.

API Message Tags

API Message tags allow you to include data stored outside of Bronto in your messages when you send messages using the API.

API message tags are user defined tags that allow you to insert HTML content into the body and subject line of messages using the API. The content you add via API message tags will be added to the message at send time. These tags are useful if you want to sync content from your system (database, CRM, etc.) with messages you send with the platform. You will need to call addDeliveries in order to use API message tags.

The syntax for creating an API message tag is %%%userdefined%%%, where userdefined can be anything you want it to be. As part of the addDeliveries call you will map the appropriate content for each tag you define. You will need to use a slightly different syntax when using API message tags within loop tags. For more information on using API message tags within loop tags, see API Loop Tags on page 163.

You can use API tags within dynamic code to achieve more complex results than just simply passing a value into Bronto. For example, you could use if else conditional tags to display different content in a message based on which conditional is met. For more information see Dynamic Code on page 190 and Dynamic Code Tags on page 191.

Warning: The userdefined portion of API message tags cannot contain underscores followed by a number (tag_9), or number/hash symbols (#). Underscores followed by text are permitted (tag_name).
Create And Design

For example tags in your message

![API Message Tags]

might look like this after content is passed in using the API

![Content passed in from the API]

Here is an example of what the **addDeliveries** call for that message might look like:

```php
<?php
/**
 * API VERSION 4
 * This example will create a delivery to send a message to a single
 * contact. It assumes you have already created a message containing
 * the following API messages tags: %%#purchasetable%% and
 * %%#cardlast4%%.
 */

$client = new SoapClient('https://api.bronto.com/v4?wsdl', array('trace' => 1,
    'features' => SOAP_SINGLE_ELEMENT_ARRAYS));

try {
    // Replace with a valid API token
    $token = "INSERT A VALID API TOKEN";

    print "logging in\n";
    $sessionId = $client->login(array('apiToken' => $token))->return;

    $session_header = new SoapHeader("http://api.bronto.com/v4",
        'sessionId',
        array('sessionId' => $sessionId));
    $client->__setSoapHeaders(array($session_header));

    // Get the id of the message you wish to send. It may be more
    // efficient to hardcode the ID here, depending on your own
    // usage scenario(s).
    // Replace the placeholder text with the name of a message
    // in your account.
    $messageFilter = array('name' => array('operator' => 'EqualTo',
        'value' => 'SOME MESSAGE NAME',
    ));
```
Create And Design

$message = $client->readMessages(array('pageNumber' => 1,
  'includeContent' => false,
  'filter' => $messageFilter))
  )->return[0];
if (!$message) {
  print "There was an error retrieving your message.\n"
  exit;
}

// Get the id of the contact you will be sending to. It may be
// more efficient to hardcode the ID here, depending on your
// own usage scenario(s).
// Replace the placeholder text with the email address
// of the contact you want to send to.

$contactFilter = array('email' => array('operator' => 'EqualTo',
  'value' => 'SOME EMAIL ADDRESS'));
$contact = $client->readContacts(array('pageNumber' => 1,
  'includeLists' => false,
  'filter' => $contactFilter))
  )->return[0];
if (!$contact) {
  print "There was an error retrieving your contact.\n"
  exit;
}

// Make delivery start timestamp
$now = date('c');

$recipientObject = array('type' => 'contact',
  'id' => $contact->id);

// Create an array of delivery parameters including the content
// which will be displayed in place of the API message tags.
// Replace the placeholder text for the from name and from
// email address.

(delivery = array();
$delivery['start'] = $now;
$delivery['messageId'] = $message->id;
$delivery['fromName'] = 'EXAMPLE FROM NAME';
$delivery['fromEmail'] = 'EXAMPLE FROM EMAIL ADDRESS';
$delivery['recipients'] = array($recipientObject);

// If the contact prefers HTML, they will receive the content below:

$delivery['fields'][] = array('name' => 'purchasetable', 'type' => 'html',
  'content' => '<table border="1px"><tbody><tr><th>Item</th><th>Quantity</th><th>Price</th></tr><tr><td>Soccer Ball</td><td>3</td><td>123.87</td></tr></tbody></table>');
$delivery['fields'][] = array('name' => 'cardlast4', 'type' => 'html',
  'content' => '7239');
$deliveries[] = $delivery;

$parameters = array('deliveries' => $deliveries);
$res = $client->addDeliveries($parameters)->return;
if ($res->errors) {
print "There was a problem scheduling your delivery:\n";
print $res->results[$res->errors[0]]->errorString . "\n";
} else {
    print "Delivery has been scheduled. Id: " . $res->results[0]->id . "\n";
}
} catch (Exception $e) {
    print "uncaught exception\n";
    print_r($e);
}
?>

For another example of using API message tags, see Transactional Emails on page 294.

Tip:
You can pass in an entire link via a field tag or API message tag. For example, you could pass in:

<a href="%%sometag%%">My Site</a>

This link will be tracked. When viewing a click report for the message or delivery, the links created using field tags or API message tags (and their associated metrics) will appear in the grid showing link level metrics as All Dynamic Links.

Related Topics
Transactional Emails on page 294
addDeliveries API

API Loop Tags
API loop tags allow you to use Bronto's API to add an array of content to a message.

API loop tags are specially formatted API message tags that allow content to be passed in via API Message tags as an array. This an especially useful feature to use with transactional email messages. For example, if you are using transactional email messages to send receipts and you need to send back a receipt containing multiple purchases (say if a contact purchases more than one item from you during a single visit), you can use loop tags to create an array containing the relevant receipt information for each item purchased.

Warning: loop tags are an advanced feature and require comfort with dynamic code, programming, and the use of our API.

Note: loop tags can only be used in the body of email messages. loop tags placed in the subject line of email messages will not work.

Tip: For more information on API message tags, see API Message Tags on page 160.

Below is an example of loop tags used in the context of transactional email messages.

To make use of loop tags:

1. Add {dynamic_code}{loop}{/loop}{/dynamic_code} tags to an email message as shown below. Notice the {{{item_#}}} portion of the code. This a modified API Message Tag used specifically in loop tags.

{dynamic_code}
Tip: In the example above, notice how the dynamic code and loop tags have been placed inside of an HTML table. This was done so the content brought in via the loop tags will display nicely in a table. It is perfectly ok to do this, but you will need to TURN OFF the WYSIWYG editor (as is the case above) when working with dynamic code and HTML. The WYSIWYG editor attempts to correct what it sees as mistakes in HTML and will thus produce unintended results if it encounters dynamic code embedded in HTML. To turn off the WYSIWYG editor, click WYSIWYG Editor Off next to the Subject Line text box.

2. Call `addDeliveries`. When you call `addDeliveries`, the array of fields you specify in the function will look for the special loop API message tags and replace them with the content you specify in the `messageFieldObject`. Essentially, the loop tags will loop through each `messageFieldObject` specified in the function call. For each `messageFieldObject` encountered in the loop, the content added for the `messageFieldObject` will be added to the message, starting with the first array item, and continuing until the last item in the array is encountered. If no content value is added for a `messageFieldObject`, then that particular `messageFieldObject` will be skipped over in the loop. Below you can find a modified version of the code example found on the `addDeliveries` page of the API site. This code sends a message containing the example loop tags above, and replaces them with some generic content.

```php
<?php
/**
 * This example will create a delivery to send a message to a single contact. This example also contains code to add content via loop tags to the message and assumes the message already has the appropriate loop tags added. You must edit the code to refer to the message name you wish to send, and change the email address of the contact to be a valid contact in your account.
 **/  
$client = new SoapClient('https://api.bronto.com/v4?wsdl', array('trace' => 1, 'features' => SOAP_SINGLE_ELEMENT_ARRAYS));
setlocale(LC_ALL, 'en_US');

try {
    $token = "ADD YOUR API TOKEN HERE";
```
print "logging in\n"

$sessionId = $client->login(array('apiToken' => $token))->return;

$session_header = new SoapHeader("http://api.bronto.com/v4",
    'sessionHeader',
    array('sessionId' => $sessionId));
$client->__setSoapHeaders(array($session_header));

// get the id of the message you wish to send. It would be more
// efficient to hardcode the ID here, and you may choose to do
// that based on your own usage scenario(s).
$messageFilter = array('name' => array('operator' => 'EqualTo',
    'value' => 'NAME OF YOUR MESSAGE HERE',
),
);
$message = $client->readMessages(array('pageNumber' => 1,
    'includeContent' => false,
    'filter' => $messageFilter)
)->return[0];
if (!$message) {
    print "There was an error retrieving your message.\n"
    exit;
}

// get the id of the contact you will be sending to. It would be
// more efficient to hardcode the ID here, and you may choose to do
// that based on your own usage scenario(s).
$contactFilter = array('email' => array('operator' => 'EqualTo',
    'value' => 'RECIPIENT_EMAIL@EXAMPLE.COM' ),
);
$contact = $client->readContacts(array('pageNumber' => 1,
    'includeLists' => false,
    'filter' => $contactFilter)
)->return[0];
if (!$contact) {
    print "There was an error retrieving your contact.\n"
    exit;
}

// make delivery start timestamp
$now = date('c');

$recipientObject = array('type' => 'contact',
    'id' => $contact->id);
/*
Create an array of delivery parameters including the content
which will be displayed by the loop tags added in the example
message.
*/
$delivery = array();
$delivery['start'] = $now;
$delivery['messageId'] = $message->id;
$delivery['fromName'] = 'API Robot';
$delivery['fromEmail'] = 'api_test@example.com';
$delivery['recipients'] = array($recipientObject);
/**
 * Notice below that when you reference the name of the loop tag via
 * the API, be sure to leave off the "%%% #%%" portion of the tag.
 * You will build an array using individual API message tags which
 * are named as follows: <basename>_<number>. For example,
 * name => item_1, rather than name => %%%item_%%%.
 **/
$delivery['fields'][] = array('name' => 'productname_0', 'type' => 'html', 'content' => 'A Cool Shirt');
$delivery['fields'][] = array('name' => 'productname_1', 'type' => 'html', 'content' => 'Some Nice Shoes');
$delivery['fields'][] = array('name' => 'productname_2', 'type' => 'html', 'content' => 'A Trendy Hat');
$delivery['fields'][] = array('name' => 'productprice_0', 'type' => 'html', 'content' => '$20.99');
$delivery['fields'][] = array('name' => 'productprice_1', 'type' => 'html', 'content' => '$50.99');
$delivery['fields'][] = array('name' => 'productprice_2', 'type' => 'html', 'content' => 'FREE!');
$deliveries[] = $delivery;

$params = array('deliveries' => $deliveries);

$res = $client->addDeliveries($params)->return;
if ($res->errors) {
    print "There was a problem scheduling your delivery:\n";
    print $res->results[$res->errors[0]]->errorString . "\n";
} else {
    print "Delivery has been scheduled. Id: " . $res->results[0]->id . "\n";
}
}
}

3. In order to see if your loop tags are functioning as expected, we suggest scheduling some test deliveries and viewing the results. Loop tags get processed at send time, so you won't be able to view the end result of adding in these tags in email message previews or a dynamic preview. Below is an example of what the email message above will look like after it has been sent and the content called via the loop tag has been added:

This is an example message that shows how to properly use loop tags. After the message is sent, the content contained in each item in the loop will be displayed.

Thank You For Purchasing The Following Items:

<table>
<thead>
<tr>
<th>Item #</th>
<th>Item Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A Cool Shirt</td>
<td>$20.99</td>
</tr>
<tr>
<td>2</td>
<td>Some Nice Shoes</td>
<td>$50.99</td>
</tr>
<tr>
<td>3</td>
<td>A Trendy Hat</td>
<td>FREE!</td>
</tr>
</tbody>
</table>

Note: loop tags will not affect the functionality of regular API message tags. Regular API message tags will continue to function as expected.

Warning:

Loop tags placed within a URL are not supported. For example, the link below will not work:

<a href="www.google.com/{dynamic_code}{loop}item:%%#item_#%\ndescription:%%#description_#%/(loop){/dynamic_code}"></a>

Related Topics
addDeliveries

Use Loop Tags In Template Messages
Both API message tags and loop tags can be used in the body of template messages. Depending on the type of block you are editing, there are certain limitations present when using loop tags in HTML tables.

Tip: While using loop tags in templates is possible, there are certain limitations that must be taken into consideration. For the best results, we suggest using loop tags in an HTML message. For more information on creating HTML messages, see Create Email: WYSIWYG Editor on page 100 and Create Email: HTML Code Editor on page 102.

- If you are editing a block using the WYSIWYG editor, loop tags cannot be placed within an HTML element. For example:

```html
<table border="1px">
  <tbody>
    <tr>
      <th>Product Name</th>
      <th>Product Price</th>
    </tr>
    {dynamic_code}
    {loop}
    <tr>
      <td>%%#productname_%%</td>
      <td>%%#productprice_%%</td>
    </tr>
    {/loop}
    {/dynamic_code}
  </tbody>
</table>
```

Notice the loop tags are contained within the table and tbody HTML elements.

Tip: In the example above, notice how the dynamic code and loop tags have been placed inside of an HTML table. This was done so the content brought in via the loop tags will display nicely in a table. It is perfectly ok to do this, but you will need to TURN OFF the WYSIWYG editor (as is the case above) when working with dynamic code and HTML. The WYSIWYG editor attempts to correct what it sees as mistakes in HTML and will thus produce unintended results if it encounters dynamic code embedded in HTML. To turn off the WYSIWYG editor, click WYSIWYG Editor Off next to the Subject Line text box.

You can still use loop tags in template blocks that use the WYSIWYG editor, just not loop tags contained inside of HTML elements. The following will work as expected:

```html
<p>Some Content</p>
{dynamic_code}
{loop}
  %%#productname_%%
  %%#productprice_%%
{/loop}
{/dynamic_code}
<p>Some More Content</p>
```
• If you are editing a template block using a plain large text box, _loop_ tags can be placed within the table HTML elements, however formatting issues arise if you attempt to add a border property to the table. For example:

```html
<table>
<thead>
<tr><th>Product Name</th><th>Product Price</th></tr>
</thead>
<tbody>
<tr>{/dynamic_code}
<tr>{loop}
  <td>%%#productname_%%</td>
  <td>%%#productprice_%%</td>
{/loop}
{/dynamic_code}
</tbody>
</table>
```

**Tip:** For more information on using _loop_ tags, see [API Loop Tags](#) on page 163.
Tip: For more information on using API message tags, see API Message Tags on page 160.

Add Content To An SMS Message With API Message Tags

API message tags are user defined tags that allow you to insert text into the body an SMS message using the API. The content you add via API message tags will be added to the SMS message at send time. These tags are useful if you want to sync content from your system (database, CRM, etc.) with SMS messages you send in the application.

Tip: You will need to call addSMSDeliveries in order to use API message tags.

Creating A Message With API Message Tags

The syntax for creating an API message tag is %%#userdefined%%, where userdefined can be anything you want it to be.

Warning: The userdefined portion of API message tags cannot contain underscores followed by a number (tag_9), or number/hash symbols (#). Underscores followed by text are permitted (tag_name).

Create SMS Message

Example content passed in from the API

Example addSMSDeliveries Call

```php
<?php

/**
 * API Version 4
 * This example will create an SMS delivery and send it to an entire keyword. This example
```
Create And Design

* also demonstrates how to use the fields attribute to pass in data that will replace
* API message tags contained in the body of the SMS message.
* Be sure to replace the placeholder text below with real values.
*/

1,
'features' => SOAP_SINGLE_ELEMENT_ARRAYS));
setlocale(LC_ALL, 'en_US');

try {
    $token = "ADD YOUR API TOKEN HERE";
    print "logging in\n";
    $sessionId = $client->login(array('apiToken' => $token))->return;
    $session_header = new SoapHeader("http://api.bronto.com/v4",
'sessionHeader',
array('sessionId' => $sessionId));
    $client->__setSoapHeaders(array($session_header));

    // Make delivery start timestamp
    $now = date('c');
    // Used to replace API message tags in your SMS message with the
    // value you pass in for 'content'.
    $smsMessageFieldObject = array('name' => 'SOME API MESSAGE TAG NAME',
'content' => 'SOME EXAMPLE CONTENT');

    $delivery = array('start' => $now,
'messageId' => 'ADD SMS MESSAGE ID HERE',
'deliveryType' => 'triggered',
'keywords' => 'ADD KEYWORD ID HERE',
'fields' => $smsMessageFieldObject);

    $write_result = $client->addSMSDeliveries(array($delivery))->return;
    if ($write_result->errors) {
        print "There was a problem adding the SMS delivery:\n";
        print_r($write_result->results);
    } else {
        print "The SMS delivery has been successfully created.\n";
    }
} catch (Exception $e) {
    print "uncaught exception\n";
    print_r($e);
}

Related Topics

addSMSDeliveries

Product Tags

If you've imported product data into Bronto, you can use product tags to dynamically add any product field, including custom fields, to an email or SMS/MMS message.

For more information about importing product data, see Products.

A product tag has the syntax %%%product.placeholder.field%%:
• The tag begins and ends with two percent signs
• A dollar sign follows the first set of percent signs
• The tag text starts with product.
• A placeholder value follows product. The placeholder can either be a contact field or an API message field that represents a product's SKU, or any combination of numbers and letters (but not contain spaces or special characters). If you use a contact or API message field, the product data related to that SKU (Product ID) in the product catalog is automatically pulled in for the product tag. If you use an arbitrary placeholder, you will need to map the placeholder to a Product ID.
• Tag text ends with a product field. This field must match the exact name of a product field name and it is case sensitive.

For example, the tag %%%product.(contactSKU).description%%% pulls the description for the product in the product catalog that has a Product ID that matches the contact field you provided. The same is true for the tag %%%product.(#apiSKU).description%%%. But the tag %%%product.lsshirt1.description%%% uses an arbitrary placeholder so you need to map the placeholder lsshirt1 to a product ID so that it pulls the description for the product you mapped to the placeholder lsshirt1 at the time the message is sent.

The correct syntax for using
• A contact field is %%%product.(contactfield).description%%% where the contact field is offset by parenthesis.
• An API message field is %%%product.(#apifield).description%%% where the API message field is offset by parenthesis and begins with a #.

Typically you will add a block of product tags, all with the same placeholder, in order to include several details about a product in your message. When you use the email message editor, you can select a product tag from the Insert list. For more information about how this works see Add Tags Using The Message Editor on page 67 or watch this video. But you also have the option of using the syntax described above to hard code your products into email or SMS/MMS messages.

If you include a product tag in a message that isn't a contact or API message field, you need to map the product placeholder to a product ID in order for the message to replace the tag with real product data. You can click Set Product Defaults, to map product placeholders while working on a message or can map product placeholders while scheduling the message. For more information about mapping placeholders when scheduling messages see Map Product Placeholders When You Schedule A Message on page 173 for email and Schedule A Delivery Of An SMS or MMS Message on page 335 for SMS/MMS.

If you use the Order Service, you also have the option of using your product tags with cart tags. For more information about this see Include Product Data In Cart and Order Tags on page 174.

Related Topics
Video: Add Product Data to Emails Using the Email Message Editor

Common Product Tags
There are several product tags that are frequently used in either email or SMS messages.

Product tags allow you to create a placeholder that is used to pull product data into your marketing messages when you send them.

The following is a list of commonly used product tags, but remember any field - including custom fields - can be used in a product tag.

<table>
<thead>
<tr>
<th>Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%%product_placeholder.title%%%</td>
<td>Title of the product. Example: Womens Plaid Skirt</td>
</tr>
<tr>
<td>%%%product_placeholder.description%%%</td>
<td>Description of the product. Example: Red and black plaid cotton skirt</td>
</tr>
</tbody>
</table>
## Tag Syntax

<table>
<thead>
<tr>
<th>Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
</table>
| %%$product.placeholder.product_url%% | URL representing the product page on the merchant's website.  
Example: https://www.mystore.com/ SKT_REDBLK_12345.asp |
| %%$product.placeholder.mobile_url%% | URL representing the mobile product page on the merchant’s website.  
Example: https://m.mystore.com/ SKT_REDBLACK_12345.asp |
| %%$product.placeholder.image_url%% | URL for the main image for the product.  
Example: https://www.mystore.com/images/ SKT_REDBLACK_12345.jpg |
| %%$product.placeholder.availability_date%% | Date a pre-order product will be available.  
Example: 2015-06-01T12:00-0800 |
| %%$product.placeholder.price%% | List price of the product.  
Example: 29.99 USD |
| %%$product.placeholder.sale_price%% | Sale price of the product.  
Example: 23.99 USD |
| %%$product.placeholder.brand%% | Brand of the product.  
Example: BrandX |
| %%$product.placeholder.color%% | Color of the product.  
Example: red/black |
| %%$product.placeholder.size%% | Size of the product.  
Example: M |
| %%$product.placeholder.average_rating%% | Current average rating of the product.  
Example: 4.25 |

If you include a product tag in a message that isn't a contact or API message field, you need to map the product placeholder to a product ID in order for the message to replace the tag with real product data. You can click **Set Product Defaults**, to map product placeholders while working on a message or can map product placeholders while scheduling the message. For more information about mapping placeholders when scheduling messages see **Map Product Placeholders When You Schedule A Message** on page 173 for email and **Schedule A Delivery Of An SMS or MMS Message** on page 335 for SMS/MMS.

### Use Cart and Order Tags inside Product Tags

You can use cart and order tags inside of a product tag, in the place of the product placeholder, to reference other products based on attributes similar to what products are in a contact's cart.

In the product tag, instead of the placeholder, you can use a cart product tag that points to a value that represents a product ID in the catalog.

For example, if you have a product catalog field called "cross_sell" that is storing a product ID of another product in your catalog, you can use **%%$product.($cart.item.product.cross_sell).title%%** to display the title of the cross-sell product to the product in the cart.
The syntax for using a cart tag inside of a product tag is:

```%
%%$product.($cart.item.product.product_field).field%%
```

### Add Product Tags To An Email

You can add product tags to your email in order to send contacts messages that include product data.

Product tags allow you to create a placeholder that is used to pull product data into your marketing messages. When your message is sent, the product tag is replaced with the appropriate product data.

If you are creating a message using the email message editor, you can use the Insert menu to add a product tag to your message. See Add Tags Using The Message Editor on page 67. If you are not using the message editor, or do not want to use the Insert menu, you can manually include your product tags in a message using the steps outlined below.

For more information about the syntax of product tags, see Product Tags on page 170.

To add a product tag to a message:

1. Open your message
2. In the body of your message, add `%%$product.placeholder.field%%`, replacing
   - **placeholder** with a placeholder that you will map to a Product ID. The placeholder can either be a contact field or an API message field that represents a product's SKU, or any combination of numbers and letters (but not contain spaces or special characters). If you use a contact field, the proper syntax is `%%$product.(contactfield).name%%` where the contact field is offset by parenthesis. If you use an API message field the proper syntax is `%%$product. (#apifield).name%%` where the API message field is offset by parenthesis and begins with a #.
   - **field** with a valid product field. Examples of a valid product field include description, image_url, or average_rating.

   So an example of a properly formatted product tag that pulls the brand of a product into your message is `% $product.tanktopA.brand%

3. Add a product tag for each field of the product you want to include in your message.
   - Make sure to use the same placeholder in each product tag for the same product. Placeholders are case sensitive.
4. If you want to include a different product in your message, enter the product tag(s) for that product.
   - Make sure you use a unique placeholder for each product.

When your message is ready, you will need to map the product placeholders to Product IDs if you did not use a contact or API message field for the placeholder. (If you did use a contact or API message field, the placeholders are automatically mapped.) There are three ways placeholders can be mapped:

- You can map placeholders when you schedule a message. For more information see Map Product Placeholders When You Schedule A Message on page 173.
- Messages created with the new message editor can be mapped to a default Product ID using the editor. For more information see Set Product Defaults in the Settings Palette on page 80 topic.
- Messages created with the WYSIWYG editor can be mapped to a default Product ID using the Product Defaults button. For more information see Set Product Tag Placeholder Defaults WYSIWYG Editor on page 116.

### Map Product Placeholders When You Schedule A Message

If you use an arbitrary placeholder in a product tag, you need to map the placeholder to a Product ID. You map placeholders when you schedule a regular, test, or A/B split message.

After you map the placeholders in product tags, the product tag is replaced with the product data that matches the field defined in the tag when the message is sent. This task explains how to map the placeholder when you schedule a regular, test, or A/B Split delivery of the message. The mapping is not stored for future deliveries. Instead, you will need to map the placeholder for each message delivery you use product data in.

> **Note:** If your product placeholder is a contact or API message field, you do not need to map the placeholder.
If you wish to map default placeholders that will be saved, see Set Product Defaults in the message editor or Set Product Tag Placeholder Defaults WYSIWYG Editor on page 116.

To map product placeholders used in product tags when you schedule a message:

1. When scheduling a message, click Show Advanced Options and scroll down to the Set Delivery Specific Products section.
2. Optional: If you are scheduling an A/B split message, select the split group you want to map from the drop-down.
3. Enter the Product ID for the product you want to use in the Delivery Specific Product ID box.
   Make sure the Product ID you enter is an exact match for one of your Product IDs. Product IDs are case sensitive.
4. Repeat step 3 until you have mapped all of the product placeholders in the message to Product IDs.
   Each placeholder only needs to be mapped once per message delivery.
5. Optional: If you are scheduling an A/B split message, select the next split group you want to map from the drop-down and repeat step 3 until you have mapped all of the product placeholders in the message to Product IDs.
   If you are splitting on message content, the name of each message is included in the drop-down list.
6. Finish the rest of the steps you need to complete in order to schedule your message.
   When the message is sent, your product tags will be replaced by product data.

**Cart and Order Tags**
Cart and order tags allow you to dynamically add shopping cart or order data to your messages.

**Important:** This topic only applies to you if you pass either cart or order data from your site into Bronto.

After Bronto has captured cart and/or order data from your site, you can use that data in emails to send targeted messages to your contacts. You have the options of:

- Including data about the shopping cart itself. This includes things like the shipping date or any discounts associated with the cart. See Add Cart and Order Data To A Message on page 175.
- Including data about items contained within the cart. This includes things like an image associated with an item or a product's URL. See Cart Loop Tags on page 176.
- Including additional product data about a cart item by associating product data with a cart item. In order to do this, you must have imported product data into Bronto. See Include Product Data In Cart and Order Tags on page 174.

When creating a new message you can Add Tags Using The Message Editor on page 67 and Add Cart/Order Loops Using The Message Editor on page 69. If you're updating an old message using the WYSIWYG editor, you can add the tag by typing the tag syntax directly into the message in the WYSIWYG editor.

You must use a workflow that is triggered by the Cart Is Abandoned, the Order Is Added, or the Order Is Shipped node in order to successfully send a message that contains cart and order tags. These workflows allow Bronto to identify the appropriate cart/order data for a contact in order to replace the tag with real content targeted to the contact.

**Related Topics**
Workflow Trigger Nodes on page 356
Triggers nodes represent events that occur in your account which kickoff (or start) a workflow.

**Include Product Data In Cart and Order Tags**
When you use the Order Service and have imported product data, you can use a combination of product and cart data in your messages.

**Important:** This topic only applies to you if you pass either cart or order data from your site into Bronto.

If you use the Cart Recovery app, you can use cart tags to pull product data from shopping carts and orders into your messages. However, shopping carts contain a limited set of data about a product. So, when you have also imported product data into Bronto, you can use a combination of cart tags and product tags to pull additional information about cart and order items into your email messages. For more information about importing product data into Bronto, see Products.
In order to use a product tag with a cart tag, the SKU number for the cart item must match an imported product data's Product ID field.

Product tags can be used in both normal cart tags and in `{cart_loop}` tags within your message or in the subject line. For more information about cart tags, see Add Cart and Order Data To A Message on page 175. For more information about cart loop tags, see Cart Loop Tags on page 176.

To include a product tag, add `.product.field` after the cart tag. For example, the syntax to pull in a product title for a cart item is

- Outside of a cart loop: `%%$cart.item_3.product.title%%`
- Inside of a cart loop: `%%$cart.item.product.title%%`

Note: Cart and order tags can only be used in messages sent via a workflow that is triggered by the Cart Is Abandoned, the Order Is Added, or the Order Is Shipped nodes.

Note: Cart tags are populated with data captured from your site according to selectors you define on the Cart View page. For information see Add Cart Views For Shopping Cart Abandonment on page 1148.

Related Topics

Advanced Styling For Browse Recovery Messages on page 1475

You can use product tags and dynamic code in different ways to style your Browse Recovery messages.

Use Dynamic Content within Cart and Order Loops

You can use dynamic content to change the displayed content of each cart or ordered item based on a product field value for that item.

Inside of a cart/order loop, you can use an IF statement based on a `cart.item.product` tag to decide what content to display from the product catalog.

For example, you can trigger an Order is Added workflow that checks a comparison node in the workflow to see if at least one item is in stock. If so, the workflow sends an email to the contact. In that message, you only want to show products that are in stock (the product's availability field equals "In Stock"). Inside the cart loop, you need to have dynamic content so you can check the value of that field to see if it is set to "In Stock." If it is in stock, you display the product. If it is not, then nothing is displayed for that iteration of the loop.

The syntax to use an IF statement looks like this:

```
{if "%%$cart.item.product.attribute%%" eq ""
```

Note: Cart and order tags can only be used in messages sent via a workflow that is triggered by the Cart Is Abandoned, the Order Is Added, or the Order Is Shipped nodes.

Add Cart and Order Data To A Message

Data about carts and orders can be added to the body of your messages using the tags outlined below:

Note: Cart and order tags can only be used in messages sent via a workflow that is triggered by the Cart Is Abandoned, the Order Is Added, or the Order Is Shipped nodes.

<table>
<thead>
<tr>
<th>Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>%%$cart.id%%</code></td>
<td>Bronto's unique ID for either the shopping cart (if it was abandoned) or the order (if the contents of the cart resulted in an order).</td>
</tr>
<tr>
<td><code>%%$cart.cartID%%</code></td>
<td>In messages, this can be used to include the unique Bronto ID for an order if the cart resulted in an order. This is only how cartID works in messages; it is not how cartID works in Bronto's Orders API.</td>
</tr>
<tr>
<td><code>%%$cart.externalid%%</code></td>
<td>ID for the cart that is passed into Bronto from your site.</td>
</tr>
<tr>
<td><code>%%$cart.createdate%%</code></td>
<td>Date the shopping cart was created.</td>
</tr>
<tr>
<td>Tag Syntax</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>%%$cart.updateddate%%</td>
<td>Last date the shopping cart was updated.</td>
</tr>
<tr>
<td>%%$cart.status%%</td>
<td>Status of the shopping cart. Cart status types are:</td>
</tr>
<tr>
<td></td>
<td>• <em>Active</em> - The shopping cart is currently shopping / checking out.</td>
</tr>
<tr>
<td></td>
<td>• <em>Abandoned</em> - The shopping cart is abandoned.</td>
</tr>
<tr>
<td></td>
<td>• <em>Complete</em> - The shopping cart has been converted to an order.</td>
</tr>
<tr>
<td>%%$cart.tax%%</td>
<td>Total tax amount associated with the shopping cart.</td>
</tr>
<tr>
<td>%%$cart.discount%%</td>
<td>Total discount associated with the shopping cart.</td>
</tr>
<tr>
<td>%%$cart.subtotal%%</td>
<td>Subtotal associated with the shopping cart.</td>
</tr>
<tr>
<td>%%$cart.total%%</td>
<td>Total associated with the shopping cart.</td>
</tr>
<tr>
<td>%%$cart.currency%%</td>
<td>Currency type; for example, USD (United States Dollar).</td>
</tr>
<tr>
<td>%%$cart.shippingdate%%</td>
<td>The shipping date associated with the shopping cart.</td>
</tr>
<tr>
<td>%%$cart.shippingdetails%%</td>
<td>Shipping details associated with the shopping cart</td>
</tr>
<tr>
<td>%%$cart.shippingamount%%</td>
<td>Total shipping amount associated with the shopping cart.</td>
</tr>
<tr>
<td>%%$cart.url%%</td>
<td>URL that can be used to link to a view of the shopping cart.</td>
</tr>
<tr>
<td>%%$cart.trackingurl%%</td>
<td>Shipping tracking URL associated with the cart.</td>
</tr>
</tbody>
</table>

**Note:** Cart tags are populated with data captured from your site according to selectors you define on the Cart View page. For information see Add Cart Views For Shopping Cart Abandonment on page 1148.

**Related Topics**

- **Workflow Trigger Nodes** on page 356
  Triggers nodes represent events that occur in your account which kickoff (or start) a workflow.

- **Add Cart Views For Shopping Cart Abandonment** on page 1148
  You need to add cart views to manage cart selectors for your site.

**Cart Loop Tags**
The cart loop tags allow Bronto to read through the array of line items associated with a shopping cart or an order and dynamically insert that data into an email message.

**Important:** This topic only applies to you if you pass either cart or order data from your site into Bronto.

Cart loop tags begin with `{cart_loop}`, contain a list of cart/order line item tags, and ends with `{/cart_loop}`. When a cart loop is included in a message, Bronto will look at the line items in an abandoned cart and include the data that matches each tag for every line item in the cart. So if your cart loop is:

```
{dynamic_code}
{cart_loop limit=5}
  %$cart.item.name%
  %$cart.item.description%
  %$cart.item.image%
{/cart_loop}
{/dynamic_code}
```

and a contact has 3 abandoned items in a cart, then the name, description and image for those 3 items will be included in the message.
You have the option of including a limit to the number of items that will be included in the loop. In the example above, the limit is set at 5. If there were more than 5 items in the cart, only the first 5 will be included in the message. When you do not specify a limit, all of the items in a cart are included in the message.

If you include a cart loop tag in an HTML message, you must wrap the cart loop in a dynamic code tag. If you're using the email message editor, there is a cart loop tag element you can add to the canvas.

The message can be sent via a workflow using the **Cart Is Abandoned** trigger node.

Note: Cart and order tags can only be used in messages sent via a workflow that is triggered by the **Cart Is Abandoned**, the **Order Is Added**, or the **Order Is Shipped** nodes.

Inside of the `{cart_loop}` tag, the line item data can be accessed using the following tags:

<table>
<thead>
<tr>
<th>Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>%%$cart.item.sku%%</code></td>
<td>SKU associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.category%%</code></td>
<td>Category associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.createdate%%</code></td>
<td>Date the item was added to the cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.currency%%</code></td>
<td>Currency associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.description%%</code></td>
<td>Description associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.imageurl%%</code></td>
<td>URL pointing to an image associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.name%%</code></td>
<td>Name associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.other%%</code></td>
<td>Additional data associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.position%%</code></td>
<td>Position associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.unitprice%%</code></td>
<td>Unit price associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.saleprice%%</code></td>
<td>Sale price associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.quantity%%</code></td>
<td>Number of units associated with a specific item in the shopping cart.</td>
</tr>
<tr>
<td><code>%%$cart.item.totalprice%%</code></td>
<td>Total price associated with a specific item in the shopping cart.</td>
</tr>
</tbody>
</table>
Create And Design

<table>
<thead>
<tr>
<th>Tag Syntax</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%$cart.item.producturl%</td>
<td>URL pointing to the product associated with a specific item in the shopping cart.</td>
</tr>
</tbody>
</table>

**Note:** The Shopify Connector currently does not import the product URLs or image URLs from cart events into Bronto, but can import these from your product feed. If your product catalog is up-to-date in Bronto, you can pull product URLs or image URLs from the catalog in order to use them in Cart Recovery messages. For more information see Include Product Data In Cart and Order Tags on page 174.

To use the `{cart_loop}` tag:

1. Go to Messages > Messages.
2. Create a new message or edit an existing message.
3. Add `{dynamic_code}{cart_loop}{/cart_loop}{/dynamic_code}` tags to the body of the email message as shown below:

```html
<table border="1">
  <tbody>
    <tr>
      <th>Cart Item Name</th>
      <th>Cart Item Category</th>
      <th>Cart Item Description</th>
      <th>Cart Item Other</th>
      <th>Cart Item SKU</th>
      <th>Cart Item Unit Price</th>
      <th>Cart Item Sale Price</th>
      <th>Cart Item Quantity</th>
      <th>Cart Item URL</th>
      <th>Cart Item Image</th>
    </tr>
    {cart_loop}
    <tr>
      <td>%%$cart.item.name%%</td>
      <td>%%$cart.item.category%%</td>
      <td>%%$cart.item.description%%</td>
      <td>%%$cart.item.other%%</td>
      <td>%%$cart.item.sku%%</td>
      <td>%%$cart.item.unitprice%%</td>
      <td>%%$cart.item.saleprice%%</td>
      <td>%%$cart.item.quantity%%</td>
      <td>%%$cart.item.producturl%%</td>
      <td><img src="%%$cart.item.imageurl%%" border="0" style="display:block;" /></td>
    </tr>
    {/cart_loop}
  </tbody>
</table>
```
Tip: In the example above, notice how the \{dynamic_code\}{cart_loop}\{/cart_loop\}\{/dynamic_code\} tags have been placed inside of an HTML table. This was done so the content brought in via the \{dynamic_code\}{cart_loop}\{/cart_loop\}\{/dynamic_code\} tags will display nicely in a table. It is perfectly ok to do this, but you will need to TURN OFF the WYSIWYG editor (as is the case above) when working with dynamic code and HTML. The WYSIWYG editor attempts to correct what it sees as mistakes in HTML and will thus produce unintended results if it encounters dynamic code embedded in HTML. To turn off the WYSIWYG editor, click WYSIWYG Editor Off next to the Subject Line text box.

Tip: The above example is very basic and would produce something similar to the following when the message is sent:

4. Click Create New Workflow to create a new workflow, or click on the name of an existing that is triggered by the Cart Is Abandoned workflow trigger node.
5. If you are creating a new workflow, add the Cart Is Abandoned trigger node to the workflow canvas.
6. Drag the Send Email node on to the workflow canvas.
7. Click the following text in the Send Email action node: marketing.
8. From the pull-down menu choose either marketing or transactional.
9. Click the following text in the Send Email action node: an email message.
10. Select the message you added the \{cart_loop\} tag to.
11. Click Save And Close.
12. Click the toggle in the **Status** column to enable the workflow you just created.

**Note:** Cart tags are populated with data captured from your site according to selectors you define on the **Cart View** page. For information see Add Cart Views For Shopping Cart Abandonment on page 1148.

For more information on creating workflows, see Workflows on page 346.

**Tip:** A workflow can be filtered based on the status of a contact's cart using the **Cart Status** filter node. For more information on using the **Cart Status** filter node, see Use The Cart Status Filter Node In Workflows on page 379 in help

**Related Topics**

**Workflows** on page 346

Workflows allow you to automate steps of a multi-channel marketing life-cycle by specifying combinations of triggers, filters, and actions that determine how to handle contact data and what marketing communications to send.

**Add If-Empty Tags**

Often times you don't have data for everyone in your list. In this case, you should make use of If-Empty tags. Here we will walk through a common use of it, the opening salutation.

```
Dear %if(%%firstname%% is empty,"Customer",%%firstname%%)%
```

This works by checking the first tag indicated (above we are checking `%%firstname%%`) to see if it is empty. If it is empty, then the value in quotes after “is empty,” is shown (in the example above that would be “Customer”). If your first tag is not empty, then the second value is shown (`%%firstname%%`).

In this case, the function would display “Dear Customer,” when the tag `firstname` is blank and “Dear % %firstname%%,” when it's not.

**Note:** If-Empty tags represent a legacy feature, and while we will continue to support their functionality, we recommend that you switch to using dynamic content to handle instances of empty tags.

**Dynamic Content**

Dynamic content is an advanced feature that allows you add content to a message using conditional logic.

With dynamic content you can design versions of an email within a single message by flagging blocks of content to only be sent to contacts who meet the conditions you specify. For example, you could add a discount to a message that only contacts on a certain segment will see. Or include different discount levels for different segments.

Dynamic content can be added either by using the dynamic content menus provided in the message editor, WYSIWYG editor, or HTML editor or can be coded into your message using dynamic code.

**Related Topics**

**Video: Make Content Dynamic With the Email Message Editor**

**Add Dynamic Content To Emails In The Email Message Editor**

You can make containers in the email message editor dynamic.

With dynamic content you can design versions of an email within a single message by flagging blocks of content to only be sent to contacts who meet the conditions you specify.

1. Follow the steps to create an email in the Email Message Editor.
2. Mouse over the container.
3. Click **Dynamic**.
The **Edit Dynamic Content Rules** panel opens.

4. In the **Edit Dynamic Content Rules** panel, set up your rule criteria:

   In the **if** list:
   - **Field** to use a contact field
   - **RFM Metric** to use an RFM metric
   - **On List** to use list membership
   - **On Segment** to use segment membership
   - **On SMS Keyword** to use an SMS keyword subscription

   a) Then click + and select the item you want to use.

   For example, if you selected **On Segment**, use + to select your segment.

5. Optional: Click + **AND** to add additional conditions for your rule.

   If you add additional conditions, follow the directions in step 4 to set up the criteria.

6. Optional: When you are done with the first rule, click **New Rule** to add another rule.

   By default, the content in the message for the first rule is copied into the other rules as you create them. You can edit or delete this content as appropriate.

7. Set up your new rule and any subsequent rules you would like the container to have.

   When you add dynamic content, an **All Others** rule is automatically defined. Any contacts who do not fit into any of the dynamic content criteria you set are sent the version of the container that is associated with the all other rule. Make sure that you appropriately configure the container content for this default rule as well as the rules you defined.

8. Click **Done**.

9. Select the rule you would like to work with from the **Active Dynamic Rule** list to the right of the container.

10. Edit the content in the container for this rule, then design it.

    When you are done, the container should match what contacts who fit the rule should see when they open the message. You can see other what other rules look like, or quickly access the **Edit Dynamic Content Rules** panel, using the container's dynamic content shortcut on the message canvas.
To see the dynamic content for another rule in the container, change the value in the Active Dynamic Rule list.

To edit the rule, click the lightning bolt to the right of the container. The Edit Dynamic Content Rules panel will open and you can make your changes.

**Dynamic Code HTML and WYSIWYG**

**Add Dynamic Content To The Body, Header, And Footer Of HTML And Text Email**

Dynamic content is an advanced feature that allows you to add content to messages based on whether or not certain conditions are met.

1. Click the **Insert Dynamic Content** button in the WYSIWYG editor, or the Dynamic Content button if you are viewing the Text version of an email message.
2. Choose the conditional.
   - By default, for the first block, you can only choose `if`.
3. Choose the operator. The available operators are:
   - In List
   - In Segment

**Note:** Dynamic Code can be used in URLs, however, the URLs (links) will not be tracked. You will not be able to view click level metrics for links containing Dynamic Code.
• On SMS Keyword
• Field Is Blank
• Field Is Equal To
• Field Is Not Equal To
• Field Is Greater Than
• Field Is Less Than
• Field Is Checked
• Field Is Not Checked

Note: The Field Is Checked and Field Is Not Checked operators can only be used with fields created with a type of checkbox.

4. Choose a value. The values that you can choose from depend on the operator you choose in the previous step.

Note: The value you enter when using one of the field operators is case sensitive.

a) Click OR to add an additional value.

5. Add the content that will be displayed if the dynamic content conditions are met.

6. Optional: You can use the Insert Field Tags and Insert Special Tags pull-down menus to add Field Tags and Special Tags to the content area.

Tip: For more information on using Field Tags and Special Tags, see Message Tags on page 149.

7. Optional: Click Logic to add nested conditionals to a dynamic content block. You can add 2 nested conditionals per dynamic content block. Click Add Block to add additional dynamic content blocks.

Tip: For more information on adding nested conditionals and additional dynamic content blocks, see Add Nested Conditionals on page 188 and Edit Dynamic Content Blocks Using The Dynamic Content Editor on page 188.

8. Click either

• Insert Raw Dynamic Code - Clicking Insert Raw Dynamic Code will add a dynamic content block to your message that contains raw dynamic code. If you want to make changes to this dynamic content block, you will have to edit the dynamic code directly.

Tip: For more information on editing dynamic code, see Dynamic Code on page 190.

• Insert Re-Editable Dynamic Content (HTML Version Only) - Clicking Insert Re-Editable Dynamic Content will add an image to your email message that acts as a visual representation of a Dynamic Content Block. If you click on this image and then click the Insert Dynamic Content button on the WYSIWYG editor, the Dynamic Content Editor will open up and you will be able to make changes to the dynamic content block using the Dynamic Content Editor. The image will be replaced with the appropriate
content when the email message is actually sent, or when you choose to dynamically preview the email message.

Related Topics

Message Tags on page 149

There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

Add Dynamic Content To Subject Lines For HTML Email

For HTML email messages (this includes web page message types), you can add dynamic content to the subject line of the email message.

To add dynamic content to the subject line of an HTML email message:

1. Choose to create a new or edit an existing HTML email message. This takes you to the Edit Message page.
2. Click Make Subject Dynamic.
3. Choose the conditional.
   By default, for the first block, you can only choose if.
4. Choose the operator. The available operators are:
   • In List
   • In Segment
   • On SMS Keyword
   • Field Is Blank
   • Field Is Equal To
   • Field Is Not Equal To
   • Field Is Greater Than
   • Field Is Less Than
   • Field Is Checked
   • Field Is Not Checked

   Note: The Field Is Checked and Field Is Not Checked operators can only be used with fields created with a type of checkbox.
5. Choose a value.
   The values that you can choose from depend on the operator you choose in the previous step.
   Note: The value you enter when using one of the field operators is case sensitive.
   a) Click OR to add an additional value.
6. Add the content that will be displayed if the dynamic content conditions are met.
7. Optional: You can use the Insert Field Tags and Insert Special Tags pull-down menus to add Field Tags and Special Tags to the content area.
Tip: For more information on using Field Tags and Special Tags, see Message Tags on page 149.

8. Optional: Click **Logic** to add nested conditionals to a dynamic content block.

   You can add 2 nested conditionals per dynamic content block. Click **Add Block** to add additional dynamic content blocks.

   Tip: For more information on adding nested conditionals and additional dynamic content blocks, see Add Nested Conditionals on page 188 and Edit Dynamic Content Blocks Using The Dynamic Content Editor on page 188.

9. Click **Insert Dynamic Subject**.

10. Optional: If you have already added dynamic content to your subject line, you can click the Revert to a static subject checkbox to replace the existing dynamic content with the static content you type in the text box.

    a) Add the static subject in the text box.

    b) Click **Insert Static Subject**

Related Topics
Message Tags on page 149
There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

Add Dynamic Content To The Subject Line Of Plain Text Email

Although you can't directly add dynamic content to the subject line of a plain text email message, there is a workaround you can use to sync the dynamic content from the subject line of an HTML email message, over to the subject line of the plain text version of an email message.

Tip: You can directly add dynamic code to the subject line of a plain text email message. For more information on dynamic code, see Dynamic Code on page 190.
To sync dynamic content to the subject line of a plain text email message:

1. Choose to create a new or edit an existing HTML email message. This will take you to the Edit Message page.

2. Click **Make Subject Dynamic**.

3. Choose the conditional.
   By default, for the first block, you can only choose `if`.

4. Choose the operator. The available operators are:
   - In List
   - In Segment
   - On SMS Keyword
   - Field Is Blank
   - Field Is Equal To
   - Field Is Not Equal To
   - Field Is Greater Than
   - Field Is Less Than
   - Field Is Checked
   - Field Is Not Checked

   **Note:** The **Field Is Checked** and **Field Is Not Checked** operators can only be used with fields created with a type of **checkbox**.

5. Choose a value.
   The values that you can choose from depend on the operator you choose in the previous step.

   **Note:** The value you enter when using one of the field operators is case sensitive.

   a) Click **OR** to add an additional value.

6. Add the content that will be displayed if the dynamic content conditions are met.

7. Optional: You can use the **Insert Field Tags** and **Insert Special Tags** pull-down menus to add Field Tags and Special Tags to the content area.

   ![Edit Dynamic Content](image)

   **Tip:** For more information on using Field Tags and Special Tags, see **Message Tags** on page 149.

8. Optional: Click **Logic** to add nested conditionals to a dynamic content block.
   You can add 2 nested conditionals per dynamic content block. Click **Add Block** to add additional dynamic content blocks.

   **Tip:** For more information on adding nested conditionals and additional dynamic content blocks, see **Add Nested Conditionals** on page 188 and **Edit Dynamic Content Blocks Using The Dynamic Content Editor** on page 188.

9. Click **Insert Dynamic Subject**.
10. Make sure the **Sync HTML and Text Subjects** checkbox is checked.

11. Click the **Text Version** tab.

12. Click **Re-generate from HTML version**.

You will see the dynamic code that represents the Dynamic Content you added in the subject line of the HTML version of your message now displayed in the subject line of the plain text version of the email message.

**Related Topics**

- **Message Tags** on page 149

There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

**Add Additional Dynamic Content Blocks**

If you want to add additional dynamic content blocks, click **Add Block**. For the added content block, you can choose *otherwise, if, or all others*. The *otherwise, if* option lets you add additional content based on conditions other than the one defined in the first dynamic content block. For example, let's say you own a retail store and you want to send an email announcing your fall sale. You have regular content that you want most of the people on your list to receive, but you want to provide special content for your new customers and for your high value customers. Assuming your new customers are on the **Recent Purchasers** list, and your high value customers are on the **500K** list, you could build your dynamic content as shown below.

In the example above, if a contact receiving the email message was not on the **Recent Purchasers** or **500K** lists, then they would not receive any of the dynamic content. If you wanted to add additional logic to provide dynamic content for everyone else receiving the email message, you could use the **all others** conditional. The **all others** conditional acts as a sort of default option that is applied if the **if** and **otherwise, if** conditionals are not met.
Add Nested Conditionals

Nested conditionals allow you to further refine a dynamic content block by adding additional logic to it. Using the example above, if for some reason you wanted the first dynamic content block to only be seen by contacts on the Recent Purchasers list, who also are from North Carolina, you could do the following:

Edit Dynamic Content Blocks Using The Dynamic Content Editor

In order to edit blocks of dynamic content using the Dynamic Content Editor, you needed to have chosen Insert Re-Editable Dynamic Content when adding dynamic content to the HTML version of an email message. You cannot edit dynamic content blocks using the Dynamic Content Editor in the plain text version of an email message.
To edit a dynamic content block:

1. Click on the edit dynamic content block image.
   The image will be highlighted and the Insert Dynamic Content button on the WYSIWYG editor will also be highlighted.
2. Click the Insert Dynamic Content button on the WYSIWYG editor.
   The Dynamic Content Editor will appear.

3. Make any changes you wish to make.
4. Click either
   - Insert Raw Dynamic Code - Clicking Insert Raw Dynamic Code will add a dynamic content block to your message that contains raw dynamic code. If you want to make changes to this dynamic content block, you will have to edit the dynamic code directly.
     Tip: For more information on editing dynamic code, see Dynamic Code on page 190.
   - Insert Re-Editable Dynamic Content (HTML Version Only) - Clicking Insert Re-Editable Dynamic Content will add an image to your email message that acts as a visual representation of a Dynamic Content Block. If you click on this image and then click the Insert Dynamic Content button on the WYSIWYG editor, the Dynamic Content Editor will open up and you will be able to make changes to the dynamic content block using the Dynamic Content Editor. The image will be replaced with the appropriate content when the email message is actually sent, or when you choose to dynamically preview the email message.

Add Dynamic Content To SMS or MMS Messages

When creating SMS messages, you can add dynamic content to the body of the SMS message. You can also use dynamic content in the Media URL to use dynamic content to include multimedia content in your message.

Tip: Dynamic content is an advanced feature that allows you to add content to messages based on whether or not certain conditions are met.
To add dynamic content to the body of an SMS message:

1. Choose to create a new or edit an existing SMS message. This will take you to the Edit Message page.
   For more information on creating SMS messages, see Create An SMS or MMS Message on page 253.

2. Click Dynamic Content.

3. Choose the conditional. By default, for the first block, you can only choose if.

4. Choose the operator. The available operators are:
   - In List
   - In Segment
   - On SMS Keyword
   - Field Is Blank
   - Field Is Equal To
   - Field Is Not Equal To
   - Field Is Greater Than
   - Field Is Less Than
   - Field Is Checked
   - Field Is Not Checked

   **Note:** The Field Is Checked and Field Is Not Checked operators can only be used with fields created with a type of checkbox.

5. Choose a value. The values that you can choose from depend on the operator you choose in the previous step.
   **Note:** The value you enter when using one of the field operators is case sensitive.

   a) Click OR to add an additional value.

6. Add the content that will be displayed if the dynamic content conditions are met.

7. Optional: Click Logic to add nested conditionals to a dynamic content block.
   You can add 2 nested conditionals per dynamic content block. Click Add Block to add additional dynamic content blocks.
   **Tip:** For more information on adding nested conditionals and additional dynamic content blocks, see Add Nested Conditionals on page 188 and Edit Dynamic Content Blocks Using The Dynamic Content Editor on page 188.

   This adds a dynamic content block to your message that contains raw dynamic code. If you want to make changes to this dynamic content block, you will have to edit the dynamic code directly.

**Dynamic Code**
Dynamic Code is the language behind Dynamic Content. The code that is added to messages when you add Dynamic Content via the Dynamic Content Wizard is an example of Dynamic Code. You can add Dynamic Code directly to the content of SMS messages and HTML email messages. Dynamic Code allows you to have more control over the behavior of Dynamic Content.

To begin creating Dynamic Code, you must first add `{dynamic_code}{/dynamic_code}` tags to an HTML/Text email message or SMS message. All Dynamic Code must be contained within the `{dynamic_code}{/dynamic_code}` tags. You can think of the `{dynamic_code}{/dynamic_code}` tag as the parent of which all other dynamic code will be a child of (i.e. all of your dynamic code).

Dynamic Code is a scripting language similar to JavaScript. It is an advanced feature that should only be used by people familiar with writing code and coding concepts. Knowledge of Dynamic Code IS NOT required to use Dynamic Content.

Note: Dynamic Code can be used in URLs, however, the URLs (links) will not be tracked. You will not be able to view click level metrics for links containing Dynamic Code.

We do not support adding Dynamic Code to content tags. You can, however add content tags to Dynamic Code. For more information on content tags, see Content Tags on page 140.

**Dynamic Code Tags**

The following table provides examples of the valid tags that can be used within dynamic code. Remember, all Dynamic Code must be contained within the `{dynamic_code}{/dynamic_code}` tags.

<table>
<thead>
<tr>
<th>Tag</th>
<th>Dynamic Code Syntax Example</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>if</td>
<td>{if $Contact.firstname eq &quot;Joe&quot;}{/if}.</td>
<td>Type: Conditional Expression</td>
</tr>
<tr>
<td></td>
<td>The <code>{if}</code> conditional is wrapped in curly braces and can be thought of as a tag.</td>
<td>The <code>{if}</code> conditional is wrapped in curly braces and can be thought of as a tag.</td>
</tr>
<tr>
<td></td>
<td>It is the only operator allowed as the first element of a block and can contain additional operators and comparison expressions.</td>
<td></td>
</tr>
<tr>
<td>elseif</td>
<td>{if $Contact.in_list.&quot;Customer List&quot; eq true} {elseif $Contact.in_list.&quot;Client List&quot; eq true} {/if}</td>
<td>Type: Conditional Expression</td>
</tr>
<tr>
<td></td>
<td>The <code>{elseif}</code> conditional is a child of, and will appear within the <code>{if}</code> conditional.</td>
<td>It cannot appear after the <code>{else}</code> conditional. It can contain additional operators and comparison expressions. The <code>{elseif}</code> conditional does not require a closing tag.</td>
</tr>
<tr>
<td></td>
<td>It cannot appear after the <code>{else}</code> conditional.</td>
<td></td>
</tr>
</tbody>
</table>

© Oracle 2018 | 191
<table>
<thead>
<tr>
<th>Tag</th>
<th>Dynamic Code Syntax Example</th>
<th>Notes</th>
</tr>
</thead>
</table>
| else       | {if $Contact.in_list."Customer List" eq true} Joe {else} John {/if}                         | Type: Conditional Expression  
The `{else}` conditional is a child of, and the last tag added within the `{if}` conditional. It does not contain additional operators and comparison expressions. The `{else}` conditional does not require a closing tag. |
| literal    | {literal}...
{lITERAL}...
{/literal}                                           | Literal tags are placed around content that is displayed to your contacts when the Dynamic Code conditions are met. These tags will display the literal content within them, including anything in curly braces that might otherwise be interpreted as Dynamic Code.  
**Note:** If you choose not to use literal tags, then you can add nested logic to your Dynamic Code. In the absence of literal tags, dynamic code (actually anything in curly braces) will be treated as if it is Dynamic Code. Hence, if you try and use curly braces outside of literal tags, and the curly braces are not part of valid Dynamic Code syntax, you will receive an error. |
| loop       | {loop}...
{/loop}                                           | Loop tags are specially formatted API message tags that allow content to be passed in via API Message tags as an array. This an especially useful feature to use with transactional email messages.  
For more information about loop tags see API Loop Tags on page 163. |
| cart loop  | {cart_loop}...
{/cart_loop}                                      | The `{cart_loop}` tag allows you to read through the array of line items associated with a shopping cart or an order, and dynamically insert that data into an email message. The message can then be sent via a workflow using the Cart Is Abandoned trigger node.  
For more information about cart loops see Cart Loop Tags on page 176. |
| API loop   | `{loop}%...%{/loop}`                                   | API loop tags are specially formatted API message tags that allow content to be passed in via API Message tags as an array. This... |
Related Topics

API Loop Tags on page 163
API loop tags allow you to use Bronto's API to add an array of content to a message.

Cart Loop Tags on page 176
The cart loop tags allow Bronto to read through the array of line items associated with a shopping cart or an order and dynamically insert that data into an email message.

Dynamic Code Operators, Variables, and Comparison Expressions
You can use a combination of operators, variables, fields, and comparison expressions with the Bronto-supported dynamic code tags.

There are 10 supported dynamic code operators. A variable must be appended to an operator, separated by a period. The following variables are supported:

- $Contact can be used to target contacts who are part of a specified list, segment, or SMS keyword or used in conjunction with contact fields
- $Message: can be used with field tags, content tags, and special tags
- $cart can be used with cart and order tags
- $lineItems can be used with cart loop tags. When you use this, your dynamic code should be lineItem.fieldname. For example, if you wanted to use cart.item.unitprice in dynamic code, you should write $lineItem.unitprice.
- $product can be used with product fields

The values you enter are case sensitive. For example, if you want to refer to a list called "Example List A", you need to used the exact spelling and case. Using "example List A" will not work as expected.

Comparison expressions allow you to compare an operator and a value. The following expressions are supported:

- eq can be used for equals
- neq can be used for not equal to
- lt can be used for less than
- gt can be used for greater than

<table>
<thead>
<tr>
<th>Operator</th>
<th>Dynamic Code Syntax Example</th>
<th>Notes</th>
</tr>
</thead>
</table>
| In List         | $Contact.in_list."listname" eq true | Can only be used with $Contact
Multiple lists can be added for comparison and must be separated by an OR |
| In Segment      | $Contact.in_segment."segmentname" eq true | Can only be used with $Contact
Multiple segments can be added for comparison and must be separated by an OR |
| On SMS Keyword  | $Contact.on_keyword."55555:keywordname" eq true | Can be used with $Contact
Multiple keywords can be added for comparison and must be separated by an OR |

Note: 55555 should be replaced with the short code that the keyword belongs to.
<table>
<thead>
<tr>
<th>Operator</th>
<th>Dynamic Code Syntax Example</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Is Blank</td>
<td><code>$Contact.fieldname eq &quot;&quot;</code></td>
<td>Can be used with:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $Contact</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $Message</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $cart</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $lineItems</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $product</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Multiple blank fields can be added for comparison and must be separated by an OR.</td>
</tr>
<tr>
<td>Field Is Equal To</td>
<td><code>$product.fieldname eq &quot;value&quot;</code></td>
<td>Can be used with:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $Contact</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $Message</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $cart</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $lineItems</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $product</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can only compare a single field, but you can compare multiple values for that field and the comparison must be separated by an OR. For example:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>{if $Contact.rfm_total_revenue eq &quot;100&quot; OR $Contact.rfm_total_revenue eq &quot;200&quot;}</td>
</tr>
<tr>
<td></td>
<td></td>
<td>{literal}CONTENT HERE{/literal}</td>
</tr>
<tr>
<td></td>
<td></td>
<td>{/if}</td>
</tr>
<tr>
<td>Field Is Not Equal To</td>
<td><code>$lineItem.fieldname neq &quot;value&quot;</code></td>
<td>Can be used with:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $Contact</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $Message</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $cart</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $lineItems</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• $product</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can only compare a single field, but you can compare multiple values for that field and the comparison must be separated by an OR. For example:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>{if $Contact.rfm_total_revenue neq &quot;100&quot; OR $Contact.rfm_total_revenue neq &quot;200&quot;}</td>
</tr>
<tr>
<td></td>
<td></td>
<td>{literal}CONTENT HERE{/literal}</td>
</tr>
<tr>
<td></td>
<td></td>
<td>{/if}</td>
</tr>
<tr>
<td>Operator</td>
<td>Dynamic Code Syntax Example</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Field Is Greater Than          | `$cart.fieldname gt "value"` | Can be used with  
• $Contact  
• $Message  
• $cart  
• $lineItems  
• $product 
You can only compare a single field and value. |
| Field Is Greater Than Or Equal To | `$cart.fieldname gte "value"` | Can be used with  
• $Contact  
• $Message  
• $cart  
• $lineItems  
• $product 
You can only compare a single field and value. |
| Field Is Less Than             | `$Contact.fieldname lt "value"` | Can be used with  
• $Contact  
• $Message  
• $cart  
• $lineItems  
• $product 
You can only compare a single field and value. |
| Field Is Less Than Or Equal To | `$Contact.fieldname lte "value"` | Can be used with  
• $Contact  
• $Message  
• $cart  
• $lineItems  
• $product 
You can only compare a single field and value. |
### Create And Design

<table>
<thead>
<tr>
<th>Operator</th>
<th>Dynamic Code Syntax Example</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Field Is Checked             | $Message.fieldname eq true  | Can be used with  
• $Contact  
• $Message  
• $cart  
• $lineItems  
• $product  
You can only compare a single field and value.  

**Note:** The Field Is Checked and Field Is Not Checked operators can only be used with fields created with a type of **checkbox**. |
| Field Is Not Checked         | $Contact.fieldname neq true | Can be used with  
• $Contact  
• $Message  
• $cart  
• $lineItems  
• $product  
You can only compare a single field and value.  

**Note:** The Field Is Checked and Field Is Not Checked operators can only be used with fields created with a type of **checkbox**. |

### Email Best Practices

We've provided several topics related to best practices for email in order to help you achieve better marketing campaign success.

There are a lot of factors that contribute to creating and sending effective and efficient email messages. To help ensure that you don't miss something, we've put together some guidelines for best practices you should follow.

### Whitelisting Email Addresses

Whitelisting helps your messages to avoid the spam or junk folder.

Whitelisting email addresses and adding email addresses to a safe senders list (in an email client or in internet security software) allows for email from those addresses to arrive safely into an Inbox without being placed in the junk or spam folder. You can pass this information on to your contacts so that they can whitelist you and ensure they receive email messages from you.

For more information about how to set up whitelisting for an email client or a particular internet security software, see the documentation for that product.

### Email Bounce

An email bounce is an automated message about a delivery failure.
An email bounce, or failed DSN (Delivery Status Notification), is an automated electronic message from a mail system informing the sender about a delivery problem with their (the sender's) original email message. So in the context of the application, if you send an email message and the delivery fails, our mail server will receive a bounce message explaining why the email message bounced.

Note: Email bounces, or bounces, are email-centric.

Now you may be thinking "Great, if I send an email message and the delivery fails, I get a bounce message back telling me what's wrong and how to fix the problem! In an ideal world, this would be true. Unfortunately, unless you are very well versed in bounce message status codes, chances are you are not going to be able to take away a whole lot from the bounce message.

So what's an email marketer to do? Your best option for understanding and correcting email bounces is to gain a basic understanding of how ISPs (Internet Service Providers) classify bounces, learn what error message codes mean at a basic level, and finally, how the application simplifies the process of handling email bounces.

ISP Bounce Classification

When an email bounce occurs, ISPs generally classify the bounce as being Hard or Soft. The main difference between the two is that a soft bounce may be resolved if resent again after a delay, whereas a hard bounce will most likely not succeed if resent. Technically, soft bounces are referred to as "Persistent Transient Failures", while hard bounces are referred to as "Permanent Failures". If you want to get to a higher level of technical detail, messages returned with a message status code of 5.xxx.xxx are hard bounces, while those with a 4.xxx.xxx code are soft bounces. The "x"s represent numbers which further specify the nature of the bounce and often vary widely based on a specific ISP's classification system. For the purpose of understanding email bounces within the application, you only need to know the first number in a message code.

So to bring it all home, message status codes beginning with a 4 represent a soft bounce, or "Persistent Transient Failure". Message status codes beginning with a 5 represent a hard bounce, or "Permanent Failure".

Email Bounces with Bronto

We have developed a system for handling and displaying email bounces that makes it much more manageable for our users. The first step in making this process easy for you is handling and interpreting the bounce messages. We take all the data contained in a bounce message and interpret it for you. So unless you generate a detailed tracking report, you will never actually see a bounce message code. What you need to know for sure is how we classify bounces.

At the highest level, we use the classification system of hard bounce and soft bounce in the same way ISPs do. Additionally, we have added a category for those bounces that are neither hard nor soft called Other. The Other category contains email bounces that are unclassified. We try our best to keep email bounces out of this category and apply a proper label to them.

From here, we further breakdown email bounces into three types of soft bounces and three types of hard bounces. The three types of soft bounces are Temporary Contact Issue, Destination Temporarily Unreachable, and Deferred Message Content. The three types of hard bounces are Bad Email Address, Destination Unreachable, and Rejected Message Content. Each email bounce type is described in detail below:

- **Bad Email Address** - The bad email address bounce type means that the email server in question has indicated that this is not a valid account. Whether the contact has left that host, had a typo in their registration, or simply made up the email address cannot be discerned from this message. The bad email address metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of bad email address bounces, you need to review your contact gathering mechanisms. Are you forcing people to provide an email address? Contacts may just be making something up to get through the form. Or, perhaps the demographic you are appealing to is more likely to not want to give out their real email address. If so, you may want to tempt them to give a real address by telling them that you will send a coupon, more information, or a link they need to click to verify their account. It all really depends on how bad you want your email address. If you aren't going to validate addresses in some way, then you probably shouldn't require people to give you their email address.

- **Destination Unreachable** - The destination system unreachable hard bounce type means that there was a connection issue with the email server. A destination system unreachable hard bounce is different than a bad email address hard bounce (which results in immediate removal of the contact in question). This bounce type means that
we will not retry sending this specific email to this specific contact at this time because it is not likely to succeed. Later deliveries to the contact may succeed.

- **Rejected Message Content** - The rejected due to message content hard bounce type means that the email server has identified the email as spam. We will not attempt to resend an email that results in a rejected due to message content hard bounce. If you see a number of these, then you should probably look at the message you are sending and take the time to run your message through the spam test provided on the Message Overview page. If you are still having problems or have questions about what may be causing this, please contact support.

- **Temporary Contact Issue** - Temporary contact issue means that there was a temporary issue at the receiving mail server with respect to the contact in question. An example of this is a mailbox full message. There isn't too much you can do about a temporary contact issue bounce. It may, however, be an early indicator that a user has abandoned this email address. If you want to be pro-active and try to stem these type of bounces from occurring, include the manage preferences link (using `%%!manage_url%%`) within your emails, in addition to the unsubscribe link. This allows users to easily update their email address.

- **Destination Temporarily Unreachable** - Destination system temporarily unreachable soft bounce type means that there was a temporary issue at the receiving mail server, such as a server busy message. A destination system temporarily unreachable bounce may be resolved via retries. If it is not, there is little you can do about this.

- **Deferred Message Content** - Deferred due to message content is quite similar to the rejected message content bounce. Emails aren't often identified this way, as ISPs don't want you to resend something they identify as spam. If you are seeing a majority of your emails being classified as deferred due to message content bounces, you should check your message and see if you can reduce its likelihood of being identified as spam.

When an email bounce occurs, the bounce will be placed within one of seven categories within the application. Six of the seven categories are assigned a 1 or a 0. This is where the email bounce limit for your account comes into play. By default, the email bounce limit is set to 5. If a contact accumulates 5 consecutive bounces with a 1 assigned to it, then the contact will be automatically given a status of inactive. A status of inactive means the contact is disabled and cannot receive messages from you. The lone application email bounce type that is not assigned a 1 or 0 is Bad Email Address. Contacts that bounce because of a Bad Email Address are immediately given a status of inactive.

The chart below provides a visual representation of the information contained in the previous three paragraphs.

---

You will notice that we refer to contacts bouncing and not email messages. In reality, an email message can bounce, but we don't count bounces that occur because of a problem with the email message. This is the reason why we assign a value of 0 to email bounces with an application bounce type of Rejected Message Content and Deferred Message Content. We do this because our goal with creating an email bounce limit is to help promote good list
hygiene. We want to help you rid your list of contacts that you cannot deliver emails too. If a bounce occurs because of email message content, then we don't want to remove a contact from your list because it's not their fault the bounce occurred.

**Passing Contact Data Via URLs**

When you use URLs to pass contact data from your site to Bronto it is a best practice not to expose any PII in the URL. This includes email addresses.

In the past, Bronto customers have used email addresses as a contact identifier when passing analytics or browse data via a URL. However, to comply with current web standards, you should use Bronto's external ID (EID) instead.

EID is a unique, Bronto-specific identifier for each contact that does not reveal any personal contact information (PII). To switch to EID:

1. Go to **Home > Connections Center** then click on **Custom Analytics**.
2. In the **Custom Keys & Values** area:
   - Replace the key **contact_email** with **contact_eid**
   - Replace the value `%%!contact_email%%` with `%%!contact_eid%%`
3. Save your changes.

If you don't use **Browse Recovery**, there's nothing else you need to do in Bronto. However, if you use Google Analytics see the Adjust Google Analytics section below for information on how to make sure Google continues to report URL metrics appropriately.

**With Browse Recovery**

If you do use **Browse**, you also need to update your browse settings to use EID instead of email address. To do this:

1. Go to **Home > Settings > Browse**.
2. Click the settings gear icon 🔁.
3. Click **Selectors**.
4. Enter **contact_eid** in the **Contact ID URL Parameter(s)** box.
5. Save your changes.

Bronto will now use the EID to find and associate browse data with a contact.

**Adjust Google Analytics Settings**

When you pass contact_eids via a URL, Google Analytics may treat each URL with EID appended as a unique URL. This means Google Analytics will not report aggregate clicks for `http://example.com/example.html` when contact_eid is appended as a query parameter. Instead, each time `http://example.com/example.html?contact_eid=XXXXX` is passed, Google will report this as a separate URL instance.

To prevent Google from doing this, simply add contact_eid as an excluded query parameter in your account's **View Settings**. This tells Google to ignore the contact_eid parameter for the purpose of metrics reporting, but does not prevent the contact_eid from being passed to Bronto. To do this:

1. Log into your Google Analytics account.
2. Go to your **Admin** panel.
3. Navigate to the relevant **Account** and **Property** by selecting them from the lists.
4. In the **View** list, make sure **All Website Data** is selected.
5. Click **View Settings**, located under **All Website Data**.
6. Add contact_eid to the **Exclude URL Query Parameters** box.
7. Click **Save**.

Repeat these steps, as necessary, for any other accounts or properties in Google Analytics that collect metrics for URLs that include contact_eids.

**CAN-SPAM Act**

The CAN-SPAM Act of 2003 (Controlling the Assault of Non-Solicited Pornography and Marketing Act) establishes requirements for those who send commercial email.

CAN-SPAM spells out penalties for spammers and companies whose products are advertised in spam if they violate the law, and gives consumers the right to ask emailers to stop spamming them. Failure to comply with the CAN-SPAM Act can result in decreased deliverability (i.e. your messages get flagged as spam), placement onto an ISP's or spam filter's blacklist, and a potential $11,000 fine. Additionally, we will eventually remove you as one of our customers if violations of the CAN-SPAM Act persist.

In order for your email messages to be compliant with the CAN-SPAM Act, all of your email messages must comply with the requirements listed below.

- No false or misleading header information. Your email's “From” and “To” must be accurate and identify the person who originated the email.
- No deceptive subject lines. The subject cannot mislead your contacts about the contents or subject matter of the email message.

**Tip:** For more information on writing good subject lines, see Effective Email Subject Lines on page 203.

- You must give your contacts an opt-out method. You must include either a return address or other internet-based response tool that allows a contact to ask you not to send future email messages to that email address. You must honor this request and stop sending that contact email within 10 business days. It is also illegal for you to sell or transfer the email addresses of people who choose not to receive your emails, unless you transfer the addresses so another entity can comply with the law.
- All commercial email must be identified as an advertisement and include your valid physical postal address.

The application offers the following features to help you ensure that your email messages are CAN-SPAM compliant:

- You can insert the %%account_address%% special tag into the body of your email message when creating it. This special tag will add your whole address to the email message in the following format: (organization, address1, address2, city, state, zip code, and country). You can also add individual address special tags that only display certain parts of your address.

**Tip:** For more information on special tags, see Special Tags on page 152.

- While composing the email message, you can choose to add a CAN-SPAM compliant footer. This option will identify who the email message is from and your physical mailing address in the footer of the email.
- To handle opt-out requests, you can link to either the Manage Preferences or Unsubscribe webform. Both of these pages allow for a contact to opt-out of receiving email messages from you.

**Tip:** For more information on the Manage Preferences and Unsubscribe webform, see Webforms.

**Important Things To Remember About The CAN-SPAM Act!**

- The CAN-SPAM Act represents the minimum requirements that an email message must have to reach an Inbox. Often times ISPs and spam filters will have stricter guidelines.
• If you fail to include an opt-out option in your email messages, we will automatically add an unsubscribe link.
• As of August 15, 2008, we require that you make use of address tags to provide your address within your emails. If you do not include address tags, you will be warned that your email message does not include an address and is not CAN-SPAM compliant. We will then add your address for you. You are required to either use the %%account_address%% tag, or the individual address tags. If you choose to use the individual address tags, you must at least use those marked as required.

Tip: For more information on address tags, see Special Tags on page 152.

Related Topics

Good HTML Email Design

Tips for good design when using HTML to create your messages.

Many marketers overlook the effect that design can have on the deliverability of an email message. In light of the increasing use of preview panes, filters, and the default blocking of images in popular email clients such as Gmail and AOL, here are three primary design best practices that will help you successfully reach your target audience.

Code Carefully

Use efficient HTML code and avoid designing your email with any programs that allow you to "Save for the Web."

Here are a few guidelines for good HTML email message design:

• Properly close HTML tags. Poorly formed HTML often results in email messages being rendered in surprising and undesirable ways. Most mail clients are smart enough to know that if you don't close a paragraph tag, then you probably made a mistake and it will add one in for you. However, other things, like table tags, are pretty tricky. In this case, the email client might guess correctly or it might not - or it might not even try to fix it. Your email message could look fine, or it could be mangled completely. It's a lot like leaving the punctuation out of an entire paragraph - people can guess what you meant to say, but they might guess wrong.

• Be mindful of CSS (Cascading Style Sheets). Don't link to external style sheets. Use inline styles tied to individual HTML tags since they display more reliably. Also, don't embed CSS in the head tags. Many email clients strip those tags from email. If you do use CSS, be sure to test extensively. Some email clients strip it out completely or mangle it. Some web-based mail clients combine your CSS with their own, breaking down the look of their application as well as the look of your email message.

Tip: A really good way to test how your email messages will look in a variety of different inboxes is to make use of the Previewer app. For information see Previewer on page 971.

• Use an HTML validator. HTML validators make sure your message uses properly formed HTML. Professional web design packages and browser add-ons, such as HTML Tidy, often include this feature.

• Keep a balance between text and images. Filters are on the lookout for email messages with only images. If you embed your text and graphics into a single image, you risk your message going straight to the contact's Junk box.

• Include an alternative text version of your message. In addition to being another criteria for some filters, the text version of the message ensures readability by email clients that are not receptive to HTML messages.

Tip: For more information on the text version of email messages, see View A Text Version Of An Email on page 970.

Design Simply

There are many different types of email clients and the way in which they display email messages can vary wildly. For the best, most reliable results, keep your email message and HTML code as clean and simple as possible. Here are some more specific guidelines:

• Design your newsletters top-to-bottom and don't overuse tables. Using multiple columns or nested tables can be very unstable. In fact, two columns can turn into a straight vertical line in some email clients. In most cases, it isn't worth the risk of your HTML "blowing up" due to excessive table tags. Tables also typically add a significant amount of extra bulk and extraneous HTML to your email message.
• Avoid Flash. Embedded Flash does not work consistently in most email clients other than Mac Mail (only because it uses Quicktime, not Flash, to play). Relevant, concise copy, a compelling call to action, and clean simple design will create more reliable and consistent impact than a risky "flash in the pan" mailing. If you do want to include Flash or other audio/video elements, it is most effective to include them on the adjoining webform, rather than embedding in the email message.

• Avoid JavaScript. JavaScript is disabled in most clients as a security precaution. Leave JavaScript out altogether, rather than risk having your audience see a JavaScript warning when trying to read your email message.

• Use absolute links versus relative ones. Relative links open up the risk of all links and images being broken in the email because the mail client won't know where to go to get them. It's like giving the mailman your house number and street but no city or state. If you code a link to go to http://espn.com/stats/, it has all the info that it needs to get to where you want it to go. However, if you just code the link as /stats/, then it's not complete and things will break.

• Don't link to images used elsewhere on your website. Your web designer may replace, rename, or delete these images and inadvertently cause your images not to be displayed in your email. By hosting your images in the application (or at the very least, separate from your other website images), you will avoid problems with broken links showing up in your email and probably speed up the display of these images.

  Tip: For more information on hosting images in the application, see Upload Files To Bronto on page 1161.

Test, Re-Test, and Test Again

If you don't have a distribution list for testing, stop what you are doing and immediately set up one! Never rely solely on your internal email client and standard browsers for testing. You should conduct tests for the major ISPs (AOL, Gmail, Yahoo, Hotmail, etc.) as well as other email providers that make up a large proportion of your email lists. Also, test the readability of messages in different browsers (Internet Explorer, Firefox, Safari) to verify that your text and images translate successfully in each. Make a checklist for yourself of critical items that you will test across multiple ISPs and browsers. For example:

• Cascading Style Sheets are not altered or mangled.
• HTML images are not blocked or there is a proper placeholder for the image if it doesn't appear.
• Images are hosted with your ESP and not linked from elsewhere on your website.
• An alternative 'text version of this email' label is displayed.
• If the email client strips out your text and changes the background color, you can still read your message.
• If used, columns and tables are unaltered.
• URL links function properly.

  Tip: You can send test messages in the application before actually scheduling your real deliveries. For information on sending test messages, see Message Testing Program.

  Tip: Before you actually send your message, it's a good idea to run through our sending checklist to make sure everything is in order. To view the sending checklist, see Email Checklist: Before You Send on page 202.

Email Checklist: Before You Send

Before sending out your email messages, run through our email checklist to make sure that your email message is ready to go.

The Musts

• Spell-check.

  If you are using the WYSIWYG editor, you can use the built-in spell checker. For information on using the spell checker in the WYSIWYG editor, see Spell Check Your Message Using The WYSIWYG Editor on page 110.

• Check for grammar mistakes.

• Revise any unclear sentences.

• Shorten the copy when appropriate.
• Place alt text behind any important images.
• Make sure you have a text version of your email that has been tweaked accordingly.
• Check for a working unsubscribe link and physical address: CAN-SPAM musts.

For more information on CAN-SPAM compliance, see CAN-SPAM Act on page 200.
• Use a recognizable from name.
• Rethink your subject line. Is it compelling and non-misleading with the most important words mentioned first?

For information on writing a good subject line, see Effective Email Subject Lines on page 203.
• Make any offer deadlines clear and visible.
• Send test versions (both HTML and text) to yourself and others.
• Click on every link in your email. Do they go to the right place?
• Test the entire call-to-action process. Can you actually register, buy, etc. smoothly with the desired outcome?
• Identify and make sure you'll be sending to the right list. Make sure those contacts are opt-in only.

The Best Practices
• Make sure your from address is that of a real person/department and not a do-not-reply.
• Include a call-to-action pre-header and a link to your online version.
• Highlight an appropriate link in the navigation bar to stand out.
• Optimize your preview pane.
• Make sure calls-to-action are as high up in the email as possible.
• Is the call-to-action mentioned more than once? It should be.
• Consider placing whitelisting instructions in your header or footer if appropriate.
• Offer contacts the option to manage their preferences.
• Set up an A/B split test. Test the subject line, time of day, day of week, from name, offer, CTA - whatever makes sense.

For more information on A/B split testing, see A/B Split Tests on page 321.
• Segment your list for more targeted messaging if possible.

For more information on segments, see Segment Builder on page 435.

Effective Email Subject Lines

We've provided tips for writing subject lines that will catch reader's attention.

• Get to the point! - Numerous studies show that the best subject lines are between 30 and 40 characters. The challenge for you is balancing length and content. We recommend that you employ direct language and descriptions, and always include your brand name in the subject line.
• Avoid obvious pitfalls - Before you send an email, run it through a spam test to diagnose potential content problems. Be careful not to sound “spammy” in your subject line. Avoid phrases like “Free”, “Offer”, “Money”, excessive use of exclamation marks, misspelled words, ALL CAPS, etc.
• Relevancy is key - Speak to your contacts on a one-to-one basis. Use personalization to refer to contacts by name, geography, or group. “XYZ Event - October 30” is an OK subject line. “Bob - XYZ is in New York on October 30” is a better subject line. Relevancy in your subject lines is absolutely critical in convincing a contact to open a message.

Tip: For more information on using special tags to personalize your message, see Special Tags on page 152.
• Testing 1,2,3 - Find what works for you. Define objectives, set benchmarks for opens, clicks, conversions, etc. Continue to customize and refine your subject lines overtime to find the right phrasing or structure. Also, once you think you have it figured out, don't become complacent. Continue to test, re-test, and look for new ways to engage your audience.

Tip: One way to test the effectiveness of your subject lines, is to perform an A/B Split Test. For more information on setting up an A/B Split Test, see A/B Split Tests on page 321.
Related Topics
Persado Predict on page 1275
Persado Predict analyzes your subject lines and estimates how your subject lines are likely to perform with a predicted open rate uplift.

Webforms
Webforms provide you with a powerful way to sign-up new contacts, collect information from existing/future contacts, and allow your contacts to easily manage their preferences.

The All Webforms page lets you view all of the webforms that have been created in your account. When you first join Bronto there is one existing default webform for each type of webform. There are seven different types of webforms. Each type of webform is displayed on the All Webforms page. You can use the sidebar to quickly filter your list of webforms by type.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>User-defined name of the webform.</td>
</tr>
<tr>
<td>Webform ID</td>
<td>System ID for the webform. This can be used when you want to create a link to your webform in email messages.</td>
</tr>
<tr>
<td>Form Type</td>
<td>Type of webform. Each webform type serves a unique purpose. For more information see Types of Webforms on page 204.</td>
</tr>
<tr>
<td>Default Form</td>
<td>Indicates if the webform has been made the default for that type of webform. The default webform is always the webform shown for that type of webform unless another webform is specifically selected instead. See Make A Webform The Default Used on page 234.</td>
</tr>
<tr>
<td>Last Modified</td>
<td>Date and time the webform was last updated.</td>
</tr>
</tbody>
</table>

There is no limit to the number of webforms you can create.

Types of Webforms
Descriptions of the available types of webforms.
The following describes the Webform options.

Add Contacts Webform
Add Contacts webforms allow you to collect email addresses and contact information.
A contact on the suppression list cannot be added to your account until the email address is removed from the suppression list. If a contact who is on the suppression list attempts to sign-up to receive email messages from you via an Add Contacts webform or via Direct Add, they will not be added as a contact in your account.

For more information on using the suppression list, see Suppression Lists on page 1403.

**Subscription Confirmation Webform**

Subscription Confirmation webforms are shown to contacts after they confirm that they want to receive marketing emails from you by clicking a subscription confirmation link in a message. These links can be added to your email by adding the `%%!confirm_url%%` special tag to the footer or body of the email message. If you are using the email message editor, you can add your webform link by using the Insert menu to insert a Webform Link Tag.

When the email message is sent, the `%%!confirm_url%%` special tag is replaced with a link. For more information on special tags, see Special Tags on page 152. When a person clicks the link, they are taken to a Subscription Confirmation webform and they become an active contact that can receive marketing emails from you. For more information about contact statuses see Contact Status on page 1083.

Clicking this link in a message you send counts as a . Contacts who tend to be more engaged and lead to more conversions from your marketing campaigns.

**Manage Preferences Webform**

Manage Preferences webforms allow your contacts to update their information and manage their subscriptions. Like other webforms, you have the ability to embed your logo, customize the CSS, and add additional text.

Unlike other webforms, Manage Preferences webforms allows you to choose lists and fields that you wish to make visible on the webform. In doing so, you allow contacts that visit the webform to update their profile data and list preferences. Once you have customized the webform, you can make it available to your contacts by adding a link to it the body or footer of your message. To do this, add the `%%!manage_url%%` special tag to the body or footer of your message. This will provide a personalized link to the Manage Preferences webform.

For more information on special tags, see Special Tags on page 152.
Note: When a contact clicks the Click here to unsubscribe link the contact is automatically given a status of Unsubscribed, per CAN-SPAM compliance, and will no longer receive marketing emails from your account.

Unsubscribe Webform

Unsubscribe webforms allow you to provide your contacts with a simple, direct mechanism to unsubscribe from receiving marketing emails from you. When a contact is unsubscribed, they will be given a status of Unsubscribed and will no longer receive marketing emails from your account.

Some key things to remember about Unsubscribe webforms are:

- **Manage Preferences** webforms contain a link to unsubscribe. This link does not link to the Unsubscribe webform, but instead will automatically unsubscribe the contact.
- If you send an email that does not contain a link to a Manage Preferences or Unsubscribe webform, Bronto automatically appends a link to an Unsubscribe webform in the email.
- We strongly recommend that you use footers to take advantage of this functionality. Much like a signature in your personal email, you can customize your footer(s) with a link to an Unsubscribe webform and any other relevant information, such as your postal address. Once you've set up a footer, you can re-use it with numerous email messages. For more information on adding a link to an Unsubscribe webform in an email message, see Insert Edit Or Remove Links Using The WYSIWYG Editor on page 107. For more information on footers, see Headers And Footers on page 142.

Providing an easy way for contacts to unsubscribe from receiving marketing emails from you can have a positive impact on both your delivery and sender rating. For more information on how this can positively affect your delivery and sender rating, see Sender and Delivery Rating on page 309.

We suggest that you consider providing links to Unsubscribe and Manage Preferences webforms in your email messages. By offering both options, you provide a simple way for your contacts to have complete control over their subscription preferences. For more information on adding links to Unsubscribe and Manage Preferences webforms
in your email messages, see Insert Edit Or Remove Links Using The WYSIWYG Editor on page 107 or Special Tags on page 152.

Note: Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.

Forward To A Friend Webform

Forward to a Friend webforms allow existing contacts to forward email messages to others. A Forward to a friend is preferred to a simple forward through an email client because it allows the application to track who forwarded the message, who they forwarded it to, and helps ensure consistent message formatting. The forwarded message includes a customizable note at the top in order to introduce the email to the recipient. We recommend adding a link to a sign-up page in the note to help acquire new contacts. A link to a Forward to a Friend webform can be added to an email message by adding the %%!forward_url%% special tag to the footer or body of an email message.

```
Forward Message to a Friend
To share the message with the subject How Fall Safe From Example Inc. with one or more friends, please enter their email addresses, separated by commas, in the area below. Optionally, you may add an additional note you wish to include along with the message. When you are ready, click Send Message.
```

Note: If a message forwarded using a Forward to a Friend webform contains field tags used to personalize the message, and the message is forwarded by one of your contacts to another contact in your account, the field tags used in the message will update to reflect field data for the contact receiving the forwarded message. For example, let's say you have a contact in your account named Logan. In the firstname field for Logan, you have Logan stored. Let's say Logan uses one of your Forward to a Friend webforms and forwards a message, which happens to contain the %%firstname%% field tag, to his friend Taylor. Taylor is also a contact in your account. When Taylor receives the forwarded message, in place of the %%firstname%% field tag, they will see Taylor.

For more information on special tags, see Special Tags on page 152.

Thank You Webform

Thank You webforms will be shown after a contact submits a webform. There is no need to provide a link to this page in your message body. The application automatically re-directs contacts to this page after they have asked to receive emails from you via an Add Contacts webform.

If the contact is asking to receive marketing emails from you, they will need to confirm their subscription via an email that will be sent to them after submitting an Add Contact webform.
Lookup Contact Webform

Lookup Contacts webforms allow existing contacts to update their profile information. After submitting their email address through via a Lookup Contacts webform, the contact will receive an email with a link to a Manage Preferences webform. A link to a Lookup Contacts webform can be added to an email message by adding the %%!lookup%% special tag to the footer or body of an email message.

For more information on special tags, see Special Tags on page 152.

Complaint Webform

Complaint webforms allow contacts to report unsolicited email they have received from you. When a contact submits a Complaint webform, they will be unsubscribed and marked as Inactive. Providing a simple way for contacts to report unsolicited email helps to ensure that you only send to contacts who want to receive email from you.
For more information on special tags, see Special Tags on page 152.

For more information on the difference between Active and Inactive contacts, see Difference Between Active And Inactive Contacts.

The Form Complaint - Bronto Feedback metric on Deliverability reports displays the number of contacts who were unsubscribed after submitting a Complaint webform. For more information on viewing the Form Complaint - Bronto Feedback metric for messages and deliveries, see From Complaint - Bronto Feedback Metric on page 873 and Delivery Report Deliverability Metrics.

Related Topics
Special Tags on page 152
Special tags can be used to customize messages based on commonly used data in Bronto.

Choose A Type Of Webform
The first thing you need to do when creating a webform is choose the type of webform you want to create.

To choose the type of webform:
1. Go to Content > Webforms.
2. Click the Create New Webform on the top right of the page.
3. Give the webform a name in the Webform Name text box.
4. Give the webform a title in the Title text box.
The **Title** (aka Window Title) text box is used to add the title that is displayed in the window when the webform is viewed publicly.

5. Choose the type of webform you want to create from the **Type** pull-down menu.

   For more information on each type of webform, see **Types of Webforms** on page 204.

6. Click **Next**.

![Creating Webform](image)

### Where To Use A Webform

**Tips for where to place your webform.**

The most common use for webforms is to include a **Manage Preference** webform in your Bronto messages. To be CAN-SPAM compliant, every email sent from Bronto must contain either a link to a **Manage Preferences** or **Unsubscribe** webform so contacts have the option to opt-out of marketing messages. If you do not include one of these webforms, Bronto automatically appends a link to an **Unsubscribe** webform in the email.

Webforms are also a great tool for data collection. Effective contact data collection begins with a well-placed webform. Start with a webform on your home page. Make sure that it stands out, clearly specifies the nature of your communication, and allows for quick and easy registration. Also, make sure to put links to webforms in your newsletter. This way, if your contacts forward the message to a friend, the friend has the opportunity to join your mailing list.

You could also try adding a webform to:

- online order forms
- free trials and downloads
- online contests
- coupons or discount incentives
- off-line collection points (i.e. your point of sale, customer support center, direct mail programs, comment cards, etc.)

### Embed A Webform (Only Available For Lookup Contact And Add Contact Webforms)

For **Add Contacts** and **Lookup Contacts** webforms, you can access code to embed the webform.

The code provided in the **Embed This Form** section is the basic HTML framework for the webform you have created. It will not include advanced functionality such as the **Log in with Facebook** button, or the javascript date picker for date fields. The embed form option is intended for integrating basic Add Contacts functionality with maximum design flexibility and full customization.
A contact on the suppression list cannot be added to your account until the email address is removed from the suppression list. If a contact who is on the suppression list attempts to sign-up to receive email messages from you via an Add Contacts webform or via Direct Add, they will not be added as a contact in your account.

For more information on using the suppression list, see Suppression Lists on page 1403.

To access the embed webform code:

1. Go to Content > Webforms.
2. Click in the row associated with the webform you want to embed.
3. When the preview appears, scroll down to the Embed This Form section.
4. Copy and paste the provided HTML code onto a page on your website.

**Access The Public Link To A Webform (Only Available For Lookup Contact And Add Contact Webforms)**

For Add Contacts and Lookup Contacts, you can access a public URL to link to the webform.

To access the public URL for a webform:

1. Go to Content > Webforms.
2. Click in the row associated with the webform you want to embed.
3. When the preview appears, scroll down to the Public Link To This Webform section.

You will be shown the public link to the webform.

**Add A Manage Preferences Webform To Your Site**

Sometimes you might want to provide the ability for contacts to update their preferences from your site instead of sending them a manage preference webform link via email.

Bronto has provided a way for you to allow a contact to securely access their manage preferences webform from a link on your site.

**Note:** This task requires some coding knowledge.

To add manage preference webform access to your site:

1. Set up a shared secret in Bronto:
   a) Go to Home > Settings > Data Exchange.
   b) Scroll to the Webform Shared Secret section and enter a secret key in the Secret box.
c) Click **Save**.

2. Preview the manage preferences webform you want to use on your site:
   a) Go to **Content > Webforms** and locate the webform in the grid.
   b) Click the preview icon.

The preview for the webform opens and the **Subscriber Lookup For This Webform** information is below the webform preview.

If you preview a webform from the **Edit Webform** page, you will not see the **Subscriber Lookup For This Webform**.

3. Use the information in the **Subscriber Lookup** link to create a SHA256 HMAC (encoded as lowercase hexits) for each contact you want to be able to use this webform.

This will be used to replace the `{VALIDATION_HASH}` in the **Subscriber Lookup** link. The SHA256 HMAC is a combination of

- **Site ID**: the site ID is the url segment that appears before `/manpref/` in the **Subscriber Lookup** link.
- **Webform ID**: the webform ID is the url segment that comes after `/lookup/` in the **Subscriber Lookup** link.
- **Contact ID**: the email address or API ID for the contact
- **Webform Shared Secret**: the shared secret you created in step 1.

The Site ID, Webform ID, and Webform Shared Secret will always be the same for a webform. (But is unique to that webform.) The Contact ID is unique to a contact. Therefore, if you have 100 contacts you want to access this webform, you will need to generate a unique SHA256 HMAC for each contact.

**PHP example:**

```php
hash_hmac('sha256', $siteId . $webformId . $contactId, $sharedSecret);
```

A SHA256 HMAC is created outside of Bronto. If you need help with this step, contact one of the developers at your company.

4. Format the manage preferences webform links and add each link to your site.

A link is the provided **Subscriber Lookup** link appended with a specific contact ID (instead of `{CONTACT}`) and the SHA256 HMAC you made for that ID (instead of `{VALIDATION_HASH}`).

**For example:**

```http
http://www.websitename.com/public/webform/lookup/g8zognuh6m0swbchdwvl44skhizup/b5e48a935f88321f0aa6d44590cce6fa/manpref/someone.great@bronto.com/56374496b06792570c8f8a72149afcb691bbd025978af666f9ad5f724283
```
After you make a link and make it accessible to the contact on your site, the contact will be able to securely access the manage preferences webform from your site and update the information included in the form. Remember, each contact will need a link specific to that contact in order for the webform to work properly.

### Build A Webform

Once you have selected the type of webform you want to create, you can begin building the webform by adding **Layout Blocks** and **Content Blocks** to the webform. **Layout Blocks** are used to define the number of columns used in the layout of a webform. **Content Blocks** are individual sections that comprise the content of a webform. You can adjust the CSS and layout used in the webform, as well as in individual **Content Blocks**. Depending on the type of webform you choose to create, certain **Content Blocks**, known as **Special Purpose Content Blocks**, are required in the webform.

### Webform Content Blocks

Webform content blocks are individual sections that comprise the content of a webform. Each Webform has a set of content blocks that you can add to it. Most content blocks, like Email Address, are available on several different types of webforms and a few special content blocks, like CAPTCHA, are only available on one type.

You can add content blocks to your webform by dragging them onto the webform workspace.

#### Special Purpose Content Blocks

Special Purpose Content Blocks are blocks of content suggested, and in some cases required, for the a particular type of webform. These content blocks are not the same thing as message editor content blocks.

Special purpose content blocks are located above the body of a webform when you are creating or editing a webform. Depending on the type of webform you are creating, you will see different Content Blocks listed in the Special Purpose Content Blocks section. Sometimes a webform will require you use a special purpose content block in order for the webform to be considered complete. These blocks are denoted with red **Required** text and you will not be able to successfully save your webform without including them.

The following table describes all of the special purpose content blocks:

<table>
<thead>
<tr>
<th>Content Block</th>
<th>Description</th>
<th>Relevant Webforms</th>
</tr>
</thead>
</table>
| CAPTCHA       | Allows you to add a CAPTCHA verification to the Add Contact webform in order to prevent attacks from spambots. For more information see Include CAPTCHA On Add Contacts Webform on page 217. | Applies to:  
  • Add Contact |

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<table>
<thead>
<tr>
<th>Content Block</th>
<th>Description</th>
<th>Relevant Webforms</th>
</tr>
</thead>
</table>
| Email Address         | Creates a text box that a contact can use to enter their email address. You can set this field to be a either a required or not required field for a contact by  
1. Add the Email Address special content block to the webform.  
2. Mouse over the content block on the webform.  
3. Click either Required field or Optional field, depending on what the current setting is.  
4. Select the desired setting from the Change Display list.  
5. Click Done.  
|                        | Applies to:  
• Add Contact  
• Lookup Contact  
• Manage Preferences |
| Email Address (Verify) | Creates a text box that can be used to validate that the email entered in the email address text box is correct by validating that the email address (verify) entry matches the email address entry.  
|                        | Applies to:  
• Add Contact  
• Lookup Contact  
• Manage Preferences |
| Friends' Email Address| Creates a text box that contacts can use to enter their friends' email addresses. You can set this field to be a either a required or not required field for a contact by  
1. Add the Email Address special content block to the webform.  
2. Mouse over the content block on the webform.  
3. Click either Required field or Optional field, depending on what the current setting is.  
4. Select the desired setting from the Change Display list.  
5. Click Done.  
|                        | Applies to:  
• FTaF (Required) |
| From Name             | Creates a text box that a contact can use to enter their name so the friend knows who forwarded the webform.  
|                        | Applies to:  
• FTaF (Required) |
| Login With Facebook   | Creates a link that allows contacts to login using Facebook so that they can update, add, or lookup information they have stored with you. For more information see Allow Contacts To Login With Facebook on page 218.  
|                        | Applies to:  
• Add Contact  
• Manage Preferences |
<table>
<thead>
<tr>
<th>Content Block</th>
<th>Description</th>
<th>Relevant Webforms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>Creates a text box that a contact can use to enter their complaint. This</td>
<td>Applies to:</td>
</tr>
<tr>
<td></td>
<td>information will help clarify why a contact felt a message is unsolicited.</td>
<td>• Complaint (Required)</td>
</tr>
<tr>
<td>Mobile Phone Number</td>
<td>Creates a text box that a contact can use to enter their mobile phone</td>
<td>Applies to:</td>
</tr>
<tr>
<td></td>
<td>number. If your account uses SMS messages, they can be sent to this number.</td>
<td>• Add Contact</td>
</tr>
<tr>
<td></td>
<td>For more information see <a href="#">Capture Mobile Numbers From A Webform</a> on page</td>
<td>• Lookup Contact</td>
</tr>
<tr>
<td></td>
<td>219.</td>
<td>• Manage Preferences</td>
</tr>
<tr>
<td>Note to a Friend</td>
<td>Creates a text box that contacts can use to enter a message to their friends.</td>
<td>Applies to:</td>
</tr>
<tr>
<td></td>
<td>The message will be included in the email that the friends receive when the</td>
<td>• FTaF</td>
</tr>
<tr>
<td>Preferred Message Format</td>
<td>Allows contacts to specify if they prefer HTML or plain text messages.</td>
<td>Applies to:</td>
</tr>
<tr>
<td>Resubscribe Checkbox</td>
<td>Creates a checkbox that unsubscribed contacts can use to resubscribe on</td>
<td>Applies to:</td>
</tr>
<tr>
<td></td>
<td>the manage preferences webform. The resubscribe checkbox is required, but</td>
<td>• Manage Preferences (Required)</td>
</tr>
<tr>
<td>Required Checkbox</td>
<td>only unsubscribed contacts will see it when they access the webform.</td>
<td></td>
</tr>
<tr>
<td>Submit Button</td>
<td>Creates a button that is used to submit the information provided by the</td>
<td>Applies to:</td>
</tr>
<tr>
<td></td>
<td>contact via the webform. You can change the text that appears on the button</td>
<td>• Add Contact</td>
</tr>
<tr>
<td></td>
<td>by: 1. Add the Submit Button special content block to the webform. 2.</td>
<td>• Complaint</td>
</tr>
<tr>
<td></td>
<td>Mouse over the content block on the webform. 3. Click <strong>Edit</strong>. 4. Enter</td>
<td>• FtA (Required)</td>
</tr>
<tr>
<td></td>
<td>the desired text. 5. Click <strong>Done</strong>.</td>
<td>• Lookup Contact (Required)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage Preferences (Required)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Subscription Confirmation</td>
</tr>
<tr>
<td>Content Block</td>
<td>Description</td>
<td>Relevant Webforms</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Twitter User Name</td>
<td>Creates a text box that a contact can use to enter their Twitter user name. For more information see <a href="#">Capture Twitter Usernames From A Webform</a> on page 219.</td>
<td>Applies to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Add Contact</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage Preferences</td>
</tr>
</tbody>
</table>

### Add Special Purpose Content Blocks To Your Webform

Special Purpose Content Blocks are blocks of content suggested, and in some cases required, for the particular kind of webform you are creating. Depending on the type of webform you are creating, you will see different Content Blocks listed in the Special Purpose Content Blocks section.

**Note:** Special Purpose Content Blocks marked as Required represent the minimum elements required to make the webform functional, and must be added to the webform in order for it be saved and used.

To add Special Purpose Content Blocks to a webform:

1. Go to the [Edit Webform](#) page by editing an existing webform or by creating a new webform.
2. Move your mouse over the Special Purpose Content Block you want to add.
3. Hold down the left click button on your mouse.
4. Drag the Special Purpose Content Block into one of the gray boxes labeled Place content here.

The Place content here box will appear after you add a Layout block.

Forward To A Friend webforms have the Note to a Friend Special Purpose Content Block. This Special Purpose Content Block allows the contact to add a message that is displayed to the person they forward the message to. You can also add this content to the body of an email message using the %%#!ftaf_note%% special tag.

For information on using special tags, see [Special Tags](#) on page 152.

For Add Contacts, Lookup Contacts, and Manage Preferences webforms, you can add the Login With Facebook Special Purpose Content Block and allow your contacts to login using Facebook so that they can update, add, or lookup their information they have stored with you. For information on adding the Login With Facebook special purpose content block, see [Allow Contacts To Login With Facebook](#) on page 218.
Edit Special Purpose Content Block Labels In Webforms

When adding Special Purpose Content Blocks to a webform, you can edit the block's label (i.e. the name of the block shown to your contacts when they view the webform). This feature has multiple uses, including changing Special Purpose Content Block labels to support webforms created in different languages (aka internationalization).

To edit a Special Purpose Content Block label in a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Move your mouse over the Special Purpose Content Block you want to add.
3. Hold down the left click button on your mouse.
4. Drag the Special Purpose Content Block into one of the gray boxes labeled Place content here.

The Place content here box will appear after you add a Layout block.

5. Move your mouse over the block you just added.
6. Click Edit Label.

7. Add in the new label in the text box.

   Note: The label change you make here is unique to this webform and will not appear on other webforms. This does not change the default label.

   Tip: You can reset the label to the default by clicking Reset Label To Default.

8. Click Edit Label.

Include CAPTCHA On Add Contacts Webform

You can include CAPTCHA validation on your Add Contacts webform in order to make sure that contacts who sign up with it are real people. If you use your webform on a Bronto-hosted site or on a private domain, you can simply add the CAPTCHA Special Purpose Content Block to your webform. Otherwise, there are a few extra steps you will need to complete in order to set up CAPTCHA.

   Note: In order to work properly, a CAPTCHA key is associated with a specific domain. Because the CAPTCHA key for a private domain is associated with that domain, it cannot be previewed in Bronto due to a domain mismatch.

To add CAPTCHA:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Move your mouse over the CAPTCHA Special Purpose Content Block.
3. Hold down the left click button on your mouse.
4. Drag the CAPTCHA Special Purpose Content Block into one of the gray boxes labeled Place content here.

The Place content here box appears after you add a Layout block. For more information about layout blocks, see Add Layout Blocks To Your Webform on page 231.

If you are using your webform on a Bronto-hosted domain, or a private domain, then you're set. Finish building your webform and save it.

5. If you are not using your webform on a Bronto-hosted domain or a private domain:
   a) Go to the reCAPTCHA website and click Get reCAPTCHA.
   b) Enter your site domain and bronto.com in the Domains area.
   c) Provide a Label (something you will remember) and Owners (your email address) then click Register.

      After you click register, you are given a Site key and Secret key. Keep this page open because you will need this information.
   d) In Bronto, click Form Settings on your Add Contacts webform.

      The Form Settings window is displayed. The CAPTCHA Settings are on this page.

      e) Copy the Site key provided to you by reCAPTCHA and paste it into the CAPTCHA Site Key box in Bronto.
      f) Copy the Secret key provided to you by reCAPTCHA and paste it into the CAPTCHA Shared Secret box in Bronto.
      g) Click Done to save your CAPTCHA settings.
      h) Finish building your webform and save it.

Allow Contacts To Login With Facebook

For Add Contacts, Lookup Contacts, and Manage Preferences webforms, you can allow your contacts to login using Facebook so that they can update, add, or lookup their information they have stored with you.

To allow contacts to login using Facebook:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Move your mouse over the Login With Facebook Special Purpose Content Block.
3. Hold down the left click button on your mouse.
4. Drag the Login With Facebook Special Purpose Content Block into one of the gray boxes labeled Place content here.

      The Place content here box will appear after you add a Layout block.
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Make sure the Facebook fields are correctly mapped to the fields you have set up in your account. For more information on mapping Facebook fields to fields in your account, see Create Custom Contact Fields on page 562.

Capture Twitter Usernames From A Webform

Using the Twitter Username Special Purpose Content Block, you can allow contacts to provide you with their Twitter username (aka handle).

To add the Twitter Username Special Purpose Content Block to a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Move your mouse over the Twitter Username Special Purpose Content Block.
3. Hold down the left click button on your mouse.
4. Drag the Twitter Username Special Purpose Content Block into one of the gray boxes labeled Place content here.

The Place content here box will appear after you add a Layout block.

Capture Mobile Numbers From A Webform

Using the Mobile Phone Number Special Purpose Content Block, you can allow contacts to provide you with their mobile phone number.

To add the Mobile Phone Number Special Purpose Content Block to a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Move your mouse over the Mobile Phone Number Special Purpose Content Block.
3. Hold down the left click button on your mouse.
4. Drag the Mobile Phone Number Special Purpose Content Block into one of the gray boxes labeled Place content here.

The Place content here box will appear after you add a Layout block.

This will add a pull-down menu and text box to your webform that will allow your contacts to add their mobile number and corresponding country code.

By default, a person is not required to provide a mobile phone number in order to submit the webform. To require users to provide a mobile phone number:

1. Hover over the Mobile Phone Number Special Purpose Content Block you just added.
2. Hover over the Optional Field text.
3. Click Edit Option.
4. Select Required Field from the Change Display pull-down menu.
5. Click Done.

Add Field Content Blocks To A Webform

Field Content Blocks allow you to add checkboxes to your webform which correspond to fields you have created in your account.

To add a Field Content Block to a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Click the Fields tab in the Content Block section.
3. Move your mouse over the Field Content Block you want to add.
   You can use the search box to search for a specific field by name, or use the Select All/Select None links to select/deselect all of the fields in your account.

4. Hold down the left click button on your mouse.

5. Drag the Field Content Block into one of the gray boxes labeled Place content here.
   The Place content here box will appear after you add a Layout block.

You can see the Type set for the field you are adding by looking at the icon next to the Field's name. The Field type each icon represents is explained below:

- - checkbox
- - text
- - text area
- - radio button
- - number and decimal
- - date
- - currency
- - pull-down menu
- - password
The **All Fields** Content Block will add a checkbox to your webform for every field you have created in your account.

**Edit The Field Labels In Webforms**

When adding individual fields to a webform, you can edit the field's label (i.e. the name of the field shown to your contacts when they view the webform). This feature has multiple uses, including changing field labels to support webforms created in different languages (aka internationalization).

To edit a field's label on a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.

2. Click the **Fields** tab in the **Content Block** section.

3. Move your mouse over the **Field Content Block** you want to add.

   You can use the search box to search for a specific field by name, or use the **Select All/ Select None** links to select/deselect all of the fields in your account.

4. Hold down the left click button on your mouse.

5. Drag the **Field Content Block** into one of the gray boxes labeled Place content here.

   The Place content here box will appear after you add a Layout block.

You can see the **Type** set for the field you are adding by looking at the icon next to the Field's name. The Field type each icon represents is explained below:

- [ ] - checkbox
- text
- text area
- radio button
- number and decimal
- date
- currency
- pull-down menu
- password

6. Move you mouse over the field you just added.
7. Click **Edit Label**.

![Image of Edit Label](image.png)

8. Add in the new label in the text box.

   The label change you make here is unique to this webform and will not appear on other webforms. This does not change the default label. The default label is the label assigned to field when it was created.

   For more information on editing the default field label, see **Edit Contact Fields** on page 564.

   **Tip:** You can reset the label to the default by clicking **Reset Label To Default**.

9. Click **Edit Label**.

**Set Field Display Options In Webforms**

When adding fields to a webform, you can control how the fields are displayed to your contacts. You can make fields required, optional, or hidden.

![Image of Set Field Display Options](image.png)

To edit the display options for fields added to a webform:

1. Go to the **Edit Webform** page by editing an existing webform or by creating a new webform.
2. Click the **Fields** tab in the **Content Block** section.
3. Move your mouse over the **Field Content Block** you want to add.
   You can use the search box to search for a specific field by name, or use the **Select All/Select None** links to select/deselect all of the fields in your account.

4. Hold down the left click button on your mouse.

5. Drag the **Field Content Block** into one of the gray boxes labeled **Place content here**.
   The **Place content here** box will appear after you add a **Layout** block.

6. Move your mouse over the field you just added.

---

You can see the **Type** set for the field you are adding by looking at the icon next to the Field's name. The Field type each icon represents is explained below:

* - checkbox
* - text
* - text area
* - radio button
* - number and decimal
* - date
* - currency
* - pull-down menu
* - password
7. Move your mouse over the text **Required field**, **Optional field**, or **Hidden field**. The text that is shown depends on the display type currently selected for the field.

8. Click **Edit Option**.

9. Select one of the following from the **Change Display** pull-down menu:
   - **Required Field** - Displays the field as required when a contact views the webform.
     
     Note:
     Required fields will have a red asterisk next to them when a contact views the webform.

   - **Optional Field** - Display the field as optional when a contact views the webform.
   - **Hidden Field** - The field will not be visible to contacts, but the data in the field will be added to your account when the contact submits the webform. This can be useful for collecting additional data from a webform, outside of what is provided by contacts.

10. Click **Done**.

### Set The Current Date As The Default Value For Date Fields In Webforms

When adding date fields to a webform, you can set the default value for the field to the current date. When the webform is submitted, the current date will be used if no date is added by a contact. If you choose to make the field hidden and you set the default value to the current date, the current date will be used when the webform is submitted.

To set the current date as the default value for date fields:

1. Go to the **Edit Webform** page by editing an existing webform or by creating a new webform.

2. Click the **Fields** tab in the **Content Block** section.

3. Move your mouse over the date field you want to add. Date fields have the following icon next to them:

4. Hold down the left click button on your mouse.

5. Drag the **Field Content Block** into one of the gray boxes labeled **Place content here**.

   The **Place content here** box will appear after you add a **Layout** block.
You can see the **Type** set for the field you are adding by looking at the icon next to the Field's name. The Field type each icon represents is explained below:

- checkbox
- text
- text area
- radio button
- number and decimal
- date
- currency
- pull-down menu
- password

6. Move your mouse over the date field you just added. The **Use current date** checkbox will appear.
7. Click the **Use current date** checkbox.

![Image](image.png)

**Note:** The **Use current date** checkbox is only shown in edit mode and is not shown to your contacts.

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**Add A List Content Block To A Webform**

**List Content Blocks** allow you to add checkboxes to your webform that correspond to lists in your account. Your contacts can click these checkboxes when they view the webform to add them self to that particular list.

You can use the **Select All Lists** and **Deselect All** links to select all and deselect all lists displayed in the lists tab in the Content Blocks section.

To add a List Content Block to a webform:

1. Go to the **Edit Webform** page by editing an existing webform or by creating a new webform.
2. Click the **Lists** tab in the **Content Blocks** section.
3. Move your mouse over the List Content Block you want to add.

You can use the search box to search for a specific list by name, or use the Select All/Select None links to select/deselect all of the lists in your account.

4. Hold down the left click button on your mouse.

5. Drag the List Content Block into one of the gray boxes labeled Place content here.

The Place content here box will appear after you add a Layout block.

The All Lists Content Block will add a checkbox to your webform for every list you have created in your account.

Set List Display Options In Webforms

After you have added the All Lists content block or an individual list content block to a webform, you can hover over Show (default) and then click Edit Options to determine the behavior of the list(s) when a contact views the webform.

The options are:

- **Show (default)** - This shows checkbox(es) for the list(s) on the webform regardless of whether the contact is already on the list.

  Note: This is the same as the Unchecked (opt-in) option.
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- **Show if on list** - This option only shows the checkbox(es) for the list(s) if the contact is already on the list.
- **Auto-add (hidden)** - This option hides the checkbox(es) for the list(s) and automatically checks the checkbox(es) for the list(s), (hence adding the contact to the list(s)), when the webform is saved.
- **Pre-checked (opt-out)** - This option displays the checkbox(es) for the list(s) as pre-checked. This allows your contacts to opt-out of being added to a list or lists when the webform is saved.
- **Unchecked (opt-in)** - This option displays checkbox(es) for the list(s) as unchecked. This allows your contacts to opt-in to being added to a list(s).

Note: This is the same as the **Show (default)** option.

Add The SMS Subscription Keywords Content Block To A Webform

The **SMS Subscription Keywords Content Block** allows you to add checkboxes to your webform that correspond to SMS subscription keywords created in your account.

Your contacts can click these checkboxes when they view the webform to subscribe to particular keywords. For more information on creating SMS subscription keywords, see Create SMS Keywords on page 261.

Tip: Subscription based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.

Contacts cannot be subscribed to a keyword if you do not have a mobile number stored for them. Add the **Mobile Phone Number Special Purpose Content Block** to a webform to allow contacts to provide you with their mobile number. For more information on adding the **Mobile Phone Number Special Purpose Content Block** to a webform, see Capture Mobile Numbers From A Webform on page 219.

For the Add Contacts and Manage Preferences webforms, you can also set a default keyword for the webform in the Form Settings. When a contact submits the one of these webform, they will be subscribed to that keyword, provided you have a mobile number stored for them. If you also add the **SMS Subscription Keywords Content Block** to one of these webforms, then the contact will be subscribed to the default keyword selected for the webform, as well as any other keywords they choose to subscribe to. For more information on selecting a default keyword for an Add Contacts or Managed Preferences webform, see Choose A Default SMS Keyword To Subscribe A Contact To Upon Webform Submission on page 241.

To add a SMS Content Subscription Keywords Content Block to a webform:

1. Go to the **Edit Webform** page by editing an existing webform or by creating a new webform.
2. Click the **Keywords** tab in the **Content Blocks** section.

3. Move your mouse over the keyword you want to add.
   
   If you want to add checkboxes for all the keywords in your account, move your mouse over the **SMS Subscription Keywords Content Block**.
4. Hold down the left click button on your mouse.
5. Drag the keyword or **SMS Subscription Keywords Content Block** into one of the gray boxes labeled **Place content here**.
The Place content here box will appear after you add a Layout block.

Add HTML/Text Content Blocks To Your Webform

HTML/Text Content Blocks allow you to add much more diverse content to your webforms. You can add HTML/Text using one of three editors depending on your needs.

To add HTML/Text Content Blocks to your webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Click the Other tab in the Content Blocks section.
3. Move your mouse over the Content Block you want to add. You have the following options to choose from:
   - WYSIWYG & Images - This type of Content Block allows you to add HTML, text, and images using the WYSIWYG editor.
   - Plain Text - This type of Content Block allows you to add plain text content using a plain text editor.
   - HTML Code - This type of Content Block allows you to add raw HTML code to your webform.
   - Horizontal Line - This type of Content Block adds a horizontal line to the webform.
4. Hold down the left click button on your mouse.
5. Drag the Content Block into one of the gray boxes labeled Place content here.

The Place content here box will appear after you add a Layout block.
Note:

Any time an SMS call-to-action is used (e.g. Text Helptest to 33233 to receive a coupon), you must clearly display the following terms of service/conditions text:

Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms

This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

Add Or Edit Content In An HTML/Text Content Block

Once you have added an HTML/Text Content Block to your webform, you will need to add content to the Content Block.

To edit or add content to an HTML/Text Content Block:

1. Move your mouse over the area in your webform where you added the HTML/Text Content Block.
   
   A gray box will appear around the HTML/Text Content Block and the Edit and Delete links will appear.

2. Click Edit.

   A window will appear containing the editor associated with the type of HTML/Text Content Block you added.

3. Use the editor to add text, images, or links to the Content Block.
4. **Click Done.**

   **Note:**
   Any time an SMS call-to-action is used (e.g. Text HelpTest to 33233 to receive a coupon), you must clearly display the following terms of service/conditions text:

   ```
   Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms
   ```

   This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

   **Delete Content Blocks From A Webform**

   You can delete each type of **Content Block** (Field, List, Text/HTML, Special Purpose).

   **Warning:** Make sure you don't accidentally delete any of the **Special Purpose Content Blocks** marked as a **Required Element**. You will not be able to save or use the webform if it does not contain these required **Special Purpose Content Blocks**.

   To delete a Content Block from a webform:
   1. Go to the **Edit Webform** page by editing an existing webform or by creating a new webform.
   2. Move your mouse over the **Content Block** you wish to delete from your webform.
      
      A grey box will appear around the **Content Block** and the **Delete** link will appear.

   3. **Click Delete.**

   **Add Layout Blocks To Your Webform**

   Where as **Content Blocks** contain the content of your webform, **Layout Blocks** dictate how **Content Blocks** will be positioned in a webform.
To add a Layout Block to your webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. In the Content Layout section, select the type of layout you want for your webform. You can select:
   - Row: 1 Column
   - Row: 2 Columns
   - Row: 3 Columns
3. Move your mouse over the Layout Block you want to add.
4. Hold down the left click button on your mouse.
5. Drag the Layout Block into one of the gray boxes labeled Drag new rows here.

Reorder A Layout Block

Reordering a Layout Block allows you to move a Layout Block to a different position on a webform.

To reorder a Layout Block:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Move your mouse over the Reorder tab next to the Layout Block you wish to reorder.
3. Hold down the left click button on your mouse.
4. Drag the Layout Block to its new position on the webform.

Adjust The Column Styles Of Layout Blocks

To adjust the columns styles of a Layout Block:
1. Go to the **Edit Webform** page by editing an existing webform or by creating a new webform.

2. Click the **Edit Row** button next to the Layout Block you want to edit.

3. Adjust the width (in px) and the text alignment styles associated with the column.

4. Click **Done**.

**Webform Customization**

Most webform customizations can be found in the Webform Settings menu, but you can also use CSS.

Customizing the settings for a webform allows you to modify:

- Internal notifications
- Page submission settings
- Associated welcome messages
- Subscription confirmation messages

**Add A Name And Window Title To A Webform**

You can change a webform's name, and the title displayed in the window when the webform is viewed publicly.

- **Note:** Available on: All webforms.

To add a name and window title to a webform:

1. Create a new, or edit an existing, webform.

2. Click **Form Settings** on the top right of the page.

3. Give the webform a name in the **Webform Name** text box.

4. Give the webform a window title in the **Window Title** text box.

5. Click **Done**.
Make A Webform The Default Used

Making a webform the default means that it will become the default webform displayed to your contacts for that particular type of webform (Manage Preferences, Forward to a Friend, etc.). The default webform will always be shown unless another webform is selected to be displayed.

To make a webform the default webform:

1. Create a new, or edit an existing, webform.
2. Click Form Settings on the top right of the page.
3. Click the checkbox contained in this section.
4. Click Done.

Set Up Internal Notifications For A Webform

Note: Available on: Add Contacts, Manage Preferences, and Unsubscribe webforms.

In the Internal Notifications section, you can choose to send an email to specific email addresses when the webform is submitted. You can also choose to have the data collected from the webform included in the email.

To setup internal notifications for a webform:

1. Create a new, or edit an existing, webform.
2. Click Form Settings on the top right of the page.
3. Go to the Internal Notifications section and click the Send a notification by email checkbox.
4. Add the email address(es) you want to have receive the notification.
   Separate each email address with a comma.
5. Optional: Click the **Send form data attached to email notification** check box if want to have the data collected in the webform displayed in the notification email.

6. Click **Done**.

### Send Welcome Email After A Contact Uses Subscription Confirmation Webform

**Note:** Available on: Subscription Confirmation webforms.

After a contact uses a Subscription Confirmation webform, you have the option of sending them a welcome message. Sending contacts a welcome message when they opt-in is a good way to start contact engagement. Generally these messages should introduce the contacts to your brand and values.

![Welcome Message Settings](image)

To send a welcome email message after a Subscription Confirmation webform is used:

1. Open a Subscription Confirmation webform.
2. Click **Form Settings** on the top right of the page.
3. From the **Welcome Message Behavior** pull-down menu, choose if you want to send or not send the contact a welcome email message. You have two options:
   - **Do not send a welcome message**
   - **Send a message to anyone who uses this form**
4. Optional: If you choose to send contacts a message:
   a) Choose the email message that will be sent.
   b) Specify a from name in the **From Name** text box.
   c) Specify a from address in the **From Address** text box.
5. Click **Done**.

### Send Email After A Contact Submits Lookup Contacts Webform

When a contact submits the Look Up Contacts webform, you can choose to send them an email message.
To send an email message after the Lookup Contacts webform is submitted:

1. Create a new, or edit an existing, webform.
2. Click **Form Settings** on the top right of the page.
3. Optional: From the **Form Submission Message** section, choose the email message that will be sent after a contact submits the webform. Your email message will only send if it has been approved as a transactional message.
4. Specify a from name in the **From Name** text box.
5. Specify a from address in the **From Address** text box.
6. Click **Done**.

### Choose The Status Of Contacts Added Via An Add Contacts Webform

On **Add Contacts** webforms, you can select which contact status you want to give to contacts being added to your account via this webform.

For more information on the different contact statuses, see **Contact Status** on page 1083.

For more information on the sender/delivery rating, see **Sender and Delivery Rating** on page 309.

A contact on the suppression list cannot be added to your account until the email address is removed from the suppression list. If a contact who is on the suppression list attempts to sign-up to receive email messages from you via an **Add Contacts** webform or via **Direct Add**, they will not be added as a contact in your account.
For more information on using the suppression list, see Suppression Lists on page 1403.

Note: Available on: Add Contact webforms.

To choose the status of contacts added via an Add Contacts webform:

1. Create a new, or edit an existing, webform.
2. Click Form Settings on the top right of the page.
3. Go to the Add Contact Settings section and choose how you want to handle contacts being added via this webform.

By default, new contacts are added with a status of Onboarding. If you want to add them with a status of Unconfirmed, click the Add contact with status of Unconfirmed check box.

If you click the Add contact with status of Unconfirmed checkbox, contacts will be added to your account with a status of Unconfirmed. Contacts with a status of Unconfirmed have not yet agreed to receive email messages from you. Remember, one of our policies is that contacts must agree to receive your email messages in order for you to send email to them. Hence, you should send them a welcome email message containing a subscription confirmation link so they can confirm that they want to receive email messages from you. Allowing contacts to explicitly state their desire to receive email messages from you results in healthier lists, improved deliverability, and higher sender/delivery ratings. For more information on sending a welcome email message when a contact submits an Add Contacts webform, see Send Email After A Contact Uses Add Contacts Webform on page 238

Note: If you chose to add contacts with a status of unconfirmed, the message you choose to send will need to have been approved for transactional sending. For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

4. Click Done.

Related Topics
Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Create A Tracking Cookie For Contacts Added Using An Add Contacts Webform

Note: Available on: Add Contact webforms.

On Add Contacts webforms, you can choose to create a tracking cookie for contacts added using an Add Contacts webform.

Tip: The tracking cookie is used to identify a contact for the purpose of associating actions with them, such as placing orders and using direct update.

To create a tracking cookie for contacts added using an Add Contacts webform:

1. Create a new, or edit an existing, webform.
2. Click Form Settings on the top right of the page.
3. Click the Create Tracking Cookie checkbox.
4. Click Done.

Send Email After A Contact Uses Add Contacts Webform

Note: Available on: Add Contact webforms.

On Add Contacts webforms, you can choose to send a welcome email message to contacts who use the webform.

A contact on the suppression list cannot be added to your account until the email address is removed from the suppression list. If a contact who is on the suppression list attempts to sign-up to receive email messages from you via an Add Contacts webform or via Direct Add, they will not be added as a contact in your account.

For more information on using the suppression list, see Suppression Lists on page 1403.

To send a welcome email message after a contact uses an Add Contacts webform:

1. Create a new, or edit an existing, webform.
2. Click Form Settings on the top right of the page.
3. From the Welcome Message Behavior pull-down menu, choose if you want to send or not send the contact a welcome email message. You have three options:
   • Do not send a welcome message
   • Send a welcome message to new contacts
   • Send a message to anyone who uses this form
4. Optional: If you choose to send contacts a message
   a) Choose the message that will be sent.
      Note: If you chose to add contacts with a status of unconfirmed, the message you choose to send will need to have been approved for transactional sending. For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.
      For more information on adding contacts with a status of unconfirmed, see Choose The Status Of Contacts Added Via An Add Contacts Webform on page 236.
   b) Specify a from name in the From Name text box.
   c) Specify a from address in the From Address text box.
5. Click Done.

Set Up Where A Contact Is Taken After A Webform Is Submitted
The Webform Submission Settings let you specify where a contact is taken after they submit a webform. You can choose to send them to a Thank-You webform you have created in your account, or choose to send them to another URL.

To specify where a contact is taken after a webform is submitted:

1. Create a new, or edit an existing, webform.
2. Click Form Settings on the top right of the page.
3. Go to the Webforms Settings section. From here, you have two options:
   • Click the Send them to this Thank You page radio button to send contacts to a Thank You page once they submit the webform. Use the drop-down menu to pick which Thank You webform you want to send them to.
   • Click the Send them to the following URL radio button to send the contacts to a page of your choosing. Add the URL to the text box.
4. Click Done.

Set Up Messages Shown To Contacts When A Webform Is Submitted

In the Messages To User section, you can specify content shown to contacts if a webform is successfully submitted, cancelled, or if an error occurs. If you specified a Thank-You page to be displayed when a webform is successfully submitted, then that will be used as the success message.

Tip: Depending on the Thank You page you choose in the Webform Submission Settings section, the content you add to the Success Message text box may or may not appear when the contact successfully submits the webform. If the Thank You page you select contains the %%!success%% special tag, the content added in the Success Message text box will be shown. For information on how to use the %%!success%% special tag with webforms, see Display The Success Message When Content Added To Webforms on page 240.
Note: The error message you add to the **Error Message** text box will always be shown in the event of an error, even if you use chose **Send them to the following URL** in the **Webform Submission Settings**.

Note: Available on: All webforms.

To setup messages shown after a webform is submitted:

1. Create a new, or edit an existing, webform.
2. Click **Form Settings** on the top right of the page.
3. Go to the **Message To User** section. From here, you can add three types of messages:
   - Success Message - If no Thank You page has been chosen to be displayed, this message will appear if the webform has been successfully submitted.
   - Cancel Message - If a contact cancels the submission of a webform, this message will be displayed.
   - Error Message - If an error occurs with the submission of a webform, this message will be displayed.
4. Click **Done**.

**Display The Success Message When Content Added To Webforms**

When a contact submits a webform, you can choose to send them to a Thank You page. For each webform submitted, you can customize the message shown on the Thank You page.

**Tip:** For more information on special tags, see **Special Tags** on page 152.

**Note:** Available on: All webforms.

1. Create a new, or edit an existing, webform.
2. Click **Form Settings** on the top right of the page.
3. From the **Webform Submission Settings** section, click the **Send them to this Thank You page** radio button.
4. From the **Send them to this Thank You page** pull-down menu, choose the Thank You webform you want to send contacts to after they submit the webform.
5. In the **Messages To User** section, you will see a text box called **Success Message**.

   In this text box, add the content you want to display on the Thank You page you choose in the previous step.
6. Click Done.

7. Go to Content > Webforms.

8. Click Thank-You.

9. Click on the name of the Thank You webform you chose in step 4.

10. Move your mouse over the main content area until the gray box appears.

11. Click Edit.
    The WYSIWYG Editor will appear.

12. Add the %%!success%% special tag in the location where you want the success message content to appear.

13. Click Done.

After a contact submits the webform, they will be taken to the Thank You webform you choose in step 4. The %%!success%% tag will be replaced by the content you added in Step 5.

**Choose A Default SMS Keyword To Subscribe A Contact To Upon Webform Submission**

The SMS Settings section, located in Form Settings, allows you to determine which SMS keyword a contact is subscribed to when they submit a webform. This setting is only available for Add Contact and Manage Preferences webforms.

You must include a Mobile Phone Number special purpose content block on a webform to use the SMS Setting. For more information see Capture Mobile Numbers From A Webform on page 219.
Important: If you have not included a Mobile Phone Number special purpose content block on the webform, you will not be able to save the webform changes when you selected an SMS Keyword from the SMS settings.

You can also allow contacts to choose which keywords they want to subscribe to by adding the SMS Subscription Keywords Content Block to the webform. Contacts will still be subscribed to the default keyword you select here whether or not they choose to subscribe to any keywords via the SMS Subscription Keywords Content Block. For more information on adding the SMS Subscription Keywords Content Block to a webform, see Add The SMS Subscription Keywords Content Block To A Webform on page 228.

For more information on creating SMS subscription keywords, see Create SMS Keywords on page 261. For more information on setting up the SMS integration see, SMS Integration Settings on page 1279.

To setup the SMS Settings on an Add Contact webform:

1. Create a new, or edit an existing, webform.
2. Add the Mobile Phone Number special purpose content block to the webform.
   You must include a Mobile Phone Number special purpose content block on a webform to use the SMS Setting. For more information see Capture Mobile Numbers From A Webform on page 219.
3. Click Form Settings on the top right of the page.
4. From the SMS Settings section, choose an SMS keyword from the SMS Keyword pull-down menu.
5. Click Done.

Related Topics
SMS Integration Settings on page 1279
The SMS integration allows you to view the SMS short code for your account and to view and configure the STOP and HELP responses your contacts will receive.

Edit The CSS Used In Webforms
You can customize the CSS used in a webform by clicking the Styles button and modifying the Default CSS shown. This is a powerful tool you can use to create webforms that best represent your business or organization.

You can edit the default CSS used in webforms to add your own personal design to your webforms.

Tip: When you first view the styles for a webform, the default CSS will be displayed. You can use the default styles to gain an understanding of how the styles are structured and then begin making your own changes.

To edit the CSS used in webforms

1. Create a new, or edit an existing, webform.
2. Click Styles .
   A window will appear containing the CSS for the webform in its current state.
3. Click the Use the custom stylesheet below checkbox to begin making edits to the CSS.
   When you click this checkbox, a message is displayed at the bottom of the window with a link that allows you to return the stylesheet to its default state.
4. Make any changes to the CSS.
5. Click Preview Changes to preview your changes.
If you want to return the stylesheet to its default state, click the link that appeared at the bottom of the window when you clicked the **Use the custom stylesheet below** checkbox.

6. Click **Done** when you are finished.

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### Preview A Webform

You can preview a webform to see what it will look like to your contacts.

You can preview a webform by clicking on the pencil icon on the **All Webforms** page.

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### Legacy Webforms

Introduction to legacy webforms.

Legacy Webforms are the original Bronto webforms and this section of documentation only applies to you if you still use them.

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#### Legacy Webforms: Choose a Type

**Important:** Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

The first thing you need to do when creating a webform is choose the type.

To choose the type:

1. Go to **Content > Webforms**.
2. Click the Create **New Webform** link on the top right of the page.
3. Give the webform a name in the **Webform Name** text box.
4. Choose the type of webform you want to create from the **Webform Type** pull-down.
5. Click **Create**.

**Legacy Webforms: Build**

> **Important:** Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

Once you have chosen the type of webform you want to create, you can begin building that webform by adding Form Pieces, HTML, or Text to the content blocks that make up the webform. Content blocks are the individual sections that comprise a webform. You can adjust the CSS and Layout used in the webform and individual content blocks. Depending on the type of webform you choose to create, certain content blocks will already be populated with Form Pieces, HTML, or text. If you want to add lists or fields to your webform, then you will need to use Form Pieces. Form Pieces are literally "pieces of a webform" containing lists and fields that are added to the content blocks used to build a webform. To begin editing a content block, click the Edit link in the top left corner of a content block.

> **Tip:** You can use the handle \[\] to move content blocks to different locations on a webform.

**Legacy Webforms: Choose A Layout**

> **Important:** Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

To choose a layout for your webform:
1. Go to the **Edit Webform** page by editing an existing webform or by creating a new webform.
2. On the **Content Layout** tab, choose the type of layout you want for your webform. You can choose between:
   - No Split Rows
   - 1 Split Row
   - 2 Split Rows
   - 3 Split Rows

**Legacy Webforms: Edit HTML Or Text Using The WYSIWYG Editor**

> **Important:** Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

To edit HTML or text on a webform using the WYSIWYG editor:
1. Click on the **Edit** link on a content block.
2. A pop-up window will appear that contains the WYSIWYG editor.
3. Use the WYSIWYG editor to add text, images, or links to the content block.
4. Click **Save Changes**.

**Legacy Webforms: Create A Form Piece**

> **Important:** Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

Create a Form Piece provides a simple way to find out information about your contacts and their preferences.
Tip: You can use the handle to move content blocks to different locations on a Form Piece.

To create a Form Piece:

1. Go to Content > Webforms.
2. Click the Form Pieces link.
3. Click Create New Form Piece.
4. Give the Form Piece a name and title.
   - The Form Piece name is used to internally identify a Form Piece and can only be seen by users in your account. The Form Piece title is an external designation for the Form Piece. The Form Piece title is displayed at the top of the Form Piece and will be seen by your contacts.
5. Choose the type of Form Piece you want to create from the Form Type pull-down. You can choose between:
   - Field Form - The Field Form Piece type is used to collect information from your contacts by having them fill in the information that corresponds to fields you have created in your account.
   - List Form - The List Form Piece type is used to provide a way for your contacts to select which of your lists they want to receive mail from.
6. You can
   - Edit the Form title by entering a new title in the Form title text box, and then clicking Update Title.
   - Edit the Submit button text by entering in the new button text in the Edit Submit Button Text text box, and then clicking Update Button Text.
   - Use the handle to drag the content block to a different location on the Form Piece to edit the contents of the email address text box and message preference checkbox.

By default, the Field Form Piece consists of a title, email address text box, message preference checkbox, and submit button. By default, the List Form Piece type contains a title, and submit button that can be edited in the same way as the title and submit button that appear on a Field Form Piece.

7. Additionally, you can add field items, list checkboxes, and text areas to both Form Piece types using the Fields, Lists, and Texts tabs.
   - Fields - Add fields to a Form Piece allows you to collect information from you contacts that will be used to populate fields in your account. The title and type of item that appears on a Form Piece when you add a field depends on the type and label you set for the field when you created it. For example, let's say you have created a field with a name of firstname, a label of First Name, and a type of "Text". If you add that field to a Form Piece, a text box will appear with a title of First Name. To add a field to a form, select the field you want to add, and then click Add Field to Form. If you click the Required? checkbox, then your contacts will be required to fill out that field in order to complete the webform. Required fields have a red asterisk next to them.
• Lists - Add lists to a Form Piece will add a checkbox that will allow your contacts to easily choose if they want to receive emails that you send to that particular list. To add a list checkbox to a Form Piece, select the list you want to add, choose the type of list, and then click Add List to Form. What are the types of lists I can add to a Form Piece? There are four types of lists you can add to the Form Piece. They are described below:

• Unchecked (subscribe) - The Unchecked (subscribe) List type will add the name of the list(s) along with a corresponding unchecked checkbox to the Form Piece. This allows your contacts to opt-in to your lists that they want to receive mail from.

• Pre-checked (unsubscribe) List- The Pre-checked (unsubscribe) List type will add the name of the list(s) along with a corresponding checked checkbox to the Form Piece. This option requires contacts to uncheck the checkbox (aka opt-out) if they do not want to receive messages from your lists. Email marketing best practices suggest that it is almost always better to allow your contacts to subscribe (unchecked) rather than unsubscribe (checked).

• Only Show if Contact on List - The Only Show if Contact on List type will only shows those lists that the contact has already agreed to receive mail from. Each list will have a corresponding checkbox that is checked by default.

• Automatically Add Contact to List - The Automatically Add Contact to List type will automatically add the contact who submits the webform to any lists shown on that webform. We recommend that you use this type for internal correspondence, like company newsletters, to help stay in line with best practices. You could also use this List type if the webform you are creating only has one list to sign-up for. However, you need to be sure to make it very clear that by submitting the webform, they are signing up for a particular list.

• Text - You can add additional lines of text to your Form Piece by clicking on the Text tab, typing in the text you want to add in the text box, and then clicking Add Description Text to Form.

8. Click Save Form Piece to finish.

Legacy Webform: Add A Form Piece

Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

To add a Form Piece to a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Click the Edit link on a content block that does not already contain a Form Piece.
3. Click the Form Piece checkbox in the pop-up window.
4. Choose the Form Piece you want to add from the Choose Form Piece pull-down.
5. If you want to make edits to the Form Piece you are going to add, click the Edit This Form Piece link.
6. Click Save Changes.

Legacy Webforms: Manage Form Pieces

Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

The Form Pieces page contains a list of all the Form Pieces you have created in your account. You can use the search box to search for a specific Form Piece, or use the Show rows pull-down to sort the number of rows displayed on the table.

Search Form Pieces:  

To view an individual Form Piece, click on the name of the Form Piece you wish to view. From here, you can begin editing that particular Form Piece.
Legacy Webforms: Edit An Existing Form Piece

Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

For more information on editing a Form Piece, see the Managing and Create Form Pieces help topic linked to at the bottom of this page.

To edit an existing Form Piece on a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Click the Edit link on a content block that already contains a Form Piece.
3. A pop-up window will appear. The name of the Form Piece you selected will appear in the Choose Form Piece pull-down. Click the Edit This Form link to edit the Form Piece.
4. You will be taken to the Edit Form Piece page for that Form Piece. From here, you can make changes to the Form Piece.

Legacy Webforms: Remove An Item From A Form Piece

Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

To remove an item from a Form Piece:

For any item that you have added to a Form Piece, you can click the Remove link to remove that item. Items marked Locked can not be removed from a Form Piece.

Legacy Webforms: Customize The Default CSS

Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

To customize the default CSS on a webform:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Click the CSS Layout button to edit the existing CSS, or add your own CSS. The Style Properties and CSS pop-up window will appear.
3. You can now change any of the default CSS properties, link to an external CSS file, or paste in your own CSS. Each of the default CSS parameters are described below:
   - Webform Name - You can use the Webform Name text box to change the name of the webform.
   - Background Image URL - In the Background Image URL text box, you can add a URL that points to the image you want to use as the background for your webform.
   - Image Repeat - The Image Repeat pull-down lets you choose if and how the background image will repeat.
• Image Position - The Image Position pull-down lets you choose the position of the background image.
• Background Color - The Background Color text box lets you pick the color of the background used in your webform.
• Font Family - The Font Family pull-down lets you pick the font that will be used on the webform.
• Text Align - The Text Align pull-down lets you set how the text will be aligned on the webform.
• Top Padding - The Top Padding pull-down lets you pick the amount padding or space (in pixels) that will appear between the start of the webform and the edge of the browser window.
• Bottom Padding - The Bottom Padding pull-down lets you pick the amount padding or space (in pixels) that will appear between the bottom of the webform and the edge of the browser window.
• Right Padding - The Right Padding pull-down lets you pick the amount padding or space (in pixels) that will appear between the right side of the webform and the edge of the browser window.
• Left Padding - The Left Padding pull-down lets you pick the amount padding or space (in pixels) that will appear between the left side of the webform and the edge of the browser window.

4. Click Save Style Changes when you are done.

**Legacy Webforms: Add Custom CSS**

**Important:** Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

You can leverage CSS to customize the "look and feel" of your webforms to maintain consistency on your website. CSS can be some complicated stuff, beyond the purview of a simple help document. However, if you have experience with web design, you can customize the style of your webform by pasting CSS code into the CSS style box. If you are going to write your own CSS for a webform, then you will need to pay attention to the class attribute values displayed in the top right corner of each content block.

```css
div.content_one {
  font-size: 9pt;
  font-family: arial;
}

div.content_two {
  text-align: center;
}

div.content_three {
  margin: 15px auto;
  width: 500px;
  text-align: center;
}

div.content_four {
  font-size: 18pt;
  font-weight: bold;
}

div.content_six {
  margin: 10px 10px;
}
```

**Tip:** You can use custom CSS to override the default CSS settings for the whole page, or for specific content blocks. In the top right corner of each content block are class attribute values that you can use to style each content block used in a webform.

**Legacy Webforms: Customize Settings**
Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

Customizing the settings for a webform allows you to modify the internal notifications, page submission settings, associated welcome messages, and/or subscription confirmation messages belonging to the webform. The process for changing webform settings and each setting that you can change is described below.

To customize webform settings:

1. Go to the Edit Webform page by editing an existing webform or by creating a new webform.
2. Click the Form Setting button. The Form Settings pop-up window will appear.
3. From here, you can change webform settings, internal notifications, page submissions settings, welcome messages, and subscription confirmation messages.
   - Webform Settings (All Webform types) - In the Form Settings section, you can choose to make the webform you are currently viewing the default for that particular type of webform. For example, if you are viewing a Manage Preferences webform, you can click this checkbox, and then that webform will become the default Manage Preferences webform. You can also choose to use legacy div IDs for CSS Compatibility.
   - Internal Notifications (Only available for Add Contacts, Manage Preferences, Unsubscribe, Forward to a Friend, and Lookup Contacts) - In the Internal Notifications section, you can choose to send an email to specified addresses when the webform is used. You can also choose to have the data collected from the webform included in the email. To specify email addresses to be notified when the webform is used, add the email addresses in the Notify these email addresses text box. Separate each email address by a comma.
   - Page Submissions Settings (Only available for Add Contacts, Manage Preferences, and Unsubscribe) - The Page Submission Settings let you adjust the responses that are displayed when a contact succeeds or fails to submit an Add Contacts, Unsubscribe, or Manage Preferences webform. The text that you enter in the box used for successfully submitted forms will be used to populate the locked content block on your default Thank-You webform. Your default Thank-You webform will automatically be displayed when an Add Contacts, Unsubscribe, or Manage Preferences webform is successfully submitted. You can also choose to direct them to a URL of your choosing when they submit the webform.
   - Welcome Messages and Subscription Confirmation (Only available for Add Contacts) - The Welcome Messages and Subscription Confirmation settings let you send a welcome message and/or display a subscription confirmation page when an Add-Contacts webform is successfully submitted. If you choose the Yes radio button, then a welcome message will be sent to contacts who successfully submit the Add-Contact webform. You will need to choose the welcome message you want to send from the pull-down box that appears, as well as specify a from name and address for the welcome message. If you choose the Yes, and require a subscription confirmation radio button, you will need to specify a welcome message to be sent. Additionally, your default Subscription Confirmation webform will be displayed when the Add Contacts webform is successfully submitted. If you click the No radio button, then no welcome message will be sent and your Subscription Confirmation webform will not be displayed.
   - Forward to a Friend Note (Only available for Forward to a Friend) - This setting allows you to include a note that is sent to the recipient when the Forward to a Friend webform is submitted. In this note, you can include the %! from name% tag, which will add the name of the recipient to the note, and/or the %! from address% tag, which will add the senders email address.
4. Click Save Settings.

Legacy Webforms: Link To Add Contacts And Look Up Contacts

Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.

When creating an Add Contacts or Look up Contacts webform, choose to preview the webform in a new window to access the URL. Copy the URL in the address bar and use it to link your website to the webform.

Legacy Webforms: Embed In Your Site

Important: Only use this documentation if you know you still use Legacy webforms. The majority of Bronto application users do not.
To embed an Add Contacts or Look up Contacts webform on your site, click the Advanced Form Usage tab. Copy and paste the HTML code provided in the Embed Your Webform section directly into your webpage. All settings and IDs for your account are pre-configured in the HTML code, so you don't need to make any adjustments. This feature is only available for Add Contacts and Look up Contacts webforms.

Create Twitter

Create a Twitter message allows you to create messages (aka tweets) in the application that can then be posted to Twitter accounts you have integrated with.

To create a Twitter message:

1. Go to Messages > Messages.
2. Click Create New Message.
3. Click Create Twitter Message.
4. Give your Twitter message a name in the Message Name text box.
   The Twitter message name is the unique identifier for the Twitter message. Think of it as the name of a document. You should name the Twitter message something relevant to it's purpose.
5. Add the content for the Twitter message in the Body text box.
   Twitter messages (aka tweets) are limited to 140 characters. The number of characters currently used in the Twitter message is displayed below the Body text box.
   
   Note:
   Any time an SMS call-to-action is used (e.g. Text Helptest to 33233 to receive a coupon), you must clearly display the following terms of service/conditions text:

   
   Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms

   This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.
6. Optional: Click the Shorten and track URLs checkbox to shorten long URLs and allow the application to track the URLs used in the Twitter message.
   In addition to shortening URLs, which allows for more content, this setting also allows the application to track the URLs used in a Twitter message, thus allowing you to more effectively monitor the effectiveness of a Twitter message.
   For more information on viewing shortened URLs and their associated metrics, see View The Shortened URLs Used In Your Message on page 981 and Detailed Click Metrics For A Shortened URL.
7. Optional: In the Message Organization section, you can choose to add the Twitter message to a folder.
8. Click Save.

Related Topics
Post Twitter on page 337

Edit A Twitter Message

You can edit a Twitter message from the from the Twitter Messages Overview page, by clicking Edit in the top right of the page.
If you forget to save a message or your computer crashes, you will still be able to access the version of the message you were working on. The **Drafts** folder is automatically created for you.

### Delete A Twitter Message

If you want to delete a Twitter message, click **Delete** in the top right of the **Twitter Message Overview** page.

### Create A Facebook Message

Create a Facebook message allows you to create messages in the application that can then be posted to Facebook accounts you have integrated with.

To create a Facebook message:

1. Go to **Messages > Messages**.
2. Click **Create New Message**.
3. Click **Create Facebook Message**.
4. Give your Facebook message a name in the **Message Name** text box.
   
   **Note:** The Facebook message name is the unique identifier for the Facebook message. Think of it as the name of a document. You should name the Facebook message something relevant to its purpose.
5. Optional: Click the **Shorten and track URLs** checkbox to shorten long URLs and allow the application to track the URLs used in the Facebook message.
   
   **Note:** In addition to shortening URLs, which allows for more content, this setting also allows the application to track the URLs used in a Facebook message, thus allowing you to more effectively monitor the effectiveness of a Facebook message.

   **Tip:** For more information on viewing shortened URLs and their associated metrics, see **View The Shortened URLs Used In Your Message** on page 981 and **Detailed Click Metrics For A Shortened URL**.
6. Add the content for the Facebook message in the **Body** text box.
   
   **Note:** Facebook messages are limited to 1,000 characters. The number of characters currently used in the Facebook message is displayed below the **Body** text box.
7. Choose the message type from the **Message Type** pull-down menu. You can choose the following message types:
• **Status** - The status option lets you post a status update to Facebook. The status will contain the content you added in the **Body** text box above.

8. Optional: In the **Message Organization** section, you can choose to add the Facebook message to a folder using the **Message Folder** pull-down menu.

9. Click **Save**.

**Related Topics**
Post Facebook on page 339

**Related Topics**
Set Up Your Account So You Can Post To Facebook on page 1287

Integrating your account with a Facebook account allows you to post messages to Facebook.

**Edit A Facebook Message**

You can edit a Facebook message from the **Facebook Messages Overview** page, by clicking **Edit Message**.

**Note:**

If you forget to save a message or your computer crashes, you will still be able to access the version of the message you were working on. The **Drafts** folder is automatically created for you.
Delete A Facebook Message

If you want to delete a Facebook message, click **Delete** in the top right corner of the Facebook Message Overview page.

Create An SMS or MMS Message

If you have purchased SMS messaging, you can create SMS messages from the Messages > Messages page.

An SMS message has a 160 character limit unless it contains one or more non-GSM characters. SMS messages with non-GSM characters are limited to 70 characters. If you create an SMS message that exceeds the character limit then it will be split into multiple SMS messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

**Note:** GSM is the approved character set used in SMS messaging.

You can include multimedia content in your SMS using the Media URL, which will make the message an MMS message. The link you provide must be a valid link to one of the following:

- images: jpeg, gif, and png are fully supported and bmps are accepted but will not be reformatted for device compatibility
- audio: mp4, basic, L24, mpeg, ogg, vorbis, vnd.m-realaudio, vnd.wave, 3gpp, 3gpp2, ac3, vnd.wave, webm, amr-nb, and amr are accepted but will not be reformatted for device compatibility
- video: mpeg, mp4, quicktime, webm, 3gpp, 3gpp2, 3gpp-tt, H261, H263, H263-1998, H263-2000, and H264 are accepted but will not be reformatted for device compatibility

Also, the file must be less than 5 MB.

You can click the Show Preview button in the SMS editor to preview the SMS message as you create it. If an SMS message is split into multiple messages due to it exceeding the 160 character limit, you can use Show Preview to preview each message.

To create an SMS message:

1. Go to Messages > Messages.
2. Click Create New Message.
3. Click Create SMS Message.
4. Specify a name for the SMS message in the Message Name text box.
The SMS message name is the unique identifier for the SMS message but it is not seen by contacts.

5. Optional: Click the **Shorten and track URLs** checkbox to shorten long URLs and allow the application to track the URLs used in the SMS message.

In addition to shortening URLs, which allows for more content, this setting allows the application to track the URLs used in an SMS message. Tracking URLs allows you to more effectively monitor the effectiveness of an SMS message. URLs will be shortened when the SMS message is sent. The character count takes this into account, and thus represents the count for your SMS message as if the URLs were shortened.

For more information on viewing shortened URLs and their associated metrics, see View The Shortened URLs Used In Your Message on page 981 and Detailed Click Metrics For A Shortened URL.

6. Add the content for the SMS message in the **Message Content** text box.

   **Text STOP to end** must be included in the body of your SMS message. As you add content, the number of characters currently used in the SMS message is displayed below the **Message Content** text box.

   **Note:** SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

7. Optional: If you want to send an MMS, include a link to an image in the **Media URL**.

   The link you provide must be a valid link to an image, audio, or video file that is less than 5 MB. You can use any valid link, but we cannot guarantee the permanence of any content stored outside of Bronto. To include a link to media in Bronto:

   a) Click the folder icon located in the **Media URL** box.
   b) Navigate to the media you want to include and click on it.
   c) Click **Insert**.

8. Optional: Click **Dynamic Content** to add dynamic content to the body of an SMS message.

   Dynamic content is an advanced feature that allows you to add content to messages based on whether or not certain conditions are met.

   For more information on using Dynamic Content in SMS messages, see Add Dynamic Content To SMS or MMS Messages on page 189.

   You can also add Dynamic Code to an SMS message. For more information on Dynamic Code, see Dynamic Code on page 190.

9. Optional: Click the **Insert Special Tags** and **Insert Field Tags** pull-down menus to insert special tags and field tags in to the body of an SMS message.

   - **Special tags** represent the default tags that we provide in your account. When an email or SMS message is sent, special tags are replaced with data from your account.
   - **Field tags** use the contact data stored in Bronto contacts fields to populate email and SMS message content. At message send time Bronto looks up the value stored for the contact field for and replaces the field tag with the saved data specific to a contact.

   When using field tags and special tags in SMS messages, be cognizant of the 160 character limit. If the content which replaces the tag causes the message to exceed the 160 character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

   For more information on all of the Special Tags available in your account, see Special Tags on page 152.

10. Optional: Add product tags to your message by hard coding them into the message content.

    The proper syntax for a product tag is `%%$product.placeholder.field%%`. For more information see Product Tags on page 170. If you want to use a product tag to display an image in your message, you have to...
use the product tag in the Media URL. Product tags that represent textual information, such as a product name or description, can be used in the body of a message.

If you use product tags, map your product placeholders either globally in the message or when scheduling the SMS:

- To map the placeholder globally: Click Set Product Defaults, find the placeholder you want to map and enter the Product ID you want to map the placeholder to in the Default Product ID box. This will cause the placeholders to always be mapped to the same products when this SMS is sent, unless you map it differently when scheduling the message.
- To map the placeholder when you schedule the message see Schedule A Delivery Of An SMS or MMS Message on page 335.

11. Optional: If you are going to send the message via the API, you can add API message tags to the body of the message.

For more information on using API message tags in SMS messages, see Add Content To An SMS Message With API Message Tags on page 169.

12. Optional: In the Message Organization section, select a folder to add the SMS message to using the Message Folder list.

13. Click Save.

Edit An SMS or MMS Message

You can edit any SMS or MMS message. Editing a message will only affect the content of future deliveries of a message.

If you forget to save a message or your computer crashes, you will still be able to access the version of the message you were working on. The Drafts folder is automatically created for you.

To edit an SMS or MMS message:

1. Go to Messages > Messages.
2. Click SMS.
3. Click on the name of the SMS or MMS message you want to edit.
4. Click Edit Message.

As you edit the SMS or MMS, make sure you remember to include Text STOP to end in the body of the message. For more information about what you can do when you edit an SMS, see the Create An SMS or MMS Message on page 253 help topic.

Delete An SMS Message
You cannot delete SMS messages if they are being used in an active workflow.

To delete an SMS message:

1. Go to Messages > Messages.
2. Click SMS.
3. Click the checkbox for the SMS message you want to delete.
4. Click the Delete button. The confirmation window is displayed.
   
   Note: If the SMS is being used in a workflow, you will see a message that the SMS message cannot be deleted instead.
5. Click Delete.

If you want to delete an SMS that is related to active workflows, you can remove the SMS message from the workflows and then try to delete the SMS message again.

Text-To-Join

Text-To-Join allows you to grow your email-marketing list by providing a way for potential contacts to text their email address to a short code and be automatically added to one of your lists.

Note: Text-to-Join is only available in the US, UK, and Canada.

Text-To-Join keywords are separate from SMS Keywords. You are not required to have SMS messaging set up in order to use Text-To-Join. Creating a Text-To-Join keyword will not count against your SMS keyword allocation. When a contact signs up for a list using Text-To-Join, they have opted-into receiving email communication. They have not opted into receiving future SMS messages.

Note: You can have a maximum of 1 active keyword and 1 deleted keyword at a time.

Tip: You can use the Contact is Added Trigger Node in workflows to send an email to a contact when they text their email address to a Text-To-Join keyword. For more information on using the Contact is Added Trigger Node in workflows, see Use The Contact Is Added Trigger Node In Workflows on page 358

Create Or Edit A Text-To-Join Keyword

Once a Text-To-Join keyword has been defined, any person who sends a text message to the short code with the defined keyword and an email address will automatically be added to the specified list(s). The contact will be added to your account and given a status of Onboarding.

Note: You can have a maximum of 1 active keyword and 1 deleted keyword at a time.

To create a Text-To-Join keyword:

1. Go to Apps > Texter > Text-To-Join.
2. Click Create Keyword or Edit Keyword.
3. Add a name for the Text-To-Join keyword in the Name text box.
   
   The Text-To-Join keyword name must be 3-16 characters and can only contain letters and numbers. Use a keyword name that is easily associated with your company, such as your company name or Twitter handle.
   
   Warning: The Text-To-Join keyword name is not editable once saved.
4. Optional: In the Response Message text box, you can modify the default Response Message.
   
   The Response Message will be sent each time a contact texts in to the keyword without their email address. The Response Message is limited to 160 characters. If the Response Message contains one or more non-GSM characters, the message is limited to 70 characters.
5. Use the list picker in the Choose List(s) section to select the list(s) a person will be added to when they send a text to the short code containing their email address and the keyword defined in step 3.
6. Click Save.

Note: Any person who sends a text message to the short code containing the keyword you created and an email address will automatically be added to the specified list(s) and given a contact status of Onboarding.

If a contact with an inactive status (Unsubscribed, Bounce, or Unconfirmed) texts in their email address, their status will be changed to Onboarding. For more information on the different types of contact status, see Contact Status on page 1083.

Related Topics
Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Delete A Text-To-Join Keyword
Deleting a Text-To-Join keyword allows you to remove an unwanted Text-To-Join keyword and make room for a new keyword.

Note: When a keyword is deleted, it will remain in the Deleted Keyword table for 7 days, unless you click Delete Immediately.

To delete a Text-To-Join keyword:
1. Go to Apps > Texter > Text-To-Join.
2. Click Delete Keyword.
3. Click the checkbox next to the name of the Text-To-Join keyword you want to delete.
4. Click Delete.

Restore A Text-To-Join Keyword
Restoring, or undeleting a Text-To-Join keyword allows you to take a keyword that appears in the Deleted Keyword table and make it active again.

Note: When a keyword is deleted, it will remain in the Deleted Keyword table for 7 days, unless you click Delete Immediately.

To undelete a Text-To-Join keyword:
1. Go to Apps > Texter > Text-To-Join.
2. In the Deleted Keywords table, click the checkbox next to the name of the keyword you want to undelete.
3. Click Undelete.

View Your Text-To-Join Keyword Activity
You can view performance metrics over time for each Text-To-Join keyword created in your account. To view performance over time metrics for Text-To-Join keywords, go to Apps > Texter > Text-To-Join.
On this page you can view the following metrics and data:

In the **Active Keyword** section you can view:

- The short code the current active Text-To-Join keyword is on.
- The name of the current active Text-To-Join keyword.
- The number of lists contacts will be added to when they text in to the Text-To-Join keyword.
- The date the Text-To-Join was created.

In the **Activity Since Creation** section, you can view:

- The number of people who texted in to the Text-To-Join keyword but did not provide an email address.
- The number of people who texted in an invalid email address to the Text-To-Join keyword.
- The number of contacts who texted in to the Text-To-Join keyword but already existed in your account.
- The number of new contacts who were added by texting in to the Text-To-Join keyword.
- The total number of texts sent to the Text-To-Join keyword.

Available when viewing All Keywords - In the **All Keywords** section, you can view:

- The short code the Text-To-Join keywords are on.
- The date the first Text-To-Join keyword was created.

Available when viewing All Keywords - In the **Total Keyword Activity** section, you can view:

- The number of people who texted in to one of Text-To-Join keywords but did not provide an email address.
• The number of people who texted in an invalid email address to one of the Text-To-Join keywords.
• The number of contacts who texted in to one of the Text-To-Join keywords but already existed in your account.
• The number of new contacts who were added by texting in to one of the Text-To-Join keywords.
• The total number of texts sent to all of the Text-To-Join keywords.

You can use the pull-down menu below the graph to switch between viewing metrics and data for a specific Text-To-Join keyword, and all Text-To-Join keywords created in your account.

You can use the Months/Days pull-down menu to view Text-To-Join metrics by month or Text-To-Join metrics by day.

You can use the date range pickers to view Text-To-Join metrics for a specific date range.

The table below the graph automatically updates to display metrics based on the Text-To-Join keyword(s) selected and the date range selected.

**SMS Keywords**

The SMS integration allows you to send SMS or MMS messages to your contacts. This opens a new channel through which you can engage your contacts. SMS messages are allocated independently of your regular email allocation. In order to purchase SMS messages, contact your account manager.

**SMS Subscription Keywords**
The **Subscription Keywords** table allows you view all of the SMS subscription keywords you have set up in your account. You can view the **Subscription Keywords** table by going to **Apps > Texter > SMS Keywords**. Each column in this table is described below:

**Tip:** Subscription based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.

**Note:** When a person texts in to a keyword, the keyword must be the first thing contained in the SMS message they are sending to you. Additional content is allowed, but the keyword must be first.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keyword</td>
<td>The name assigned to the keyword.</td>
</tr>
<tr>
<td>SMS Short Code</td>
<td>The short code the SMS keyword is on. An SMS short code is basically a short</td>
</tr>
<tr>
<td></td>
<td>version of a phone number associated with SMS messages you send. It allows</td>
</tr>
<tr>
<td></td>
<td>recipients of an SMS message to identify where the SMS message is from, and</td>
</tr>
<tr>
<td></td>
<td>also allows them to respond (subscribe, unsubscribe, etc.) The default short</td>
</tr>
<tr>
<td></td>
<td>code for US and Canada is 33233 and the default for the UK is 63233. If your</td>
</tr>
<tr>
<td></td>
<td>account does not use a default short code, you can view your short code by</td>
</tr>
<tr>
<td></td>
<td>going to <strong>Home &gt; Settings &gt; SMS Integration</strong>.</td>
</tr>
<tr>
<td>Description</td>
<td>The description is an internal designation you use to describe what the keyword is for.</td>
</tr>
<tr>
<td>Subscribers</td>
<td>The number of contacts currently subscribed to the keyword.</td>
</tr>
<tr>
<td>Frequency Cap (Use)</td>
<td>The frequency cap set for the keyword. The monthly frequency cap setting</td>
</tr>
<tr>
<td></td>
<td>defines the maximum number of SMS deliveries that can be sent to a given</td>
</tr>
<tr>
<td></td>
<td>keyword over a rolling 31 day period. Best practices dictate you should limit</td>
</tr>
<tr>
<td></td>
<td>SMS deliveries to 30 or less per month for a given keyword.</td>
</tr>
</tbody>
</table>

**Note:** It is possible to have a contact subscribed to more than just 1 keyword. Because of this, SMS frequency caps are set up per keyword, rather than per contact.

**Note:** SMS deliveries are not the same as SMS messages. For example, you could have one SMS message that has 20 different deliveries associated with it. Delivery 1 might go to 5k contacts, and delivery 2 might go to 26k contacts, and so on.

| Created           | The date the keyword was created.                                            |

**SMS Basic Keywords**

The **Basic Keywords** table allows you view all of the basic SMS keywords you have set up in your account. You can view the **Basic Keywords** table by going to **Apps > Texter > SMS Keywords**. Each column in this table is described below:

**Tip:** Basic, or non-subscription based keywords are meant for individual transactional interactions. With non-subscription based keywords, a recipient texts in to a keyword and a response is sent back. The
interaction ends there. The recipient is not added to a list because they have not agreed to receive future marketing messages from you.

**Note:** When a person texts in to a keyword, the keyword must be the first thing contained in the SMS message they are sending to you. Additional content is allowed, but the keyword must be first.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keyword</td>
<td>The name assigned to the keyword.</td>
</tr>
<tr>
<td>SMS Short Code</td>
<td>The short code the SMS keyword is on. An SMS short code is basically a short version of a phone number associated with SMS messages you send. It allows recipients of an SMS message to identify where the SMS message is from, and also allows them to respond (subscribe, unsubscribe, etc.) The default short code for US and Canada is 33233 and the default for the UK is 63233. If your account does not use a default short code, you can view your short code by going to Home &gt; Settings &gt; SMS Integration.</td>
</tr>
<tr>
<td>Description</td>
<td>The description is an internal designation you use to describe what the keyword is for.</td>
</tr>
<tr>
<td>Created</td>
<td>The date the keyword was created.</td>
</tr>
</tbody>
</table>

**Create SMS Keywords**

You can create keywords that a contact can subscribe to in order to receive SMS and MMS messages that are tied to the keyword.

SMS keywords are words or names used to distinguish SMS messages on a given short code. Your account will have one short code, but you could have many keywords. This allows you to have keywords for different types of content you want to provide. For example, you could have a keyword for a big sale you are having, and another keyword for mobile updates you provide. There are two types of SMS keywords:

- **Subscription** - Subscription based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.
- **Basic or Non Subscription** - Basic, or non-subscription based keywords, are meant for individual transactional interactions. With non-subscription based keywords, a recipient texts in to a keyword and a response is sent back. The interaction ends there. The recipient is not added to a list because they have not agreed to receive future marketing messages from you.
To create an SMS keyword:

1. Go to **Apps > Texter > SMS Keywords**.
2. Click **Create Keyword**.
3. Type in the name of the keyword you want to create in the **Name** text box.
   The keyword must be 3 - 16 characters in length and can only contain letters and numbers.
   
   **Warning:** The keyword name cannot be edited once it is saved!

4. Add a description for the keyword in the **Description** text box.
   The description is an internal designation you use to describe what the keyword is for.

5. Add the message content for the keyword in the **Message Content** text box.
   The message content is what is sent back to a contact when they text in to a keyword (in other words, they send an SMS to your short code containing this keyword).
   
   **Note:** When a person texts in to a keyword, the keyword must be the first thing contained in the SMS message they are sending to you. Additional content is allowed, but the keyword must be first.

   Contacts manually added by you to a keyword subscription list from within the application will not be sent the message content. They will, however, receive the confirmation message. Contacts who text in to a subscription keyword will receive the message content and the confirmation message.
   
   **Note:** The message content for the keyword can be a maximum of 160 characters.

6. Optional: To make a subscription based keyword:
   a) Click the **Keyword is subscription based** check box to make the keyword subscription based.
      
      Subscription based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.
      
      **Warning:** Once this setting is saved, you can not go back and switch a keyword from subscription based to non-subscription based, and vice versa.
   b) Choose the monthly frequency cap settings for the keyword.
The monthly frequency cap setting defines the maximum number of SMS deliveries that can be sent to a given keyword over a rolling 31 day period. Best practices dictate you should limit SMS deliveries to 30 or less per month for a given keyword.

c) Add a confirmation message in the Confirmation Message text box.

The confirmation message is sent when a contact confirms their subscription to a keyword, either by texting in to the keyword or, by you manually adding them to a keyword subscription list.

Note: We automatically append *Txt STOP to <XXXXX> to end, HELP for info. <XX>msg/mo. Msg&Data rates may apply* to all SMS confirmation messages.

Note: Any time an SMS call-to-action is used (e.g. *Text Helptest to 33233 to receive a coupon*), you must clearly display the following terms of service/conditions text:

```
Message & Data Rates May Apply. Text STOP to end.
Ts&Cs: bronto.com/sms
```

This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

Note: The confirmation message can be a maximum of 83 characters long.

7. Click Save.

Delete An SMS Keyword

You can delete SMS Keywords.

To delete a keyword:

1. Go to Apps > Texter > SMS Keywords.
2. In the Subscription Keywords section, click 📖 in the row associated with a keyword you want to delete.

View Your Deleted SMS Keywords

The Deleted Keywords table allows you to view all of the SMS keywords that have been deleted in your account.

Note: Deleted SMS keywords will remain in the Deleted Keywords table for 7 days.

To view all of the deleted SMS keywords in your account:

1. Go to Apps > Texter > SMS Keywords.
2. Scroll down to the Deleted Keywords section.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keyword</td>
<td>The name assigned to the keyword.</td>
</tr>
<tr>
<td>SMS Short Code</td>
<td>The short code the SMS keyword is on. An SMS short code is basically a short version of a phone number associated with SMS messages you send. It allows recipients of an SMS message to identify where the SMS message is from, and also allows them to respond (subscribe, unsubscribe, etc.) The default short code for US and Canada is 33233 and the default for the UK is 63233. If your account does not use a default short code, you can view your short code by going to Home &gt; Settings &gt; SMS Integration.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Description</td>
<td>The description is an internal designation you use to describe what the keyword is for.</td>
</tr>
<tr>
<td>Subscribers</td>
<td>The number of contacts currently subscribed to the keyword.</td>
</tr>
</tbody>
</table>
| Frequency Cap (Use) | The frequency cap set for the keyword. The monthly frequency cap setting defines the maximum number of SMS deliveries that can be sent to a given keyword over a rolling 31 day period. Best practices dictate you should limit SMS deliveries to 30 or less per month for a given keyword.  

**Note:** It is possible to have a contact subscribed to more than just 1 keyword. Because of this, SMS frequency caps are set up per keyword, rather than per contact.  

**Note:** SMS deliveries are not the same as SMS messages. For example, you could have one SMS message that has 20 different deliveries associated with it. Delivery 1 might go to 5k contacts, and delivery 2 might go to 26k contacts, and so on. |
| Created          | The date the keyword was created.                                           |
| Deleted Date     | The date the keyword was deleted.                                           |

**View The Contacts Subscribed To An SMS Keyword**

The All Contacts page for an SMS keyword contains a table that allows you to view all of the contacts subscribed to a particular SMS keyword. You can use the search box to quickly locate specific contacts subscribed to the keyword or sort the table by metrics and status. You can click on a contact's email address to view more detailed information about them.

⚠️ **Warning:** The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

⚠️ **Note:** GeoIP data is based on the mode (the value that appears most often) of non-mobile IP addresses recorded for a contact. GeoIP data is not stored for mobile clients because it is deemed unreliable.

To view all the contacts subscribed to an SMS keyword:

1. Go to Apps > Texter > SMS Keywords.
2. In the Subscription Keywords section, click 📀 in the row associated with a keyword.

**Default Columns**

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The email address stored for the contact.</td>
<td>An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Status (Email)</td>
<td>The current status of the contact. <em>Tip:</em> For more information on each type of contact status, see Contact Status on page 1083.</td>
<td>This indicates whether or not you can send marketing emails to them, and the level of engagement you have with them.</td>
</tr>
<tr>
<td>Created</td>
<td>The date the contact was created.</td>
<td></td>
</tr>
<tr>
<td>Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
<td>This date lets you keep track of whether or not contacts are still engaged with you.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Message Format (Email)</strong></td>
<td>The email message format preferred by the contact (HTML or Text).</td>
<td>It is important to know which type of email message your contacts prefer to receive, as this can affect the design of your email messages. For example, you wouldn't want to send an email message with a lot of images to a contact who prefers text only emails.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Hidden Columns**

The table below describes columns which are not shown by default.

ℹ️ **Tip:** For more information on showing additional columns, see [Hide or Show Columns In A Table](#) on page 1568.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mobile Number</strong></td>
<td>The mobile number stored for the contact.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on mobile numbers stored in your account. For more information on how to create segments based on mobile numbers, see <a href="#">Create A Segment Based On Contact Mobile Numbers</a> on page 458.</td>
</tr>
<tr>
<td><strong>API ID</strong></td>
<td>The contact's API ID.</td>
<td>This information is useful if you are searching for a specific contact based on their API ID.</td>
</tr>
<tr>
<td><strong>Facebook</strong></td>
<td>Whether or not the contact's Facebook account is connected.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td><strong>Twitter</strong></td>
<td>Whether or not a Twitter handle is stored for the contact.</td>
<td>Storing a person's Twitter handle opens up the possibility for another channel of communication.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
<td>Tip: You can create segments based on the last date a delivery was sent to a contact. For more information, see <code>Create A Segment Based On The Last Date A Delivery Was Sent To A Contact</code> on page 477.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see <code>Hide or Show Columns In A Table</code> on page 1568.</td>
<td></td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
<td>Tip: You can create segments based on the last date a click was recorded for a contact. For more information, see <code>Create A Segment Based On The Last Date A Click Was Recorded For A Contact</code> on page 473.</td>
</tr>
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<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see <code>Hide or Show Columns In A Table</code> on page 1568.</td>
<td></td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
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</tr>
<tr>
<td><em>Last Click Date</em></td>
<td>The last date a click was recorded for the contact.</td>
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<td></td>
<td>Note: This column is hidden by default. For more information on showing and</td>
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<td>hiding columns, see <a href="#">Hide or Show Columns In A Table</a> on page 1568.</td>
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<td></td>
<td>Tip: You can create segments based on the last date an open was recorded for</td>
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<td>a contact. For more information on creating a segment based on the last</td>
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<td>date an open was recorded for a contact, see [Create A Segment Based On The</td>
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<td></td>
<td>Last Date An Open Was Recorded For A Contact](#) on page 475.</td>
<td></td>
</tr>
<tr>
<td><em>Last Unsubscribe Date</em></td>
<td>The last time the contact unsubscribed from receiving marketing emails</td>
<td></td>
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<tr>
<td></td>
<td>from you. If the contact is still unsubscribed, the <strong>Status</strong> column will</td>
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<td></td>
<td>display <strong>Unsubscribed</strong> for that contact.</td>
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<tr>
<td></td>
<td>Tip: You can create a segment based on the last date a contact unsubscribed.</td>
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<td></td>
<td>For more information on creating a segment based on the last date a contact</td>
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<td></td>
<td>unsubscribed, see [Create A Segment Based On The Last Date A Contact</td>
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<td></td>
<td>Unsubscribed](#) on page 455.</td>
<td></td>
</tr>
<tr>
<td><strong>Column Name</strong></td>
<td><strong>Description</strong></td>
<td><strong>Why It's Useful</strong></td>
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<td>-----------------</td>
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</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact. <strong>Tip:</strong> You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td><strong>First Order Date</strong></td>
<td>The date of the first order recorded for the contact.</td>
<td>You can use the first order date to find out when a contact began placing orders with you. <strong>Tip:</strong> You can create segments based on the first order date stored for a contact. For more information on creating a segment based on the first order date recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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</tr>
<tr>
<td>Last Order Date</td>
<td>The date of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order date to find out the last time a contact placed an order with you</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last order date stored for a contact. For more information on creating a segment based on the last order date recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Last Order Total</td>
<td>The total amount of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order total to find out the revenue from the last order placed by the contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last order total stored for a contact. For more information on creating a segment based on the last order total recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The total number of orders recorded for the contact.</td>
<td>You can use the total orders number to find out how many orders a contact has placed with you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the total orders stored for a contact. For more information on creating a segment based on the total orders recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td><strong>Average Order Value</strong></td>
<td>The average order value recorded for the contact.</td>
<td>You can use the average order value metric to find out the average revenue for orders made by a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the average order value stored for a contact. For more information on creating a segment based on the average order value recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td><strong>GeoIP City</strong></td>
<td>The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.</td>
<td>Knowing the city of your contacts allows you to send targeted marketing communications based on City.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see <a href="#">Create A Segment Based On What City Contacts Are Located In</a> on page 479.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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</tr>
<tr>
<td>GeoIP State/Region</td>
<td>The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields.</td>
<td>Knowing the State/Region of your contacts allows you to send targeted marketing communications based on State/Region. <strong>Tip:</strong> You can create segments based on GeoIP State/Region data stored in your account. For more information on how to create segments based on GeoIP State/Region data, see <a href="#">Create A Segment Based On What State Or Region Contacts Are Located In</a> on page 482.</td>
</tr>
<tr>
<td>GeoIP Zip</td>
<td>The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields.</td>
<td>Knowing the Postal/ZIP code of your contacts allows you to send targeted marketing communications based on Postal/ZIP code. <strong>Tip:</strong> You can create segments based on GeoIP Postal/ZIP code data stored in your account. For more information on how to create segments based on GeoIP Postal/ZIP code data, see <a href="#">Create A Segment Based On What Postal/ZIP Code Contacts Are Located In</a> on page 481.</td>
</tr>
<tr>
<td>GeoIP Country</td>
<td>The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields.</td>
<td>Knowing the country of your contacts allows you to send targeted marketing communications based on country. <strong>Tip:</strong> You can create segments based on GeoIP Country data stored in your account. For more information on how to create segments based on GeoIP Country data, see <a href="#">Create A Segment Based On What Country Contacts Are Located In</a> on page 480.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td>-----------------------------</td>
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<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>GeoIP Country Code</td>
<td>The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas.</td>
<td>Knowing the country code of your contacts allows you to send targeted marketing communications based on the country code stored for contacts in your account. Tip: You can create segments based on GeoIP Country Code data stored in your account. For more information on how to create segments based on GeoIP Country Code data, see Create A Segment Based On What Country Code Contacts Are Located In on page 479.</td>
</tr>
<tr>
<td>GeoIP Time Zone</td>
<td>The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.</td>
<td>Knowing the time zone of your contacts allows you to send targeted marketing communications based on the time zone stored for contacts in your account.</td>
</tr>
<tr>
<td>Primary Browser</td>
<td>The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.</td>
<td>Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails. Tip: You can create segments based on the primary browser data stored for contacts in your account. For more information on how to create segments based on primary browser data, see Create A Segment Based On The Browser Used By Contacts on page 487.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Mobile Browser</strong></td>
<td>The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact.</td>
<td>Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser. <strong>Tip:</strong> You can create segments based on the mobile browser data stored for contacts in your account. For more information on how to create segments based on mobile browser data, see <em>Create A Segment Based On The Mobile Browser Used By Contacts</em> on page 488.</td>
</tr>
<tr>
<td><strong>Primary Email Client</strong></td>
<td>The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients.</td>
<td>Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client. <strong>Tip:</strong> You can create segments based on the primary email client data stored for contacts in your account. For more information on how to create segments based on primary email client data, see <em>Create A Segment Based On The Email Client Used By Contacts</em> on page 488.</td>
</tr>
<tr>
<td><strong>Mobile Email Client</strong></td>
<td>The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact.</td>
<td>Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client. <strong>Tip:</strong> You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see <em>Create A Segment Based On The Mobile Email Client Used By Contacts</em> on page 489.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td>---------------------</td>
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<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Operating System</td>
<td>The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.)</td>
<td>Knowing a contact's operating system can allow you to target your messages based the type of operating system a contact is using. <strong>Tip:</strong> You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see Create A Segment Based On The Operating System Used By Contacts on page 486.</td>
</tr>
</tbody>
</table>

**Related Topics**

- **Contact Status** on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

- **Contact Status** on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

- **SMS Segment Criteria** on page 490

- **Create A Segment Based On Contact Mobile Numbers** on page 458

- **Create Segments Based On Contact RFM Metrics** on page 462
The **RFM Metrics** criterion allows you to create segments based on RFM (Recency, Frequency, Monetary) metrics associated with contacts.

**Search For Contacts Subscribed To An SMS Keyword**

When viewing all the contacts subscribed to an SMS keyword, you can use the search box to find specific contacts subscribed to the keyword.

To search contacts subscribed to an SMS keyword:

1. Go to **Apps > Texter > SMS Keywords**.
2. In the **Subscription Keywords** section, click 📌 in the row associated with a keyword.
3. Using the first pull-down menu, select the type of contacts you want to search for. You can select:
   - All Contacts
   - Active Contacts
   - Inactive Contacts
4. Using the second pull-down menu, select how you'd like to optimize your search. You can select:
• **Contains** - This is the best option if you only know part of the mobile number or email address, or if you need to do a group search. For example, you could search for all email addresses that contain `gmail.com`.

• **Exactly** - This is the best option if you need to quickly find a contact and already know what their mobile number or email address is.

• **Starts with** - This is the best option if you know what a contact's mobile number or email address starts with, but aren't sure of the ending. You can also use this option to perform grouped searches (e.g. I want all contacts whose email address starts with `j`).

5. Enter a search term in the text box.
6. Using the third pull-down menu, select how you want to search for contacts.

You can search by **Mobile Number** or **Email**.

7. Click **Search**.

The contacts that match your search criteria are displayed.

---

**Remove A Contact From A Keyword**

When viewing all the contacts subscribed to an SMS keyword, you can click **Remove From Keyword** to remove a single contact, or multiple contacts from the keyword you are viewing.

To remove a contact or contacts from a keyword:

1. Go to **Apps > Texter > SMS Keywords**.
2. In the **Subscription Keywords** section, click `filter` in the row associated with a keyword.
3. Click the checkbox in the row associated with the contact(s) you want to remove from the SMS keyword.
4. Click **Remove From Keyword**.

---

**Export Data For Contacts Subscribed To An SMS Keyword**

When viewing all the contacts subscribed to an SMS keyword, you can use the Export link to export a report containing metrics for all the contacts subscribed to the keyword.

> **Tip:** You can directly import an export report back into the application without having to make any modifications to the export report. For more information on importing a `.CSV` file, see **Contact Imports** on page 1080.

To export a report for contacts subscribed to an SMS keyword:

1. Go to **Apps > Texter > SMS Keywords**.
2. In the **Subscription Keywords** section, click `filter` in the row associated with a keyword.
3. Click **Export**.
4. In the **Choose Filter** section, choose the filter to use for the export. You can choose:
   - All Contacts
   - Active Contacts
   - Inactive Contacts
   - Suppression List

When you select **All Contacts**, only active and inactive contacts are included in the export. Suppression list contacts are not included.

5. In the **Choose Fields** section, select the field data you want included in the report.
6. In the **Choose GeoIP / Technology Data** section, select the GeoIP and technology usage data you want included in the report.

   For more information about GeoIP see **Contact Details Location (GeoIP) Data** on page 920. For more information about Technology Data see **Contact Browser, Email Client, and OS Data** on page 918.

7. In the **Choose RFM Metrics** section, select the RFM metrics you want included in the report.

   For more information about RFM metrics see **Contact Details RFM Metrics** on page 917.
8. Optional: In the **Email Notification** section, add an email address that will be notified when the report is ready for download.

   You are also notified when the report is ready for download via an in-application notification.

9. Click **Export** to begin generating the report.

   All reports will download into a CSV file that you can open in MS Excel.

**Create A New Contact**

When viewing the contacts subscribed to an SMS keyword, you can create a new contact by clicking Create New Contact. For more information on creating contacts, see Create An Individual Contact on page 1101.

**SMS Best Practices**

We've put together some best practices for successful SMS campaigns.

SMS marketing involves the collection of mobile phone numbers, which can then be used for future marketing communications. Mobile numbers are collected when a person opts-in to receiving SMS messages from you by sending an SMS message to a short code which contains a specific keyword. Provided the keyword is subscription based, the user's mobile number be stored in the application and associated with that keyword. You can then create and send future SMS messages to that keyword, which in turn sends the SMS message to each contact subscribed to that keyword.

An SMS short code is basically a short version of a phone number associated with SMS messages you send. It allows recipients of an SMS message to identify where the SMS message is from, and also allows them to respond (subscribe, unsubscribe, etc.)

**Note:** When a person texts in to a keyword, the keyword must be the first thing contained in the SMS message they are sending to you. Additional content is allowed, but the keyword must be first.

**Difference Between Subscription And NonSubscription SMS Keywords:**

- *Subscription Keywords* - Subscription-based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.
- *Basic or Non Subscription Keywords* - Basic, or non-subscription based keywords are meant for individual transactional interactions. With non-subscription based keywords, a recipient texts in to a keyword and a response is sent back. The interaction ends there. The recipient is not added to a list because they have not agreed to receive future marketing messages from you.

**SMS Sign Up Campaigns**

An SMS sign up campaign is any effort made to get your contacts to subscribe to your SMS or MMS messages. Because SMS is a paid-for telecommunications service, there are strict rules that govern what must be included in SMS sign up materials.

In order to be in compliance with the CAN-SPAM Act of 2003, the rules of the Mobile Marketing Association, and Bronto's Permission Marketing Policy you must include the following text in clear font anywhere an SMS sign up is advertised:

- Text **STOP** to 33233 to end, **HELP** for info.

  **Note:** The word **STOP** must be in bold text everywhere it is mentioned, including on the Terms & Conditions pages.

- Message and data rates may apply.
- Max of _____ messages per month.

  **Note:** For subscription keywords, the maximum number of messages per month is 30. This is set when the keyword is initially created and can NOT be changed.
- For more info, visit http://bronto.com/sms

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You must also:

- Always provide a link to a Privacy Policy and Terms & Conditions.

  You should read the industry standards for US Short Code Terms of Service and Privacy policies and be familiar with the CTIA's Short Code Monitoring Handbook.

- Have a separate, unchecked checkbox dedicated to opt-in for SMS any time you provide a web-based sign up form that serves the dual purpose of email and SMS enrollment.

  You should read the industry standards for US Short Code Advertisements and Opt-in forms and review the MMA's Global Code of Conduct and Best Practices Guide.

**When Should I Use Subscription Keywords?**

Subscription keywords should be used when you want to send future SMS messages to a person.

For example, let's say you own a hat store. In the checkout line at your hat store, you have a sign that tells customers to text COOLHATS to 555555 in order to receive updates (via SMS) about upcoming deals on hats. When the customer texts in to the COOLHATS subscription keyword, they will receive a confirmation message letting them know that they are subscribed to the COOLHATS keyword. This confirmation message also contains instructions describing how the user can unsubscribe (per SMS sending guidelines) should they choose to do so. They will also receive a separate message (should you choose to define one). From here on out, you can send SMS messages to anyone subscribed to the COOLHATS keyword.

**What Guidelines/Best Practices Should I Follow When Sending SMS Messages?**

In general, you should follow similar best practices with SMS as you would with sending email.

- Do not send unsolicited SMS messages. Make sure you have a person's permission before sending them marketing SMS messages.

- Do not put false or misleading content in the body of your SMS message.

- Provide a clear and easy way for people to opt-out from receiving SMS messages from you.

  **Note:** We automatically append Txt STOP to <XXXXX> to end, HELP for info. <XX>msg/mo. Msg&Data rates may apply. to all SMS confirmation messages.

  **Note:**

  Any time an SMS call-to-action is used (e.g. Text Helpdesk to 33233 to receive a coupon), you must clearly display the following terms of service/conditions text:

  Message & Data Rates May Apply. Text STOP to end. Ts&Cs: bronto.com/sms

  This includes SMS calls-to-action in emails, tweets, Facebook posts, webforms, webpages, and any form of print communication.

- Do not use borrowed or stolen SMS numbers. If a person didn't provide their mobile number to you, do not send SMS messages to them!

**How Can I Acquire Mobile Phone Numbers?**

The easiest way to acquire mobile phone numbers is to allow new and existing contacts to provide you with their mobile phone number either when they sign up or when they manage their preferences.

You can add the **Mobile Phone Number Special Purpose Content Block** to an **Add Contacts or Manage Preferences Webform** in order to provide an easy way for new and existing contacts to give you their mobile phone numbers.

For more information on adding the Mobile Phone Number Special Purpose Content Block to a webform, see **Capture Mobile Numbers From A Webform** on page 219.
Send Knowledge Base topics cover everything you need to know about scheduling or testing messages.

When it comes time to send a message, you will need to set the parameters that define how, when, from whom, and to whom the message will be sent. An easy way to think of this is you do the scheduling and Bronto does the sending. This is true whether you're sending an email or posting to Twitter. You can test email or SMS messages before you send them and you can use A/B Split Testing when scheduling email messages.

In Bronto, a scheduled or sent message is a delivery. If you want to know more information about scheduling a message, look in the topics related to the type of message you're trying to send. If you want to know more about what to do after a message has been scheduled, look in the delivery topics.

Email

Send Email

When it comes time to send an email message, you will need to set the parameters that define how, when, from whom, and to whom the email message will be sent. The Send Email Message page lets you set all of these parameters and apply some additional advanced options to make email message sending as easy as possible.

Related Topics
Video: Send Emails
Related Topics
Email

Send An Email

1. Go to Messages > Messages
2. Find the message you want to send and click the Send Message icon.

Note: You can also click the message name, click the Regular radio button and then click Schedule.

The Send Message page opens.

3. Specify Sender Options
   - From Name - Also called an alias, this is the name that appears to the recipient of the email message.
   - From Address - The email address that your email message will appear from.
   - Reply-To Address - The address that the application will forward email replies to.
   - Sender Authentication Signs your email message with DomainKeys/DKIM.
   - Reply Tracking Stores a copy of all email replies to your email messages on the Email Replies page.

a) Under Subject, click Edit if you want to change the subject line.

4. Under Select Recipients, choose who you want to send the message to.

You can choose to send a message to specific lists or segments or to your Facebook or Twitter accounts. Click on the Lists, Segments, Twitter, or Facebook tabs to view the options for each. You can also use the search box to search for specific lists or segments by name. The options that you have selected are displayed under the Total Contact Selected area.

5. In the Delivery Scheduling section, choose when to send your message.

   If you wish to send the email message immediately, you can click the Send email message now radio button. If you wish to pick a specific time to send the email message, click the Send at this time radio button.

   You can also Optimize The Sending Time Of An Email Delivery on page 284.
6. Under **Advanced Options**, you can
   - Email Frequency Caps Override on page 286
   - Enable Recurring Emails on page 286
   - Enable Remailing on page 287
   - Auto-Deliver A Report When An Email Delivery Completes on page 288
   - Map Product Placeholders When You Schedule A Message on page 173
   - Add An Email Delivery To A Delivery Group At Send Time on page 289
   - Select Ineligible Recipients For An Email Delivery on page 290

7. Click **Next**.
   A message preview opens.

8. Click **Send Delivery**.

**Specify Sender Options For An Email**
You must specify sender options when you schedule a message.

These options include:
- **From Name** - Also called an alias, this is the name that appears to the recipient of the email message.
- **From Address** - The email address that your email message will appear from.
- **Reply-To Address** - The address that the application will forward email replies to.
- **Sender Authentication** - Signs your email message with DomainKeys/DKIM.
- **Reply Tracking** - Stores a copy of all email replies to your email messages on the Email Replies page.

You can specify these options for every email you schedule or configure default sender options that will be used each time your account sends an email. For more information see **Configure Default Sender Options** on page 1333. When you configure default options, they can be overridden for any individual send by setting different options when you schedule the message.

The **From Name**, **From Email Address**, and **Reply-To Address** text boxes support the use of field tags, special tags, and content tags. For more information on these tags see either **Message Tags** on page 149 or **Content Tags** on page 140.

**Warning:** Bad From Email addresses will be treated as a soft-bounces and you will still be charged for an email. It is up to you to make sure that if you are using special tags, field tags, or content tags in the from address, that they are replaced with valid email addresses. For more information on bounces, see **Email Bounce** on page 196.

**Enable Sender Authentication** - Checking the Enable Sender Authentication box will sign your email message with DomainKeys/DKIM. DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email. This digital signature is verified by the receiving mail server to ensure that it is not forged. DKIM is a variant of DomainKeys and is also supported by the application. To
enable DomainKeys, you must enable Sender Authentication when scheduling an email message to be sent. Both DomainKeys and DKIM can optimize your email message delivery to Hotmail, MSN, and Yahoo! email addresses.

**Enable Reply Tracking** - Enabling Reply Tracking will store a copy of all email replies to your email messages on the Email Replies page. You may find this option convenient if you need someone other than the email address in the From line to read email replies, or simply want the application to store email replies. You will notice that when you enable reply tracking, the from address will change. In order for Reply Tracking to function, the domain of the from address needs to be the same as the originating mail server. This change also allows the SenderId framework, which provides additional sender verification, to be fully enabled. If you would like to have maximum sender verification, then Reply Tracking should be enabled.

> **Tip:** For more information on the Email Replies page, see Email Replies on page 317.

**Select Email Recipients**

In the Select Recipients section, you will choose who will receive the email message.

You can choose to send a message to specific lists or segments or to your Facebook or Twitter accounts. Click on the Lists, Segments, Twitter, or Facebook tabs to view the options for each. You can also use the search box to search for specific lists or segments by name. The options that you have selected are displayed under the Total Contact Selected area.

The application ensures that contacts will only receive a single version of a message, even if they are on more than one recipient list.

> **Note:** If a message is scheduled to go to a list/segment of unsubscribed contacts, or if all contacts are deleted from the list/segment before the message is sent, the delivery is marked as skipped. For more information on viewing the status of email deliveries, see View Sent Email Deliveries on page 1001.

Though changes to list membership are made in real-time, the number that indicates the number of active contacts on a list is updated nightly. Therefore, the numbers shown here might not reflect recent changes to list membership. However, any contacts added to or removed from the list will still be sent (or not sent) the message based on their list membership as appropriate.
Schedule An Email Delivery For a Specific Time

In the Delivery Scheduling section, you specify when the email message will be sent out. If you wish to send the email message immediately, you can click the Send email message now radio button. If you wish to pick a specific time to send the email message, follow the instructions below.

You also have the option of optimizing the message delivery based on contact behavior. For more information about this see Optimize The Sending Time Of An Email Delivery on page 284.

Note: Some content is pulled into your message when you schedule a future delivery. For more information about this, see Message Tags on page 149.
Tip: Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. The worse your sender reputation is with ISPs, the more likely you are to have a low sender rating in the application. Spreading your email delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender reputation and sender rating than the same 20 complaints received over 15 minutes.

For more information on your sender rating, see Sender and Delivery Rating on page 309.

To send an email message at a specific time:

1. Click the Send at this time radio button.
2. Click in the Send at this time text box to reveal the pop-up calendar.
3. Select a specific year, month, and day to send the email message.
4. Click in the next box and choose a specific time of day to send the email message.
5. Select AM or PM.
6. Select the delivery rate for the delivery using the **Send Emails** pull-down menu.

   We recommend spreading your delivery over time only if you are sending to more than 2,000 contacts.

   You can select a default throttle time for email deliveries. For information on setting the default throttle time in your account, see [Set A Default Throttle Time For Your Account on page 1333](#).

**Optimize The Sending Time Of An Email Delivery**

Send time optimization automatically schedules email messages to send at the time of day, and optionally the day of the week, a contact is most likely to open emails from you.

You should avoid using send time optimization for time sensitive deliveries where you want to control when email is sent.

Send time optimization is calculated for each contact based on their open history. If there are no opens recorded for a contact, the delivery time you selected using the **Send message now** or **Send at this time** radio buttons is used. If the contact has:

- 1 to 10 recorded opens: the email is sent at the open time that occurs most frequently in a contact's open history. So if a contact has opened five emails and two of those were opened at 8 p.m. and the other three emails were open at 1, 2, and 4 p.m. the email is sent at 8 p.m. (This is the statistical mode.)
- 10 or more recorded opens with a standard deviation of less than 5: the message is sent at the average of all of the open times. This may or may not match one of the recorded open times. For example, if 10 opens were recorded for a contact and five of the opens were 9 a.m. and five of the opens were at 11 a.m. then the email will be sent at 10 a.m. (This is the statistical mean.)
- 10 or more recorded opens and the standard deviation is greater than or equal to 5: the email is sent at the open time that appears most frequently in a contact's open history. For example, if 10 open times were recorded for a contact, and 3 of those times were 8 a.m., and the remaining 7 times were other unique times of day, then the email is sent at 8 a.m. (This is the statistical mode.)

Standard deviation is used to quantify the amount of variation in a set of data. The higher the standard deviation in a contact's opens history, the less effective using the average of the opens to optimize send time is. This is why we only use the mean, or average, when the standard deviation in a contact's opens history is less than 5. Sending emails at the average open time when the standard deviation is above 5 would result in more of a random than a targeted send.

The send time optimization calculation for a contact is refreshed daily.

Day optimization is based on the day of the week that the contact has the most recorded opens. If there is a tie between two days, then the first day found is used.
To use send time optimization:

1. When scheduling a message, scroll to the **Delivery Scheduling** area and choose
   - **Send message now** if you want the message to be sent as soon as it is scheduled.
   - **Send at this time** and enter a date and time if you want the message to be sent at a specific time.

   The option you select will be used for contacts that do not have sufficient open record data, including new contacts.

2. Click the **Optimize Time of Day** checkbox.

   For each contact, the **Optimize Time of Day** option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours.

3. Optional: Click the **Optimize Day of the Week** checkbox.

   For each contact, the **Optimize Day of the Week** option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week.
4. Finish scheduling your message.

**Email Frequency Caps Override**

*Email Frequency Caps Override* will ignore your account's default email frequency cap settings for a specific delivery.

Email frequency caps allow you to specify the maximum number of emails that can be sent to a contact over a given time period. For more information on setting up email frequency caps in your account, see *Set Email Frequency Caps For Your Account* on page 1330.

When you schedule a delivery, you can tell Bronto to ignore your account's default setting for email frequency caps by selecting the **Email Frequency Caps Override** checkbox.

There are a couple of reasons you might want to do this:

- You know you do not want any of the customers included in this delivery to be excluded from receiving this message.
- You're scheduling large delivery and want to avoid frequency cap from delaying the send. During delivery preparation, Bronto will evaluate contacts in a delivery to see if they meet your account's email frequency cap setting and each setting (daily, weekly, monthly) will be evaluated independently. If your delivery includes a large number of contacts, and/or you've set multiple frequency caps, it could take longer than normal to prepare your delivery to send.

**Enable Recurring Emails**

The Recurring Message option lets you schedule an email message to be delivered on a recurring basis. This schedule will continue until the specified date and can be stopped, and otherwise managed, from the Automated Message Rules page. If you have more complex needs, you can create an automated message rule. By default, the email message is set to not repeat.

For more information on automated message rules, see *Automated Message Rules* on page 419.

To set the schedule for a recurring email message:

1. Select the **This message repeats** radio button.
2. Choose how often the email message repeats using the adjacent pull-down box. You can choose:
   - **Daily**
   - **Every weekday**
   - **On selected days**

   **Note:** If you choose **On selected days**, you will need to specify specific days by clicking the checkbox associated with the day you want the email message delivery to repeat on.

3. Choose how long the email message will continue for using the **This schedule will continue** pull-down box. Your options are:
   - **Forever**
Send

• For 30 days
• For 90 days
• For 180 days
• For 1 year

Related Topics
Automated Message Rules on page 419

While you can use automated message rules (AMR) to automatically manage email campaigns, we recommend using workflows.

Enable Remailing
Remails (also known as remarketing) allow you to send a follow-up email to contacts as a reminder or to persuade them to continue along the conversion process.

The option to remail is located under the Advanced Options when you schedule a message. By default, the No remails will be sent for this message radio button is selected. When you send a remail, you can choose to either remail the current message or to send a different message.

When you set up a remail for a message, you can only remail one message. If you have more complex needs, we suggest you use a remail workflow instead. For example, if you want to remail customers different messages based on what actions they took, using a workflow is a better choice. For more information, see Build A Remail Add To List Workflow.

Remails are sent out on a per delivery basis. If you choose to send a remail, the approximate delivery time and date for the remail are shown at the bottom of the Remails section.

To remail a new email message:
1. When scheduling a message, click Show Advanced Options and scroll down to the Remails section.
2. To
   • Remail the same message, click the Resend this message to those who haven't opened the email after radio button.
   • Remail with a different message, click the Send new message radio button.
3. If you selected Resend this message to those who haven't opened the email after and want to use a different subject line for the remail
   a) Click the Change subject line to checkbox.
   b) Enter the new subject line in the Change subject line to box.
4. If you selected Send new message
   a) Click Pick.
   b) Click the message you want to send.
   c) Click Select.
5. Select the number of days that will pass before the email message is resent using the spin box.
   Make sure to use the box that is associated with the radio button you selected.
6. Specify the time for the email message to be resent.
   Make sure to use the box that is associated with the radio button you selected.
7. In the to contacts who menu, select the action that determines when the remail is sent. You can choose:
   - haven't opened to remail contacts who didn't open the first message at all.
   - have opened, but haven't clicked to remail contacts who opened the first message but didn't click any links in
     the message.
   - have clicked, but haven't converted to remail contacts who have clicked on a link in the email but haven't
     purchased anything.

8. Finish the rest of the steps you need to complete to schedule your message.

   The remail settings you set up will be applied when the message is sent.

Auto-Deliver A Report When An Email Delivery Completes

When scheduling an email delivery, you can choose to have a report emailed to you either when the email delivery
completes, or at a later time of your choosing.

Note: The report will be sent to the email address associated with the username you used to login to your
account.

To auto-deliver a report when an email delivery completes:

1. Choose to send an email message.
2. Click Show Advanced Options.
3. Click the Email me a report when the delivery completes sending checkbox.
4. Select when you want the report to be emailed. You can select:
   - Immediately after delivery completes
   - 30 minutes after delivery completes
   - 1 hour after delivery completes
   - 2 hours after delivery completes
   - 3 hours after delivery completes
   - 6 hours after delivery completes
   - 12 hours after delivery completes
   - 1 day after delivery completes
   - 2 days after delivery completes
   - 3 days after delivery completes
   - 1 week after delivery completes
5. Optional: You can CC additional people by adding email addresses in the text box.
   Multiple email addresses should be separated with commas.

Receive A Notification When An Email Delivery Completes

When scheduling an email delivery, you can setup a notification that will be emailed to you when the delivery
completes.

Note: By default, the notification will be sent to the email address associated with the user name you used to
login to your account. You have the option of CCing other people as well.
To setup a notification when an email delivery completes:

1. Choose to send an email message.
2. Click **Show Advanced Options**.
3. Click the **Email me a report when the delivery completes sending** checkbox in the **Report Options** section.
4. Select **immediately after the delivery completes (notification only)** from the **Email report** pull-down menu.
5. Optional: You can CC additional people by adding email addresses in the text box.
   Multiple email addresses should be separated with commas.

### Add An Email Delivery To A Delivery Group At Send Time

In the delivery groups section, you can assign this email delivery to a delivery group using the delivery group picker. You can use the Search box to search for a specific delivery group, or click the **Select All Delivery Groups** checkbox.

---

**Note:** When scheduling a new email delivery and adding that delivery to a delivery group, if the email message in question is already part of a delivery group, then that delivery group will be pre-checked. If any delivery groups get unchecked, the email delivery will be excluded from those delivery groups. Likewise, checking new delivery groups will add this particular email delivery to those delivery groups.

**Note:**

Messages are often composed of many individual deliveries. When you add a message to a delivery group, all past and future deliveries will be added to the delivery group. Test deliveries made using the message will not be included in the delivery group. If you want to add test deliveries to a delivery group, you will need to add them individually.
For more information on the differences between messages, deliveries, and emails, see Messages.

Select Ineligible Recipients For An Email Delivery

The Ineligible Recipients section lets you specify additional restrictions that determine ineligible recipients for an email delivery. For example, if you select list A and list C in the Select Recipients section, and then select list B as an ineligible recipient, only those contacts from lists A and C who do not appear on list B will be sent the email message. Ineligible recipients are selected in addition to the recipients selected in the Select Recipients section.

To select ineligible recipients for an email delivery:

1. Go to Messages > Messages.
2. Click on Email.
3. Click on the name of the email message you want to send.
4. Click the Regular radio button.
   The Ineligible Recipients feature can also be used when performing an A/B Split test. The steps for using the Ineligible Recipients feature with an A/B Split test differ slightly in that you must first set up the options for the A/B Split test before continuing on. For more information on setting up an A/B Split test, see Send An A/B Split Test on page 323.
5. Click Schedule.
6. Scroll down to the bottom of the page and click Show Advanced Options.
7. Scroll down to the Ineligible Recipients section.
8. Click the checkbox next to the name of the lists or segments you want to use as ineligible recipients.
   You can use the search box to quickly search lists and segments by name.

Send Different Versions Of An Email
There are several ways you can send different versions of an email.

Dynamic Content
You can use dynamic content to have messages display different content based on user conditions. See the documentation on Dynamic Content on page 180 for more information.
Message Tags
You can use message tags to do lots of things, including addressing a contact by their name or showing recommended products based on past purchases. See the documentation on Message Tags on page 149 for more information.

A/B Testing
You can use A/B Split testing to send different versions of a subject line or send 2 different emails that can be compared to find a winner. See the documentation on A/B Split Tests on page 321 for more information.

Related Topics
Message Tags on page 149
There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.
Dynamic Content on page 180
Dynamic content is an advanced feature that allows you add content to a message using conditional logic.
A/B Split Tests on page 321
A/B split tests allow you to automate the tedious steps of testing different message types and provide access to valuable testing data with a minimal investment of your time.

Schedule A Regular Delivery Of An Email
We recommend you test your email messages before sending them. For more information on sending test deliveries, see Message Testing Program.

Warning: If a delivery of an email message has already been scheduled and it is in the outgoing email message queue, you will need to stop the delivery and reschedule it in order to include any changes made to the email message after it was initially scheduled to be sent. If you don't do this, the changes you make will not be included until the next delivery of the email message.

For more information on stopping a delivery, see Stop A Delivery on page 319.

To begin scheduling a regular delivery of an email message:
1. Go to Messages > Messages.
2. Click on the name of an email message.
3. In the Schedule Delivery section, click the Regular radio button.
4. Click Schedule.

From here, you will begin selecting the scheduling and recipient details for the delivery.

Tip: For more information on selecting recipient and scheduling details, see Send Email on page 279.

Associate A Campaign With A Delivery
If you have the Campaigns feature enabled, all new deliveries you schedule must be associated with a campaign.

If you have already associated a campaign with the message you are sending you only need to select a campaign on the Send Message page if you want to associate this delivery with a different campaign.

1. Schedule a Regular, Test, or A/B Split delivery from the Email Overview page.
2. Click Edit in the Campaign section of the Send Message page.
3. Select the campaign from the list.

If you want to create a new campaign, click New Campaign, enter a name for the campaign in the Name box, select a marketing campaign type from the Type list, enter a Description, and then click Save Changes.
4. Click Apply.
5. Select the checkbox if you want to make this the (new) default campaign for the message.

**Change The Email Delivery Preparation Time**

The delivery preparation time is the amount of time prior to an email delivery's scheduled send time that we start preparing the email delivery for sending. Delivery preparation involves determining who should receive the message and when, and what version of the content they should receive. To explain how this works, let's run through an example email delivery:

1. You create an email message. To personalize the message and really make it relevant, you add in field tags and dynamic content.
2. You schedule a delivery of the email message and choose to send to three of your segments. For this example, let's say you want to send Wednesday at 3 p.m.
3. You decide to leave the delivery preparation time set to 2 hours, which is the default.

What this means is, 2 hours prior to the scheduled send time (Wednesday at 3 p.m.), we will begin getting everything ready for the send. This involves refreshing the segments and determining which contacts are on them. Once we know who to send to, we will determine what to send them. This is where we replace the field tags and dynamic content with personalized content. Provided all of this is taken care of within the 2 hours prior to the scheduled send time, your email will be sent right at 3 p.m. on Wednesday. If it is not, then the email send will be delayed.

**Additional Considerations**

- In some cases, 2 hours of delivery preparation time may not be enough. This is most likely the case if you are sending to a lot of different segments, or several complex/large segments. In this scenario, the segment calculation that occurs may take longer than the default delivery preparation time, hence causing the send to be delayed.
- Increasing the delivery preparation time does affect the recency of the data used in the delivery. For example, taken the example delivery above, if we had changed the delivery preparation time to 30 minutes rather than 2 hours, then the segments used in the delivery would potentially contain more recent data (e.g. be more up to date) because we would calculate who is on the segments 30 minutes prior to sending rather than 2 hours prior. However, you need to weigh this against the possibility that segments may take longer than 30 minutes to calculate. In this scenario, the segment data would be more up to date, but the delivery might be delayed because delivery preparation has not finished.
- Choosing a delivery preparation time involves striking a balance between data recency needs and delivery send time. If you are noticing email deliveries with delayed send times, you may consider increasing the delivery preparation time, provided you don't have stringent data recency needs.

To change the delivery preparation time:

1. Select an email message to send.
2. In the **Delivery Scheduling** section, click the **Send at this time** radio button.
   
   The option to change the delivery preparation time is not available if you click the **Send email message now** radio button. In this case, delivery preparation beings immediately after you click **Send Delivery**.
3. Select a date and time to send the delivery.
4. Use the delivery preparation pull-down menu to select when to begin delivery preparation. You can select:
   - 30 minutes
   - 1 hour
   - 2 hours (Default)
   - 3 hours
   - 4 hours
5. Continue along with the email delivery scheduling process.

**Verify Email Delivery Options**

Once you have chosen all of the options for sending an email message, click **Next**. You will be brought to the Verify Delivery Options page. From here all you need to do is review the options you have selected and click **Send Delivery** when you are finished.

**Warning:** An email message cannot be recalled or retracted once sent. Due to the way email works, no provider is able to recall email messages that have been sent out. You can cancel an email message that has been scheduled, but hasn't been sent, or is being sent, but hasn't completed. To do this, go to **Messages** > **Messages** and click on **Outgoing**. Select the email message that you'd like to cancel, and then click the **Stop Delivery** button. You will then need to OK the warning message to finalize the cancellation.

Small email deliveries going to less than 10,000 contacts should deliver in a matter of a few moments. Larger deliveries will take longer. The application sends email messages on a first-come/first-served basis. If you schedule an email message in advance, there is greater likelihood that it will be first in line, and will therefore get delivered more quickly.
Grant Or Request Message Approval

With message approval enabled, all newly created messages will require approval before they can be sent. If you don't have message approval permissions, when a message needs approval, you will need to contact a user who has been given message approval permissions and request that they approve the message.

For more information on granting message approval permissions, see Grant A User Message Approval Permissions on page 1339. For more information on enabling message approval, see Enable Message Approval Prior To Send on page 1332.

To grant or request message approval:

1. Go to Messages > Messages.
2. Click on the name of an email message.
3. If you
   • **Have message approval permissions** - All existing messages will be marked as approved, although, you can remove the approval and require that the message be approved before it can be sent again.
   • **Do not have message approval permissions** - When a message needs approval, you will need to contact a user who has been given message approval permissions and request that they approve the message.

Transactional Emails

A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

**Tip:** For more information on CAN-SPAM compliance, see CAN-SPAM Act on page 200 in help.

Important Points To Remember:

• Transactional email messages must not have false or misleading headers or subject lines.
• The subject line must only reference the transactional purpose for the email. Marketing content in the subject line is not permitted.
• The From Line must be the name of the company or entity who is party to the relationship with the contact.
• Transactional information must be presented above or before any marketing content in the email message.
• The transactional information must be presented more prominently than any marketing content.

Is My Email Transactional?

The following table explains what types of emails are considered to be transactional.
<table>
<thead>
<tr>
<th>Email Message Type/Content</th>
<th>Is It Transactional?</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abandoned cart</td>
<td>Yes</td>
<td>If a contact has a status of <strong>Active</strong>, you can send them abandoned cart emails and an abandoned cart email series. If the contact has a status of <strong>Transactional</strong>, you can only send them a one time abandoned cart email. That email should identify the sender and contain an unsubscribe link. You cannot send them an abandoned cart email series as marketing messages. You should not send abandoned cart emails to individuals who are from jurisdictions that require Opt-In consent.</td>
</tr>
<tr>
<td>Account creation</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person that their account has been activated.</td>
</tr>
<tr>
<td>Account status</td>
<td>Yes</td>
<td>This type of transactional email is used notify a person of a change in the recipient standing or status (subscription, membership, account balance, etc.).</td>
</tr>
<tr>
<td>Bid</td>
<td>Yes</td>
<td>The type of transactional email is used to notify a person when they initially bid on something (i.e. - eBay). A transactional email should not be used to notify the person of subsequent bids. It's also OK to send a transactional email notifying the person that they did or did not win the bid.</td>
</tr>
<tr>
<td>Billing</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of a rejected transaction, payment notification, or overdue payment.</td>
</tr>
<tr>
<td>Change in terms</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of a change in the terms of service/usage for a product they have purchased.</td>
</tr>
<tr>
<td>Shipping Confirmation</td>
<td>Yes</td>
<td>This type of transactional email is used to confirm that a product was received. The email must include a reference or order number and indicate the product that was purchased. It is acceptable to ask the customer if they were satisfied with the purchase process.</td>
</tr>
<tr>
<td>Email Message Type/Content</td>
<td>Is It Transactional?</td>
<td>Additional Info</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contest winner</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person that they won a contest. This email should only be sent to the winner.</td>
</tr>
<tr>
<td>Employer to employee</td>
<td>Yes</td>
<td>This type of transactional email is used to notify employees of pertinent company information, such as benefit changes and updates. Newsletters are not considered transactional emails.</td>
</tr>
<tr>
<td>Gift card notifications</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a gift card recipient that they have a gift card coming.</td>
</tr>
<tr>
<td>Gift card balance</td>
<td>Yes</td>
<td>This type of transactional email is used to remind someone of their balance on their gift card. This is considered an account balance notification.</td>
</tr>
<tr>
<td>Legal notifications</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of any legal actions directly pertaining to a product they have purchased.</td>
</tr>
<tr>
<td>Out of stock/delay in order</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person that an item is back in stock, back on order, delayed, or out of stock.</td>
</tr>
<tr>
<td>Password reset</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Policy update</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of changes to terms or a policy expiration notice.</td>
</tr>
<tr>
<td>Product features</td>
<td>Yes</td>
<td>This type of transactional email is used to show a person how to use a product they have purchased. This should be a one time email.</td>
</tr>
<tr>
<td>Product recall</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of a product recall. It should be specific to a product the person purchased.</td>
</tr>
<tr>
<td>Rebate</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of a rebate. It should be specific to a product the person purchased.</td>
</tr>
<tr>
<td>Refer-a-friend</td>
<td>Yes</td>
<td>Refer-a-friend emails must be sent as transactional emails. The recipients should not be sent any additional marketing emails until they provide explicit permissions to do so.</td>
</tr>
<tr>
<td>Email Message Type/Content</td>
<td>Is It Transactional?</td>
<td>Additional Info</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Refund</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of a refund. It should be specific to a product the person purchased.</td>
</tr>
<tr>
<td>Rewards program</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of a rewards program. It should not be used in a series of emails.</td>
</tr>
<tr>
<td>Safety or security</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of any safety or security issues regarding a product they purchased.</td>
</tr>
<tr>
<td>Warranty information</td>
<td>Yes</td>
<td>This type of transactional email is used to notify a person of warranty information regarding a product they purchased.</td>
</tr>
<tr>
<td>Welcome emails</td>
<td>Yes</td>
<td>Welcome emails should be sent as transactional emails. They should identify the sender, contain an unsubscribe link and only be sent once.</td>
</tr>
<tr>
<td>Birthday/anniversary notification</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Enhancements to product, web page, service, etc.</td>
<td>No</td>
<td>Enhancements should be sent via marketing emails or announced on a web page.</td>
</tr>
<tr>
<td>Feedback</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Forward to a friend</td>
<td>Maybe</td>
<td>It is acceptable to send a person a one time transactional email encouraging them to share an article. The email must show a link to the article. The person who receives this transactional email cannot be added to any marketing stream or marketing lists. This type of transactional email should not be used to entice the person to join or participate in something.</td>
</tr>
<tr>
<td>Invitations</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Product reviews</td>
<td>No</td>
<td>This type of email is not considered transactional because it is asking for information rather than providing information.</td>
</tr>
<tr>
<td>Reminders</td>
<td>No</td>
<td>Appointment reminders, offer expirations, and time-running-out emails are not considered transactional emails.</td>
</tr>
<tr>
<td>Re-orders</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Email Message Type/Content</td>
<td>Is It Transactional?</td>
<td>Additional Info</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Surveys</td>
<td>No</td>
<td>Post purchased survey-only emails are not considered transactional emails because they do not provide the customer with any information.</td>
</tr>
<tr>
<td>Tell a friend</td>
<td>No</td>
<td>This type of email is not considered transactional because it is a marketing message and is not related to a specific transaction between the company and that friend/person.</td>
</tr>
<tr>
<td>Thank you</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Wish-list</td>
<td>Maybe</td>
<td>This type of email is considered transactional if you are sending the person who created the wish list a reminder that they have a wish list pending. It is not considered a transactional email if the person forwards their wish list to a friend.</td>
</tr>
</tbody>
</table>

**Transactional Email Delivery Process**

The process for sending transactional email deliveries is as follows:

1. Design an email message that will be used as a transactional email. You can think of this email as a sort of template for the transactional delivery.

   For more information on what a transactional email is and what it should contain, see Transactional Emails on page 294.

2. After the email is designed, you will need to get the message approved for transactional sending.

   For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

   Any existing messages that were used for transactional email deliveries will be automatically approved for transactional sending. Only new messages created for transactional sending will need to be approved.

3. Once a message has been approved for transactional sending, you can begin sending transactional emails to contacts with a status of transactional, active, and unconfirmed using that message.

   For more information on how to send transactional emails using the API, see Send Transactional Messages Using The API on page 302 (Preferred Method).

   For more information on how to send transactional emails using the API and automated message rules, see Send Transactional Messages Using Automated Message Rules And The API on page 304.

   For more information on how to add contacts to your account with a status of transactional, see Add Contacts To Your Account With A Status Transactional Via The API on page 308.

   For more information on the different types of contact status, see Contact Status on page 1083.

Transactional email deliveries will ignore any email frequency caps you have set.

**Transactional Email FAQ**

**How do I know if what I’m sending is a transactional or relationship message?**

The primary purpose of a transactional message is to convey information regarding the action that triggered it. Transactional or relationship messages must meet one or more of these criteria.

- Assist or complete a transaction that the contact has already agreed to such as purchasing a product online.
• Provide warranty, recall, safety or security information about a product or service.
• Let a contact know about a change in terms, features, or an account balance. This can be connected to a membership, subscription, account, loan, or other commercial transaction.
• Give a contact information about their employment relationship or employment benefits.
• Send or facilitate sending goods or services that a contact has already purchased.

What if the message combines commercial content and transactional or relationship content?
If you are sending a message that includes commercial, transactional, and/or relationship content, whether your message counts as transactional depends on:
• The subject line: The subject line should relate to transactional and/or relationship content within the message.
  • Acceptable subject lines: Order confirmation, Thank you for your purchase, Order update
  • Unacceptable subject lines: Order more for free, Save $10 on next order
• Content location: Transactional content should appear in the first part of the message and also be the primary purpose of the message. Transactional content must also appear as text in the message and not as an image.

If your message contains commercial, transactional, and/or relationship content and if the subject line would lead the recipient to think it’s a commercial message, it’s a commercial message for CAN-SPAM purposes. Similarly, if the primary purpose of the message is not focused on relationship and/or transactional content, it’s a commercial message under the CAN-SPAM Act.

What if the message combines elements of both a commercial message and a message with content defined as "other"?
If you are sending a message that includes some commercial content and some content without a clear category, whether your message counts as commercial and the provisions of the CAN-SPAM Act apply depends on:
• The subject line: If a contact reading the message thinks that the message will advertise or promote a commercial product, then the message may be commercial.
• Content: If a contact reading the message thinks that the primary purpose of the message is to advertise or promote a product or service, then the message may be commercial. When determining if the content in a message is commercial, the location of the commercial content, the space devoted to commercial content and how color, graphics, type, etc. are used can all be considered.

Request Transactional Message Approval
If you have an email message that you would like to send as a transactional email, you need to request approval for that email message. When you request transactional approval, we will assess the message to ensure that the content adheres to the standards which determine if an email is considered transactional.

Note: A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

Any existing messages that were used for transactional email deliveries will be automatically approved for transactional sending. Only new messages created for transactional sending will need to be approved.

For more information on the transactional email process, see Transactional Emails on page 294.

To request transactional message approval:
1. Go to Messages > Messages.
2. Click on the name of the message you want to request transactional message approval for.
3. Click Request Approval.

4. Read through and make sure you understand the conditions of the transactional approval process.

5. Click Submit.

   The status of the message will switch to Pending.

If the message is:

- Approved:

   The status will switch to Yes and an alert will appear. Once the message is approved, you can begin sending transactional emails.

   ![Alert Image]

   **Tip:** For more detailed information on sending transactional emails, see Send Transactional Messages Using Automated Message Rules And The API on page 304.

- Rejected:
The status will switch to **Rejected** and you will receive an alert.

### View The Transactional Approval History For An Email

When viewing an email message that has been approved for transactional sending, you can view the transactional approval history for that email. You will be able to view each request, approval, and rejection made during the transactional approval process for an email.

**Note:** We do not have transactional approval history records prior to 01/01/2012. Any future approval/rejection updates will appear in this grid.

To view the transactional approval history for an email:

1. Go to **Messages > Messages**.
2. Click on the name of the message you want to view the transactional approval history for.
3. Click **View History**.
The Comment column contains comments supplied by the reviewer.

Send Transactional Messages Using The API

The optimal way to send transactional messages via the API is to use the addDeliveries call.

⚠️ Warning: If you are using API version 3, you will need to follow the instructions for Send Transactional Messages Using Automated Message Rules And The API on page 304.

To send transactional messages via the API:

1. Create an email message in the application.

   This email message acts as a template for the transactional email. The data relevant to the contact receiving the email is passed in using field tags (%%field%%), special tags (%%!field%%), API message tags (%%#field%%), and/or loop tags (%%#data_#%%).

   If you plan on asking the contact to opt-in to marketing communication, the message should include a manage preferences link. If you are using a previously sent email, or if you wish to make a test delivery prior to using the email as a transactional message with the API, the application assumes the message is a bulk/marketing email and automatically appends an unsubscribe link.

   To remove this link, re-save the message in the application prior to using the email for transactional deliveries. This removes any automatically appended links until the next delivery from inside the application.

   Note: After the email is re-saved, the unsubscribe link will continue to appear in the message preview but will not be included when the message is sent.

   For more information on creating email messages, see Create Email: WYSIWYG Editor on page 100. For more information on each type of tag that can be used in transactional messages, see the following help topics:

   - Field Tags on page 151
   - Special Tags on page 152
   - API Message Tags on page 160
   - API Loop Tags on page 163

   Example use of API message tags

   ![Example use of API message tags](image)

   Example content passed in from the API after the message is sent

   ![Example content passed in from the API](image)

2. Request transactional approval for the email message.
For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

3. Make an API call to send the transactional message you created.
   The example script below will obtain the ID for a contact and the ID for an email message, and then use those IDs to send the email to the contact.

```php
<?php
/**
 * For use with API Version 4:
 * This script will add a delivery. It will obtain of a message and a contact ID. It will use these IDs in the addDeliveries call to send the appropriate transactional message to a single contact.
 * @copyright Copyright (c) 2012 Bronto Software (http://www.bronto.com)
 */

    array('trace' => 1,
        'features' => SOAP_SINGLE_ELEMENT_ARRAYS)
);
setlocale(LC_ALL, 'en_US');

try {
    // Add API token here
    $token = "YOUR_TOKEN_HERE";
    print "logging in\n";
    $sessionId = $client->login(array('apiToken' => $token))-&gt;return;

    $session_header = new SoapHeader("http://api.bronto.com/v4",
        'sessionHeader',
        array('sessionId' =&gt; $sessionId));
    $client-&gt;__setSoapHeaders(array($session_header));

    // Get the id of the contact you will be sending to. It would be more efficient to hard-code the ID here, and you may choose to do that based on your own usage scenario(s).
    $contactFilter = array('email' =&gt; array('operator' =&gt; 'EqualTo',
        'value' =&gt; 'CONTACT EMAIL HERE'),
    );
    $contact = $client-&gt;readContacts(array('pageNumber' =&gt; 1,
        'includeLists' =&gt; false,
        'filter' =&gt; $contactFilter))-&gt;return[0];
    if (!$contact) {
        print "There was an error retrieving your contact.\n";
        exit;
    }

    // Get the id of the message you will use in the delivery. It would be more efficient to hard-code the ID here, and you may choose to do that based on your own usage scenario(s).
    $filter = array('name' =&gt; array('operator' =&gt; 'EqualTo',
        'value' =&gt; 'MESSAGE NAME HERE')
    );
    $message = $client-&gt;readMessages(array('pageNumber' =&gt; 1,
        'includeContent' =&gt; false,
        'filter' =&gt; $filter))-&gt;return[0];

```
if (!$message) {
    print "There was an error retrieving the message ID.\n";
    exit;
}

// Make the delivery start timestamp. For this example,
// we will send the delivery now.
$now = date('c');

$recipientObject = array('type' => 'contact',
    'id' => $contact->id);

// Be sure to change the generic fromName and fromEmail
// used below!
$delivery = array('start' => $now,
    'messageId' => $message->id,
    'fromName' => 'API Robot',
    'fromEmail' => 'api_robot@example.com',
    'recipients' => array($recipientObject),
    'type' => 'transactional');

$res = $client->addDeliveries(array($delivery))->return;
if ($res->errors) {
    print "There was a problem scheduling your delivery:\n";
    print $res->results[$res->errors[0]]->errorString . "\n";
} else {
    print "Delivery has been scheduled.  Id: " . $res->results[0]->id . "\n";
}
} catch (Exception $e) {
    print "uncaught exception\n";
    print_r($e);
}
?>

Note: In order to make API calls using version 4 of the API, you will need an API token. For more
information on creating API tokens, see Set Up/Edit SOAP API Access Tokens on page 1276.

To view an example use off addDeliveries where API message tags and loop tags are used, see API Message Tags
on page 160 and API Loop Tags on page 163.

Tip: The following functions were used in the above code example. Click on the names to read more
information about each API call.

• readContacts
• readMessages
• addDeliveries

Related Topics
Message Tags on page 149
There are several types of message tags that can be included in your email and SMS messages so you can target
message content to each contact who receives the message.

Send Transactional Messages Using Automated Message Rules And The API

Note: This is not the optimal way to send transactional messages if you are using API version 4. If you are
using API version 4, we suggest you follow the instructions for Send Transactional Messages Using The API
on page 302.
To send transactional messages using automated message rules:

1. Create an email message in the application.

   This email message acts as a template for the transactional email. The data relevant to the contact receiving the email is passed in using field tags (%%field%%), special tags (%%!field%%), API message tags (%%#field%%), and/or loop tags (%%#data_#%%).

   If you plan on asking the contact to opt-in to marketing communication, the message should include a manage preferences link. If you are using a previously sent email, or if you wish to make a test delivery prior to using the email as a transactional message with the API, the application assumes the message is a bulk/marketing email and automatically appends an unsubscribe link.

   To remove this link, re-save the message in the application prior to using the email for transactional deliveries. This removes any automatically appended links until the next delivery from inside the application.

   **Note:** After the email is re-saved, the unsubscribe link will continue to appear in the message preview but will not be included when the message is sent.

   For more information on creating email messages, see Create Email: WYSIWYG Editor on page 100. For more information on each type of tag that can be used in transactional messages, see the following help topics:

   - Field Tags on page 151
   - Special Tags on page 152
   - API Message Tags on page 160
   - API Loop Tags on page 163

   Example use of API message tags

   ![Example image of API message tags](image)

   Example content passed in from the API after the message is sent

   ![Example image of API content passed](image)

2. Request transactional approval for the email message.

   For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.


5. Type a name for the automated message rule in the text box.

6. Click the API Triggered radio button in the Automated Message Rule Type settings.

7. Click Next Step.
8. Click **Allow API to select sending options** or **Specify sending options** to select where the From Name, From Address, Reply address and frequency caps are set.

9. Click **Pick Message** to select the message that will be sent as part of the automated message rule.

10. Click **Verify Settings**.

11. Click **Save As Draft** or **Save And Activate**.

   The automated message rule will not be able to send email until you activate it. Clicking **Save As Draft** allows you to activate the automated message rule at a later date, whereas clicking **Save And Activate** immediately activates the automated message rule.

   You will be taken to the **Overview** page for the automated messages rule. You should make note of the sections called out in the image below when you get to the overview page.

   **Tip:** You can also get to the **Overview** page for an automated message rule by going to Automation > Automated Message Rules and clicking on the name of an automated message rule.

12. Make an API call to send the transactional message you created in step 1, via the API triggered automated message rule you setup in the previous steps.

   The example script below will obtain the ID for a contact, the ID for an email message, the ID for an automated message rule, and then use those IDs to send a transactional email to the contact via the automated message rule.

```bash
/**
 * This script will add a delivery using an API triggered automated message rule. It will obtain the ID of the automated message rule and the message sent via the automated message rule. It will use these IDs in the addDeliveries call to send the appropriate message via the appropriate API triggered automated message rule.
 *
 * @copyright Copyright (c) 2012 Bronto Software (http://www.bronto.com)
 */

$client = new SoapClient('https://xrefpi.bronto.com/v4?wsdl', array('trace' => 1, 'features' => SOAP_SINGLE_ELEMENT_ARRAYS));
setlocale(LC_ALL, 'en_US');

try {
    // Add API token here
    $token = "YOUR_TOKEN_HERE";

    print "logging in\n";
    $sessionId = $client->login(array('apiToken' => $token))-&gt;return;

    $session_header = new SoapHeader("http://xrefpi.bronto.com/v4", 'sessionHeader', array('sessionId' => $sessionId));
    $client-&gt;_setSoapHeaders(array($session_header));

    // Get the id of the automated message rule you wish to send. It would be more efficient to hard-code the ID here, and you may choose to do that based on your own usage scenario(s). The ID of the message sent via this rule will be returned as part of the messageRuleObject.

    $messageRuleFilter = array(
```
Send

'operator' => 'EqualTo',
'value' => 'API TRIGGERED AUTOMATED MESSAGE RULE NAME' )
);
$amr = $client->readMessageRules(array(
    'pageNumber' => 1,
    'filter' => $messageRuleFilter
))->return[0];
if (!$amr) {
    print "There was an error retrieving your automated message rule.\n"
    exit;
}

// Get the id of the contact you will be sending to. It would be
// more efficient to hard-code the ID here, and you may choose to do that
// based on your own usage scenario(s).
$contactFilter = array(
    'email' => array(
        'operator' => 'EqualTo',
        'value' => 'CONTACT NAME HERE'
    )
);
$contact = $client->readContacts(array(
    'pageNumber' => 1,
    'includeLists' => false,
    'filter' => $contactFilter
))->return[0];
if (!$contact) {
    print "There was an error retrieving your contact.\n"
    exit;
}

// Make the delivery start timestamp. For this example,
// we will send the delivery now.
$now = date('c');

$recipientObject = array(
    'type' => 'contact',
    'id' => $contact->id
);

// Be sure to change the generic fromName and fromEmail
// used below!
$delivery = array(
    'start' => $now,
    'messageId' => $amr->messageId,
    'messageRuleId' => $amr->id,
    'fromName' => 'API Robot',
    'fromEmail' => 'api_robot@example.com',
    'recipients' => array(
        $recipientObject
    )
);

$res = $client->addDeliveries(array($delivery)
)->return;
if ($res->errors) {
    print "There was a problem scheduling your delivery:\n";
}
In order to make API calls, you will need an API token. For more information on creating API tokens, see Set Up/ Edit SOAP API Access Tokens on page 1276.

Tip: To view an example use of addDeliveries where API message tags and loop tags are used, see API Message Tags on page 160 and API Loop Tags on page 163.

Tip: The following functions were used in the above code example. Click on the names to read more information about each API call.

- readContacts
- readMessages
- readMessageRules
- addDeliveries

Related Topics
Message Tags on page 149
There are several types of message tags that can be included in your email and SMS messages so you can target message content to each contact who receives the message.

Add Contacts To Your Account With A Status Transactional Via The API
Contacts who are not currently in the application can be added via the API with a status of transactional. This will permit the delivery of transactional emails to that contact, while preventing the delivery of marketing emails.

```php
<?php
/**
 * For use with API Version 4:
 * This script will add a contact with a status of transactional
 *
 * @copyright Copyright (c) 2011 Bronto Software (http://www.bronto.com)
 */

    array('trace' => 1,
        'features' => SOAP_SINGLE_ELEMENT_ARRAYS)
);

try {
    // Replace with a valid API token
    $token = "ADD API TOKEN HERE";
    print "logging in\n"
    $sessionId = $client->login(array('apiToken' => $token))-&gt;return;
    $session_header = new SoapHeader("http://api.bronto.com/v4",
        'accessToken',
        $token,
    );
```
array('sessionId' => $sessionId));
$client->___setSoapHeaders(array($session_header));

// Replace the example email address with a valid email address
$contacts = array('email' => 'transactionalContact@example.com',
  'status' => 'transactional');

print "adding contact with the following attributes\n";
$contacts = $client->addContacts(array($contacts)
  )->return;

// print added contact(s)
foreach ($contacts as $contact) {
    print_r($contact);
}
} catch (Exception $e) {
    print "uncaught exception\n";
    print_r($e);
}
?>

Sender and Delivery Rating

Your sender rating and email delivery ratings provide quantitative insight into the quality of your lists and emails and can be effected by email complaints.

Your sender rating is driven by the level of contact engagement (opens, clicks, conversions) your sent emails that were received, complaints your emails receive from ISP Feedback Loop, and internal measurements that we use to help you optimize your deliverability. Your sender rating is used to monitor the health of your account and to protect you from repeatedly sending to bad segments, lists, or contacts. The delivery rating is calculated on a per email delivery basis, rather than on the total email deliveries you have sent. The email delivery rating is driven by complaints an email delivery receives from ISP feedback loops, the level of contact engagement (opens, clicks, conversions) the email has, and our internal measurement thresholds. Your email delivery ratings effects the sender rating for your account.

To make things simple, we came up with a 10 point scale for sender rating. If your sender rating is:

- 6 or above then there is no negative impact on your account or your ability to send email.
- 5 or below then your bulk email deliveries will be throttled over a period of 10 hours.

If your email sender rating dips to an unacceptable level, you will receive a notification from Bronto's Deliverability Team and any email messages you send are automatically throttled over a 10 hour period. Throttling slows your email delivery speed, and thus spreads your email deliveries out over time. For example, instead of sending your email message to 100K contacts as quickly as possible, throttling will spread the delivery over a period of 8 hours. To stop the throttling, you will need to raise your sender rating back to a 6 or higher.

The sender rating is calculated based on a rolling, 30-day period. After 30 days events are dropped from the calculation.

Keeping an eye on your email delivery ratings is a good way to help keep your email sender rating high. It is important to remember that the number of email complaints you receive is tied to your email deliverability - a high
numbers of email complaints, coupled with a low level of contact engagement, will negatively affect your email deliverability. Email complaints occur when an unsubscribed user elects to fill out a Complaint Webform or when one of your contacts submits an unsolicited email complaint via an inbound email to our abuse team or through an ISP feedback loop.

**Note:** ISP feedback loops are services provided by some ISPs which allow us to receive notices when a contact clicks a Spam or Unsubscribe button in their email client.

We maintain a history of all email complaints in all accounts and use internal measurements to calculate each account's email sender rating. Accounts that generate few email complaints will encounter few email delivery problems. Conversely, accounts that generate numerous email complaints will see their email deliverability negatively affected. Upon receiving an email complaint, Bronto automatically unsubscribes the contact in your account. We will also log the event in our customer tracking system.

**Tip:** Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. The worse your sender reputation is with ISPs, the more likely you are to have a low sender rating in the application. Spreading your email delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender reputation and sender rating than the same 20 complaints received over 15 minutes.

With this in mind, even if you have a high sender rating, you still need to look for ways to reduce your email complaints and increase contact engagement. For example, you may have an email sender rating of 10, and while this is a good thing, it does not necessarily mean you are performing perfectly. Rather, it means that you are doing well in comparison to other marketers using the application, and that your emails are generally performing well according to our internal measurement thresholds. You may still have some email complaints, and there is always room to improve contact engagement. We suggest reviewing ways to decrease email complaints and increase contact engagement, rather than taking your email sender rating as absolute and becoming complacent with your current practices. Always striving to improve your email marketing campaigns is essential!

If you notice that your sender rating has dropped, you may be able to pinpoint deliveries with low delivery ratings as contributors to your low sender rating. Always look for ways to improve your email delivery rating, even when your delivery rating is high. We suggest monitoring the email complaints an email delivery receives and continually trying to reduce that number. The best place to track complaints is on the Deliverability tab of a Delivery Report.

Additionally, finding ways to increase contact engagement (opens, clicks, conversions) will have a positive impact on your email deliverability ratings.

By tracking email complaints and enforcing restrictions on accounts with excessive email complaints, we are able to protect the overall email deliverability of our customers and the inboxes of our contacts from any single account that violates our terms of service by sending unsolicited email.
Tips For Fixing A Low Email Sender/Delivery Rating

A low email delivery rating indicates serious flaws in an email delivery and should be fixed. A low email sender rating indicates an even more urgent problem, as your email sender rating is an aggregate of all your email delivery ratings and effects your ability to send.

Here, we have included a series of questions to help you to determine why your ratings are low. Your answer to these questions should help pinpoint the problem and reverse the actions that have led to low ratings.

Question 1: Have You Recently Imported Any New Contacts? A New List?

When a contact makes an email complaint it is typically because they simply did not want to receive the email or do not remember signing up for emails from your account. When you receive a lot of complaints associated with a list it's important to ask yourself, “Where did this contact list come from”? If your list came from one of these sources or scenarios:

• List rental: Are you sending an email message on behalf of some other company or organization to one of your lists?
• Purchased list: Did you pay money to acquire the list?
• Co-registration: Do contacts that sign up to receive your email messages also receive email messages from another company you are a partner with?
• Borrowing a list from some other company, department, or organization?
• Has it been over two years from the point of collecting the address to your Bronto delivery?

Then there's a good chance that contacts on the list complained because they never agreed, or don't remember agreeing, to receive email messages from you. In other words, these contacts did not give explicit permission.

If you answered YES to any of the questions above, you are probably sending to an unhealthy list comprised of contacts who either don't want to, or never agreed to, receive email messages from you or sending to a dated list of contacts who do not remember signing up. Maintaining a healthy list of contacts that want to receive your email messages is essential to achieving a strong email delivery and email sender rating. Sending to contacts you know are healthy, as well as working with Bronto's Deliverability Team to resolve issues with an unhealthy list, can help improve your rating.

If you answered NO to all of these questions, continue on to question 2.

Tip: If a contact is frequently complaining and you want to stop sending email to them, you can add them to your suppression list. For more information on the suppression list, see Suppression Lists on page 1403.

Question 2: Have You Made Any Significant Changes To Your Email Message In The Past 30 Days?

If your email delivery rating begins to unexpectedly fall, despite that fact that you continue to send to a healthy list that has seldom complained in the past, then the problem may be with your email message. You should ask yourself:

• Have I deviated from the way I normally compose my subject line?
• Have I changed my from name and/or from address?
• Is the look and feel of my email message content drastically different?
• Am I sending co-branded or partnered emails?
• Have you increased sending volume to your contact lists?

If you answered YES to any of these questions, then try tinkering with your email message. Keep the things that have worked in the past, and be cognizant of the impact of making large changes in the future.

If you have answered NO to all of these questions, continue on to question 3.

Question 3: I Have Gone Through Questions 1 and 2, Now What?

If you have gone through questions 1 and 2 and still cannot find out why your email sender and delivery ratings are low, then you should contact Support. Chances are, there is an issue unique to your situation that they will be able to pinpoint and help to remedy. To contact Support, click on the Support link in the top right corner of the screen.
For more information on the email sender rating and email delivery rating, see Sender and Delivery Rating on page 309.

**How Bronto Tracks Emails**

In order to track emails, the application inserts a hidden piece of HTML called a web beacon into the email.

Web beacons are a common method for tracking internet activity. Each time a recipient pings the web beacon - which happens when the email is viewed with images on - the application tracks the email as opened. For this reason, the application only tracks rich text and HTML messages. The application does not track plain text emails, because it is impossible to pass HTML entities, like web beacons, via simple plain text emails. Additionally, if an email client blocks images from downloading, then the application cannot register the email as opened. You should also remember that any contact that clicks an email without downloading images will still count as an implicit open.

We currently track all data at the time our reporting system records a metric (i.e. an open occurs, a click occurs, etc.), and not at the time an email is sent. Thus, if a contact was removed from a list or segment that an email was sent to, then the report for that message and delivery would include data for that contact in the message and delivery report, but not in the delivery recipient reports. Because of this, you may notice a discrepancy between your totals on a message or delivery report, and the numbers that appear on the delivery recipient reports. This discrepancy could include lower values for metrics on a delivery recipient report, where contacts were removed from a list or segment, and higher metrics values for message and delivery reports that contain data for contacts who appear on more than one list or segment.

**Weekly Drip / Waterfall Campaigns**

Drip campaigns (aka waterfall campaigns) are a powerful tool that you can use to automatically send messages to your contacts on a scheduled basis.

In this example, you will learn how to create a drip campaign to remind your contacts that they need to renew their subscription. The drip campaign you create will automatically send messages to your contacts on a weekly basis leading up to the date they have to renew their subscription. To help you visualize what you will be creating in this example, take a look at the timeline below. You can use this timeline to get an idea of which rule, is sending which content, to which segment at a given point in time leading up to the renewal date.

Building a drip campaign (aka a waterfall campaign) is a common practice amongst email marketers. In order to create a drip campaign, you should be comfortable with creating messages, segmentation, and automated message rules.

**Create A Weekly Drip/Waterfall Campaign Using Automated Message Rules**

In order to create a drip campaign, you should be comfortable with creating messages, segmentation, and automated message rules.

To create a drip campaign:
1. Go to Messages > Messages.
2. Click Create New Message.
3. Create four different messages corresponding to each week of your drip campaign.
   For this example, we will name them Week 1 Content, Week 2 Content, etc.
4. Go to Tables > Contacts > Fields.
5. Click Create New Field.
6. Create a field with a Type of date.
   This field will hold a date which your campaign is relative to (for this example, that is a contact's subscription renewal date). Fill in the rest of the information required to create the field (Name, Label, and Visibility). For this example, we will name the field renewaldate.
   For this example, we will talk about a date in the future. If you want to use a date in the past (Sign-up date, etc.), you can do this simply by changing which operators you use to build your segments in the coming steps.
   Tip: If you are using the API to automatically update the data in the field used by your campaign, then contacts will automatically move in and out of the segments you create below. For example, when a contact renews their subscription, you automatically update their old renewal date with their new renewal date via the API. However, let's say you manually import the renewal date field data for your contacts. You never change this date, but rather create an additional field to hold data indicating whether or not a contact has renewed their subscription (for example a field called renewed that holds the value true for renewed and false for not renewed). In this scenario, you would need to create a separate segment for the drip campaign to handle whether or not a contact has renewed their subscription. See Handling Renewed Contact Subscriptions below to learn how to create this segment and tie in into the drip campaign.
7. Click Save.
8. You now need to build 4 (or however many is required) segments to look out up to 4 weeks in the future. In your first segment, add a new rule filtering contacts whose renewaldate field (which you created earlier) value is within the next week. Save it as Drip Campaign Week 1. To build the Drip Campaign Week 1 segment:
   a) Go to Tables > Contacts > Segments.
   b) Click Create New Segment.
   c) Give the segment a name in the Name text box. For this example, we will be calling this first segment Drip Campaign Week 1.
   d) Choose Field from the first pull-down menu (i.e. the criterion).
   e) Choose renewaldate from the second pull-down menu. By default it displays Select a field.
   f) Choose is within the next from the third pull-down menu (i.e. the operator).
   g) In the text box next to the third pull-down menu, add the value. For this example, use 1 week.
   h) Click Save Segment.
   You will be returned to the All Segments page.
9. From the All Segments page, find the row associated with the Drip Campaign Week 1 segment you just created.
10. Click the Copy Segment icon.
   a) Change the name of the segment to Drip Campaign Week 2.
   b) Change the value of the segment from 1 week to 2 weeks.
   c) Click the Select contacts who match one or more of the rules described below radio button at the top of the page.
d) Click **Add additional criteria.**
e) Choose **Field** from the first pull-down menu (i.e. the criterion).
f) Choose **renewaldate** from the second pull-down menu.
g) Choose **is not within the next** from the third pull-down menu (i.e. the operator).
h) In the text box next to the third pull-down menu, you will add the value.
   For this criteria, you will type in 1 week. This will bracket people between the end of week 1 and the end of
   week 2.
i) Click **Save Segment.**

**11.** Repeat the previous step (and it's sub-steps) for however many weeks out you need your campaign to run.

**Note:** If you were making this a “backward looking” campaign, your first segment would be “within the last 1 week”, etc.

12. Go to **Automation > Automated Message Rules.**
13. Click **Create.**
14. Name the first automated message rule **Drip Campaign Week 1.**
15. Choose **Scheduled Recurring** as the type.
16. From the Type Settings section, choose **Weekly** from the Messages Repeats pull-down menu.
17. Choose the lists and or segments you want this automated message rule to send to.
   For this particular rule, choose **Drip Campaign Week 1 segment.**
18. Click **Next Step**.

19. Fill out the Sending Options (from name, from address, reply address, etc.).

20. Choose the message that will be sent for this automated message rule.

   For this particular rule, you would pick the message **Week 1 Content**.

21. Choose the Timing Options for sending the message sent via this automated message rule.

   This example assumes you will be sending on the first day of each week (Sunday). If you want to choose another day, you can do so on the first page of the automated message rule wizard by choosing "On selected days" instead of "Weekly", and then choosing Monday for instance.

   **Warning:** Make sure you only choose a single day for all your automated message rules, or you may have overlapping segments during a single week.

22. Click **Verify Settings**.

23. Review your selections and click **Save As Draft**.

   You can activate the automated message rule now if you wish, but it is probably better to make all the automated message rules and then activate them as a group.

24. Repeat the process of creating automated message rules for the other weeks in your campaign, being sure to select the appropriate message to be sent to the appropriate segment.

25. After each automated message rule is created, go to **Automation > Automated Message Rules**.

26. On the All Automated Message Rules page, find the rows that correspond to the automated message rules you just created and click the **Activate Rule** icon.

To learn about handling renewed contact subscriptions see **Manage Renewed Contact Subscriptions** on page 316.

**Related Topics**

**Automated Message Rules** on page 419
While you can use automated message rules (AMR) to automatically manage email campaigns, we recommend using workflows.

**Manage Renewed Contact Subscriptions**

As previously noted, this section applies to you if you find yourself in this scenario: You manually import the renewal date field data for your contacts. You never change this date, but rather create an additional field to hold data indicating whether or not a contact has renewed their subscription (for example a field called **renewed** that holds the value **true** for renewed and **false** for not renewed). In this scenario, you would need to first create a separate segment for the drip campaign to handle whether or not a contact has renewed their subscription. After you created this segment, you would disable sending to this segment for each automated message rule you created above, by adding this segment to the rule's ineligible recipients.

**Tip:** You can use the API to automatically update the data in the field used by your campaign. By doing this, contacts will automatically move in and out of the segments you create for your drip campaign. For example, when a contact renews their subscription, you automatically update their old renewal date with their new renewal date via the API. If you did this, there would be no need to create a separate segment and add ineligible recipients to the automated message rules.

To create the segment to handle renewed contacts:

1. Go to **Tables > Contacts > Segments**.
2. Click **Create New Segment**.
3. Give the segment a name in the Name text box.
   For this example, we will call the segment **Renewed Contacts**.
4. Click the first pull-down menu (i.e. the criterion).
   By default it displays **Email Address**. Choose **Field**.
5. In the second pull-down menu.
   By default it displays **Select a field**, choose **renewed**.
6. In the third pull-down menu (i.e. the operator), choose **is**.
7. In the text box next to the third pull-down menu, add the value.
   For this example, you will type in **true**.

   **Note:** This assumes that a value of **true** for the **renewed** field indicated that the contact has renewed their subscription.

8. Click **Save Segment**.
   You will be returned to the All Segments page.

To add the segment to the automated message rule's ineligible recipients:

9. For each automated message rule you created above, skip to Step 2 in the create an Automated Message Rule wizard.
10. Scroll to the bottom of the page and click **Advanced**.
11. In the **Additional Contact Filtering** section, click the **Ineligible Recipients** tab.
12. Click the **Segments** tab.
13. Locate the **Renewed Contacts** segment and click the checkbox associated with it.
14. Click Verify Settings.
15. Review your selections and click Save As Draft.

Remember you will need to activate the automated message rules in order for them begin sending messages.

Email Replies

Email replies are emails sent from your contacts in response to email messages you send them.

Depending on the nature of the email messages you are sending, email replies can be an important metric. For instance, a personalized email message sent from your sales team should solicit email replies. Also, email message replies sometimes get caught in spam filters or junk folders. By aggregating email replies, we ensure that you have easy access to email messages from your contacts.

On the Email Replies page, you can view all of the email replies that you have received. Replies stored in Bronto are subject to the data retention policy and will expire based on the data retention period for your account. See Data Retention Policy on page 1509 for more information. In order to track email replies, you need to Enable Sender Authentication when sending email messages. Enabling Sender Authentication automatically encodes an email message with SenderID and DomainKeys/DKIM. To enable Sender Authentication, click the enable Enable Sender Authentication checkbox when sending an email message. If you are sending personalized email messages, or if you are sending B2C marketing email, then you should certainly consider using DomainKeys.

For more information on configuring the email replies settings in your account, see Email Reply Settings on page 1350.

SenderID

SenderID is an email technology primarily promoted by Microsoft that minimizes phishing attacks and ensures that permission-based email marketing emails get delivered.

This is based off of the Sender Policy Framework (SPF).

SenderID works by specifying which mail servers are allowed to send mail for a given domain name. The application has this setup, however, only mail that is sent with Reply Tracking enabled will be able to be fully verified. This is because Reply Tracking messages have a from name with the same domain as the sending mail server.

DomainKeys (DKIM)

DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email.

This digital signature is verified by the receiving mail server to ensure that it is not forged. DKIM is a variant of DomainKeys and is also supported by the application. To enable DomainKeys, you must enable Sender Authentication when scheduling an email message to be sent. Both DomainKeys and DKIM can optimize your email message delivery to Hotmail, MSN, and Yahoo! email addresses.

Email Replies Table Columns

The Email Replies table contains the email replies you have received and all the information associated with them.

Each of the columns in the table is described below.

Type Column

The type column indicates what type of email reply you have received. Email replies are given a type of:
Automated - These are replies classified as automated and are usually automated vacation of OOO (out of office) replies.

Tip: If you are receiving a large number of automated replies or just don't want to deal with them, you can choose to automatically delete automated email replies. For information on automatically deleting automated email replies, see Automatically Delete Automated Email Replies on page 1351.

Unsubscribe - These are replies classified as unsubscribe requests.

Tip: We allow you to specify keywords found in reply subject lines which when found, will automatically unsubscribe the contact. For information on automatically handling unsubscribe requests, see Automatically Handle Email Unsubscribe Requests on page 1351.

Spam - These are replies determined to be spam by our spam filtering software.

Tip: We allow you automatically delete any replies determined to be spam. For more information on automatically deleting replies determined to be spam, see Filter Out Email Replies Determined To Be Spam on page 1351.

Normal reply (no icon shown for normal replies)

**Subject Column**
The subject column displays the subject line for the email reply.

**Status**
The status indicates if the contact who sent the email reply is subscribed to one of your lists, or is invalid. A contact can have a status of:

- Invalid
- Subscribed
- Unsubscribed

**From Column**
The From column indicates the from name used for the email reply.

**Received**
The received column shows you when the email reply was received.

**Delete And Unsubscribe Email Replies**
You can delete email replies and choose to unsubscribe contacts who have sent requests to be deleted.

For the email replies that appear in the Email Replies table, you can click Delete to delete email replies that you do not need to keep, or click Unsubscribe and Delete to unsubscribe and delete contacts that have requested to be unsubscribed and who no longer need to be in your account.

**Export Email Replies**
You can export your email replies to a .CSV file from the Email Replies page.

To export email replies:

1. Go to Messages > Email Replies.
2. Click Export.
3. Choose the type of email replies you want to export using the Type pull-down menu. You can choose between
4. Choose the date before or the date after for which you would like to receive the email replies report. Click the calendar icon to choose a specific date.
5. Optional: Choose an email address to be notified when the export is finished.
6. Click Generate.
   You will be notified in the application when the report is finished. Additionally, if you choose to have an email address notified in the previous step, that address will receive an email as well.

Stop A Delivery
Deliveries which have yet to be sent or are in the process of sending can be stopped on the Message Overview page. This will not recall any messages that have already been sent. If you want to stop a delivery because there's a broken link in your message you can use link repair to fix the link instead.

To stop a delivery from the Message Overview page:
1. Go to Messages > Messages.
2. Click on Outgoing.
3. Click on the name of an email message.
4. In the Deliveries Of This Message section, click the checkbox next to the delivery you want to stop.
5. Click Stop Delivery.

Related Topics
Fix A Link In A Sent Or Scheduled Message on page 334
You can use link repair to change a link in a delivery that has already been scheduled.

Test Email
Continuous testing (and re-testing) is the only way to maximize your email marketing investment.
Sending test deliveries of your message helps ensure it is ready to be sent to your contacts. Test messages can be useful for checking client rendering and proofing copy/content. Another important reason to send test messages is that they are not included in aggregate reports. This means that if you send three or four test messages, you won't have to worry about the metrics from the test deliveries appearing on the report for the actual messages you send to contacts.

Here are a few thoughts about setting up a basic testing program.
• List Selection - First, you need to find a test group. We recommend picking a list that you send messages to on a regular basis. An established list will already have a baseline of tracking information that you can use to compare results from testing.
• Establish A Baseline - Compare the tracking metrics for recent deliveries sent to your chosen list. Note the time each message was sent, the day, content, and subject line. These are items that you will want to test.
• Build Test Segments - Use A/B splits to set up your test segments. The application can randomly deliver 2 (or more) versions of the same delivery to random contacts on the list.
• Compose And Send The Message - Take special care to change only one element at a time so that you are able to isolate cause and effect.
• Evaluate Results - Access tracking reports for each message and compare. Hopefully you'll notice variation in your results right away. If so, great! Start looking for a trend. Take the best performing version and keep testing.

If you don't see any changes, don't get discouraged. Perhaps the variation in the 2 versions was not significant enough to yield different results. Perhaps you need to continue to run a similar test over a course of a few deliveries to assess
the outcome. Whatever the case may be, the beauty of email marketing is the ability to track progress. With a little time and creativity, you should be able to find what works best for you.

**Send Test Email Deliveries**

Sending test deliveries of your message helps ensure it is ready to be sent to your contacts. Test messages can be useful for checking client rendering and proofing copy/content. Another important reason to send test messages is that they are not included in aggregate reports. This means that if you send three or four test messages, you won't have to worry about the metrics from the test deliveries appearing on the report for the actual messages you send to contacts.

Before you send a test delivery, you may want to configure your account's **Test Message Delivery Options**. These options allow you to test with HTML and plain text versions of your email and to append text to the subject line of test messages. You can configure the **Test Message Delivery Options** on the **Home > Settings > General** page. For more information see **Set Up Test Message Delivery Options** on page 1331.

**Tip:** Any tracking or order conversion data collected from a test send are not reported in Segments.

To schedule a test email delivery:

1. Go to **Messages > Messages**.
2. Click on the name of an email message.
3. In the **Schedule Delivery** section on the **Email Message Overview** page, click the **Test** radio button.
4. Click **Schedule**.
5. Select the recipients for your test message.

When choosing who will receive your test message, you can specify individual email addresses in the **Recipient Addresses** text box, or choose a list or lists from **Lists**.

**Warning:** Any email addresses new to your account specified in the **Recipient Addresses** text box will be added as transactional contacts. If you want to add these email addresses as Active contacts, import the email addresses before you send the test email.

For more information on each type of contact status, see **Contact Status** on page 1083. For more information on importing contacts, see **Contact Imports** on page 1080.

6. Optional: Add a note in the **Optional Note** text box.

   The note will appear at the top of the test message.

7. Optional: Click the **Use a random contact for personalization** checkbox to use random contact data to test personalization.

   This tests the field tags you have added to your message by pulling a matching field value from a random contact and using it within your test message.

   **Note:** Only the field values from the random contact are included - the random contact is not sent the test message. Only the contact(s) you specify in the **Select Recipients** area receive the message.

   For more information on field tags, see **Field Tags** on page 151.

8. Select either
   
   • **Send email message now** to send the test email right when you finish scheduling the test message.
   
   • **Send at this time** and select a date and time from the box in order to send the message on a specific date and time.

9. Optional: Test delivery optimization by selecting **Optimize Time of Day** and, if desired, **Optimize Day of the Week**.
For more information see Optimize The Sending Time Of An Email Delivery on page 284.

10. Click Next.
11. Review the details of your test message delivery.
12. Click
   - Send Delivery to schedule the test delivery.
   - Cancel to cancel the test delivery.
   - Back to return to the previous page in order to change the details of the test delivery.

A/B Split Tests

A/B split tests allow you to automate the tedious steps of testing different message types and provide access to valuable testing data with a minimal investment of your time.

Do you ever have a problem deciding between a few different subject lines? Maybe you were sure that one was better, but a co-worker disagreed? Well, maybe you're both wrong. A/B split tests allow you to quickly compare multiple versions of a message in a way that lets you discover the best performing option. Whether it's the best subject line, or a choice between two images, A/B split tests take judgment calls out of the equation.

An A/B split test starts with between two and twenty groups of contacts chosen randomly from the contacts targeted in a delivery. A message is sent to those groups with a variable, such as different subject lines, From Name & Addresses, different message content, or date and time of send variations. After the messages are delivered, you can review the results and identify which version performed better. This information can drive future marketing choices. The following tips will help you set up a successful A/B split test:

- The name “A/B split” indicates that you are choosing between varying versions of an email message. Always remember to minimize the difference between the different versions you create. If you change many things in each test, then you may have a hard time understanding why one group outperformed another. Rather than having multiple variables, you should consider changing only one thing at a time and running several splits over a few deliveries.
- Have you ever had a subject line that was pretty good, but didn't make the cut? Try a Champion/Challenger test with it, and you may be surprised by the results. Try that every couple of deliveries, and you might find yourself doing a lot more A/B-Winner splits.
- From Name & Address tests are good for a new list or mailing, but aren't a great idea on an established list. Remember that changing your From name or address can cause confusion amongst contacts and even cause you to lose inbox whitelisting with some ISPs.
- With Full Message Content tests, remember not to get pulled into the trap of using two drastically different versions of a message. Rather, use this type of test to examine how simple design tweaks, such as order and positioning of links and images, affects the amount of clicks your message receives. You may be surprised to see how simple changes, like moving your call to action to the area of the message above the fold, will help drive clicks in your message.

Related Topics

A/B Split Report Split Groups Metrics on page 662
The Split Groups tab on a split report provides a lists of the split groups associated with the A/B Split test and the high-level metrics associated with each group.

A/B-Winner Splits

You can use an A/B winner split test to automatically send the most successful message.

An A/B Winner split test involves testing messages with two or more groups to see which is most effective. After a set period of time, a winner is chosen based on preselected criteria, such as highest open rate or highest number of clicks. After the winner is selected, the winning message is sent to the remainder of your targeted contacts.
For an example, let's say you create two groups, A and B. Each group is made up of 20 percent of your targeted contacts. The messages you send each group has different subject lines.

- Group A gets the subject line “Act Now! 25% Sale Ends Tomorrow”
- Group B receives the “25% Off Sale Extended Through Tomorrow” subject line.

You select **Highest Open Rate** as the winning criteria and the messages are sent out at 11:00 AM. You then set the winner to be sent at 2:00 PM. If at 2:00 PM, Group A has a higher open rate then Group B, the remaining 60% of the targeted contacts will be sent a message with the Group A subject line “Act Now! 25% Sale Ends Tomorrow”.

The time set for the winner is the time the winner is selected and Bronto begins delivery preparation. Delivery prep involves determining who should receive the message and what version of the content they should receive. This includes things like refreshing segments and identifying content to replace message tags, so the winning message will not send at the exact time you selected. How long delivery prep takes can vary depending on the size of the send and the complexity of the message. If it is important that the message is sent by a specific time, we suggest scheduling the winner selection 30-60 minutes before it should be sent.

### Related Topics

- **A/B Split Report Split Groups Metrics** on page 662

The **Split Groups** tab on a split report provides a list of the split groups associated with the A/B Split test and the high-level metrics associated with each group.

### Champion/Challenger A/B Splits

Champion/Challenger test are similar to A/B-Winner tests, the difference being that you don't have a winner group. In this type of test, you have an established way of doing something, called the Champion, and you want to test if it is still the best by introducing a Challenger. An example of this is testing a new template design or header image compared to your current standard. When creating a Champion/Challenger split, it is common to send most of your contacts the champion, while setting aside a smaller portion for the challenger. Once the test is run, there is no winner group who receives a message, but you do have a good idea about whether or not your champion is as good as you thought it was.

For example, let's say you have a newsletter that you always send out which uses the name of each contact's account manager as the From name. A snappy new person in your marketing team thinks that it would resonate better coming from the company name. You can easily set aside 10% of your next delivery to receive a message with your company name as the From name in the message. Then, when you go to check your reports, you can compare results to see how good that idea really was.
Send An A/B Split Test

An A/B split test is scheduled similar to a normal delivery. First you configure the settings for your split and then you set up the delivery like a normal send.

To setup an A/B splits test:

1. Go to Messages > Messages.
2. Click on Email.
3. Click on the name of an email message you want to perform an A/B split test on.
4. Click the A/B Split radio button in the Schedule Delivery section.
5. Click Schedule.
6. Select what you'd like to perform the test from the Split Content list:
   - **Subject Line** - lets you test different subject lines for your message. Use this if you want to see how varying subject lines affect open rates.
     
     Tip: For tips on how to write effective subject lines, see Effective Email Subject Lines on page 203.

   - **From Name & Address** - lets you test different from names and from addresses used in your message. Use this if you want to see how varying the from name and from address affects the open rate for your message.

   - **Full Message Content** - allows you to monitor how minor tweaks to message content can affect the metrics associated with user actions that occur after the message is opened, such as clicks and conversions.

   - **Date and Time of Send** - allows you to see how altering the send date and time can affect the open rate for your message.

7. Select the type of split test to run in the Type Of Split section:

   - **A/B-Winner** - tests messages with two or more groups to see which is most effective. After a set period of time, a winner is chosen based on preselected criteria, such as highest open rate or highest number of clicks. After the winner is selected, the winning message is sent to the remainder of your targeted contacts.

   - **Champion/Challenger** - similar to A/B-Winner tests, except there isn't a winner group. Instead you have an established way of doing something, called the Champion, and you want to test if it is still the best by introducing a Challenger. For example, use this to test a new template design or header image compared to your current standard. When creating a Champion/Challenger split, it is common to send most of your contacts the champion, while setting aside a smaller portion for the challenger. Once the test is run, there is no winner group who receives a message, but you do have a good idea about whether or not your champion is as good as you thought it was.

8. If you chose A/B-Winner: Select the winning criteria from the Winning Criteria list.

   This allows you to specify which metric determines the best performing group.
**Note:** If you choose Champion/Challenger, skip this and go to the next step.

### Type Of Split

An A/B-Winner split allows you to test several groups against each other with the winning content sent to the remainder of your targeted contacts. You select the criteria for the winning criteria below. A Champion/Challenger split works the same, except no winner group is sent out. Would you like to learn more about A/B Splits? Read the A/B Split Help Overview.

The winning criteria you can choose from are:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description Of Criteria</th>
<th>Description Of Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Highest Open Rate</strong></td>
<td>The winner will be determined by which version of the message has the highest open rate. For more information on the open rate metric, see <a href="#">Open Rate Metric</a> on page 882.</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em>. The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
</tr>
<tr>
<td><strong>Highest Click Rate</strong></td>
<td>The winner will be determined by which version of the message has the highest click rate. For more information on the click rate metric, see <a href="#">Click Rate Metric</a> on page 858.</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em>. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
</tr>
<tr>
<td>Criteria</td>
<td>Description Of Criteria</td>
<td>Description Of Metric</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Highest Conversion Rate</strong></td>
<td>The winner will be determined by which version of the message has the highest conversion rate. For more information on the conversion rate metric, see Conversion/Delivered Rate Metric on page 864.</td>
<td>The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.</td>
</tr>
<tr>
<td><strong>Highest Revenue Per Contact</strong></td>
<td>The winner will be determined by which version of the message has generated the most revenue per contact. The revenue per contact is determined by dividing the conversions by the sent number.</td>
<td>For more information on the conversions and sent metrics, see Conversions Metric on page 865 and Sent (Emails) Metric on page 887.</td>
</tr>
<tr>
<td><strong>Highest Revenue Per Click</strong></td>
<td>The winner will be determined by which version of the message has generated the most revenue per click. The revenue per click is determined by dividing the conversions by the clicks.</td>
<td>For more information on the conversions and clicks metrics, see Conversions Metric on page 865 and Clicks Metric on page 859.</td>
</tr>
<tr>
<td><strong>Highest Click Through Rate</strong></td>
<td>The winner will be determined by which version of the message has the highest click through rate. For more information on the click through rate metric, see Click Through Rate Metric on page 859.</td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
</tr>
<tr>
<td><strong>Highest Conversion/Delivered Rate</strong></td>
<td>The winner will be determined by which version of the message has the highest conversion/delivered rate. For more information on the conversion/delivered rate metric, see Conversion/Delivered Rate Metric on page 864.</td>
<td>The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.</td>
</tr>
</tbody>
</table>

9. Specify your split groups in the **Split Groups** section.
   a) Enter a name for each group in the **Name** box.
   b) Set the percentage for each group in the **Size** box.

   The contacts in split groups are randomly chosen from your targeted contacts. Here you are only setting the size of those groups, which is a percentage of the whole group.
   c) To add more groups, click **Add Another Group**.

   You can create a maximum of 20 split groups.

For **A/B-Winner** split tests, try to keep the total for your test groups to under 50% of your list. This ensures your winner group will be the largest group. If you plan to use two groups, then 20% and 20% is good choice. Reduce the size of the groups as you add more groups. As you create groups and specify sizes, the **Winner** group is automatically updated to contain the remainder of the percentage.
For Champion/Challenger, there is no Winner group so you need to allocate a full 100% amongst the groups you create.

10. Click Next.

11. Assign the content or time for each split group.

   The options here will vary based on what you selected in step 6. If you choose to test on Full Message Content, you will need to select an alternate message version to use for the test.

12. Click Next.

13. In the Sender Options section, specify the following:

   - From Name - Also called an alias, this is the name that appears to the recipient of the email message.
   - From Address - The email address that your email message will appear from.
   - Reply-To Address - The address that the application will forward email replies to.

14. In the Select Recipients section, select the lists and segments that you would like to send to.

15. In the Delivery Scheduling section, specify when you want the test to go out.

   For an A/B-Winner test, you also need to pick a time for the winner to be sent. The winner will be selected and Bronto will begin delivery preparation at this time. This means there could be a delay of 30-60 minutes from the time you select and when the winning message is sent.

   To ensure the best winner is selected, make sure you give enough time for your contacts to engage with your test messages. If you throttle the message, it may take more time for the message to go out.

   When you specify the lists and segments who will receive your message, remember that the percentage you select for your Split Groups applies to the total number of contacts selected as recipients. For example, you choose 2 lists and 3 segments as recipients. Your test uses 2 Split Groups, each sized at 50%. In this case 50% of the total number of contacts selected as recipients receive Split A, and the other 50% receive Split B. So, if the total number of contacts on the lists and segments you selected as recipients was 100, then that means that 50 contacts received Split A, and the other 50 would receive Split B.

16. Optional: Click Show Advanced Options to view and configure the advanced sending options.
For more information about

- **Email Frequency Caps Override** see Email Frequency Caps Override on page 286.
- **Remails** see Enable Remailing on page 287
- **Report Options** see Receive A Notification When An Email Delivery Completes on page 288
- **Set Delivery Specific Products** see Map Product Placeholders When You Schedule A Message on page 173

17. Click **Next**.

The verification screen is displayed.

18. Double check all of your selections and then click **Send Delivery** to begin the A/B Split test.

**Related Topics**

**Report Metrics** on page 854
This section of documentation lists each individual report metric in Bronto with granular details about every metric.

**Related Topics**

**A/B Split Report Split Groups Metrics** on page 662
The **Split Groups** tab on a split report provides a lists of the split groups associated with the A/B Split test and the high-level metrics associated with each group.

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**Deliveries**

**Outgoing Deliveries And Posts**

The **Outgoing Deliveries** page lets you see all of the deliveries and posts that are currently scheduled to be delivered or posted (i.e. all of your outgoing deliveries or posts).

From this page, you can modify the time of a pending delivery or post, and stop a delivery or post.

**Related Topics**

**View Sent Email Deliveries** on page 1001
The table on the **Email Deliveries** page contains information about the email messages you have sent.

**Delivery Calendar** on page 341
The **Delivery Calendar** is a great way to see when your messages went out in the past, and when your messages are scheduled to go out in the future.

**View The Outgoing Deliveries And Posts In Your Account**

You can get to the **Outgoing Deliveries** page by clicking on the Outgoing link in the left side navigation on the Messages Dashboard.
You can find an explanation of each column displayed in the Outgoing Deliveries table below.

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Message Name: Subject</strong></td>
<td>The Message Name: Subject column displays the name of the email message and the subject line. <strong>Note:</strong> When searching for an email delivery or sorting the Message Name: Subject column, you can only search and sort based on the email message name. You can not search or sort based on the subject. <strong>Note:</strong> If the message was used in a remail delivery, the word <strong>Remail</strong> will appear at the beginning of the subject line. Remails (also know as remarketing) allow you to send a follow-up email to contacts as a reminder or to persuade them to continue along the conversion process.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td><strong>Delivery Type</strong></td>
<td>The delivery Type represents the type of send. Each type is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• <em>Normal</em> - The <em>Normal</em> email delivery type represents a regular email delivery sent to more than one contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Bulk</em> - The <em>Bulk</em> email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Skipped</em> - The <em>Skipped</em> email delivery type represents email messages that were skipped by Bronto and not sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Single Contact</em> - The <em>Single Contact</em> email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as <em>Single Contact</em>, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Test</em> - The <em>Test</em> email delivery type represents email deliveries that were sent as test deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>AMR</em> - The <em>AMR</em> email delivery type represents email deliveries that were sent via an <em>Automated Message Rule</em>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Split Group</em> - The <em>Split Group</em> email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>FTAF</em> - The <em>Forwards to a Friend</em> email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Transactional</em> - The <em>Transactional</em> email delivery type represents email deliveries were sent as transactional emails.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

**Note:** Transactional deliveries are hidden by default. For information on how to show them, see View Transactional Email Deliveries on page 1014.
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Status**  | The Status column indicates the state of the delivery or post. Each status is described below:  
  • *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  • *Partially Sent*  
  • *Canceled*  
  • *Successful* | N/A |
<p>| <strong>Recipients</strong> | The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column. | N/A |</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Send Date** | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  • 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  • 🌮 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |
| **Throttle** | Throttling slows your email delivery speed, and thus spreads your email deliveries out over time. For example, instead of sending your email message to 100K contacts as quickly as possible, throttling will spread the delivery over a period of 8 hours. | Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. The worse your sender reputation is with ISPs, the more likely you are to have a low sender rating in the application. Spreading your email delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender reputation and sender rating than the same 20 complaints received over 15 minutes. |
### Metric/Data

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
</tbody>
</table>

#### Note:
Deleted email deliveries will still be counted as part of the emails sent metric.

---

**Update The Time Of A Pending Delivery Or Post**

You can update the sending date and time of a pending delivery or post by clicking the Update Send Date and Time icon.

To update the send date and time of a pending delivery:

1. Go to Messages > Dashboard.
2. Click Outgoing.
3. Click the Update Send Date and Time icon.
4. Click the calendar icon in the light box that appears. Choose the new send date from the calendar.
5. Use the time pull-down menu to pick a new time for the delivery or post.
6. Click Save.

**Notify Contacts Who Didn't Receive An Email Delivery You Stopped**

You may want to find out the contacts who didn't receive the email message sent via the delivery you stopped. You can do this using a segment. You can use the segment to simply see who didn't receive the email message, or send a new/improved version of the original email message.

If you want to see which contacts actually received the email message from the delivery you stopped, you could do this by changing **Wasn't sent** in Step 8, to **Was sent**. This could be useful if you made a mistake in an email message you sent, stopped the delivery, or wanted to remail a revised version of the email message to contacts who received the incorrect version.

For more information on creating segments, see Segment Builder on page 435.

To notify contacts who didn't receive the email message sent via the delivery you stopped:

1. Go to Tables > Contacts > Segments.
2. Click Create New Segment.
3. Give your segment a name.
4. Click the **Select contacts who match all rules described below** radio button.
5. Choose **On List** from the first pull-down menu in Rule 1.
6. Choose the list that you sent the message to from the second pull-down menu in Rule 1.
7. Click **Create new rule**.
8. Choose **Wasn't sent** from the first pull-down menu in Rule 2
9. Click **Pick** to locate and select the email delivery you stopped.
10. Click **Save Segment**.
    You can now choose to send to that segment in a future delivery.

**Related Topics**

[Segment Builder](#) on page 435
These help topics describe how to use the segment builder.

**View Transactional Deliveries In The Outgoing Deliveries Table**

In tables which display email deliveries, you can show or hide transactional email deliveries.

Note: Transactional deliveries include emails that were sent as transactional, including Forward to a Friend deliveries.

To view transactional deliveries in an email deliveries table:

1. Click **Show Advanced Options**.
2. In the **Delivery Type** section, click the **Transactional** checkbox.

**View A Comparison Report From The Outgoing Deliveries Page**

You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

For more information on comparison reports, see [Comparison Reports](#) on page 756.

To add an item to comparison report:

1. Go to **Messages > Dashboard**.
2. Click **Outgoing**.
3. Click the checkboxes next to the deliveries or posts you want to compare.
    You can compare a total of six deliveries or posts.
4. Click **Compare**.
    The comparison report is displayed.
5. Provided you have less than six items added to the comparison report, you can add additional items to compare by clicking
   - Add Delivery
   - Add Message
   - Add Automated Message
   - Add Delivery Group
Fix A Link In A Sent Or Scheduled Message

You can use link repair to change a link in a delivery that has already been scheduled.

Link repair is accessed from the **Clicks** tab on a **Delivery Report**. When you repair a link, the link is updated in:

- All previously sent deliveries of the message.
- Deliveries that are in the process of sending.
- Deliveries that were scheduled to send before the link was repaired.

When a contact clicks on the repaired link in a message that meets one of these criteria, they are sent to the new, updated URL. However, the link is not repaired in the content of the message itself. If you want the link to be updated in future message deliveries you will need to update the link in the original message content. To do this quickly, click **Edit Message** in the link repair confirmation window to open the message in a message editor, where you can make the appropriate changes.

For example, you sent a message with a link to **www.googel.com**. To fix this, go to a delivery report related to that message and update the link to **www.google.com**. Now when a contact clicks on the repaired link from their inbox, the link automatically resolves correctly to Google.

You might also want to use link repair if your destination page contains unforeseen errors or is not available to visitors at the time of send.

1. Go to **Messages > Deliveries**.
2. Locate the delivery for the message that contains the link(s) you want to update and click the delivery report icon associated with that delivery.
   
   You can use any delivery of a message. The delivery report is displayed.
3. Click the **Clicks** tab.
4. Scroll to the list of links at the bottom of the page.
5. Locate the link you want to change and click the pencil icon.
6. Edit the URL in the **Edit Live URL** box to the correct URL.
   
   **Note:** If there are multiple instances of the same broken URL, you only need to edit one in order to fix all instances of duplicate broken links.
7. Click **Apply**.
   
   A notification that provides an opportunity to edit the link in the original message is displayed.
8. Click
   
   - **OK** to dismiss the message.
   - **Edit Message** to open the message in a message editor. Once open, you can update the link in the message content.

Stop A Delivery Or Post

Deliveries or posts which have yet to be sent or are in the process of sending can be stopped on the **All Deliveries** page.

To stop a delivery or post from the **All Deliveries** page:

1. Go to **Messages > Deliveries**.
2. Click the checkbox next to the delivery or post you want to stop.
Send Note: By default, email deliveries are shown. Click Twitter, SMS, or Facebook to view Twitter, SMS, or Facebook deliveries or posts.

3. Click Stop Delivery.

Schedule A Delivery Of An SMS or MMS Message

To schedule a delivery of an SMS or MMS message:

1. Go to Messages > Messages.
2. Click on SMS.
3. Click on the name of the SMS or MMS message you want to send.
   The SMS Message page opens.
4. Under Schedule Delivery:
   a) Select the Regular radio button.
   b) Click Schedule.
   The Schedule SMS Message page opens.
5. In the Select Recipients section, click the checkbox next to the name of subscription based SMS keyword(s) you want to send to.
   The application ensures that contacts will only receive a single version of an SMS or MMS message, even if they are on more than one keyword.
   For more information on subscription based keywords, see SMS Subscription Keywords on page 259.
6. Optional: To map a product to a product placeholder for this SMS or MMS delivery:
   a) Click Show Advanced Options.
   b) Under Set Delivery-specific Products, click Add Placeholder.
   c) Enter the placeholder you use in your product tag(s) in the Product Placeholder box.
      Only enter one placeholder here. If you need to map multiple placeholders, complete this set of steps multiple times.
   d) Enter the product ID for the product you want to use for the related product tags in the Delivery Specific Product ID box.
7. Optional: To further limit which subscribers will receive the message:
   a) Under Eligible Recipients, click either the Segments, Keywords, or Lists tab.
      You should select the tab the corresponds to the category you want to use to filter contacts.
   b) Select the boxes for the segments, lists, or keywords you want to receive the SMS or MMS.
      When you do this, only contacts who are both part of the group(s) you selected and subscribe to the selected SMS keyword(s) will receive this message. Contacts who subscribe to the keyword but are not part of the Eligible Recipients groups will not receive the SMS or MMS.
8. Optional: To exclude subscribers from receiving the message:
   a) Under Ineligible Recipients, click either the Segments, Keywords, or Lists tab.
      You should select the tab the corresponds to the category you want to use to filter contacts.
   b) Select the boxes for the segments, lists, or keywords you want to exclude from receiving the SMS od MMS.
      When you do this, any contacts who are both part of the group(s) you selected will not receive this message even if they subscribe the indicated SMS keywords.
9. In the Delivery Scheduling section, select when to send the SMS or MMS message. You can select:
   • Send message now
   • Send at a specific time
10. If you selected **Send at a specific time**: Use the date and time picker to select the date and time you want to send the SMS or MMS.

11. Click **Schedule Delivery**

**Related Topics**

SMS Integration Settings on page 1279
The SMS integration allows you to view the SMS short code for your account and to view and configure the STOP and HELP responses your contacts will receive.

View SMS on page 987
You can view a list of all of your SMS messages from the Messages > Messages page, or click on the name of any SMS or MMS message in the SMS table to view the SMS Message Overview page.

**Send Test SMS or MMS Messages**

Before you send an SMS or MMS message, you might want to send a test message to an account or accounts that you use for testing.

Make sure any number you test with is already in your account and is associated with an active contact.

To schedule a test SMS message:

1. Go to Messages > Messages.
2. Click on the name of the SMS or MMS message you want to send.
   
   The SMS Message page opens.
3. Under Schedule Delivery:
   a) Select the Test radio button.
   b) Click Schedule.
4. Optional: You can send to specific mobile numbers by adding the numbers to the SMS Message Recipients text box.
   
   Multiple mobile numbers can be separated with new lines or commas.
   
   Any new mobile number added in the SMS Message Recipients text box will be added as a transactional contact. To add the mobile number as an active contact, add it to your account before you send the test SMS message.
   
   Note: Tracking for test SMS messages will not be included in the aggregate tracking for the message.
5. Optional: In the Select Recipients section, click the checkbox next to the name of subscription based SMS keyword(s) you want to send to.
   
   The application ensures that contacts will only receive a single version of an SMS message, even if they are on more than one keyword.
6. Optional: To map a product to a product placeholder for this SMS or MMS delivery:
   a) Click Show Advanced Options.
   b) Under Set Delivery-specific Products, click Add Placeholder.
   c) Enter the placeholder you use in your product tag(s) in the Product Placeholder box.
      
      Only enter one placeholder here. If you need to map multiple placeholders, complete this set of steps multiple times.
   d) Enter the product ID for the product you want to use for the related product tags in the Delivery Specific Product ID box.
7. In the Delivery Scheduling section, select when to send the SMS or MMS message. You can select:
   - Send message now
   - Send at a specific time
8. If you selected **Send at a specific time**: Use the date and time picker to select the date and time you want to send the SMS or MMS.

9. Click **Schedule Delivery**

**Delete An SMS Message**

You cannot delete SMS messages if they are being used in an active workflow.

To delete an SMS message:

1. Go to **Messages > Messages**.
2. Click **SMS**.
3. Click the checkbox for the SMS message you want to delete.
4. Click the **Delete** button. The confirmation window is displayed.
   - **Note**: If the SMS is being used in a workflow, you will see a message that the SMS message cannot be deleted instead.
5. Click **Delete**.

If you want to delete an SMS that is related to active workflows, you can remove the SMS message from the workflows and then try to delete the SMS message again.

**Add An SMS Message To A Delivery Group**

Messages and deliveries are not the same thing. To read about how they are different, see **Messages**.

To add an SMS message to a delivery group from the **SMS Message Overview** page:

1. Go to **Messages > Messages**.
2. Click **Add To Delivery Group**.
3. To add an SMS message to
   - An existing delivery group, click the **Existing Delivery Group** radio button and then choose a delivery group from the pull-down menu.
   - A new delivery group, click the **New Delivery Group** radio button and then give the new delivery group a name.
4. Click **Save**.

**Related Topics**

**Messages**

---

**Post Twitter**

Posting to Twitter allows you to post a Twitter message (aka a “Tweet”) to any Twitter account you have integrated with.

To post a message to Twitter:

1. Go to **Messages > Messages**.
2. Click on **Twitter**.
3. Click on the name of the Twitter message you want to post.
4. Click **Schedule**.
If you don't see a schedule button, then your message has not been approved for sending. For more information on granting or requesting message approval, see Grant Or Request Message Approval on page 294.

5. Take a look at the preview and make sure everything looks ok with your message before continuing on.

6. In the Post To The Following Twitter Account(s) section, select which Twitter account you want to post to.

It is possible to setup posting for more than one Twitter account. For more information on setting up posting with a Twitter account, see Set Up Your Account So You Can Post To Twitter on page 1285.

7. In the Schedule Post section, select when to post the message. You have two options:
   - Post to Twitter now - This option will post to Twitter now.
   - Post to Twitter at a specific time - This option allows you to pick a specific date and time to post to Twitter. Use the date and time picker to choose the specific date and time.

8. Click Save.

Related Topics
Set Up Your Account So You Can Post To Twitter on page 1285
Integrating your account with a Twitter account allows you to post to Twitter.
Create Twitter on page 250
View Twitter on page 978

Edit A Twitter Message

You can edit a Twitter message from the from the Twitter Messages Overview page, by clicking Edit in the top right of the page.

If you forget to save a message or your computer crashes, you will still be able to access the version of the message you were working on. The Drafts folder is automatically created for you.
Delete A Twitter Message

If you want to delete a Twitter message, click **Delete** in the top right of the **Twitter Message Overview** page.

Add A Twitter Message To A Delivery Group

To add a Twitter message to a delivery group from the **Twitter Message Overview** page:

1. Click **Add To Delivery Group**.

2. To add a Twitter message to
   - An existing delivery group, click the **Existing Delivery Group** radio button and then choose a delivery group from the pull-down menu.
   - A new delivery group, click the **New Delivery Group** radio button and then give the new delivery group a name.

3. Click **Save**.

Post Facebook

Posting to Facebook allows you to post a Facebook message to the wall of any Facebook account you have integrated with.

To post a Facebook message:

1. Go to **Messages > Messages**.
2. Click on **Facebook**.
3. Click on the name of the Facebook message you want to post.
4. Click **Schedule**.
If you don't see a schedule button, then your message has not been approved for sending. For more information on granting or requesting message approval, see Grant Or Request Message Approval on page 294.

5. Take a look at the preview and make sure everything looks ok with your message before continuing on.

6. In the Post To The Following Facebook Wall(s) section, select which Facebook account's wall or page you want to post to.

   It is possible to set up posting for multiple Facebook accounts. For more information on setting up Facebook posting, see Set Up Your Account So You Can Post To Facebook on page 1287.

7. In the Delivery Scheduling section, select a date and time to post the message. You can choose:
   - Post to Facebook now - This option will post to Facebook now.
   - Post to Facebook at a specific time - This option allows you to pick a specific date and time to post to Facebook. Use the date and time picker to choose the specific date and time.

8. Click Save.

Related Topics
Set Up Your Account So You Can Post To Facebook on page 1287
Integrating your account with a Facebook account allows you to post messages to Facebook.
Create A Facebook Message on page 251
View Facebook on page 982

Edit A Facebook Message

You can edit a Facebook message from the Facebook Messages Overview page, by clicking Edit Message.
Note:

If you forget to save a message or your computer crashes, you will still be able to access the version of the message you were working on. The Drafts folder is automatically created for you.

Delete A Facebook Message

If you want to delete a Facebook message, click Delete in the top right corner of the Facebook Message Overview page.

Add A Facebook Message To A Delivery Group

Note: Messages and deliveries are not the same thing. To read about how they are different, see Messages.

To add a Facebook message to a delivery group from the Twitter Message Overview page:

1. Click Add To Delivery Group.

2. To add a Facebook message to
   - An existing delivery group, click the Existing Delivery Group radio button and then choose a delivery group from the pull-down menu.
   - A new delivery group, click the New Delivery Group radio button and then give the new delivery group a name.

3. Click Save.

Delivery Calendar

The Delivery Calendar is a great way to see when your messages went out in the past, and when your messages are scheduled to go out in the future.
There are two different ways to get to the full Delivery Calendar.

From the Home Dashboard

On the Home Dashboard, you will notice that there is a smaller version of the Delivery Calendar displayed. To get to the full versions of the Deliveries Calendar, click the Full Calendar link.

![Delivery Calendar for June 2015](image)

**Note:** For days with a delivery scheduled, you can mouse over the date to see more information about the deliveries scheduled for that day. If you click on the name of a delivery, you will be taken to the Message Overview page for that delivery.

From the Messages Dashboard

From the Messages Dashboard, you can click the Calendar link on the right side of the page to view the full Delivery Calendar.

![Calendar: June 2015](image)
**Related Topics**

Outgoing Deliveries And Posts on page 327

The Outgoing Deliveries page lets you see all of the deliveries and posts that are currently scheduled to be delivered or posted (i.e. all of your outgoing deliveries or posts).

**Related Topics**

View Sent Email Deliveries on page 1001

The table on the Email Deliveries page contains information about the email messages you have sent.

**View The Full Delivery Calendar**

The full Delivery calendar is packed full of useful information about past and future deliveries. On days that have deliveries scheduled on them, you will notice either a regular dot ●, or a dot with small arrows inside of it ☿. The regular dot represents regular deliveries of a message and the dots with small arrows inside represent deliveries sent as part of an automated message rule.

![Delivery Calendar](image)

**Note:** The color of the dots depends on the campaign that the delivery is associated with. For more information on campaigns, see The Campaigns Overview help topic linked to at the bottom of this page.

**Delivery Calendar Icons**

Below is a description of each of the icons that appear on the mini and full Delivery Calendars.

- ● or ☿ Regular Delivery - The envelope icon represents a regular delivery on the mini calendar. If more than one delivery is occurring on an individual day, you can move your mouse over the regular delivery icon on the
mini calendar to reveal the rest of the deliveries scheduled for that day. The dot represents a regular delivery on the full calendar. You will notice the dots are different colors. The colors correspond to the campaign that the delivery belongs to.

- **A/B Split Test Delivery** - Represents a delivery sent as part of an A/B split test.
- **Automated Message Delivery** - The envelope icon represents a delivery sent as part of an Automated Message Rule on the mini calendar. The dot represents a delivery sent as part of an Automated Message Rule on the full calendar. You will notice the dots are different colors. The colors correspond to the campaign that the delivery belongs to.
- **Test Delivery** - The envelope icon with test on it represents a test delivery on the mini calendar.

**Tip:** For more information on sending test messages, see Message Testing Program.

- **View Report** - You can click this icon to view a report for a delivery.
- **View Comparison Report (A/B split deliveries only)** - You can click this icon to view a comparison report for a delivery made as part of an A/B split test.
- **Subscribe to iCal** - Allows you to subscribe to a feed of your calendar.
- **The Current Day** - Marks the current day on the mini Delivery calendar.

### View Deliveries Per Day And Month On The Delivery Calendar

To view all the deliveries for a particular day, click on the number associated with that day.

You are then shown all the deliveries sent or scheduled for that day. You can click the Back to Calendar link to return to the full Delivery Calendar.

**Deliveries For:** September 9th, 2010

**ExampleDelivery** Subject: (Generated by Dynamic Content)
3 Sent / 33.3% Open Rate / 100.0% Click Rate / 100.0% Conversion Rate
Message Sent: 5:23am — [View Report]

**DeliveryA** Subject: Just me or?
2 Sent / 100.0% Open Rate / 100.0% Click Rate / 0.0% Conversion Rate
Message Sent: 7:55am — [View Report]

**DeliveryB** Subject: Link test is our test
6 Sent / 83.3% Open Rate / 40.0% Click Rate / 0.0% Conversion Rate
Message Sent: 12:06pm — [View Report]

**Test Delivery** Subject: Just me or?
3 Sent / 50.0% Open Rate / 0.0% Click Rate / 0.0% Conversion Rate
Message Sent: 12:09pm — [View Report]

**DeliveryC** Subject: (Generated by Dynamic Content)
1 Sent / 0.0% Open Rate / 0.0% Click Rate / 0.0% Conversion Rate
Message Sent: 2:16pm — [View Report]

To toggle between viewing different months, you can click the left and right arrows on the full Delivery Calendar.
Create A Note On The Delivery Calendar

You can create a note on the mini calendar by clicking Add Note, or on the full delivery calendar by clicking Create New Note.

To create a note on the delivery calendar:

1. Click
   • Create New Note from the full
   • Add Note from the mini calendar
2. Specify a title for the note in the Title text box.
3. Pick the date that the note will appear by clicking on the calendar icon.
   If you wish to pick a specific time of day for the note, uncheck the All Day Event checkbox and pick a specific time from the pull-down menu that appears.
4. If needed, type in text for the note in the Note text box.
5. Click Save.
   A note icon will appear on both the full and mini calendars.

Subscribe To/Download Your Calendar Feed

You can click the Subscribe button on the full calendar, or the iCal button on the mini calendar to download the events that appear on your calendar.

To subscribe to your calendar feed:

1. Right click, or Ctrl + click, on the Subscribe or iCal button.
2. Select Copy link address.
3. Open the Calendar app on your computer.
4. Go to File > New Calendar Subscription.
5. Paste the link address you copied from the BMP into the Calendar URL box.
6. Click Subscribe.
   A new window opens where you can configure your subscription settings.
7. Choose the desired setting.
   For example, you can change the calendar name, calendar color, and update frequency.
8. Click OK.
   The existing calendar events are pulled into your calendar and future events are added as the calendar is automatically updated.

Automate

Automation Knowledge Base topics explain how to build, activate, and use workflows and automated message rules. While Bronto offers both workflows and AMRs, we recommend using workflows for your automation needs. Workflows are a combination of trigger, filter, and action nodes that are related to each other, and configured in, a
Workflow builder. The nodes and their settings determine what a workflow will do after it is activated. Typical use cases for workflows are automating contact management and sending activities.

**Workflows**

Workflows allow you to automate steps of a multi-channel marketing life-cycle by specifying combinations of triggers, filters, and actions that determine how to handle contact data and what marketing communications to send.

Creating workflows is a simple process that involves dragging combinations of nodes (triggers, filters, and actions) on to the workflow canvas to automate certain marketing actions. The key to understanding workflows is to remember that they are centered around contacts. Contacts enter and move through workflows based on their actions or data about them. At the end of the workflow, some action is taken in regards to a contact (they are sent a message, their data is updated, etc.).

**CAUTION:** If a workflow results in an email being sent, that email cannot be used to trigger another workflow. This limitation is meant to prevent a workflow from entering a loop where it can never be completed.

**Related Topics**

- Video: Create Workflows
- View All The Workflows In Your Account on page 1026

This topic describes all of the columns in the **Workflows Overview** table.

**Workflow Builder**

The workflow builder is the canvas you use to connect and configure nodes in order to create and edit workflows.

The workflow builder is comprised of four main parts:

- The canvas
- Nodes
- Node settings
- Node connections

A node is a collection of settings that control a particular aspect of a workflow. There are three kinds of nodes used in workflows:

- **Triggers** - Triggers nodes represent events that occur in your account which kickoff (or start) a workflow.
- **Filters** - Filter nodes allow you to alter a workflow based on whether certain events or actions occur.
- **Actions** - Action nodes represent nodes that perform an action (send email, update field information, change list membership, etc.) when a contact reaches them in a workflow.

The basic premise for building a workflow is:

1. Drag nodes on to the canvas.
Note: All workflows must begin with a Trigger node and can only contain one Trigger node.

2. Draw connections between each node.

3. Specify the settings for each node.

4. Test the workflow.

5. Activate the workflow.

Add Nodes To A Workflow

Workflows are made by connecting a series of nodes on the workflow canvas. A node is a collection of settings that control a particular aspect of a workflow. There are three kinds of nodes used in workflows:

- **Triggers** - Triggers nodes represent events that occur in your account which kickoff (or start) a workflow.
- **Filters** - Filter nodes allow you to alter a workflow based on whether certain events or actions occur.
- **Actions** - Action nodes represent nodes that perform an action (send email, update field information, change list membership, etc.) when a contact reaches them in a workflow.

To add nodes to a workflow:

1. Go to Automation > Workflows.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or Create New Workflow to create a new workflow.
3. Move your mouse over a node in the Node Palette.
4. Click on the node and drag it on to the workflow canvas.
Automate

Connect Nodes In A Workflow

After you add nodes to the workflow canvas, you need to connect them. There are two types of node connections, outgoing and incoming. Outgoing connections are represented by a green, orange, or blue circle at the bottom of a node. You can click on one of the outgoing connections, and drag it to a node with an incoming connection to connect two nodes together. Incoming connections are represented by a gray dot at the top of a node.

Note: Trigger nodes only have outgoing connections. Filter and Action nodes have both outgoing and incoming nodes.

To connect nodes in a workflow:

1. Go to Automation > Workflows.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or Create New Workflow to create a new workflow.
3. Assuming nodes have already been added to the workflow canvas, connect nodes by dragging the outgoing connections to nodes with incoming connections as shown below:

4. Optional: To delete a node connection, select a Filter or Action node, and click the X.

Edit A Node's Settings

For more information on the settings available for a specific node, see Workflow Trigger Nodes on page 356, Workflow Filter Nodes on page 366, or Workflow Action Nodes on page 384.

To edit node settings in a workflow:
1. Go to Automation > Workflows.
2. Click either
   • On the name of a workflow to edit an existing workflow
   • Or Create New Workflow to create a new workflow.
3. Edit the node's settings by modifying the bold text in each node.
   Once you have added nodes and node connections to a workflow, you can begin editing settings for each node. When you drag a node on to the canvas, certain text in the node will be bold. Each piece of bold text represents a given node setting. Clicking on the bold text will allow you to change the setting. Node settings are the details for a given node that describe what should happen at that particular point in the workflow. For example, if you add the Email Was Sent node to the workflow canvas, you will then pick a message in your account.
   
   Note: As you edit a node's settings, the bold text shown in the node will be replaced by the values you select for the node settings.

Set A Default Campaign For A Workflow
If you have enabled Campaigns, you will need to set a default campaign to associate with a workflow's deliveries.

When you set a default campaign, all deliveries sent from the workflow will be added to the campaign unless you set a different campaign in a Send Email node. The Send Email node settings will override the workflow settings when a delivery is sent from a node with campaign settings that are different than the default. See Use The Send Email Action Node In Workflows on page 389 for more information.

After enabling campaigns, you will need to set a default campaign for any new workflow you create or for any existing workflow you edit. Existing workflows that you do not edit will continue to work without the default campaign settings. If you set a default campaign for an active workflow, any deliveries in the process of sending will not be associated with the campaign and any deliveries that are triggered after the default campaign is set will be associated with the campaign.

To set a default campaign for a workflow:
1. Go to Automation > Workflows.
2. Click either
   • On the name of a workflow to edit an existing workflow
   • Or Create New Workflow to create a new workflow.
3. Click the button next to the text Default Campaign.
   This text will be None unless a default campaign has already been set for the workflow.
4. To select an existing campaign:
   a) Click on the name of the campaign.
   b) Click Apply.
5. To create and select a new campaign:
   a) Click New Campaign.
   b) Enter a name for the campaign in the Name box
   c) Select a marketing campaign type from the Type list
   d) Enter a Description.
   e) Click Save Changes.
   f) Click Apply.
6. Click Save Changes.

Edit The Name (Label) Of A Workflow Node
You can edit the name (label) of a node when it is used in a workflow. This allows you to more quickly find a node within a workflow, especially in situations where you use the same node several times.

When you change the node name, it is only changed for that instance of the node. The change is not reflected in other nodes of the same type used in the workflow or in the list of nodes on the Node palette. After you have renamed a node, you can see the default node name by hovering over the node label.

To edit the name of a node in a workflow:

1. Go to Automation > Workflows.
2. Click either
   • On the name of a workflow to edit an existing workflow
   • Or Create New Workflow to create a new workflow.
3. Mouse over the heading of a node in the workflow and click the pencil icon.

   The Edit Node: Change Label box is displayed.

4. In the Label box, change the name for the node.
   The maximum length for a node label is 65 characters.
5. Click OK.

Copy And Paste Nodes In A Workflow
You can quickly duplicate nodes within a workflow by copying and pasting them. When you copy a node, all of the current settings for the node are retained including changes to the node's name.

When pasted, the new copied nodes are not automatically connected to any other nodes on the canvas. Nodes can only be pasted into the workflow they were copied from and the trigger node cannot be copied.

To copy and paste nodes in a workflow:

1. Open a workflow in the workflow builder.
2. Click on the node(s) you want to copy.

   To select multiple nodes, either
   • Hold the Shift or Cmd key as you select each node.
   • Drag your cursor over the nodes to select the nodes you want to copy.
3. Click the Copy button.

   As you mouse over the canvas you can now see the outline of the copied nodes. The esc key can be used to exit the copy process without pasting.
4. Click on the location on the workflow canvas you want to place the node.
   The node is added to the canvas. Hook the node into the workflow and use it as normal.

**View Active Contacts On A Workflow Node**

When viewing a workflow, you can see how many active contacts are on any given node in a workflow by looking at the *Active* contact count.

To view the active contacts on a workflow node:

1. Go to **Automation > Workflows**.
2. Click on the name of an existing workflow that has been activated.
   Filter and Action nodes will contain active contact counts. Trigger nodes do not have active contact counts.

   **Note:** Active contacts on a node are contacts moving through that node.

3. Optional: Click the *Active* contacts number to view a table containing the following data about the active contacts on the node:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The email address stored for the contact.</td>
<td>An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on mobile numbers stored in your account. For more information on how to create segments based on mobile numbers, see Create A Segment Based On Contact Mobile Numbers on page 458.</td>
</tr>
<tr>
<td>Facebook</td>
<td>Whether or not the contact's Facebook account is connected.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Twitter</td>
<td>Whether or not a Twitter handle is stored for the contact.</td>
<td>Storing a person's Twitter handle opens up the possibility for another channel of communication.</td>
</tr>
<tr>
<td>Activated Progression</td>
<td>Indicates when the contact arrived on the workflow node.</td>
<td>Using the date shown in the Activated Progression column, you can see how long a contact has been on a node. You can also use this data to determine how much longer a contact will remain on a node if you are using the Delay action node.</td>
</tr>
</tbody>
</table>

**View Processed Contacts On A Workflow Node**

When viewing a workflow, you can see how many contacts have been processed by a given node by looking at the **Processed Contacts** count. Processed contacts on a node represent all contacts who have ever entered the node. If a contact enters a node 3 different times, the number of processed contacts will go up by 3.

When viewing the processed contacts on an Action node, the processed contacts metric is an accurate reflection of how many times the action was triggered, but does not necessarily indicate that the triggered action was successful. This is especially important for the Action nodes which send email, SMS, or post to Twitter or Facebook.

In the case of these nodes, a delivery or post could get triggered, but then get skipped. For example, an email delivery may get triggered and then get skipped if it exceeds the email allocation for the account or if you don't have permissions to send to that contact. To see how many emails were successfully delivered, you can view the report for the workflow, or the report for the message selected in the node.
To view the processed contacts on a workflow node:

1. Go to Automation > Workflows.
2. Click on the name of an existing workflow that has been activated.

   Filter and Action nodes will contain processed contact counts. Trigger nodes do not have processed contact counts.

**Save A Workflow**

If you save a workflow that is incomplete or not valid, a warning will be shown to you. Your work will be saved, but you'll need to update and or complete the workflow in order to activate and begin using the workflow.

To save a workflow:

1. Go to Automation > Workflows.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or Create New Workflow to create a new workflow.
3. Make changes to your workflow.
4. Click
   - Save Changes to save the current version of the workflow and continue editing.
   - Save & Close to save and close the workflow.

**Edit The Name And Description For A Workflow**

**Example Workflow: My Workflow**

To edit the name and description of a workflow:

1. Go to Automation > Workflows.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or Create New Workflow to create a new workflow.
3. Click on the name of the workflow.
   - If no name has been set, click the text New Workflow.
4. In the Name text box, add a name for the workflow.
5. In the Description text box, add a description for the workflow.
6. Click Done.

**Edit The Contact Throttling Settings In A Workflow**

The contact throttling settings in a workflow allow you to adjust how many times a contact can enter a workflow.

When this is set it only applies to the current workflow. If a contact is on multiple workflows this will not impact their eligibility for any other workflows.
To edit the contact throttling settings for a workflow:

1. Go to Automation > Workflows.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or Create New Workflow to create a new workflow.
3. Click the button next to the text Contact Throttling.
4. The available contact throttling settings are shown at the bottom of the pop-up. You can select:
   - Allow contacts to enter the workflow an unlimited number of times, even if the contact is already on the workflow.
   - Do not allow any additional contacts into the workflow. All contacts currently progressing through the workflow will continue to completion.
   - Limit the number of times a contact may simultaneously be on this workflow to X number of time(s).
   - Limit the number of times a contact may enter the workflow to X number of time(s) in a given time frame.
5. If you selected Limit the number of times a contact may simultaneously be on this workflow to X number of time(s) or Limit the number of times a contact may enter the workflow to X number of time(s) in a given time frame:
   a) Click a number of times
   b) Add a number in the text box.
6. If you selected Limit the number of times a contact may enter the workflow to X number of time(s) in a given time frame:
   a) Click a number of time frame(s)
   b) Select one of the following from the pull-down menu:
      - Minutes
      - Hours
      - Days
      - Weeks
      - Months
      - Years
7. Click Save Changes.

Increase The Size Of The Workflow Canvas

To increase the size of the workflow canvas:

1. Go to Automation > Workflows.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or Create New Workflow to create a new workflow.
3. Optional: You can hide the top-level navigation. To do this, click Hide Navigation in the top right corner of the page.
4. Optional: You can hide the workflow toolbar. To do this, click the pin icon.
When the pin icon is clicked, it will turn white and the workflow toolbar will disappear when your mouse is not over the gray area on the right side of the page.

**Use The Workflow Clean Up**

Organize your workflow nodes into a clean flow chart.

1. Go to **Automation > Workflows**.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or **Create New Workflow** to create a new workflow.
3. Make changes to your workflow.

4. Click the wand icon ☭ to transform your workflow into an organized chart.

5. Click **Save Changes** or **Save & Close**.

**Use The Workflow Zoom**

The workflow zoom feature allows you to zoom in and out on the workflow canvas.

To use the workflow zoom:

1. Go to **Automation > Workflows**.
2. Click either
   - On the name of a workflow to edit an existing workflow
• Or **Create New Workflow** to create a new workflow.

3. Click the zoom toggle to zoom in and out.

If you hover over a node in the zoomed out view, you can view details about the node. When you hover over a node, you can click the pencil icon to edit the options for the node.

When you are done editing a node's options, you can click **Shrink Node** to return the node to the zoomed out view.

**Workflow Trigger Nodes**

Triggers nodes represent events that occur in your account which kickoff (or start) a workflow.
Each workflow can only have one trigger node. This table describes all possible trigger nodes and provides links to the topics for using each individual node.

<table>
<thead>
<tr>
<th>Node Name</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Is Added</td>
<td>Begins a workflow when a contact is added to your account, and optionally when their status changes from Transactional to Onboarding or Active.</td>
<td>You could use this node to trigger a welcome message for a new contact.</td>
</tr>
<tr>
<td>Contact Field Updated</td>
<td>Begins a workflow when a specific field value is updated and compared to a value you choose.</td>
<td>If you track rewards points, you could use this node to send a reward message when the field hits a certain value, like 500 points.</td>
</tr>
<tr>
<td>Email Is Sent</td>
<td>Begins a workflow when a specific message is sent.</td>
<td>You could use this node during a re-engagement campaign. If you have a large group of contacts to send a series of re-engagement messages to, and you send the first message to the groups manually, you can use this node to send the subsequent messages in the series automatically.</td>
</tr>
<tr>
<td>List Membership Change</td>
<td>Begins a workflow when a contact is either added to, or removed from a list.</td>
<td>If a contact opts in to receive information about a contest, you can use this node to trigger a specific email for that contest.</td>
</tr>
<tr>
<td>Segment Membership Change</td>
<td>Begins a workflow when a contact is added to, or removed from a segment.</td>
<td>If a contact has not opened the last 30 messages you have sent, you can use this node to start a re-engagement campaign series.</td>
</tr>
<tr>
<td>Webform Event</td>
<td>Begins a workflow when a Webform is viewed or submitted.</td>
<td>If a contact updates their preferences in a webform, you could use this node to send them a thank you message.</td>
</tr>
<tr>
<td>Twitter Event</td>
<td>Begins a workflow when a mention of a Twitter username stored in your account occurs.</td>
<td>You can use this node if you want to send a standard tweet to anyone that mentions your tracked Twitter handle.</td>
</tr>
<tr>
<td>Initial Incoming SMS With Keyword</td>
<td>Begins a workflow when an initial SMS is received with a specific keyword, or a contact subscribes to a specific keyword.</td>
<td>You could use this node to send specific content to a contact that has sent a specific keyword to your account.</td>
</tr>
<tr>
<td>Received API Event</td>
<td>Begins a workflow when an API event with this workflow's keyword is received.</td>
<td>If a contact has been updated through a 3rd party API, you could use this node to trigger a welcome message. addContactstoworkflow API call</td>
</tr>
<tr>
<td>Cart Is Abandoned</td>
<td>Begins a workflow when a shopping cart is abandoned.</td>
<td>If a customer abandons their shopping cart, you can use this node to start a cart recovery series.</td>
</tr>
<tr>
<td>Node Name</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Order Is Added</td>
<td>Begins a workflow when a contact completes an order.</td>
<td>If a contact places an order, you can use this node to send them a thank you message or a request to review the product they purchased.</td>
</tr>
<tr>
<td>Order Is Shipped</td>
<td>Begins a workflow when the order state for an order is updated to shipped.</td>
<td>You can use this node to send the contact a shipping confirmation message.</td>
</tr>
</tbody>
</table>

**Use The Contact Is Added Trigger Node In Workflows**

The Contact Is Added trigger node begins a workflow when a contact is added to your account. You can also set the node to trigger when an existing contact's status changes from *Transactional* to *Onboarding* or *Active*.

There are several reasons you may want to use this node. It could be used to trigger a workflow that automatically sends new contacts through the onboarding process. The node can be used to trigger a welcome series workflow, to move contacts to lists, or to send new contacts email that contain links to a manage preferences webform in order to collect additional information.

A contact's status determines the type of message they can be sent. For information on the different contact statuses, see [Contact Status](#) on page 1083. Contacts that have a transactional status can only be sent transactional emails.

When a new transactional contact is added to your account, they will be added to any workflow that starts with the Contact Is Added trigger node, but cannot be sent marketing messages that are included in the workflow. In this case, the contact will remain in the workflow unless you use a filter node to send the contact down a different path. If you:

1. Don't filter transactional contacts from the workflow
2. And have the Contact Is Added node set to trigger when an existing contact's status changes from *Transactional* to *Onboarding* or *Active*
3. When an existing transactional contact changes to onboarding or active status, the contact will be added to the workflow a second time. Also, due to the status change, the contact will be able to move forward in the workflow instead of being stuck.

If a contact is in the workflow more than once, they might be sent duplicate messages. Therefore, when a workflow that sends marketing messages starts with the Contact Is Added node, make sure you either filter out new contacts that have a transactional status or set "change from *Transactional* to *Onboarding* or *Active*" to "will not be included".

To use the Contact Is Added trigger node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Contact Is Added trigger node on to the workflow canvas.
3. Click the following text in the Contact Is Added trigger node: will.
4. Select whether or not contacts whose status is changing from *Transactional* to *Onboarding* or *Active* will be included in the workflow. You can select:
   - **will** (default) to trigger when the status of existing transactional contacts change.
• will not to ignore contacts when their statuses transition from Transactional to Onboarding or Active.

When a contact's status changes from Transactional to Onboarding or Active, they are eligible to receive marketing and transactional emails. Therefore, you might want to set this to will for workflows that send marketing materials a contact wasn't able to receive when they were added to your account as a transactional contact.

When you set this to will, make sure that you filter out transactional contacts when they are added to your account. Otherwise, you could have the same contact in a workflow more than once, which would cause them to receive duplicate emails. For example, you can create a segment of transactional contacts and use the Segment Membership filter node to filter out transactional contacts.

5. Click Done

Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.

Contacts with a status of Active are contacts that can receive emails from you.

Use The Contact Field Updated Trigger Node In Workflows
The Contact Field Updated trigger node begins a workflow when a specific field value is updated and compared to a value you choose.

To use the Contact Field Updated trigger node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Contact Field Updated trigger node on to the workflow canvas.

3. Click the following text in the Contact Field Updated trigger node: a contact field.

4. In the pop-up window, click on the name of the field that when updated and compared to a specific value, will trigger the workflow.

The custom fields you have created in your account are shown by default. Click the Show Default Fields radio button to select the default fields in your account. You can select the following default fields:

• Average Order Value
• Created
• Email
• Email Preference
• Facebook User ID
• First Order Date
• Last Click Date
• Last Delivery Date
• Last Modified
• Last Open Date
• Last Order Date
• Last Order Revenue
• Mobile Browser
Automate

- Mobile Email Client
- Mobile Number
- Operating System
- Primary Browser
- Primary Email Client
- Source
- Total Orders
- Total Revenue
- Twitter User ID

5. Click **Select**.
6. Click the following text in the Contact Field Updated trigger node: **is equal to**.
7. From the pull-down menu, choose how you want to compare (i.e. the operator) the value contained in the field with value you specify.

   The operators you can choose in the field comparison pull-down menu change depending on the type of data stored in the field you selected. For example, if you choose a field that stores dates, then the field comparison menu will contain operators that are relevant for comparing dates. For a detailed explanation of the different field operators and their accepted values, see Field Data Types.

8. Click **Done**.
9. Click the following text in the Contact Field Updated trigger node: **a new value**.
10. Specify a value that the updated value in the field will be compared against to trigger the workflow.

   The allowed values will differ depending on the type of field you choose. For a detailed explanation of the different field operators and their accepted values, see Field Data Types.

### Use The Email Is Sent Trigger Node In Workflows

The Email Is Sent trigger node begins a workflow when a specific message is sent.

![Email Is Sent](image)

To use the Email Is Sent trigger node:

1. Create a new workflow or edit an existing workflow.

   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.

   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Email Is Sent trigger node on to the workflow canvas.
3. Click the following text in the Email Is Sent trigger node: **an email**.
4. From the pop-up window, click on the name of the email message that when sent, will trigger the workflow.
5. Click **Select**.

### Use The List Membership Change Trigger Node In Workflows

The List Membership Change trigger node begins a workflow when a contact is either added to, or removed from a list.
To use the List Membership Change trigger node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the List Membership Change trigger node on to the workflow canvas.

3. Click the following text in the List Membership Change trigger node: added to.

4. From the Membership Action pull-down menu, choose a list membership action. The available list membership actions are:
   - Added To
   - Removed From

5. Click Done.

6. In the List Membership Change trigger node, click a list.

7. From the pop-up window, click on the name of the list that a contact needs to be either added to, or removed from in order to trigger the workflow.
   
   Tip: You can click Create New List to create a new list without having to navigate away from the workflow.

8. Click Select.

Use The Segment Membership Change Trigger Node In Workflows

The Segment Membership Change trigger node begins a workflow when a contact is added to, or removed from a segment.

Note: Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

To use the Segment Membership Change trigger node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Segment Membership Change trigger node on to the workflow canvas.

3. Click the following text in the Segment Membership Change trigger node: added to.

4. From the Segment Membership Action pull-down menu, choose a segment membership action. The available segment membership actions are:
   - Added To
5. Click **Done**.

6. Click the following text in the Segment Membership Change trigger node: **a segment**.

7. From the pop-up window, click on the name of the segment that a contact needs to be either added to, or removed from in order to trigger the workflow.

8. Click **Select**.

### Use The Webform Event Trigger Node In Workflows

The Webform Event trigger node begins a workflow when a Webform is viewed or submitted.

![Image of Webform Event trigger node](image)

**Warning:** You will need to upgrade to using new webforms in order to use the Webform Event trigger. To upgrade to new webforms, go to **Content > Webforms** and click **Learn About New Webforms**. From here, click **Switch Me To New Webforms**. For more information on creating new webforms, see **Create Webforms**.

For more information on Webforms, see **Webforms**.

To use the Webform Event trigger node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.
   
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Webform Event trigger node on to the workflow canvas.

3. Click the following text in the Webform Event trigger node: **a webform**.

4. From the pop-up window, click on the name of the webform that must be either viewed or submitted in order to trigger the workflow.

5. Click **Select**.

6. Click the following text in the Webform Event trigger node: **submitted**.

7. From the Webform Action pull-down menu, choose a webform action. The available webform actions are:
   
   - Viewed
   - Submitted

8. Click **Done**.

### Use The Twitter Event Trigger Node In Workflows

The Twitter Event trigger node begins a workflow when a mention of a Twitter username (aka handle) stored in your account occurs.

![Image of Twitter Event trigger node](image)

For more information on setting adding Twitter usernames to track in your account, see **Track Twitter Usernames** on page 1286.

To use the Twitter Event trigger node:
1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Twitter Event trigger node on to the workflow canvas.
3. Click the following text in the Twitter Event trigger node: a stored username.
4. From the Twitter Username pull-down menu, choose the Twitter username that when mentioned on Twitter, will trigger the workflow.
5. Click Done.

Use The Initial Incoming SMS With Keyword Trigger Node In Workflows
The Initial Incoming SMS With Keyword trigger node begins a workflow when an initial SMS is received with a specific keyword, or a contact subscribes to a specific keyword. Text-To-Join keywords cannot be used to trigger this node.

Note: Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

Note: When a person texts in to a keyword, the keyword must be the first thing contained in the SMS message they are sending to you. Additional content is allowed, but the keyword must be first.

For more information on creating SMS subscription keywords, see Create SMS Keywords on page 261. For more information on setting up the SMS integration and creating keywords, see SMS Integration Settings on page 1279.

To use the Initial Incoming SMS With Keyword trigger node:
1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Initial Incoming SMS With Keyword trigger node on to the workflow canvas.
3. Click on an initial sms text is received with.
4. From the Initial SMS Activity pull-down menu, select one of the following:
   • An initial SMS text is received with - This option will trigger the workflow when an initial SMS text is received containing a specific keyword.
   • A contact subscribes to - This option will trigger the workflow when a contact subscribes to a specific keyword.
5. Click Done.
6. Click on a specific keyword.
7. In the pop-up window, click the row associated with the keyword you want to use.
   You only select SMS keywords from this list. You cannot use Text-To-Join keywords to trigger this workflow.
8. Click Select.
You can use the Stop SMS Session action node to end an SMS session when a workflow completes. For more information on using the Stop SMS Session action node, see Use The Stop SMS Session Action Node In Workflows on page 393.

**Use The Received API Event Trigger Node In Workflows**
The Received API Event trigger node begins a workflow when an API event with this workflow's keyword is received.

![Received API Event](image)

You can call `addContactEvent` with the keyword specified for the workflow to begin a workflow with the Received API Event Trigger.

To use the Received API Event trigger node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to `Automation > Workflows` and click `Create New Workflow`.
   
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Received API Event trigger node on to the workflow canvas.

3. Click the following text in the Received API Event trigger node: `this keyword`.

4. Type in a keyword in the Keyword text box.

5. Click `Done`.

**Use The Cart Is Abandoned Trigger Node In Workflows**
The Cart Is Abandoned trigger node begins a workflow when a shopping cart is abandoned.

![Cart Is Abandoned](image)

**Important:** This topic only applies to you if you pass either cart or order data from your site into Bronto.

After you have set up Cart Recovery to recognize when a cart has been abandoned, you should configure a workflow to send the contact a message that encourages them to purchase products in the abandoned order. This type of workflow will always start with the Cart Is Abandoned trigger node. The first message you send to a contact in this type of workflow can be transactional and any subsequent emails you might send as part of a series must be transactional.

Before you make a cart abandonment workflow, make sure you have created the emails you want the workflow to use when triggered.

To use the Cart Is Abandoned trigger node:

1. Go to `Automation > Workflows` and click `Create New Workflow`.

2. Drag the Cart Is Abandoned node on to the workflow canvas.

3. Set whether you want previously abandoned carts to be able to enter this workflow:
a) Click **will** or **will not** in the node text.
b) Select
   - **will not** to exclude carts that have previously been abandoned.
   - **will** to allow previously abandoned carts to go through this workflow.
c) Click **Done**.

4. Customize the length of time that you want to have passed since a contact's last order before the contact can enter this workflow:
   a) Click **1 days** in the node text.
   b) Select a unit of time from the **days** list.
   c) Enter the corresponding length of time in the **1** box.
   d) Click **Done**.

Sometimes a contact may abandon a cart on one type of device but order the item on another device or have accidentally placed an item in their cart that was recently ordered. Setting up this type of contact filtering allows you to more carefully target your cart abandonment messages so that contacts do not receive redundant or irrelevant emails.

5. Continue to build your cart abandonment workflow using other filter and trigger nodes.

   For example, you may want to use the Cart Status Filter Node to send contacts down different paths based on the current status of their cart.

**Use The Order Is Added Trigger Node In Workflows**
The Order Is Added trigger node begins a workflow when a contact completes an order.

**Important:** This topic does not apply to you if you are not using the Order Service.

To use the Order Is Added trigger node:

1. Create a new workflow or edit an existing workflow.

   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.

   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Order Is Added node on to the workflow canvas.

3. Optional: To include or exclude orders that were recovered from abandoned shopping carts
   a) Click the following text in the Order Is Added trigger node: **will**.
   b) Select one of the following:
      - **will** to include orders.
      - **will not** to exclude orders.
   c) Click **Done**.

**Use The Order Is Shipped Trigger Node In Workflows**
The Order Is Shipped trigger node begins a workflow when the order state for an order is updated to shipped.

**Important:** This topic does not apply to you if you are not using the Order Service.
Some ways to use the Order Is Shipped node include:

- You can create a workflow that notifies a contact that the order has shipped.
- You can use the Order Is Shipped trigger node with a Delay action node to create a workflow that sends a follow-up message to a contact after they have received an order.

This node is only triggered the first time the order state is updated to shipped. This happens either when the data for the order is imported into Bronto and the imported state is shipped or when the state in Bronto is changed to shipped. If Bronto does not receive the order data the workflow cannot be triggered.

Use contact throttling if you want to limit the number of times a contact will receive an email from this workflow.

To use the Order Is Shipped trigger node:

1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
     - **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Order Is Shipped node on to the workflow canvas.

3. Optional: To send a follow up message after an item has shipped, drag the Delay action node to the canvas.
   - You'll want to set the delay node to an amount of time that is greater than the shipping time so that the message is received after the shipment. For information about how to configure the Delay node see Use The Delay Action Node In Workflows on page 387.

4. Drag the Send Email action node to the canvas.
   - For information about how to configure the Send Email node see Use The Send Email Action Node In Workflows on page 389.

5. Connect the nodes.

6. Save the workflow.
   - The workflow will not trigger an event until you activate it. To activate a workflow, click on the Inactive button to change the status to active.

You can activate a workflow from the workflow's page or the Workflows Overview table.

**Workflow Filter Nodes**

Filter nodes allow you to alter a workflow based on whether certain events or actions occur.

You can use filter nodes to refine the actions of a workflow. For example, you can limit an action to the first 100 people who reply to a contest or to a group of people on a particular list or segment. A workflow can have multiple filter nodes.

This table describes all possible filter nodes and provides links to the topics for using each individual node.
<table>
<thead>
<tr>
<th>Node Name</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Field Comparison</td>
<td>Filters a workflow based on a comparison between the data contained in a field, and a value you specify.</td>
<td>If a contact has abandoned their cart but has placed an order in the last 10 days, you could use this node to choose not to send them an abandoned cart message.</td>
</tr>
<tr>
<td>List Membership</td>
<td>Filters a workflow based on whether a contact is on a specific list.</td>
<td>You could send a contact a different welcome email, filtered by if they got on the list from a pop-up page or check out page.</td>
</tr>
<tr>
<td>Segment Membership</td>
<td>Filters a workflow based on whether a contact is on a specific segment.</td>
<td>If a contact is part of a re-engagement series, you can use this node to filter contacts that have become re-engaged and not send them subsequent messages in the series.</td>
</tr>
<tr>
<td>SMS Keyword Membership</td>
<td>Filters a workflow based on a contact's membership to individual subscription keywords.</td>
<td>You can use this node to send different welcome messages, based on the SMS keyword they are subscribed to.</td>
</tr>
<tr>
<td>Contest</td>
<td>Filters a workflow in a &quot;contest&quot; related manner.</td>
<td>If you are running a contest and want people to refer a friend by forwarding an email, you can use this node and set it so that the first 50 people to forward to a friend will be entered into the contest to win a prize. The rest will be filtered to a no path where they are not entered.</td>
</tr>
<tr>
<td>Interval</td>
<td>Filters a workflow in intervals.</td>
<td>You can use this node to test 2 messages. You can choose the interval, so that after 5 contacts are sent one message, the next contact is sent a different message.</td>
</tr>
<tr>
<td>Email Activity</td>
<td>Filters a workflow based on whether or not a contact opened, clicked on, converted from, or was sent emails.</td>
<td>You could use the Email Activity node to filter contacts based on whether they opened a message that was in a delivery you sent.</td>
</tr>
<tr>
<td>Webform Activity</td>
<td>Filters a workflow based on if a contact submits or views a webform in a specified amount of time.</td>
<td>If you send contacts a message with a form to fill out, you can use this node to filter which contacts have taken the action you requested of them.</td>
</tr>
<tr>
<td>Twitter Activity</td>
<td>Filters a workflow based on whether or not a contact has mentioned a stored Twitter username in your account.</td>
<td>If you are running a contest for Twitter users, you can use this node to capture who enters and then put them on a separate Twitter list.</td>
</tr>
<tr>
<td>SMS Message Activity</td>
<td>Filters a workflow based on if a contact was sent, replied to, or clicked on a link in an SMS message you sent them.</td>
<td>You could use this node to see if contacts are responding to the message you sent in a text and prompt them to respond if they are ignoring the message.</td>
</tr>
<tr>
<td>Node Name</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Email Address Validation</td>
<td>Filters a workflow based on whether or not content from a previous node contained an email address.</td>
<td>You can use this node to see if the SMS message from a contact contained an email address.</td>
</tr>
<tr>
<td>Random</td>
<td>Filters a workflow by sending configurable percentages of contacts down different paths.</td>
<td>You can use this node to perform A/B split tests by sending different messages to different contacts.</td>
</tr>
<tr>
<td>Cart Status</td>
<td>Filters a workflow by sending contacts down different paths based on the status of their shopping cart.</td>
<td>Before you send a cart recovery message, you could use this node to see if the original cart is still abandoned. However, this does not guarantee that the contact did not place an order on another device.</td>
</tr>
<tr>
<td>Cart Phase</td>
<td>Filters a workflow by sending contacts down different paths based on their cart's phase when the cart was abandoned.</td>
<td>You could send a discount email to contacts who abandoned a cart in the billing phase. You can only filter one phase per node, but a single workflow can have multiple Cart Phase filter nodes.</td>
</tr>
<tr>
<td>Cart/Order Field Comparison</td>
<td>Filters a workflow by sending contacts down different paths based on the value of the specified cart or order fields.</td>
<td>You could send a contact an email that offers free shipping when the Shipping Amount in an abandoned cart is less than five dollars. Or you could send an email to contacts that offers a discount when the Total for their last order was greater than 100 dollars.</td>
</tr>
<tr>
<td>Line Item Comparison</td>
<td>Filters a workflow by sending contacts down different paths based on the value of one or more of the items in a cart or order.</td>
<td>If a contact places three items of the same category in a cart then abandons it, you could use this node to send them a message that offers a buy three get one free deal.</td>
</tr>
<tr>
<td>Node Name</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>Date</td>
<td>Filters a workflow based on the current day's relationship to a calendar date you set.</td>
<td>If you run ongoing promotions, you might want to set this node to on or before the date the current promotion ends - let's say June 1, 2017. If the current date is on or before June 1, 2017, then the contact is moved to the connected Yes node, where you can use a Send Email node to send them an email about the current promotion. If the current date is after June 1, 2017, the contact is moved to the corresponding No node, where you can use a Send Email node to send them an email about the next promotion. In this example, after June 1, 2017 the Yes path will never be triggered again. In this situation, you could update the date on the node. You could also string together a series of Date filter and Send Email action nodes when you build the workflow that would keep the workflow up-to-date for the length of the promotion.</td>
</tr>
</tbody>
</table>

**Use The Contact Field Comparison Filter Node In Workflows**

The Contact Field Comparison filter node filters a workflow based on a comparison between the data contained in a field, and a value you specify.

To use the Contact Field Comparison filter node:

1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
     - **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Contact Field Comparison filter node on to the workflow canvas.
3. Click the following text in the Contact Field Comparison filter node: field.
4. In the pop-up window, click on the name of the field whose value you want to compare against a value you define.

   The custom fields you have created in your account are shown by default. If you want to select Bronto default fields, click the Show Default Fields radio button to see them. You can select the following default fields:
   - Average Order Value
   - Created
   - Email
   - Email Preference
   - Facebook User ID
• First Order Date
• Last Click Date
• Last Delivery Date
• Last Modified
• Last Open Date
• Last Order Date
• Last Order Revenue
• Mobile Browser
• Mobile Email Client
• Mobile Number
• Operating System
• Primary Browser
• Primary Email Client
• Source
• Total Orders
• Total Revenue
• Twitter User ID

5. Click **Select**.
6. Click the following text in the Contact Field Comparison filter node: **is equal to**.
7. From the pull-down menu, choose how you want to compare (i.e. the operator) the value contained in the field with value you specify.

The operators you can choose in the field comparison pull-down menu change depending on the type of data stored in the field you selected. For example, if you choose a field that stores dates, then the field comparison menu will contain operators that are relevant for comparing dates. For a detailed explanation of the different field operators and their accepted values, see Field Data Types.

8. Click **Done**.
9. Click the following text in the Contact Field Comparison filter node: **a value**.
10. Specify a value that will be compared against the value contained in the field you choose.

   The allowed values will differ depending on the type of field you choose. For a detailed explanation of the different field operators and their accepted values, see Field Data Types.
11. Click **Done**.

### Use The List Membership Filter Node In Workflows

The List Membership filter node filters a workflow based on whether a contact is on a specific list.

To use the List Membership filter node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the List Membership filter node on to the workflow canvas.
3. Click the following text in the List Membership filter node: **a list**.
4. Click on the name of the list that you want to use to filter the workflow.
Tip: You can click Create New List to create a new list without having to navigate away from the workflow.

5. Click Done.

Use The Segment Membership Filter Node In Workflows

The Segment Membership filter node filters a workflow based on whether a contact is on a specific segment.

The Segment Membership filter will look to see if a contact is on a segment, based on when the segment was last refreshed. Segments are not refreshed each time a contact reaches this node in a workflow.

Note: Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

To use the Segment Membership filter node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Segment Membership filter node on to the workflow canvas.
3. Click the following text in the Segment Membership filter node: a segment.
4. Click on the name of the segment that you want to use to filter the workflow.
5. Click Done.

Use The SMS Keyword Membership Filter Node In Workflows

The SMS Keyword Membership filter node filters a workflow based on a contact's membership to individual subscription keywords.

To use the SMS Keyword Membership filter node:

Tip: For more information on creating SMS subscription keywords, see Create SMS Keywords on page 261.

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the SMS Keyword Membership filter node on to the workflow canvas.
3. Click the following text in the SMS Keyword Membership filter node: any.
4. Using the Filter Constraint pull-down menu, select whether the contact should be a member of all or any of the selected keywords. You can select:
   - Any
   - All
5. Click Done.
6. Click the following text in the SMS Keyword Membership filter node: selected keywords.
7. Select one or more subscription keywords.
8. Click Done.

Use The Contest Filter Node In Workflows
The Contest filter node filters a workflow in a contest-related manner, i.e. the first X contacts get sent down the NO path, the next Y contacts go down the YES path, and all others go down the NO path.

To use the Contest filter node:
1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   - Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Contest filter node on to the workflow canvas.
3. Click the following text in the Contest filter node: 100.
4. Specify the first X number of contacts (aka the threshold count) who will be sent down the NO path when they reach this node in a workflow.
5. Click Done
6. Click the following text in the Contest filter node: 10.
7. Specify the next X number of contacts (aka the threshold count) who will be sent down the YES path when they reach this node in a workflow.
8. Click Done.

Use The Interval Filter Node In Workflows
The Interval filter node filters a workflow in intervals (i.e. every Xth contact goes to YES, others go to NO.).

To use the Interval filter node:
1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
Automate

Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the **Interval** filter node on to the workflow canvas.
3. Click the following text in the Interval filter node: **2nd**.
4. Add a number in the **Interval Count** text box corresponding to the interval at which contacts will be sent down the **YES** path when they reach this node in a workflow.
5. Click **Done**.

**Use The Email Activity Filter Node In Workflows**

The Email Activity filter node filters a workflow based on whether or not a contact opened, clicked on, converted from, or was sent emails.

Emails can be targeted either by email message, delivery, or delivery group. If you have enabled Campaigns you will also be able to use this node to filter based on campaign.

For example, you could use the Email Activity node to filter contacts based on whether or not they opened a message that was in a delivery you sent.

To use the Email Activity filter node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Email Activity filter node on to the workflow canvas.
3. Click the following text in the Email Activity filter node: **was sent**.
4. Select the email action that a contact must perform in order to be sent down the **YES** path. You can select:
   
   - Was Sent
   - Opened
   - Clicked
   - Converted From
5. Click **Done**.
6. Click the following text in the Email Activity filter node: **an email**.
7. Click on either:
   
   - **Show Messages** to target emails regardless of which delivery they belong to.
   - **Show Deliveries** to target a single delivery.
   - **Show Delivery Group** to target a specific delivery group.
   - **Show Campaign** to target a campaign. If you have not enabled Campaigns you will not see this option.
8. Click on the name of a message, delivery, delivery group, or campaign.

   If you select a message, contacts will be sent down the **YES** path if they perform the action selected above on any deliveries made using the message. If you select a delivery group, contacts will be sent down the **YES** path if they perform the action selected above on any deliveries added to the delivery group. Etc.
9. Click **Done**.
10. Click the following text in the Email Activity filter node: **3 hours**.
11. Select the time frame a contact has to complete the action on the message, delivery, or delivery group before they are sent down the NO path. You can choose X number of:
   - Hours
   - Days
   - Weeks
   - Months

12. Add a numerical value in the input.
    This numerical value corresponds to the time frame selected in the previous step.

13. Click Done.

---

**Use The Webform Activity Filter Node In Workflows**

The Webform Activity filter node filters a workflow based on if a contact submits or views a webform in a specified amount of time.

For more information on webforms, see Webforms.

To use the Webform Activity filter node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Webform Activity filter node on to the workflow canvas.

3. Click the following text in the Webform Activity filter node: submits.

4. Select one of the following from the Webform Action pull-down menu:
   - Submits
   - Views

5. Click Done.

6. Click the following text in the Webform Activity filter node: a webform.

7. Click in the row associated with a webform.

8. Click Select.

9. Click the following text in the Webform Activity filter node: 3 hours.

10. Enter a numerical value in the After text box.

11. From the pull-down menu, select the relative amount of time a contact has to submit or view the webform in order to proceed down the YES path. You can select:
   - Hours
   - Days
   - Weeks
   - Months

12. Click Done.
Use The Twitter Activity Filter Node In Workflows
The Twitter Activity filter node filters a workflow based on whether or not a contact has mentioned a stored Twitter username (aka Twitter handle) in your account.

Tip: For more information on integrating your account with a Twitter account, see Set Up Your Account So You Can Post To Twitter on page 1285 in help.

To use the Twitter Activity filter node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Twitter Activity filter node onto the workflow canvas.
3. Click the following text in the Twitter Activity filter node: a stored username.
4. Choose a Twitter username, that when mentioned, will send a contact down the YES path.
5. Click Done.
6. Click the following text in the Twitter Activity filter node: 3 hours.
7. Choose the time frame a contact has to mention the Twitter username (previously specified) before they are sent down the NO path. You can choose X number of:
   • Hours
   • Days
   • Weeks
   • Months
   The filter timeout determines how long to wait before the No path is chosen.
8. Click Done.

Use The SMS Message Activity Filter Node In Workflows
The SMS Message Activity filter node filters a workflow based on if a contact was sent, replied to, or clicked on a link in an SMS message you sent them.

You can also select the relative amount of time a contact has to complete the action in order to proceed down the YES path.

Note: Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.
To use the SMS Message Activity filter node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the SMS Message Activity filter node on to the workflow canvas.
3. Click the following text in the SMS Message Activity filter node: replied to.
4. From the pull-down menu, select the action that must be undertaken in order for a contact to go down the YES path. You can choose:
   • Was Sent
   • Replied To
   Note: Replies must contain a keyword. If a contact attempts to reply to an SMS message and the reply does not contain a keyword, they will receive an SMS response telling them to contact support or unsubscribe.
   • Clicked
5. Click Done.
6. Click the following text in the SMS Message Activity filter node: an SMS message.
7. Click on the name of an SMS message the contact must have been sent, or replied to, in order to proceed down the YES path.
8. Click Select.
9. Click the following text in the SMS Message Activity filter node: 3 hours.
10. Enter a numerical value in the After text input.
11. From the pull-down menu, select the relative amount of time a contact has to complete the action selected in step 4 in order to proceed down the YES path. You can select:
   • Hours
   • Days
   • Weeks
   • Months
12. Click Done.

Use The Email Address Validation Filter Node In Workflows
The Email Address Validation filter node filters a workflow based on whether or not content from a previous node contained an email address.
To use the Email Address Validation filter node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to \texttt{Automation > Workflows} and click \texttt{Create New Workflow}.
   
   \begin{itemize}
   \item \textbf{Note:} If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
   \end{itemize}

2. Drag the Email Address Validation filter node on to the workflow canvas.

3. Click the following text in the Email Address Validation filter node: \texttt{some content}.

4. Click either
   
   \begin{itemize}
   \item \textbf{Use Content From A Previous Node} radio button to use content from a previous node.
   
   If you choose this option, you will need to choose a preceding node whose content you want to pull email addresses from. If this node is connected to the Initial Incoming SMS With Keyword trigger, you can select to pull the keyword contained in the incoming SMS message.
   
   \item \textbf{Use Input Field's Value} radio button to use the value specified in the input field.
   
   This causes the workflow to only take the \texttt{YES} path if the content from a preceding node contains an email address matching the value contained in the input field.
   \end{itemize}

If no previous node exists, you will see the text \texttt{Please add a connection to this node to use a previous node's value} in the node. If a previous node exists, but no content is available, you will see the text \texttt{There is no data available from any of the previous nodes}.

5. Optional: You can turn on email validation.

   Email validation allows you to send a verification email containing a confirmation URL. In order to proceed down the \texttt{YES} path in the workflow, the recipient must click the confirmation URL and confirm their subscription within a specified time frame. If they do not confirm their subscription within the specified time frame, they are sent down the \texttt{NO} path.

   To use email validation:

   a) Click the following text in the Email Address Validation filter node: \texttt{off}.
   
   b) Click the \textbf{Email Verification Enabled} checkbox.
   
   c) Specify a from name for the verification email in the \textbf{From Name} text box.
   
   d) Specify a from address for the verification email in the \textbf{From Address} text box.
   
   e) Click \textbf{Pick}.
   
   f) Choose a message to send as the verification email by clicking on the message name. You will only be able to select messages which contain a confirmation URL.

   Confirmation URLs can be added to any email message by adding the $\%\%!confirm\_url\%\%$ special tag to the body of the message. For more information on using special tags in email messages, see \texttt{Special Tags} on page 152.
   
   g) Click \textbf{Select}.
   
   h) Click \textbf{Done}.
   
   i) Click the following text in the Email Address Validation filter node: \texttt{a relative period of time}.
   
   j) From the \textbf{Delay Type} pull-down menu, choose how long you will give the recipient of the confirmation email to click the confirmation URL and confirm their subscription.
You have three options:

- A Relative Period Of Time
- Until A Specific Date
- Until A Certain Hour

k) Click Done.
l) Based on which option you choose in the Delay Type pull-down menu, you can do the following:

- If you choose A Relative Period Of Time: Click 2 days and then choose a time frame from the pull-down menu. You can choose:
  - Hours
  - Days
  - Weeks
  - Months

After you pick the time frame, add in a number representing the number of hours, days, weeks, or months you want to give the recipient to click the confirmation URL contained in the confirmation email you sent them.

- If you choose Until A Specific Date: Click date and pick a specific date using the date picker. Next, click time and pick a specific time.

  This represents how long the recipient has to click the confirmation URL contained in the confirmation email you sent them.

- If you choose Until A Certain Hour: Click 13:30 AM and pick a specific time.

  This represents how long the recipient has to click the confirmation URL contained in the confirmation email you sent them.

6. Click Done.

Use The Random Filter Node In Workflows
The Random filter node filters a workflow by sending configurable percentages of contacts down different paths.

Warning: The percentages you enter for each outgoing connection must add up to 100%. If they do not, an error will be shown when you attempt to save the workflow.

To use the Random filter node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Random filter node on to the workflow canvas.
3. Click on one of the five percentages in bold above each outgoing connection.
4. Enter a numerical value between 0 and 100 representing a percentage.
5. Click Done.
6. Repeat steps three, four, and five for each outgoing connection you want to use.
You do not have to use all five outgoing connections. For example, if you only want to use two outgoing connections, enter **50%** for two of the outgoing connections, and enter **0%** for the remaining three.

An outgoing connection does not need to connect to another node. Contacts who reach an outgoing connection not connected to another node will not continue moving through the workflow.

---

**Use The Cart Status Filter Node In Workflows**

The Cart Status filter node filters a workflow by sending contacts down different paths based on the status of their shopping cart.

**Important:** This topic only applies to you if you pass either cart or order data from your site into Bronto.

To use the Cart Status filter node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.
   
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Cart Status filter node on to the workflow canvas.

3. Connect the outgoing connections to other nodes based on the status of the contact's shopping cart when they reach this node.

   The outgoing connections correspond to the following cart status types:
   
   - **Active** - The shopping cart is currently shopping / checking out.
   - **Abandoned** - The shopping cart is abandoned.
   - **Complete** - The shopping cart has been converted to an order.

   An outgoing connection does not need to connect to another node. Contacts who reach an outgoing connection not connected to another node will not continue moving through the workflow.
Use The Cart Phase Filter Node In Workflows
The Cart Phase filter node filters a workflow by sending contacts down different paths based on their cart's phase when the cart was abandoned.

Important: This topic only applies to you if you pass either cart or order data from your site into Bronto.

You can use the Cart Phase filter node to send contacts an email or to move contacts onto a specific list based on the phase their cart was in when it was abandoned. For example, you could send a discount email to contacts who abandoned a cart in the billing phase. You can only filter one phase per node, but a single workflow can have multiple Cart Phase filter nodes.

To use the Cart Phase filter node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Cart is Abandoned trigger node to the workflow canvas.
   The Cart Phase filter node can only be added to workflows that are triggered by the Cart is Abandoned trigger node.

3. Drag the Cart Phase filter node on to the workflow canvas.

4. Select a cart phase:
   - billing
   - order complete
   - order review
   - payment
   - shipping info
• shipping method
• shopping

Each cart phase is defined by the jQuery Selector its mapped to on the Home > Settings > Commerce page. For more information see Set Up Cart Phases For Shopping Cart Abandonment on page 1148.

5. Click Done.

6. Connect the Cart Phase filter node to the relevant nodes in your workflow.

7. Continue to add and connect other filter and action nodes until your workflow is complete.

8. Click

- Save Changes to save the current version of the workflow and continue editing.
- Save & Close to save and close the workflow.

Use The Cart/Order Field Comparison Filter Node In Workflows

The Cart/Order Field Comparison filter node filters a workflow by sending contacts down different paths based on the value of the specified cart or order fields.

Important: This topic does not apply to you if you do not use Order Service. For more information, contact your account representative.

You can use the Cart/Order Field Comparison filter node to send contacts an email or to move contacts onto a specific list based on the order or cart information you have for the contact. For example, you could send a contact an email that offers free shipping when the Shipping Amount in an abandoned cart is less than five dollars. Or you could send an email to contacts that offers a discount when the Total for their last order was greater than 100 dollars.

This node can be used in workflows that are triggered by the Cart Is Abandoned, Order Is Added, or Order Is Shipped trigger nodes.

To use the Cart Phase filter node:

1. Create a new workflow or edit an existing workflow.

To create a new workflow, go to Automation > Workflows and click Create New Workflow.

Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the relevant trigger node to the workflow canvas.

The Cart/Order Field Comparison filter node can only be added to workflows that are triggered by the Cart Is Abandoned, Order Is Added, or Order Is Shipped trigger nodes.

3. Drag the Cart/Order Field Comparison filter node on to the workflow canvas.

4. Click on created date in the node text and select a field to use.

- Created Date: Date and time the order was recorded.
- Customer Order ID: ID of customer who owns the cart. This is a numerical identifier, not a contact's email address.
- Updated Date: Date the order was last updated.
- Shipping Date: Date the order will or has shipped.
- Shipping Details: Shipment tracking details such as the tracking number, carrier, etc.
- Shipping Amount: The total cost for shipping.
- **Shipping URL**: Shipment tracking URL.
- **Sales Tax**: The tax amount passed in for the order.
- **Discount**: The discount amount passed in for the order.
- **Subtotal**: Amount for the order before tax and shipping.
- **Total**: Total cost for the order including tax, shipping, and discounts.
- **Currency**: Currency type; for example, USD (United States Dollar).

  a) Click **Done**.

5. Click on **equals** or **is equal to** in the node text and select how you want to compare (i.e. the operator) the field value you will specify in the next step.

   For example, you can target a week by selecting **Is In A Time Frame** from this list and the date value **This Week (M-F)** in the next step. The operators you can choose change depending on the type of data stored in the field you selected. For example, if you choose a field that stores dates, then the field comparison menu will contain operators that are relevant for comparing dates. Some values you select from this menu may not require you to also complete the next step.

   a) Click **Done**.

6. Click on either **to a value** or **a new date** in the node text and add the relevant text or select the relevant item you want to use as your comparison value.

   For example, if you selected **Shipping Date** and **Equals** in the previous steps, you would select the date you want to target from the calendar. Some of the operator you can select in the previous step do not require you to complete this step. For example, if you selected **Discount** and **Is empty** then you will not have a third value to set.

   a) Click **Done**.

7. Connect the **Cart/Order Field Comparison** filter node to the relevant nodes in your workflow.

8. Continue to add and connect other filter and action nodes until your workflow is complete.

9. Click

   - **Save Changes** to save the current version of the workflow and continue editing.
   - **Save & Close** to save and close the workflow.

### Use The Line Item Comparison Filter Node In Workflows

The Line Item Comparison filter node filters a workflow by sending contacts down different paths based on the value of one or more of the items in a cart or order.

#### Important: This topic does not apply to you if you do not use Order Service. For more information, contact your account representative.

This node can be used to filter contacts based on the attributes of what they have placed in carts or have ordered. For example, if a contact places three items of the same category in a cart then abandons it, you could use this node to send them a message that offers a buy three get one free deal.

This node can be used in workflows that are triggered by the Cart Is Abandoned, Order Is Added, or Order Is Shipped trigger nodes.

To use the Line Item Comparison filter node:
1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the relevant trigger node to the workflow canvas.
   
   The Line Item Comparison filter node can only be added to workflows that are triggered by the Cart Is Abandoned, Order Is Added, or Order Is Shipped trigger nodes.

3. Drag the Line Item Comparison filter node on to the workflow canvas.

4. Click 1 and select the number of items in a cart you want to match the values you specify for this node.

5. Identify the line item value you want to target:
   a) Click field.
   b) Select either Cart Field or Product Field.
      
      Both are used to target line items. Cart Fields come from imported cart data and are unique to each cart you import. Product Fields are data that you have imported into your product catalog. Select the value that corresponds with how you import product data into Bronto.
   c) Select a line item field from the drop-down list.
      
      For more information about the available Cart Fields see Order Fields / Order Details on page 1025. For more information about the available Product Fields see Product Field Descriptions on page 1130.
   d) Click Done.

6. Click on equals or is equal to in the node text and select how you want to compare (i.e. the operator) the field value you will specify in the next step.

   For example, you can target a week by selecting Is In A Time Frame from this list and the date value This Week (M-F) in the next step. The operators you can choose change depending on the type of data stored in the field you selected. For example, if you choose a field that stores dates, then the field comparison menu will contain operators that are relevant for comparing dates. Some values you select from this menu may not require you to also complete the next step.
   a) Click Done.

7. Click on either to a value or a new date in the node text and add the relevant text or select the relevant item you want to use as your comparison value.

   For example, if you selected Shipping Date and Equals in the previous steps, you would select the date you want to target from the calendar. Some of the operator you can select in the previous step do not require you to complete this step. For example, if you selected Discount and Is empty then you will not have a third value to set.
   a) Click Done.

8. Connect the Line Item Comparison filter node to the relevant nodes in your workflow.

9. Continue to add and connect other filter and action nodes until your workflow is complete.

10. Click
    • Save Changes to save the current version of the workflow and continue editing.
    • Save & Close to save and close the workflow.

Use The Date Filter Node In Workflows
The Date filter node filters a workflow based on the current day's relationship to a calendar date you set.

There are two values you can set on the Date filter node.
Click **on or before** to set the comparison time for the date. Options you can select include:

- **On or before** (the current day must be the selected date or fall before this date)
- **Before** (the current day must be before the selected date)
- **On or after** (the current day must be the selected date or fall after this date)
- **After** (the current day must be after the selected date)

Click on **date** to pick a date from the calendar.

When a contact enters this node, the workflow compares the current date to the date filter you set. Then it will route the contact to the appropriate node(s) connected to **Yes** and/or **No** based on how the current date relates to the filter you set.

For example, if you run ongoing promotions, you might want to set this node to **on or before** the date the current promotion ends - let's say June 1, 2017. If the current date is on or before June 1, 2017, then the contact is moved to the connected **Yes** node, where you can use a Send Email node to send them an email about the current promotion. If the current date is after June 1, 2017, the contact is moved to the corresponding **No** node, where you can use a Send Email node to send them an email about the next promotion. In this example, after June 1, 2017 the **Yes** path will never be triggered again. In this situation, you could update the date on the node. You could also string together a series of Date filter and Send Email action nodes when you build the workflow that would keep the workflow up-to-date for the length of the promotion.

To use the **Date** filter node:

1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   - **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the **Date** filter node on to the workflow canvas.
3. Click **on or before**, select an option from the **Date Comparator** list, then click **Done**.
   - Remember, whatever you select is how the current date will be compared to the date you select. So, if you select **After** contacts will move along the **Yes** path when the current date falls after the date you select.
4. Click on **date**, click on the calendar icon and select a date, then click **Done**.
5. Connect the node to the rest of your workflow.

**Workflow Action Nodes**

Action nodes represent nodes that perform an action when a contact reaches them in a workflow.

An action node might send email, update field information, or change a contact's list membership. A workflow can have multiple action nodes.

When you create your workflow, you may need to use the same type of filter node with the same criteria multiple times. When this happens, you should have a separate action node that pairs with each filter node, even if both filter nodes lead to taking the same action. You should never connect two identical filter nodes to one action node.

For example, you may have two different filter nodes that each check for the value of a contact field. Both filter nodes then feed into separate child filter nodes that check which segment a contact is on. If your contact is on the matching segment, then you want to add them to a specific list. In this scenario, you would have both segment filter nodes feed into their own child action node that changes list membership. You would not have the parent filter nodes feed into the same action node.
This table describes all possible action nodes and provides links to the topics for using each individual node.

<table>
<thead>
<tr>
<th>Node Name</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change Contact Field</strong></td>
<td>Changes the value in a contact's field to either a specific value, or a value from a previous node's content.</td>
<td>If you send a customer a coupon code that can only be used once after they subscribe, you can use this node mark that action as complete and prevent a contact from being able unsubscribe and subscribe again to get a new coupon.</td>
</tr>
<tr>
<td><strong>Change Contact Status</strong></td>
<td>Updates a contact's status to Unsubscribed.</td>
<td>You can use this node to unsubscribe a contact from your account after a failed re-engagement campaign.</td>
</tr>
<tr>
<td><strong>Delay</strong></td>
<td>Delays a contact from moving to the next node in the workflow for a specific period of time.</td>
<td>If you send contacts a message that includes a request to complete a webform, you'll want to use a Delay node to give them a set amount of time to fill out the webform before you send them a second request.</td>
</tr>
<tr>
<td><strong>Change List Membership</strong></td>
<td>Adds or removes a contact from a list.</td>
<td>If a contact is on a welcome series list, you can use this node to exclude them from promotional content series lists.</td>
</tr>
<tr>
<td><strong>Send Email</strong></td>
<td>Sends an email to a contact when they reach this node in a workflow.</td>
<td>Use this node to send an email to your contact.</td>
</tr>
<tr>
<td><strong>Change Contact Email Address</strong></td>
<td>Sends an email to a contact when they reach this node in a workflow.</td>
<td>If a contact sends their email address in an SMS message, you can use this node add their email address to their data. If their email address already exists in your account, the SMS record and the email record are merged.</td>
</tr>
<tr>
<td><strong>Post To Twitter</strong></td>
<td>Posts a Twitter message to a specific Twitter account you have integrated with.</td>
<td>You can use this node to automate sending tweets from your account.</td>
</tr>
<tr>
<td><strong>Post To Facebook</strong></td>
<td>Posts a Facebook message to a specific Facebook account you have integrated with.</td>
<td>You can use this node to automate sending Facebook posts to your account.</td>
</tr>
<tr>
<td><strong>Send SMS</strong></td>
<td>Sends an SMS message to a contact.</td>
<td>Use this node to send contacts an SMS message, as part of a welcome series, for example.</td>
</tr>
<tr>
<td><strong>Stop SMS Session</strong></td>
<td>Terminates a keyword session associated with the workflow.</td>
<td>Stop reading their responses. terminate the session in the workflow</td>
</tr>
<tr>
<td><strong>Remove From SMS Keyword</strong></td>
<td>Removes a contact from the keyword associated with the workflow.</td>
<td>You can use node to remove a contact from an SMS keyword.</td>
</tr>
</tbody>
</table>

**Use The Change Contact Field Action Node In Workflows**
The Change Contact Field action node changes the value in a contact's field to either a specific value, or a value from a previous node's content.
To use the Change Contact Field action node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Change Contact Field node on to the workflow canvas.

3. Click the following text in the Change Contact Field action node: field.

4. Click on the name of the field whose value you want to change.

5. Click Select.

6. Click the following text in the Change Contact Field action node: a new value.

7. Specify a value that you will update the field with.

   The allowed values will differ depending on the type of field you choose. For a detailed explanation of the different field operators and their accepted values, see Field Data Types.

**Optional:** For text fields, you can:

- Click Use Input Field's Value to use the value specified in the input field to update the field. The workflow will update the field using the value specified in the input field in this node.

- Click Use Content From A Previous Node to use content from a previous node when updating the contact's email address. If you choose this option, you can then choose:
  
  - Content From Initial SMS: (If this node is preceded by the Initial Incoming SMS With Keyword trigger but not the SMS Message Activity trigger)
  
  - Keyword: (If this node is preceded by the Initial Incoming SMS With Keyword trigger)
  
  - Content From SMS Reply: (If this node is preceded by the SMS Message Activity trigger)
  
  - Parsed Email Address: (If this node is preceded by the Email Address Validation filter)

**Optional:** For number, currency, and decimal fields, you can:

- Click the Add Number By Value pull-down menu. Here you can choose to:
  
  - Increment By
  
  - Decrement By
  
  - Set To (a specific value).

- Click Use Input Field's Value to use the value specified in the input field to update the field. The workflow will update the field using the value specified in the input field in this node.

- Click Use Content From A Previous Node to use content from a previous node when updating the contact's email address. If you choose this option, you can then choose:
  
  - Content From Initial SMS: (If this node is preceded by the Initial Incoming SMS With Keyword trigger but not the SMS Message Activity trigger)
  
  - Keyword: (If this node is preceded by the Initial Incoming SMS With Keyword trigger)
  
  - Content From SMS Reply: (If this node is preceded by the SMS Message Activity trigger)
  
  - Parsed Email Address: (If this node is preceded by the Email Address Validation filter)

**Optional:** For date fields, you can click Today to access the Date Type list. Here you can choose to set the date to:
Automate

- **Today** to use the current day. The current day is the 24 hour period from when the contact passes through this node in the workflow.
- **Today Plus** to pick a date a certain amount of time in the future. After you select **Today Plus** you will need to click **days** to set the number of days, weeks, months, or years you want to pass. You can only go up to 100 years into the future.
- **A Specific Date** to use an exact date. After you select **A Specific Date** you will need to click **a new date** to set the date.

If no previous node exists, you will see the text **Please add a connection to this node to use a previous node's value** in the node. If a previous node exists, but no content is available, you will see the text **There is no data available from any of the previous nodes.**

8. Click **Done**.

**Use The Change Contact Status Action Node In Workflows**

The Change Contact Status action node updates a contact's status to **Unsubscribed**.

This node can be especially useful in workflows used for list hygiene.

Contacts with a status of **Unsubscribed** can not be sent to. For more information on the different types of contact status, see **Contact Status** on page 1083.

To use the Change Contact Field action node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.
   
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Change Contact Status node on to the workflow canvas.

**Use The Delay Action Node In Workflows**

TheDelay action node delays a contact from moving to the next node in the workflow for a specific period of time.

You can use the delay node to carefully time the steps in a workflow. A good example of this is to give contacts a certain period of time to complete an action before they're moved further down a workflow path. For example, if you send contacts a message that includes a request to complete a webform, you'll want to use a delay node to give them a set amount of time to fill out the webform before you send them a second request.

To use the Delay action node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.
   
   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the **Delay** node on to the workflow canvas.
3. Click the following text in the **Delay** action node: **relative period of time**.
4. Select the type of delay you want. You can select:
   - **For A Relative Time Period**
   - **Until A Specific Date**
   - **Until A Certain Hour**
5. Click **Done**.
6. Click the one of following pieces of text in the **Delay** action node:
   - **2 days** - Shown if you selected **For A Relative Time Period**
   - **choose a date** - Shown if you selected **Until A Specific Date**
   - **and time** - Shown if you selected **Until A Certain Hour**
7. Add a value for the **Delay** action node. The allowed values depends on what you selected in the previous step. If you selected:
   - **2 days** - Add a numerical value in the **Wait for** text box.
   - **choose a date** - Use calendar picker pick to specific date to delay until.
   - **and time** - Use the time picker to pick a specific time to delay until.
8. If you selected **For A Relative Time Period**: Select the time frame for the delay. You can select:
   - **Minutes** - Sets the delay to the number of hours specified. The lowest allowed time frame for minutes is **15**.
   - **Hours** - Sets the delay to the number of hours specified.
   - **Days** - Sets a delay based on calendar days. If you choose a 1 day delay, the node will trigger on the next calendar day, not 24 hours later. If it is important to wait a full 24 hours, you should use the hours option instead of days.
   - **Weeks** - Sets a delay based on calendar weeks.
   - **Months** - Sets a delay based on calendar months.
   
   If you select **Minutes** or **Hours**, the delay will be approximate.
9. Click **Done**.
10. If you selected **Until A Specific Date**:
    a) Click the following text in the **Delay** action node: **and time**.
    b) Use the time picker to pick a specific time to delay until.
11. Click **Done**.

**Note:** When a contact exits the **Delay** node, they will progress to the node currently connected to the **Delay** node's outgoing connection. For example, if you have the **Send Email** node connected to the **Delay** node's outgoing connection, and you change the **Send Email** node to the **Change Contact Field** node, any contacts currently on the **Delay** node will progress to the **Change Contact Field** node when their delay is complete.

### Use The Change List Membership Action Node In Workflows

The Change List Membership action node adds or removes a contact from a list.

![Change List Membership](image)

To use the Change List Membership action node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to **Automation > Workflows** and click **Create New Workflow**.
Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Change List Membership node on to the workflow canvas.
3. Click the following text in the Change List Membership action node: add.
4. Choose whether you want to add or remove a contact from the list when they reach this node in a workflow.
5. Click Done.
6. Click the following text in the Change List Membership action node: a specific list.
7. Click on the name of the list you want to add contacts to, or remove contacts from.
   Tip: You can click Create New List to create a new list without having to navigate away from the workflow.
8. Click Done.

Use The Send Email Action Node In Workflows
The Send Email action node sends an email to a contact when they reach this node in a workflow.

This node can be used to send marketing or transactional emails. When the Send Email node is triggered, the specified email is sent to the contacts who meet the workflow criteria. After the email is sent, each contact is added to the Processed Contacts metric. The Processed Contacts metric represents how many contacts were on this node that resulted in an email delivery being triggered. It does not reflect if the delivery was successful.

If:

• Your workflow includes a trigger node related to the Cart Recovery app (Cart Is Abandoned, Order Is Added, Order Is Shipped) the Send Email action node indicates if the cartID and/or orderID fields are provided to the message when it is sent. If the Cart Recovery app trigger nodes are not used in the workflow, or are not providing fields to the email, the Send Email node indicates that no fields, or none, are provided to the message.
• You have enabled Campaigns, you can set a campaign at the Send Email node level. Setting a campaign here will add any deliveries sent from this node to the campaign. Because a delivery can only belong to a single campaign, this will prevent these deliveries from being added to the default campaign you set for the workflow.

CAUTION: If a workflow results in an email being sent, that email cannot be used to trigger another workflow. This limitation is meant to prevent a workflow from entering a loop where it can never be completed.

To use the Send Email action node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Send Email node on to the workflow canvas.

3. Click the following text in the Send Email action node: **marketing**.

4. From the pull-down menu choose either **marketing** or **transactional**.

   A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. For more information see **Transactional Emails** on page 294. A message must be approved for transactional sending in order for it to be used in a transactional delivery. For more information on getting an email approved for transactional sending, see **Request Transactional Message Approval** on page 299.

5. Select an email message to send
   
   a) Click the following text in the Send Email action node: **an email message**.
   
   b) Click on the name of the email message you want to send.

      You can see a thumbnail preview of each message by hovering your pointer over the message name in the **Pick A Message** list.

      If you selected to send a transactional email, make sure the primary purpose of the email you select is transactional in both the subject line and body. For more information, see **Is My Email Transactional?** on page 294.

      Note: You will only be able to select messages that have been approved for sending. For more information on message approval, see **Enable Message Approval Prior To Send** on page 1332.

   c) Click **Select**.

      After you select a message you can see a thumbnail preview of the message by hovering your pointer over the message name in the Send Email node text.

6. Optional: If campaigns are enabled and you want to add deliveries from this node to a specific campaign:
   
   a) Click **a campaign**.
   
   b) Click on the name of the campaign you want to use.

      If you want to create a new campaign, click **New Campaign**, enter a name for the campaign in the **Name** box, elect a marketing campaign type from the **Type** list, enter a **Description**, and then click **Save Changes**.

   c) Click **Select**.

7. Optional: If you wish to change the **From Name** and/or **From Address**:

   - To change the default From Name, click **a name**, provide a new from name, then click **Done**.
   - To change the default From Address, click **email address**, provide a new from email address, then click **Done**.

   The From Name and From Address will be auto-populated in the Send Email action node.
8. Optional: Click the bold text on for Sender authentication if you wish to disable this feature.

9. Optional: Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

10. Optional: If your email uses product data, you can map the delivery-specific products for sends from this workflow:
   a) Click Products.
   b) Select whether the this is a Product tag or a Recommendations tag from the Product Type list.
   c) If you selected
      • Product then enter the product ID in the Delivery Specific Product ID box.
      • Recommendations then select the recommendation from the Delivery Specific Product ID list.

      The Order number is automatically provided, but you can change this as desired. Order cannot target a specific recommendation, but can be used to ensure the highest rated recommendations are featured most prominently in message design. The lower the number, the higher on the recommendation list the product is.
   d) Repeat the previous steps as necessary until all of your defaults are mapped.
   e) Click Save.

11. Add and any other relevant nodes to the workflow and configure them.

12. Connect the nodes.

13. Save the workflow.

   The workflow will not trigger an event until you activate it. To activate a workflow, click on the Inactive button to change the status to active.

You can activate a workflow from the Workflow Builder page or the Workflows Overview table.

To view the number of emails successfully delivered from a workflow, go to Automation > Workflows and click the report icon in the row for the workflow. The Delivered metric in the report displays how many emails were successfully delivered. For more information on viewing a report for a workflow, see .

**Use The Change Contact Email Address Action Node In Workflows**

The Change Contact Email Address action node sends an email to a contact when they reach this node in a workflow.

![Change Contact Email Address](image)

To use the Change Contact Email Address action node:

1. Create a new workflow or edit an existing workflow.
   
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.

   **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Change Contact Email Address node on to the workflow canvas.

3. Click the following text in the Change Contact Email Address action node: a new value.

4. Click

   • Use Content From A Previous Node to use content from a previous node when updating the contact's email address. If you choose this option, you will need to specify whether you want to use the parsed email address
(only if the Email Validation Filter precedes this node), or the preceding node whose content you want to use to update the contact's email address.

- **Use Input Field's Value** to use the value specified in the input field to update the field. This causes the workflow to update the field using only the value contained in the input field.

If no previous node exists, you will see the text Please add a connection to this node to use a previous node's value in the node. If a previous node exists, but no content is available, you will see the text There is no data available from any of the previous nodes.

5. Click Done.

**Use The Post To Twitter Action Node In Workflows**
The Post To Twitter action node posts a Twitter message to a specific Twitter account you have integrated with.

For more information on integrating with a Twitter account, see Set Up Your Account So You Can Post To Twitter on page 1285.

To use the Post To Twitter action node:

1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
     - **Note:** If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Post To Twitter node on to the workflow canvas.
3. Click the following text in the Post To Twitter action node: a message.
4. Click on the name of the Twitter message you want to post.
   - **Note:** You will only be able to select messages that have been approved for sending. For more information on message approval, see Enable Message Approval Prior To Send on page 1332.
5. Click Select.
6. Click the following text in the Post To Twitter action node: a stored account.
7. Choose the stored Twitter account you want to post this message to.
8. Click Done.

**Use The Post To Facebook Action Node In Workflows**
The Post To Facebook action node posts a Facebook message to a specific Facebook account you have integrated with.

For more information on integrating with a Facebook account, see Set Up Your Account So You Can Post To Facebook on page 1287.

To use the Post To Facebook action node:
1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Post To Facebook node on to the workflow canvas.

3. Click the following text in the Post To Facebook action node: a message.

4. Click on the name of the Facebook message you want to post.
   
   Note: You will only be able to select messages that have been approved for sending. For more information on message approval, see Enable Message Approval Prior To Send on page 1332.

5. Click Select.

6. Click the following text in the Post To Facebook action node: a stored account.

7. Choose the stored Facebook account you want to post this message to.

8. Click Done.

Use The Send SMS Action Node In Workflows

The Send SMS action node sends an SMS message to a contact.

To use the Send SMS action node:

1. Create a new workflow or edit an existing workflow.
   To create a new workflow, go to Automation > Workflows and click Create New Workflow.
   
   Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.

2. Drag the Send SMS node on to the workflow canvas.

3. Click the following text in the Send SMS action node: an SMS message.

4. Click on the name of the SMS message you want to send.
   
   Note: You will only be able to select messages that have been approved for sending. For more information on message approval, see Enable Message Approval Prior To Send on page 1332.

   Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

5. Click Select.

Use The Stop SMS Session Action Node In Workflows

The Stop SMS Session action node terminates a keyword session associated with the workflow.

Note: Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

The Stop SMS Session action node is useful in situations where you could have contacts interacting with multiple keywords in a short time frame. For example:
1. A contact texts in to keywordA
2. This triggers a workflow that sends an SMS message to the contact asking them for their email address.
3. The contact replies with their email address and the workflow ends.
4. The contact then texts in to keywordB before the session for keywordA has ended.
5. Due to how SMS sessions work, the text sent to keywordB is seen as a reply to keywordA and not as a different keyword that should start a new session.

By using the Stop SMS Session action node, the session for keywordA can be ended as soon as the workflow associated with that keyword has ended (in other words, when they reach step 3 above).

For more information on setting up the SMS integration and creating keywords, see SMS Integration Settings on page 1279.

To use the Stop SMS Session action node:

1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
     - Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Stop SMS Session node on to the workflow canvas.

Use The Remove From SMS Keyword Action Node In Workflows
The Remove From SMS Keyword action node removes a contact from the keyword associated with the workflow.

This action node can only be used with workflows that start with the Initial Incoming SMS With Keyword trigger node, but it cannot be connected directly to this node. When activated, the Remove From SMS Keyword action node will remove a contact from the keyword you specified in the trigger node. This allows you to update SMS keyword subscriptions "on the fly" based on a contacts reaction to SMS messaging.

For more information on setting up the SMS integration and creating keywords, see SMS Integration Settings on page 1279.

To use:

1. Create a new workflow or edit an existing workflow.
   - To create a new workflow, go to Automation > Workflows and click Create New Workflow.
     - Note: If you created a new workflow, make sure you name it by clicking the pencil icon above the Node Palette.
2. Drag the Initial Incoming SMS With Keyword trigger node on to the workflow canvas.
3. Add other nodes to the canvas as necessary.
4. Drag the Remove From SMS Keyword node on to the workflow canvas and connect it to another filter or action node in the workflow.
Test A Workflow

When you build a workflow, particularly a complex workflow, it's useful to test the workflow before you start using it. To do this, you can temporarily add filter nodes to the beginning of a workflow so only certain contacts are engaged when the workflow is triggered.

This allows you to make sure that the workflow functions as expected and to iron out any issues before you engage with your real contacts. Before you start a workflow test, you will need to have test contacts who match the workflow criteria that you can test with. For example, if you want to test a workflow that triggers based on order data, the contacts you test with need to have order data or the workflow test won't work. Also, you should be able to access the accounts for these contacts so you can make sure that the contacts receive the expected messages after the workflow is triggered.

It's a best practice to test with multiple contacts so you can test all of the paths your filter criteria can take your contacts through. An easy way to manage this level of complexity is to create a list of test contacts you can use for workflow testing and to use the List Membership filter node to only run these contacts through the workflow. You also have the option of testing a workflow using a single contact by using the Contact Field Comparison filter node.

When you use one of these filter nodes for testing, this node must be the first node that occurs after the trigger node in order to prevent any other contacts from being sent through the workflow.

To test a workflow:

1. Identify the contacts you want to use to test the workflow and add them to a list.
   - If you are only testing with a single contact, you do not need to add the contact to a list. For information about:
     - Importing contacts see Contact Imports on page 1080.
     - Creating a list see Create A List on page 534.
     - Adding contacts to a list see Add Contacts To A List From The Search Contacts Page on page 909.

2. Go to Automation > Workflows.

3. Open the workflow you want to test.
   - If you have a complex workflow and don't feel comfortable editing it, you can make a copy of the workflow and add your test nodes to the copy. Using a copy is also a good idea if you have a workflow with several long delay nodes, as you will want to adjust the delay times down.

4. To test with a list:
   - Drag the List Membership filter node to the canvas.
   - Click a list in the node text, click the name of your test list, and click Select.
   - Disconnect the workflow's trigger node from any other nodes it is connected to.
   - Connect the trigger node to the List Membership filter node.
   - Connect the List Membership filter node to the next nodes in your workflow.

5. To test with an individual contact:
   - Drag the Contact Field Comparison filter node to the canvas.
   - Click field in the node text, select Show Default Fields, click Email, and click Select.
   - Click a value in the node text, enter the email address for the test contact, and click Done.
   - Disconnect the workflow's trigger node from any other nodes it is connected to.
   - Connect the trigger node to the Contact Field Comparison filter node.
   - Connect the Contact Field Comparison filter node to the next nodes in your workflow.

6. If you have any delay nodes in the workflow that are set to greater than 15 minutes, drop the delays down to 15 minutes in order to facilitate faster testing.

7. Activate the workflow by clicking on the Inactive toggle.
   - The workflow is active and the contacts you identified using your filter nodes are sent through it.

8. Use your test contact accounts to see if the workflow is behaving as expected.
   - For example, was the contact moved to the appropriate list? Did the contacts receive the email you expected them to receive and were the tags replaced correctly?
9. If necessary, make adjustments to your workflow.
   If you want the workflow to stop sending to your test contacts as you edit it, make the workflow **Inactive** again.

10. When you are done testing the workflow:
   a) Make sure the workflow activation toggle is set to **Inactive**.
   b) Remove either the **List Membership** or **Contact Field Comparison** filter node.
   c) Connect the trigger node to the appropriate nodes in the workflow.
   d) If you are ready to start using the workflow, reactivate it. Otherwise, you're done.

### Successful Workflow Progression

When a contact enters a workflow, there are often multiple ways in which the contact can successfully complete the workflow.

A contact successfully completes a workflow when they reach a node or node path in the workflow with no outgoing connection. Workflows can, and often do have multiple endpoints where a contact can successfully complete the workflow. For example they reach an action node with no outgoing connection, or they reach the **No** path in a filter node that only has a connection for the **Yes** path.

To view the number of successful contacts for a workflow, go to **Automation > Workflows** and view the **Successful Contacts** column.

**CAUTION:** If a workflow results in an email being sent, that email cannot be used to trigger another workflow. This limitation is meant to prevent a workflow from entering a loop where it can never be completed.

### View A Workflow Report

You can view reports for your workflows.

For more information about workflow reports, see **Workflow Reports** on page 700.

Each tab at the top of a workflow report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see **Report: Overview Metrics (Legacy)** on page 702.
- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see **Report Deliverability Metrics (Legacy)** on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see **Report: Open Metrics (Legacy)** on page 721.
• **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.

• **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.

• **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (legacy) on page 734.

• **Metrics By Delivery** displays a quick view of the metrics associated with the deliveries of the message. For more information about Metrics By Delivery metrics, see Metrics By Delivery Report Metrics (Legacy) on page 737.

To view a report for a workflow:

1. Go to **Automation > Workflows**.
2. Click on the name of an existing workflow that has been activated.
3. Click **View Report**.

4. Click a tab at the top of the report to view the different sections of the report.

   For example, click **Deliverability** to view the detailed deliverability metrics. For more information about report sections, see Report Sections (Legacy Reports) on page 702.

5. To filter the report by a date range:
   a) Click the calendar icon.

   The calendar icon is to the right of the last report section tab.

   b) Select a date filter from the list of available filters.

   If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.

   When you filter a report by a date range, report metrics in gray bars and graphs may vary from the metrics in report grids because these datasets are collected differently. Metrics provided in bars and graphs are based on the event date. Metrics provided in report grids, like the grid on the Clicks tab, are based on the delivery date.

   c) To use a custom date range, click **Custom** and add a start and an end date in the date boxes.
d) To remove the filter, click the calendar icon and then click on All Time.

You can also:

- Download A Summary of Detailed Contact Report on page 821
- Add Contacts From A Report To A List on page 853
- Print a report by clicking the Print button.

**Related Topics**

Report Sections (Legacy Reports) on page 702

Report sections are the grouping of metrics that are found on reports.

**Workflow Templates**

Workflow templates are pre-built workflows that allow you to accomplish many common marketing campaigns.

When you open a workflow template, the workflow canvas will be pre-populated with all of the nodes and connections required to make the workflow function properly. Where applicable, we also pre-define the node properties required to make the workflow function properly. On your end, all you need to do is pick some of the details for the workflow (which field to compare, which email to send, etc.).

Below, you'll find an explanation of what each available workflow template does, what you need to do to get it up and running.

**Welcome Message Workflow Template**

The Welcome Message workflow template allows you to send a new contact a single welcome message when the contact is added to your account.

The Welcome Message workflow template starts when a contact is added to your account. By default, contacts who move from transactional to onboarding status are also included. When the workflow is triggered the contact is sent a welcome message. The purpose of this message is to introduce contacts to your brand and immediately encourage engagement with your message campaigns. Generally this is better accomplished with a two-message welcome series. If you want to send the contact a series of messages, use the Welcome Series workflow template. For more information see Welcome Series Workflow Template on page 399.

Before you use the Welcome Message workflow template you need to create the email you want to send to new contacts. For more information see Create Email: Message Editor on page 48.

**Note:** The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to Automation > Workflows.
2. Copy the Welcome Message Template:
   a) In the Template Workflows section, select the box for Welcome Message Template.
   b) Click Copy.
      A window appears asking if you are sure you want to copy the template.
   c) Click Copy.
3. In the Your Workflows list, click on the name of the copy you made.
   The copy of the template opens in the workflow builder.
4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the Name box.
   c) Enter a new description in the Description box.
   d) Click Ok.

5. In the Identifies All New Subscribers node, indicate whether you want contacts with an onboarding or active status to be included in this workflow.

6. In the Send Welcome Message node, select the email message that will be sent to the contact:
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.
      If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.
      If you already see your email address here you can skip this step.
   d) Click the bold text on for Sender authentication if you wish to disable this feature.
   e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

7. Click Save Changes.

8. If you are ready to start using your workflow, click the Inactive toggle to activate the workflow.
   The workflow starts working immediately after it is activated, so only do this if you want to start sending your welcome messages to new contacts.

Welcome Series Workflow Template
The Welcome Series workflow template allows you to send a new contact a two-email series of welcome messages when the contact is added to your account. Expanding a welcome message into a welcome series is the best way to introduce your values, your products, and other ways to connect with your brand such as social media or blogs.

The Welcome Series workflow template starts when a contact is added to your account. When a contact is added, the workflow is triggered and the contact is moved from the master contact list to a welcome series list. This keeps the contact from receiving other marketing messages from you while they are being engaged as part of the Welcome Series workflow, which prevents the contact from feeling bombarded by messages right after opt-in.

Contacts in this workflow are sent two welcome messages that you designed. These messages should introduce the new subscriber to what your brand is all about. The first message is sent right after the contact is moved to the welcome series list. After a period of time you specify, the default is 2 days, the contact is sent a second welcome message and is then moved from the welcome series list back to the master list.

After you make a copy of the workflow template, you can adjust the workflow to best suit your needs. For example, if you want to expand the Welcome Series workflow beyond two messages, you can add additional message and delay nodes to send contacts additional messages.

Before you use the Welcome Series workflow template to set up your Welcome Series workflow, you need to:

- Create the list you want to temporarily move contacts to while they are in this workflow. For more information see Create A List on page 534.
- Create the emails you want to send to new contacts. For more information see Create Email: Message Editor on page 48.

Note: The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.
What you need to do:

1. Go to Automation > Workflows.

2. Copy the Welcome Series Template:
   a) In the Template Workflows section, select the box for Welcome Series Template.
   b) Click Copy.
   
   A window appears asking if you are sure you want to copy the template.
   c) Click Copy.

3. In the Your Workflows list, click on the name of the copy you made.

   The copy of the template opens in the workflow builder.

4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the Name box.
   c) Enter a new description in the Description box.
   d) Click Ok.

5. In the Identifies All New Subscribers node, indicate whether you want contacts with an onboarding or active status to be included in this workflow.

6. In the Add to Temporary 'Welcome Series' List node
   a) Click a specific list.
   b) Click on the welcome series list you set up for this workflow then click Select.

7. In the Temporarily Remove from 'Master List' node
   a) Click a specific list.
   b) Click on the master list you set up for your contacts then click Select.

   It is possible that you may not have set up a master list for your contacts. If this is the case, then you do not need to use this node.

8. In the Send Welcome Message #1 node, select the email message that will be sent when a contact is added:
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.

   If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.

   If you already see your email address here you can skip this step.
   d) Click the bold text on for Sender authentication if you wish to disable this feature.
   e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

   For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

9. In the Wait for 2 Days (Or More/Less) node click 2 days if you want to change the amount of time that will pass before a contact receives the second welcome message. If you clicked 2 days
   a) Enter a new number in the Wait for box.
   b) Select a measurement of time from the Days list.
   c) Click Done.

10. In the Send Welcome Message #2 node, select second the email message that will be sent after the specified delay time:
a) Click **an email message** in the node text, click the name of the email message you want to send, then click **Select**.

b) Click **a name** in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.

If you already see the correct name here you can skip this step.

c) Click **email address** in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.

If you already see your email address here you can skip this step.

d) Click the bold text **on** for Sender authentication if you wish to disable this feature.

e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

11. Optional: If you want to change the amount of time that will pass before a contact is removed from the welcome series list:

   a) In the **Wait for an Add'l 2 Days** node, click **2 days**.
   
   b) Enter a new number in the **Wait for** box.
   
   c) Select a measurement of time from the **Days** list.
   
   d) Click **Done**.

12. In the **Add Back to 'Master List'** node

   a) Click a **specific list**.
   
   b) Click on the list you want contacts to be moved to when they complete the welcome series then click **Select**.

13. In the **Remove from 'Welcome Series' List** node

   a) Click a **specific list**.
   
   b) Click on the list you added your contacts to for the welcome series workflow then click **Select**.

14. Click **Save Changes**.

15. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.

   The workflow starts working immediately after it is activated, so only do this if you want to start sending your welcome messages to new contacts.

**Welcome Message w/ Purchase History Check Workflow Template**

The **Welcome Message w/ Purchase History Check** workflow template allows you to send new contacts different welcome messages based on whether contacts added to your account have order data.

The **Welcome Message w/ Purchase History Check** workflow template starts when a contact is added to your account. By default, contacts who move from transactional to onboarding status are also included. When the workflow is triggered it checks whether a new contact has order data in Bronto and sends the contact one of two welcome messages based on this information. A delay node is included in the workflow so that all order data for your contacts finishes importing before the contacts move through the workflow.

Before you use the **Welcome Message w/ Purchase History Check** workflow template you need to create the messages you want to send with this workflow. For more information, see Create Email: Message Editor on page 48. The message you send to contacts who have made an order acknowledge their order and/or indicate you appreciate their business. We recommend the message you send to contacts who do not have order data in Bronto includes a coupon or discount on their first order.

**Note:** The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to Automation > Workflows.
2. Copy the **Welcome Message w/ Purchase History Check Template**:
   a) In the Template Workflows section, select the box for **Welcome Message w/ Purchase History Check Template**.
   b) Click **Copy**.
      A window appears asking if you are sure you want to copy the template.
   c) Click **Copy**.
3. In the **Your Workflows** list, click on the name of the copy you made.
   The copy of the template opens in the workflow builder.
4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the **Name** box.
   c) Enter a new description in the **Description** box.
   d) Click **Ok**.
5. In the **Identifies All New Subscribers** node, indicate whether you want contacts with an onboarding or active status to be included in this workflow.
6. Optional: In the **Small Delay, Ensure All Info is Imported** node, adjust the delay time if you want a delay longer or shorter than 15 minutes.
   You may want to make the delay longer if you are importing a large number of contacts. Also, for this workflow you should always keep the delay node set to a relative period of time.
   a) Click **15 minutes** in the node text.
   b) If desired, select a new unit of time from the **Minutes** list.
   c) Enter a new length of time in the **15** box.
   d) Click **Done**.
7. Leave **Check To See If User Has Ever Purchased** unchanged.
   This node will look at the order data for each contact who enters the workflow. If Bronto has order data for the contact then they will be sent the **If Yes, Send Welcome Msg + Thank You** node's email. Otherwise, they will be sent the **If No, Send Welcome Msg + Coupon/Offer** email.
8. In the **If Yes, Send Welcome Msg + Thank You** node, select the email message that will be sent to the contact:
   This email should thank the contact for their purchase.
   a) Click an **email message** in the node text, click the name of the email message you want to send, then click **Select**.
   b) Click a **name** in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.
      If you already see the correct name here you can skip this step.
   c) Click an **email address** in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.
      If you already see your email address here you can skip this step.
   d) Click the bold text **on** for Sender authentication if you wish to disable this feature.
   e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.
      For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.
9. In the **If No, Send Welcome Msg + Coupon/Offer** node, select the email message that will be sent to the contact:
   We recommend this email encourages the contact to make their first purchase by including a coupon or other offer.

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a) Click **an email message** in the node text, click the name of the email message you want to send, then click **Select**.

b) Click **a name** in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.

If you already see the correct name here you can skip this step.

c) Click **email address** in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.

If you already see your email address here you can skip this step.

d) Click the bold text **on** for Sender authentication if you wish to disable this feature.

e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

10. Click **Save Changes**.

11. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.

   The workflow starts working immediately after it is activated, so only do this if you want to start sending your welcome messages to new contacts.

**Welcome Message w/ Manage Preferences Workflow Template**

The **Welcome Message w/ Manage Preferences** workflow template allows you to send a new contact a welcome message that requests the contact provides additional personal information when the contact is added to your account. After a delay, contacts who did not submit a Manage Preferences webform are sent a second message that encourages them to complete the webform.

The **Welcome Message w/ Manage Preferences** workflow template starts when a contact is added to your account. When a contact is added, the workflow is triggered and the contact is moved from the master contact list to a welcome message list. This keeps the contact from receiving other marketing messages from you while they are being engaged as part of the **Welcome Message w/ Manage Preferences** workflow, which prevents the contact from feeling bombarded by messages right after opt-in.

Contacts in this workflow are sent a message that includes a request to complete a Manage Preferences webform. Contacts who complete the webform within the delay time are moved back to the master list. Contacts who do not submit the webform are sent a second email request. We recommend the second request includes an incentive for completing the webform. After a second delay, all contacts who are still on the welcome message list are moved back to the master list regardless of whether they completed the Manage Preferences webform.

Before you use the **Welcome Series** workflow template to set up your **Welcome Series** workflow, you need to:

- Create the list you want to temporally move contacts to while they are in this workflow. For more information see Create A List on page 534.
- Have a Manage Preference webform. For more information see Types of Webforms on page 204.
- Create the emails you want to send with this workflow. For more information see Create Email: Message Editor on page 48. The emails you create should include a link to your Manage Preferences webform. We recommend the second email you send includes an incentive to complete the webform, since the first email request wasn't successful.

**Note:** The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to **Automation > Workflows**.

2. Copy the **Welcome Message w/ Manage Preferences Template**:

   a) In the Template Workflows section, select the box for **Welcome Message w/ Manage Preferences Template**.
b) Click Copy.
   A window appears asking if you are sure you want to copy the template.
c) Click Copy.

3. In the Your Workflows list, click on the name of the copy you made.
   The copy of the template opens in the workflow builder.

4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the Name box.
   c) Enter a new description in the Description box.
   d) Click Ok.

5. In the Identifies All New Subscribers node, indicate whether you want contacts with an onboarding or active status to be included in this workflow.

6. In the Temporary Add to 'Welcome Message' List node
   a) Click a specific list.
   b) Click on the welcome message list you set up for this workflow and then click Select.

7. In the Temporarily Remove from 'Master List' node
   a) Click a specific list.
   b) Click on the master list you set up for your contacts then click Select.

   It is possible that you may not have set up a master list for your contacts. If this is the case, you do not need to use this node and should remove it from the workflow.

8. In the Send Welcome Message #1 w/ Manage Pref CTA node, select the email message that will be sent when a contact is added:

   This email should include a link to your Manage Preferences webform.
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.

   If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.

   If you already see your email address here you can skip this step.
   d) Click the bold text on for Sender authentication if you wish to disable this feature.
   e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

   For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

9. Optional: If you want to change the default amount of time contacts have to complete the webform after the first email:
   a) In the Wait 1 Week for Cust to Submit Webform in Msg #1 node click 7 days.
   b) Enter a new number in the 7 box.
   c) Select the relevant measurement of time from the Days list.
   d) Click Done.

10. In the If No Form Usage, Send Reminder Msg #2 node, select the second email message that will be sent after the specified delay time if a contact did not submit the Manage Preferences form:

    We recommend this email includes an incentive to complete the form.
a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.

If you already see the correct name here you can skip this step.
c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.

If you already see your email address here you can skip this step.
d) Click the bold text on for Sender authentication if you wish to disable this feature.
e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

11. Leave the Wait 2 Days Before Reassigning Lists node unchanged.

12. In the Add Back to 'Master List' node
   a) Click a specific list.
   b) Click on the list you want contacts to be moved to when they complete the welcome series then click Select.

13. In the Remove from 'Welcome Message' List node
   a) Click a specific list.
   b) Click on the list you added your contacts to for the workflow then click Select.

14. Click Save Changes.

15. If you are ready to start using your workflow, click the Inactive toggle to activate the workflow.

   The workflow starts working immediately after it is activated, so only do this if you want to start sending your welcome messages to new contacts.

VIP Campaign Message Workflow Template

The VIP Campaign Message workflow template allows you to send a thank you message and offer special discounts to contacts who have been identified as high spenders.

The VIP Campaign Message workflow template is triggered when contacts are added to a specific segment. This workflow can be used to target either contacts who spend over a certain dollar amount or contacts who order a large quantity of products. You'll use the settings for the segment to determine which group of contacts this workflow targets. When contacts enter this workflow they are sent a message that acknowledges their orders and, if desired, includes a coupon.

Before you use the VIP Campaign Message workflow template you need to:

• Create a new custom contact field that can be used to indicate the contact has received the message from this workflow. This field should be a check box. For more information see Create Custom Contact Fields on page 562.
• Create the segment that is used to trigger the workflow. For more information see Create A Segment Based On The Total Revenue Recorded For Contacts on page 459 or Create Segments Based On Contact RFM Metrics on page 462.
• Create the message this workflow will send to contacts. For more information, see Create Email: Message Editor on page 48.

Note: The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to Automation > Workflows.
2. Copy the VIP Campaign Message Template:
a) In the Template Workflows section, select the box for **VIP Campaign Message Template**.
b) Click **Copy**.
   A window appears asking if you are sure you want to copy the template.
c) Click **Copy**.

3. In the **Your Workflows** list, click on the name of the copy you made.
The copy of the template opens in the workflow builder.

4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the **Name** box.
   c) Enter a new description in the **Description** box.
   d) Click **Ok**.

5. In the **Use Segment Template for "VIP Purchasers"** node, indicate what segment you want to use to trigger the workflow:
   a) Click a segment located in the node text.
   b) Click on the name of the segment you want to use.
   c) Click **Select**.

6. In the **Send VIP Congratulations Message** node, select the email message that will be sent to the contact:
   a) Click an email message in the node text, click the name of the email message you want to send, then click **Select**.
   b) Click a name in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.
      If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.
      If you already see your email address here you can skip this step.
   d) Click the bold text **on** for Sender authentication if you wish to disable this feature.
   e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

   For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

7. In the **Change 'VIP Contact' Checkbox to Checked** node, set the workflow to update the custom node with a verification that the contact received this email.
   a) Click field, click on the custom field you created for this workflow, then click **Select**.
   b) Click not checked, click in the checkbox so it is checked, then click **Done**.

8. Click **Save Changes**.

9. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.
The workflow starts working immediately after it is activated, so only do this if you want to start sending your welcome messages to new contacts.

**Post Purchase Series Workflow Template**
The **Post Purchase Series** workflow template allows you to send contacts who placed an order a two-email series of messages that thanks the contacts for their order(s).

By default, the **Post Purchase Series** workflow template is triggered when Bronto receives an order with a **Last Order Date** that matches the current date. The workflow includes contact throttling, so a single contact can only enter the workflow once every three months, even if the contact has made more than one order within that time frame. This keeps contacts who order frequently from being overwhelmed by messages. You can edit the throttle by clicking the contact throttling setting in the workflow builder.
After a two-day delay, a contact in this workflow is sent a message that you designed. Then, after a second two-day delay, the contact is sent a second message. The length of time for either delay can be adjusted. Messages sent with this workflow should thank or follow up with a contact regarding their order.

Before you use the Post Purchase Series workflow template to set up your Post Purchase Series workflow, you need to:

- Create the list you want to temporarily move contacts to while they are in this workflow. For more information see Create A List on page 534.
- Create the emails this workflow will send. For more information see Create Email: Message Editor on page 48.

**Note:** The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to Automation > Workflows.
2. Copy the Post Purchase Series Template:
   a) In the Template Workflows section, select the box for Post Purchase Series Template.
   b) Click Copy.
   A window appears asking if you are sure you want to copy the template.
   c) Click Copy.
3. In the Your Workflows list, click on the name of the copy you made.
   The copy of the template opens in the workflow builder.
4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the Name box.
   c) Enter a new description in the Description box.
   d) Click Ok.
5. We recommend you do not edit the Identify Who Purchased Today node.
   If left as is, this node will trigger on the current day's orders.
6. In the Add to Temporary 'Welcome Series' List node
   a) Click a specific list.
   b) Click on the welcome series list you set up for this workflow then click Select.
7. In the Wait 2 Days After Order node click 2 days if you want to change the length of time that passes before a contact receives the first message. If you clicked 2 days:
   a) Select a new unit of time from the Days list, enter a new number in the Wait for box, and click Done.
   b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click OK.
8. In the Send Follow-Up Message #1 node, select the first message that will be sent:
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.
   If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.
   If you already see your email address here you can skip this step.
   d) Click the bold text on for Sender authentication if you wish to disable this feature.
   e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.
Automate

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

9. In the **Wait Another 2 Days** node click **2 days** if you want to change the length of time that passes before a contact receives the second message. If you clicked **2 days**:
   a) Select a new unit of time from the **Days** list, enter a new number in the **Wait for** box, and click **Done**.
   b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click **OK**.

10. In the **Send Welcome Message #2** node, select the second message that will be sent after the specified delay time:
    a) Click **an email message** in the node text, click the name of the email message you want to send, then click **Select**.
    b) Click **a name** in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.
    If you already see the correct name here you can skip this step.
    c) Click **email address** in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.
    If you already see your email address here you can skip this step.
    d) Click the bold text **on** for Sender authentication if you wish to disable this feature.
    e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

11. **Optional**: If you want to expand the workflow to send additional emails:
    a) Add the appropriate Delay and Send Email nodes to the canvas.
    b) Adjust the settings for those nodes.
    c) Connect the nodes to the workflow.

12. **Click** **Save Changes**.

13. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.

The workflow starts working immediately after it is activated, so only do this when you want to start sending messages to contacts.

**Never Purchased Series Workflow Template**

The **Never Purchased Series** workflow template allows you to identify and send a message to contacts who receive your emails but have not placed an order. If a contact does not place an order after receiving the first message in the series a second message is sent.

The **Never Purchased Series** workflow template is triggered when contacts are added to a specific segment. This workflow can be used to target contacts on a segment that identifies contacts who have opened and/or clicked but have not converted. You'll use the settings for the segment to identify these contacts. When contacts enter this workflow they are sent a message that encourages them to place an order by including a coupon or other offer. Any contacts who don't place an order within a delay period are sent a second message. You might want to consider including a larger incentive in the second message.

Before you use the **Never Purchased Series** workflow template you need to:

- Create the segment that is used to trigger the workflow.
- Create the messages that are sent by this workflow. For more information, see Create Email: Message Editor on page 48.

**Note:** The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:
1. Go to Automation > Workflows.

2. Copy the Never Purchased Series workflow template:
   a) In the Template Workflows section, select the box for Never Purchased Series.
   b) Click Copy.
      A window appears asking if you are sure you want to copy the template.
   c) Click Copy.

3. In the Your Workflows list, click on the name of the copy you made.
   The copy of the template opens in the workflow builder.

4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the Name box.
   c) Enter a new description in the Description box.
   d) Click Ok.

5. In the Use Segment Template for "Never Purchased" to identify non-buyers node, indicate what segment you want to use to trigger the workflow:
   a) Click a segment located in the node text.
   b) Click on the name of the segment you want to use.
   c) Click Select.

6. In the Send Message #1 node, select the email message that will be sent to the contact:
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.
      If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.
      If you already see your email address here you can skip this step.
   d) Click the bold text on for Sender authentication if you wish to disable this feature.
   e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.
      For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

7. In the Wait 2 Weeks To See If Order Placed node click 14 days if you want to change the length of time a contact has to place an order. If you clicked 14 days:
   a) Select a new unit of time from the Days list, enter a new number in the Wait for box, and click Done.
   b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click OK.

8. Do not edit the Check For Any Orders On File node.
   If left as is this node will check if a contact in this workflow has placed an order. If the contact has placed an order, they will not receive the second message in this series.

9. In the If Still No Orders, Send Message #2 node, select the email message that will be sent to the contact:
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.
      If you already see the correct name here you can skip this step.
c) Click **email address** in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.

If you already see your email address here you can skip this step.

d) Click the bold text **on** for Sender authentication if you wish to disable this feature.

e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see **Sender Authentication And Reply Tracking For Emails**. For more information about frequency caps see **Set Email Frequency Caps For Your Account** on page 1330.

10. **Optional**: If you want to expand the workflow to send additional emails

   a) Add the appropriate Delay, Contact Field Comparison, and Send Email nodes to the canvas.
   
   b) Adjust the settings for those nodes.
   
   c) Connect the nodes to the workflow.

11. Click **Save Changes**.

12. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.

   The workflow starts working immediately after it is activated, so only do this when you want to start sending your messages to contacts.

**Lapsed Purchaser Series Workflow Template**

The **Lapsed Purchaser Series** workflow template allows you to identify and send a message to contacts who have only placed one order within a set amount of time. If a contact does not place an order after receiving the first message in the series a second message is sent.

The **Lapsed Purchaser Series** workflow template is triggered when contacts are added to a specific segment. This workflow can be used to target contacts on a segment that identifies contacts who have placed an order but have not ordered again since that order. You'll use the settings for the segment to identify these contacts. The workflow includes contact throttling, so a single contact can only enter the workflow once every six months. You can edit the throttle by clicking the contact throttling setting in the workflow builder.

When contacts enter this workflow they are sent a message that encourages them to place an order by including a coupon or other offer. Any contacts who don't place an order within the workflow's delay period are sent a second message. You might want to consider including a larger incentive in the second message.

Before you use the **Lapsed Purchaser Series** workflow template you need to:

- Create the segment that is used to trigger the workflow.
- Create the messages contacts with this workflow are sent. For more information, see **Create Email: Message Editor** on page 48

riages: The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to **Automation > Workflows**.

2. Copy the **Lapsed Purchaser Series** workflow template:
   
a) In the Template Workflows section, select the box for **Lapsed Purchaser Series**.
   
b) Click **Copy**.
   
   A window appears asking if you are sure you want to copy the template.
   
c) Click **Copy**.

3. In the **Your Workflows** list, click on the name of the copy you made.

   The copy of the template opens in the workflow builder.

4. To edit the name and/or description of the workflow:
   
a) Click on the workflow name, located above the workflow builder.
b) Enter a new name in the **Name** box.
c) Enter a new description in the **Description** box.
d) Click **Ok**.

5. In the **Use Segment Template for "Lapsed Purchaser"** node, indicate the segment you want to use to trigger the workflow:
   a) Click a segment located in the node text.
   b) Click on the name of the segment you want to use.
   c) Click **Select**.

6. In the **Send Reminder Message #1** node, select the first email message that will be sent to the contact:
   This message should offer an incentive to place an order.
   a) Click an email message in the node text, click the name of the email message you want to send, then click **Select**.
   b) Click a name in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.
      If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.
      If you already see your email address here you can skip this step.
   d) Click the bold text **on** for Sender authentication if you wish to disable this feature.
   e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.
      For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

7. In the **Wait 2 Weeks To See If They Order** node click **14 days** if you want to change the length of time a contact has to place an order. Only if you clicked **14 days**:
   a) Select a new unit of time from the **Days** list, enter a new number in the **Wait for** box, and click **Done**.
   b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click **OK**.

8. Do not edit the **Check For Recent Orders** node unless you edited the **Wait 2 Weeks To See If They Order** node. If you did edit the previous node, make sure this node matches those settings:
   If left as is, this node will check if a contact in this workflow has placed an order within the last two weeks. If the contact has placed an order, they will not receive the second message in this series.
   a) Click **2 weeks** in the node text.
   b) Select a new unit of time from the **Weeks** list, enter a new number in the **Relative Date Value** box, and click **Done**.
   c) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click **OK**.

9. In the **If No Orders, Send Reminder Message #2** node, select the email message that will be sent to contacts who did not make an order:
   This message should offer an incentive to order. The incentive can be larger than the last message or you could include the phrase "last chance" in this message to promote a sense of urgency.
   a) Click an email message in the node text, click the name of the email message you want to send, then click **Select**.
   b) Click a name in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.
      If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.
If you already see your email address here you can skip this step.

d) Click the bold text **on** for Sender authentication if you wish to disable this feature.

e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

10. **Optional**: If you want to expand the workflow to send additional emails:

   a) Add the appropriate Delay, Contact Field Comparison, and Send Email nodes to the canvas.
   
   b) Adjust the settings for those nodes.
   
   c) Connect the nodes to the workflow.

11. Click **Save Changes**.

12. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.

   The workflow starts working immediately after it is activated, so only do this when you want to start sending messages to contacts.

**Non-Engaged Series Workflow Template**

The **Non-Engaged Series** workflow template allows you to try to convert non-engaged contacts through a two-message series. Contacts who do not engage after the second message in the series are unsubscribed.

The **Non-Engaged Series** workflow template is triggered when contacts are added to a specific segment. This workflow is used to target contacts on a segment that identifies contacts who have no recent history of opens or clicks. You'll use the settings for the segment to identify these contacts. When contacts enter this workflow they are sent a message that encourages engagement. This could be in the form of offering a discount or using phrasing that indicates the message is a final notice. Any contacts who don't engage with the first message within a delay period are sent a second message. If contacts do not engage with either the first or second message they are unsubscribed. This keeps you from spending valuable resources on contacts who do not offer a return on your investment. Unsubscribed contacts can be resubscribed at any time.

Before you use the **Non-Engaged Series** workflow template you need to:

- Create the segment that is used to trigger the workflow. For more information see Create A Segment Based On Non-Engaged Contacts on page 458.
- Create the list you want to temporarily move contacts to while they are in this workflow. For more information see Create A List on page 534.
- Create the messages you send to contacts with this workflow. For more information, see Create Email: Message Editor on page 48.

**Note**: The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to **Automation > Workflows**.

2. Copy the **Non-Engaged Series** template:
   
   a) In the Template Workflows section, select the box for **Non-Engaged Series**.
   
   b) Click **Copy**.
   
   A window appears asking if you are sure you want to copy the template.
   
   c) Click **Copy**.

3. In the **Your Workflows** list, click on the name of the copy you made.

   The copy of the template opens in the workflow builder.

4. To edit the name and/or description of the workflow:
   
   a) Click on the workflow name, located above the workflow builder.
b) Enter a new name in the Name box.
c) Enter a new description in the Description box.
d) Click Ok.

5. In the Use Segment Template for "Non-Engaged Subscribers" node, indicate what segment you want to use to trigger the workflow:
   a) Click a segment located in the node text.
   b) Click on the name of the segment you want to use.
   c) Click Select.

6. In the Remove Non-Engaged from 'Master List' node:
   a) Click a specific list.
   b) Click on the master list you set up for your contacts then click Select.

   It is possible that you may not have set up a master list for your contacts. If this is the case, then you do not need to use this node.

   This node prevents the contact from receiving other marketing messages from you while they are in this workflow.

7. In the Send Re-engagement Message #1 node, select the email message that will be sent to the contact:
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.

   If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.

   If you already see your email address here you can skip this step.
   d) Click the bold text on for Sender authentication if you wish to disable this feature.
   e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

   For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

8. In the Give Contact 2 Weeks to Open or Engage node click 14 days if you want to change the length of time a contact has to engage with the first message. If you clicked 14 days:
   a) Select a new unit of time from the Days list, enter a new number in the Wait for box, and click Done.
   b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click OK.

9. In the Is Contact Still on Non-Engaged Subscriber Segment? node, use segment membership to verify whether contacts have engaged with the first message:

   Your segment settings will move a contact off of the non-engaged contact segment if/when the contact engages with a message. Contacts who have engaged with the first message in the series are moved back onto your master list and removed from the workflow.
   a) Click a segment located in the node text.
   b) Click on the name of the segment you want to use.
   c) Click Select.

10. In the If Contact Still Non-Engaged, Send Message #2 node, select the email message that will be sent to the contact:
   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.

   If you already see the correct name here you can skip this step.
c) Click **email address** in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.

If you already see your email address here you can skip this step.

d) Click the bold text **on** for Sender authentication if you wish to disable this feature.

e) Click the bold text **off** for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see **Sender Authentication And Reply Tracking For Emails**. For more information about frequency caps see **Set Email Frequency Caps For Your Account** on page 1330.

### 11. In the **Give Contact Another 2 Weeks to Open Message #2** node click **14 days** if you want to change the length of time a contact has to engage with the second message. If you clicked **14 days**:

a) Select a new unit of time from the **Days** list, enter a new number in the **Wait for** box, and click **Done**.

b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click **OK**.

### 12. In the second **Is Contact Still on Non-Engaged Subscriber Segment?** node, use segment membership to verify whether contacts have engaged with the second message:

Your segment settings will move a contact off of the non-engaged contact segment if/when the contact engages with a message. Contacts who have engaged with the second message in the series are moved back onto your master list. Contacts who have not engaged are unsubscribed.

a) Click a **segment** located in the node text.

b) Click on the name of the segment you want to use.

c) Click **Select**.

### 13. You cannot change the **If Still Unengaged, Unsubscribe Contact** node.

This node will unsubscribe contacts who have failed to engage with either of the messages sent in this series.

### 14. Optional: If you want to expand the workflow to send additional emails:

a) Add the appropriate Delay, Segment Membership, and Send Email nodes to the canvas.

b) Adjust the settings for those nodes.

c) Connect the nodes to the workflow.

The **If Still Unengaged, Unsubscribe Contact** node must remain the last node in the workflow.

### 15. Click **Save Changes**.

### 16. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.

The workflow starts working immediately after it is activated, so only do this when you want to start sending messages to contacts.

### Cart Recovery Series Workflow Template

The **Cart Recovery Series** workflow template allows you to automatically send a series of emails that attempt to convert lost revenue when the Cart Recovery app identifies an abandoned cart.

**Important:** You can only use the **Cart Recovery Series** workflow template if you have the Cart Recovery app. If you do not have the app, the nodes in the workflow will not work.

The **Cart Recovery Series** workflow template is triggered when contacts have abandoned a cart. The settings that determine what constitutes an abandoned cart are configured in the Cart Recovery app. For more information see **Adjust Cart Recovery App Settings** on page 1479.

When the app indicates to Bronto that a cart has been abandoned, you can use this template to send contacts a transactional email reminder about the cart they have abandoned. The contact is given time to complete the purchase and if the cart is still abandoned after that period of time has passed, the default is 24 hours, they are sent a second marketing message that encourages conversion. By default this workflow only sends a second message to contacts whose carts are still in abandoned status, but it can be modified to also send a message to contacts whose cart status has changed from abandoned to active or complete. For example, you might want to send contacts an extra incentive
to convert if the cart status is active because this indicates they are revisiting the purchase. This is just one example of how you can customize the template. You can add, remove, or build upon the template however you see fit.

The workflow includes contact throttling, so a single contact can only enter the workflow once every month. You can edit the throttle by clicking the contact throttling setting in the workflow builder.

Before you use the **Cart Recovery Series** workflow template you need to create messages that can steer the customer back to the website to complete a purchase. Make sure you use cart and order tags in your message so that contacts can see the details about their abandoned items. For more information, see Create Email: Message Editor on page 48. The first message can be approved for transactional sending. Allow 1-2 business days for Deliverability approval before the message can be sent. See Request Transactional Message Approval on page 299 for more information.

Note: The node labels in this template have been renamed to help guide you through the template. To see which nodes were used, mouse over the node label. You can also edit any of these custom labels.

What you need to do:

1. Go to **Automation > Workflows**.
2. Copy the **Cart Recovery Series** workflow template:
   a) In the Template Workflows section, select the box for **Cart Recovery Series**.
   b) Click **Copy**.
   A window appears asking if you are sure you want to copy the template.
   c) Click **Copy**.
3. In the **Your Workflows** list, click on the name of the copy you made.
   The copy of the template opens in the workflow builder.
4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the **Name** box.
   c) Enter a new description in the **Description** box.
   d) Click **Ok**.
5. In the **Cart Is Abandoned** node, configure what exceptions you want to make to the trigger criteria:
   By default, previously abandoned carts and contacts who have placed an order in the last seven days are excluded from the workflow.
   a) Optional: To include previously abandoned carts, click **will not** located in the node text, select **will**, then click **Done**.
   b) Optional: To change the length of time that passed since a contact's last order before the contact can enter this workflow, click **7 days**, select a unit of time from the **days** list, enter the corresponding length of time in the **7** box, then click **Done**.
6. In the **Send Reminder Message #1** node, select the first email message that will be sent to the contact:
   This message should offer an incentive to place an order. If you would rather send a marketing message, change transactional to marketing.
   a) Click an **email message** in the node text, click the name of the email message you want to send, then click **Select**.
   b) Click a **name** in the node text, enter the from name to be used for the email message in the **From Name** text box, then click **Done**.
   If you already see the correct name here you can skip this step.
   c) Click **email address** in the node text, enter the email address to be used for the message in the **Email Address** text box, then click **Done**.
   If you already see your email address here you can skip this step.
   d) Click the bold text **on** for Sender authentication if you wish to disable this feature.
e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

7. In the Wait 2 Days node click 2 days if you want to change the length of time a contact has to place an order. Only if you clicked 2 days:
   a) Select a new unit of time from the Days list, enter a new number in the Wait for box, and click Done.
   b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click OK.

8. You cannot edit the Check If Cart Is Still Abandoned node.

9. In the Verify No Other Recent Purchases node click 2 days if you want to change the length of time that the node checks for recent orders. Only if you clicked 2 days:
   a) Select a new unit of time from the Days list, enter a new number in the Wait for box, and click Done.
   b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click OK.

10. In the If No Orders, Send Reminder Message #2 node, select the email message that will be sent to contacts who still have an abandoned cart did not place an order:

This message should offer an incentive to order. The incentive can be larger than the last message or you could include the phrase "last chance" in this message to promote a sense of urgency.

   a) Click an email message in the node text, click the name of the email message you want to send, then click Select.
   b) Click a name in the node text, enter the from name to be used for the email message in the From Name text box, then click Done.
       If you already see the correct name here you can skip this step.
   c) Click email address in the node text, enter the email address to be used for the message in the Email Address text box, then click Done.
       If you already see your email address here you can skip this step.
   d) Click the bold text on for Sender authentication if you wish to disable this feature.
   e) Click the bold text off for Reply Tracking and/or Frequency cap overrides if you wish to enable either of these features.

   For more information about sender authentication or reply tracking see Sender Authentication And Reply Tracking For Emails. For more information about frequency caps see Set Email Frequency Caps For Your Account on page 1330.

11. Optional: If you want to expand the workflow to send additional emails:
   a) Add the appropriate Delay, Contact Field Comparison, and Send Email nodes to the canvas.
   b) Adjust the settings for those nodes.
   c) Connect the nodes to the workflow.

12. Click Save Changes.

13. If you are ready to start using your workflow, click the Inactive toggle to activate the workflow.

The workflow starts working immediately after it is activated, so only do this when you want to start sending messages to contacts.

**SMS Opt-In w/ Request for Email Workflow Template**

The SMS Opt-In w/ Request for Email Address workflow template allows you to send contacts a welcome SMS message when they subscribe to an SMS keyword.

**Important:** You can only use this template if you have purchased SMS and have SMS Keywords on page 259. This workflow will not work with Text-To-Join.
The **SMS Opt-In w/ Request for Email Address** workflow template is triggered when a contact subscribes to an SMS keyword. By default, the workflow is set up to send a newly subscribed contact an SMS message that requests their email address, but can be modified to collect any other relevant contact data (first name, zip code etc.). If the contact sends a valid email address, the contact's email in Bronto is updated and they are sent a thank you SMS. When the email address provided already exists in the account, the SMS record and the email record are merged. No data will be lost.

If the contact does not send an SMS response with a valid email address, the contact is sent a second SMS request after a delay. After either a response containing the email address or the second SMS request is sent, the SMS session is ended. If a contact does not respond to the SMS requests, they are moved to a list for evaluation.

Because it is a paid service, when you send SMS messages you must comply with the CAN-SPAM Act of 2003, the rules of the Mobile Marketing Association, and Bronto's Permission Marketing Policy. This means:

- Any time you promote signing up for an SMS campaign, you must include certain language. For more information see [SMS Sign Up Campaigns](#) on page 277.
- You must have properly formatted SMS responses that are sent when a contact sends a STOP or HELP message. Bronto automatically provides a default STOP and HELP response, but you can customize some of this content to be specific to your account. For more information see [SMS Integration Settings](#) on page 1279.
- Any SMS or MMS message you send must include Text STOP to end in the body of your SMS message. For more information see [Create An SMS or MMS Message](#) on page 253.

Before you use the **SMS Opt-In w/ Request for Email Address** workflow template you need to:

- Create the SMS keyword that will trigger the workflow. For more information see [Create SMS Keywords](#) on page 261.
- Create the SMS messages this workflow will send. For more information see [Create An SMS or MMS Message](#) on page 253.
- Create the list you want to move contacts to for evaluation if they do not respond to the SMS messages sent by this workflow. For more information see [Create A List](#) on page 534.

What you need to do:

1. Go to Automation > Workflows.
2. Copy the **SMS Opt-In w/ Request for Email Address** template:
   a) In the Template Workflows section, select the box for **SMS Opt-In w/ Request for Email Address**.
   b) Click Copy.
      
      A window appears asking if you are sure you want to copy the template.
   c) Click Copy.
3. In the **Your Workflows** list, click on the name of the copy you made.
   
   The copy of the template opens in the workflow builder.
4. To edit the name and/or description of the workflow:
   a) Click on the workflow name, located above the workflow builder.
   b) Enter a new name in the Name box.
   c) Enter a new description in the Description box.
   d) Click Ok.
5. In the **Initial Incoming SMS With Keyword** node
   a) Click to a specific keyword.
   b) Click on the SMS keyword you want to trigger this workflow then click Select.
6. In the **Send SMS message asking for email address** node
   a) Click an SMS message.
   b) Click on the welcome SMS message you set up for this workflow then click Select.
7. In the **Has customer responded to last SMS message?** node click 2 hours if you want to change the length of time that passes before a contact's response is evaluated. If you clicked 2 hours:
This is essentially the length of time that will pass before the contact is sent a follow up SMS message if they do not respond to the first request.

a) Select a new unit of time from the **Hours** list, enter a new number in the **Wait for** box, and click **Done**.

b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click **OK**.

8. In the **Did that response contain a valid email address?** node

Be sure to select the SMS message you sent using the **Send SMS message asking for email address** node.

a) Click **some content**.

b) Select **Use Content From A Previous Node**, select **Content From SMS Reply** from the list, and then click **Done**.

9. So not change the **Change contact's email address to the one provided** node.

If the contact provides an email address, that email will be added to the contact's data. If the email address provided already exists in the account, the SMS record and the email record are merged.

10. In the **Send reminder SMS that you have not rcvd valid email yet** node, select the second SMS that will be sent:

a) Click an **SMS message**.

b) Click on the SMS message you set up for this workflow then click **Select**.

11. In the **Have they responded to the reminder SMS?** node click **2 hours** if you want to change the length of time that passes before a contact receives the second message. If you clicked **2 hours**:

a) Select a new unit of time from the **Hours** list, enter a new number in the **Wait for** box, and click **Done**.

b) Click the pencil icon in the heading of the node, update the label to reflect the new delay, and click **OK**.

12. In the **Did that response contain a valid email address?** node

Be sure to select the SMS message you sent using the **Send reminder SMS that you have not rcvd valid email yet** node.

a) Click **some content**.

b) Select **Use Content From A Previous Node**, select **Content From SMS Reply** from the list, and then click **Done**.

13. In the **Move user to a PENDING list so you can manually review** node

Any contact who subscribed to the keyword but failed to reply to the SMS is added to this list.

a) Click a **specific list**.

b) Click on the welcome series list you set up for this workflow then click **Select**.

14. In the **Send SMS confirming email receipt, thanks for subscribing** node

a) Click an **SMS message**.

b) Click on the thank you SMS message you set up for this workflow then click **Select**.

15. You cannot edit the **Stop SMS Session. Recommended as last node for all SMS workflows.** node.

While you can remove this node, you should not. This node will end the SMS session for the current keyword, which allows the next time the cell phone texts the same SMS keyword to be recognized as a new keyword and not another response to this keyword.

16. If you are ready to start using your workflow, click the **Inactive** toggle to activate the workflow.

The workflow starts working immediately after it is activated, so only do this when you want to start sending messages to contacts.

### Activate or Deactivate A Workflow

Activating/deactivating a workflow allows you to change the status of a workflow.

You can change the status to active or inactive. Each status is described below:
• **Active** - Active workflows are "live" workflows where contacts are moving through them and actions (emails being sent, fields updating, etc.) are being performed.

• **Inactive** - Inactive workflows do not process contacts and no actions are performed.

**Note:** Active workflows process contacts (via triggers and filters) and perform actions (send emails, update fields, etc.). Inactive workflows do not process contacts or perform actions.

To change the status of a workflow:

1. Go to **Automation > Workflows**.
2. Find the row of the workflow you want to make active/inactive.

   Active workflows have this icon in their row ✓. Inactive workflows have this icon in their row ○.

3. Click
   - ○ to make the workflow active.
   - ✓ to make the workflow inactive.

### Delete A Workflow

You can delete your workflows.

To delete a workflow:

1. Go to **Automation > Workflows**.
2. Click the delete icon  in the row associated with the workflow you want to delete.

### Automated Message Rules

While you can use automated message rules (AMR) to automatically manage email campaigns, we recommend using workflows.

AMRs are a set of criteria you define that can be used to automatically send email. With automated message rules, you gain the power and flexibility to deliver emails to your contacts when it makes the most sense. This allows you to focus your energy on compelling message design and campaign strategies.

**Note:** AMRs are a legacy feature that existed before workflows, so we recommend using workflows instead of AMRs whenever possible.

There are four different types of automated message rules: Activity-Based, Date-Based, Schedule Recurring, and API Triggered.

**Related Topics**

Video: Create Basic AMR

### Types of AMRs

There are four types of automated message rules.

**Note:** We recommend using workflows instead of Activity-Based or API Triggered AMRs.

#### Activity-Based AMRs

Activity-Based automated message rules send messages when a contact performs an activity in response to a related message that you sent to them. Possible activities include opening a message, clicking a link inside a message, or a purchase conversion. Various combinations of these activities can also be used as the criteria for describing when to send. Messages of this type are often called remails or remarketing.

**Warning:** Activity-Based Automated Message rules will only send messages to contacts who meet the criteria for the rule, after the rule is activated. For example, if you send a message on a Monday, and on the following Thursday activate an automated message rule to send based off of clicks that message generates,
the automated message rule would not send for clicks the message generated before the time the automated message rule was activated. In other words, the automated message rule would have no knowledge of clicks generated before it was activated. In this case, before Thursday.

For information about setting up an Activity-Based AMR see Create An Activity-Based AMR on page 421.

**Date-Based AMRs**

Date-Based automated message rules send messages when a chosen field for a contact matches a specified date or month. For example, you might store a contact's birthday or subscription renewal date in a field, and then chose to send a message when there is a match for that field.

**Warning:** Date-Based rules will send messages to contacts who have meet the criteria for the rule even before the rule is activated. For example, let's say you create and activate a Date-Based automated message rule on October 1, 2009 with a field of *Contact Created* and a type of match of *Check day, month, and year every day*. If a contact has a value of September 29, 2008 in their *Contact Created* field, then this automated message rule will send them the message tied to the rule.

For information about setting up a Date-Based AMR see Create A Date-Based AMR on page 423.

**Schedule Recurring AMRs**

Schedule Recurring automated message rules send messages on a periodic basis. For example, you might send out a coupon at the beginning of every month to contacts on a specific segment, such as "high value" or "at risk" customers.

For information about setting up a Schedule Recurring AMR see Create A Schedule Recurring AMR on page 425.

**API Triggered AMRs**

API Triggered automated message rules send messages when a rule is called via the API. This type of message allows for easy management and reporting for emails sent by an in-house or third party system which has been integrated with the application. For Version 4 of the API, you can use the *id* assigned to a given automated message rule to reference it. To obtain an *id* for a given Automate Message Rule, call the `readMessageRules` function.

For information about setting up an API Triggered AMR see Create An API Triggered AMR on page 428.

**Automated Message Rules Best Practices**

This topic covers some best practices for successfully using automated message rules.

With automated message rules, you gain both power and flexibility over your email campaigns. However, you will need to exercise restraint when first exploring this new feature. It is possible to set up automated message rules that automatically send email to thousands of contacts without any intervention.

**Initial Setup**

We suggest that you begin by setting up your automated message rules to send to a limited test list. This will allow you to verify that the behavior of the automated message rule matches your intentions.

To configure an automated message rule to send to a limited test list:

1. Create a list of test accounts, such as your work email address and several personal accounts at free providers like Yahoo! and Gmail.
2. Select the list you just created within in the eligible section of the Advanced page of the Automated Message Rules Wizard.
3. Activate the automated message rule.
4. Examine the results to make sure that the automated message rule performed according to the parameters you specified.

The instructions above provide a high level overview for configuring an automated message rule to send to a test list. If you need step-by-step instructions, see Create Automated Message Rules Step 1. Just remember to choose the test list that you created as the recipient for the messages sent via the automated message rule.
Avoiding Contact Fatigue

With the ability to send email automatically provided by automated message rules, you may be tempted to send quite a bit more email to contacts than you do at present. However, you need to be very cautious not to induce contact fatigue. Contact fatigue is characterized by your contacts feeling that they are receiving too many emails from you. Even if your list is entirely subscription based (aka opt-in), sending too many emails can annoy your customers and ruin the effectiveness of your e-mail marketing campaign.

Thankfully, contact fatigue is an affliction that can be avoided by taking the following preventative measures:

• Send relevant and timely messages using segmentation and extra fields.
  
  For more information on segmentation, see Segment Builder on page 435. For more information on fields, see Contact Fields on page 558.
  
• Engage your contacts and gather feedback from them to determine the right amount of email to send them.
  
• Always consider automated message rules as part of your broader email marketing campaign.

Create An Activity-Based AMR

Activity-Based automated message rules send messages when a contact performs an activity in response to a related message that you sent to them.

Possible activities include opening a message, clicking a link inside a message, or a purchase conversion. Various combinations of these activities can also be used as the criteria for describing when to send. Messages of this type are often called remails or remarketing. The type settings for a Activity-Based message type define the action or behavior that must occur for the automated message to be sent.

⚠️ Warning: Activity-Based Automated Message rules will only send messages to contacts who meet the criteria for the rule, after the rule is activated. For example, if you send a message on a Monday, and on the following Thursday activate an automated message rule to send based off of clicks that message generates, the automated message rule would not send for clicks the message generated before the time the automated message rule was activated. In other words, the automated message rule would have no knowledge of clicks generated before it was activated. In this case, before Thursday.

To define the type settings for a Activity-Based automated message type:

1. Go to Automation > Automated Message Rules.
2. Click Create New Automate Message Rule.
3. Enter a name for the rule in the Name: box.
4. Select Activity-Based from the Select a type list.
5. Select a message to use with the rule:
   a) Click Pick Message.
   b) From the window that appears, search for the message you want to use.
   c) Click on the name of the message you want to use.
   d) Click Select.
6. Select the action that the automated message rule will look for in the related message using the Mail Contacts who: pull-down menu.

You can choose to send the related message to contacts who:

• Are sent this message
• Open this message
• Open, but do not click any links
• Do not open
• Click a link
• Click a link, but do not convert
• Do not click any links
• Convert
• Do not convert
7. Click **Next Step**.

8. Specify the **Sender Options**:

   - **From Name** - The from name, also called an alias, is the name that appears to the recipient of the message.
     
     The **From Name, From Email Address**, and **Reply-To Address** text boxes support the use of field tags, special tags, and content tags. For more information on these tags see either **Message Tags** on page 149 or **Content Tags** on page 140.

   - **From Address** - The from address is the email address that your message will appear from.

   - **Reply Address** - The reply address is the address that the application will forward email replies to.

     **Note:** Reply Tracking also requires that the domain in the From line be the same as the domain of the originating email server. We also automatically add Sender Authentication when Reply Tracking is enabled. Because the application is sending your message, your From address changes to an address from our domain. Your site name is also included in the From address. You may change the email address where we will forward all email replies to.

   - **Enable Sender Authentication** - Checking the Enable Sender Authentication box will sign your message with DomainKeys/DKIM (an authentication method that can optimize your message delivery to Hotmail, MSN, and Yahoo! email addresses).

   - **Enable Reply Tracking** - Enabling Reply Tracking will store a copy of all email replies to your email messages on the Email Replies page. You may find this option convenient if you need someone other than the email address in the From line to read email replies, or if you simply want us the application to store email replies.

     **Tip:** For more information on email replies in the application, see **Email Replies** on page 317.

     **Warning:** Bad From Email addresses will be treated as a soft-bounces and you will still be charged for an email. It is up to you to make sure that if you are using special tags, field tags, or content tags in the from address, that they are replaced with valid email addresses. For more information on bounces, see **Email Bounce** on page 196.

9. Pick the message that will be sent via the automated message rule.

   a) Click **Pick Message**.

   b) From the window that appears, search for the message you want to use.

   c) Click on the name of the message you want to use.

   d) Click **Select**.

10. Set the **Timing Options**:

   a) Select the time of day you want the email to be sent from the **Send email at** list.

   b) Specify how many days you want there to be between the message being sent and the occurrence of the action you chose in step 6.

      If you want to send the automated message on the same day put zero in the day(s) text box.

   c) Click the **Send on next weekday if this falls on a weekend** checkbox if you want the email to be sent on a weekday.

11. Click

    - **Optional:** **Advanced** to set an expiration, delivery rate, and additional contact filtering options.

    - **Verify Settings** to review your automated message rule.

    If you click **Verify Settings**, skip to the last step.

12. If you clicked **Advanced**: Set the **Expiration** options.

    - Click **Continues forever** if you want the AMR to continue indefinitely.

    - If you want the AMR to end, click **Deactivate after**, enter a number in the box, and select **days, weeks, months, or years**.

      The days begin counting when an automated message rule is activated, and are reset to 0 if the rule is deactivated and then reactivated. An automated message rule can also be manually deactivated at any time from the overview page for an individual automated message rule.
13. If you clicked Advanced: Select a Delivery Rate from the Send Message list.

Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. Spreading your delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender rating than the same 20 complaints received over 15 minutes.

14. If you clicked Advanced: Set the Additional Contact Filtering criteria.

- To make members of a list or segment exempt from receiving emails from an automated message rule, click the Ineligible Recipients tab. Then click either Lists or Segments tab and select the list or segment you want to be exempt.
- To limit to automated message rule to only contacts on a specified list or segment, click Eligible Recipients tab. Then click Only contacts on Lists or Segments selected below are eligible to receive messages from this automated message rule, click either the Lists or Segments tab, and select the list or segment you want to limit the rule to.

15. Click Verify Settings.

16. Review the options you have set for your AMR and click

- Go Back to return any of the previous steps.
- Save As Draft to save but not activate the AMR.

You can always activate your AMR from the main Automated Message Rule page. For more information see Activate Or Deactivate AMRs on page 433.

- Save Activate to save all of the options you have selected and activate the automated message rule.

Activating your automated message rule means that it will immediately begin sending messages based on the options you choose in the automated message rule wizard. When you deactivate an automated message rule, messages will no longer be sent using that automated message rule. Deactivating an automated message rule does not delete the automated message rule, allowing you to reactivate the automated message rule later on. If you want to delete an automated message rule, click Delete This Automated Message Rule.

Create A Date-Based AMR

Date-based automated message rules send messages when a chosen field for a contact matches a specified date or month.

For example, you might store a contact's birthday or subscription renewal date in a field, and then chose to send a message when there is a match for that field. The type settings for the Date-Based message type define the date specifications that must be met for the automated message rule to send a message.

**Warning:** Date-Based rules will send messages to contacts who have meet the criteria for the rule even before the rule is activated. For example, let's say you create and activate a Date-Based automated message rule on October 1, 2009 with a field of Contact Created and a type of match of Check day, month, and year every day. If a contact has a value of September 29, 2008 in their Contact Created field, then this automated message rule will send them the message tied to the rule.

To define the type settings for a Date-Based automated message type:

1. Go to Automation > Automated Message Rules.
2. Click Create New Automate Message Rule.
3. Enter a name for the rule in the Name: box.
4. Select Date-Based from the Select a type list.
5. Select a field from the Field list.

When you create a field, you must specify a type for that field. Only those that have been given a type of "Date" will be shown. For more information on creating fields, see Create Custom Contact Fields on page 562.

6. Select a criteria from the Type of match list.
Make sure you thoroughly think through the type of match you choose. If you wanted to send an automated birthday message to contacts born on July 4, you would choose **Check day and month everyday**, rather than **Check day, month, and year everyday**. The reason for this is that you want to send a birthday message to everyone born on July 4, not everyone born on July 4 of a specific year.

7. Click **Next Step**.

8. Specify the **Sender Options**:

   - **From Name** - The from name, also called an alias, is the name that appears to the recipient of the message.

     The **From Name**, **From Email Address**, and **Reply-To Address** text boxes support the use of field tags, special tags, and content tags. For more information on these tags see either **Message Tags** on page 149 or **Content Tags** on page 140.

   - **From Address** - The from address is the email address that your message will appear from.

   - **Reply Address** - The reply address is the address that the application will forward email replies to.

     Note: Reply Tracking also requires that the domain in the From line be the same as the domain of the originating email server. We also automatically add Sender Authentication when Reply Tracking is enabled. Because the application is sending your message, your From address changes to an address from our domain. Your site name is also included in the From address. You may change the email address where we will forward all email replies to.

   - **Enable Sender Authentication** - Checking the Enable Sender Authentication box will sign your message with DomainKeys/DKIM (an authentication method that can optimize your message delivery to Hotmail, MSN, and Yahoo! email addresses).

   - **Enable Reply Tracking** - Enabling Reply Tracking will store a copy of all email replies to your email messages on the Email Replies page. You may find this option convenient if you need someone other than the email address in the From line to read email replies, or if you simply want us the application to store email replies.

     Tip: For more information on email replies in the application, see **Email Replies** on page 317.

     Warning: Bad From Email addresses will be treated as a soft-bounces and you will still be charged for an email. It is up to you to make sure that if you are using special tags, field tags, or content tags in the from address, that they are replaced with valid email addresses. For more information on bounces, see **Email Bounce** on page 196.

9. Pick the message that will be sent via the automated message rule.

   a) Click **Pick Message**.

   b) From the window that appears, search for the message you want to use.

   c) Click on the name of the message you want to use.

   d) Click **Select**.

10. Set the **Timing Options**:

   a) Select the time of day you want the email to be sent from the **Send email at** list.

   b) Specify how many days you want there to be between the message being sent and the occurrence of the action you chose in step 6.

     If you want to send the automated message on the same day put zero in the day(s) text box.

   c) Click the **Send on next weekday if this falls on a weekend** checkbox if you want the email to be sent on a weekday.

11. Click

   - **Optional: Advanced** to set an expiration, delivery rate, and additional contact filtering options.

   - **Verify Settings** to review your automated message rule.

     If you click **Verify Settings**, skip to the last step.

12. If you clicked **Advanced**: Set the **Expiration** options.

   - Click **Continues forever** if you want the AMR to continue indefinitely.
• If you want the AMR to end, click **Deactivate after**, enter a number in the box, and select **days, weeks, months, or years**.

The days begin counting when an automated message rule is activated, and are reset to 0 if the rule is deactivated and then reactivated. An automated message rule can also be manually deactivated at any time from the overview page for an individual automated message rule.

13. If you clicked **Advanced**: Select a **Delivery Rate** from the **Send Message** list.

Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. Spreading your delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender rating than the same 20 complaints received over 15 minutes.

14. If you clicked **Advanced**: Set the **Additional Contact Filtering** criteria.

• To make members of a list or segment exempt from receiving emails from an automated message rule, click the **Ineligible Recipients** tab. Then click either the **Lists** or **Segments** tab and select the list or segment you want to be exempt.

• To limit to automated message rule to only contacts on a specified list or segment, click **Eligible Recipients** tab. Then click **Only contacts on Lists or Segments selected below are eligible to receive messages from this automated message rule**, click either the **Lists** or **Segments** tab, and select the list or segment you want to limit the rule to.

15. Click **Verify Settings**.

16. Review the options you have set for your AMR and click

• **Go Back** to return any of the previous steps.

• **Save As Draft** to save but not activate the AMR.

You can always activate your AMR from the main Automated Message Rule page. For more information see **Activate Or Deactivate AMRs** on page 433.

• **Save Activate** to save all of the options you have selected and activate the automated message rule.

Activating your automated message rule means that it will immediately begin sending messages based on the options you choose in the automated message rule wizard. When you deaktivate an automated message rule, messages will no longer be sent using that automated message rule. Deactivating an automated message rule does not delete the automated message rule, allowing you to reactivate the automated message rule later on. If you want to delete an automated message rule, click **Delete This Automated Message Rule**.

### Create A Schedule Recurring AMR

Schedule recurring automated message rules send messages on a periodic basis.

For example, you might send out a coupon at the beginning of every month to contacts on a specific segment, such as "high value" or "at risk" customers. The type settings for the Schedule Recurring automated message define the schedule specification that must be met for the automated message rule to send a message.

To create a Schedule Recurring AMR:

1. Go to **Automation > Automated Message Rules**.
2. Click **Create New Automate Message Rule**.
3. Enter a name for the rule in the **Name** box.
4. Select **Scheduled Recurring** from the **Select a type** list.
5. Select how often the message repeats from the **Message Repeats** list:

   • **Hourly** - The automated message rule will send a message each hour. You can specify a time of day on the next page.

   • **Daily** - The automated message rule will send a message daily. You can specify a specific time of day on the next page.
• **Every weekday** - The automated message rule will only send a message on the weekdays. You can specify a specific time of day on the next page.

• **On selected days** - Here, you can use the checkboxes to select specific days to have the automated message rule send a message. You can specify a specific time of day on the next page.

• **Weekly** - With the weekly option, you can specify a specific week that the automated message rule will send a message. You can specify a specific time of day on the next page.

• **Monthly** - With the monthly option, you can specify a specific day of the month that the automated message rule will send a message. You can specify a specific time of day on the next page.

6. Pick the List(s) and/or Segment(s) that will receive the message sent by the automated message rule:
   a) Use the **Lists** and **Segments** tabs to toggle between viewing all of your segments and all of your lists.

   Though changes to list membership are made in real-time, the number that indicates the number of active contacts on a list is updated nightly. Therefore, the numbers shown here might not reflect recent changes to list membership. However, any contacts added to or removed from the list will still be sent (or not sent) the message based on their list membership as appropriate.

   b) Click the checkbox next to the list or segment that you want this automated message to send to.

   You can also use the search box to search all of your lists or segments.

7. Click **Next Step**.

8. Specify the **Sender Options**:
   a) **From Name** - The from name, also called an alias, is the name that appears to the recipient of the message.

   The **From Name**, **From Email Address**, and **Reply-To Address** text boxes support the use of field tags, special tags, and content tags. For more information on these tags see either **Message Tags** on page 149 or **Content Tags** on page 140.

   b) **From Address** - The from address is the email address that your message will appear from.

   c) **Reply Address** - The reply address is the address that the application will forward email replies to.

   **Note:** Reply Tracking also requires that the domain in the From line be the same as the domain of the originating email server. We also automatically add Sender Authentication when Reply Tracking is enabled. Because the application is sending your message, your From address changes to an address from our domain. Your site name is also included in the From address. You may change the email address where we will forward all email replies to.

   d) **Enable Sender Authentication** - Checking the Enable Sender Authentication box will sign your message with DomainKeys/DKIM (an authentication method that can optimize your message delivery to Hotmail, MSN, and Yahoo! email addresses).

   e) **Enable Reply Tracking** - Enabling Reply Tracking will store a copy of all email replies to your email messages on the Email Replies page. You may find this option convenient if you need someone other than the email address in the From line to read email replies, or if you simply want us the application to store email replies.

   **Tip:** For more information on email replies in the application, see **Email Replies** on page 317.

   **Warning:** Bad From Email addresses will be treated as a soft-bounces and you will still be charged for an email. It is up to you to make sure that if you are using special tags, field tags, or content tags in the from address, that they are replaced with valid email addresses. For more information on bounces, see **Email Bounce** on page 196.

9. Pick the message that will be sent via the automated message rule:
   a) Click **Pick Message**.

   b) From the window that appears, search for the message you want to use.

   c) Click on the name of the message you want to use.

   d) Click **Select**.

10. Set the **Timing Options**:
    a) Select the time of day you want the email to be sent from the **Send email at** list.
b) Specify how many days you want there to be between the message being sent and the occurrence of the action you chose in step 6.

If you want to send the automated message on the same day put zero in the day(s) text box.

c) Click the **Send on next weekday if this falls on a weekend** checkbox if you want the email to be sent on a weekday.

11. Click
   
   - **Optional:** **Advanced** to set an expiration, delivery rate, and additional contact filtering options.
   
   - **Verify Settings** to review your automated message rule.

   If you click **Verify Settings**, skip to the last step.

12. If you clicked **Advanced**: Set the **Expiration** options.

   - Click **Continues forever** if you want the AMR to continue indefinitely.
   
   - If you want the AMR to end, click **Deactivate after**, enter a number in the box, and select **days, weeks, months, or years**.

   The days begin counting when an automated message rule is activated, and are reset to 0 if the rule is deactivated and then reactivated. An automated message rule can also be manually deactivated at any time from the overview page for an individual automated message rule.

13. If you clicked **Advanced**: Select a **Delivery Rate** from the **Send Message** list.

   Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. Spreading your delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender rating than the same 20 complaints received over 15 minutes.

14. If you clicked **Advanced**: Set the **Additional Contact Filtering** criteria.

   For a Schedule Recurring AMR, setting **Additional Contact Filtering** criteria will apply further filters to the options you selected in step 6. For example, if you choose to send to list A in step 6, and then you choose List B as eligible recipient on this page, then the automated message rule will only send to contacts from list A that also appear on list B. Similarly, if you choose to send to list A and list C in step 6 of the wizard, and then choose list B as an ineligible recipient on this page, then only those contacts from lists A and C, who do not appear on list B will be sent a message via the automated message rule.

   - To make members of a list or segment exempt from receiving emails from an automated message rule, click the **Ineligible Recipients** tab. Then click either **Lists** or **Segments** tab and select the list or segment you want to be exempt.
   
   - To limit to automated message rule to only contacts on a specified list or segment, click **Eligible Recipients** tab. Then click **Only contacts on Lists or Segments selected below are eligible to receive messages from this automated message rule**, click either the **Lists** or **Segments** tab, and select the list or segment you want to limit the rule to.

15. Click **Verify Settings**.

16. Review the options you have set for your AMR and click

   - **Go Back** to return any of the previous steps.
   
   - **Save As Draft** to save but not activate the AMR.

   You can always activate your AMR from the main Automated Message Rule page. For more information see **Activate Or Deactivate AMRs** on page 433.
   
   - **Save Activate** to save all of the options you have selected and activate the automated message rule.

   Activating your automated message rule means that it will immediately begin sending messages based on the options you choose in the automated message rule wizard. When you deactivate an automated message rule, messages will no longer be sent using that automated message rule. Deactivating an automated message rule does not delete the automated message rule, allowing you to reactivate the automated message rule later on. If you want to delete an automated message rule, click **Delete This Automated Message Rule**.
Create An API Triggered AMR

API Triggered automated message rules send messages when a rule is called via the API. This type of message allows for easy management and reporting for emails sent by an in-house or third party system which has been integrated with the application. You can use the id assigned to a given automated message rule to reference it. To obtain an id for a given Automate Message Rule, call the readMessageRules function.

To create an API Triggered AMR:

1. Go to Automation > Automated Message Rules.
2. Click Create New Automate Message Rule.
3. Enter a name for the rule in the Name: box.
4. Select API Triggered from the Select a type list.
5. Click Next Step.
6. Set the sending options from the API Options choices:
   - Choose Allow API to select sending options to set the sending options using the API. If you choose to have the API select the sending options, you will need to fill out the Sender Options and Automated Message Rule Content sections either manually or via the API.
   - Specify sending options to set the sending options in the Sender Options section.
7. If you selected Specify sending options enter the relevant information for the Sender Options.
   - From Name - The from name, also called an alias, is the name that appears to the recipient of the message. The From Name, From Email Address, and Reply-To Address text boxes support the use of field tags, special tags, and content tags. For more information on these tags see either Message Tags on page 149 or Content Tags on page 140.
   - From Address - The from address is the email address that your message will appear from.
   - Reply Address - The reply address is the address that the application will forward email replies to.

   Tip: For more information on email replies in the application, see Email Replies on page 317.

   Warning: Bad From Email addresses will be treated as a soft-bounces and you will still be charged for an email. It is up to you to make sure that if you are using special tags, field tags, or content tags in the from address, that they are replaced with valid email addresses. For more information on bounces, see Email Bounce on page 196.

8. Pick the message that will be sent via the automated message rule.
   a) Click Pick Message.
   b) From the window that appears, search for the message you want to use.
   c) Click on the name of the message you want to use.
   d) Click Select.
9. Click
   - Optional: Advanced to set an expiration, delivery rate, and additional contact filtering options.
• **Verify Settings** to review your automated message rule. If you click **Verify Settings**, skip to the last step.

10. If you clicked **Advanced**: Set the **Expiration** options.

• Click **Continues forever** if you want the AMR to continue indefinitely.
• If you want the AMR to end, click **Deactivate after**, enter a number in the box, and select **days, weeks, months, or years**.

The days begin counting when an automated message rule is activated, and are reset to 0 if the rule is deactivated and then reactivated. An automated message rule can also be manually deactivated at any time from the overview page for an individual automated message rule.

11. If you clicked **Advanced**: Select a **Delivery Rate** from the **Send Message** list.

Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. Spreading your delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender rating than the same 20 complaints received over 15 minutes.

12. If you clicked **Advanced**: Set the **Additional Contact Filtering** criteria.

• To make members of a list or segment exempt from receiving emails from an automated message rule, click the **Ineligible Recipients** tab. Then click either **Lists** or **Segments** tab and select the list or segment you want to be exempt.
• To limit to automated message rule to only contacts on a specified list or segment, click **Eligible Recipients** tab. Then click **Only contacts on Lists or Segments selected below are eligible to receive messages from this automated message rule**, click either the **Lists** or **Segments** tab, and select the list or segment you want to limit the rule to.

13. Click **Verify Settings**.

14. Review the options you have set for your AMR and click

• **Go Back** to return any of the previous steps.
• **Save As Draft** to save but not activate the AMR.

You can always activate your AMR from the main Automated Message Rule page. For more information see **Activate Or Deactivate AMRs** on page 433.
• **Save Activate** to save all of the options you have selected and activate the automated message rule.

Activating your automated message rule means that it will immediately begin sending messages based on the options you choose in the automated message rule wizard. When you deactivate an automated message rule, messages will no longer be sent using that automated message rule. Deactivating an automated message rule does not delete the automated message rule, allowing you to reactivate the automated message rule later on. If you want to delete an automated message rule, click **Delete This Automated Message Rule**.

**Add An AMR To A Delivery Group**

You can automated message rules to delivery groups.

To add an automated message rule to a delivery group:

1. Go to **Automation > Automated Message Rules**.
2. Click the checkbox next to the automated message rule(s) you want to add to a delivery group.
3. Click **Add To Delivery Group**.
4. To add the automated message rule(s) to

• An existing delivery group, click the **Existing Delivery Group** radio button and then choose a delivery group from the pull-down menu.
• A new delivery group, click the **New Delivery Group** radio button and then give the new delivery group a name.
5. Click Add.

**View An Individual AMR**

You can view the details of any existing automated message rule.

To view an individual automated message rule, c.

1. Go to **Automation > Automated Message Rules**.
2. Click on an automated message rule's name.

The **Individual AMR Details** page is displayed.

![Automated Message Rule: Example AMR](image)

The message "Birthday Email" will be sent at 10:00 AM EDT after a contact opens the related message "Example Message".

The page is divided into three sections.

- **Details** section explains the parameters that define when and how the automated message rule sends messages.
- **Advanced Options** section lists any of the advanced options selected for the automated message rule.
- The **Reports Section** shows how many automated messages have been sent via the automated message rule for given time periods.

3. To activate or deactivate the automated message rule, click
   - **Activate Rule** to activate the rule.
   - **Deactivate Rule** to deactivate the rule.

4. Optional: Click on a report period, for example Last 7 Days, to view an aggregate report of the automated messages that were sent.

<table>
<thead>
<tr>
<th>Aggregate Report</th>
<th>Sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td>23</td>
</tr>
<tr>
<td>Yesterday</td>
<td>20</td>
</tr>
<tr>
<td>Last 7 Days</td>
<td>140</td>
</tr>
<tr>
<td>Last 30 Days</td>
<td>239</td>
</tr>
<tr>
<td>Last 140 Days</td>
<td>259</td>
</tr>
<tr>
<td>All Emails Sent</td>
<td>250</td>
</tr>
</tbody>
</table>

**Individual AMR Parameters (Details)**
The Details section of an Individual AMR Details Page explains the parameters that define when and how the automated message rule sends messages.

The Advanced Options section lists any of the advanced options selected for the automated message rule. To activate or deactivate the automated message rule, click either **Activate Rule** or **Deactivate Rule**.

**Automated Message Rule: Example AMR**
The message "Birthday Email" will be sent at 10:00 AM EDT after a contact opens the related message "Example Message".

The rule is currently inactive. **Activate Rule**

**Details**
- **From**: Joe Example <joe@example.com>
- **Subject**: Happy Birthday %firstname%
- **Frequency Caps**: This automator will override frequency caps settings

**Advanced Options**
This Automated Message Rule will continue forever.

The list New Customer List is ineligible to receive messages from this Automated Message Rule.

**Individual AMR Report Section**
The Reports Section of an Individual AMR Details page lets you see how many automated messages have been sent via the automated message rule for given time periods.

If you click on the report periods, for example **Last 7 Days**, you will be taken to an aggregate report of the automated messages sent over the last 7 days via the automated message rule.
View An AMR Report

You can view a report for your automated message rules.

For more information about Automated Message Rule Reports, see AMR Reports on page 701.

Each tab at the top of an AMR report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.
- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.
- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.
- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (Legacy) on page 734.
- **Metrics By Day** displays an aggregate of all the metrics associated with all the days an automated message rule has been sending. For more information about Metrics By Day metrics, see AMR Metrics By Day Report Metrics on page 744.

To view a report for an automated message rule:

1. Go to **Automation > Automated Message Rules**.
2. Find the row associated with the automated message rule you want to view a report for.
3. Click the report icon in the row associated with the automated message rule you want to view a report for.
4. Click a tab at the top of the report to view the different sections of the report.
   
   For example, click **Deliverability** to view the detailed deliverability metrics. For more information about report sections, see Report Sections (Legacy Reports) on page 702.
5. To filter the report by a date range:
   a) Click the calendar icon.
   
   The calendar icon is to the right of the last report section tab.
b) Select a date filter from the list of available filters.

If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.

When you filter a report by a date range, report metrics in gray bars and graphs may vary from the metrics in report grids because these datasets are collected differently. Metrics provided in bars and graphs are based on the event date. Metrics provided in report grids, like the grid on the Clicks tab, are based on the delivery date.

c) To use a custom date range, click **Custom** and add a start and an end date in the date boxes.

d) To remove the filter, click the calendar icon and then click on **All Time**.

You can also:

- Download A Summary of Detailed Contact Report on page 821
- Add Contacts From A Report To A List on page 853
- View A Comparison Report From An AMR on page 701
- Print a report by clicking the **Print** button.

**Related Topics**

Report Sections (Legacy Reports) on page 702

Report sections are the grouping of metrics that are found on reports.

**Activate Or Deactivate AMRs**

An automated message rule can be activated or deactivated.

To activate or deactivate an automated message rule:

1. Go to **Automation > Automated Message Rules**.
2. Click on the name of the automated message rule you want to activate.
3. Click **Activate Rule** to activate the Automated Message Rule.
4. Click **Deactivate Rule** to deactivate the Automated Message Rule.
Organize Knowledge Base topics explain how to manage data in Bronto that you manage yourself.

Organization is largely focused on contact organization. Contact data is organized and stored in contact fields. Contacts themselves can be organized manually using lists or dynamically using segments. In addition to contacts, you can organize messages and/or deliveries using campaigns or delivery groups.

Segments

Segments are dynamic lists of contacts grouped together by criteria that you define.

When you build your segment, you are setting criteria to use to dynamically associate contacts. For example, you can create a segment containing contacts from Chicago that opened the previous message you sent them. Contacts automatically move on and off of segments based on whether or not they match the criteria associated with a segment.

It is important to note how the use of criteria and rules can affect a contact's segment eligibility.

• When your segment's **Match Type** is **Match All Rules** (default): A contact must meet criteria in every rule in the segment in order to qualify. However, they only need to meet one of the criteria in each rule. So, if your segment has two rules and each of the rules has three criteria, they only need to meet one of the criteria from each rule.

• When your segment's **Match Type** is **Match Any Rule**: The contact must meet all of the criteria in a rule in order to qualify for the segment. If you have multiple rules, they must meet all of the criteria in one of the rules in order to qualify for the segment. So, if your segment has two rules and each of the rules has three criteria, the contact only needs to meet all three criteria for one of the rules.

If your segment uses order data and the **Match Type** is **Match Any Rule**, a contact can only qualify for a segment when all of the criteria are met within a single order. But when your segment uses order data and the **Match Type** is **Match All Rules**, they can be added to a segment when they meet the criteria across multiple orders. This is because of how order data is analyzed. When an order must meet all of the criteria for a rule, as soon as the order does not meet a criteria the contact associated with the order is not included.

Segments are one of the most important parts of a successful email marketing campaign. They allow you to create highly targeted groups of contacts that you can send messages to and can greatly increase the relevancy of your messages and the potential for contact engagement.

⚠️ **Note:** Segments do not collect tracking or order conversion data from test deliveries.

Create Segments

Segments are built using the segment builder.

There are many different options you can choose to build the segment you want. If you need specific information about all of the options available for segments, see the Segment Builder on page 435 topics.

⚠️ **Warning:** The length of time we will keep contact-level sent, opened, clicked, and/or conversion rate metrics are subject to your account’s data retention policy at the time the segment was created. If your data retention period changes after you created a segment, the segment will still use the data retention policy that was in place at the time the segment was built. You should consider data retention when building segments using these metrics as operators for your segment. For more information on the data retention policy, see Data Retention Policy on page 1509.

To begin creating segments:

1. Go to Tables > Contacts > Segments.
2. Click Create New Segment.
3. Add Criteria to your segment.
Criteria are the details that define which contacts appear on a segment.

a) Click the button for one of the criteria categories.
b) Click on the criteria you want to define.
c) Use the menus and boxes to define your criteria.

There are several dozen types of criteria and each criteria can be defined in multiple ways. For example, you could click Contacts, select Creation Date, and define a date that is after, or before, or in between, etc. a certain length of time. Each criteria option is documented in each of the following sections:

- Contacts Segment Criteria on page 446
- Email Segment Criteria on page 464
- Commerce Segment Criteria on page 459
- Membership Segment Criteria on page 483
- Performance Segment Criteria on page 484
- GeoIP Segment Criteria on page 479
- Technology Segment Criteria on page 486
- SMS Segment Criteria on page 490

The criteria you just added is part of a rule.

4. Optional: Add additional criteria to this rule by clicking the Add Criteria button.

   By default, multiple criteria within the same rule are treated as OR statements. This means that a contact only has to meet one of the criteria defined within the same rule.

5. Optional: To add a new rule to the segment, click Add Rule.

   Rules are used to group together individual criterion. By default, when a segment has multiple rules they are treated as AND statements. This means that a contact must match as least one of the criteria in each rule in order to be added to the segment.

   If you chose to add a rule, define the criteria for that rule:

   a) Click the button for one of the criteria categories.
   b) Click on the criteria you want to define.
   c) Use the menus and boxes to define your criteria.

6. Optional: To see how many contacts match the segment's criteria, click the Calculate button.

7. Continue to add rules and/or criteria until you are happy with your segment, then click Save Changes or Save & Close.

Related Topics
- Video: Create Segments

Segment Builder

These help topics describe how to use the segment builder.

To get to the segment builder, go to Tables > Contacts > Segments and click Create New Segment. To create a new segment, go to Tables > Contacts > Segments and click on the pencil icon in the row associated with an existing segment you want to edit.

Create And Edit A Segment's Name And Description

A segment's name allows you to uniquely identify a segment. The description allows you to describe the purpose of the segment.
To create or edit a segment's name and description:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click on the name or description of the segment.
   A text box for the name and description will appear, along with a Done button.
4. Enter a name for the segment in the first text box.
5. Enter a description for the segment in the second text box.
6. Click Done.

**Calculate The Contact Count For A Segment**

Calculating the contact count for a segment allows you to see how many contacts are currently on a segment. It's possible that calculating the contact count may take some time depending on what other requests Bronto is currently processing. If you click the Calculate Contact Count before the count is updated, you are not refreshing the current request. Instead, you are making a new request to update the segment and this might make the count take even longer.

*Note:* Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

To calculate the contact count for a segment:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Calculate Contact Count.

*Note:* If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).
For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

**Calculate The Contact Count For A Rule**

Calculating the contact count for a rule allows you to see how many contacts a given rule describes.

To calculate the contact count for a rule:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Calculate**.

**Note:**

If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

**Calculate The Contact Count For A Criterion**

Calculating the contact count for a criterion allows you to see how many contacts a given criterion describes.

To calculate the contact count for a criterion:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Calculate**.
Note:

If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

**Change The AND/OR Operators Used In A Segment**

Rules and criteria in a segment are separated by **AND** and **OR** operators.

The operator used affects who the segment describes. For example:

- All contacts who opened my newsletter **AND** who have placed an order in the last 30 days.
- All contacts who opened my newsletter **OR** who have placed an order in the last 30 days.

By default, criteria are separated by the **OR** operator and rules are separated by the **AND** operator. This means that a contact would only have to meet one of the criteria in a rule but would have to match each of the rules to be added to a segment. However, there may be times when you want to make sure a contact matches multiple criteria instead of multiple rules. For example, if you want to build a segments of contacts who purchased a particular item in the last two weeks, you cannot use two rules. Instead, you will need to build a single rule with two criteria that use the **AND** operator for the criteria. Why?

If you use two rules:

- Rule 1: ordered this hat
- Rule 2: placed an order in the last 2 weeks

Any contact who has ever ordered the hat (regardless of when) and also placed the order in the last two weeks are added to the segment. The item they ordered in the last two weeks does not have to be the hat. This is because Bronto evaluates each rule independently and adds contacts who match both rules to the segment.

If you set two criteria within a rule and set the segment's **Match Type** to **Match Any Rule**, then the criteria will be considered together. (The contact must have bought the hat in the last two weeks to be added to the segment.) But remember, any other rules you add to this type of segment are now evaluated using the **OR** operator.
To change the AND/OR operators used in a segment:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Advanced**.

4. Select the match type from the **Match Type** pull down menu. You can select:
   - **Match All Rules** - This option separates rules with **AND** and criteria with **OR**.
   - **Match Any Rule** - This option separates rules with **OR** and criteria with **AND**.

5. Click **Apply Changes**.

**Filter A Segment By Active And Inactive Contacts**

Changing the type of contacts shown on a segment allows you to filter the segment and only show Active or Inactive contacts. By default, a segment shows both Active and Inactive contacts.

Active contacts are "live" contacts that can receive marketing emails from you. Inactive contacts cannot receive marketing emails from you. Contacts are designated as active or inactive based on their status.

To change the type of contact shown on a segment:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Advanced**.
4. Select the type of contact you want displayed on the segment from the Show pull-down menu. You can select:
   • All Contacts (Default)
   • Only Active Contacts
   • Only Inactive Contacts

5. Click Apply Changes.

Add Rules To A Segment

Rules are used to group together individual criterion which define the rule.

It is important to note how the use of criteria and rules can affect a contact's segment eligibility.

• When your segment's Match Type is Match All Rules (default): A contact must meet criteria in every rule in the segment in order to qualify. However, they only need to meet one of the criteria in each rule. So, if your segment has two rules and each of the rules has three criteria, they only need to meet one of the criteria from each rule.

• When your segment's Match Type is Match Any Rule: The contact must meet all of the criteria in a rule in order to qualify for the segment. If you have multiple rules, they must meet all of the criteria in one of the rules in order to qualify for the segment. So, if your segment has two rules and each of the rules has three criteria, the contact only needs to meet all three criteria for one of the rules.

If your segment uses order data and the Match Type is Match Any Rule, a contact can only qualify for a segment when all of the criteria are met within a single order. But when your segment uses order data and the Match Type is Match All Rules, they can be added to a segment when they meet the criteria across multiple orders. This is because of how order data is analyzed. When an order must meet all of the criteria for a rule, as soon as the order does not meet a criteria the contact associated with the order is not included.

To add a rule to a segment:
1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.

Add Or Edit A Description For A Rule In A Segment

You can add a description for a rule to help summarize what the rule is trying to accomplish. Rule descriptions can help describe complex rules to other users who may be viewing the segment.
Note: When a rule is collapsed, the contact count and description will remain visible.

To add/edit the description for a rule:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Move your mouse over the area directly next to a rule's contact count. You will see a pencil icon appear.

4. Click the pencil icon.
5. Add a description for the rule in the text box.
6. Click Done.

Copy A Rule In A Segment

Copying a rule allows you to make an exact copy of an existing rule.

To copy a rule:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Copy.

Remove A Rule In A Segment

To remove a rule:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Remove.
Expand Or Collapse Rules In The Segment Builder

Expanding and collapsing rules and criteria is a convenient way to minimize parts of the segment builder you're not currently working on, providing additional space for the parts of the segment you are focusing on. You can expand and collapse individual criteria, rules, or expand and collapse all rules.

To expand and collapse rules:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click the
   - **Collapse/Expand** button to collapse/expand a single rule.
   - **Expand All** to expand all rules.
   - **Collapse All** to collapse all rules.

   **Note:** When a rule is collapsed, the contact count and description will remain visible.

   **Note:** When all the rules are collapsed, the description and contact count for each rule will remain visible.
Add Criteria To A Segment

Criteria contain the details that define which contacts appear on a segment. Criteria are contained within rules. When you add a criterion, it gets added to a rule. A rule can contain one or many criteria. Each criterion contains different options that allow you to define who will appear on a segment.

It is important to note how the use of criteria and rules can affect a contact's segment eligibility.

- When your segment's **Match Type** is **Match All Rules** (default): A contact must meet criteria in every rule in the segment in order to qualify. However, they only need to meet one of the criteria in each rule. So, if your segment has two rules and each of the rules has three criteria, they only need to meet one of the criteria from each rule.

- When your segment's **Match Type** is **Match Any Rule**: The contact must meet all of the criteria in a rule in order to qualify for the segment. If you have multiple rules, they must meet the all of the criteria in one of the rules in order to qualify for the segment. So, if your segment has two rules and each of the rules has three criteria, the contact only needs to meet all three criteria for one of the rules.

If your segment uses order data and the **Match Type** is **Match Any Rule**, a contact can only qualify for a segment when all of the criteria are met within a single order. But when your segment uses order data and the **Match Type** is **Match All Rules**, they can be added to a segment when they meet the criteria across multiple orders. This is because of how order data is analyzed. When an order must meet all of the criteria for a rule, as soon as the order does not meet a criteria the contact associated with the order is not included.

To add a criterion to a rule:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Criteria** in a rule.
   Criteria must be added to a rule. A rule can contain one or many criteria. For more information on adding rules, see **Add Rules To A Segment** on page 440.

4. Select a category.

5. Select a criterion.
If you move your mouse over a criterion's name, a description will appear that describes what the criterion allows you to accomplish.

The criterion is added to the rule. Each criterion contains its own unique options that define who will appear on the segment.

**Copy A Criterion In A Segment**

Copying a criterion allows you to make an exact copy of an existing criterion.

To copy a criterion:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 🖋️ in the row associated with the segment you want to edit.
3. Click **Copy**.

**Remove A Criterion In A Segment**

To remove a criterion:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 🖋️ in the row associated with the segment you want to edit.
3. Click **Remove**.
Expand Or Collapse Criteria In The Segment Builder

Expanding and collapsing rules and criteria is a convenient way to minimize parts of the segment builder you're not currently working on, providing additional space for the parts of the segment you are focusing on. You can expand and collapse individual criteria, rules, or expand and collapse all rules.

To expand and collapse a criterion:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click the Collapse/Expand button to collapse or expand a criterion.

When a criterion is collapsed, the description for the criterion remains visible.

Hide The Application Navigation When Using The Segment Builder

If you are building a segment consisting of multiple rules and criteria, you can hide the application navigation to increase the size of the segment builder canvas.

To hide the application navigation when using the segment builder:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Hide Navigation to hide the application navigation.
4. Click Show Navigation to show the application navigation.
Save A Segment

Once a segment is saved, you'll be able schedule deliveries to that segment. For information on scheduling deliveries to segments, see Select Email Recipients on page 281.

To save a segment:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click
   - Save to save the segment and continue editing.
   - Click Save and Close to save the segment and close the segment builder.

Related Topics
Select Email Recipients on page 281
In the Select Recipients section, you will choose who will receive the email message.

Contacts Segment Criteria

Creating segments based on contact data allows you to create segments based on data stored in fields, performance metrics, email address, and more. Below you will find an explanation of the different types of segments you can create based on contact data.

Create A Segment Based On Contacts Who Have Bounced Messages

The Bounced Contacts criterion allows you to create segments based on contacts who have had a specified number of bounced emails without activity.

To create a segment based for bounced contacts:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click Contacts.
5. Click Bounced Contacts.
6. In the first pull-down menu, select:
   - Exactly to target an exact number of bounces.
   - Greater Than to target all contacts who have more bounced messages than the number specified.
• **Greater Than Or Equal To** to target all contacts who have the number of bounced messages specified or more than this number.
• **Less Than** to target fewer bounced messages than specified.
• **Less Than Or Equal To** to target the number of bounced messages specified and contacts who have less than this number.

7. Enter the bounce number in the box.
   You cannot specify a number larger than 10.

8. Click the plus button.
9. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On How Contacts Were Added To Your Account**

The **Contact Source** criterion allows you to create segments based on how contacts were added to your account (sign up, import, API, etc).

To create a segment based on how contacts were added to your account:

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon 🖋 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Contacts**.
5. Click **Contact Source**.
6. In the first pull-down menu, select one of the following:
   • Is
   • Is Not
7. In the second pull-down menu, select one of the following:
   • Manually Added
   • From A Bulk Contact Import
   • From An API Session
   • From a Web Page Signup
   • From a Salesforce Report
8. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On Contact Status**

The **Contact Status** criterion allows you to create segments based on contact status

To create a segment based on contact status:

Tip: For more information contact status, see **Contact Status** on page 1083.

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon 🖋 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Contacts**.
5. Click **Contact Status**.
6. In the first pull-down menu, select one of the following:
   - Is
   - Is Not

7. In the second pull-down menu, select one of the following:
   - **Active** - Contacts with a status of Active are contacts that can receive emails from you.
   - **Bounced** - Contacts with a status of Bounce cannot be sent emails because they have hard bounced due to a bad email address, or they have exceeded the bounce limit set for your account.
   - **Onboarding** - Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.
   - **Transactional** - Contacts with a status of Transactional can only be sent transactional emails. A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.
   - **Unconfirmed** - Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you in order for you to send to them.
   - **Unsubscribed** - Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.

8. Click **Add Criteria** if you want to add another criteria.

**Related Topics**

- **Contact Status** on page 1083

Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

**Create A Segment Based On When A Contact Was Created**

The **Created Date** criterion allows you to create a segment based on when contacts were created (or added) in your account.

To create a segment based on how when were added to your account:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 📊 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **Contacts**.
5. Click **Created Date**.
6. In the first pull-down menu, select one of the following:
   - Is The Same Day As
• Is Not The Same Day As
• Is Between
• Is Not Between
• Is Within The Last
• Is Not Within The Last
• Is Within The Next
• Is Not Within The Next
• Is Before
• Is Before Or The Same Day As
• Is After
• Is After Or The Same Day As
• Is In Time Frame
• Is Not In Time Frame
• Is The Same Month As
• Is Not The Same Month As
• Is The Same Year As
• Is Not The Same Year As

7. If you selected

• Is The Same Day As, Is Not The Same Day As, Is Before, Is Before Or The Same Day As, Is After, or Is After Or The Same Day As in the previous step, enter a date in the text box using the date picker.

• Is Between or Is Not Between in the previous step, enter a starting date in the first text box and an ending date in the second text box.

• Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next in the previous step, enter a numerical value in the text box.

• Is In Time Frame or Is Not In Time Frame in the previous step, select one of the following:
  • Last Month
  • Last Quarter
  • Last Week (S-S)
  • Last Week (M-F)
  • Last Year
  • Next Month
  • Next Quarter
  • Next Week (S-S)
  • Next Week (M-F)
  • Next Year
  • This Month
  • This Quarter
  • This Week (S-S)
  • This Week (M-F)
  • This Year
  • Today
  • Tomorrow
  • Yesterday

• Is The Same Month As or Is Not The Same Month As in the previous step, select one of the following:
  • January
  • February
  • March
  • April
  • May
• June
• July
• August
• September
• October
• November
• December

• **Is The Same Year As** or **Is Not The Same Year As** in the previous step, enter a numerical value in the text box corresponding to a year (e.g. 1987).

8. If you selected **Is Within The Last**, **Is Not Within The Last**, **Is Within The Next**, or **Is Not Within The Next**, select one of the following from the last pull-down menu:

   - Days
   - Weeks
   - Months

   **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select **Is Within The Next Month**. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select **Is Within The Last Month**. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use **contact throttling** to prevent sending these contacts excessive messages.

   • Years

9. Optional: Click the **Ignore Year** checkbox if you want the segment to ignore the year as it evaluates the date for matches.

10. Click **Add Criteria** if you want to add another criteria.

**Related Topics**

**Edit The Contact Throttling Settings In A Workflow** on page 353

The contact throttling settings in a workflow allow you to adjust how many times a contact can enter a workflow.

**Create A Segment Based On The Text Contained In An Email Address**

The **Email Address** criterion allows you to create segments based on the text contained in email addresses stored in your account. This type of segment can be useful for creating segments of contacts belonging to a particular ISP (for example all email addresses containing the text **gmail**).

To create a segment based on contact email addresses:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon [ ] in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **Contacts**.
5. Click **Email Address**.
6. From the first pull-down menu, select one of the following:
   - Starts With
   - Does Not Start With
• Ends With
• Does Not End With
• Contains
• Does Not Contain
• Is
• Is Not
• Is Empty
• Is Not Empty

7. In the text box, add some text corresponding to the email address you want to segment on. For example, Contains gmail.

  Tip: Click Add to add another text value.

8. Click Add Criteria if you want to add another criteria.

Create A Segment Based On Data Stored In Fields

The Fields criterion allows you to create segments based on data stored in fields in your account.

To create a segment based on data stored in fields:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click Contacts.
5. Click Fields.
6. Click Add Field.
7. Click in the row associated with a field.

   Tip: Make note of the value in Type column. The Type set for the for the field will determine which steps to take below.

8. Click Select.
9. Based on the Type set for the field, select one of the following from the first pull-down menu:
   - If the field has a type of Text, select one of the following:
     • Starts With
     • Does Not Start With
     • Ends With
     • Does Not End With
     • Contains
     • Does Not Contain
     • Is
     • Is Not
     • Is Empty
     • Is Not Empty
   - If the field has a type of Number, select one of the following:
     • Equals
     • Is Not Equal To
     • Is Less Than
     • Is Less Than Or Equal To
• Is Greater Than
• Is Greater Than Or Equal To

• If the field has a type of **Date**, select one of the following:
  • Is The Same Day As
  • Is Not The Same Day As
  • Is Between
  • Is Not Between
  • Is Within The Last
  • Is Not Within The Last
  • Is Within The Next
  • Is Not Within The Next
  • Is Before
  • Is Before Or The Same Day As
  • Is After
  • Is After Or The Same Day AS
  • Is In Time Frame
  • Is Not In Time Frame
  • Is The Same Month As
  • Is Not The Same Month As
  • Is The Same Year As
  • Is Not The Same Year As
  • Is Empty
  • Is Not Empty

• If the field has a type of **checkbox**, select one of the following:
  • Is Checked
  • Is Unchecked

Note: At this point, you are finished.

• If the field has a type of **Pull-down Menu** or **Radio Button**, select one of the following from the first pull-down menu:
  • Is
  • Is Not
  • Is Empty
  • Is Not Empty

10. Based on the **Type** set for the field:

• If the field has a type of **Text**, enter a text value in the input.
  
  Tip: Click **Add** to add another text value.

• If the field has a type of **Number**, enter a numerical value in the input.
  
  Tip: Click **Add** to add another numerical value.

• If the field has a type of **Date**, do one of the following based on what you selected in previous step:
  • Last Month
  • Last Quarter
  • Last Week (S-S)
  • Last Week (M-F)
  • Last Year
  • Next Month
  • Next Quarter
• Next Week (S-S)
• Next Week (M-F)
• Next Year
• This Month
• This Quarter
• This Week (S-S)
• This Week (M-F)
• This Year
• Today
• Tomorrow
• Yesterday

If the field has a type of **Pulldown Menu** or **Radio Button**, select a value from the second pull-down menu. The contents of this pull-down menu will be populated with either the options you added when creating a custom field, or the default values for that predefined field type (For example, the Salutation, State (Two-Letter Abbreviation), and Country (pick from list) predefined fields)

**Tip:** Click **Add** to select additional values.

**Tip:** For more information on adding options to custom fields with a type of **Pulldown Menu** or **Radio Button**, see [Add Options To Contact Fields Menus and Buttons](#) on page 565.

11. If you selected Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next, select one of the following from the last pull-down menu:

   • Days
   • Weeks
   • Months

   **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select Is Within The Next Month. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select Is Within The Last Month. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use **contact throttling** to prevent sending these contacts excessive messages.

   • Years

12. Optional: Click the **Ignore Year** checkbox if you want the segment to ignore the year as it evaluates the date for matches.

13. Click **Add Criteria** if you want to add another criteria.

**Related Topics**

[Edit The Contact Throttling Settings In A Workflow](#) on page 353
The contact throttling settings in a workflow allow you to adjust how many times a contact can enter a workflow.

[Add Options To Contact Fields Menus and Buttons](#) on page 565

**Create A Segment Based On The Last Time A Contact's Data Was Modified**

The **Last Modified Date** criterion allows you to create segments based on the last time contact data was modified. This includes any changes to field data, email address, list membership, or contact status within the application.

To create a segment based on the last modified date for contacts:

1. Go to **Tables > Contacts > Segments**.
2. To
• Create a new segment, click **Create New Segment**.
• Edit an existing segment, click the pencil icon 🖋️ in the row associated with the segment you want to edit.

3. **Click Add Rule.**
   If you want to add this criterion to an existing rule, skip this step.

4. **Click Contacts.**

5. **Click Last Modified Date.**

6. In the first pull-down menu, select one of the following:
   • Is The Same Day As
   • Is Not The Same Day As
   • Is Between
   • Is Not Between
   • Is Within The Last
   • Is Not Within The Last
   • Is Within The Next
   • Is Not Within The Next
   • Is Before
   • Is Before Or The Same Day As
   • Is After
   • Is After Or The Same Day As
   • Is In Time Frame
   • Is Not In Time Frame
   • Is The Same Month As
   • Is Not The Same Month As
   • Is The Same Year As
   • Is Not The Same Year As

7. If you selected
   • **Is The Same Day As, Is Not The Same Day As, Is Before, Is Before Or The Same Day As, Is After, or Is After Or The Same Day As** in the previous step, enter a date in the text box using the date picker.
   • **Is Between or Is Not Between** in the previous step, enter a starting date in the first text box and an ending date in the second text box.
   • **Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next** in the previous step, enter a numerical value in the text box.
   • **Is In Time Frame or Is Not In Time Frame** in the previous step, select one of the following:
     • Last Month
     • Last Quarter
     • Last Week (S-S)
     • Last Week (M-F)
     • Last Year
     • Next Month
     • Next Quarter
     • Next Week (S-S)
     • Next Week (M-F)
     • Next Year
     • This Month
     • This Quarter
     • This Week (S-S)
     • This Week (M-F)
     • This Year
• Today
• Tomorrow
• Yesterday

• **Is The Same Month As** or **Is Not The Same Month As** in the previous step, select one of the following:
  • January
  • February
  • March
  • April
  • May
  • June
  • July
  • August
  • September
  • October
  • November
  • December

• **Is The Same Year As** or **Is Not The Same Year As** in the previous step, enter a numerical value in the text box corresponding to a year (e.g. 1987).

8. If you selected **Is Within The Last**, **Is Not Within The Last**, **Is Within The Next**, or **Is Not Within The Next**, select one of the following from the last pull-down menu:
  • Days
  • Weeks
  • Months

  **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select **Is Within The Next Month**. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select **Is Within The Last Month**. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use contact throttling to prevent sending these contacts excessive messages.

• Years

9. Optional: Click the **Ignore Year** checkbox if you want the segment to ignore the year as it evaluates the date for matches.

10. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On The Last Date A Contact Unsubscribed**

The **Last Unsubscribed Date** criterion allows you to create a segment based on the last date a contact unsubscribed from receiving marketing emails from you.

**Note:** Contacts who have unsubscribed are likely to be Inactive contacts with a status of Unsubscribed. To segment on these contacts, click Advanced and change the settings to show All Contacts or Only Inactive Contacts.

**Tip:** Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.
To create a segment based on the last date a contact unsubscribed:

1. Go to **Tables > Contacts > Segments.**
2. To
   - Create a new segment, click **Create New Segment.**
   - Edit an existing segment, click the pencil icon 📝 in the row associated with the segment you want to edit.
3. Click **Add Rule.**
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **Contacts.**
5. Click **Last Unsubscribed Date.**
6. In the first pull-down menu, select one of the following:
   - Is The Same Day As
   - Is Not The Same Day As
   - Is Between
   - Is Not Between
   - Is Within The Last
   - Is Not Within The Last
   - Is Within The Next
   - Is Not Within The Next
   - Is Before
   - Is Before Or The Same Day As
   - Is After
   - Is After Or The Same Day As
   - Is In Time Frame
   - Is Not In Time Frame
   - Is The Same Month As
   - Is Not The Same Month As
   - Is The Same Year As
   - Is Not The Same Year As
7. If you selected
   - Is The Same Day As, Is Not The Same Day As, Is Before, Is Before Or The Same Day As, Is After, or Is After Or The Same Day As in the previous step, enter a date in the text box using the date picker.
   - Is Between or Is Not Between in the previous step, enter a starting date in the first text box and an ending date in the second text box.
   - Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next in the previous step, enter a numerical value in the text box.
   - Is In Time Frame or Is Not In Time Frame in the previous step, select one of the following:
     - Last Month
     - Last Quarter
     - Last Week (S-S)
     - Last Week (M-F)
     - Last Year
     - Next Month
     - Next Quarter
     - Next Week (S-S)
     - Next Week (M-F)
     - Next Year
     - This Month
     - This Quarter
- This Week (S-S)
- This Week (M-F)
- This Year
- Today
- Tomorrow
- Yesterday

• **Is The Same Month As** or **Is Not The Same Month As** in the previous step, select one of the following:
  - January
  - February
  - March
  - April
  - May
  - June
  - July
  - August
  - September
  - October
  - November
  - December

• **Is The Same Year As** or **Is Not The Same Year As** in the previous step, enter a numerical value in the text box corresponding to a year (e.g. 1987).

8. If you selected **Is Within The Last**, **Is Not Within The Last**, **Is Within The Next**, or **Is Not Within The Next**, select one of the following from the last pull-down menu:

- Days
- Weeks
- Months

  **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select Is Within The Next Month. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select Is Within The Last Month. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use **contact throttling** to prevent sending these contacts excessive messages.

- Years

9. Optional: Click the **Ignore Year** checkbox if you want the segment to ignore the year as it evaluates the date for matches.

10. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On Contact Email Format Preferences**

The **Message Format Preference** criterion allows you to create segments based on contact email message format preferences (Text or HTML).

To create a segment based on contact email message format preference:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 🖋 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Contacts**.
5. Click **Message Format Preference**.
6. In the first pull-down menu, select one of the following:
   - Is
   - Is Not
7. In the second pull-down menu, select one of the following:
   - Text
   - HTML
8. Click **Add Criteria** if you want to add another criteria.

### Create A Segment Based On Contact Mobile Numbers

The **Mobile Number** criterion allows you to create segments based on mobile numbers stored in your account.

To create a segment based on contact mobile numbers:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Contacts**.
5. Click **Mobile Number**.
6. From the first pull-down menu, select one of the following:
   - Starts With
   - Does Not Start With
   - Ends With
   - Does Not End With
   - Contains
   - Does Not Contain
   - Is
   - Is Not
   - Is Empty
   - Is Not Empty
7. In the text box, add some text corresponding to the mobile number you want to segment on.
   For example, Starts With '555'.
   a) Click **Add** to add another text value.
8. Click **Add Criteria** if you want to add another criteria.

### Create A Segment Based On Non-Engaged Contacts

The **Non-Engaged Contacts** criterion allows you to create segments based on contacts who have not clicked on and/or opened recent emails.

To create a segment based on non-engaged contacts:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
• Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.

4. Click Contacts.
5. Click Non-Engaged Contacts.
6. In the first pull-down menu, select:
   • Clicked to create a segment based on clicks.
   • Opened to create a segment based on opens.

7. Enter the number clicks or opens in the box.
8. Click the plus button.
9. Click Add Criteria if you want to add another criteria.

Commerce Segment Criteria
Creating segments based on commerce data allows you to segment on order, conversion, revenue, and RFM data stored for your contacts.

If your segment uses order data and the Match Type is Match Any Rule, a contact can only qualify for a segment when all of the criteria are met within a single order. But when your segment uses order data and the Match Type is Match All Rules, a contact can be added to a segment when they meet the criteria across multiple orders. This is because of how order data is analyzed. When an order must meet all of the criteria for a rule, as soon as the order does not meet a criteria the contact associated with the order is not included.

þ Note: Segments do not collect tracking or order conversion data from test deliveries.

Create A Segment Based On The Total Revenue Recorded For Contacts
The Total Revenue criterion allows you to create segments based on the total revenue recorded for contacts.

Revenue can be tracked in the application using the Orders Service or via the API. For more information on using the Orders Service, see Configure Order Settings on page 1154. For information on tracking revenue in the API, see the addOrUpdateOrders documentation.

þ Note: Segments do not collect tracking or order conversion data from test deliveries.

To create a segment based on the total revenue recorded for contacts:

1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click Commerce.
5. Click Total Revenue.
6. In the first pull-down menu, select one of the following:
   • Equals
   • Is Not Equal To
   • Is Less Than
   • Is Less Than Or Equal To
   • Is Greater Than
   • Is Greater Than Or Equal To
7. Enter a numerical value in the text box.
Organize

Tip: Click Add to add multiple numerical values.

8. Click Add Criteria if you want to add another criteria.

To view the revenue recorded for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, then click on the email address of a contact. You will be taken to the Contact Details page for that contact. In the RFM Metrics section, you can view the total revenue recorded for the contact. For more information on viewing revenue data for an individual contact, see Contact Details RFM Metrics on page 917.

Create A Segment Based On Order Data Stored For Contacts

The Ordered/Converted criterion allows you to create segments based on order data associated with contacts.

Note: Segments do not collect tracking or order conversion data from test deliveries.

To create a segment based on the order data associated with contacts:

1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click Commerce.
5. Click Ordered/Converted.
6. In the first pull-down menu, select one of the following:
   • All Orders
   • Conversions
   • Orders Not Associated With A Delivery
7. Only if you selected Conversions:
   a) From the second pull-down menu, select one of the following:
      • Delivery
      • Delivery Group
   b) Based on what you selected, click either Add A Delivery or Add A Delivery Group.
   c) Based on what you selected, click in the row associated with either a delivery or delivery group.

Note: Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

Note:
If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than
100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

d) Click Select.

8. In the pull down menu after the text Where, select one of the following:
   • The Product Price
   • The Product Description
   • The Product Name
   • The Product Category
   • The Product Image
   • The Product URL
   • The Product SKU
   • The Product Quantity
   • The Order Id
   • The Order Total
   • The Order Date

9. If you selected The Product Price, The Product Quantity, or The Order Total in the previous step, select one of the following:
   • Equals
   • Is Not Equal To
   • Is Less Than
   • Is Less Than Or Equal To
   • Is Greater Than
   • Is Greater Than Or Equal To

10. If you selected The Order Date, select one of the following:
   • Is The Same Day As
   • Is Not The Same Day As
   • Is Between
   • Is Not Between
   • Is Within The Last
   • Is Not Within The Last
   • Is Within The Next
   • Is Not Within The Next
   • Is Before
   • Is Before Or The Same Day As
   • Is After
   • Is After Or The Same Day AS
   • Is In Time Frame
   • Is Not In Time Frame
   • Is The Same Month As
   • Is Not The Same Month As
   • Is The Same Year As
   • Is Not The Same Year As

11. If you selected any of the other options in the previous step, select one of the following:
   • Starts With
   • Does Not Start With
   • Ends With
   • Does Not End With
12. If you selected Equals, Is Not Equal To, Is Less Than, Is Less Than Or Equal To, Is Greater Than, or Is Greater Than Or Equal To in the previous step, enter a number in the text box.
   a) Click Add to add numerical values.

13. For Order Date only: If you selected Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next, select one of the following from the last pull-down menu:
   • Days
   • Weeks
   • Months

   Note: When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select Is Within The Next Month. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select Is Within The Last Month. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use contact throttling to prevent sending these contacts excessive messages.
   • Years

14. Optional: Click the Ignore Year checkbox if you want the segment to ignore the year as it evaluates the date for matches.

15. Click Add Criteria if you want to add another criteria.

To view the order data associated with a contact, go to Tables > Contacts > Search Contacts, search for your contacts, then click on the email address of a contact. You will be taken to the Contact Details page for that contact. Click Orders to view detailed order data associated with the contact. For more information on viewing the order data associated with an individual contact, see Contact Details Order Data on page 924.

Orders can be tracked in the application using Conversion Tracking or via the API. For more information on using Conversion Tracking, see Configure Order Settings on page 1154. For information on tracking orders in the API, see addOrUpdateOrders.

Create Segments Based On Contact RFM Metrics
The RFM Metrics criterion allows you to create segments based on RFM (Recency, Frequency, Monetary) metrics associated with contacts.

If your account does not use Order Service, any segment built using RFM metrics will be updated on a nightly basis, rather than in real-time. This is because RFM metrics are also updated nightly, so the segment will only receive updated metrics once per day.

   Note: Segments do not collect tracking or order conversion data from test deliveries.

To create a segment based on contact RFM metrics:

1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
If you want to add this criterion to an existing rule, skip this step.

4. Click Commerce.

5. Click RFM Metrics.

6. In the first pull-down menu, select one of the following:
   - Average Order Value
   - First Order Date
   - Last Order Date
   - Last Order Total
   - Total Orders
   - Total Revenue

7. If you selected
   - Average Order Value, Last Order Total, Total Orders or Total Revenue in the previous step, select one of the following:
     - Equals
     - Is Not Equal To
     - Is Less Than
     - Is Less Than Or Equal To
     - Is Greater Than
     - Is Greater Than Or Equal To
   - First Order Date or Last Order Date in the previous step, select one of the following:
     - Is The Same Day As
     - Is Not The Same Day As
     - Is Between
     - Is Not Between
     - Is Within The Last
     - Is Not Within The Last
     - Is Within The Next
     - Is Not Within The Next
     - Is Before
     - Is Before Or The Same Day As
     - Is After
     - Is After Or The Same Day AS
     - Is In Time Frame
     - Is Not In Time Frame
     - Is The Same Month As
     - Is Not The Same Month As
     - Is The Same Year As
     - Is Not The Same Year As

8. If you selected Equals, Is Not Equal To, Is Less Than, Is Less Than Or Equal To, Is Greater Than, or Is Greater Than Or Equal To in the previous step, enter a number in the text box.

   Tip: Click Add to add numerical values.

9. For Order Date only: If you selected Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next, select one of the following from the last pull-down menu:
   - Days
   - Weeks
   - Months
Note: When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select Is Within The Next Month. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select Is Within The Last Month. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use contact throttling to prevent sending these contacts excessive messages.

10. Optional: Click the Ignore Year checkbox if you want the segment to ignore the year as it evaluates the date for matches.

11. Click Add Criteria if you want to add another criteria.

Email Segment Criteria

Creating segments based on contact email metrics allows you to segment on contact level email metrics, such as open rate, click rate, conversion rate, and number of emails sent.

Create A Segment Of Contacts Who Clicked Any Link In An Email You Sent Them

The Any Link Clicks criterion allows you to create segments of contacts who clicked on any link in an email you sent them.

To create a segment of contacts who clicked on any link in an email you sent them:

1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon 📝 in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click Email.
5. Click Any Link Clicks.
6. In the first pull-down menu, select one of the following:
   • Clicked
   • Did Not Click
7. In the second pull-down menu, select one of the following:
   • Delivery
   • Delivery Group
   • Message
   • Campaign
   You will only see this option if you have enabled Campaigns.
8. Based on what you selected in the previous step, click either Add A Delivery, Add A Delivery Group, or Add Message, or Add Campaign.
9. Based on what you selected in the previous step, click in the row associated with either a delivery, delivery group, message, or campaign.

Note: Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

Note:
If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors do not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

10. Click Select.
   a) Click Add to select additional deliveries or delivery groups.

11. Click Add Criteria if you want to add another criteria.

If you select Clicked Any Link From Delivery Group X, the criterion will include contacts who clicked any link in any of the deliveries in Delivery Group X. If you select Did Not Click Any Link From Delivery Group X, the criterion will include contacts who did not click any links in deliveries in Delivery Group X.

Create A Segment Of Contacts Who Were Sent An Email That Ended Up Bouncing

The Bounced criterion allows you to create segments based on if contacts were sent an email that ended up bouncing.

To create a segment based on if a contact was sent an email that ended up bouncing:
1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click Email.
5. Click Bounced.
6. In the second pull-down menu, select one of the following:
   • Delivery
   • Delivery Group
   • Message
   • Campaign
   You will only see this option if you have enabled Campaigns.
7. Based on what you selected in the previous step, click either Add A Delivery, Add A Delivery Group, or Add Message, or Add Campaign.
8. Based on what you selected in the previous step, click in the row associated with either a delivery, delivery group, message, or campaign.

Note: Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.
Note:

If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

9. Click Select.
   a) Click Add to select additional deliveries or delivery groups.

10. Click Add Criteria if you want to add another criteria.

Create A Segment Of Contacts Based On The Bounced Date

The Bounced Date criterion allows you to create a segment based on when bounces were recorded in your account.

Create a segment with Bounced Date as the criterion will only include active contacts who have bounced. If a contact has been given a status of inactive due to a hard bounce or exceeding the bounce limit, they will not be included in this segment.

To create a segment based on when bounces were recorded for contacts:

1. Go to Tables > Contacts > Segments.

2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.

4. Click Email.

5. Click Bounced Date.

6. In the first pull-down menu, select one of the following:
   • Is The Same Day As
   • Is Not The Same Day As
   • Is Between
   • Is Not Between
   • Is Within The Last
   • Is Not Within The Last
   • Is Within The Next
   • Is Not Within The Next
   • Is Before
   • Is Before Or The Same Day As
• Is After
• Is After Or The Same Day As
• Is In Time Frame
• Is Not In Time Frame
• Is The Same Month As
• Is Not The Same Month As
• Is The Same Year As
• Is Not The Same Year As

7. If you selected

• Is The Same Day As, Is Not The Same Day As, Is Before, Is Before Or The Same Day As, Is After, or Is After Or The Same Day As in the previous step, enter a date in the text box using the date picker.

• Is Between or Is Not Between in the previous step, enter a starting date in the first text box and an ending date in the second text box.

• Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next in the previous step, enter a numerical value in the text box.

• Is In Time Frame or Is Not In Time Frame in the previous step, select one of the following:
  • Last Month
  • Last Quarter
  • Last Week (S-S)
  • Last Week (M-F)
  • Last Year
  • Next Month
  • Next Quarter
  • Next Week (S-S)
  • Next Week (M-F)
  • Next Year
  • This Month
  • This Quarter
  • This Week (S-S)
  • This Week (M-F)
  • This Year
  • Today
  • Tomorrow
  • Yesterday

• Is The Same Month As or Is Not The Same Month As in the previous step, select one of the following:
  • January
  • February
  • March
  • April
  • May
  • June
  • July
  • August
  • September
  • October
  • November
  • December

• Is The Same Year As or Is Not The Same Year As in the previous step, enter a numerical value in the text box corresponding to a year (e.g. 1987).
8. If you selected *Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next*, select one of the following from the last pull-down menu:
   - Days
   - Weeks
   - Months

   **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select *Is Within The Next Month*. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select *Is Within The Last Month*. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use contact throttling to prevent sending these contacts excessive messages.

   - Years

9. Optional: Click the *Ignore Year* checkbox if you want the segment to ignore the year as it evaluates the date for matches.

10. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Of Contacts Who Converted From An Email**

The *Converted* criterion allows you to create segments based on if contacts converted from an email you sent them.

You can filter contacts based on whether they converted from a delivery, delivery group, message, or campaign. If you track conversions from a campaign, only contacts who converted (or did not convert) from messages sent after January 29, 2018 will be included.

   **Note:** Segments do not collect tracking or order conversion data from test deliveries.

To create a segment based on if contacts converted:

1. Go to **Tables > Contacts > Segments**.

2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.

4. Click **Email**.

5. Click **Converted**.

6. In the first pull-down menu, select one of the following:
   - Converted From
   - Did Not Convert From

7. In the second pull-down menu, select one of the following:
   - Delivery
   - Delivery Group
   - Message
   - Campaign

   You will only see this option if you have enabled Campaigns.

8. Based on what you selected in the previous step, click either **Add A Delivery**, **Add A Delivery Group**, or **Add Message**, or **Add Campaign**.

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9. Based on what you selected in the previous step, click in the row associated with either a delivery, delivery group, message, or campaign.

   Note: Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

   Note:
   If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

10. Click Select.
   a) Click Add to select additional deliveries or delivery groups.

11. Click Add Criteria if you want to add another criteria.

If you select Converted From Delivery Group X, the criterion will include contacts who converted from any of the deliveries in Delivery Group X. If you select Did Not Convert From Delivery Group X, the criterion will include contacts who did not convert from any deliveries in Delivery Group X.

Create A Segment Of Contacts Who Opened An Email

The Opened criterion allows you to create segments based on if contacts opened an email you sent them.

To create a segment based on contact opens:

1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click Email.
5. Click Opened.
6. In the first pull-down menu, select one of the following:
   • Opened
   • Did Not Open
7. In the second pull-down menu, select one of the following:
   • Delivery
   • Delivery Group
   • Message
• Campaign

You will only see this option if you have enabled Campaigns.

8. Based on what you selected in the previous step, click either Add A Delivery, Add A Delivery Group, or Add Message, or Add Campaign.

9. Based on what you selected in the previous step, click in the row associated with either a delivery, delivery group, message, or campaign.

Note: Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

Note:

If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see Fix Invalid Segments on page 516.

10. Click Select.

a) Click Add to select additional deliveries or delivery groups.

11. Click Add Criteria if you want to add another criteria.

If you select Opened Delivery Group X, the criterion will include contacts who opened any of the deliveries in Delivery Group X. If you select Did Not Open Delivery Group X, the criterion will include contacts who did not open any deliveries in Delivery Group X.

Create A Segment Of Contacts Who Clicked Specific Links In An Email You Sent Them

The Specific Link Clicks criterion allows you to create segments of contacts who clicked on specific links in an email you sent them.

To create a segment of contacts who clicked on specific links in an email you sent them:

1. Go to Tables > Contacts > Segments.

2. To

• Create a new segment, click Create New Segment.
• Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click Add Rule.

If you want to add this criterion to an existing rule, skip this step.

4. Click Email.

5. Click Specific Link Clicks.

6. In the first pull-down menu, select one of the following:

• Clicked
• Did Not Click

7. In the second pull-down menu, select one of the following:
   • Delivery
   • Delivery Group
   • Message
   • All Messages

8. If you selected Delivery, Delivery Group, or Message in the previous step: Click Add A Delivery, Add A Delivery Group, or Add Message.

9. If you selected Delivery, Delivery Group, or Message: Click in the row associated with a delivery, delivery group, or message.

10. If you selected Delivery, Delivery Group, or Message: Click Select.

11. In the second pull-down menu, select one of the following:
   • On a Specific Link
   • On a Link Containing

12. If you selected On a Specific Link: Click Add A Link.

13. If you selected On a Specific Link: Click in the row associated with a link.

14. If you selected On a Specific Link: Click Select.
   a) Click Add to select additional links.

15. If you selected On a Link Containing: In the Enter a value text box, add a value that matches the URL used in the href attribute for a link.

   Tip: For example, if you enter "google", it will match

   ```html
   <a href="http://google.com">Some Link</a>
   ```
   but not

   ```html
   <a href="http://example.com">google</a>
   ```

16. Click Add Criteria if you want to add another criteria.

Create A Segment Of Contacts Who Were Sent An Email

The Was Sent criterion allows you to create segments based on if contacts were sent an email.

To create a segment based on if a contact was sent an email:

1. Go to Tables > Contacts > Segments.

2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.

4. Click Email.

5. Click Was Sent.

6. In the first pull-down menu, select one of the following:
   • Was Sent
   • Was Not Sent

7. In the second pull-down menu, select one of the following:
   • Delivery
   • Delivery Group
• Message
• Campaign

You will only see this option if you have enabled Campaigns.

8. Based on what you selected in the previous step, click either **Add A Delivery**, **Add A Delivery Group**, or **Add Message**, or **Add Campaign**.

9. Based on what you selected in the previous step, click in the row associated with either a delivery, delivery group, message, or campaign.

   **Note:** Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.

   **Note:**

   If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on fixing invalid segments, see **Fix Invalid Segments** on page 516.

10. Click **Select**.

    a) Click **Add** to select additional deliveries or delivery groups.

11. Click **Add Criteria** if you want to add another criteria.

If you select **Was Sent Delivery Group X**, the criterion will include contacts who were sent any of the deliveries in Delivery Group X. If you select **Was Not Sent Delivery Group X**, the criterion will include contacts who were not sent any deliveries in Delivery Group X.

**Create A Segment Based On Contacts Who Converted Via An Omniture Segment**

The **Converted via Omniture** criterion allows you to create segments based on contacts who converted via an Omniture segment.

   **Note:** The Omniture connection must be enabled in order to create segments based on contacts who converted via an Omniture segment. For more information on setting up the Omniture connection, see **Omniture Connection** on page 1299.

To create a segment based on contacts who converted via an Omniture segment:

1. Go to **Tables > Contacts > Segments**.

2. To

   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click **Add Rule**.

   If you want to add this criterion to an existing rule, skip this step.
4. Click **Email**.
5. Click **Converted via Omniture**.
6. In the first pull-down menu, select one of the following:
   - Delivery
   - Delivery Group
   - Message
7. Based on what you selected in the previous step, click either **Add A Delivery**, **Add A Delivery Group** or **Add Message**.
8. Based on what you selected in the previous step, click in the row associated with either a delivery, delivery group, or message.
   
   **Note:** Segments containing criteria in which a delivery group has been selected will be updated every 24 hours or when saving, refreshing, or sending to the segment.
   
   **Note:**

   If a custom delivery group is selected in a criterion and the delivery group contains more than 20,000 deliveries, an error will be shown. You will not be able to get contact counts for the criterion, the rule it is inside of, or the segment.

   ![Example Segment](https://example.com)

   There is also a limit of 100,000 deliveries per segment. If each criteria in a segment contains a custom delivery group with less than 20,000 deliveries, but the segment as a whole contains more than 100,000 deliveries, an error will be shown. These errors does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

   For more information on fixing invalid segments, see **Fix Invalid Segments** on page 516.

9. Click **Select**.
10. In the second pull-down menu (after the text **with Omniture segment named**), select an Omniture segment.
11. In the third pull down menu (after the text **and product name**), select one of the following:
   - Starts With
   - Does Not Start With
   - Contains
   - Does Not Contain
   - Is
   - Is Not
12. Enter a numerical or text value in the text box.
   
   **Tip:** Click **Add** to add multiple values.
13. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On The Last Date A Click Was Recorded For A Contact**

The **Last Click Date** criterion allows you to create segments based on the last date a click was recorded for a contact.

To create a segment based on the last click date recorded:

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.

4. Click **Email**.

5. Click **Last Click Date**.

6. In the first pull-down menu, select one of the following:
   • **Is The Same Day As**
   • **Is Not The Same Day As**
   • **Is Between**
   • **Is Not Between**
   • **Is Within The Last**
   • **Is Not Within The Last**
   • **Is Before**
   • **Is Before Or The Same Day As**
   • **Is After**
   • **Is After Or The Same Day As**
   • **Is In Time Frame**
   • **Is Not In Time Frame**
   • **Is The Same Month As**
   • **Is Not The Same Month As**
   • **Is The Same Year As**
   • **Is Not The Same Year As**

7. If you selected
   • **Is The Same Day As, Is Not The Same Day As, Is Before, Is Before Or The Same Day As, Is After, or Is After Or The Same Day As** in the previous step, enter a date in the text box using the date picker.
   • **Is Between or Is Not Between** in the previous step, enter a starting date in the first text box and an ending date in the second text box.
   • **Is Within The Last or Is Not Within The Last** in the previous step, enter a numerical value in the text box.
   • **Is In Time Frame or Is Not In Time Frame** in the previous step, select one of the following:
     • **Today**
     • **Yesterday**
     • **This Week (S-S)**
     • **This Week (M-F)**
     • **Last Week (S-S)**
     • **Last Week (M-F)**
     • **This Month**
     • **Last Month**
     • **This Quarter**
     • **Last Quarter**
     • **This Year**
     • **Last Year**
   • **Is The Same Month As or Is Not The Same Month As** in the previous step, select one of the following:
     • **January**
     • **February**
     • **March**
     • **April**
• May
• June
• July
• August
• September
• October
• November
• December

• **Is The Same Year As** or **Is Not The Same Year As** in the previous step, enter a numerical value in the text box corresponding to a year (e.g. 1987).

8. If you selected **Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next**, select one of the following from the last pull-down menu:

   • Days
   • Weeks
   • Months

   **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select Is Within The Next Month. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select Is Within The Last Month. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use contact throttling to prevent sending these contacts excessive messages.

   • Years

9. Optional: Click the **Ignore Year** checkbox if you want the segment to ignore the year as it evaluates the date for matches.

10. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On The Last Date An Open Was Recorded For A Contact**

The **Last Open Date** criterion allows you to create segments based on the last date an open was recorded for a contact.

To create a segment based on the last open date recorded:

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Email**.
5. Click **Last Open Date**.
6. In the first pull-down menu, select one of the following:
   • Is The Same Day As
   • Is Not The Same Day As
   • Is Between
   • Is Not Between
   • Is Within The Last
7. If you selected

- **Is The Same Day As, Is Not The Same Day As, Is Before, Is Before Or The Same Day As, Is After, or Is After Or The Same Day As** in the previous step, enter a date in the text box using the date picker.

- **Is Between or Is Not Between** in the previous step, enter a starting date in the first text box and an ending date in the second text box.

- **Is Within The Last or Is Not Within The Last** in the previous step, enter a numerical value in the text box.

- **Is In Time Frame or Is Not In Time Frame** in the previous step, select one of the following:
  - Today
  - Yesterday
  - This Week (S-S)
  - This Week (M-F)
  - Last Week (S-S)
  - Last Week (M-F)
  - This Month
  - Last Month
  - This Quarter
  - Last Quarter
  - This Year
  - Last Year

- **Is The Same Month As or Is Not The Same Month As** in the previous step, select one of the following:
  - January
  - February
  - March
  - April
  - May
  - June
  - July
  - August
  - September
  - October
  - November
  - December

- **Is The Same Year As or Is Not The Same Year As** in the previous step, enter a numerical value in the text box corresponding to a year (e.g. 1987).

8. If you selected **Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next**, select one of the following from the last pull-down menu:

- Days
- Weeks
• Months
  
  **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select Is Within The Next Month. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select Is Within The Last Month. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use contact throttling to prevent sending these contacts excessive messages.

• Years

9. Optional: Click the **Ignore Year** checkbox if you want the segment to ignore the year as it evaluates the date for matches.

10. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On The Last Date A Delivery Was Sent To A Contact**

The **Last Delivery Date** criterion allows you to create segments based on the last date a delivery was sent to a contact.

To create a segment based on the last delivery date recorded:

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Email**.
5. Click **Last Delivery Date**.
6. In the first pull-down menu, select one of the following:
   • Is The Same Day As
   • Is Not The Same Day As
   • Is Between
   • Is Not Between
   • Is Within The Last
   • Is Not Within The Last
   • Is Before
   • Is Before Or The Same Day As
   • Is After
   • Is After Or The Same Day AS
   • Is In Time Frame
   • Is Not In Time Frame
   • Is The Same Month As
   • Is Not The Same Month As
   • Is The Same Year As
   • Is Not The Same Year As
7. If you selected
   • **Is The Same Day As, Is Not The Same Day As, Is Before, Is Before Or The Same Day As, Is After, or Is After Or The Same Day As** in the previous step, enter a date in the text box using the date picker.
• **Is Between** or **Is Not Between** in the previous step, enter a starting date in the first text box and an ending date in the second text box.

• **Is Within The Last** or **Is Not Within The Last** in the previous step, enter a numerical value in the text box.

• **Is In Time Frame** or **Is Not In Time Frame** in the previous step, select one of the following:
  - Today
  - Yesterday
  - This Week (S-S)
  - This Week (M-F)
  - Last Week (S-S)
  - Last Week (M-F)
  - This Month
  - Last Month
  - This Quarter
  - Last Quarter
  - This Year
  - Last Year

• **Is The Same Month As** or **Is Not The Same Month As** in the previous step, select one of the following:
  - January
  - February
  - March
  - April
  - May
  - June
  - July
  - August
  - September
  - October
  - November
  - December

• **Is The Same Year As** or **Is Not The Same Year As** in the previous step, enter a numerical value in the text box corresponding to a year (e.g. 1987).

8. If you selected **Is Within The Last, Is Not Within The Last, Is Within The Next, or Is Not Within The Next**, select one of the following from the last pull-down menu:
  - Days
  - Weeks
  - Months

  **Note:** When you select a month-based option, Bronto uses the current date in the month and the same date in either the previous month or the next month to create a range. For example, you select Is Within The Next Month. On June 4th, the next month will be June 4th - July 4th. On June 5th, the next month will be June 5th - July 5th, and so on. However, not all months have equal days. When this happens Bronto continues to use the last day of the next or previous month, which can sometimes lead to a contact staying on a segment longer than intended. For example, you select Is Within The Last Month. From March 28th - March 31st February 28th will be used as part of segment because (most years) there is no February 29th-31st. This means a contact could stay on this segment for 4 days past what was intended. If you're using this segment with a workflow you can use contact throttling to prevent sending these contacts excessive messages.

• Years

9. Optional: Click the **Ignore Year** checkbox if you want the segment to ignore the year as it evaluates the date for matches.

10. Click **Add Criteria** if you want to add another criteria.
**GeoIP Segment Criteria**

An introduction to GeoIP segment criteria.

Creating segments based on GeoIP data allows you to create segments based on location data stored for your contacts. This includes city, state, country, and more. The location information that is returned is the most frequently occurring IP address in a 14 day period. The 14 day period consists of the 14 days prior to most recent click/open activity.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

In this section you will find an explanation of the different types of segments you can create based on GeoIP data.

**Create A Segment Based On What City Contacts Are Located In**

The **City** criterion allows you to create segments based on the city contacts are located in.

The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.

For more information on the GeoIP City metric, see GeoIP City Metric on page 874.

To create a segment based on the city contacts are located in:

1. Go to Tables > Contacts > Segments.
2. To
   - Create a new segment, click Create New Segment.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click GeoIP.
5. Click City.
6. From the first pull-down menu, select one of the following:
   - Starts With
   - Does Not Start With
   - Ends With
   - Does Not End With
   - Contains
   - Does Not Contain
   - Is
   - Is Not
   - Is Empty
   - Is Not Empty
7. In the input, add some text corresponding to the city you want to segment on.
   - For example Durham, Chicago, San Francisco, etc.
   a) Click Add to add multiple cities.
8. Click Add Criteria if you want to add another criteria.

**Related Topics**

GeoIP City Metric on page 874

The GeoIP City metric is the most frequent, non-mobile IP address recorded for a contact.

**Create A Segment Based On What Country Code Contacts Are Located In**

The **Country Code** criterion allows you to create segments based on the country code associated with the country contacts are located in.
To create a segment based on the country code contacts are located in:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **GeoIP**.
5. Click **Country Code**.
6. From the first pull-down menu, select one of the following:
   - Starts With
   - Does Not Start With
   - Ends With
   - Does Not End With
   - Contains
   - Does Not Contain
   - Is
   - Is Not
   - Is Empty
   - Is Not Empty
7. In the input, add some text corresponding to the country code you want to segment on.
   For example USA, GBR, ESP, etc.
   Click **Add** to add multiple country codes.
8. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Based On What Country Contacts Are Located In**

The **Country Name** criterion allows you to create segments based on the country contacts are located in.

The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields.

For more information on the GeoIP Country metric, see **GeoIP Country Metric** on page 874.

To create a segment based on the name of the country contacts are located in:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **GeoIP**.
5. Click **Country Name**.
6. From the first pull-down menu, select one of the following:
   - Starts With
   - Does Not Start With
   - Ends With
• Does Not End With
• Contains
• Does Not Contain
• Is
• Is Not
• Is Empty
• Is Not Empty

7. In the input, add some text corresponding to the name of the country you want to segment on.
   For example United States, Great Britain, Spain, etc.
   a) Click Add to add multiple country names.

8. Click Add Criteria if you want to add another criteria.

Create A Segment Based On What Postal/ZIP Code Contacts Are Located In

The Postal/ZIP Code criterion allows you to create segments based on the Postal/ZIP code contacts are located in.

The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields.

For more information on the GeoIP Postal/ZIP code metric, see GeoIP Postal/ZIP Code Metric on page 876.

To create a segment based on the Postal/ZIP code contacts are located in:

1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon 📝 in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click GeoIP.
5. Click Postal/ZIP Code.
6. From the first pull-down menu, select one of the following:
   • Starts With
   • Does Not Start With
   • Ends With
   • Does Not End With
   • Contains
   • Does Not Contain
   • Is
   • Is Not
   • Is Empty
   • Is Not Empty
7. In the input, add some text corresponding to the Postal/ZIP code you want to segment on.
   For example 27701, 90210, etc.
8. Click Add Criteria if you want to add another criteria.

Create A Segment Based On A Contact's Proximity To A Postal/ZIP Code

The Postal/ZIP Code Radius criterion allows you to create segments based on a contact's proximity to a specific postal/ZIP code. For example, you could target all contacts within 20 miles of 27701.

To create a segment based on postal/ZIP code radius:
1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click GeoIP.
5. Click Postal/ZIP Code Radius.
6. From the first pull-down menu, select one of the following:
   • Is Less Than
   • Is Greater Than
7. Enter a numerical value in the first text box.
8. In the second pull-down menu, select one of the following:
   • Miles
   • Kilometers
9. In the second input, after the word From, enter a postal/ZIP code.
10. In the last pull-down menu, select the country the postal/ZIP code(s) you entered belongs to.
    Tip: Use the pull-down menu or search box to locate a country by name.
11. Click Add Criteria if you want to add another criteria.

Create A Segment Based On What State Or Region Contacts Are Located In

The State/Region criterion allows you to create segments based on the state or region contacts are located in.

The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields.

To create a segment based on the state or region contacts are located in:
1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click GeoIP.
5. Click State/Region.
6. From the first pull-down menu, select one of the following:
   • Starts With
   • Does Not Start With
   • Ends With
   • Does Not End With
   • Contains
   • Does Not Contain
   • Is
   • Is Not
   • Is Empty
7. In the input, add some text corresponding to the name of the state or region you want to segment on.

   **Tip:** Click **Add** to add multiple states or regions.

8. Click **Add Criteria** if you want to add another criteria.

### Create A Segment Based On What Time Zone Contacts Are Located In

The **Time Zone** criterion allows you to create segments based on the time zone contacts are located in.

The **GeoIP Time Zone** metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.

For more information on the GeoIP Time Zone metric, see GeoIP Time Zone Metric on page 875.

To create a segment based on the time zone contacts are located in:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 💂 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **GeoIP**.
5. Click **Time Zone**.
6. From the first pull-down menu, select one of the following:
   - Is
   - Is Not
   - Is Empty
   - Is Not Empty
7. Only if you selected **Is** or **Is Not**: Select the time zone using the pull-down menu.
   - a) Click **Add** to add multiple time zones.
8. Click **Add Criteria** if you want to add another criteria.

### Membership Segment Criteria

Creating segments based on membership allows you to segment on the lists contacts are subscribed to.

### Create A Segment Based On List Membership

The **List Membership** criterion allows you to create segments based on if contacts are on, or not on, specific lists.

You can also use the **Not On Any List** option to create a segment of orphaned contacts.

To create a segment based on list membership:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 💂 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **Membership**.
5. Click **List Membership**.
6. In the first pull-down menu, select one of the following:
   - **On List**: to create a segment based on members of a specific list
   - **Not On List**: to create a segment based on members who do not belong to a list
   - **Not On Any List**: to create a segment of orphaned contacts

7. Click **Add List**.

8. Click in a row associated with a list.

9. Click **Select**.

10. Click **Add Criteria** if you want to add another criteria.

   **Tip**: Click **Add** to add multiple numerical lists.

### Performance Segment Criteria

Creating segments based on performance allows you to create segments based on performance data stored in your account. This includes total sent, open rate, total revenue, and more. Below you will find an explanation of the different types of segments you can create based on contact performance. You can use the tables below to see all of the possible **Criterion**, **Operators**, and **Values** that you can use to create segments. To begin creating segments, go to **Tables > Contacts > Segments** and click **Create Segment**.

#### Create A Segment Based On Contact Email Click Rates

The **Click Rate** criterion allows you to create segments based on the click rate recorded for contacts.

To create a segment based on the click rate:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon ✍️ in the row associated with the segment you want to edit.
3. Click **Add Rule**.

   If you want to add this criterion to an existing rule, skip this step.
4. Click **Performance**.
5. Click **Click Rate**.
6. In the first pull-down menu, select one of the following:
   - Equals
   - Is Not Equal To
   - Is Less Than
   - Is Less Than Or Equal To
   - Is Greater Than
   - Is Greater Than Or Equal To
7. Enter a number in the text box.
   a) Click **Add** to add multiple numerical lists.
8. Click **Add Criteria** if you want to add another criteria.

#### Create A Segment Based On Contact Email Conversion Rates

The **Conversion Rate** criterion allows you to create segments based on the conversion rate recorded for contacts.

**Note**: Segments do not collect tracking or order conversion data from test deliveries.

To create a segment based on the conversion rate:

1. Go to **Tables > Contacts > Segments**.
2. To
• Create a new segment, click **Create New Segment**.
• Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. **Click Add Rule.**
   If you want to add this criterion to an existing rule, skip this step.

4. **Click Performance.**

5. **Click Conversion Rate.**

6. In the first pull-down menu, select one of the following:
   • Equals
   • Is Not Equal To
   • Is Less Than
   • Is Less Than Or Equal To
   • Is Greater Than
   • Is Greater Than Or Equal To

7. Enter a number in the text box.

   **Tip:** Click **Add** to add multiple numerical lists.

8. **Click Add Criteria** if you want to add another criteria.

**Create A Segment Based On Contact Email Open Rates**

The **Open Rate** criterion allows you to create segments based on the open rate recorded for contacts.

To create a segment based on the open rate:

1. Go to **Tables > Contacts > Segments.**
2. To
   • Create a new segment, click **Create New Segment.**
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. **Click Add Rule.**
   If you want to add this criterion to an existing rule, skip this step.

4. **Click Performance.**

5. **Click Open Rate.**

6. In the first pull-down menu, select one of the following:
   • Equals
   • Is Not Equal To
   • Is Less Than
   • Is Less Than Or Equal To
   • Is Greater Than
   • Is Greater Than Or Equal To

7. Enter a number in the text box.

   **Tip:** Click **Add** to add multiple numerical lists.

8. **Click Add Criteria** if you want to add another criteria.

**Create A Segment Based On The Number Of Emails Sent To Contacts**

The **Total Sent Emails** criterion allows you to create segments based on the number of emails sent to contacts.

To create a segment based on the number of emails sent to contacts:

1. Go to **Tables > Contacts > Segments.**
2. To
• Create a new segment, click **Create New Segment**.
• Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.

3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.

4. Click **Performance**.

5. Click **Total Sent Emails**.

6. In the first pull-down menu, select one of the following:
   • Equals
   • Is Not Equal To
   • Is Less Than
   • Is Less Than Or Equal To
   • Is Greater Than
   • Is Greater Than Or Equal To

7. Enter a number in the text box.
   a) Click **Add** to add multiple numerical lists.

8. Click **Add Criteria** if you want to add another criteria.

**Technology Segment Criteria**

Creating segments based on technology allows you to create segments based on the technology your contacts use. This includes operating system, browser type, and mobile browsing preferences. Below you will find an explanation of the different types of segments you can create based on contact technology.

**Create A Segment Based On The Operating System Used By Contacts**

The **Operating System** criterion allows you to create segments based on the operating system used by contacts when opening emails you send them.

The operating system stored for a contact is a reflection of the operating system they use most (mode) when opening emails you have sent them.

**Tip:** Go to **Tables > Contacts > Search Contacts**, search for your contacts, then view the **Operating System** column to find out the operating system a contact uses most often when opening emails you have sent them.

For more information on the Operating System metric, see **Opens Metric** on page 882.

To create a segment based on the operating system used by contacts:

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.

4. Click **Technology**.

5. Click **Operating System**.

6. From the first pull-down menu, select one of the following:
   • Starts With
   • Does Not Start With
   • Ends With
   • Does Not End With
   • Contains
• Does Not Contain
• Is
• Is Not
• Is Empty
• Is Not Empty

7. In the input, add some text corresponding to the operating system you want to segment on.
   For example, Windows, OS X, etc.
8. Click Add Criteria if you want to add another criteria.

Related Topics
Opens Metric on page 882
The opens metric represents the unique opens.

Create A Segment Based On The Browser Used By Contacts
The Primary Browser criterion allows you to create segments based on the primary browser (desktop or mobile) used by contacts when opening emails you send them.
The primary browser stored for a contact is a reflection of the browser they use most (mode) when opening emails you have sent them. This could be a mobile or a web browser.

Tip: Go to Tables > Contacts > Search Contacts, search for your contacts, then view the Primary Browser column to find out the primary browser a contact uses when opening emails you have sent them.

For more information on the Primary Browser metric, see Primary Browser Metric on page 884.

To create a segment based on the primary browser used by contacts:
1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click Technology.
5. Click Primary Browser.
6. From the first pull-down menu, select one of the following:
   • Starts With
   • Does Not Start With
   • Ends With
   • Does Not End With
   • Contains
   • Does Not Contain
   • Is
   • Is Not
   • Is Empty
   • Is Not Empty
7. In the input, add some text corresponding to the browser you want to segment on.
   For example Chrome, Firefox, Safari, Mobile Safari, Android etc.
8. Click Add Criteria if you want to add another criteria.

Related Topics
Primary Browser Metric on page 884
The primary browser metric represents primary browser used by a contact. This includes mobile and non-mobile browsers.

**Create A Segment Based On The Mobile Browser Used By Contacts**

The **Mobile Browser** criterion allows you to create segments based on mobile browser used by contacts when opening emails you send them.

The mobile browser stored for a contact is a reflection of the mobile browser they use most (mode) when opening emails you have sent them.

**Tip:** Go to **Tables > Contacts > Search Contacts**, search for your contacts, then view the **Mobile Browser** column to find out the mobile browser a contact uses when opening emails you have sent them.

For more information on the Mobile Browser metric, see **Mobile Browser Metric** on page 879.

To create a segment based on the mobile browser used by contacts:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **Technology**.
5. Click **Mobile Browser**.
6. From the first pull-down menu, select one of the following:
   - Starts With
   - Does Not Start With
   - Ends With
   - Does Not End With
   - Contains
   - Does Not Contain
   - Is
   - Is Not
   - Is Empty
   - Is Not Empty
7. In the input, add some text corresponding to the mobile browser you want to segment on.
   - For example **Mobile Safari**, **Android**, etc.
8. Click **Add Criteria** if you want to add another criteria.

**Related Topics**

- **Mobile Browser Metric** on page 879
- The mobile browser metric represents the mobile browser used by a contact.

**Create A Segment Based On The Email Client Used By Contacts**

The **Primary Email Client** criterion allows you to create segments based on the email client used by contacts to open emails you send them.

The primary email client stored for a contact is a reflection of the email client they use most (mode) to open emails you have sent them. This could be a mobile, web, or desktop email client.

**Tip:** Go to **Tables > Contacts > Search Contacts**, search for your contacts, then view the **Primary Email Client** column to find out the email client a contact uses when opening emails you have sent them.

For more information on the Primary Email Client metric, see **Primary Email Client Metric** on page 885.
To create a segment based on the primary email client used by contacts:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 🆆 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Technology**.
5. Click **Primary Email Client**.
6. From the first pull-down menu, select one of the following:
   - Starts With
   - Does Not Start With
   - Ends With
   - Does Not End With
   - Contains
   - Does Not Contain
   - Is
   - Is Not
   - Is Empty
   - Is Not Empty
7. In the input, add some text corresponding to the email client you want to segment on.
   For example Gmail, Outlook, Apple Mail, Yahoo, etc.
8. Click **Add Criteria** if you want to add another criteria.

Related Topics

**Primary Email Client Metric** on page 885
The primary email client metric represents primary email client used by the contact. This includes mobile and non-mobile email clients.

**Create A Segment Based On The Mobile Email Client Used By Contacts**

The **Mobile Email Client** criterion allows you to create segments based on the mobile client used by contacts to open emails you send them.

The mobile email client stored for a contact is a reflection of the mobile email client they use most (mode) to open emails you have sent them.

**Tip:** Go to **Tables > Contacts > Search Contacts**, search for your contacts, then view the **Mobile Email Client** column to find out the mobile email client a contact uses most often to open emails you have sent them.

For more information on the Mobile Email Client metric, see **Mobile Email Client Metric** on page 880.

To create a segment based on the mobile email client used by contacts:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 🆆 in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **Technology**.
5. Click Mobile Email Client.
6. From the first pull-down menu, select one of the following:
   • Starts With
   • Does Not Start With
   • Ends With
   • Does Not End With
   • Contains
   • Does Not Contain
   • Is
   • Is Not
   • Is Empty
   • Is Not Empty
7. In the input, add some text corresponding to the email client you want to segment on.
   For example iPhone, Blackberry, Windows Live Mail etc.
8. Click Add Criteria if you want to add another criteria.

Related Topics
Mobile Email Client Metric on page 880
The mobile email client metric represents the mobile browser used by a contact.

SMS Segment Criteria
Creating segments based on contact SMS metrics allows you to segment on contact level SMS metrics such as if they were sent a particular SMS message or delivery, if they clicked a link in an SMS, or if an SMS they were sent bounced.

Note: In order to use the SMS criteria, you need to have SMS enabled in your account. For more information on enabling SMS in your account, contact your Account Manager.

Create A Segment Of Contacts Who Were Sent An SMS
The Was Sent criterion allows you to create segments based on if contacts were sent an SMS.

To create a segment based on if a contact was sent an SMS:
1. Go to Tables > Contacts > Segments.
2. To
   • Create a new segment, click Create New Segment.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click Add Rule.
   If you want to add this criterion to an existing rule, skip this step.
4. Click SMS
5. Click Was Sent.
6. In the first pull-down menu, select one of the following:
   • Was Sent
   • Was Not Sent
7. In the second pull-down menu, select one of the following:
   • SMS Delivery
   • SMS Messages
8. Based on what you selected in the previous step, click either Add An SMS Delivery or Add An SMS Message.
9. Based on what you selected in the previous step, click in the row associated with either an SMS delivery or an SMS message.
10. Click **Select**.
   a) Click **Add** to select additional deliveries or delivery groups.
11. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Of Contacts Who Clicked Any Link In An SMS You Sent Them**

The **Any Link Clicks** criterion allows you to create segments of contacts who clicked on any link in an SMS you sent them.

To create a segment of contacts who clicked on any link in an SMS you sent them:

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **SMS**
5. Click **Any Link Clicks**.
6. In the first pull-down menu, select one of the following:
   • Clicked
   • Did Not Click
7. In the second pull-down menu, select one of the following:
   • SMS Delivery
   • SMS Messages
8. Based on what you selected in the previous step, click either **Add An SMS Delivery** or **Add An SMS Message**.
9. Based on what you selected in the previous step, click in the row associated with either an SMS delivery or an SMS message.
10. Click **Select**.
   a) Click **Add** to select additional deliveries or delivery groups.
11. Click **Add Criteria** if you want to add another criteria.

**Create A Segment Of Contacts Who Were Sent An SMS That Ended Up Bouncing**

The **Bounced** criterion allows you to create segments based on if contacts were sent an SMS that ended up bouncing.

To create a segment based on if a contact was sent an SMS that ended up bouncing:

1. Go to **Tables > Contacts > Segments**.
2. To
   • Create a new segment, click **Create New Segment**.
   • Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   If you want to add this criterion to an existing rule, skip this step.
4. Click **SMS**
5. Click **Bounced**.
6. In the second pull-down menu, select one of the following:
   • SMS Delivery
   • SMS Messages
7. Based on what you selected in the previous step, click either **Add An SMS Delivery** or **Add An SMS Message**.
8. Based on what you selected in the previous step, click in the row associated with either an SMS delivery or an SMS message.
9. Click **Select**.
   a) Click **Add** to select additional deliveries or delivery groups.
10. Click **Add Criteria** if you want to add another criteria.

## Segment Templates

Bronto provides templates you can use to quickly configure segments of your contacts.

Many of these templates are designed to be used with different workflow templates so that you can better target your marketing campaigns.

To use a segment template, simply copy the template then modify the copy as needed. This can be done on the main segments page by selecting the checkbox for the template, then clicking the **Copy** button. To edit the copy, click the pencil icon to the right of the segment template copy. When you edit your segment template you can adjust any of the existing criteria or add new rules and criteria.

The following table describes all of the Bronto-provided segment templates:

<table>
<thead>
<tr>
<th>Template</th>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
</table>
| VIP Purchasers - Total Revenue $1,000+ | • RFM Metrics Where Total Orders Is Greater Than Or Equal To 2: targets contacts who have placed at least 2 orders  
  • RFM Metrics Where Total Revenue Is Greater Than Or Equal To 1,000: targets contacts who have spent more than 1,000 | This segment is designed to target contacts who have spent more than $1,000 on at least 2 items. By default, the template does not take into account when the orders were placed. If you want this taken into consideration, you can add the RFM Metrics Where Last Order Date criteria to refine the segment setting.  
  A good strategy would be to use this segment template with the VIP Campaign Message workflow template in order to market to high spenders. See VIP Campaign Message Workflow Template on page 405 for more information. |
| VIP Purchasers - Total Orders 20+   | • RFM Metrics Where Total Orders Is Greater Than Or Equal To 20: targets contacts who have purchased more than 20 products | This segment is designed to target contacts who have bought several products from you and can be used to market to these frequent purchasers. The segment does not take into account revenue or purchase date; you can add additional segment criteria if you want to refine the segment membership to a more narrow list of contacts.  
  A good strategy would be to use this segment template with the VIP Campaign Message workflow template in order to market to high-volume purchasers. See VIP Campaign Message Workflow Template on page 405 for more information. |
<table>
<thead>
<tr>
<th>Template</th>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orphaned Contacts</td>
<td>• The Contact Is Not On Any List: targets contacts who do not have a list membership in Bronto</td>
<td>This segment identifies contacts who are not on any of your lists. You can use this segment to take a deeper look at why some contacts might not be assigned to lists or you can use it with a workflow that attempts to engage orphaned contacts so they are moved onto a list based on their engagement.</td>
</tr>
<tr>
<td>Non-Engaged Subscribers - NoOpens in Last 50 Messages</td>
<td>• Contacts Who Have Not Opened Your Last 50 Received Messages: targets contacts who do not have Opens metrics for any of the last 50 emails you have sent them</td>
<td>This segment identifies contacts who have not opened any of the last 50 messages you have sent to them. You can use this template with the Non-Engaged Series workflow template in order to try to engage these contacts. See Non-Engaged Series Workflow Template on page 412 for more information.</td>
</tr>
<tr>
<td>Non-Engaged Subscribers - NoOpens in Last 25 Messages</td>
<td>• Contacts Who Have Not Opened Your Last 25 Received Messages: targets contacts who do not have Opens metrics for any of the last 25 emails you have sent them</td>
<td>This segment identifies contacts who have not opened any of the last 25 messages you have sent to them. You can use this template with the Non-Engaged Series workflow template in order to try to engage these contacts. See Non-Engaged Series Workflow Template on page 412 for more information.</td>
</tr>
</tbody>
</table>
| Non-Engaged Subscribers - No Activity for 6 Months | • The Contact's Creation Date Is Not Within The Last 360 Days: excludes contacts who were added to your account within the last 360 days  
• The Contact's Last Sent Date Is Within The Last 180 Days: targets contacts who have been sent email within the last 180 days  
• RFM Metrics Where Last Order Date Is Not Within The Last 180 Days: targets contacts who have not placed an order within the last 180 days  
• The Contact's Last Opened Date Is Not Within The Last 180 Days: targets contacts who do not have Opens metrics for the last 180 days | This segment identifies contacts who have been sent messages but have not engaged with any of them within the last six months. For this segment, lack of engagement means the contact has not opened any messages or placed any orders. These contacts must have been created at least 360 days before the current day. You can use this template with the Non-Engaged Series workflow template in order to try to engage these contacts. See Non-Engaged Series Workflow Template on page 412 for more information. |
<table>
<thead>
<tr>
<th>Template</th>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
</table>
| Non-Engaged Subscribers - No Activity for 12 Months | • The Contact's Creation Date Is Not Within The Last 540 Days: excludes contacts who were added to your account within the last 540 days  
• The Contact's Last Sent Date Is Within The Last 360 Days: targets contacts who have been sent email within the last 360 days  
• RFM Metrics Where Last Order Date Is Not Within The Last 360 Days: targets contacts who have not placed an order within the last 360 days  
• The Contact's Last Opened Date Is Not Within The Last 360 Days: targets contacts who do not have Opens metrics for the last 180 days | This segment identifies contacts who have been sent messages but have not engaged with any of them within the last 12 months. For this segment, lack of engagement means the contact has not opened any messages or placed any orders. These contacts must have been created at least 360 days before the current day. You can use this template with the Non-Engaged Series workflow template in order to try to engage these contacts. See Non-Engaged Series Workflow Template on page 412 for more information. |
<p>| New Subscribers - Within Last 7 Days           | • The Contact's Creation Date Is Within The Last 7 Days: targets contacts who have been added to Bronto within the last 7 days | This segment identifies contacts who have been added to Bronto within the past week. You can use this template with any of the Welcome Message or Welcome Series workflow templates in order to quickly engage new contacts. See Welcome Message Workflow Template on page 398, Welcome Series Workflow Template on page 399, Welcome Message w/ Purchase History Check Workflow Template on page 401, or Welcome Message w/ Manage Preferences Workflow Template on page 403 for more information. |</p>
<table>
<thead>
<tr>
<th>Template</th>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Subscribers - Within Last 30 Days</td>
<td>• The Contact's Creation Date Is Within The Last 30 Days: targets contacts who have been added to Bronto within the last 30 days</td>
<td>This segment identifies contacts who have been added to Bronto within the past 30 days. You can use this template with any of the Welcome Message or Welcome Series workflow templates in order to quickly engage new contacts. See Welcome Message Workflow Template on page 398, Welcome Series Workflow Template on page 399, Welcome Message w/ Purchase History Check Workflow Template on page 401, or Welcome Message w/ Manage Preferences Workflow Template on page 403 for more information.</td>
</tr>
<tr>
<td>New Subscribers - Today</td>
<td>• The Contact's Creation Date Is In Time Frame Today: targets contacts who have been added to Bronto within the last day</td>
<td>This segment identifies contacts who were added to Bronto within the past 24 hours. Once contacts pass the 24 hour mark they are immediately moved off of this segment. You can use this template with any of the Welcome Message or Welcome Series workflow templates in order to quickly engage new contacts. A successful marketing strategy might involve using the three New Subscribers segments with a Welcome Series workflow in order to send a contact different messages as they move from segment to segment. See Welcome Message Workflow Template on page 398, Welcome Series Workflow Template on page 399, Welcome Message w/ Purchase History Check Workflow Template on page 401, or Welcome Message w/ Manage Preferences Workflow Template on page 403 for more information.</td>
</tr>
<tr>
<td>Template</td>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Never Purchased - 6 Months After Subscribing           | • The Contact's Creation Date Is 180 Days Ago: targets contacts who were added to Bronto 180 days ago  
• RFM Metrics Where Total Orders Equals 0: targets contacts who have not placed any orders | This segment targets contacts who have not made a purchase within the first six months of being a contact. By default, this segment does not check for other engagement metrics.  
You can use this template with the Never Purchased Series workflow template to encourage contacts to place their first order. See Never Purchased Series Workflow Template on page 408 for more information. |
| Never Purchased - 12 Months After Subscribing          | • The Contact's Creation Date Is 365 Days Ago: targets contacts who were added to Bronto 365 days ago  
• RFM Metrics Where Total Orders Equals 0: targets contacts who have not placed any orders | This segment targets contacts who have not made a purchase within the first year of being a contact. By default, this segment does not check for other engagement metrics.  
You can use this template with the Never Purchased Series workflow template to encourage contacts to place their first order. See Never Purchased Series Workflow Template on page 408 for more information. |
| Lapsed Purchaser - No Orders in 6 Months               | • RFM Metrics Where Total Orders Is Greater Than Or Equal To 1: targets contacts who have placed at least 1 order  
• RFM Metrics Where Last Order Date Is Not Within The Last 180 Days: excludes contacts who have placed an order within the last 180 days | This segment targets contacts who placed an order but their last order was over six months ago. By default, this segment does not check for other engagement metrics.  
You can use this template with the Lapsed Purchaser Series workflow template to encourage contacts to place a new order. See Lapsed Purchaser Series Workflow Template on page 410 for more information. |
| Lapsed Purchaser - No Orders in 3 Months               | • RFM Metrics Where Total Orders Is Greater Than Or Equal To 1: targets contacts who have placed at least 1 order  
• RFM Metrics Where Last Order Date Is Not Within The Last 90 Days: excludes contacts who have placed an order within the last 90 days | This segment targets contacts who placed an order but their last order was over three months ago. By default, this segment does not check for other engagement metrics.  
You can use this template with the Lapsed Purchaser Series workflow template to encourage contacts to place a new order. See Lapsed Purchaser Series Workflow Template on page 410 for more information. |

**Related Topics**

**Workflow Templates** on page 398
Workflow templates are pre-built workflows that allow you to accomplish many common marketing campaigns.
**Keep Segments Up-To-Date**

Contacts on a segment are automatically kept up-to-date, but if you make changes to criteria used to build a segment you will need to update your segment criteria selections.

Contacts are automatically moved onto a segment when they match the segment's criteria and off of the segment when they no longer match the criteria. So, in that sense, segments are automatically kept up-to-date.

However, some criteria used to build a segment can be changed in Bronto. For example, you could delete information you used to build your segment. If you make these types of changes in Bronto you will need to manually update your segment. For example, if you delete a contact field that was used to build a segment, that segment will no longer be able to use the contact field information. Therefore, the segment might not perform as expected until it is updated.

Also, the length of time we will keep contact-level sent, opened, clicked, and/or conversion rate metrics are subject to your account's data retention policy at the time the segment was created. If your data retention period changes after you created a segment, the segment will still use the data retention policy that was in place at the time the segment was built. You should consider data retention when building segments that use these metrics as operators for your segment. For more information on the data retention policy, see Data Retention Policy on page 1509.

ℹ️ **Tip:** For more information on selecting a segment as a recipient in a delivery, see Select Email Recipients on page 281.

Finally, some criteria that segments use is updated on a nightly basis, not in real-time. Any segment that uses this type of criteria will also be updated on a nightly basis. Criteria updated nightly includes:

- Metrics for delivery groups you have created.
- RFM metrics - only when your account does not use Order Service.

For example, if you built a segment using delivery group metrics, when you view the segment the contacts on that segment will not reflect the current day's metrics. However, if you send a message Bronto will refresh these metrics and the segment during delivery prep so that your message is sent using up-to-date criteria.

**Related Topics**

- Select Email Recipients on page 281

In the Select Recipients section, you will choose who will receive the email message.

**Segment Labels**

Segment labels can be used to organize and visually group segments.

Labels allow you to group objects in the platform together in order to sort and compare related data. After a label is created you have the option of color coding the label so that you can use label colors to quickly identify related segments. You can also filter segments using labels and label colors.

<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a new label to a segment</td>
<td>1. Click the Add/Remove Labels icon in the row associated with a segment. 2. On the Add labels tab, click the Add new radio button. 3. Add a name for the label in the text box. 4. Click Add Label. 5. Click Save Changes. The new label is immediately created and applied to the segment.</td>
</tr>
<tr>
<td>To</td>
<td>Do This</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| Add an existing label to a segment | 1. Click the Add/Remove Labels icon in the row associated with a segment.  
2. On the Add labels tab, click the Select from existing radio button.  
3. Click the checkbox next to the labels you want to add to the segment.  
4. Click Add Label.  
5. Click Save Changes.  
The new label is immediately created and applied to the segment. |
| Change the color of a segment label | If this label is used on multiple segments, all instances of this label are updated to the new color.  
1. Click on the label in the segments grid.  
2. Click the color you want the segment label to be.  
3. Click Save Changes. |
| Remove a label from a segment | This only removes the label from this segment. The label will maintain its association with any other segments it is currently associated with.  
1. Click the Add/Remove Labels icon in the row associated with a segment.  
2. Click the Remove existing labels tab.  
3. Click the X for the labels you want to remove.  
4. Click Save Changes. |
| Edit the name of a segment label | If this label is used on multiple segments, all instances of this label are updated to the new name.  
1. Click on the label in the segments grid.  
2. Type the new name where the current label name is.  
3. Click Save Changes. |
| Delete a segment label | This deletes all instances of the segment label.  
1. Click on the label in the segments grid.  
2. Select the Delete this label? box.  
3. Click Save Changes. |
| Filter the segments grid by label | Above the segments grid are two label-based filter options:  
• Filter By Label list to filter the grid by a specific label.  
• Filter By Label Color list to filter the grid by a specific label color. |
### Segment Overview Page

On the **Segment Overview** page, you can view all the metrics for a segment, as well as perform various actions on that segment.

#### View The Average Performance Of Deliveries Sent To A Segment

To view the average performance metrics for deliveries sent to a segment:

1. Go to **Tables > Contacts > Segments**.
2. Click on the name of a segment.

**Warning:** The length of time we will keep contact-level sent, opened, clicked, and/or conversion rate metrics are subject to your account's data retention policy at the time the segment was created. If your data retention period changes after you created a segment, the segment will still use the data retention policy that was in place at the time the segment was built. You should consider data retention when building segments using these metrics as operators for your segment. For more information on the data retention policy, see Data Retention Policy on page 1509.

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered.  DMA/EEC equivalent: <strong>Render Rate</strong> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em>  The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
</tbody>
</table>

**View The Email Addresses By Domain On A Segment**

The **Email Addresses by Domain** chart on the **Segment Overview** page shows you the domains being used by the contacts on the segment you are viewing.

![Email Addresses by Domain Chart](image)

To view the Email Addresses by Domain chart for a segment:

1. Go to **Tables > Contacts > Segments**.
2. Click on the name of a segment.

**View Overall Performance Metrics For Deliveries Sent To A Segment**

The **Overall Performance** table lets you view metrics associated with the specific deliveries sent to a segment.

*Note:* Segments do not collect tracking or order conversion data from test deliveries.

![Overall Performance Table](image)

You can generate a report based on a specific delivery by clicking ![Report Icon].

*Note:* For messages with a type of **Split**, the metrics displayed in the table represent the data for the entire split test and are not limited to the specific list or segment you are viewing.

To view the Overall Performance table for a segment:
1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.

You can view the following metrics:

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name</td>
<td>The Message Name column displays the name of the email message.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
| Send Date     | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  

- 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  

- 🕒 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A                            |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery Type</strong></td>
<td>The delivery Type represents the type of send. Each type is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• <em>Normal</em> - The <em>Normal</em> email delivery type represents a regular email delivery sent to more than one contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Bulk</em> - The <em>Bulk</em> email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Skipped</em> - The <em>Skipped</em> email delivery type represents email messages that were skipped by Bronto and not sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Single Contact</em> - The <em>Single Contact</em> email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as <em>Single Contact</em>, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Test</em> - The <em>Test</em> email delivery type represents email deliveries that were sent as test deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>AMR</em> - The <em>AMR</em> email delivery type represents email deliveries that were sent via an <em>Automated Message Rule</em>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Split Group</em> - The <em>Split Group</em> email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>FTAF</em> - The <em>Forwards to a Friend</em> email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Transactional</em> - The <em>Transactional</em> email delivery type represents email deliveries were sent as transactional emails.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

Note: Transactional deliveries are hidden by default. For information on how to show them, see View Transactional Email Deliveries on page 1014.
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <strong>Render Rate</strong> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <strong>Click to Open Rate (CTO)</strong> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
</tbody>
</table>
Related Topics

View Transactional Email Deliveries on page 1014

In the table on the All Deliveries page, you can show or hide transactional email deliveries.

View All The Contacts On A Segment

Contacts who meet the criteria you defined for your segment are automatically added to it.

The All Contacts page for a segment contains a table that allows you to view all of the contacts on a particular segment. You can use the search box to quickly locate specific contacts on the segment or sort the table by metrics and status. You can click on an email address to view more detailed information about them.

It is important to note how the use of criteria and rules can affect a contact's segment eligibility.

- When your segment's Match Type is Match All Rules (default): A contact must meet criteria in every rule in the segment in order to qualify. However, they only need to meet one of the criteria in each rule. So, if your segment has two rules and each of the rules has three criteria, they only need to meet one of the criteria from each rule.

- When your segment's Match Type is Match Any Rule: The contact must meet all of the criteria in a rule in order to qualify for the segment. If you have multiple rules, they must meet the all of the criteria in one of the rules in order to qualify for the segment. So, if your segment has two rules and each of the rules has three criteria, the contact only needs to meet all three criteria for one of the rules.

If your segment uses order data and the Match Type is Match Any Rule, a contact can only qualify for a segment when all of the criteria are met within a single order. But when your segment uses order data and the Match Type is Match All Rules, they can be added to a segment when they meet the criteria across multiple orders. This is because of how order data is analyzed. When an order must meet all of the criteria for a rule, as soon as the order does not meet a criteria the contact associated with the order is not included.

**Warning:** The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

**Note:** GeoIP data is based on the mode (the value that appears most often) of non-mobile IP addresses recorded for a contact. GeoIP data is not stored for mobile clients because it is deemed unreliable.

To view all the contacts on a segment:

1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click View Contacts.

### Default Columns

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The email address stored for the contact.</td>
<td>An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Status (Email)</td>
<td>The current status of the contact.</td>
<td>This indicates whether or not you can send marketing emails to them, and the level of engagement you have with them.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on each type of contact status, see Contact Status on page 1083.</td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>The date the contact was created.</td>
<td>This date lets you keep track of whether or not contacts are still engaged with you.</td>
</tr>
<tr>
<td>Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
<td></td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Message Format (Email)</td>
<td>The email message format preferred by the contact (HTML or Text).</td>
<td>It is important to know which type of email message your contacts prefer to receive, as this can affect the design of your email messages. For example, you wouldn't want to send an email message with a lot of images to a contact who prefers text only emails.</td>
</tr>
</tbody>
</table>

Hidden Columns

The table below describes columns which are not shown by default.

⚠️ Tip: For more information on showing additional columns, see Hide or Show Columns In A Table on page 1568.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on mobile numbers stored in your account. For more information on how to create segments based on mobile numbers, see Create A Segment Based On Contact Mobile Numbers on page 458.</td>
</tr>
<tr>
<td>API ID</td>
<td>The contact's API ID.</td>
<td>This information is useful if you are searching for a specific contact based on their API ID.</td>
</tr>
<tr>
<td>Facebook</td>
<td>Whether or not the contact's Facebook account is connected.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Twitter</td>
<td>Whether or not a Twitter handle is stored for the contact.</td>
<td>Storing a person's Twitter handle opens up the possibility for another channel of communication.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
<td>Tip: You can create segments based on the last date a delivery was sent to a contact. For more information on creating a segment based on the last date a delivery was sent to a contact, see Create A Segment Based On The Last Date A Delivery Was Sent To A Contact on page 477.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
<td>Tip: You can create segments based on the last date a click was recorded for a contact. For more information on creating a segment based on the last date a click was recorded for a contact, see Create A Segment Based On The Last Date A Click Was Recorded For A Contact on page 473.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
<td>Tip: You can create segments based on the last date an open was recorded for a contact. For more information on creating a segment based on the last date an open was recorded for a contact, see Create A Segment Based On The Last Date An Open Was Recorded For A Contact on page 475.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
</tr>
<tr>
<td>Last Unsubscribe Date</td>
<td>The last time the contact unsubscribed from receiving marketing emails from you. If the contact is still unsubscribed, the Status column will display Unsubscribed for that contact.</td>
<td>Tip: You can create a segment based on the last date a contact unsubscribed. For more information on creating a segment based on the last date a contact unsubscribed, see Create A Segment Based On The Last Date A Contact Unsubscribed on page 455.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <em>Configure Order Settings</em> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact. <strong>Tip:</strong> You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see <em>Create Segments Based On Contact RFM Metrics</em> on page 462.</td>
</tr>
<tr>
<td><strong>First Order Date</strong></td>
<td>The date of the first order recorded for the contact.</td>
<td>You can use the first order date to find out when a contact began placing orders with you. <strong>Tip:</strong> You can create segments based on the first order date stored for a contact. For more information on creating a segment based on the first order date recorded for a contact, see <em>Create Segments Based On Contact RFM Metrics</em> on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Order Date</td>
<td>The date of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order date to find out the last time a contact placed an order with you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last order date stored for a contact. For more information on creating a segment based on the last order date recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Last Order Total</td>
<td>The total amount of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order total to find out the revenue from the last order placed by the contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last order total stored for a contact. For more information on creating a segment based on the last order total recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The total number of orders recorded for the contact.</td>
<td>You can use the total orders number to find out how many orders a contact has placed with you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the total orders stored for a contact. For more information on creating a segment based on the total orders recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Average Order Value</td>
<td>The average order value recorded for the contact.</td>
<td>You can use the average order value metric to find out the average revenue for orders made by a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the average order value stored for a contact. For more information on creating a segment based on the average order value recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>GeoIP City</td>
<td>The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.</td>
<td>Knowing the city of your contacts allows you to send targeted marketing communications based on City.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see Create A Segment Based On What City Contacts Are Located In on page 479.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| GeoIP State/Region | The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields. | Knowing the State/Region of your contacts allows you to send targeted marketing communications based on State/Region.  
**Tip:** You can create segments based on GeoIP State/Region data stored in your account. For more information on how to create segments based on GeoIP State/Region data, see Create A Segment Based On What State Or Region Contacts Are Located In on page 482. |
| GeoIP Zip        | The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields. | Knowing the Postal/ZIP code of your contacts allows you to send targeted marketing communications based on Postal/ZIP code.  
**Tip:** You can create segments based on GeoIP Postal/ZIP code data stored in your account. For more information on how to create segments based on GeoIP Postal/ZIP code data, see Create A Segment Based On What Postal/ZIP Code Contacts Are Located In on page 481. |
| GeoIP Country    | The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields. | Knowing the country of your contacts allows you to send targeted marketing communications based on country.  
**Tip:** You can create segments based on GeoIP Country data stored in your account. For more information on how to create segments based on GeoIP Country data, see Create A Segment Based On What Country Contacts Are Located In on page 480. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>GeoIP Country Code</td>
<td>The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas.</td>
<td>Knowing the country code of your contacts allows you to send targeted marketing communications based on the country code stored for contacts in your account. <strong>Tip:</strong> You can create segments based on GeoIP Country Code data stored in your account. For more information on how to create segments based on GeoIP Country Code data, see Create A Segment Based On What Country Code Contacts Are Located In on page 479.</td>
</tr>
<tr>
<td>GeoIP Time Zone</td>
<td>The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.</td>
<td>Knowing the time zone of your contacts allows you to send targeted marketing communications based on the time zone stored for contacts in your account.</td>
</tr>
<tr>
<td>Primary Browser</td>
<td>The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.</td>
<td>Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails. <strong>Tip:</strong> You can create segments based on the primary browser data stored for contacts in your account. For more information on how to create segments based on primary browser data, see Create A Segment Based On The Browser Used By Contacts on page 487.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Mobile Browser       | The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact. | Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser.  
  **Tip:** You can create segments based on the mobile browser data stored for contacts in your account. For more information on how to create segments based on mobile browser data, see Create A Segment Based On The Mobile Browser Used By Contacts on page 488. |
| Primary Email Client | The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients. | Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client.  
  **Tip:** You can create segments based on the primary email client data stored for contacts in your account. For more information on how to create segments based on primary email client data, see Create A Segment Based On The Email Client Used By Contacts on page 488. |
| Mobile Email Client  | The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact. | Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client.  
  **Tip:** You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see Create A Segment Based On The Mobile Email Client Used By Contacts on page 489. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td>The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.)</td>
<td>Knowing a contact's operating system can allow you to target your messages based the type of operating system a contact is using.</td>
</tr>
</tbody>
</table>

**Tip:** You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see Create A Segment Based On The Operating System Used By Contacts on page 486.

---

**Related Topics**

- Technology Segment Criteria on page 486

**Related Topics**

- Create Segments Based On Contact RFM Metrics on page 462

The **RFM Metrics** criterion allows you to create segments based on RFM (Recency, Frequency, Monetary) metrics associated with contacts.

### Create A New Contact

To create a new contact from the Segment Overview page:

1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click Create New Contact.

### Export A Report Of Contacts On A Segment

To export a report of contacts on a segment:

1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click Export.
4. In the Choose Filter section, choose the filter to use for the export. You can choose:
   - All Contacts
   - Active Contacts
   - Inactive Contacts
   - Suppression List

   When you select All Contacts, only active and inactive contacts are included in the export. Suppression list contacts are not included.

5. In the Choose Fields section, select the field data you want included in the report.
6. In the Choose GeoIP / Technology Data section, select the GeoIP and technology usage data you want included in the report.

   For more information about GeoIP see Contact Details Location (GeoIP) Data on page 920. For more information about Technology Data see Contact Browser, Email Client, and OS Data on page 918.
7. In the Choose RFM Metrics section, select the RFM metrics you want included in the report.
For more information about RFM metrics see Contact Details RFM Metrics on page 917.

8. Optional: In the Email Notification section, add an email address that will be notified when the report is ready for download.

You are also notified when the report is ready for download via an in-application notification.

9. Click Export to begin generating the report.

   All reports will download into a CSV file that you can open in MS Excel.

**Fix Invalid Segments**

In some cases, a segment may become invalid. When this happens, an email will be sent to the address specified as the Emergency Contact Email Address and the segment will be marked as invalid on the All Segments page.

If a custom delivery group is selected in a segment and the delivery group contains more than deliveries, an error will be shown next to the segment's name on the All Segments page. You will not be able to get updated contact counts for the segment until the offending criterion is removed, or a delivery group with less than deliveries is selected. This error does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

If each criteria in a segment contains a custom delivery group with less than deliveries, but the segment as a whole contains more than deliveries, an error will be shown next to the segment's name on the All Segments page. You will not be able to get updated contact counts for the segment until the selected delivery groups in the segment are changed so that the segment contains less than deliveries. This error does not apply to the three default delivery groups (All Deliveries, Marketing Deliveries, and Transactional Deliveries).

For more information on adding an emergency contact email address, see Add An Emergency Contact Email Address on page 1330

To fix an invalid segment:

1. Go to Tables > Contacts > Segments.

2. Click on the name of an invalid segment.

   Invalid segments have the following text in red next to their name: **Invalid and needs to be fixed**.

   The criterion which invalidates the segment is highlighted red and includes information on why the criterion is invalid.

3. Based on the error, select new values in the criterion to fix the error.
Related Topics
Add An Emergency Contact Email Address on page 1330
The Emergency Contact Email Address section lets you specify an email address that will be notified when an email message is unable to be sent.

Delete A Segment
To delete a segment:
1. Go to Tables > Contacts > Segments.
2. Click on the checkbox in the row associated with the segment you want to delete.
3. Click Delete.

Copy Segments
At times, you may need to copy an existing segment.
Copying a segment does not change the total number of contacts in your account. It does not matter if a contact is on one segment or ten segments, they will only count once against your total contact allocation.
To copy a segment:
1. Go to Tables > Contacts > Segments.
2. Click the Copy icon in the row associated with segment you want to copy.
3. Provide a new name in the Name text box.
4. Click Copy.

Search For A Segment
Go to Tables > Contacts > Segments and use the search box to search through all the segments in your account.

Edit A Segment
To edit a segment:
1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click Edit.

Add The Current Contacts On A Segment To A List
To copy the current contacts on a segment to a list:
1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click Copy To List.
4. Add an internal list name in the Internal Name text box.
   The internal name that you assign to your list is only visible to users within your account.
5. Add an external list name in the External Name text box.
   The external name is the name that will appear to your contacts if you make this list visible on a webform.
6. Add a description in the Description text box.
   The description is only visible in your account. Your contacts will not be able to see the description.
7. Click Save.

View All The Contacts On A Segment
Contacts who meet the criteria you defined for your segment are automatically added to it.
The **All Contacts** page for a segment contains a table that allows you to view all of the contacts on a particular segment. You can use the search box to quickly locate specific contacts on the segment or sort the table by metrics and status. You can click on an email address to view more detailed information about them.

It is important to note how the use of criteria and rules can affect a contact's segment eligibility.

- **When your segment's Match Type is Match All Rules** (default): A contact must meet criteria in every rule in the segment in order to qualify. However, they only need to meet one of the criteria in each rule. So, if your segment has two rules and each of the rules has three criteria, they only need to meet one of the criteria from each rule.

- **When your segment's Match Type is Match Any Rule**: The contact must meet all of the criteria in a rule in order to qualify for the segment. If you have multiple rules, they must meet the all of the criteria in one of the rules in order to qualify for the segment. So, if your segment has two rules and each of the rules has three criteria, the contact only needs to meet all three criteria for one of the rules.

If your segment uses order data and the **Match Type** is **Match Any Rule**, a contact can only qualify for a segment when all of the criteria are met within a single order. But when your segment uses order data and the **Match Type** is **Match All Rules**, they can be added to a segment when they meet the criteria across multiple orders. This is because of how order data is analyzed. When an order must meet all of the criteria for a rule, as soon as the order does not meet a criteria the contact associated with the order is not included.

**Warning:** The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

**Note:** Geoloc data is based on the mode (the value that appears most often) of non-mobile IP addresses recorded for a contact. Geoloc data is not stored for mobile clients because it is deemed unreliable.

To view all the contacts on a segment:

1. Go to **Tables > Contacts > Segments**.
2. Click on the name of a segment.
3. Click View Contacts.

### Default Columns

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email</strong></td>
<td>The email address stored for the contact.</td>
<td>An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td><strong>Status (Email)</strong></td>
<td>The current status of the contact. <strong>Tip:</strong> For more information on each type of contact status, see Contact Status on page 1083.</td>
<td>This indicates whether or not you can send marketing emails to them, and the level of engagement you have with them.</td>
</tr>
<tr>
<td><strong>Created</strong></td>
<td>The date the contact was created.</td>
<td></td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
<td>This date lets you keep track of whether or not contacts are still engaged with you.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Message Format (Email)</td>
<td>The email message format preferred by the contact (HTML or Text).</td>
<td>It is important to know which type of email message your contacts prefer to receive, as this can affect the design of your email messages. For example, you wouldn't want to send an email message with a lot of images to a contact who prefers text only emails.</td>
</tr>
</tbody>
</table>
Hidden Columns

The table below describes columns which are not shown by default.

Tip: For more information on showing additional columns, see Hide or Show Columns In A Table on page 1568.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>API ID</td>
<td>The contact's API ID.</td>
<td>This information is useful if you are searching for a specific contact based on their API ID.</td>
</tr>
<tr>
<td>Facebook</td>
<td>Whether or not the contact's Facebook account is connected.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Twitter</td>
<td>Whether or not a Twitter handle is stored for the contact.</td>
<td>Storing a person's Twitter handle opens up the possibility for another channel of communication.</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
</tr>
</tbody>
</table>

Tip: You can create segments based on the last date a delivery was sent to a contact. For more information on creating a segment based on the last date a delivery was sent to a contact, see Create A Segment Based On The Last Date A Delivery Was Sent To A Contact on page 477.
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see <a href="#">Hide or Show Columns In A Table</a> on page 1568.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date a click was recorded for a contact. For more information on creating a segment based on the last date a click was recorded for a contact, see <a href="#">Create A Segment Based On The Last Date A Click Was Recorded For A Contact</a> on page 473.</td>
<td></td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see <a href="#">Hide or Show Columns In A Table</a> on page 1568.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date an open was recorded for a contact. For more information on creating a segment based on the last date an open was recorded for a contact, see <a href="#">Create A Segment Based On The Last Date An Open Was Recorded For A Contact</a> on page 475.</td>
<td></td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
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<tr>
<td>-----------------------</td>
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</tr>
<tr>
<td><strong>Last Unsubscribe Date</strong></td>
<td>The last time the contact unsubscribed from receiving marketing emails from you. If the contact is still unsubscribed, the Status column will display Unsubscribed for that contact.</td>
<td><strong>Tip:</strong> You can create a segment based on the last date a contact unsubscribed. For more information on creating a segment based on the last date a contact unsubscribed, see Create A Segment Based On The Last Date A Contact Unsubscribed on page 455.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact. <strong>Tip:</strong> You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
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<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>First Order Date</strong></td>
<td>The date of the first order recorded for the contact.</td>
<td>You can use the first order date to find out when a contact began placing orders with you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the first order date stored for a contact. For more</td>
</tr>
<tr>
<td></td>
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<td>information on creating a segment based on the first order date recorded for a contact, see</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td><strong>Last Order Date</strong></td>
<td>The date of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order date to find out the last time a contact placed an order with you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last order date stored for a contact. For more</td>
</tr>
<tr>
<td></td>
<td></td>
<td>information on creating a segment based on the last order date recorded for a contact, see</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td><strong>Last Order Total</strong></td>
<td>The total amount of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order total to find out the revenue from the last order placed by the contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last order total stored for a contact. For more</td>
</tr>
<tr>
<td></td>
<td></td>
<td>information on creating a segment based on the last order total recorded for a contact, see</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The total number of orders recorded for the contact.</td>
<td>You can use the total orders number to find out how many orders a contact has placed with you. Tip: You can create segments based on the total orders stored for a contact. For more information on creating a segment based on the total orders recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact. Tip: You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Average Order Value</td>
<td>The average order value recorded for the contact.</td>
<td>You can use the average order value metric to find out the average revenue for orders made by a contact. Tip: You can create segments based on the average order value stored for a contact. For more information on creating a segment based on the average order value recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **GeoIP City**  | The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields. | Knowing the city of your contacts allows you to send targeted marketing communications based on City.  
**Tip:** You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see [Create A Segment Based On What City Contacts Are Located In](#) on page 479. |
| **GeoIP State/Region** | The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields. | Knowing the State/Region of your contacts allows you to send targeted marketing communications based on State/Region.  
**Tip:** You can create segments based on GeoIP State/Region data stored in your account. For more information on how to create segments based on GeoIP State/Region data, see [Create A Segment Based On What State Or Region Contacts Are Located In](#) on page 482. |
| **GeoIP Zip**   | The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields. | Knowing the Postal/ZIP code of your contacts allows you to send targeted marketing communications based on Postal/ZIP code.  
**Tip:** You can create segments based on GeoIP Postal/ZIP code data stored in your account. For more information on how to create segments based on GeoIP Postal/ZIP code data, see [Create A Segment Based On What Postal/ZIP Code Contacts Are Located In](#) on page 481. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>GeoIP Country</td>
<td>The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields.</td>
<td>Knowing the country of your contacts allows you to send targeted marketing communications based on country. <strong>Tip:</strong> You can create segments based on GeoIP Country data stored in your account. For more information on how to create segments based on GeoIP Country data, see Create A Segment Based On What Country Contacts Are Located In on page 480.</td>
</tr>
<tr>
<td>GeoIP Country Code</td>
<td>The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas.</td>
<td>Knowing the country code of your contacts allows you to send targeted marketing communications based on the country code stored for contacts in your account. <strong>Tip:</strong> You can create segments based on GeoIP Country Code data stored in your account. For more information on how to create segments based on GeoIP Country Code data, see Create A Segment Based On What Country Code Contacts Are Located In on page 479.</td>
</tr>
<tr>
<td>GeoIP Time Zone</td>
<td>The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.</td>
<td>Knowing the time zone of your contacts allows you to send targeted marketing communications based on the time zone stored for contacts in your account.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Primary Browser</td>
<td>The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.</td>
<td>Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails.</td>
</tr>
<tr>
<td>Mobile Browser</td>
<td>The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact.</td>
<td>Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser.</td>
</tr>
<tr>
<td>Primary Email Client</td>
<td>The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients.</td>
<td>Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client.</td>
</tr>
</tbody>
</table>
### Mobile Email Client

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Email Client</td>
<td>The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact.</td>
<td>Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client. <strong>Tip:</strong> You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see Create A Segment Based On The Mobile Email Client Used By Contacts on page 489.</td>
</tr>
</tbody>
</table>

### Operating System

| Operating System     | The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.) | Knowing a contact's operating system can allow you to target your messages based the type of operating system a contact is using. **Tip:** You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see Create A Segment Based On The Operating System Used By Contacts on page 486. |

**Related Topics**

- Technology Segment Criteria on page 486
- Create Segments Based On Contact RFM Metrics on page 462

The RFM Metrics criterion allows you to create segments based on RFM (Recency, Frequency, Monetary) metrics associated with contacts.

**Search Contacts On A Segment**

When viewing all the contacts on a segment, you can use the search box to find specific contacts on the segment.

To search contacts on a segment:

1. Go to **Tables > Contacts > Segments.**
2. Click on the name of a segment.
3. Click **View Contacts**.
4. Using the **Email** pull-down menu, select how you want to search for contacts.
   You can search by email address, mobile number, email domain, or any field you have created in your account.

5. Only if you select to search by **Email** or **Mobile Number**: Use the **Exactly** pull-down menu to select how to optimize your search. Select either:
   - **Exactly** - This is the best option if you need to quickly find a contact and already know what their email address is.
   - **Starts with** - This is the best option if you know what a contact's email address starts with, but aren't sure of the ending or the domain used. You can also use this option to perform grouped searches (e.g. I want all contacts whose email address starts with j).
   - **Contains** - This is the best option if you only know part of the email address or need to do a group search. For example, you could search for all email addresses that contain `gmail.com`.

6. Click **Search**.
   The contacts that match your search criteria are displayed.

**Sort By Active And Inactive Contacts On A Segment**

To sort by active and inactive contacts on a segment:

1. Go to **Tables > Contacts > Segments**.
2. Click on the name of a segment.
3. Click **View Contacts**.

4. Sort the table by clicking the **Active**, **Inactive** or **All** tabs.

**Unsubscribe Contacts**

When you unsubscribe a contact, they are given a status of Unsubscribed.

To unsubscribe a contact:

1. Go to **Tables > Contacts > Segments**.
2. Click on the name of a segment.
3. Click **View Contacts**.
4. Click the checkbox next to the email address of the contact you want to unsubscribe.
5. Click Unsubscribe.

**Add Segment Contacts To A List**

To add contacts to a list:

1. Go to **Tables > Contacts > Segments**.
2. Click on the name of a segment.
3. Click **View Contacts**.
4. Click the checkbox next to the email address of the contact(s) you want to add to a list.
5. Click **Add To List**.

**Create A New Contact**

For more information on creating contacts, see [Create An Individual Contact](#) on page 1101.

To create a new contact:

1. Go to **Tables > Contacts > Segments**.
2. Click on the name of a segment.
3. Click **View Contacts**.
4. Click **Create New Contact**.

**Export Data For Contacts On A Specific Segment**

When viewing all the contact on a segment, you can use the Export link to export a report containing metrics for all the contacts on the segment.
To export a report for contacts on a segment:

1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click View Contacts.

4. Click Export.
5. In the Choose Filter section, choose the filter to use for the export. You can choose:
   - All Contacts
   - Active Contacts
   - Inactive Contacts
   - Suppression List

   When you select All Contacts, only active and inactive contacts are included in the export. Suppression list contacts are not included.

6. In the Choose Fields section, select the field data you want included in the report.
7. In the Choose GeoIP / Technology Data section, select the GeoIP and technology usage data you want included in the report.

   For more information about GeoIP see Contact Details Location (GeoIP) Data on page 920. For more information about Technology Data see Contact Browser, Email Client, and OS Data on page 918.

8. In the Choose RFM Metrics section, select the RFM metrics you want included in the report.

   For more information about RFM metrics see Contact Details RFM Metrics on page 917.

9. Optional: In the Email Notification section, add an email address that will be notified when the report is ready for download.

   You are also notified when the report is ready for download via an in-application notification.

10. Click Export to begin generating the report.

    All reports will download into a CSV file that you can open in MS Excel.

    **Note:** All reports will download into a CSV file that you can open in MS Excel.

    **Tip:** You can directly import an export report back into the application without having to make any modifications to the export report. For more information on importing a .CSV file, see Contact Imports on page 1080.

**Edit A Segment**

To edit a segment:

1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click View Contacts.
4. Click Edit.

Add The Current Contacts On A Segment To A List

To copy the current contacts on a segment to a list:

1. Go to Tables > Contacts > Segments.
2. Click on the name of a segment.
3. Click View Contacts.
4. Click Copy To List.
5. Add an internal list name in the **Internal Name** text box.
   The internal name that you assign to your list is only visible to users within your account.
6. Add an external list name in the **External Name** text box.
   The external name is the name that will appear to your contacts if you make this list visible on a webform.
7. Add a description in the **Description** text box.
   The description is only visible in your account. Your contacts will not be able to see the description.
8. Click Save.

Archive A Segment

You can clean up your list of segments without deleting them by archiving unused segments.

Archiving segments allows to unclutter the segments list in the rest of the platform. Sometimes you don't want to lose the criteria of a particular segment that you're only running one time, but you still want to hide them from the segments lists. This can be especially helpful when it comes to selecting a segment when you are scheduling a delivery or setting up a workflow.

When you archive a segment, it is removed from the list of segments and it stops being updated. It is also removed from the list of segments in workflows and deliveries. If you try to archive a segment that is tied to a workflow or delivery, you will get an error message. You also need to make sure that the segment you are archiving is not tied to an API or to any dynamic content in a message.

To archive a segment:

1. Go to Tables > Contacts > Segments.
2. Select the segment or segments you want to archive.
3. Click the **Archive** button.
Note: After you archive a segment, you cannot perform certain actions, including:

- viewing the contact membership
- creating a list from the contacts that are on that segment
- viewing the count of the contacts on that archived segment

View Archived Segments
You can see your segments even after you have archived them.

To view your archived segments:

1. Go to Tables > Contacts > Segments.
2. Check the box for Display Archived Segments.
   Archived segments will have Archived as a Status and N/A for Active Contacts.
3. Optional: Click on the name of a segment you want to view.
   The Segment Details page opens and shows the date it was archived.
4. Optional: You can click Edit on an archived segment, and then click Calculate. You are able to calculate contacts on an archived segment.
   Calculating will not unarchive the segment.

Unarchive A Segment
If you decide you want to use a segment that you have previously archived, you can unarchive it.

To unarchive a segment:

1. Go to Tables > Contacts > Segments.
2. Make sure the Display Archived Segments checkbox is checked.
3. Click the segment that you want to unarchive.
   The Segment Details page opens.
4. Click Edit.
5. Review the segment and ensure that the criteria are still relevant.
6. To
   - Unarchive the segment, click Save and Unarchive.
   - Create a copy of the segment, click Save As. Clicking Save As will leave the segment archived, but the new segment will be active.

Lists
Lists are static groups of contacts that are great for high-level organization of your contacts. You will want to think about multiple lists for different departments, different goals, etc. You might even break out your audience into opted-in and not yet opted-in lists.

Contacts are placed onto a list by you and can only be removed if you manually remove them, or if they unsubscribe from your emails. The All Lists page lets you see all of the lists that you have created in your account. From this page, you can begin creating new lists, or manage existing lists.
On this page you can see the internal name for the list, the external name that customers will see if you use the list in a webform, the number of active contacts you have in a list, and when the details for the list were last updated.

The Active Contacts number is updated nightly, not in real time. So when you clean a list, unsubscribe contacts on the list, add or remove an individual contact using the platform interface or API, or use workflows to manage list membership you will not see the Active Contacts number change until the next nightly list count update. Even though the Active Contacts numbers do not change, the changes to the list have been applied. There are a handful of events that will cause an immediate update to the Active Contacts number:

- Contact imports where the contacts are added to a list.
- Copying a segment to a list.
- Merging lists together. This only updates the Active Contacts for the merged list.
- Splitting a list. This updates the Active Contacts for both of the lists that resulted from the split.
- Direct import to a list.

This is also true for anywhere else in the platform you see a number of contacts associated with a list. It is also important to note, the Last Updated date reflects when one of the details for a list - Internal Name, External Name, or Active Contacts - was last updated. So, if you add contacts to a list but this does not trigger the Active Contacts number to increment, the Last Updated date will also not change until the Active Contacts number increases during the next nightly calculation.

### Create A List

**Warning:** The internal list name cannot contain double quotes, less than signs, or greater than signs.

To create a list:

1. Go to **Tables > Contacts > Lists**.
2. Click **Create New List**.
3. Add an internal list name in the **Internal Name** text box.
   - The internal name that you assign to your list is only visible to users within your account.
4. Add an external list name in the **External Name** text box.
   - The external name is the name that will appear to your contacts if you make this list visible on a webform.
5. Add a description in the **Description** text box.
   The description is only visible in your account. Your contacts will not be able to see the description.
6. Click **Save**.

**Related Topics**

**Video: Create Lists**

**Edit A List**

To edit a list:

1. Click the Pencil icon in the row associated with the list you want to edit on the **All Lists** page.
2. From here, you can edit the Internal Name, External Name, and Description for your list.
3. When you are done making changes to your list, click **Save**.

**Delete A List**

There are two ways to delete a list:

- You can delete a list so that the list no longer exists but all of the contacts on the list remain in your account.
- You can delete a list and all of the contacts on the list. When you delete the contacts on a list, they are permanently removed from your account.

If you want to delete the contacts on the list from your account when you delete the list, see **Delete A List And The Contacts On It** on page 535 instead of this task.

To delete a list without removing contacts from your account:

1. Go to **Tables > Contacts > Lists**
2. Click the checkbox in the row associated with the list you want to delete.
3. Click **Delete**
   A confirmation box is displayed.
4. Click **Delete** in the confirmation box to delete the list.

**Delete A List And The Contacts On It**

There are two ways to delete a list:

- You can delete a list so that the list no longer exists but all of the contacts on the list remain in your account.
- You can delete a list and all of the contacts on the list. When you delete the contacts on a list, they are permanently removed from your account.

This task explains how to delete a list and all of the contacts associated with that list. If you do not want to delete the contacts on the list from your account, see **Delete A List** on page 535 instead of this task.

**Warning:** Exercise caution when you delete a list and its contacts. Once contacts are deleted, you cannot recover them. Instead, you will have to add them to your account again, as if they are new contacts.

To delete a list and all the contacts associated with it:

1. Go to **Tables > Contacts > Lists**
2. Click the **Delete List and Associated Contacts** icon in the row associated with the list you want to delete.
   A delete confirmation window is displayed.
3. Type delete in the **Please type DELETE in the box to confirm** box.
4. Click the **Delete List AND Contacts** button.

**Copy Lists**
Copying a list or segment does not change the total number of contacts in your account. Whether a contact is on 1 list or 10 lists, they will only count once against your total.

To copy a list:

1. Click the Copy List icon in the row associated with the list you want to copy on the All Lists page.
2. Provide a new internal name.
   The internal name is only visible within your account.
3. Provide an external name.
   The external name is the name that will appear to your contacts if you make this list visible on a webform.
4. Click Save.

Search For A List

You can use the Search Lists feature to quickly search for a specific list. All you need to do is type in the name of the list you want to find, and then click Search.

Merge Lists And Segments Convert A Segment To A List

Merging lists and/or segments together allows you to create a new list that is a combination of the lists or segments you merged together.

When you merge a list, the number of contacts shown for the merged list will not always reflect the number of active contacts shown on the lists or segments that were merged. Bronto calculates the number of contacts on a list nightly, instead of when the action occurs, to help enhance the performance of the platform. So the lists that you are merging will not show any changes to list membership that occurred since the last nightly update. However, because the merged list is new it will show the combined number of active contacts from both lists at the time the new list was created. If you are concerned, you can use the list's overview page to view the contacts on the merged list in order to confirm the lists were merged correctly. Also, the number of active contacts shown on the new merged list will be updated during the next nightly list count update.

The page for merging lists and merging segments is the same. The instructions for merging lists or segments are described below.

To merge:

To convert a segment

1. Go to Tables > Contacts > Lists or Tables > Contacts > Segments.
2. Click Merge Lists/Segments.
Merge Lists and/or Segments

Merging allows you to combine multiple lists and/or segments into a new, single list. Please note that merging or overwriting the original lists or segments.

1. Select Lists and Segments

<table>
<thead>
<tr>
<th>Lists</th>
<th>Segments</th>
</tr>
</thead>
</table>

Search your Lists (Clear)

Select all

Example List (1)

Selected Lists:

Example List (1)

Selected Segments:

No segments selected.

2. Select or Create a List to Merge Into

- Create new list
- Merge into an existing list

Please enter a new list name:

Internal Name*

External Name*
3. In the **Select Lists and Segments** section, select the lists and/or segments segment you wish to merge convert.

   Note: This will not delete or overwrite the original lists or segments. If you want to create a list from the current contents of a segment, you can just select the segment you want converted and enter the new list name. You do not need to select multiple segments or lists to make use of the merge feature.

4. In the **Select or Create a List to Merge Into** section, select whether you want to create a new list, or merge the contacts into an existing list.

5. If you selected Select **Create new list**:
   a) Add an internal name for your new list in the **Internal Name** text box. The internal name is only visible within your account.
   b) Add an external name for your new list in the **External Name** text box. The external name is the name that will appear to your contacts if you make this list visible on a Webform.

6. If you selected **Merge into an existing list**, select the list you want to merge the contacts into.

7. Click **Merge**.

**Split A List**

Splitting a list allows you to take an existing list and split it into smaller chunks (split groups). For example, you could take a list of 100k contacts and split into three sub-lists each containing a percentage of the original list (ListA: 50%, ListB 25%, and ListC 25%). Contacts from the original list will be randomly distributed onto the split groups.

You can split a list into 5 separate lists (splits), each with it's own random group of contacts from the original list.

To split a list:

1. Go to **Tables > Contacts > Lists**.
2. Click on the name of the list you want to split.
3. Click **Split**.
4. Optional: Change the internal list name if needed.

   By default, the Internal Name text box is pre-populated with the internal name of the original list. Any subsequent list splits will use the internal name specified here. For example, **My List - Split A**, where **My List** is the internal name.
Changing the internal name on the list split page does not change the internal name assigned to the original list when it was created.

5. Optional: Click in the Name text box for each list split group and change its name.
   This text will appear after the internal name used for the list split. For example, if you had the internal name Example List, and changed the Group A split name to Split Number One, the Group A split would show up (in tables, list pickers, etc.) as Example List - Split Number One

6. Assign percentages for each list split group.
   You can split the original list up to five times. If you would like the list to be split into fewer than 5 groups, leave those percentage values at zero.

   Note: The list split percentages must add up to 100%. You can view the total split percentage on the right side of the page.

7. Click Split.

List Labels
List labels can be used to organize and visually group lists.

Labels allow you to group objects in the platform together in order to sort and compare related data. After a label is created you have the option of color coding the label so that you can use label colors to quickly identify related lists. You can also filter lists using labels and label colors.

<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a new label to a list</td>
<td>1. Click the Add/Remove Labels icon in the row associated with a list.</td>
</tr>
<tr>
<td></td>
<td>2. On the Add labels tab, click the Add new radio button.</td>
</tr>
<tr>
<td></td>
<td>3. Add a name for the label in the text box.</td>
</tr>
<tr>
<td></td>
<td>4. Click Add Label.</td>
</tr>
<tr>
<td></td>
<td>5. Click Save Changes.</td>
</tr>
<tr>
<td></td>
<td>The new label is immediately created and applied to the list.</td>
</tr>
</tbody>
</table>

Add an existing label to a list

1. Click the Add/Remove Labels icon in the row associated with a list.
2. On the Add labels tab, click the Select from existing radio button.
3. Click the checkbox next to the labels you want to add to the list.
4. Click Add Label.
5. Click Save Changes.
The new label is immediately created and applied to the list.

Change the color of a list label

1. Click on the label in the lists grid.
2. Click the color you want the list label to be.
3. Click Save Changes.
<table>
<thead>
<tr>
<th>To</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove a label from a list</td>
<td>This only removes the label from this list. The label will maintain its association with any other lists it is currently associated with.</td>
</tr>
<tr>
<td></td>
<td>1. Click the <strong>Add/Remove Labels</strong> icon in the row associated with a list.</td>
</tr>
<tr>
<td></td>
<td>2. Click the <strong>Remove existing labels</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>3. Click the X for the labels you want to remove.</td>
</tr>
<tr>
<td></td>
<td>4. Click <strong>Save Changes</strong>.</td>
</tr>
<tr>
<td>Edit the name of a list label</td>
<td>If this label is used on multiple lists, all instances of this label are updated to the new name.</td>
</tr>
<tr>
<td></td>
<td>1. Click on the label in the lists grid.</td>
</tr>
<tr>
<td></td>
<td>2. Type the new name where the current label name is.</td>
</tr>
<tr>
<td></td>
<td>3. Click <strong>Save Changes</strong>.</td>
</tr>
<tr>
<td>Delete a list label</td>
<td>This deletes all instances of the list label.</td>
</tr>
<tr>
<td></td>
<td>1. Click on the label in the lists grid.</td>
</tr>
<tr>
<td></td>
<td>2. Select the <strong>Delete this label?</strong> box.</td>
</tr>
<tr>
<td></td>
<td>3. Click <strong>Save Changes</strong>.</td>
</tr>
<tr>
<td>Filter the lists grid by label</td>
<td>Above the lists grid are two label-based filter options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Filter By Label</strong> list to filter the grid by a specific label.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Filter By Label Color</strong> list to filter the grid by a specific label color.</td>
</tr>
</tbody>
</table>

**List Overview Page**

When you click on an individual list name, the overview page for that list is displayed. From the List Overview page, you can view all the metrics for that list and perform various actions on that list.

The Lists Overview page is divided into two tabs; the Overview and Deliveries tab and the Contacts tab. The Contacts tab links will take you to the Search Contacts page, which provides information about all of the contacts on the list. For information on the Overview and Deliveries tab, see below.

**List General Information**

In the basic information section, you can see the following information about a list:
• **External Name** - The external name is the name that will appear to your contacts if you make this list visible on a webform.

• **Description** - Displays the description provided when the list was created.

• **Created** - Displays the date the list was created.

• **Last Modified** - Displays the last time the list was modified. A list is modified when a contact move on/off the list, or when you change some information about the list (name, description, etc.)

• **Permissions** - Displays the modifications you can make to the list. How you can modify a list depends on your user permissions.

For more information on list level user permissions, see *Allow A User To Create, Edit, View, And Deliver To Lists* on page 1340.

• **Last Delivery Sent To This List** - Displays metrics and information for the last email delivery sent to the list. You can see the following metrics about the delivery:
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
</tbody>
</table>

**Tip:** Click the message name to view a delivery report for the delivery. For more information on delivery reports, see [Delivery Reports (Legacy)](page 684) on page 684.

- **Usage** - Displays the number of deliveries that have been scheduled to send to this list in the last 30 days.
- **Contact Statistics And Sources** - Displays the number of active contacts on the list and how the contacts were added to the list.

**Tip:** Contacts with a status of Active are contacts that can receive emails from you.

Contacts can be added:
- Manually
- From bulk import
  - For more information on importing contacts, see [Contact Imports](page 1080) on page 1080.
- Via the API
  - For more information on adding contacts via the API, see the documentation for `addContacts`, `addOrUpdateContacts`, and `addToList`.
- From a webform (includes contact added using direct add)
  - For more information on adding contacts via a webform, see [Webforms](page 1091).
- From Salesforce imports
  - For more information on importing contacts from Salesforce, see [Import A Salesforce Report](page 1091) on page 1091.

**Tip:** The list ID can be obtained from the footer in the bottom right corner of the page. You will need the list ID when using the Direct Add feature. For more information on Direct Add, see [Direct Add](page 1102) on page 1102.

**Related Topics**
- [Allow A User To Create, Edit, View, And Deliver To Lists](page 1340)
- [Import A Salesforce Report](page 1091)

**List Monthly Growth**
The Growth Over the Past Month Graph lets you see how your list has grown over the past month.

This graph is only updated on the 1st of every month. (For example, June 1, etc.)
**List Average Performance**

In the Average Performance section, you can see the following metrics:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Delivery Rate</strong></td>
<td>The average delivery rate represents an average of the individual delivery rates for each delivery sent to a list or segment.</td>
<td>The average delivery rate is important because it gives you an indication on the relative health of the list or segment. If the average delivery rate is low, then contacts on the list or segment are not receiving emails you send them.</td>
</tr>
<tr>
<td><strong>Average Open Rate</strong></td>
<td>The average open rate represents an average of the individual open rates for each delivery sent to a list or segment.</td>
<td>The average open rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. The average open rate lets you see out of all the contacts on the list or segment who received the email you sent, who actually took the time to open it.</td>
</tr>
<tr>
<td><strong>Average Click Rate</strong></td>
<td>The average click rate represents an average of the individual click rates for each delivery sent to the list or segment.</td>
<td>The average click rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. The average click rate gives you an indication of how effective the emails you sent to the list or segment were at getting the contacts who opened the emails to click the links contained therein.</td>
</tr>
</tbody>
</table>
### Related Topics

**Sender and Delivery Rating** on page 309
Your sender rating and email delivery ratings provide quantitative insight into the quality of your lists and emails and can be affected by email complaints.

**List Email Addresses By Domain**
The Email Addresses by Domain chart provides you with a visual representation of the domains being used by the contacts on the list you are viewing.

![Image of email addresses by domain]

**List Overall Delivery Performance**
The Overall performance for deliveries table lets you see the metrics associated with the specific deliveries of messages that have been sent to this list. In this table, you can see the open, click, and convert percentages for a given delivery. You can also generate a report based on specific delivery by clicking 📊.

![Image of overall delivery performance table]

**Note:** For messages with a type of "Split", the metrics displayed in the table represent the data for the entire split test and are not limited to the specific list or segment you are viewing. For more information about split lists see **List Splitting**.

**View All The Contacts On A List**
The **All Contacts** page for a list contains a table that allows you to view all of the contacts on a particular list. You can use the search box to quickly locate specific contacts on the list or sort the table by metrics and status. You can click on a contact's email address to view more detailed information them.

**Warning:** The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see **Data Retention Policy** on page 1509.
**Note:** GeoIP data is based on the mode (the value that appears most often) of non-mobile IP addresses recorded for a contact. GeoIP data is not stored for mobile clients because it is deemed unreliable.

To view all the contacts on a list:

1. Go to **Tables > Contacts > Lists**.
2. Click on the name of a list.
3. Click **View Contacts**.

Default Columns

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The email address stored for the contact.</td>
<td>An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Status (Email)</td>
<td>The current status of the contact.</td>
<td>This indicates whether or not you can send marketing emails to them, and the level of engagement you have with them.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on each type of contact status, see <strong>Contact Status</strong> on page 1083.</td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>The date the contact was created.</td>
<td></td>
</tr>
<tr>
<td>Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
<td>This date lets you keep track of whether or not contacts are still engaged with you.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Message Format (Email)</strong></td>
<td>The email message format preferred by the contact (HTML or Text).</td>
<td>It is important to know which type of email message your contacts prefer to receive, as this can affect the design of your email messages. For example, you wouldn't want to send an email message with a lot of images to a contact who prefers text only emails.</td>
</tr>
</tbody>
</table>

**Hidden Columns**

The table below describes columns which are not shown by default.
**Tip:** For more information on showing additional columns, see Hide or Show Columns In A Table on page 1568.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on mobile numbers stored in your account. For more information on how to create segments based on mobile numbers, see Create A Segment Based On Contact Mobile Numbers on page 458.</td>
</tr>
<tr>
<td>API ID</td>
<td>The contact's API ID.</td>
<td>This information is useful if you are searching for a specific contact based on their API ID.</td>
</tr>
<tr>
<td>Facebook</td>
<td>Whether or not the contact's Facebook account is connected.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Twitter</td>
<td>Whether or not a Twitter handle is stored for the contact.</td>
<td>Storing a person's Twitter handle opens up the possibility for another channel of communication.</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date a delivery was sent to a contact. For more information on creating a segment based on the last date a delivery was sent to a contact, see Create A Segment Based On The Last Date A Delivery Was Sent To A Contact on page 477.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date a click was recorded for a contact. For more information on creating a segment based on the last date a click was recorded for a contact, see Create A Segment Based On The Last Date A Click Was Recorded For A Contact on page 473.</td>
<td></td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date an open was recorded for a contact. For more information on creating a segment based on the last date an open was recorded for a contact, see Create A Segment Based On The Last Date An Open Was Recorded For A Contact on page 475.</td>
<td></td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Unsubscribe Date</td>
<td>The last time the contact unsubscribed from receiving marketing emails from you. If the contact is still unsubscribed, the Status column will display Unsubscribed for that contact.</td>
<td>Tip: You can create a segment based on the last date a contact unsubscribed. For more information on creating a segment based on the last date a contact unsubscribed, see Create A Segment Based On The Last Date A Contact Unsubscribed on page 455.</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The total amount of revenue recorded for the contact.</td>
<td>Tip: You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>First Order Date</td>
<td>The date of the first order recorded for the contact.</td>
<td>You can use the first order date to find out when a contact began placing orders with you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tip: You can create segments based on the first order date stored for a contact. For more information on creating a segment based on the first order date recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>Last Order Date</td>
<td>The date of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order date to find out the last time a contact placed an order with you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tip: You can create segments based on the last order date stored for a contact. For more information on creating a segment based on the last order date recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>Last Order Total</td>
<td>The total amount of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order total to find out the revenue from the last order placed by the contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tip: You can create segments based on the last order total stored for a contact. For more information on creating a segment based on the last order total recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Total Orders** | The total number of orders recorded for the contact.                        | You can use the total orders number to find out how many orders a contact has placed with you.  
    **Tip:** You can create segments based on the total orders stored for a contact. For more information on creating a segment based on the total orders recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462. |
| **Total Revenue** | The total amount of revenue recorded for the contact.                       | You can use the total revenue metric to find out how much revenue has been recorded for a contact.  
    **Tip:** You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462. |
| **Average Order Value** | The average order value recorded for the contact.                          | You can use the average order value metric to find out the average revenue for orders made by a contact.  
    **Tip:** You can create segments based on the average order value stored for a contact. For more information on creating a segment based on the average order value recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>GeoIP City</td>
<td>The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.</td>
<td>Knowing the city of your contacts allows you to send targeted marketing communications based on City.</td>
</tr>
<tr>
<td></td>
<td>Tip: You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see Create A Segment Based On What City Contacts Are Located In on page 479.</td>
<td></td>
</tr>
<tr>
<td>GeoIP State/Region</td>
<td>The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields.</td>
<td>Knowing the State/Region of your contacts allows you to send targeted marketing communications based on State/Region.</td>
</tr>
<tr>
<td></td>
<td>Tip: You can create segments based on GeoIP State/Region data stored in your account. For more information on how to create segments based on GeoIP State/Region data, see Create A Segment Based On What State Or Region Contacts Are Located In on page 482.</td>
<td></td>
</tr>
<tr>
<td>GeoIP Zip</td>
<td>The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields.</td>
<td>Knowing the Postal/ZIP code of your contacts allows you to send targeted marketing communications based on Postal/ZIP code.</td>
</tr>
<tr>
<td></td>
<td>Tip: You can create segments based on GeoIP Postal/ZIP code data stored in your account. For more information on how to create segments based on GeoIP Postal/ZIP code data, see Create A Segment Based On What Postal/ZIP Code Contacts Are Located In on page 481.</td>
<td></td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| GeoIP Country    | The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields. | Knowing the country of your contacts allows you to send targeted marketing communications based on country.  
|                  |                                                                                                                                                                                                             |                                                                                                                                             | You can create segments based on GeoIP Country data stored in your account. For more information on how to create segments based on GeoIP Country data, see Create A Segment Based On What Country Contacts Are Located In on page 480. |
| GeoIP Country Code| The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas. | Knowing the country code of your contacts allows you to send targeted marketing communications based on the country code stored for contacts in your account.  
<p>|                  |                                                                                                                                                                                                             |                                                                                                                                             | You can create segments based on GeoIP Country Code data stored in your account. For more information on how to create segments based on GeoIP Country Code data, see Create A Segment Based On What Country Code Contacts Are Located In on page 479. |
| GeoIP Time Zone  | The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click. | Knowing the time zone of your contacts allows you to send targeted marketing communications based on the time zone stored for contacts in your account. |                                                                                         |</p>
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary Browser</strong></td>
<td>The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.</td>
<td>Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails. <strong>Tip:</strong> You can create segments based on the primary browser data stored for contacts in your account. For more information on how to create segments based on primary browser data, see Create A Segment Based On The Browser Used By Contacts on page 487.</td>
</tr>
<tr>
<td><strong>Mobile Browser</strong></td>
<td>The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact.</td>
<td>Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser. <strong>Tip:</strong> You can create segments based on the mobile browser data stored for contacts in your account. For more information on how to create segments based on mobile browser data, see Create A Segment Based On The Mobile Browser Used By Contacts on page 488.</td>
</tr>
<tr>
<td><strong>Primary Email Client</strong></td>
<td>The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients.</td>
<td>Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client. <strong>Tip:</strong> You can create segments based on the primary email client data stored for contacts in your account. For more information on how to create segments based on primary email client data, see Create A Segment Based On The Email Client Used By Contacts on page 488.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Mobile Email Client       | The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact. | Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client.  
**Tip:** You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see Create A Segment Based On The Mobile Email Client Used By Contacts on page 489. |
| Operating System          | The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.) | Knowing a contact's operating system can allow you to target your messages based on the type of operating system a contact is using.  
**Tip:** You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see Create A Segment Based On The Operating System Used By Contacts on page 486. |

**Sort By Active And Inactive Contacts On A List**
When viewing the contacts on a list, you can sort the table by clicking the Active, Inactive and All tabs.

**Unsubscribe Contacts**
When viewing all the contacts on a list, you can click Unsubscribe to unsubscribe contacts.

**Add Contacts To Another List**
When viewing all the contacts on a list, you can click Add To List to add a single contact or multiple contacts to an existing list or a new list.

**Remove A Contact From A List On The All Contacts Page**
When viewing all the contacts on a list, you can click Remove From List to remove a single contact or multiple contacts from the list you are viewing.

**Export Data For Contacts On A Specific List**
Organize

When viewing all the contacts on a list, you can use the Export link to export a report containing metrics for all the contacts on the list.

Tip: You can directly import an export report back into the application without having to make any modifications to the export report. For more information on importing a .CSV file, see Contact Imports on page 1080.

To export a report for contacts on a list:

1. Go to Tables > Contacts > Lists.
2. Click on the name of a list.
3. Click View Contacts.
4. Click Export.
5. In the Choose Filter section, choose the filter to use for the export. You can choose:
   - All Contacts
   - Active Contacts
   - Inactive Contacts
   - Suppression List
   
   When you select All Contacts, only active and inactive contacts are included in the export. Suppression list contacts are not included.
6. In the Choose Fields section, select the field data you want included in the report.
7. In the Choose GeoIP / Technology Data section, select the GeoIP and technology usage data you want included in the report.
   
   For more information about GeoIP see Contact Details Location (GeoIP) Data on page 920. For more information about Technology Data see Contact Browser, Email Client, and OS Data on page 918.
8. In the Choose RFM Metrics section, select the RFM metrics you want included in the report.
   
   For more information about RFM metrics see Contact Details RFM Metrics on page 917.
9. Optional: In the Email Notification section, add an email address that will be notified when the report is ready for download.
   
   You are also notified when the report is ready for download via an in-application notification.
10. Click Export to begin generating the report.

All reports will download into a CSV file that you can open in MS Excel.

Note: All reports will download into a CSV file that you can open in MS Excel.

Create A New Contact

When viewing the contacts on a list, you can create a new contact by clicking Create New Contact.

Tip: For more information on creating contacts, see Create An Individual Contact on page 1101.

Related Topics
Create An Individual Contact on page 1101
The Add/Edit Contact page lets you create a new contact, or edit an existing contact.

Search The Contacts On A List

When viewing all the contacts on a list, you can use the search box to find specific contacts on the list.
To search contacts on a list:

1. Go to Tables > Contacts > Lists.
2. Click on the name of a list.
3. Click View Contacts.
4. Using the Email pull-down menu, select how you want to search for contacts.
   You can search by email address, mobile number, email domain, or any field you have created in your account.
5. Only if you select to search by Email or Mobile Number: Use the Exactly pull-down menu to select how to optimize your search. Select either:
   • Exactly - This is the best option if you need to quickly find a contact and already know what their email address is.
   • Starts with - This is the best option if you know what a contact's email address starts with, but aren't sure of the ending or the domain used. You can also use this option to perform grouped searches (e.g. I want all contacts whose email address starts with j).
   • Contains - This is the best option if you only know part of the email address or need to do a group search. For example, you could search for all email addresses that contain gmail.com.
6. Click Search.
   The contacts that match your search criteria are displayed.

Contact Fields

Contact fields are data containers that you can use to save information about your contacts.

Contacts are more than just email addresses. Fields allow you to store additional information about your contacts - first name, postal code, age, etc. You can also use fields to personalize your messages and segment your lists. It's important to note that any field used in a message must be smaller than 1 MB in size.

The All Fields page lets you see all of the fields that you have added to your account. From this page, you can begin creating new fields or managing existing fields.

![Fields](image)

**Warning:** You should not use fields to store particularly sensitive or private information about your contacts. Information such as credit card numbers, social security numbers, unencrypted passwords, and other similar data should be stored outside of the application in a system specifically designed for handling this type of data.

Fields cannot be deleted if the field is being used in an active workflow.

**Related Topics**

- Edit The Field Labels In Webforms on page 222
- Contact Imports on page 1080
The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

Search For Contacts In Your Account on page 896
Clean Contacts on page 1399

Related Topics
Video: Create Fields

Related Topics
Contact Status on page 1083

Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Contact Field Types

A field's type indicates the type of data that can be stored in the field. When creating a custom field, you select the type. The type selected for a field should depend on the type of data you plan on storing in the field.

Depending on the type selected for a field, contacts will be able to populate fields (via a webform) with data using an input that correlates to the type of data being stored in a field (free form text box, pull-down menu, checkbox, radio buttons, etc). For more information on using fields with webforms, see Edit The Field Labels In Webforms on page 222.

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Data Allowed</th>
<th>Webform Display Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Any combination of letters and numbers. Maximum character limit: 65535</td>
<td>A basic text box.</td>
</tr>
<tr>
<td>Text Area</td>
<td>Any combination of letters and numbers. Maximum character limit: 65535</td>
<td>A large multi-line text box.</td>
</tr>
<tr>
<td>Password</td>
<td>Any combination of letters and numbers. Maximum character limit: 65535</td>
<td>Similar to the Text field type, but it hides typed characters.</td>
</tr>
<tr>
<td>Checkbox</td>
<td>A boolean value of true (checked) or false (unchecked).</td>
<td>Displays checkboxes.</td>
</tr>
<tr>
<td>Radio Button</td>
<td>The string stored in the value attribute.</td>
<td>Displays radio buttons.</td>
</tr>
<tr>
<td>Pull-down menu</td>
<td>The string stored in the value attribute for an option used in the pull-down menu (select).</td>
<td>Displays a pull-down menu (select) containing the specified values.</td>
</tr>
<tr>
<td>Field Type</td>
<td>Data Allowed</td>
<td>Webform Display Type</td>
</tr>
<tr>
<td>------------</td>
<td>--------------</td>
<td>----------------------</td>
</tr>
</tbody>
</table>
| **Number** | Any 10 digit whole number less than or equal to 2147483647.  
**Note:** The locale setting for your account effects how numbers are formatted, including the addition of commas to a number. If you need to store a static number (i.e. a number that is not incrementing or decrementing) we suggest using either a predefined field, or a custom field with a type of **Text**. | Displays a basic input. |
| **Currency** | Any positive or negative number with 2 decimal places.  
**Note:** How currency in your account is managed is determined by the locale setting for your account. To change you locale settings, go to **Home > Settings > Formatting** and select the relevant locale from the list. | Displays a basic input. |
| **Decimal** | Any positive or negative number with a decimal point. | Displays a basic input. |
| **Date** | A value that matches a specific date. The format for the date should match the date format set for your account.  
**Tip:** For more information on the date format in your account, see **Configure System Formatting** on page 1349. | Displays a calendar that allows you to select a specific day of the year. |

**Tip:** Fields created with a type of **Number** can store any 10-digit whole number less than or equal to 2147483647. If you need to store a static number (i.e. a number that is not incrementing or decrementing) we suggest using either a predefined field, or a custom field with a type of **Text**. For example, if you want to store telephone numbers, we suggest you use one of the predefined fields created for storing telephone numbers. If you are storing incrementing or decrementing numbers in a custom field created with a type of **Number**, you need to be mindful of the 10-digit, 2147483647 limit.

**Tip:** You can store incrementing or decrementing data in a field created with a type of number, decimal, or currency using Direct Update. For information on using Direct Update, see **Direct Update** on page 1110.

For information on creating custom fields, see **Create Custom Contact Fields** on page 562.
When creating new fields, you can select several predefined field types that are representative of the most common fields created by marketers. If you want to create a custom field that does not use a pre-defined type see Create Custom Contact Fields on page 562.

**Tip:** Any field used in a message must contain less than 1 MB of data.

To create a default field:

1. Go to Tables > Contacts > Fields.
2. Click Create New Field.
3. Click the Predefined radio button.
4. Select a field from the Predefined Fields pull-down menu. You can select the following predefined fields:
   - Salutation: The following options are provided by default:
     - Dr. (dr)
     - Mr. (mr)
     - Mrs. (mrs)
     - Miss (miss)
     - Ms. (ms)
     - Professor (professor)
   - First Name
   - Last Name
   - Age
   - Gender
   - Birthday
   - Address
   - Address (Continued)
   - City
   - State (Full Name)
   - State (Two-Letter Abbreviation)
   - State (Uppercase Two-Letter Abbreviation)
   - State or Province
   - Postal/ZIP Code
   - Country
   - Country (Pick From List)
   - Home Phone Number
   - Work Phone Number
   - Mobile / Cell Phone Number
   - Number of Children
   - Highest Level of Education: The following options are provided by default:
     - Some High School (somehighschool)
     - High School (highschool)
     - Some College (somecollege)
     - College (college)
     - Some Graduate School (somegraduate)
     - Graduate Degree (graduate)
• Marital Status: The following options are provided by default:
  • Single (single)
  • Married (married)
  • Divorced (divorced)
  • Widowed (widowed)

5. Click
  • **Save** to finish creating the field
  • **Save and Add Another** to finish creating this field and add another

### Create Custom Contact Fields

The number of fields that you can create depends on the edition of the application that you have. For more information, see your contract or contact support.

**Tip:** Any field used in a message must contain less than 1 MB of data.

To create a custom field:

1. Go to **Tables > Contacts > Fields.**
2. Click **Create New Field.**
3. Click the **Custom** radio button.

4. Add a name for the field in the **Name** text box.
   
   The name for a field is an internal designation chosen when creating custom fields - for example the "height" field. The name can contain both upper and lower case alphanumerical characters, and can also have underscores.
   
   **Warning:** The Name cannot contain dashes or spaces.

5. Add a label for the field in the **Label** text box.
   
   The label for a field is an external label associated with the field. The label is chosen when creating custom fields. For example, the label for the "height" field might be "Enter your height:.

6. Select a type for the field using the **Type** pull-down menu.
   
   The type you select for a field should depend on the type of data stored in the field.
   
   For more information on the type of data that can be stored in a field, see **Contact Field Types** on page 559.

7. Select the visibility for the field using the **Visibility** pull-down menu.
There are two visibility options you can select when creating custom fields. Public fields are visible to you and can be made visible to your contacts. Private fields are visible only to you.

8. Optional: You can map the field to a Facebook field.

This will populate that field with data pulled from a contact's Facebook account when they click Login with Facebook from a webform. We currently allow you to map the following data from Facebook to fields in your account:

- Biography
- Birthday
- Email
- First Name
- Last Name
- Gender
- Location

Note: For Add Contacts, Look Up Contacts, and Manage Preferences webforms, we allow you to add a Login with Facebook link that lets contacts subscribe or edit their information using their Facebook login information. For more information on allowing contacts to login using Facebook, see Allow Contacts To Login With Facebook on page 218.

You will need to have the Facebook integration enabled and set up in your account in order to map Facebook fields to fields in your account. For information on how to set up the Facebook integration, see Set Up Your Account So You Can Post To Facebook on page 1287.

9. Click the Contact List checkbox if you want the field to be visible when you are viewing the table on the Search Contacts page.

( Go to Tables > Contacts > Search Contacts).

10. Click

- Save to finish creating the field
- Save and Add Another to finish creating this field and add another

Related Topics
Set Up Your Account So You Can Post To Facebook on page 1287

Integrating your account with a Facebook account allows you to post messages to Facebook.

Copy Contact Fields

Copying a field allows you to make a duplicate of an existing field.

Note: After the field is copied, a notification message will appear that provides you with a link to view the copied field and associated values in .CSV file format.

To copy a field:

1. Go to Tables > Contacts > Fields.
2. Click Copy Field [ ].
3. Add a name for the field in the Name text box.

   The name for a field is an internal designation chosen when creating custom fields - for example the "height" field. The name can contain both upper and lower case alphanumeric characters, and can also have underscores.

   Warning: The Name cannot contain dashes or spaces.
4. Add a label for the field in the Label text box.

   The label for a field is an external label associated with the field. The label is chosen when creating custom fields. For example, the label for the "height" field might be "Enter your height: ".
5. Select the visibility for the field using the Visibility pull-down menu.
There are two visibility options you can select when creating custom fields. Public fields are visible to you and can be made visible to your contacts. Private fields are visible only to you.

6. Click **Save**.

**Edit Contact Fields**

You cannot change a contact field's data type. This ensures that any marketing message currently using the field are not broken when the field is changed. However, sometimes the formatting rules related to a contact field's data type might cause issues so we provide the ability to turn off automatic data type formatting to troubleshoot this issue.

To edit your custom field:

To edit a field:

1. Go to **Tables > Contacts > Fields.**
2. Click **Edit Field**.
3. Add a name for the field in the **Name** text box.
   - The name for a field is an internal designation chosen when creating custom fields - for example the "height" field. The name can contain both upper and lower case alphanumeric characters, and can also have underscores.
   - **Warning:** The Name cannot contain dashes or spaces.
4. Add a label for the field in the **Label** text box.
   - The label for a field is an external label associated with the field. The label is chosen when creating custom fields. For example, the label for the "height" field might be "Enter your height:"
5. Select the visibility for the field using the **Visibility** pull-down menu.
   - There are two visibility options you can select when creating custom fields. Public fields are visible to you and can be made visible to your contacts. Private fields are visible only to you.
6. Optional: You can map the field to a Facebook field.
   - This will populate that field with data pulled from a contact's Facebook account when they click **Login with Facebook** from a webform. We currently allow you to map the following data from Facebook to fields in your account:
     - Biography
     - Birthday
     - Email
     - First Name
     - Last Name
     - Gender
     - Location
   - **Note:** For Add Contacts, Look Up Contacts, and Manage Preferences webforms, we allow you to add a **Login with Facebook** link that lets contacts subscribe or edit their information using their Facebook login information. For more information on allowing contacts to login using Facebook, see **Allow Contacts To Login With Facebook** on page 218.
   - You will need to have the Facebook integration enabled and set up in your account in order to map Facebook fields to fields in your account. For information on how to set up the Facebook integration, see **Set Up Your Account So You Can Post To Facebook** on page 1287.
7. If you want Bronto to stop applying strict data type formatting to this contact field, deselect **Use the default formatting for this field type**.
   - We recommend you do not turn off data type formatting. However, there may be times when Bronto auto-applying a format to a custom field might be problematic, in which case an Account Manager or support representative will advise you to turn this off.
8. Click the **Contact List** checkbox if you want the field to be visible when you are viewing the table on the **Search Contacts** page.
   
   (Go to **Tables > Contacts > Search Contacts**).

9. Click **Save**.

**Related Topics**

Set Up Your Account So You Can Post To Facebook on page 1287

Integrating your account with a Facebook account allows you to post messages to Facebook.

### Delete Contact Fields

You cannot delete a contact field if it is being used in an active workflow.

To delete a contact field:

1. Go to **Tables > Contacts > Fields**.
2. Click the **Delete Field** icon.
   
   A warning confirmation box is displayed.

   **Note:** If the field is associated with a workflow, you cannot delete it and a message with a list of its associated workflows is displayed instead.

3. Click **OK** to delete the field.

If you tried to delete a field but cannot because it is associated with workflows, you can remove the field from each of those workflows and then try to delete the field again.

### Add Options To Contact Fields Menus and Buttons

To add options for pull-down menu and radio button field types:

1. Go to **Tables > Contacts > Fields**
2. Locate the field you wish to add options to and click **View/Edit Options**.

3. Click **New Options** at the bottom of the expanded **Options** section.

4. Click **New Option**.
   
   The **Create A New Field Option** window is displayed.

5. In the **Option** text box, add the name or number that will be displayed for the option.

6. Advanced: If you want to add a custom value for the field option, click the **Add custom value to option** checkbox.
   
   Custom values are used when you want the value (i.e. what is passed back to the server) for the option to be something other than what you added in the **Option** text box. For example, let's say you have "Arizona" added in the Option text box. Rather than have "Arizona" passed back to the server, you simply want "AZ" passed back to the server. In this case, you could add "AZ" as the custom value for the "Arizona" field option.

7. Additionally, you can choose to make this option the default option that is selected by clicking the **Make this the default option** checkbox.

8. Click **Save**.

### Re-order Contact Fields And Field Options
Use the handle 🔄 to drag fields and field options to another position, either on the All Fields page, or in the Field Options section.

The order that fields and field values appear on the All Fields page or Field Options section reflects how they will appear to your contacts, and how they will appear in other locations in the application.

**Sort Contact Field Columns**

The columns on the All Fields page can be sorted by clicking on the column headers.

To sort fields on the All Fields page:

1. Go to Tables > Contacts > Fields.
2. Click on a column header.

![Sort Contact Field Columns](image)

**Campaigns**

Campaigns is a feature that provides the ability to organize, track, and manage Bronto messages based on your marketing campaigns.

To enable Campaigns, go to Messages > Campaigns and follow the prompts on the screen. An individual campaign is a specific, self-defined series of messages that align with your email marketing strategy. For example, when you run a holiday marketing campaign all messages sent as part of that should be added to the same Bronto campaign.

Once Campaigns are enabled, all future deliveries sent from your account will need to have an associated campaign. Any deliveries that are already being sent or have been previously scheduled will not be affected. To view your campaigns, go to Messages > Campaigns.
Organize

Grouping messages and deliveries into campaigns allows you to segment, automate, and report based on how you choose to group content in Bronto. Working with campaigns is easy. You simply create a campaign and assign it a type that reflects its intent. Then, as you design messages or schedule deliveries, you can add these to your campaign. As metrics are collected for items in a campaign they are added to the Campaign's Overview page and you can use your newly created campaign in both the workflow and segment builders.

A message and/or a delivery can only be associated with a single campaign. If you change the campaign a message is associated with, any metrics that are collected from future deliveries will be associated with the new campaign. Any metrics that were already collected will be not be rolled over to the new campaign. Instead they will continue to be reported as part of the message's previous campaign.

Since campaigns are required for future deliveries once Campaigns is enabled, we recommend creating the campaigns you want to use and associating them appropriately with messages and workflows shortly after you enable the feature.

Work With Campaigns

This topic covers how to create campaigns, add messages and/or deliveries to campaigns, and use campaigns with segments and workflows.
<table>
<thead>
<tr>
<th>To Do This:</th>
<th>Do This:</th>
</tr>
</thead>
</table>
| Create a campaign | 1. Go to Messages > Campaigns.  
2. Click Create Campaign.  
3. Enter a unique name for the campaign in the Name box.  
4. Select a campaign type from the Type list.  
The type you select should match the type of marketing campaign you plan to associate with this campaign. Is this campaign going be used with a welcome series campaign? Select Welcome from the list.  
5. Enter a description that can be used to distinguish this campaign from others.  
6. Click Save Changes. |
| Add a message to a campaign | You can add a message to a campaign as you create the message or you can add an existing message to a campaign from the Message Overview page. To add an existing message to a campaign:  
1. Go to Messages > Messages.  
2. Click on the name of a message to open its Message Overview page.  
3. Go to the editing section of the page and click Edit in the Campaign area.  
4. To add the message to:  
   • An existing campaign, click on the name of the campaign and then click Apply.  
   • A new campaign, click New Campaign, enter a name for the campaign in the Name box, select a marketing campaign type from the Type list, enter a Description, and then click Save Changes. |
| Remove a message from a campaign | When you remove a message from a campaign, any historical data associated with the campaign will be retained, but future message activity will not be added to the campaign.  
1. Go to Messages > Messages.  
2. Click on the name of a message to open its Message Overview page.  
3. Go to the editing section of the page and click Remove in the Campaign area.  
4. Click Remove. |
<table>
<thead>
<tr>
<th>To Do This:</th>
<th>Do This:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a delivery to a campaign</td>
<td>When you associate a message with a campaign all new deliveries of that message will be associated with the campaign by default. However there may be situations where you want to associate a particular delivery with a different campaign or where you might want to update the campaign for all future deliveries of a message. To associate a delivery with a campaign:</td>
</tr>
<tr>
<td></td>
<td>- Note: This task starts with the assumption that you are in the process of scheduling a regular, test, or A/B split delivery.</td>
</tr>
<tr>
<td></td>
<td>1. Scroll to the campaigns section on the Send Message page.</td>
</tr>
<tr>
<td></td>
<td>2. Click Edit to change the campaign.</td>
</tr>
<tr>
<td></td>
<td>3. To add the delivery to:</td>
</tr>
<tr>
<td></td>
<td>- An existing campaign, click on the name of the campaign and then click Apply.</td>
</tr>
<tr>
<td></td>
<td>- A new campaign, click New Campaign, enter a name for the campaign in the Name box, elect a marketing campaign type from the Type list, enter a Description, and then click Save Changes.</td>
</tr>
<tr>
<td></td>
<td>4. If you want to change the campaign for this delivery only, make sure the Associate all future deliveries of this message with this campaign box is not checked.</td>
</tr>
<tr>
<td></td>
<td>5. Finish scheduling your message.</td>
</tr>
<tr>
<td>Remove a message from a campaign</td>
<td>The only way to remove a message from a campaign is to associate the message with a new campaign. However this will not remove any metrics that have already been collected from the campaign report.</td>
</tr>
<tr>
<td>Edit a campaign</td>
<td>You can edit the name or description of a campaign, but you cannot edit the campaign's type after the campaign has been created. To edit a campaign:</td>
</tr>
<tr>
<td></td>
<td>1. Go to Messages &gt; Campaigns.</td>
</tr>
<tr>
<td></td>
<td>2. Click the pencil icon for the campaign you want to update.</td>
</tr>
<tr>
<td></td>
<td>3. Change the Name or Description.</td>
</tr>
<tr>
<td></td>
<td>4. Click Save Changes</td>
</tr>
<tr>
<td>Archive a campaign</td>
<td>Campaigns cannot be deleted but they can be archived in order to &quot;clean up&quot; the list of available campaigns. This keeps your campaign lists from being cluttered with campaigns that you are not actively using. You cannot associate an archived campaign with a new message or delivery but the campaign will retain any existing message associations. This means if you send a message after you have archived its campaign, the campaign will continue to collect and report on these metrics.</td>
</tr>
<tr>
<td></td>
<td>You also will not be able to use the campaign in a segment or a workflow. To archive a segment:</td>
</tr>
<tr>
<td></td>
<td>1. Go to Messages &gt; Campaigns.</td>
</tr>
<tr>
<td></td>
<td>2. Select the campaign or campaigns you want to archive.</td>
</tr>
<tr>
<td></td>
<td>3. Click the Archive button.</td>
</tr>
<tr>
<td></td>
<td>4. Click Archive.</td>
</tr>
<tr>
<td>To Do This:</td>
<td>Do This:</td>
</tr>
<tr>
<td>------------</td>
<td>----------</td>
</tr>
</tbody>
</table>
| Unarchive a campaign | You can remove a campaign from the archive if you want to use it again.  
1. Go to Messages > Campaigns.  
2. Click Archived Campaigns.  
3. Select the campaign or campaigns you want to unarchive.  
4. Click the Unarchive button.  
5. Click Unarchive.  |

| Use a campaign in a segment | In the segment builder, you can segment using campaign data with any of the Email segment criteria. Please see the Email Segment Criteria on page 464 help topic relevant to want you want to segment on for more information. |

| Use a workflow to add a delivery to a campaign | In the workflow builder you can add a delivery to a campaign in two ways:  
• You can set all deliveries sent from a workflow to be added to the same campaign. See Set A Default Campaign For A Workflow on page 349 for more information.  
• You can set deliveries sent from a Send Email action node to be added to a campaign. Setting a campaign at the node level will override the workflow's default campaign for these deliveries. See Use The Send Email Action Node In Workflows on page 389 for more information. |

**Related Topics**

- Video: Create and Assign A Campaign

**Campaign Overview Page**

The Campaign Overview page is where you can view all of the metrics associated with a campaign, as well as the statistics associated with each email and delivery that is part of the campaign.

The metrics on this page are a collection of the metrics for messages and deliveries that were part of a campaign at the time a message was sent. Summary, Revenue, and Rates are aggregate metrics, or a combination of all of the metrics collected for this campaign, while the metrics in the Email Messages and Email Deliveries sections are specific to a message or delivery.

All metrics in all sections of this report are listed in the table below.

**Summary**

This section offers a quick glance at the metrics that are related to counts, i.e. how many times did something happen. This includes things like how many times your message was sent.
Revenue

This section provides a quick breakdown of the revenue per email and revenue per order so you can see how these relate to the total revenue a campaign has generated. Look here to quickly see if your revenue is being driven more by the number of contacts making purchases or the amount of money contacts are spending.

<table>
<thead>
<tr>
<th>REVENUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>$265,513.08</td>
</tr>
<tr>
<td>Total Revenue</td>
</tr>
</tbody>
</table>

Rates

This section breaks down the percentages for you. While the Summary section gives you the different count (how many) metrics, this section gives you the percentage of engagement. These percentages are frequently calculated by comparing different counts.

<table>
<thead>
<tr>
<th>RATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% Delivery Rate</td>
</tr>
<tr>
<td>76% Conversion Rate</td>
</tr>
</tbody>
</table>

Email Messages

Any message that has ever been a part of the campaign is displayed in this table. The metrics in the table are only for deliveries of the message that were sent while the message was part of the campaign. Any delivery that occurred either before the message was added or after the message was removed is not reported as part of this campaign.

All of the metrics in this table are listed in the All Campaign Metrics section below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name</td>
<td>Name of the message that is stored in Bronto. This is not the same thing as the subject line.</td>
</tr>
<tr>
<td>Type</td>
<td>Currently the type will always be email.</td>
</tr>
</tbody>
</table>

Email Deliveries

Any delivery that was included in this campaign when it was sent is displayed in this table.

All of the metrics in this table are listed in the All Campaign Metrics section below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Subject line used for this delivery.</td>
</tr>
</tbody>
</table>
### Delivery Type

The delivery type represents the type of send. Each type is described below:

- **Normal** - The Normal email delivery type represents a regular email delivery sent to more than one contact.
- **Bulk** - The Bulk email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.
- **Skipped** - The Skipped email delivery type represents email messages that were skipped by Bronto and not sent.
- **Single Contact** - The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.
- **Test** - The Test email delivery type represents email deliveries that were sent as test deliveries.
- **AMR** - The AMR email delivery type represents email deliveries that were sent via an Automated Message Rule.
- **Split Group** - The Split Group email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.
- **FtAF** - The Forwards to a Friend email delivery type represents email deliveries that were sent as part of a FtAF webform. FtAF deliveries do not appear in delivery groups.
- **Transactional** - The Transactional email delivery type represents email deliveries were sent as transactional emails.

**Note:** A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

**Note:** Transactional deliveries are hidden by default. For information on how to show them, see [View Transactional Email Deliveries](#) on page 1014.

### Send Date

Date and time the delivery started.

### All Campaign Metrics

All of the metrics from every section of this report are listed below in alphabetical order.

Clicks, opens, orders, and conversion count metrics are counted on the day they occur, regardless of when their associated delivery was sent. On a message report, this means that there could be more opens than sends, for example, on a given day since some of the opens could from previous days' deliveries. If your click, open, or conversion rate is larger than 100%, it's due to metrics being collected for deliveries whose sends and/or delivered metrics were collected before the start date on the report.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Order Value (AOV)</td>
<td>The average order value is a comparison of the number of orders to the total revenue.</td>
<td>This is important because it provides insight into how much contacts are spending, on average, each time an order is placed.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Net Response Rate</td>
<td>Net Response Rate is a composite metric that represents open rate times click through rate times conversion rate.</td>
<td>This is important because it represents the most comprehensive performance of your email content as it relates to opens, click throughs, and conversions from end-to-end.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Orders</strong></td>
<td>The number of unique orders that are associated with the message.</td>
<td>This is important because it lets you compare the number of orders to the revenue and revenue per email metrics to determine if revenue is coming from a high volume of orders or from a small volume of high-revenue orders.</td>
</tr>
<tr>
<td><strong>Revenue/ Total Revenue</strong></td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td><strong>Sends</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Total Clicks</strong></td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups</td>
</tr>
<tr>
<td><strong>Total Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
</tbody>
</table>

**Associate A Campaign With A Delivery**

If you have the Campaigns feature enabled, all new deliveries you schedule must be associated with a campaign.

If you have already associated a campaign with the message you are sending you only need to select a campaign on the Send Message page if you want to associate this delivery with a different campaign.

1. Schedule a **Regular**, **Test**, or **A/B Split** delivery from the Email Overview page.
2. Click **Edit** in the Campaign section of the Send Message page.
3. Select the campaign from the list.

   If you want to create a new campaign, click **New Campaign**, enter a name for the campaign in the **Name** box, select a marketing campaign type from the **Type** list, enter a **Description**, and then click **Save Changes**.

4. Click **Apply**.
5. Select the checkbox if you want to make this the (new) default campaign for the message.

**Set A Default Campaign For A Workflow**

If you have enabled Campaigns, you will need to set a default campaign to associate with a workflow's deliveries.

When you set a default campaign, all deliveries sent from the workflow will be added to the campaign unless you set a different campaign in a Send Email node. The Send Email node settings will override the workflow settings when a delivery is sent from a node with campaign settings that are different than the default. See **Use The Send Email Action Node In Workflows** on page 389 for more information.
After enabling campaigns, you will need to set a default campaign for any new workflow you create or for any existing workflow you edit. Existing workflows that you do not edit will continue to work without the default campaign settings. If you set a default campaign for an active workflow, any deliveries in the process of sending will not be associated with the campaign and any deliveries that are triggered after the default campaign is set will be associated with the campaign.

To set a default campaign for a workflow:

1. Go to Automation > Workflows.
2. Click either
   - On the name of a workflow to edit an existing workflow
   - Or Create New Workflow to create a new workflow.
3. Click the button next to the text Default Campaign.
   This text will be None unless a default campaign has already been set for the workflow.
4. To select an existing campaign:
   a) Click on the name of the campaign.
   b) Click Apply.
5. To create and select a new campaign:
   a) Click New Campaign.
   b) Enter a name for the campaign in the Name box
   c) Select a marketing campaign type from the Type list
   d) Enter a Description.
   e) Click Save Changes.
   f) Click Apply.
6. Click Save Changes.

**Delivery Groups**

Delivery groups allow you to group together messages, deliveries, posts, and/or automated message rules in any combination you like.

Delivery groups are collections of deliveries and posts grouped together for the purposes of segmenting and reports. You can add individual deliveries, posts, messages, or automated message rules to a delivery group.

**Note:** Messages and automated message rules are often composed of many individual deliveries and posts. When you add a message or automated message rule to a delivery group, all past and future deliveries or posts will be added to the delivery group.

**View Delivery Groups**

The All Delivery Groups page lists all the delivery groups in your account.

To view this page, go to Messages > Delivery Groups.
Note: By default, your account has three delivery groups, All Deliveries, Marketing Deliveries, and Transactional Deliveries. The All Deliveries delivery group, as the name implies, is a collection of every delivery and post in your account. The Marketing Deliveries delivery group is a collection of all the deliveries and posts in your account, excluding transactional deliveries. The Transactional Deliveries delivery group is a collection of all deliveries in your account, excluding marketing deliveries and posts.

Delivery Groups Page Metrics

When viewing the Delivery Groups page, you can view a table containing all the delivery groups in your account, along with metrics showing how the deliveries and posts in each delivery group are performing.

The metrics displayed in the table are explained below.

Note: For metrics shown for delivery groups on the All Delivery Groups page and on delivery groups reports, it may take up to 30 minutes for the most recent metrics to appear.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliveries</td>
<td>The total number of deliveries and posts that have been added to the delivery group. This includes temporary deliveries, skipped deliveries, and deliveries restricted by user permissions. Note: Messages and automated message rules are often composed of many individual deliveries and posts. When you add a message or automated message rule to a delivery group, all past and future deliveries or posts will be added to the delivery group. Test email deliveries cannot be added to delivery groups.</td>
<td>The Deliveries number is important because it allows you to keep track of how many deliveries and posts have been added to a delivery group. If the number of deliveries or posts in a delivery group becomes to high, you can always create new delivery groups and group your deliveries and posts into smaller, more manageable chunks.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sent</td>
<td>The emails sent metric represents the total number of emails that were sent. Note: Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate. The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO). The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>
| **Contact Loss Rate (email)** | The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.  

*Tip:* For more information on the inactive status type, see *Contact Status* on page 1083. | The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts. |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsubscribe Rate</td>
<td>The <em>Unsubscribe Rate</em> metric represents the percentage of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>The <em>Unsubscribe Rate</em> metric is important because it shows the rate at which contacts are unsubscribing. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric. You can monitor this metric overtime to see if changes to your sending habits are lowering the <em>Unsubscribe Rate</em>.</td>
</tr>
<tr>
<td>Complaint Rate</td>
<td>The <em>Complaint Rate</em> metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.</td>
<td>The <em>Complaint Rate</em> is important because it better clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the Report Spam button (or similarly named button) after receiving an email from you.</td>
</tr>
</tbody>
</table>
You can also filter delivery groups by date and/or type to view a subset of deliveries in the group.

To view the deliveries in a delivery group:

1. Go to Messages > Delivery Groups.
2. Click on the name of a delivery group.
3. Click
   - Email to view the message deliveries in the delivery group
   - Facebook to view the Facebook posts in the delivery group
   - Twitter to view the Twitter posts in the delivery group
   - SMS to view the SMS messages in the delivery group
4. Click Show Advanced Options to filter the deliveries by date or by type.
5. To filter by date:
   a) Set the Starting on and Ending On dates in the Send Date: area.
   b) Click Search.
6. To filter by delivery type
   a) Select the delivery types you want to include in the Delivery Type: area:
      - The Bulk email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.
      - The Skipped email delivery type represents email messages that were skipped by Bronto and not sent.
      - The Test email delivery type represents email deliveries that were sent as test deliveries.
      - The AMR email delivery type represents email deliveries that were sent via an Automated Message Rule.
      - The Single Contact email delivery type represents email deliveries that were sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.
      - The Transactional email delivery type represents email deliveries were sent as transactional emails.
      A delivery type is selected when its box contains a check mark. Normal deliveries are always shown.
   b) Click Search.

Filter Deliveries In Delivery Groups By Date Range And Delivery Type

The Advanced Filtering options allow you to filter email deliveries in delivery groups by date range and delivery type.

To filter email deliveries in delivery groups by date range:

1. Go to Messages > Delivery Groups.
2. Click on the name of a delivery group.
3. Click Show Advanced Options.
4. Click the calendar icon in the Starting On text box.
5. Select a start date.
6. Click the second text box in the Starting On text box.
7. Select a start time.
8. Click the calendar icon in the **Ending On** text box.
9. Select an ending date.
10. Click the second text box in the **Ending On** text box.
11. Select an end time.
12. Optional: In the **Delivery Type** section, click the checkbox next to the type of deliveries you want shown in the table. Available options are:
   - Bulk: messages that were sent in bulk and includes normal deliveries and split deliveries.
   - Skipped: messages that were skipped by Bronto and not sent.
   - Test: messages that were sent with a test status.
   - AMR: messages that were sent using an Automated Message Rule.
   - Single Contact: messages that were only sent to one contact.
   - Transactional: messages that were sent with a transactional status.

   **Note:** Normal deliveries are shown by default. FTAF deliveries are not available in delivery groups.

13. Click **Search**.

**Delivery Group Messages Table**

The Delivery Group's **Messages** table contains all of the messages that have been added to the custom delivery group you are viewing. Below is a description of each column contained in the messages table.

<table>
<thead>
<tr>
<th>Columns Name</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The Message column displays the name of the message.</td>
<td>N/A</td>
</tr>
<tr>
<td>Last Edited</td>
<td>The last edited column shows the date the last time the email message was edited or used in a delivery.</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Deliveries</td>
<td>The total deliveries column indicates the total number of deliveries made using the message. This number excludes test email deliveries.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Note:</strong> Accounts that have a large number of deliveries do not see this column in order to avoid page loading issues.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Test Deliveries</td>
<td>The total test deliveries column indicates the total number of test email deliveries made using the message.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Note:</strong> Accounts that have a large number of deliveries do not see this column in order to avoid page loading issues.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Delivery Group AMR Table**
The **Automated Message Rules** section contains all of the automated message rules that have been added to the delivery group you are viewing. Below is a description of each column contained in the automated message rules table.

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>The <em>Name</em> represents the name of the automated message rule added to the delivery group.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
| **Type**      | The *Type* indicates what kind of automated message rule was added to the delivery group. The types are:  
- Date-based  
- API  
- Activity-based  
- Recurring | Tip: For more information on the different types of automated message rules, see Automated Message Rules on page 419. |
| **Status**    | The *Status* indicates if the automated message rule is active (can send) or inactive (cannot send). | N/A                             |
| **# Sent Last 30 days** | The *# Sent Last 30 Days* metric represents the number of deliveries made via the automated message rule in the last 30 days. | N/A                             |
| **Last Modified** | The *Last Modified* date represents the last time the automated message rule sent a message or was edited. | N/A                             |

**Delivery Group Email Metrics**

The **Email** section contains overview metrics and a table describing all of the email deliveries that have been added to the delivery group you are viewing.

Below is a description of each metric shown.

The metrics shown beneath the rates represent the **Delivered**, **Opens**, **Clicks**, and **Conversions** metrics.
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Sent**    | The emails sent metric represents the total number of emails that were sent.  
**Note:** Deleted email deliveries will still be counted as part of the emails sent metric. | The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered. |
| **Delivery Rate** | The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent.  
DMA/EEC equivalent: *Accepted Rate* | The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you. |
| **Delivered** | The emails delivered metric represents the total number of emails that were successfully delivered.  
DMA/EEC equivalent: *Accepted* | The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent. |
| **Open Rate** | The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered.  
DMA/EEC equivalent: *Render Rate* The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent. | The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line. |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em>  The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
</tbody>
</table>
### Conversion Rate

The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.

The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.

### Conversions

The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.

**Tip:** In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.

The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.

### Email Revenue

The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.

The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| Delivery Type | The delivery Type represents the type of send. Each type is described below:  
  - *Normal* - The *Normal* email delivery type represents a regular email delivery sent to more than one contact.  
  - *Bulk* - The *Bulk* email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.  
  - *Skipped* - The *Skipped* email delivery type represents email messages that were skipped by Bronto and not sent.  
  - *Single Contact* - The *Single Contact* email delivery type represents emails delivered that were sent to only a single contact. Email deliveries sent via workflows are always marked as *Single Contact*, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.  
  - *Test* - The *Test* email delivery type represents email deliveries that were sent as test deliveries.  
  - *AMR* - The *AMR* email delivery type represents email deliveries that were sent via an *Automated Message Rule*.  
  - *Split Group* - The *Split Group* email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.  
  - *FTAF* - The *Forwards to a Friend* email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.  
  - *Transactional* - The  
    *Transactional* email delivery type represents email deliveries were sent as transactional emails.  
<p>| N/A | Note: A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices. Note: Transactional deliveries are hidden by default. For information on how to show them, see View Transactional Email Deliveries on page 1014. |</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| Status      | The Status column indicates the state of the delivery or post. Each status is described below:  
  • *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  • *Partially Sent*  
  • *Canceled*  
  • *Successful* | N/A |
| Send Date   | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  • 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  • 🕒 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |
| Sent        | The emails sent metric represents the total number of emails that were sent.  
  **Note:** Deleted email deliveries will still be counted as part of the emails sent metric. | The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered. |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
</tbody>
</table>
### Contact Loss Rate (email)

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Loss Rate</td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

#### Tip:
For more information on the inactive status type, see Contact Status on page 1083.

---

**Delivery Group Twitter Metrics**

The **Twitter** section contains overview metrics and a table describing all of the Twitter posts that have been added to the delivery group you are viewing.

Below is a description of each metric shown.

#### Overview Metrics

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replies (Twitter)</td>
<td>The Twitter replies metric represents the total number of times users on Twitter replied to a post you made to Twitter. A Twitter user can choose to reply directly to your account via a Twitter post they receive from you by clicking <strong>Reply</strong> in Twitter.</td>
<td>The Twitter replies metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter replies, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to reply to a post.</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Retweets (Twitter)</td>
<td>The Twitter retweets metric represents the total number of times a Twitter post is retweeted. When a message is posted to Twitter, Twitter users can retweet the post and share it with all of their followers.</td>
<td>The Twitter retweets metric is important because it represents a level of engagement with users on Twitter. If a user on Twitter retweets a Twitter message you posted, this generally means they were interested enough in the content of the post to share it with all of their Twitter followers. Retweets have the potential to expose your Twitter posts to a very large audience in a very short period of time.</td>
</tr>
<tr>
<td>Clicks (Twitter)</td>
<td>The Twitter clicks metric represents the total clicks recorded for a Twitter message or post. A click is recorded for a Twitter message or post when a Twitter user clicks a link contained in one of your Twitter posts.</td>
<td>The Twitter clicks metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter clicks, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
</tbody>
</table>

### Twitter Posts Table

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name</td>
<td>The Message Name column displays the name of the Twitter message.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
| Status      | The Status column indicates the state of the delivery or post. Each status is described below:  
  • Skipped - The Skipped status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  • Partially Sent  
  • Canceled  
  • Successful | N/A                           |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| Send Date    | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  • 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  • ⏳️ - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week. | N/A                            |

**Delivery Group Facebook Metrics**

The Facebook section contains overview metrics and a table describing all of the Facebook posts that have been added to the delivery group you are viewing.

Below is a description of each metric shown.
## Overview Metrics

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments (Facebook)</td>
<td>The Facebook comments metric represents the total number of comments recorded for a Facebook message or post.</td>
<td>The Facebook comments metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook comments, you can tell that Facebook users were engaged enough in the content of your post to respond in the form of a comment.</td>
</tr>
<tr>
<td>Likes (Facebook)</td>
<td>The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.</td>
<td>The Facebook likes metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. Generally speaking, it is a positive thing if someone takes the time to like your Facebook post.</td>
</tr>
<tr>
<td>Clicks (Facebook)</td>
<td>The Facebook clicks metric represents the total clicks recorded for a Facebook message or post.</td>
<td>The Facebook clicks metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook clicks, you can tell that Facebook users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
</tbody>
</table>

### Facebook Posts Table

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name</td>
<td>The Message Name column displays the name of the Facebook message.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-------------------------------</td>
</tr>
</tbody>
</table>
| Status      | The Status column indicates the state of the delivery or post. Each status is described below:  
  - *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  - *Partially Sent*  
  - *Canceled*  
  - *Successful* | N/A |
| Send Date   | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  - 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  - 🕒 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |

**Delivery Group SMS Metrics**

The SMS section contains overview metrics and a table describing all of the SMS deliveries that have been added to the delivery group.

Below is a description of each metric shown.
Overview Metrics

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Recipients (SMS)</td>
<td>The <em>Total Recipients (SMS)</em> metric represents the total count of recipients who received an SMS message.</td>
<td>SMS Single Recipients + SMS Multi-Part Recipients = SMS Total Recipients</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Multi-Part Recipients (SMS)</td>
<td>The Multi-Part Recipients (SMS) metric displays the number of recipients who were sent an SMS message that was split into multiple parts due to the message content exceeding the 160 character limit. Each message split will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.</td>
<td>SMS Total Recipients - SMS Single Recipients = SMS Multi-Part Recipients</td>
</tr>
<tr>
<td></td>
<td>Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.</td>
<td></td>
</tr>
<tr>
<td>Total Sent (SMS)</td>
<td>The Total Sent (SMS) sent metric represents the total number SMS messages sent. The Total Sent (SMS) metric is important to know for the purpose of making sure you don't exceed the number of SMS messages allocated for your account.</td>
<td>SMS Delivered + SMS Undeliverable = SMS Total Sent</td>
</tr>
<tr>
<td>Delivered (SMS)</td>
<td>The Delivered (SMS) metric represents the total number of SMS messages that were successfully delivered.</td>
<td>SMS Total Sent - SMS Undeliverable = SMS Delivered</td>
</tr>
<tr>
<td>Undeliverable (SMS)</td>
<td>The Undeliverable (SMS) metric represents the number of sent SMS messages that were not delivered.</td>
<td>SMS Total Sent - SMS Delivered = SMS Undeliverable</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Incoming (SMS)</td>
<td>The <em>Incoming (SMS)</em> metric represents the total number of times contacts replied to an SMS message you sent them.</td>
<td>The <em>Incoming (SMS)</em> metric is a total of the number of times contacts replied to an SMS message you sent them.</td>
</tr>
</tbody>
</table>

**Note:** Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

### SMS Deliveries Table

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name</td>
<td>The <strong>Message Name</strong> column displays the name of the SMS message.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The Status column indicates the state of the delivery or post. Each status is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>- <strong>Skipped</strong> - The <em>Skipped</em> status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <strong>Partially Sent</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <strong>Canceled</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <strong>Successful</strong></td>
<td></td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td><strong>Send Date</strong></td>
<td>The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:</td>
<td>N/A</td>
</tr>
</tbody>
</table>

- For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact’s inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours.

- For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week.

---

**Create A Delivery Group**

You can add individual deliveries, messages, or automated message rules to a delivery group.

To create a delivery group:

1. Go to **Messages > Delivery Groups**.
2. Click **Create New Delivery Group**.
3. Give the delivery group a name in the Name text box.
4. Click **Save**.

At this point, no deliveries have been added to the Delivery group.

**Add Deliveries To A Delivery Group**

Messages are often composed of many individual deliveries. When you add a message to a delivery group, all past and future deliveries will be added to the delivery group. Test deliveries made using the message will not be included in the delivery group. If you want to add test deliveries to a delivery group, you will need to add them individually.

Note: Messages and automated message rules are often composed of many individual deliveries. When you add a message or automated message rule to a delivery group, all past and future deliveries will be added to the delivery group. Test deliveries cannot be added to delivery groups.

To add a delivery or post to a delivery group:

1. Go to **Messages > Delivery Groups**.
2. Click on the name of the delivery group you want to add deliveries to.
3. Click **Add Deliveries**.
4. Select the deliveries you want to add to the delivery group.
5. Click Add Deliveries

**Add Messages To A Delivery Group**

Messages are often composed of many individual deliveries. When you add a message to a delivery group, all past and future deliveries will be added to the delivery group. Test deliveries made using the message will not be included in the delivery group. If you want to add test deliveries to a delivery group, you will need to add them individually.

To add messages to a delivery group:

1. Go to **Messages > Delivery Groups**.
2. Click on the name of the delivery group you want to add messages to.
3. Click **Add Messages**.
4. Select the messages you want to add to the delivery group.
5. Click **Add Messages**

**Add Automated Messages Rules To A Delivery Group**

Automated message rules are often composed of many individual deliveries. When you add an automated message rule to a delivery group, all past and future deliveries will be added to the delivery group.

To add automated message rules to a delivery group:

1. Go to **Messages > Delivery Groups**.
2. Click on the name of the delivery group you want to add automated message rules to.
3. Click **Add Automated Message Rules**.
4. Select the automated message rules you want to add to the delivery group.
5. Click **Add Automated Message Rules**.

**View A Delivery Group Report**

Viewing a report for a delivery group allows you to see all of the metrics associated with the deliveries added to the delivery group.

Each tab at the top of a delivery group report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.
- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.
- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.
- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (legacy) on page 734.
- **Metrics By Delivery** displays a quick view of the metrics associated with the deliveries of the message. For more information about Metrics By Delivery metrics, see Metrics By Delivery Report Metrics (Legacy) on page 737.
- **Profiler** allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For more information about Profiler, see Report Profiler on page 751.

For more about a delivery group report, see Delivery Group Reports on page 688.

To view a report for a delivery group:

1. Go to **Messages > Delivery Groups**.

Organize
2. Click on the name of the delivery group you want to view a report for.
3. Click View Report.
4. Click a tab at the top of the report to view the different sections of the report.
   For example, click Deliverability to view the detailed deliverability metrics. For more information about report
sections, see Report Sections (Legacy Reports) on page 702.
5. To filter the report by a date range:
   a) Click the calendar icon.
      The calendar icon is to the right of the last report section tab.
   b) Select a date filter from the list of available filters.
      If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.
      When you filter a report by a date range, report metrics in gray bars and graphs may vary from the metrics in
      report grids because these datasets are collected differently. Metrics provided in bars and graphs are based on
      the event date. Metrics provided in report grids, like the grid on the Clicks tab, are based on the delivery date.
   c) To use a custom date range, click Custom and add a start and an end date in the date boxes.
   d) To remove the filter, click the calendar icon and then click on All Time.
You can also:
• Download A Summary of Detailed Contact Report on page 821
• Add Contacts From A Report To A List on page 853
• View A Comparison Report From A Delivery Group Report on page 689
• View A Report For A Specific Delivery Added To A Delivery Group on page 688
• Print a report by clicking the Print button.

Related Topics
Report Sections (Legacy Reports) on page 702
Report sections are the grouping of metrics that are found on reports.

View A Delivery Groups Comparison Report
You can add delivery groups to a comparison report from the delivery groups page.
You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

For more information on comparison reports, see Comparison Reports on page 756.

To add an item to comparison report:

1. Go to Messages > Delivery Groups.
2. Click the checkbox in the row associated with the delivery group(s) you want to add to the comparison report.
3. Click Compare.
   The comparison report is displayed.
4. Provided you have less than six items added to the comparison report, you can add additional items to compare by clicking
   - Add Delivery
   - Add Message
   - Add Automated Message
   - Add Delivery Group

Delete A Delivery Group

You can delete a delivery group.

To delete a delivery group:

1. Go to Messages > Delivery Groups.
2. Click on the name of a delivery group.
3. Click Delete.
4. Click Delete.

Report

Bronto is currently in the process of updating reporting, so the Report Knowledge base topics cover both Bronto's newest report feature and legacy reporting.

Topics are largely organized based on whether something is a new report or legacy reporting.

New Reports

New Reports' Types

Bronto provides an opportunity to examine metrics from a variety of angles by offering the ability to view the same metrics in different types of reports.

Important: Your account must have Order Service enabled.

Currently New Reports has six report types: an Email Performance report, message reports, delivery reports, A/B Split reports, list reports, and segment reports. Metrics for each of these reports are broken up into different tabs, with the metrics in each tab targeted on a different area. These tabs are (mostly) the same across reports and contain the same metrics no matter what type of report you're looking at. Each report type gives the metrics a different context.

For example, all reports have the Overview tab with the same sends, clicks, conversion, etc. metrics in it. The definition of the click metric is the same no matter what type of report it is viewed on. But when you view a message report, the clicks metric is the total number of clicks for that message across all deliveries of the message.
Your report will only include data for events that occur in the selected data range. For example, a Message Report will only include send, open or click data if send, open, or click events occurred within your specified date range. It is possible to have zero sends or deliveries, while still seeing opens, clicks, etc. since the sends may not have occurred in your selected date range.

Therefore, to get the most out of reports you need to understand how a metric is calculated, what it means, and consider it in the context of the report type you're viewing.

Click on the links below to learn more about each report type.

**Email Performance Report**

The **Email Performance** report provides site-level metrics for all deliveries of all emails in your account.

**Important:** Your account must have Order Service enabled.

The report includes metrics for all email deliveries that have been sent since New Reports was enabled in your account. This means that when the report is set to **All Time**, the email performance metrics displayed do not include metrics collected by the legacy reporting system or SMS, Facebook, or Twitter metrics.

You can access the email performance report by going to **Reports > Email Performance**.

When you open the report, the **Overview** tab is displayed. You can click the different tabs above the report content (Deliverability, Opens, Clicks, etc.) to view detailed metrics about that area. For example, if you click **Devices** you will see a breakdown of engagement by device.

By default, the report is set to show:

- **All Time** metrics, which means everything since Bronto started collecting New Report metrics for your account.

  Narrow the time scope of the report by clicking the calendar icon and setting a time range. This can be as general as filtering to see metrics for the previous quarter or as specific as filtering the range down to between two dates that you specify.

- **Order** metrics related to the default currency that you've set for your Bronto account. If you operate a multi-currency business, you can use the currency filter to change the metrics displayed in the report based on currency. You can only view metrics related to one currency at a time. So, if you have 3 orders in USD and 2 orders in Euros, you will only see the order metrics related to the 3 orders when USD is selected.
You cannot break down this report into metrics for specific emails or deliveries. If you want to view the metrics associated with a specific delivery of a message, open the relevant delivery report. Instead, you should open the relevant message or delivery report to see this information.

The Email Performance Report maintains metrics for all deliveries, even deliveries that have been deleted. If you add up the metrics on all the available delivery reports for deliveries made from a message, they may not match the totals on the message report due to the presence of metrics from deleted deliveries.

**Note:** Currently the metrics associated with test deliveries are not included in message reports.

An Email Performance Report contains the following tabs:

- **Overview** provides a high-level view of the metrics associated with a message.
- **Deliverability** contains all of the metrics related to the delivery of a message.
- **Opens** provides metrics related to opens, including when and where a message is opened.
- **Clicks** contains metrics related to contact engagement and individual links within the message.
- **Conversions** provides a detailed look at message conversions and orders.
- **Devices** provides message-level insight into what types of devices your contacts use.

**Message Reports**

Message reports contain the metrics associated with every delivery of that message.

**Important:** Your account must have Order Service enabled.

You can access a message report by going to Messages > Messages and clicking the report icon for a message in the Email table or by clicking View Full Message Report on the message's overview page.

You will only see Bronto's new message report format if:

- You have New Reports
- The message was created after you enabled New Reports. Currently, New Reports only collects delivery metrics for deliveries that are sent after it is enabled in your account. Because existing messages are associated with past deliveries, these messages will continue to appear in the legacy report format. Metrics for future sends of this message will still be collected and reported in the legacy report format. Any new messages you create will have the updated report format. If you have an existing message and that you want to see in the new report format:
  1. Make a copy of the message.
  2. Schedule new deliveries to use the newly created copy message.
  3. If you need to report on future and previous deliveries, manually (outside of Bronto) add metrics from the previous deliveries of the original message to the metric for the new copy of the message.
When you open a message report, the **Overview** tab is displayed. You can click the different tabs above the report content (Deliverability, Opens, Clicks, etc.) to view detailed metrics about that area. For example, if you click **Devices** you will see a breakdown of message engagement by device. You can also click the name of the report to view the **Message Overview** page.

By default, the report is set to show:

- **All Time** metrics, which means everything since Bronto started collecting metrics for this message. You can narrow the time scope of the report by clicking the calendar icon and setting a time range. This can be as general as filtering to see metrics for the previous quarter or as specific as filtering the range down to between two dates that you specify.

- Order metrics related to the default currency that you've set for your Bronto account. If you operate a multi-currency business, you can use the currency filter to change the metrics displayed in the report based on currency. You can only view metrics related to one currency at a time. So, if you have 3 orders in USD and 2 orders in Euros, you will only see the order metrics related to the 3 orders when USD is selected.

If you want to view the metrics associated with a specific delivery of a message, open the relevant delivery report. You can open the delivery report from this page by clicking the **Deliveries** tab then clicking the report icon for the relevant delivery.

Message reports maintain metrics for all deliveries, even deliveries that have been deleted. If you add up the metrics on all the available delivery reports for deliveries made from a message, they may not match the totals on the message report due to the presence of metrics from deleted deliveries.

**Note:** Currently the metrics associated with test deliveries are not included in message reports.

A message report contains the following tabs:

- **Overview** provides a high-level view of the metrics associated with a message.
- **Deliverability** contains all of the metrics related to the delivery of a message.
- **Opens** provides metrics related to opens, including when and where a message is opened.
- **Clicks** contains metrics related to contact engagement and individual links within the message.
• **Conversions** provides a detailed look at message conversions and orders.
• **Devices** provides message-level insight into what types of devices your contacts use.
• **Deliveries** contains a list of the message deliveries and the high-level metrics associated with each delivery.
• **Profiler** allows you to view delivery, message, and delivery group metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes.

**Related Topics**

Video: View Message and Delivery Reports

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**Delivery Reports**

Delivery reports contain the metrics associated with a single delivery of a message.

⚠️ **Important:** Your account must have Order Service enabled.

You can access a delivery report by going to **Messages > Deliveries** and clicking the report icon for a delivery in the table or by clicking the report icon on the **Deliveries** tab of a message report.

You will only see Bronto's newest delivery report format if:

• You have New Reports.
• The delivery was sent after you enabled New Reports. Currently, New Reports only collects delivery metrics for deliveries that are sent after it is enabled in your account.
When you open a report, the **Overview** tab is displayed. You can click the different tabs above the report content (Deliverability, Opens, Clicks, etc.) to view detailed metrics about that area. For example, if you click **Devices** you will see a breakdown of message engagement by device. You can also click the name of the report to view the **Message Overview** page.

At the top of the **Overview** tab you can see the delivery details. This includes information about:

- Who sent the message.
- When the message was sent. If you used send time optimization, icons that indicate if the delivery was optimized by time and/or day are displayed. You will also be able to see the scheduled sending time (our projected maximum send time) and the actual sending time (the actual time the delivery took to complete after the delivery has been made). For more information on using send time optimization, see **Optimize The Sending Time Of An Email Delivery** on page 284.

If you set a throttle for a delivery, you can see the throttle used next to the scheduled start. Next to the sending time, you can view the percentage of the delivery that has completed (if it is still sending), and the total elapsed time for the delivery (after the delivery has completed.)

- Which lists and/or segments the message was sent to.
• What Campaign the delivery is associated with.

Note: You will only see this if you have enabled Campaigns.

• Whether the delivery was successful.

• The delivery type.

The delivery type represents the type of send. Each type is described below:

• **Normal** - The Normal email delivery type represents a regular email delivery sent to more than one contact.

• **Bulk** - The Bulk email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.

• **Skipped** - The Skipped email delivery type represents email messages that were skipped by Bronto and not sent.

• **Single Contact** - The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.

• **Test** - The Test email delivery type represents email deliveries that were sent as test deliveries.

• **AMR** - The AMR email delivery type represents email deliveries that were sent via an Automated Message Rule.

• **Split Group** - The Split Group email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.

• **FTAF** - The Forwards to a Friend email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.

• **Transactional** - The Transactional email delivery type represents email deliveries were sent as transactional emails.

By default, the report is set to show:

• **All Time** metrics, which means everything since Bronto started collecting metrics for this message. You can narrow the time scope of the report by clicking the calendar icon and setting a time range. This can be as general as filtering to see metrics for the previous quarter or as specific as filtering the range down to between two dates that you specify.

• Order metrics related to the default currency that you've set for your Bronto account. If you operate a multi-currency business, you can use the currency filter to change the metrics displayed in the report based on currency. You can only view metrics related to one currency at a time. So, if you have 3 orders in USD and 2 orders in Euros, you will only see the order metrics related to the 3 orders when USD is selected.

A delivery report contains the following tabs:

• **Overview** provides a high-level view of the metrics associated with a delivery.

• **Deliverability** contains all of the metrics related to the delivery of messages.

• **Opens** provides metrics related to opens, including when and where a message was opened.

• **Clicks** contains metrics related to contact engagement and individual links within the.

• **Conversions** provides a detailed look at message conversions and orders.

• **Devices** provides delivery-level insight into what types of devices your contacts use.

• **Heat Map** provides a heat map where link engagement metrics are overlayed on top of your message content.

• **Recipients** contains all of the list or segment metrics associated with an individual delivery.
Profiler allows you to view delivery, message, and delivery group metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes.

Related Topics

Video: View Message and Delivery Reports

Segment Reports

Segment reports contain all of the delivery-related metrics collected for contacts on a segment during the time the contacts are on the segment.

Important: Your account must have Order Service enabled.

Segment reports work like this. You send a delivery to a segment. Metrics for contacts on the segment at the time the delivery was scheduled are collected and added to the segment report. Later, a contact who was part of that delivery is moved off of the segment but the metrics for that contact remain on the segment report. When other contacts are added to the segment, any past metrics that are associated with those contacts are not added to the segment report.

Why?

The segment report is a view into the behavior of contacts who match a certain profile. (The profile you set up with segment criteria when you created the segment.) A contact only matches the segment criteria when they are on the segment. What a contact does while on the segment is a valuable metric for understanding how contacts on a segment behave because they matched the segment criteria at the time the metrics were collected. To remove those metrics when the contact moves off of the segment would cause you to lose valuable historical data for the segment. At the same time, what a contact does when they don't match the segment criteria is irrelevant to understanding segment behavior.

You can access a segment report by going to Tables > Contacts > Segments and clicking the report icon for a segment in the table. You will only see segment reports if you have New Reports and you can only see data for segment reports when you have sent to a segment after New Reports is enabled.

When you open a report, the Overview tab is displayed. You can click the different tabs above the report content to view detailed metrics about that area. For example, if you click Devices you will see a breakdown of message engagement by device. You can also click the name of the report to view the Segment Overview page.

By default, the report is set to show:

- All Time metrics, which means everything since Bronto started collecting metrics for this message. You can narrow the time scope of the report by clicking the calendar icon and setting a time range. This can be as
general as filtering to see metrics for the previous quarter or as specific as filtering the range down to between two dates that you specify.

- Order metrics related to the default currency that you've set for your Bronto account. If you operate a multi-currency business, you can use the currency filter to change the metrics displayed in the report based on currency. You can only view metrics related to one currency at a time. So, if you have 3 orders in USD and 2 orders in Euros, you will only see the order metrics related to the 3 orders when USD is selected.

A segment report contains the following tabs:
- **Overview** provides a high-level view of the metrics associated with a segment.
- **Devices** provides segment-level insight into what types of devices your contacts use.

**List Reports**
List reports contain all of the delivery-related metrics collected for contacts on a list during the time the contacts are on the list.

1. **Important:** Your account must have Order Service enabled.

This means that a list reports collect metrics for contacts on the list at the time a delivery was sent to the list. If a contact who was part of that delivery is removed from a list, the metrics for that contact will remain on the list report. When other contacts are added to the list, any past metrics associated with these contacts are not added to the list report.

This allows you to track list metrics, not individual contact metrics. What a contact does when they are not on the list is irrelevant to understanding the list's behavior. Contacts are grouped into lists to serve a particular purpose. To add or remove metrics as contacts are added or removed from a list would make it difficult to clearly see list trends and would cause the report to lose valuable historical data for the list. For example, if you create a list used to onboard new contacts, you only want to see the metrics for contacts who are on the list while they're being onboarded. Knowing this could allow you to make better decisions about your future onboarding strategy.

You can access a list report by going to **Tables > Contacts > Lists** and clicking the report icon for a list in the table. You will only see list reports if you have New Reports and you can only see data for list reports when you have sent to a list after New Reports is enabled.
When you open a report, the **Overview** tab is displayed. You can click the different tabs above the report content to view detailed metrics about that area. For example, if you click **Devices** you will see a breakdown of message engagement by device. You can also click on the name of the list to view the **List Overview** page.

By default, the report is set to show:

- **All Time** metrics, which means everything since Bronto started collecting metrics for this message. You can narrow the time scope of the report by clicking the calendar icon and setting a time range. This can be as general as filtering to see metrics for the previous quarter or as specific as filtering the range down to between two dates that you specify.
- Order metrics related to the default currency that you've set for your Bronto account. If you operate a multi-currency business, you can use the currency filter to change the metrics displayed in the report based on currency. You can only view metrics related to one currency at a time. So, if you have 3 orders in USD and 2 orders in Euros, you will only see the order metrics related to the 3 orders when USD is selected.

A list report contains the following tabs:

- **Overview** provides a high-level view of the metrics associated with a list.
- **Devices** provides list-level insight into what types of devices your contacts use.

**A/B Split Reports**
A/B Split reports contain all of the metrics collected for the split groups that were a part of an A/B Split test.

**Important**: Your account must have Order Service enabled.
You can access an A/B Split report by going to Tables > Deliveries, clicking the A/B split report icon for a delivery in the table, and then clicking View A/B Split Report on the A/B Split Comparison Report. You will only see new A/B Split reports if:

- You have New Reports.
- The A/B split test was scheduled after New Reports is enabled.

When you open a report, the Overview tab is displayed. You can click the different tabs above the report content to view detailed metrics about that area. For example, if you click Devices you will see a breakdown of message engagement by device. You can also click the name of the report to view the A/B Split Comparison Report page.

By default, the report is set to show:

- **All Time** metrics, which means everything since Bronto started collecting metrics for this message. You can narrow the time scope of the report by clicking the calendar icon and setting a time range. This can be as general as filtering to see metrics for the previous quarter or as specific as filtering the range down to between two dates that you specify.
- Order metrics related to the default currency that you've set for your Bronto account. If you operate a multi-currency business, you can use the currency filter to change the metrics displayed in the report based on currency. You can only view metrics related to one currency at a time. So, if you have 3 orders in USD and 2 orders in Euros, you will only see the order metrics related to the 3 orders when USD is selected.

An A/B Split report contains the following tabs:

- **Overview** provides a high-level view of the metrics associated with an A/A Split test.
• **Split Groups** provides a lists of the split groups associated with the A/B Split test and the high-level metrics associated with each group.

• **Deliverability** contains all of the metrics related to the deliveries.

• **Opens** provides metrics related to opens, including when and where a message is opened.

• **Clicks** contains metrics related to contact engagement and individual links in a message.

• **Conversions** provides a detailed look at message conversions and orders.

• **Devices** provides insight into what types of devices your contacts use.

### New Reports’ Tabs

A report tab is an area of a report that contains a collection of metrics that relate to each other.

#### Important: Your account must have Order Service enabled.

You can access a report tab by opening a report and clicking one of the tab headings near the top of the report.

These tabs are (mostly) the same across reports and contain the same metrics no matter what type of report you're looking at. Any report-level differences on a tab are noted in the help topic.

It's important to keep in mind that while the metrics are the same across report types, the context of the metric is specific to the type of report. For example, the definition of the open metric is the same no matter what type of report it is viewed on. But when you view a message report, the open metric is the total number of opens for that message across all deliveries of the message. When you view the opens metric on a delivery report, the opens metric is the total number of opens for just that delivery. Etc. Therefore, to get the most out of reports you need to understand how a metric is calculated, what it means, and consider it in the context of the report type you're viewing.

Click on the links below to learn more about each report tab.

#### Report Overview Metrics

The **Overview** tab on a report provides a high-level view of the metrics associated with a report.

This tab is a good place to start when you want to understand the "health" of a message and recognize where message engagement might be failing or succeeding. Do you have a lot of opens but not a lot of clicks? Is the conversion rate particularly high for this message? The answers to these questions can help you understand the effectiveness of the design decisions you made in the message.

When you notice an unusual metric here, you can click the tab that corresponds with the metric type to dig deeper into what is going on. For example, if you want to know more about your delivery metrics, click the **Deliverability** tab.

The **Overview** tab is divided into five areas, each with a distinct label. We've broken up this help topic into sections based on those areas to make information easier to find. Every metric from every area of this tab can be found in the table at the end of this help topic.

**Note:** Both the **delivery** and A/B Split reports have a delivery information heading located at the top of the **Overview** tab. The content in this area is defined in the help topic for these reports.

### Summary

This section offers a quick glance at the metrics that are related to counts, i.e. how many times did something happen. This includes things like how many times your message was sent. All of the counts in the section can also be viewed in the Performance Over Time section.
Revenue

This section provides a quick breakdown of the revenue per email and revenue per order so you can see how these relate to the total revenue a message has generated. Look here to quickly see if your revenue is being driven more by the number of contacts making purchases or the amount of money contacts are spending.

<table>
<thead>
<tr>
<th>Sends</th>
<th>Delivered</th>
<th>Total Opens</th>
<th>Total Clicks</th>
<th>Orders</th>
<th>Conversions</th>
<th>Contact Updates</th>
</tr>
</thead>
<tbody>
<tr>
<td>692</td>
<td>691</td>
<td>51</td>
<td>69</td>
<td>230</td>
<td>19</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Revenue</th>
<th>Revenue Per Email</th>
<th>Average Order Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>$265,513.08</td>
<td>$383.689</td>
<td>$1,154.40</td>
</tr>
</tbody>
</table>

All of the revenue metrics in this section can also be viewed in the Performance Over Time section.

Rates

This section breaks down the percentages for you. While the Summary section gives you the different count (how many) metrics, this section gives you the percentage of engagement. These percentages are frequently calculated by comparing different counts.

Performance Over Time

This section provides a configurable graph that can be used to:

- View counts, rates, and revenue metrics at different points in time.
- See time-based trends for individual metrics.
- Visually compare different metrics, and their trends, against each other.
You can view any count, rate, or revenue metrics on this graph. Count and revenue metrics are represented using a line graph and rate metrics are represented with bar graphs. Each metric is color coded and the guide for metrics currently represented on the graph are provided in the legend below the graph. Click the filter icon and click on a metric to either add or remove it from the graph.

You can mouse over the graph to see the visible metrics at different points in time.

The time range shown is the length of time set for the report. You can change this by clicking the calendar icon and setting a different report range. When you do this, all of the other metrics on the report will also be updated.

**Comparisons**

This section provides a visual comparison of rates against each other. It's a way to quickly see if there are any issues that need to be addressed. Each metric is represented by a different color on the circle and you can mouse over the segments of the circle to focus on a segment.
Sent vs Delivered

The expectation is that most of the messages you send are delivered successfully and this lets you see if that's happening. If you see that Delivered is a small segment compared to Sent there is a sending issue you need to address. You might want to investigate the validity of the contacts on the lists or segments you sent to.

Delivered vs Total Opens

This lets you quickly see if contacts open the messages they're sent. If Total Opens is a small segment compared to the Delivered segment, you might want to try adjusting your sending options or subject line. Running an A/B Split test can help you investigate these issues.

Total Opens vs Total Clicks

This helps you see if contacts who open your messages are engaging with them. If Total Clicks is a small segment compared to the Total Opens segment, you might want to reconsider message design choices.

Contact Loss

This breaks down the sources of contact loss to complaints, unsubscribes, and/or bounces. Knowing where contact loss is coming from, particularly if this metric is high, can help you understand how to stop it.

All Overview Tab Metrics

All of the metrics from every section of this tab are listed below in alphabetical order.

Clicks, opens, orders, and conversion count metrics are counted on the day they occur, regardless of when their associated delivery was sent. On a message report, this means that there could be more opens than sends, for example, on a given day since some of the opens could from previous days' deliveries. If your click, open, or conversion rate is larger than 100%, it's due to metrics being collected for deliveries whose sends and/or delivered metrics were
collected before the start date on the report. You can click the calendar 📅 icon and adjust the time range to include the send and delivery metric.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Order Value (AOV)</strong></td>
<td>The average order value is a comparison of the number of orders to the total revenue.</td>
<td>This is important because it provides insight into how much contacts are spending, on average, each time an order is placed.</td>
</tr>
<tr>
<td><strong>Click Through Rate (CTR)</strong></td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link. <strong>Tip:</strong> The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Contact Update Rate</strong></td>
<td>This metric represents the percentage of contacts who updated information using a manage preferences link contained in the email compared to the number of contacts who were sent the email.</td>
<td>This is important because a high rate can reveal an issue with the accuracy of your contact data. If you notice that the contact updates number is high, dig a little deeper and find out what updates contacts make using the manage preferences page. Depending on these actions, you may need to rework the content of the email, or reevaluate the lists or segments you've sent to.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were</td>
<td>The Emails delivered metric is important because it lets you know how many total</td>
</tr>
<tr>
<td></td>
<td>successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>total emails were successfully delivered. Once you know how many emails were</td>
</tr>
<tr>
<td></td>
<td></td>
<td>successfully delivered, you can begin further evaluating the levels of contact</td>
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<tr>
<td></td>
<td></td>
<td>engagement (opens, clicks, conversions). You can also figure out how many</td>
</tr>
<tr>
<td></td>
<td></td>
<td>unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully</td>
<td>The delivery rate metric is important because it represents the first step in</td>
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<td></td>
<td>delivered, as compared to the total emails that were sent. DMA/EEC equivalent:</td>
<td>determining the success of your email marketing efforts. In order for contacts</td>
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<tr>
<td></td>
<td>Accepted Rate</td>
<td>to open, click, and eventually convert, they first have to receive an email from</td>
</tr>
<tr>
<td><strong>Net Response Rate</strong></td>
<td>Net Response Rate is a composite metric that represents open rate times</td>
<td>This is important because it represents the most comprehensive performance of</td>
</tr>
<tr>
<td></td>
<td>click through rate times conversion rate.</td>
<td>your email content as it relates to opens, click throughs, and conversions from</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as</td>
<td>The open rate is important because it represents the first level of contact</td>
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<td></td>
<td>compared to the number of emails that were successfully delivered. DMA/EEC</td>
<td>engagement. The open rate lets you see out of all the contacts who received the</td>
</tr>
<tr>
<td></td>
<td>equivalent: Render Rate</td>
<td>email you sent, who actually took the time to open it. You can use the open rate</td>
</tr>
<tr>
<td></td>
<td>The calculation does not take into account the send history for individual</td>
<td>to gauge the effectiveness of your from name, from address, and subject line.</td>
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<td>messages. Therefore, on Over Time and Date Range reports, it is possible for</td>
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<td>the rates to equal a value greater than 100% if enough messages sent on a</td>
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<td>date prior to the start of the report are included in the calculation. For</td>
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<td></td>
<td>example, a message was sent 100 times a previous day and 100 times on a date</td>
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<td>within the report range. The message is opened 125 times within the report</td>
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<td></td>
<td>range. In this case, the Open Rate on the report is 125% because the message</td>
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<td></td>
<td>was opened more times than it was sent.</td>
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<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Orders</td>
<td>The number of unique orders that are associated with the message.</td>
<td>This is important because it lets you compare the number of orders to the revenue and revenue per email metrics to determine if revenue is coming from a high volume of orders or from a small volume of high-revenue orders.</td>
</tr>
<tr>
<td>Revenue/ Total Revenue</td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Revenue Per Email</td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td>Sends</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td><strong>Total Opens</strong></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Unique Clicks</strong></td>
<td>The unique clicks metric is the sum of all the unique clicks recorded for a message. A <em>unique click</em> is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
<tr>
<td><strong>Unique Opens</strong></td>
<td>The unique opens metric is the sum of all the unique opens recorded for a message. A unique open is recorded the first time a contact opens a message.</td>
<td>This is important because it helps you better understand the relationship between opens and clicks/conversions. The click rate compares that total opens metric with the total clicks metric. You can compare the number of unique opens to the number of click to see the rate at which the number of contacts who open a message click a link.</td>
</tr>
</tbody>
</table>

**Report Deliverability Metrics**
The Deliverability tab on a report displays all of the metrics related to the delivery of messages.

⚠️ **Important:** Your account must have Order Service enabled.

This is a good place to look for information when you want to better understand how your deliveries are doing. Here you can see if sends are being successfully delivered, what issues might have occurred with deliveries for a message, and if contacts are engaging.

The Deliverability tab is divided into five areas, each with a distinct label. We've broken up this help topic into sections based on those areas to make information easier to find.

**Summary**
This section offers a quick glance at the metrics that are related to counts, i.e. how many times did something happen. Counts includes things like how many times your message was sent and how many times different events prevented the message from being successfully delivered. All of the counts in this section can also be viewed in the Performance Over Time section.
**Rates**

This section displays what percentage of your sent messages were delivered and what percentage of your delivered messages resulted in contact losses. You can see more information about what metrics affected these percentages in the Comparison section.

**Comparisons**

This section provides a visual comparison of rates against each other. It's a way to quickly see if there are any issues that need to be addressed. Each metric is represented by a different color on the circle and you can mouse over the segments of the circle to focus on a segment.

This table explains the comparison of these metrics and how it's important. For information about the individual metrics that are being compared, see the Deliverability Tab Metrics table.
<table>
<thead>
<tr>
<th>Comparison</th>
<th>Description</th>
</tr>
</thead>
</table>
| Undeliverable Sends | A send can be undeliverable due to hard, soft, or spam bounces. Each type of bounce should be addressed in a different way, so knowing what the cause of your undeliverable sends allows you to know where to start troubleshooting.  
  • Hard Bounce: typically from a mailbox and/or domain does not exist for an email address. If you see a lot of hard bounces, evaluate the lists you send to.  
  • Soft Bounce: temporary delivery failures that can be caused by a variety of resolvable issues.  
  • Spam Bounce: email server has identified the email as spam. If you see a number of these, look at the message you sent and run it through a spam test. |
| Soft Bounces        | Typically a soft bounce is due to either a contact or network issue. If you see a large quantity of soft bounces and they are from a network issue, you might want to check if there were any network outages and try sending the message again.  
  • Temporary Contact Issue: temporary issue at the receiving mail server with respect to the contact in question. An example of this is a mailbox full message.  
  • Destination Unreachable: temporary issue at the receiving mail server, such as a server busy message.  
  • Unclassified: the number of bounces that could not be classified using our bounce classification system. |
| Contact Loss        | This breaks down the sources of contact loss to complaints, unsubscribes, and/or bounces. Knowing where contact loss is coming from, particularly if this metric is high, can help you know how to stop it.  
  • Unsubscribes: the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.  
  • Application Complaints: the number of contacts that were lost (made inactive) by complaining via the application through a webform.  
  • ISP Complaints: The ISP complaints metric the number of contacts that were lost (made inactive) by complaining via an ISP feedback loop.  
  • Inactive Due To Bounce: the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. |
<table>
<thead>
<tr>
<th>Comparison</th>
<th>Description</th>
</tr>
</thead>
</table>
| Skipped Deliveries | Skipped deliveries are either from exceeding your sending frequency cap or exceeding your onboarding sending limit. Knowing which of these caused skipped deliveries lets you know which sending behavior to adjust.  
|                  | • Frequency Cap: the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account.  
|                  | • Onboarding: the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time. |

**Performance Over Time**

This section provides a configurable graph that can be used to:

- View counts, rates, and revenue metrics at different points in time.
- See time-based trends for individual metrics.
- Visually compare different metrics, and their trends, against each other

The time range shown is the length of time set for the report. You can change this by clicking the calendar icon and settings a different report range. When you do this, all of the other metrics on the report will also be updated.

You can view any count, rate, or revenue metrics on this graph. Count and revenue metrics are represented using a line graph and rate metrics are represented with bar graphs. Each metric is color coded and the guide for metrics currently represented on the graph are provided in the legend below the graph. Click the filter icon and click on a metric to either add or remove it from the graph.

![Performance Over Time Graph](image)

The count, rate, and revenue metrics are divided into three separate tables to make it easier to find the metric explanation you're looking for,
**Deliverability By Domain (All Time)**

This section displays the performance metrics on a per-domain-basis. The domain column in this table is the sending domain. The main purpose of this table is to allow you to quickly see if any of your domains have issues sending and what might be causing these issues. All of the metrics in this table are defined in the table above.

![Deliverability By Domain (All Time)](image)

**All Deliverability Tab Metrics**

All of the metrics from every section of this tab are listed below in alphabetical order.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Average Order Value</em></td>
<td>This metric represents the average revenue generated per order tracked in your account.</td>
<td>It's important because it gives you an idea of how much contacts are spending, on average, each time an order is made.</td>
</tr>
<tr>
<td><em>Complaints</em></td>
<td>This is the number of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.</td>
<td>This helps clarify why you're losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the Report Spam button (or similarly named button) after receiving an email from you.</td>
</tr>
<tr>
<td><em>Contact Loss Rate</em></td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: <em>Accepted</em></td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: <em>Accepted Rate</em></td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------------</td>
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</tr>
<tr>
<td><strong>Hard Bounce (email)</strong></td>
<td>Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces. <strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
<td>The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td><strong>Revenue</strong></td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The Revenue Per Email metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td><strong>Sends</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td><strong>Skipped (Frequency Cap)</strong></td>
<td>The frequency cap (skipped) metric represents the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account.</td>
<td>There are several reasons why you might see a high number of emails skipped for exceeding your frequency cap settings. You could simply be scheduling too many deliveries to your contacts, or you might have an automated message rule that is sending too much. Skipped deliveries represent missed conversion opportunities, so you'll want to review your sending process to try and prevent skipped deliveries from occurring.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
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<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Skipped (Onboarding)</td>
<td>The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time.</td>
<td>The onboarding (skipped) metric is important for two reasons. First, it lets you know about any contacts that could not be sent to. Second, it gives you an indication of how the contacts you are importing are affecting your account. If you are continually seeing a high number of contacts skipped due to onboarding, it could mean you are trying to import a bad list. If you are importing a healthy list, contacts should very quickly move from onboarding to active.</td>
</tr>
<tr>
<td>Soft Bounce (email)</td>
<td>Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.</td>
<td>The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td>Spam Bounce</td>
<td>This is the number of times a message was rejected due to the email server identifying the email as spam.</td>
<td>If you see a number of these, look at the message content and run your message through a spam test.</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups</td>
</tr>
<tr>
<td>Undeliverable (email)</td>
<td>The email undeliverable metric represents the number of sent emails that were not delivered.</td>
<td>The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.</td>
</tr>
</tbody>
</table>
### Unsubscribes

The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.

It's important because it helps clarify why you're losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.

### Report Open Metrics

The **Opens** tab on a report provides metrics related to message opens.

**Important:** Your account must have Order Service enabled.

This is a good place to look if you want to get a better understanding of when and where a message is opened. Knowing what geographical areas a message connects with, or what type of email client your contacts open the message on, can help you make more sophisticated message design decisions and better choices about how you segment your contacts for sending.

The **Opens** tab is divided into five areas, each with a distinct label. We've broken up this help topic into sections based on those areas to make information easier to find. Every metric from every area of this tab can be found in the table at the end of this help topic.

#### Summary

This section offers a quick glance at the metrics that are related to counts, i.e. how many times did something happen. For opens, the overview includes a break down of how many messages were delivered vs how many were opened. Average opens is the average number of times emails you sent were opened.

- **691** Delivered
- **27** Unique Opens
- **51** Total Opens
- **2** Average Opens

#### Rates

This section provides the open rate, which is the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. The open rate lets you see what percentage of the contacts who received the email took the time to open it. All of your sending options can have an affect on your open rate.
Metrics By Hour

This section is a visual representation of what time of day contacts opened the message. It is representative of all-time data and does not take date filter settings into account. Knowing the time of day contacts frequently open a message can inform smart decisions when sending to these contacts in the future.

Performance By Email Client

This section provides a filterable graph that can be used to see what email clients your contacts used to open the message. You can view up to the top 10 most popular clients that were used. Click the filter icon and click on a client to either add or remove it from the graph.

The information in this graph is cumulative and does not change when you adjust the date filter for the report.
Opens By Geography

This section provides a visual representation of where contacts were when they opened the message. Areas with open metrics are green. You can mouse over a green area to see the number of opens. The darker the shade of green, the higher the open counts are.

You can:

• Click on an area with metrics to zoom in or use the plus/minus icons to change the zoom level.
• Click and drag to change the visible area of the map. As the focus of the map is narrowed, the area the metrics are associated with becomes more specific. At first (when the entire world is visible) metrics are associated with a country. But if you zoom in, any metrics you have for a country will be associated with their appropriate state/region. For example, if you have 1000 opens for Canada, when you zoom in so Canadian provinces are visible, these 1000 opens will be spread across the appropriate province.
• Hold the Cmd button and click to see open metrics for different countries at the same time in a Total Opens by Region list.
**All Opens Tab Metrics**

All of the metrics from every section of this tab are listed below in alphabetical order.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Opens</td>
<td>The average opens metric represents the average number of times sent emails were opened. For example, if there are 20 total opens and 5 opens are recorded, then the average opens would be 4.</td>
<td>The average opens metric is important because it represents an initial level of average interaction with emails you send. It can also signify that the subject line is effective and the from name is trusted. To determine how effective the average opens number really is, compare the average opens metric to clicks. If your average opens number is really high and you aren't seeing many clicks, then you might want to reconsider message design.</td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Total Opens</strong></td>
<td>The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric. <strong>Note:</strong> The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see Opens Metric on page 882.</td>
<td>The opens metrics is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Unique Opens</strong></td>
<td>The unique opens metric is the sum of all the unique opens recorded for a message. A unique open is recorded the first time a contact opens a message.</td>
<td>This is important because it helps you better understand the relationship between opens and clicks/conversions. The click rate compares that total opens metric with the total clicks metric. You can compare the number of unique opens to the number of click to see the rate at which the number of contacts who open a message click a link.</td>
</tr>
</tbody>
</table>

**Report Clicks Metrics**
The **Clicks** tab on a report provides metrics related to message clicks.
Important: Your account must have Order Service enabled.

The **Clicks** tab is a good place to dig into contact engagement. You need to know if, and how, contacts engage with your messages. Here you can see if many contacts are clicking links in your messages or if a few contacts are clicking links many times, what links are engaged with the most, and measure how clicks compare to opens and conversions.

The **Clicks** tab is divided into four areas, each with a distinct label. We've broken up this help topic into sections based on those areas to make information easier to find. Every metric from every area of this tab can be found in the table at the end of this help topic.

**Summary**

This section offers a quick glance at the metrics that are related to counts, i.e. how many times did something happen.

<table>
<thead>
<tr>
<th>69</th>
<th>25</th>
<th>3</th>
<th>51</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Clicks</td>
<td>Unique Clicks</td>
<td>Average Clicks</td>
<td>Total Opens</td>
</tr>
</tbody>
</table>

**Rates**

This section breaks down the percentages for you. The click rate is a comparison of number of unique clicks to number of unique opens and the click through rate is a comparison of number of clicks to number of delivered messages. See the metrics table below for more detailed information about what these metrics mean and why they are important.

<table>
<thead>
<tr>
<th>20%</th>
<th>5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click Rate</td>
<td>Click Through Rate</td>
</tr>
</tbody>
</table>

**Comparisons**

This section provides a visual comparison of rates against each other. It's a way to quickly see if there are any issues that need to be addressed. Each metric is represented by a different color on the circle and you can mouse over the segments of the circle to focus on a segment.
## COMPARISONS

<table>
<thead>
<tr>
<th>Comparison</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Opens vs Total Clicks</strong></td>
<td>This helps you see if contacts who open your messages are engaging with them. If <em>Total Clicks</em> is a small segment compared to the <em>Total Opens</em> segment, you might want to reconsider message design choices. Because <em>Total Clicks</em> includes all of the clicks, it's possible this number might be higher than total opens if the contacts who opened the message clicked on multiple links.</td>
</tr>
<tr>
<td><strong>Open Rate vs Click Rate</strong></td>
<td>The <em>Open Rate</em> is the percentage of delivered messages that were opened and the <em>Click Rate</em> is the percentage of opened messages that were engaged with. The comparison of these metrics can inform sending and design decisions. If a high percentage of contacts are opening but not engaging with your message, reconsider design decisions within the message. If a low percentage of contacts open your message but a high percentage who do open are engaged, consider your sending options.</td>
</tr>
<tr>
<td><strong>Total Clicks vs Unique Clicks</strong></td>
<td>This can help you understand if the engagement with the message is from a few contacts clicking links many times or if it's from many contacts clicking links. Because <em>Total Clicks</em> can be skewed either by a single contact repeating engagement with the same link or by engaging with multiple links, you will need to dig into the link performance metrics to draw conclusions about what this comparison means for this message.</td>
</tr>
<tr>
<td><strong>Total Clicks vs Conversions</strong></td>
<td>This helps you see if contacts who click on a link are following through with a conversion.</td>
</tr>
</tbody>
</table>
Link Performance

This is where you can see the engagement and performance metrics for each link in the message. Understanding link engagement not only helps you to understand what your contacts are interested in, but it can also provide insight into how message layout design decisions impacts engagement. For example, if you see a high or low number of clicks for a link, you can open the links heat map on the Links tab to see where this link is in your message.

Note: This section is not available on an Email Performance Report.

To add or remove a metric from this table, click the filter icon then click on the metric.

You can also use this table to change any link in a delivery that has already been scheduled by clicking the pencil icon and editing the link. When you repair a link, the link is updated in:

- All previously sent deliveries of the message.
- Deliveries that are in the process of sending.
- Deliveries that were scheduled to send before the link was repaired.

To export the link performance table, click the export icon then choose whether to export in CSV or Excel format.

All Click Tab Metrics

All of the metrics from every section of this tab are listed below in alphabetical order.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Clicks</td>
<td>The average clicks metric represents the average number of times a link was clicked in an email. For example, if your email has 20 total clicks and 5 clicks, then the average clicks would be 4.</td>
<td>It is important because it can represent a high or low level of average interaction with your email. It can also signify whether message content is effective at engaging your contacts.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Click Through Rate</strong></td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link. <strong>Tip:</strong> The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Orders</strong></td>
<td>The number of unique orders that are associated with the message.</td>
<td>This is important because it lets you compare the number of orders to the revenue and revenue per email metrics to determine if revenue is coming from a high volume of orders or from a small volume of high-revenue orders.</td>
</tr>
<tr>
<td><strong>Revenue</strong></td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Total Clicks</strong></td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups.</td>
</tr>
<tr>
<td><strong>Total Opens</strong></td>
<td>The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Exemple opens an email you sent them 5 times, and contact Jayne Exemple opens an email you sent them 10 times, then 15 would be recorded for the total opens metric. <strong>Note</strong>: The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see Opens Metric on page 882.</td>
<td>The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Unique Clicks</strong></td>
<td>The unique clicks metric is the sum of all the unique clicks recorded for a message. A unique click is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded. This metric considers all of the links in a message as a whole. For information about the number of unique clicks for an individual link, see the Unique Clicks By Link metric on the Delivery Report Links tab.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>% of Orders</td>
<td>This metric represents the percentage (per link) of the total orders placed from a delivery.</td>
<td>Percent of orders is important because it gives insight into which links are contributing a higher percentage of orders from the delivery. Links that have low percentages may be placed in non-obvious locations or have less optimal titles, which can help you when looking to iterate on new email layout designs.</td>
</tr>
</tbody>
</table>

**Report Conversion Metrics**

The Conversion tab on a report provides detailed information about message conversions.

⚠️ **Important:** Your account must have Order Service enabled.

The Conversion tab is a good place to dig into contact engagement and RFM metrics. You need to know if, and how, contacts engage with your messages. Here you can see if many contacts are clicking links in your messages or if a few contacts are clicking links many times, what links are engaged with the most, and measure how clicks compare to opens and conversions.

The Conversion tab is divided into three areas, each with a distinct label. We've broken up this help topic into sections based on those areas to make information easier to find. Every metric from every area of this tab can be found in the table at the end of this help topic.

**Overview**

This section provides the total number of conversions, the total number of orders that have been processed, how much revenue these orders generated, and the average amount of money spent per order.

| 19 Conversions | 230 Processed Orders | $265,513.08 Total Revenue | $1,154.40 Avg. Order Value |

**Rates**

This section provides a look at the percentage of clicks that resulted in conversions (conversion rate) and a comparison of total clicks vs unique clicks. The **Total Clicks vs Unique Clicks** comparison can help you understand if the engagement with the message is from a few contacts clicking links many times or if it's from many contacts clicking links. This, in turn, can indicate if conversions are being generated by a few contacts or many contacts.
Orders (All Time)

This is a list of all orders that match the currency filter set for the report. The details for each order are listed in the table. To add or remove an order detail column from this table, click the filter icon then click on the order detail. You can also view all orders, regardless of the report's currency settings, by enabling the Show All (Disable Currency Filter) checkbox.

Note: This section is not available on an Email Performance Report.

Because order details are not metrics, they are not listed in the metrics table below. For more information about any of the order details see Order Fields / Order Details on page 1025.

You can click on any order to see the full details of the order, including detailed shipping and line item information.

To export the Orders (All Time) table, click the export icon then chose whether to export in CSV or Excel format. The export file will only contain the order details that are included in the table (selected in the filter).
# All Conversion Tab Metrics

All of the metrics from every section of this tab are listed below in alphabetical order.

Because order details are not metrics, the order details included in the **Orders (All Time)** area are not listed in the metrics table. For more information about any of the order details see **Order Fields / Order Details** on page 1025.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Order Value (AOV)</strong></td>
<td>This metric represents the average revenue generated per order tracked in your account.</td>
<td>It's important because it gives you an understanding of how much contacts spend, on average, each time an order is placed.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <strong>Configure Order Settings</strong> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Processed Orders</td>
<td>The processed orders metric are the number of orders that have been placed and processed (are no longer pending.)</td>
<td>This is important because it lets you compare the number of orders to the revenue and revenue per email metrics to determine if revenue is coming from a high volume of orders or from a small volume of high-revenue orders.</td>
</tr>
<tr>
<td>Revenue / Total Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups.</td>
</tr>
<tr>
<td>Unique Clicks</td>
<td>The unique clicks metric is the sum of all the unique clicks recorded for a message. A unique click is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
</tbody>
</table>

**Report Devices Metrics**

The Devices tab on a report provides insight into what types of devices your contacts use to read your messages.

**Important:** Your account must have Order Service enabled.

Knowing what devices your contacts use to engage with your messages can save time and effort when designing and testing messages and organizing your marketing campaigns. While you want to make your messages accessible to a broad audience, understanding the percentage of contacts who use mobile devices vs desktop can help you make the right choices when unavoidable design compromises need to be made.

The Devices tab is divided into three areas, each with a distinct label. We've broken up this help topic into sections based on those areas to make information easier to find. Every metric from every area of this tab can be found in the table at the end of this help topic.
Summary
This section offers a quick glance at the metrics that are related to different types of devices. Devices include:

- **Desktop** is engagement from all desktop and laptop computers.
- **Phone** is engagement from all mobile phones.
- **Tablet** is engagement from tablet-sized device. (Larger than a phone, smaller than a laptop.)
- **Other** is engagement from PDAs, game consoles, smart TVs, wearable computers (smart watches), and unrecognizable devices.

<table>
<thead>
<tr>
<th>Source</th>
<th>Unique Opens</th>
<th>Unique Clicks</th>
<th>Open Rate</th>
<th>Click Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop</td>
<td>2,465</td>
<td>551</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>Phone</td>
<td>1,897</td>
<td>842</td>
<td>23%</td>
<td>44%</td>
</tr>
<tr>
<td>Tablet</td>
<td>514</td>
<td>231</td>
<td>6%</td>
<td>45%</td>
</tr>
<tr>
<td>Other</td>
<td>399</td>
<td>2</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5,275</strong></td>
<td><strong>1,626</strong></td>
<td><strong>63%</strong></td>
<td><strong>31%</strong></td>
</tr>
</tbody>
</table>

To export the summary metrics, click the export icon then chose whether to export in CSV or Excel format. All of the counts in the section can also be viewed in the Performance Over Time graph.

Comparisons
This section provides a visual comparison of opens, clicks, conversions, and revenue by device. It's a way to quickly see trends and if there are any issues that might need to be addressed. Each device is represented by a different color on the circle and you can mouse over the segments of the circle to focus on that segment.
**Comparison** | **Description**
--- | ---
*Total Opens* | This lets you quickly see how contacts open the messages they're sent.

*Total Clicks* | This lets you quickly see what devices contacts tend to use when they open messages. You can compare this to the *Total Opens* metrics to see if people tend to engage more frequently when they're on a certain type of device.

*Conversions* | This lets you quickly see what devices contacts tend to use when they convert. Comparing this with the *Total Clicks* metrics can help you understand if your message is easier to convert from via different devices. It can also provide insight into how easy, or not easy, to use your site is depending on the type of device contacts use to convert.

*Revenue* | The revenue metric comparison can be used to make decisions about campaign segmentation; do contacts who use a certain type of device spend more?

**Performance Over Time**

This section provides a configurable graph that can be used to:

- View counts, rates, and revenue metrics by device at different points in time.
- See time-based trends for individual metrics.
- Visually compare different metrics, and their trends, against each other.

You can view any count, rate, or revenue metrics for a device on this graph. Count and revenue metrics are represented using a line graph and rate metrics are represented with bar graphs. Each metric is color coded and the guide for metrics currently represented on the graph are provided in the legend below the graph. Click the filter icon and click on the radio button for a device and metric combination to either add or remove it from the graph.
You can mouse over the graph to see the visible metrics at different points in time.

The time range shown is the length of time set for the report. You can change this by clicking the calendar icon and settings a different report range. When you do this, all of the other metrics on the report will also be updated.

**All Devices Tab Metrics**

All of the metrics from every section of this tab are listed below in alphabetical order.

Remember, when looking at metrics on this tab, these metrics are specific to the type of device contacts used. Open rate, for example, is the open rate for the associated device. So if the open rate for desktop is 3%, then 3% of all contacts who received a message opened the message on a desktop computer.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Order $ (AOV)</td>
<td>This is a comparison of the number of orders to the total revenue.</td>
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<td>Metric</td>
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<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
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<td>The Email Revenue metric is important because it allows you to see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Revenue Per Email</td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks you are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups.</td>
</tr>
<tr>
<td>Total Opens</td>
<td>The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.</td>
<td>The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Unique Clicks</td>
<td>The unique clicks metric is the sum of all the unique clicks recorded for a message. A <em>unique click</em> is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unique Opens</td>
<td>The unique opens metric is the sum of all the unique opens recorded for a message. A unique open is recorded the first time a contact opens a message.</td>
<td>This is important because it helps you better understand the relationship between opens and clicks/conversions. The click rate compares that total opens metric with the total clicks metric. You can compare the number of unique opens to the number of click to see the rate at which the number of contacts who open a message click a link.</td>
</tr>
</tbody>
</table>

**Message Report Deliveries Metrics**

The **Deliveries** tab on a message report provides a list of the deliveries associated with the message and the high-level metrics associated with each delivery.

⚠️ **Important:** Your account must have Order Service enabled.

This allows you to quickly see if there are any positive or negative variations in the metrics for a particular delivery.

To dig in deeper, click the report icon to access the full delivery report for a delivery.

<table>
<thead>
<tr>
<th>DELIVERIES</th>
<th>Subject</th>
<th>Delivery Type</th>
<th>Send Date</th>
<th>Total Subscriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Single Contact</td>
<td>03/15/2017 3:10 AM</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Single Contact</td>
<td>03/15/2017 3:10 AM</td>
<td>110</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Single Contact</td>
<td>03/14/2017 3:10 AM</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Single Contact</td>
<td>03/14/2017 3:10 AM</td>
<td>86</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Single Contact</td>
<td>03/13/2017 3:10 AM</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Single Contact</td>
<td>03/12/2017 3:10 AM</td>
<td>110</td>
</tr>
</tbody>
</table>

To add or remove a metric from this table, click the filter icon then click on the metric. You can also export the deliveries table by clicking the export icon then choosing whether to export in CSV or Excel format. Only metrics displayed in the table will be exported.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Order Value (AOV)</td>
<td>This represents the average amount of revenue recorded for the contact when they place an order.</td>
<td>It is important because it provides insight into how much contacts are spending, on average, each time an order is made.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Click Rate  | The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: *Click to Open Rate (CTO)*  
  The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range. | The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are. |
<p>| Delivered   | The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: <em>Accepted</em>                                                                 | The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent. |
| Delivery Rate | The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: <em>Accepted Rate</em>                                                                 | The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you. |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Type</td>
<td>The delivery Type represents the type of send. Each type is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• <em>Normal</em> - The <em>Normal</em> email delivery type represents a regular email delivery sent to more than one contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Bulk</em> - The <em>Bulk</em> email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Skipped</em> - The <em>Skipped</em> email delivery type represents email messages that were skipped by Bronto and not sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Single Contact</em> - The <em>Single Contact</em> email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as <em>Single Contact</em>, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Test</em> - The <em>Test</em> email delivery type represents email deliveries that were sent as test deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>AMR</em> - The <em>AMR</em> email delivery type represents email deliveries that were sent via an <em>Automated Message Rule</em>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Split Group</em> - The <em>Split Group</em> email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the <em>Split Group</em> text, a tool-tip will appear that contains the name of the split group.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>FTAF</em> - The <em>Forwards to a Friend</em> email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Transactional</em> - The <em>Transactional</em> email delivery type represents email deliveries were sent as transactional emails.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <strong>Render Rate</strong> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The <strong>Revenue Per Email</strong> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <strong>Revenue Per Email</strong> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td><strong>Recipients</strong></td>
<td>Indicates how many lists and/or segments the delivery was sent to.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Indicates if the delivery was successful.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Total Sends</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
</tbody>
</table>

**Note:** Deleted email deliveries will still be counted as part of the emails sent metric.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Clicks</strong></td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups</td>
</tr>
</tbody>
</table>
| **Total Opens** | The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.  

> Note: The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see [Opens Metric](#) on page 882. | The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them. |
<p>| <strong>Total Revenue</strong> | The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.                                         | The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.                                          |
| <strong>Unique Clicks</strong> | The unique clicks metric is the sum of all the unique clicks recorded for a message. A unique click is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded. | This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert. |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Opens</td>
<td>The unique opens metric is the sum of all the unique opens recorded for a message. A unique open is recorded the first time a contact opens a message.</td>
<td>This is important because it helps you better understand the relationship between opens and clicks/conversions. The click rate compares that total opens metric with the total clicks metric. You can compare the number of unique opens to the number of click to see the rate at which the number of contacts who open a message click a link.</td>
</tr>
</tbody>
</table>

**Delivery Report Heat Map Metrics**

The Heat Map tab on a delivery report provides a heat map where a link engagement metrics are overlayed on top of your message.

**Important:** Your account must have Order Service enabled.

When a link has a metric associated with it, the metric is displayed over the link in a circle. The circle color and size indicate how successful the link was in relation to other links in the message:

- Small, red circles represent lower engagement.
- Medium, orange/yellow circles represent moderate engagement.
- Large, green circles represent higher engagement.

The circle on the heat map displays one metric at a time. Click the filter icon, then click on a metric, to change what is displayed. If there is no circle then the link doesn't have the selected metric associated with it.

You can click on the clicks icon to see a breakdown of all metrics associated with that link.

Understanding how clicks relate to message design can help you make more informed design decisions in the future. Did a link have a high number of clicks but a low conversion rate? This could mean that the message design was compelling but didn't clearly communicate the product you're promoting.

All of the metrics associated with links are in the following table.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Click Rate by Link</strong></td>
<td>The click rate represents the number of clicks that were recorded for a link, as compared to the number of opens recorded.</td>
<td>The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Orders</td>
<td>The number of unique orders that are associated with the message.</td>
<td>This is important because it lets you compare the number of orders to the revenue and revenue per email metrics to determine if revenue is coming from a high volume of orders or from a small volume of high-revenue orders.</td>
</tr>
<tr>
<td>Revenue</td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks you are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups</td>
</tr>
<tr>
<td>Total Opens</td>
<td>The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.</td>
<td>The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
</tbody>
</table>

Note: The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see [Opens Metric](#) on page 882.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Unique Clicks By Link</em></td>
<td>The unique clicks by link metric is the sum of all the unique clicks recorded for a link. A <em>unique click</em> is recorded the first time a contact clicks the link. If a contact clicks the link 9 times, 1 unique click is recorded. If 2 contacts each click the link 10 times, then 2 clicks are recorded. If a single contact clicks all 5 links in a message, than 1 unique click is recorded for this link. This metric is different from the <em>Unique Clicks</em> metric because it only considers clicks for a single link. If a contact clicks a different link before this link, it will not be counted in the <em>Unique Clicks</em> metric but it will be counted in the <em>Unique Clicks By Link</em> metric.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
<tr>
<td><em>% of Orders</em></td>
<td>This metric represents the percentage (per link) of the total orders placed from a delivery.</td>
<td>Percent of orders is important because it gives insight into which links are contributing a higher percentage of orders from the delivery. Links that have low percentages may be placed in non-obvious locations or have less optimal titles, which can help you when looking to iterate on new email layout designs.</td>
</tr>
</tbody>
</table>

**Delivery Report Recipients Metrics**

The *Recipients* tab on a delivery report contains all of the list or segment metrics associated with an individual delivery.

**Important**: Your account must have Order Service enabled.

You can access a delivery recipient metrics by going to *Messages > Deliveries* and clicking the report icon, then clicking on the delivery report's *Recipients* tab. The tab contains a single, exportable table that has an entry for each list or segment included in the delivery and their associated metrics.

To add or remove metrics:

1. Click the filter icon.
2. Click the checkbox.

A check mark means the metric is displayed in the table.

The *Recipients* tab provides insight into delivery behavior at the list/segment level. Therefore, contact metrics are associated with every list or segment the contact was a part of at the time of the delivery. This duplication of contact-level metrics means the sum of metrics in this table could be higher than what is reported in other areas of the delivery report. For example, a contact who is on two different segments opened the delivery. This open is reflected in the *Open Rate* for each segment, but will only be reflected once in the *Open Rate* on other tabs within the delivery report.

To export the table:
1. Click the export icon ‡ .
2. Select whether to export in CSV or Excel format.

This table describes all of the recipient metrics.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Order Value (AOV)</strong></td>
<td>This metric represents the average revenue generated per order tracked in your account.</td>
<td>It's important because it gives you an understanding of how much contacts spend, on average, each time an order is placed.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. Tip: In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range. The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
<td></td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent. The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------</td>
<td>----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Orders</td>
<td>The number of unique orders that are associated with the message.</td>
<td>This is important because it lets you compare the number of orders to the revenue and revenue per email metrics to determine if revenue is coming from a high volume of orders or from a small volume of high-revenue orders.</td>
</tr>
<tr>
<td>Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you to see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Recipient Name</td>
<td>Name of the list or segment.</td>
<td>N/A</td>
</tr>
<tr>
<td>RPE</td>
<td>The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The Revenue Per Email metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td>Sends</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Total Opens</td>
<td>The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex opens an email you sent them 5 times, and contact Jayne opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.</td>
<td>The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Type</td>
<td>Whether the group is a segment or list.</td>
<td>N/A</td>
</tr>
<tr>
<td>Unique Clicks</td>
<td>The unique clicks metric is the sum of all the unique clicks recorded for a message. A unique click is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
<tr>
<td>Unique Opens</td>
<td>The unique opens metric is the sum of all the unique opens recorded for a message. A unique open is recorded the first time a contact opens a message.</td>
<td>This is important because it helps you better understand the relationship between opens and clicks/conversions. The click rate compares that total opens metric with the total clicks metric. You can compare the number of unique opens to the number of click to see the rate at which the number of contacts who open a message click a link.</td>
</tr>
</tbody>
</table>

**A/B Split Report Split Groups Metrics**

The **Split Groups** tab on a split report provides a lists of the split groups associated with the A/B Split test and the high-level metrics associated with each group.
Important: Your account must have Order Service enabled.

This allows you to quickly compare the metrics between your split group deliveries. To dig in deeper, click the group name to access the full delivery report for a split group.

<table>
<thead>
<tr>
<th>Name</th>
<th>Subject</th>
<th>Status</th>
<th>Recipients</th>
<th>Send</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group A</td>
<td></td>
<td>Successful</td>
<td>9 Segments</td>
<td>03/07</td>
</tr>
<tr>
<td>Group B</td>
<td></td>
<td>Successful</td>
<td>9 Segments</td>
<td>03/07</td>
</tr>
<tr>
<td>Winner</td>
<td></td>
<td>Successful</td>
<td>9 Segments</td>
<td>03/07</td>
</tr>
</tbody>
</table>

To add or remove a metric from this table, click the filter icon then click the metric. You can also export the split groups table by clicking the export icon then choosing whether to export in CSV or Excel format. Only metrics displayed in the table will be exported.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Order Value (AOV)</td>
<td>The average order value is a comparison of the number of orders to the total revenue.</td>
<td>This is important because it provides insight into how much contacts are spending, on average, each time an order is placed.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contact Loss Rate</td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td><strong>Recipients</strong></td>
<td>Indicates how many lists and/or segments the delivery was sent to.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Send Date</strong></td>
<td>This is the date the delivery occurred.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Indicates if the delivery was successful.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Total Sends</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <em>Note:</em> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
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<tr>
<td>Metric</td>
<td>Description</td>
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</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
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<tr>
<td>Unique Clicks</td>
<td>The unique clicks metric is the sum of all the unique clicks recorded for a message. A unique click is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
<tr>
<td>Unique Opens</td>
<td>The unique opens metric is the sum of all the unique opens recorded for a message. A unique open is recorded the first time a contact opens a message.</td>
<td>This is important because it helps you better understand the relationship between opens and clicks/conversions. The click rate compares that total opens metric with the total clicks metric. You can compare the number of unique opens to the number of click to see the rate at which the number of contacts who open a message click a link.</td>
</tr>
</tbody>
</table>

**Related Topics**

- **A/B Split Tests** on page 321
  A/B split tests allow you to automate the tedious steps of testing different message types and provide access to valuable testing data with a minimal investment of your time.

- **Send An A/B Split Test** on page 323
  You can use an A/B winner split test to automatically send the most successful message.

**Schedule Report Exports**

You can schedule report exports to run at a certain time or schedule recurring report exports.
1. Find the report you want to schedule exports for.
2. Configure your report export.
3. Click on the Scheduling tab.
4. Choose to export the report immediately or to schedule your report export for a specific date and time.
5. If you choose Export at a Specific Date & Time, select a specific date and a specific time to export your report.
6. Optional: Click the Repeat checkbox to have the report export repeat at a specified interval.
   The repeat options are:
   • Daily: Choose a number from 1-31. For example, if you pick 20, the report export will run every 20 days.
   • Weekly: The report will export every week based on the date you set in the Date section.
   • Monthly: Enter the monthly interval for your report export to run. For example, every 3 months. You can also set a specific day of the month to run the report export.
   • Yearly: Select a month and day of the year for your report export to run.
   a) For End Date, choose when you want your recurring report exports to end.
      Choose from:
      • Never- The report export will run indefinitely.
      • Specific Date- Choose the date you want the recurring report exports to stop.
      If you do not choose an End Date, the report exports will end a year after the schedule date.
7. Click Export.
   Note: You can only have up to 10 scheduled exports at one time.

New Reports' Summary Reports Exports
You can export report data to share with team members or to keep for your own records.
You can export report data to a .csv or .xlsx file.
You can export Delivery, Message, Split Group, Segment, List, and Email Performance reports.
1. Find the report you want to export.
2. Click Export.
   The Report Export panel opens.
3. Name the report export.
4. For Report Type, choose the type of report you want to export.
   These options will change, depending in the report your are exporting.

<table>
<thead>
<tr>
<th>Report</th>
<th>Report Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Report</td>
<td>• Delivery Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing all of the metrics for a single delivery.</td>
</tr>
<tr>
<td>Message Report</td>
<td>• Delivery Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing all of the metrics for each delivery of a single message.</td>
</tr>
<tr>
<td></td>
<td>• Message Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing the aggregate metrics for a single message.</td>
</tr>
</tbody>
</table>
Report

<table>
<thead>
<tr>
<th>Report</th>
<th>Report Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Split Group Report</td>
<td>• Delivery Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing all of the metrics for each</td>
</tr>
<tr>
<td></td>
<td>delivery of a single split group.</td>
</tr>
<tr>
<td></td>
<td>• Split Group Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing the aggregate metrics for a</td>
</tr>
<tr>
<td></td>
<td>single split group.</td>
</tr>
<tr>
<td>Segment Report</td>
<td>• Segment Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing the aggregate metrics for a</td>
</tr>
<tr>
<td></td>
<td>single segment.</td>
</tr>
<tr>
<td>List Report</td>
<td>• List Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing the aggregate metrics for a</td>
</tr>
<tr>
<td></td>
<td>single list.</td>
</tr>
<tr>
<td>Email Performance Report</td>
<td>• Delivery Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing all of the metrics for each</td>
</tr>
<tr>
<td></td>
<td>delivery from your site.</td>
</tr>
<tr>
<td></td>
<td>• Message Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing all of the metrics for each</td>
</tr>
<tr>
<td></td>
<td>message from your site.</td>
</tr>
<tr>
<td></td>
<td>• Email Performance Summary</td>
</tr>
<tr>
<td></td>
<td>Report containing the aggregate metrics for all</td>
</tr>
<tr>
<td></td>
<td>deliveries from your site.</td>
</tr>
</tbody>
</table>

5. For **Data Settings**, the checkbox for **Include Device-Level Metrics** is enabled by default. If you do not want device-level metrics, uncheck this box.

6. Choose from a CSV or Excel (XSLX) file for your report file format.

7. For **Date Range**, select a date range that you want to report data for. Your report will only include data for events that occur in the selected data range. For example, a Message Report will only include send, open or click data if send, open, or click events occurred within your specified date range. It is possible to have zero sends or deliveries, while still seeing opens, clicks, etc. since the sends may not have occurred in your selected date range.

8. Select a **Currency** for your report. This will include RFM metrics based on orders that came in that particular currency.

   **Note:** You cannot have more than one currency in a report. To get a report with a different currency, you will need to complete another report export.

9. Click the **Scheduling** tab to **schedule your report export**.

10. Click **Export**.

   A confirmation window will pop up, telling you that your report is running. Click **OK**. An email will be sent to you when it is ready to **download**.

**New Reports Detailed Contact Report Export**

You can export a Detailed Contact Report that contains every action taken by every contact involved in a delivery or deliveries.

Reports can be exported immediately or automatically at time intervals of your choosing.

If you limit a message report to only show deliveries from a specific date range when you download a detailed or summary report, the downloaded report only contains metrics for the deliveries made within the specified date range.
To export a report:

1. Find the report you want to export.
2. Click Export.
3. For Date Range, select a date range that you want to report data for.
   Your report will only include data for events that occur in the selected data range. For example, a Message Report will only include send, open or click data if send, open, or click events occurred within your specified date range. It is possible to have zero sends or deliveries, while still seeing opens, clicks, etc. since the sends may not have occurred in your selected date range.

   Report Name and Currency are not supported for this report.
4. For Report Type, select Detailed Contact Report.
5. Select which Contact Status metrics you want to include.
   You can select:
   • All
   • Sent
   • Delivered
   • Undeliverable
   • Opens
   • Click Throughs
   • Conversions
   • Forwards To A Friends
   • Updates
   • Unsubscribes
   • Frequency Caps
   • Onboarding Skipped
6. Choose which Data Settings to include.
   • Fields
   • GeoIP/Technology Data
   • RFM Metrics
   Device-level metrics is not supported for this report.

   Note: This report can only be exported as a .csv file.
7. Click the Scheduling tab to schedule your report export.
8. Click Export.
   The Detailed Contact Report download link appears in the Email and Detailed Contact Reports section of the Legacy Downloads page.

New Reports' Downloads Page

The Downloads page is where you can go to find information about scheduled and completed report exports.

When your reports are finished exporting, you will be directed to the Downloads page via an email link or in-app notification. You can also access the page by navigating to Reports > Report Downloads.

Reports on this page are divided into 2 sections. The first section shows report exports that are scheduled.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the report.</td>
</tr>
<tr>
<td>Format</td>
<td>The format of the file, either .csv or .xlsx.</td>
</tr>
<tr>
<td>Last Modified</td>
<td>The date the report export schedule was last updated.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>Next Run</td>
<td>The date when the report export will run next.</td>
</tr>
<tr>
<td>End Date</td>
<td>The date when the report export will end.</td>
</tr>
</tbody>
</table>

The second section shows report exports that are completed.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name</td>
<td>The name of the report.</td>
</tr>
<tr>
<td>Format</td>
<td>The format of the file, either .csv or .xlsx.</td>
</tr>
<tr>
<td>Size</td>
<td>The size of the downloaded file.</td>
</tr>
<tr>
<td>Created</td>
<td>The date the report was created.</td>
</tr>
<tr>
<td>Completed</td>
<td>The date the report was completed.</td>
</tr>
<tr>
<td>Expires On</td>
<td>The date the report will be deleted from Bronto.</td>
</tr>
</tbody>
</table>

You can perform 3 actions on this page:
- Download a report: downloads the report to your machine
- View a report: opens the report in Bronto
- Delete a report: deletes the report from Bronto

To perform any of these 3 actions:
1. Click the box next to the report.
2. Click the corresponding icon to download, view, or delete the report.

**Downloaded Report Content**
After you download your exported report, it will contain certain core metrics.

Each report is a summary report, with the metrics as column headers. Depending on the type of report you exported, deliveries, messages, segments, etc. are separated by row.

**Note:** When your report includes device-level metrics, the report contains additional metrics broken out by Desktop, Phone, Table, and Other device types. Device-level metrics are: Total Opens, Unique Opens, Open Rate, Total Clicks, Unique Clicks, Click Rate, Conversions, Conversion Rate, Orders, Total Revenue, RPE, and AOV.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery Type</strong></td>
<td>The delivery Type represents the type of send. Each type is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td>Normal</td>
<td>The Normal email delivery type represents a regular email delivery sent to more than one contact.</td>
<td></td>
</tr>
<tr>
<td>Bulk</td>
<td>The Bulk email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.</td>
<td></td>
</tr>
<tr>
<td>Skipped</td>
<td>The Skipped email delivery type represents email messages that were skipped by Bronto and not sent.</td>
<td></td>
</tr>
<tr>
<td>Single Contact</td>
<td>The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.</td>
<td></td>
</tr>
<tr>
<td>Test</td>
<td>The Test email delivery type represents email deliveries that were sent as test deliveries.</td>
<td></td>
</tr>
<tr>
<td>AMR</td>
<td>The AMR email delivery type represents email deliveries that were sent via an Automated Message Rule.</td>
<td></td>
</tr>
<tr>
<td>Split Group</td>
<td>The Split Group email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.</td>
<td></td>
</tr>
<tr>
<td>FTAF</td>
<td>The Forwards to a Friend email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.</td>
<td></td>
</tr>
<tr>
<td>Transactional</td>
<td>The Transactional email delivery type represents email deliveries were sent as transactional emails.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sends</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
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</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Unique Opens</td>
<td>The unique opens metric is the sum of all the unique opens recorded for a message. A unique open is recorded the first time a contact opens a message.</td>
<td>This is important because it helps you better understand the relationship between opens and clicks/conversions. The click rate compares that total opens metric with the total clicks metric. You can compare the number of unique opens to the number of click to see the rate at which the number of contacts who open a message click a link.</td>
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<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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<tr>
<td><strong>Total Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent.</td>
</tr>
<tr>
<td><strong>Average Opens</strong></td>
<td>The average opens metric represents the average number of times sent emails were opened. For example, if there are 20 total opens and 5 opens are recorded, then the average opens would be 4.</td>
<td>The average opens metric is important because it represents an initial level of average interaction with emails you send. It can also signify that the subject line is effective and the from name is trusted. To determine how effective the average opens number really is, compare the average opens metric to clicks. If your average opens number is really high and you aren't seeing many clicks, then you might want to reconsider message design.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
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<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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</tr>
<tr>
<td><strong>Unique Clicks</strong></td>
<td>The unique clicks metric is the sum of all the unique clicks recorded for a message. A unique click is recorded the first time a contact clicks any link contained in a message. If a contact clicks a link 9 times, 1 unique click is recorded. If 2 contacts each click a link 10 times, then 2 clicks are recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.</td>
<td>This is important because it helps you better understand the relationship between clicks and conversions. The conversion rate compares the total number of clicks to the total number of conversions. You can compare the number of unique clicks to the number of conversions to see the rate at which the number of contacts who click a link convert.</td>
</tr>
<tr>
<td><strong>Total Clicks</strong></td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
<td>The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery groups</td>
</tr>
<tr>
<td><strong>Average Clicks</strong></td>
<td>The average clicks metric represents the average number of times a link was clicked in an email. For example, if your email has 20 total clicks and 5 clicks, then the average clicks would be 4.</td>
<td>It is important because it can represent a high or low level of average interaction with your email. It can also signify whether message content is effective at engaging your contacts.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
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<td>Metric</td>
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<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Orders</td>
<td>The number of unique orders that are associated with the message.</td>
<td>This is important because it lets you compare the number of orders to the revenue and revenue per email metrics to determine if revenue is coming from a high volume of orders or from a small volume of high-revenue orders.</td>
</tr>
<tr>
<td>Revenue/ Total Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Metric</td>
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<td>Why It's Useful</td>
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</tr>
<tr>
<td>Revenue Per Email</td>
<td>The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The Revenue Per Email metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td>Average Order Value (AOV)</td>
<td>The average order value is a comparison of the number of orders to the total revenue.</td>
<td>This is important because it provides insight into how much contacts are spending, on average, each time an order is placed.</td>
</tr>
<tr>
<td>Contact Updates</td>
<td>The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.</td>
<td>The contact updates metric is important because it allows you to see how many contacts updated their information via a manage preferences link contained in an email you sent them. If you notice that the contact updates number is high, you should dig a little deeper and find out what contacts are doing once they get to the manage preferences page. Depending on the actions they are taking on the manage preferences page, you may need to re-work the content of the email, or re-evaluate the list or segment you are sending to.</td>
</tr>
<tr>
<td>Contact Update Rate</td>
<td>This metric represents the percentage of contacts who updated information using a manage preferences link contained in the email compared to the number of contacts who were sent the email.</td>
<td>This is important because a high rate can reveal an issue with the accuracy of your contact data. If you notice that the contact updates number is high, dig a little deeper and find out what updates contacts make using the manage preferences page. Depending on these actions, you may need to rework the content of the email, or reevaluate the lists or segments you've sent to.</td>
</tr>
<tr>
<td>Contact Loss Rate</td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

Tip: For more information on adding a manage preferences link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on manage preferences webforms, see Types of Webforms on page 204.

Tip: For more information on the inactive status type, see Contact Status on page 1083.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
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</thead>
<tbody>
<tr>
<td>Unsubscribes</td>
<td>The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>It's important because it helps clarify why you're losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.</td>
</tr>
<tr>
<td>Unsubscribe Rate</td>
<td>The Unsubscribe Rate metric represents the percentage of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>The Unsubscribe Rate metric is important because it shows the rate at which contacts are unsubscribing. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric. You can monitor this metric overtime to see if changes to your sending habits are lowering the Unsubscribe Rate.</td>
</tr>
<tr>
<td>Hard Bounce (email)</td>
<td>Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.</td>
<td>The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td>Soft Bounce (email)</td>
<td>Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.</td>
<td>The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.</td>
</tr>
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<td>Metric</td>
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<td>Why It's Useful</td>
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<tr>
<td><strong>Spam Bounce</strong></td>
<td>This is the number of times a message was rejected due to the email server identifying the email as spam.</td>
<td>If you see a number of these, look at the message content and run your message through a spam test.</td>
</tr>
<tr>
<td><strong>Bounce Rate</strong></td>
<td>The bounce rate indicates the percentage of bounces (as compared to the number delivered) recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group.</td>
<td>The bounce rate metric is important because it gives you an idea of how your message is performing from a deliverability perspective. If the bounce rate is high, your sender/delivery rating will be negatively affected and contacts may not be receiving your message. The bounce rate rolls up all the types of bounces into one percentage. To determine what type of bounce occurred, you can view the following metrics which further classify and explain bounces:</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
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</tr>
<tr>
<td><strong>Skipped (Frequency Cap)</strong></td>
<td>The frequency cap (skipped) metric represents the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account.</td>
<td>There are several reasons why you might see a high number of emails skipped for exceeding your frequency cap settings. You could simply be scheduling too many deliveries to your contacts, or you might have an automated message rule that is sending too much. Skipped deliveries represent missed conversion opportunities, so you'll want to review your sending process to try and prevent skipped deliveries from occurring.</td>
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<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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<tr>
<td>Skipped (Onboarding)</td>
<td>The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time.</td>
<td>The onboarding (skipped) metric is important for two reasons. First, it lets you know about any contacts that could not be sent to. Second, it gives you an indication of how the contacts you are importing are affecting your account. If you are continually seeing a high number of contacts skipped due to onboarding, it could mean you are trying to import a bad list. If you are importing a healthy list, contacts should very quickly move from onboarding to active.</td>
</tr>
<tr>
<td>Complaints</td>
<td>The Complaint (From Complaint) metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.</td>
<td>The Complaint (From Complaint) metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP or via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application.</td>
</tr>
<tr>
<td>ISP Feedback Loop</td>
<td>The From Complaint - ISP Feedback metric represents the number of contacts that were lost (made inactive) by complaining via an ISP feedback loop.</td>
<td>The From Complaint - ISP Feedback metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP. They can do this by clicking the Report Spam button (or similarly named button) after receiving an email from you.</td>
</tr>
</tbody>
</table>

**Warning:** A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see Sender and Delivery Rating on page 309.

**Tip:** For more information on fixing a low sender or delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.
<table>
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<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
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<tbody>
<tr>
<td><strong>Bronto Feedback Loop</strong></td>
<td>The <em>From Complaint - Bronto Feedback</em> metric represents the number of contacts that were lost (made inactive) by complaining via the application. A contact can complain using a Complaint webform.</td>
<td>The <em>From Complaint - Bronto Feedback</em> metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain the Complaint webform. They can do this by clicking the link to a Complaint webform in an email they receive from you.</td>
</tr>
<tr>
<td></td>
<td><strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see <a href="#">Sender and Delivery Rating</a> on page 309.</td>
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</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see <a href="#">Tips For Fixing A Low Email Sender/Delivery Rating</a> on page 311.</td>
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<tr>
<td></td>
<td><strong>Tip:</strong> For more information on Complaint webforms, see <a href="#">Types of Webforms</a> on page 204.</td>
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</tr>
<tr>
<td>Metric</td>
<td>Description</td>
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</tr>
<tr>
<td>Complaint Rate</td>
<td>The Complaint Rate metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.</td>
<td>The Complaint Rate is important because it better clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the Report Spam button (or similarly named button) after receiving an email from you.</td>
</tr>
<tr>
<td>Net Response Rate</td>
<td>Net Response Rate is a composite metric that represents open rate times click through rate times conversion rate.</td>
<td>This is important because it represents the most comprehensive performance of your email content as it relates to opens, click throughs, and conversions from end-to-end.</td>
</tr>
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</table>

**Legacy Reports**

**Report Types (Legacy)**

There are 8 primary types of reports that can be viewed individually, or compared to each other. These topics explain how the different reports relate to one another.

⚠️ **Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

Reports are designed in such a way that you can start at a broad scope, and drill-down to more specific levels of reporting.
Message, Delivery, And Delivery Recipient Reports

In the case of a message, you start very broad by viewing a message report. A message report is an aggregate of all the metrics for all the deliveries made using that message. Often times, multiple deliveries are made from a single message. So, if you want to further filter your metrics by a particular delivery, you can view a delivery report for a specific delivery.

A delivery report contains all the metrics pertaining to that particular delivery of the message. Often times, deliveries are sent to multiple lists and/or segments.

If you need to further filter your metrics by a particular list or segment, you can drill-down and view a delivery recipient report. The delivery recipient report contains all the metrics pertaining to a specific list or segment a delivery was sent to.

Delivery Group, Delivery, And Delivery Recipient Reports

In the case of a delivery group, you start very broad by viewing a delivery group report. A delivery group report is an aggregate of all the metrics for each delivery added to the delivery group. From here, if you want to further filter your metrics by a particular delivery, you can view a delivery report for that delivery.

A delivery report contains all the metrics pertaining to a particular delivery added to the delivery group. Often times, deliveries are sent to multiple lists and/or segments.

If you need to further filter your metrics by a particular list or segment, you can drill-down and view a delivery recipient report. The delivery recipient report will contain all the metrics pertaining to the list or segment the delivery was sent to.

A/B Split Test, Split Group, And Delivery Recipient Reports

In the case of an A/B split test, you start very broad by viewing a report for an A/B split test. An A/B split report is an aggregate of all the metrics for each split group used in the A/B split test. If you want to further filter your metrics by a particular split group, you can view a delivery report for that split group. The Delivery Type for a delivery report that represents a split group will say "Split Group". A delivery report for a split group contains all the metrics pertaining to that particular split group. Often times, deliveries representing a split group are sent to multiple lists and/or segments. If you need to further filter your metrics by a particular list or segment, you can drill-down and view a delivery recipient report. The delivery recipient report will contain all the metrics pertaining to the list or segment the delivery representing a split group was sent to.

Automated Message Rule And Date Range Reports

In the case of an automated message rule, you start very broad by viewing an automated message rule report. An automated message rule report is an aggregate of all the metrics for every delivery made via the automated message rule. Automated message rule reports are slightly different from message and A/B split reports in that if you want to further filter your metrics, you do so using dates instead of deliveries. You can filter the metrics by individual days or date ranges of your choosing.

Message Reports (Legacy)

Message reports represent an aggregate of the metrics associated with all of the deliveries made using a message.
Important: This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

You can access a message report by going to Messages > Messages and clicking the report icon for a message in the Email table.

Each tab at the top of a message report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.
- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.
- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.
- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (Legacy) on page 734.
- **Profiler** allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For more information about Profiler, see Report Profiler on page 751.

Message reports maintain metrics for all deliveries, even deliveries that have been deleted. Hence, if you add up the metrics on all the available delivery reports for deliveries made from a message, they may not match the totals on the message report - due to the presence of metrics from deleted deliveries.

Note: The metrics associated with test deliveries are not included in message reports. To view the metrics associated with a test delivery made using a message, click the button next to **Show Metrics For:**. Locate the test delivery and click the subject line associated with that delivery. Keep this in mind if you create a message and only send test deliveries from the message.

Related Topics

Report Sections (Legacy Reports) on page 702

Report sections are the grouping of metrics that are found on reports.

View A Report For A Specific Delivery Made Using A Message (Legacy)

Important: This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

When viewing a message report, you can drill down and view a report for a specific delivery made using the message.

To view a report for a specific delivery made using a message:

1. Click the button next to the **Showing Metrics For** label:

2. Optional: You can use the search box to search for a delivery by **Subject Line** or **API ID**.
3. Optional: By default, transactional, single contact, and skipped deliveries are not shown in the table. If the delivery you are looking is one of these types, you can click Show Transactional and Single Contact Deliveries or Show Skipped Deliveries to include those types of deliveries in the table.

Tip: The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.

4. When you find the delivery you want to view a report for, click the subject line shown in the table for the delivery.

View A Comparison Report From A Message Report (Legacy)

Important: This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

For more information on Comparison reports, see Comparison Reports on page 756.

To add an item to comparison report:

1. View a report for a message.

   There are multiple ways to do this. One such way is to go to Messages > Messages and click the report icon in the row of the message you want to view a report for.

2. Click Compare.

   The comparison report is displayed.

3. Provided you have less than six items added to the comparison report, you can add additional items to compare by clicking
   
   • Add Delivery
   • Add Message
   • Add Automated Message
   • Add Delivery Group

Related Topics

Comparison Reports on page 756

Comparison reports allow you to add multiple items to a single report and compare their metrics.

Delivery Reports (Legacy)

A delivery report contains all of the metrics associated with an individual delivery of a message.

Important: This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

On a delivery report, you can view when, from whom, and to whom the delivery was sent, as well as the subject line and type of delivery.

You can access a delivery report by going to Messages > Deliveries and clicking a report icon in the Deliveries table.
Each tab at the top of a delivery report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.
- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.
- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.
- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (Legacy) on page 734.
- **Profiler** allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For more information about Profiler, see Report Profiler on page 751.

On the Overview page of the report, there is a section of information that provides details about the delivery including delivery type, sending details, and recipient details.

**Note:** If the data associated with the delivery is past the Data Retention period for your account, you will not be able to view the recipients for a delivery. Instead you may see **Recipients: Unavailable** or **Recipients: 1**.

For more information about the Data Retention Period, see Data Retention Policy on page 1509.

The delivery Type represents the type of send. Each type is described below:

- **Normal** - The Normal email delivery type represents a regular email delivery sent to more than one contact.
- **Bulk** - The Bulk email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.
- **Skipped** - The Skipped email delivery type represents email messages that were skipped by Bronto and not sent.
- **Single Contact** - The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.
- **Test** - The Test email delivery type represents email deliveries that were sent as test deliveries.
- **AMR** - The AMR email delivery type represents email deliveries that were sent via an Automated Message Rule.
- **Split Group** - The Split Group email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.
- **FTAF** - The Forwards to a Friend email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.
- **Transactional** - The Transactional email delivery type represents email deliveries were sent as transactional emails.

If you set a throttle for a delivery, you can see the throttle used next to the scheduled start. Next to the sending time, you can view the percentage of the delivery that has completed (if it is still sending), and the total elapsed time for the delivery (after the delivery has completed.)
If you have send time optimization activated, you will see icons if the delivery was optimized by time and/or day. You will also be able to see the scheduled sending time (our projected maximum send time) and the actual sending time (the actual time the delivery took to complete after the delivery has been made). For more information on using send time optimization, see Optimize The Sending Time Of An Email Delivery on page 284.

If the delivery was made via a Workflow or Automated Message Rule, the name of the Workflow or Automated Message Rule will be shown beneath the Subject Line.

**Related Topics**

- Report Sections (Legacy Reports) on page 702
- Report sections are the grouping of metrics that are found on reports.

**Delivery Recipient Reports**

A delivery recipient report contains all of the metrics associated with an individual delivery sent to a specific list or segment.

On a delivery recipient report, you can view when, from whom, and to whom the delivery was sent, as well as the subject line and type of delivery.

To access a delivery recipient report

1. Go to Messages > Deliveries.
2. Click a report icon in the Deliveries table to open a delivery report.
3. In the tab banner, click the information next to Showing Metrics For:.

   A new window opens.
4. Click the recipient name.

   The delivery recipient report is displayed.

Each tab at the top of a delivery recipient report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
• **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.

• **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.

• **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.

• **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics ( legacy) on page 734.

On the Overview page of the report, there is a section of information that provides details about the delivery including delivery type, sending details, and recipient details.

Note: If the data associated with the delivery is past the Data Retention period for your account, you will not be able to view the recipients for a delivery. Instead you may see Recipients: Unavailable or Recipients: . For more information about the Data Retention Period, see Data Retention Policy on page 1509.

**Delivery Recipient Report:** List: Example List

When viewing the report for a delivery recipient, you can view the delivery rating in the top right corner of the report.

**Delivery Rating**

Tip: For more information on the delivery rating and it's impact on your account, see Sender and Delivery Rating on page 309.

**View A Different Delivery Recipient Or Viewing The Delivery Report**

When viewing a delivery recipient report, if you want to view a different delivery recipient, the delivery report, or want to view the message report, click the button next to the Showing Metrics For label:

You will then be able to select another delivery recipient, the delivery report, or the message report.
Delivery Group Reports
A delivery groups report contains all of the metrics associated with each delivery or post added to a delivery group.

You can access a delivery group report by going to Messages > Delivery Groups and clicking a report icon in the Delivery Groups table.

Each tab at the top of a delivery group report provides a different set of metrics:
- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.
- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.
- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.
- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (legacy) on page 734.
- **Metrics By Delivery** displays a quick view of the metrics associated with the deliveries of the message. For more information about Metrics By Delivery metrics, see Metrics By Delivery Report Metrics (Legacy) on page 737.
- **Profiler** allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For more information about Profiler, see Report Profiler on page 751.

Related Topics
Report Sections (Legacy Reports) on page 702
Report sections are the grouping of metrics that are found on reports.

View A Report For A Specific Delivery Added To A Delivery Group
When viewing a delivery group report, you can drill down and view a report for a specific delivery added to the delivery group.

**Warning:** The deliveries count shown next to the All Time Deliveries button includes temporary deliveries, skipped deliveries, and deliveries restricted by user permissions. Because of this, the number of deliveries shown in the table when you actually pick the deliveries maybe less than the number shown on the button. The reason for this is you are unable to pick, and thus view a report for skipped and temporary deliveries (because they never got sent and thus have no data associated with them). For deliveries restricted by user permissions, we don't allow users to view reports for deliveries they have not been given access to view.

To view a report for a specific delivery added to a delivery group:

**Tip:** For more information on setting up user permissions, see User Permissions on page 1338.

1. Navigate to a report for a delivery group.
2. Click the button next to the Showing Metrics For label.

![Showing Metrics For](image)

3. Optional: By default, transactional and single contact deliveries are not shown in the table. If the delivery you are looking for is one of these types, you can click Show Transactional and Single Contact Deliveries to include those types of deliveries in the table.

**Tip:** The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.

4. Click on the name of the message used in the delivery you want to view metrics for.
**View A Comparison Report From A Delivery Group Report**

You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

For more information on Comparison reports, see Comparison Reports on page 756.

To add an item to comparison report:

1. View the report for a Delivery Group.
   
   There are multiple ways to do this. One such way is to go to Messages > Delivery Groups and click the report icon in the row of the delivery group you want to view a report for.

2. Click Compare.
   
   The comparison report is displayed.

3. Provided you have less than six items added to the comparison report, you can add additional items to compare by clicking
   
   - Add Delivery
   - Add Message
   - Add Automated Message
   - Add Delivery Group

**A/B Split Test Report**

An A/B split report is an aggregate of all the metrics associated with an A/B split test.

On an A/B split test report, you can view from whom and to whom the A/B split test was sent. You can also view the percentage used for the test groups, a description of the test being performed, and the actual difference between the split groups.

You can access an A/B split test report by going to Messages > Deliveries, locating an A/B split test in the Deliveries table, and clicking its report icon.

Each tab at the top of an A/B split test report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.

- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.

- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.

- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.

- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.

- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (Legacy) on page 734.

- **Profiler** allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For more information about Profiler, see Report Profiler on page 751.
Report Sections (Legacy Reports) on page 702
Report sections are the grouping of metrics that are found on reports.

A/B Split Tests on page 321
A/B split tests allow you to automate the tedious steps of testing different message types and provide access to valuable testing data with a minimal investment of your time.

View The Test Description On An A/B Split Test Report
On an A/B split test report, you can view from whom and to whom the A/B split test was sent. You can also view the percentage used for the test groups, a description of the test being performed, and the actual difference between the split groups.

<table>
<thead>
<tr>
<th>From: Example Company (<a href="mailto:example@rep1.example.com">example@rep1.example.com</a>)</th>
<th>Sent By: JaneExample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipients: List: ExampleList</td>
<td></td>
</tr>
<tr>
<td>Test Groups: A: Group A (500) - Winter</td>
<td></td>
</tr>
<tr>
<td>B: Group B (500)</td>
<td></td>
</tr>
<tr>
<td>Split Description: 2 different versions of your message were sent to test groups, each with a different subject line. The version which had the highest open rate was sent to the remaining 90% of your contacts at 08/06/2010 09:00 PM.</td>
<td></td>
</tr>
<tr>
<td>Subject Line: A: Sale At Example Store! B: Save Big Over 3.000 Example Items On Sale!</td>
<td></td>
</tr>
</tbody>
</table>

View Metrics For A Specific Split Group
When viewing an A/B split report, if you want to view a specific split group from the test, click the button next to the Showing Metrics For label:

You will then be able to select a specific split group from the test and view a report for it.

View The Totals From All Split Groups On An A/B Split Test Report
The Totals From All Split Groups section at the bottom of an A/B split test report displays metrics for all the split groups used in an A/B split test. You can click on the name of a specific split group to view a report for that split group. Below the table, you can also view a description of the A/B split test that was performed.

For more information A/B split tests, see A/B Split Tests on page 321.

SMS Reports
SMS message reports represent an aggregate of the all the metrics associated with all of the deliveries of an SMS message.

SMS message reports contain metrics for all deliveries, even those deliveries that have been deleted. Due to the presence of metrics from deleted deliveries, the metrics on all the available delivery reports for deliveries made from an SMS message may not add up to the totals on the SMS message report.

You can access an SMS report by going to Messages > Messages, clicking on SMS, and clicking the report icon for an SMS message in the SMS table.

View SMS Message Report Overview Metrics
SMS message reports represent an aggregate of the all the metrics associated with all of the deliveries of an SMS message.

SMS message reports contain metrics for all deliveries, even those deliveries that have been deleted. Due to the presence of metrics from deleted deliveries, the metrics on all the available delivery reports for deliveries made from an SMS message may not add up to the totals on the SMS message report.

To view an SMS messages report:

1. Go to Messages > Messages.
2. Click on SMS.
3. Click the report icon in the row associated with an SMS message.

### SMS Message Report Overview Metrics

Below is a list of each metric shown on the overview page of an SMS message report, along with a description of what the metrics represents.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>How It's Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Sent (SMS)</strong></td>
<td>The <em>Total Sent (SMS)</em> sent metric represents the total number SMS messages sent. The <em>Total Sent (SMS)</em> metric is important to know for the purpose of making sure you don't exceed the number of SMS messages allocated for your account.</td>
<td>SMS Delivered + SMS Undeliverable = SMS Total Sent</td>
</tr>
<tr>
<td><strong>Total Recipients (SMS)</strong></td>
<td>The <em>Total Recipients (SMS)</em> metric represents the total count of recipients who received an SMS message.</td>
<td>SMS Single Recipients + SMS Multi-Part Recipients = SMS Total Recipients</td>
</tr>
<tr>
<td><strong>Single Recipients (SMS)</strong></td>
<td>The <em>Single Recipients (SMS)</em> metric represents the count of recipients receiving a single SMS message. You can compare this metric with the <em>Multi-Part Recipients (SMS)</em> metric to find out the <em>Total Recipients (SMS)</em> metric.</td>
<td>SMS Total Recipients - SMS Multi-Part Recipients = SMS Single Recipients</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Multi-Part Recipients (SMS)</strong></td>
<td>The <em>Multi-Part Recipients (SMS)</em> metric displays the number of recipients who were sent an SMS message that was split into multiple parts due to the message content exceeding the 160 character limit. Each message split will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages. Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.</td>
<td>SMS Total Recipients - SMS Single Recipients = SMS Multi-Part Recipients</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Multi-Part Messages (SMS)</strong></td>
<td>The <em>Multi-Part Messages (SMS)</em> metric displays the number of SMS messages that exceeded the 160 character limit and were split into multiple parts. Each part of the message is split into two will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.</td>
<td><strong>Note:</strong> SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.</td>
</tr>
<tr>
<td><strong>Delivery Rate (SMS)</strong></td>
<td>The <em>Delivery Rate (SMS)</em> metric represents the percentage of SMS messages that were successfully delivered.</td>
<td>*(SMS Delivered / SMS Total Sent) * 100 = SMS Delivery Rate</td>
</tr>
<tr>
<td><strong>Delivered (SMS)</strong></td>
<td>The <em>Delivered (SMS)</em> metric represents the total number of SMS messages that were successfully delivered.</td>
<td><strong>SMS Total Sent - SMS Undeliverable = SMS Delivered</strong></td>
</tr>
<tr>
<td><strong>Click Rate (SMS)</strong></td>
<td>The <em>Click Rate (SMS)</em> metric represents the percentage of clicks that were recorded for an SMS message. The <em>Click Rate (SMS)</em> metric gives you an indication of how effective the SMS you sent was at getting contacts to click the links contained therein.</td>
<td>*(SMS Clicks / SMS Total Sent) * 100 = SMS Click Rate</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Total Clicks (SMS)</td>
<td>The Total Clicks (SMS) metric represents the total number of times links contained in an SMS message were clicked.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Download A Report For An SMS Message**

The metrics shown on SMS message reports can be downloaded immediately or automatically at time intervals of your choosing.

To download the metrics contained on an SMS message report:

1. Go to **Messages > Messages**.
2. Click the report icon in the row associated with an SMS message.
3. Click **Download**.
4. In the **Report Options** section, select what type of report you want download from the **Generate Report** pull-down menu. You can select:
   - **Summary Report** - The summary report contains a summary of all the available metrics recorded.
   - **Detailed Contact Report** - The detailed contact report contains a per contact break-down of metrics recorded.
   - **Both**

   For a detailed explanation of all the metrics contained in summary and detailed contact activity reports, see Summary Report Metrics on page 823 and Detailed Contact Activity Report Metrics on page 843.
5. Optional: Only if you select **Detailed Contact Report** or **Both**:
   a) Select which metrics you want to include in the **Detailed Contact Report**.
      You can select:
      - All
      - Sent
      - Delivered
      - Undeliverable
      - Opens
      - Click Throughs
      - Conversions
      - Forwards To A Friends
      - Updates
      - Unsubscribes
      - Frequency Caps
      - Onboarding Skipped
   b) Click the **Include Fields in Detailed Contact Report** checkbox if you want to include field data in the **Detailed Contact Report**.
6. Click the **Include Fields in Detailed Contact Report** checkbox if you want to include field data in the **Detailed Contact Report**.
7. Optional: In the **Send To:** text box, add the email addresses of any people you want to notify once the report has finished generating. Separate different email addresses using a comma.

   The email will contain a preview of the metrics included in the full report, along with a link to access the report. You can also add a subject line in the **Subject Line** text box, and a note in the **Note** text box.

   The text included in the **Note** text box will appear in the body of the email.
8. Choose a time to generate the report. It can either be generated immediately, or at a specific time and interval.

To generate the report immediately, click the **Generate Report Now** radio button. You will be notified via an in-application notification (and an email if you provided notification email addresses above) when the report is ready to download. To generate the report at a specific time, click the **Generate At Specific Date And Time** radio button, and then choose a date and time using the date and time picker. You can also have the report generated at recurring intervals by clicking the **Generate At Recurring Interval** checkbox, and then choosing the interval using the pull-down menu. You can select:

- Daily
- Weekly
- Bi-Weekly
- Monthly
- Quarterly
- Yearly

The notification email above will be sent when the report has finished generating and is ready to view.

9. Click **Save**.

**View SMS Message Click Metrics**

The **URL Statistics** section on an SMS message report contains information and metrics about URLs used in the SMS message. In the table, you can view the following metrics/information:

- **Delivery Date** - The date the SMS delivery was sent.
  
  **Tip:** If you click the delivery date, the table will expand to show URLs used in that delivery.

- **Full URL** - The URL used in the SMS delivery.
- **Clicks** - The total number of times the link was clicked.
- **% Of Total Clicks** - The percentage clicks the link received as compared to the total clicks recorded for the SMS message.

To view click metrics for an SMS message:

1. Go to **Messages > Messages**.
2. Click the report icon in the row associated with an SMS message.
3. Scroll down to the URL Statistics section.

**View SMS Message Report Delivery Information**

The Deliveries Of This Message section on an SMS message report contains a table which displays metrics about the deliveries made using the SMS message. To view more detailed metrics about a specific delivery, click the report icon in the row associated with an SMS delivery.

To view delivery information for an SMS message:

1. Go to Messages > Messages.
2. Click the report icon in the row associated with an SMS message.
3. Scroll down to the Deliveries Of This Message section.

The following metrics are shown in the table in the Deliveries Of This Message section:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>How It's Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>The Status column indicates the state of an SMS delivery. Each status is</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>described below:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Sent</strong> - The Sent status represents SMS deliveries that have been</td>
<td></td>
</tr>
<tr>
<td></td>
<td>successfully sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Sending</strong> - The Sending status represents SMS deliveries that are</td>
<td></td>
</tr>
<tr>
<td></td>
<td>in the process of being sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Skipped</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Unsent</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Archived</td>
<td></td>
</tr>
<tr>
<td><strong>Send Date</strong></td>
<td>The Send Date column contains the actual date and time the SMS delivery</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>was sent.</td>
<td></td>
</tr>
<tr>
<td><strong>Total Sent (SMS)</strong></td>
<td>The Total Sent (SMS) metric represents the total number SMS messages sent.</td>
<td>SMS Delivered + SMS Undeliverable = SMS Total Sent</td>
</tr>
<tr>
<td></td>
<td>The Total Sent (SMS) metric is important to know for the purpose of making</td>
<td></td>
</tr>
<tr>
<td></td>
<td>you don't exceed the number of SMS messages allocated for your account.</td>
<td></td>
</tr>
<tr>
<td><strong>Total Recipients (SMS)</strong></td>
<td>The Total Recipients (SMS) metric represents the total count of recipients</td>
<td>SMS Single Recipients + SMS Multi-Part Recipients = SMS</td>
</tr>
<tr>
<td></td>
<td>who received an SMS message.</td>
<td>Total Recipients</td>
</tr>
<tr>
<td><strong>Total Clicks (SMS)</strong></td>
<td>The Total Clicks (SMS) metric represents the total number of times links</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>contained in an SMS message were clicked.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unique Clicks (SMS)</td>
<td>The <em>Unique Clicks (SMS)</em> metric is the sum of all the unique clicks recorded for an SMS message. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an SMS you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded. <strong>Note:</strong> The <em>Unique Clicks (SMS)</em> metric if not the same as the <em>Total Clicks (SMS)</em> metric. For more information on the <em>Total Clicks (SMS)</em> metric and how it is calculated, see <a href="#">SMS Total Clicks Metric</a> on page 890.</td>
<td>The <em>Unique Clicks (SMS)</em> metric is the sum of all the unique clicks recorded for an SMS message.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><em>Multi-Part Messages (SMS)</em></td>
<td>The <em>Multi-Part Messages (SMS)</em> metric displays the number of SMS messages that exceeded the 160 character limit and were split into multiple parts. Each part the message is split into will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.</td>
<td>SMS Total Sent - SMS Single Recipients = SMS Multi-Part Messages</td>
</tr>
<tr>
<td></td>
<td>Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Incoming (SMS)</td>
<td>The <em>Incoming (SMS)</em> metric represents the total number of times contacts replied to an SMS message you sent them.</td>
<td>The <em>Incoming (SMS)</em> metric is a total of the number of times contacts replied to an SMS message you sent them.</td>
</tr>
</tbody>
</table>

**Note:** Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

**View SMS Delivery Report Delivery Information**

In the **Delivery Reports Information** section on SMS delivery report, you can view the following information about the SMS delivery:

- **Delivery Type:** The type of delivery made. The delivery type can be:
  - *Bulk:* Were sent in bulk and includes normal deliveries and split deliveries.
  - *Test:* Were sent with a test status.
  - *Workflow:* Were sent automatically via a workflow
  - *Transaction:* Were sent with a transactional status.

- **Scheduled Sending Time:** Time the SMS delivery was scheduled to be sent.

- **Delivery Status:** Status of the delivery. Each status is described below:
  - *Sent:* Represents SMS deliveries that have been successfully sent.
  - *Sending:* Represents SMS deliveries that are in the process of being sent.
  - *Skipped:* Represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.
  - *Unsent:* Represents deliveries that were not sent.
  - *Archived:* Represents deliveries that were archived.
  - **Keywords:** Keywords the SMS delivery was sent to.
  - **Eligible Lists/Segments:** The lists and segments of contacts that received the message if they were subscribed to the indicated keyword.
  - **Ineligible Lists/Segments:** The lists and segments of contacts who did not receive the message, even if they were subscribed to the indicated keyword.
  - **Message:** The SMS message used in the SMS delivery.

To view delivery information on an SMS delivery report:

1. Go to **Messages > Deliveries**.
2. Click **SMS**.
3. Click the report icon in row associated with an SMS delivery.
**View SMS Delivery Report Overview Metrics**

SMS delivery reports display metrics associated with a delivery of an SMS message. Below is a list of each metric shown on the overview page of an SMS delivery report, along with a description of what the metrics represents.

<table>
<thead>
<tr>
<th>Total Sent</th>
<th>Total Recipients</th>
<th>Single Recipients</th>
<th>Multi-Part Recipients</th>
<th>Delivery Rate</th>
<th>Click Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>189,176</td>
<td>189,176</td>
<td>189,176</td>
<td>0</td>
<td>99.4%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

To view overview metrics on an SMS delivery report:

1. Go to **Messages > Deliveries**.
2. Click **SMS**.
3. Click the report icon in row associated with an SMS delivery.

**View SMS Delivery Click Metrics**

The **URL Statistics** section on an SMS delivery report contains information and metrics about URLs used in the SMS delivery. In the table, you can view the following metrics/information:

- **Delivery Date**: Date the SMS delivery was sent.
  
  **Tip**: If you click the delivery date, the table will expand to show URLs used in that delivery.

- **Full URL**: URL used in the SMS delivery.
- **Clicks**: Total number of times the link was clicked.
- **% Of Total Clicks**: Percentage clicks the link received as compared to the total clicks recorded for the SMS message.

To view the click metrics for an SMS delivery:

1. Go to **Messages > Deliveries**.
2. Click **SMS**.
3. Click the report icon in row associated with an SMS delivery.

**Workflow Reports**

A workflow report contains all of the metrics associated with deliveries made via a workflow.

You can access a workflow report by going to **Automation > Workflows** and clicking the report icon for a workflow in the **Your Workflows** table.

Each tab at the top of a workflow report provides a different set of metrics:

- **Overview** displays the overview page. For more information about Overview metrics, see **Report: Overview Metrics (Legacy)** on page 702.
- **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see **Report Deliverability Metrics (Legacy)** on page 714.
- **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see **Report: Open Metrics (Legacy)** on page 721.
- **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see **Report: Click Metrics (Legacy)** on page 726.
- **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see **Report: Conversion Metrics (Legacy)** on page 730.
- **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see **Report: Sharing Metrics (Legacy)** on page 734.
- **Metrics By Delivery** displays a quick view of the metrics associated with the deliveries of the message. For more information about Metrics By Delivery metrics, see **Metrics By Delivery Report Metrics (Legacy)** on page 737.

**Related Topics**

**Report Sections (Legacy Reports)** on page 702

Report sections are the grouping of metrics that are found on reports.
Workflows on page 346
Workflows allow you to automate steps of a multi-channel marketing life-cycle by specifying combinations of triggers, filters, and actions that determine how to handle contact data and what marketing communications to send.

View A Report For A Specific Delivery Made Via A Workflow
When viewing a workflow report, you can view a report for a specific delivery made via the workflow.

To view a report for a specific delivery made using a workflow:
1. Click the button next to the Showing Metrics For label:

2. Optional: By default, transactional, single contact, and skipped deliveries are not shown in the table. If the delivery you are looking is one of these types, you can click Show Transactional and Single Contact Deliveries or Show Skipped Deliveries to include those types of deliveries in the table.

The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.

3. Click on the name of the message used in the delivery you want to view metrics for.

AMR Reports
An automated message rule report is an aggregate of all the metrics associated with all the days an automated message rule has been sending messages.

You can access an automated message rule report by going to Automation > Automated Message Rules and clicking the report icon for a message in the AMR table.

Each tab at the top of an AMR report provides a different set of metrics:

• Overview displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.
• Deliverability display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.
• Opens displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.
• Clicks displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.
• Conversions displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.
• Sharing displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (legacy) on page 734.
• Metrics By Day displays an aggregate of all the metrics associated with all the days an automated message rule has been sending. For more information about Metrics By Day metrics, see AMR Metrics By Day Report Metrics on page 744.

Related Topics
Report Sections (Legacy Reports) on page 702
Report sections are the grouping of metrics that are found on reports.

View Total Metrics For The Deliveries Made In The Last 7 Days Via An Automated Message Rule
The Totals From last 7 Days section at the bottom of an automated message rule report displays metrics for the last 7 days of deliveries made via the automated message rule. You can click on the name of a specific day to view metrics for deliveries made via automated message rules on that day. You can click View all previous days to view the metrics for all the days the automated message rule has been sending.

View A Comparison Report From An AMR
You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

For more information on comparison reports, see Comparison Reports on page 756.

To add an item to comparison report:

1. View the report for an automated message rule. 
   There are multiple ways to do this. One such way is to go to Automation > Automated Message Rules and click the report icon in the row of the automated message rule you want to view a report for.

2. Click Compare.
   The comparison report is displayed.

3. Provided you have less than six items added to the comparison report, you can add additional items to compare by clicking
   - Add Delivery
   - Add Message
   - Add Automated Message
   - Add Delivery Group

**Related Topics**

Comparison Reports on page 756
Comparison reports allow you to add multiple items to a single report and compare their metrics.

**Report Sections (Legacy Reports)**

Report sections are the grouping of metrics that are found on reports.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

Each report has multiple sections that contain a group of related metrics. You can access a section of a report by clicking on a tab at the top of the report.

**Report: Overview Metrics (Legacy)**

The Overview tab on a report provides a high-level view of the metrics associated with a report.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The following report types display the overview metrics shown below:

- Message Reports (Legacy) on page 682
- Delivery Reports (Legacy) on page 684
- Delivery Recipient Reports on page 686
- Delivery Group Reports on page 688
- A/B Split Test Report on page 689
- Workflow Reports on page 700
- AMR Reports on page 701

For more information about overview metrics on an SMS report see SMS Message Report Overview Metrics on page 691.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through</td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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<tr>
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</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>

### Pipeline Metrics

- **Delivery Rate** 100.8%
- **Open Rate** 21.4%
- **Click Rate** 34.4%
- **Conversion Rate** 1.8%
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
</tbody>
</table>

**Delivered Metrics**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Through Rate</strong></td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link. <strong>Tip:</strong> The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see <strong>Click Rate Metric</strong> on page 858.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion/Delivered Rate</td>
<td>The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.</td>
<td>The conversion/delivered rate is important because it gives you an overall indication of the contacts who received your message and were also engaged enough to convert. Whether it's making a purchase or downloading a whitepaper, the ultimate goal of email marketing is to compel your contacts to perform an action. <strong>Tip:</strong> The conversion/delivered rate is a legacy calculation. For a more useful calculation, we suggest you view the conversion rate. The conversion rate is determined by the number of conversions over the number of clicks. For more information on the conversion rate, see Conversion Rate Metric on page 864.</td>
</tr>
</tbody>
</table>

```
6 (0.1%) Forwards To A Friend
6 (0.1%) Contacts Who Shared
6 Total Social Shares
19 Social Views
0 (0.0%) Contact Updates
As a percentage of Opens
```
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forwards To A Friend</td>
<td>The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link. <strong>Tip:</strong> For more information on adding a forward to a friend link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on forward to a friend webforms, see Types of Webforms on page 204.</td>
<td>The forwards to a friend metric is important because it highlights both contact engagement, and the effectiveness of the email you sent. If a contact makes the effort to use the forward to a friend link, most of the time it means they found the email you sent them compelling enough to forward it to a friend.</td>
</tr>
<tr>
<td>Contacts Who Shared (email)</td>
<td>The contacts who shared metric represents the number of contacts who used the social sharing links contained in the email. For example, • Contact A clicks the Facebook sharing link • Contact B clicks the Twitter and LinkedIn sharing links • Contact C clicks the Facebook and Twitter sharing links Then 3 is recorded for the Contacts Who Shared metric. <strong>Note:</strong> Forward to a friend URLs are not included in the total social shares metric. <strong>Tip:</strong> For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td>The contacts who shared metric is important because it allows you to see how many contacts used at least 1 of the social sharing links contained in an email message you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Total Social Shares (email)</td>
<td>The total social shares metric represents the total number of times social sharing links contained in the email were clicked. For example, if one contact uses the Twitter social sharing link, and another contact uses the Facebook social sharing link, then 2 would be recorded for the total social shares.  Note: Forward to a friend URLs are not included in the total social shares metric.  Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td>The total social shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the social sharing links, then most likely it means they found the email you sent them compelling enough to share it with one of their social networks.</td>
</tr>
<tr>
<td>Social Views (email)</td>
<td>The social views metric represents the total number of times an email shared via social sharing links was viewed.  Note: Views will be counted for anyone that views the email shared via social sharing links, not just contacts in your account. Forward to a friend URLs are not included in the social shares metric.  Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td>The social views metric is important because it allows you to see how effective the email you sent is after it has been shared via social sharing links. This metric can give you insight into the effectiveness of using social sharing links in your emails, as well as the effectiveness of your emails with an audience outside your contacts.</td>
</tr>
<tr>
<td>Contact Updates (email)</td>
<td>The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.  Tip: For more information on adding a manage preferences link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on manage preferences webforms, see Types of Webforms on page 204.</td>
<td>The contact updates metric is important because it allows you to see how many contacts updated their information via a manage preferences link contained in an email you sent them. If you notice that the contact updates number is high, you should dig a little deeper and find out what contacts are doing once they get to the manage preferences page. Depending on the actions they are taking on the manage preferences page, you may need to re-work the content of the email, or re-evaluate the list or segment you are sending to.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Undeliverable (email)</strong></td>
<td>The email undeliverable metric represents the number of sent emails that were not delivered.</td>
<td>The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.</td>
</tr>
<tr>
<td><strong>Hard Bounce (email)</strong></td>
<td>Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces. <strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
<td>The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td><strong>Soft Bounce (email)</strong></td>
<td>Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down. <strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
<td>The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Email Frequency Cap (Skipped)** | The frequency cap (skipped) metric represents the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account.  
**Tip:** For more information on the email frequency cap settings, see [Set Email Frequency Caps For Your Account](#) on page 1330. | There are several reasons why you might see a high number of emails skipped for exceeding your frequency cap settings. You could simply be scheduling too many deliveries to your contacts, or you might have an automated message rule that is sending too much. Skipped deliveries represent missed conversion opportunities, so you'll want to review your sending process to try and prevent skipped deliveries from occurring. |
| **Email Onboarding (Skipped)**  | The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time. If you are continually seeing a high number of contacts skipped due to onboarding, it could mean you are trying to import a bad list. If you are importing a healthy list, contacts should very quickly move from onboarding to active. So, if you are continually seeing high numbers under onboarding (Skipped), you should re-examine the contacts you are importing or adding.  
**Tip:** For more information on the automated onboarding process, see [Automated Onboarding](#) on page 1081. | The onboarding (skipped) metric is important for two reasons. First, it lets you know about any contacts that could not be sent to. Second, it gives you an indication of how the contacts you are importing are affecting your account. |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Loss (email)</td>
<td>The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see Contact Status on page 1083.</td>
<td>The contact loss metric is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under contact loss, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
</tr>
<tr>
<td>Email Unsubscribes (From Unsubscribes)</td>
<td>The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform. Tip: For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.</td>
<td>The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.</td>
</tr>
<tr>
<td>From Complaint (email)</td>
<td>The Complaint (From Complaint) metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.</td>
<td>The Complaint (From Complaint) metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP or via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application.</td>
</tr>
</tbody>
</table>
### Metric | Description | Why It's Useful
--- | --- | ---
**Inactive Due To Bounces (email)** | The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. The bounce limit represents the number of times emails sent to a particular contact can consecutively bounce before the contact is made inactive. Once a contact is made inactive, you can no longer send to them until they once again opt-in to receiving marketing emails from you. **Tip:** For more information on bounces, see Email Bounce on page 196 in help. **Tip:** For more information on setting the bounce limit in your account, see Set A Bounce Limit For Your Account on page 1330. | The inactive due to bounces metric is important because it better clarifies why you are losing contacts. If you notice a high number under inactive due to bounces, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.

---

### Report Deliverability Metrics (Legacy)
The Deliverability tab displays all of the metrics related to the delivery of messages.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The following report types have deliverability metrics:

- Message Reports (Legacy) on page 682
- Delivery Reports (Legacy) on page 684
- Delivery Recipient Reports on page 686
- Delivery Group Reports on page 688
- A/B Split Test Report on page 689
- Workflow Reports on page 700
- AMR Reports on page 701

Below is a list of all the metrics shown on a deliverability report, along with a description of what each metric represents.
<table>
<thead>
<tr>
<th><strong>Metric</strong></th>
<th><strong>Description</strong></th>
<th><strong>Why It's Useful</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td><strong>Undeliverable (email)</strong></td>
<td>The email undeliverable metric represents the number of sent emails that were not delivered.</td>
<td>The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.</td>
</tr>
<tr>
<td><strong>Contact Loss Rate (email)</strong></td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them. <strong>Tip:</strong> For more information on the inactive status type, see Contact Status on page 1083</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
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<td>----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Hard Bounce (email)**        | Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.  

   **Tip:** For more information on the bounce classification system, see Email Bounce on page 196. | The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending. |
| **Bad Email Address**          | The bad email address bounce type means that the email server in question has indicated that this is not a valid account. Whether the contact has left that host, had a typo in their registration, or simply made up the email address cannot be discerned from this message.  

   **Tip:** For more information on the bounce classification system, see Email Bounce on page 196. | The bad email address metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of bad email address bounces, you need to review your contact gathering mechanisms. Are you forcing people to provide an email address? Contacts may just be making something up to get through the form. Or, perhaps the demographic you are appealing to is more likely to not want to give out their real email address. If so, you may want to tempt them to give a real address by telling them that you will send a coupon, more information, or a link they need to click to verify their account. It all really depends on how bad you want their email address. If you aren't going to validate addresses in some way, then you probably shouldn't require people to give you their email address. |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Destination System Unreachable</strong></td>
<td>The destination system unreachable hard bounce type means that there was a connection issue with the email server.</td>
<td>A destination system unreachable hard bounce is different than a bad email address hard bounce (which results in immediate removal of the contact in question). This bounce type means that we will not retry sending this specific email to this specific contact at this time because it is not likely to succeed. Later deliveries to the contact may succeed.</td>
</tr>
<tr>
<td><strong>Rejected Due To Message Content</strong></td>
<td>The rejected due to message content hard bounce type means that the email server has identified the email as spam.</td>
<td>We will not attempt to resend an email that results in a rejected due to message content hard bounce. If you see a number of these, then you should probably look at the message you are sending and take the time to run your message through a spam test. If you are still having problems or have questions about what may be causing this, please contact support.</td>
</tr>
<tr>
<td><strong>Soft Bounce (email)</strong></td>
<td>Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.</td>
<td>The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
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<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Temporary Contact Issue            | Temporary contact issue means that there was a temporary issue at the receiving mail server with respect to the contact in question. An example of this is a mailbox full message.  

**Tip:** For more information on the bounce classification system, see Email Bounce on page 196. | There isn't too much you can do about a temporary contact issue bounce. It may, however, be an early indicator that a user has abandoned this email address. If you want to be pro-active and try to stem these type of bounces from occurring, include the manage preferences link (using `%%!manage_url%%`) within your emails, in addition to the unsubscribe link. This allows users to easily update their email address. |
| Destination System Temporarily Unreachable | Destination system temporarily unreachable soft bounce type means that there was a temporary issue at the receiving mail server, such as a server busy message.  

**Tip:** For more information on the bounce classification system, see Email Bounce on page 196. | A destination system temporarily unreachable bounce may be resolved via retries. If it is not, there is little you can do about this. |
| Deferred Due To Message Content    | Deferred due to message content is quite similar to the rejected message content bounce. Emails aren't often identified this way, as ISPs don't want you to resend something they identify as spam.  

**Tip:** For more information on the bounce classification system, see Email Bounce on page 196. | If you are seeing a majority of your emails being classified as deferred due to message content bounces, you should check your message and see if you can reduce its likelihood of being identified as spam. |
| Unclassified                       | The unclassified metric represents the number of bounces that could not be classified using our bounce classification system. We try our best to classify bounces and keep from showing them as unclassified so that you can better understand why bounces are occurring. | We developed our bounce classification system in such a way that the most common types of bounces would always be classified. If you are noticing a high number of unclassified bounces, then something outside of normal circumstances is likely occurring. In this case, you should contact support for assistance in diagnosing the problem. |
### Contact Loss (email)

The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see Contact Status on page 1083.

The contact loss metric is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under contact loss, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.

### Email Unsubscribes (From Unsubscribes)

The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.

**Tip:** For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>From Complaints - ISP Feedback</strong></td>
<td>The <em>From Complaints - ISP Feedback</em> metric represents the number of contacts that were lost (made inactive) by complaining via an ISP feedback loop.</td>
<td>The <em>From Complaints - ISP Feedback</em> metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP. They can do this by clicking the <strong>Report Spam</strong> button (or similarly named button) after receiving an email from you.</td>
</tr>
<tr>
<td></td>
<td><strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see <strong>Sender and Delivery Rating</strong> on page 309.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see <strong>Tips For Fixing A Low Email Sender/Delivery Rating</strong> on page 311.</td>
<td></td>
</tr>
<tr>
<td><strong>From Complaints - Bronto Feedback</strong></td>
<td>The <em>From Complaints - Bronto Feedback</em> metric represents the number of contacts that were lost (made inactive) by complaining via the application. A contact can complain using a Complaint webform.</td>
<td>The <em>From Complaints - Bronto Feedback</em> metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain the Complaint webform. They can do this by clicking the link to a Complaint webform in an email they receive from you.</td>
</tr>
<tr>
<td></td>
<td><strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see <strong>Sender and Delivery Rating</strong> on page 309.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see <strong>Tips For Fixing A Low Email Sender/Delivery Rating</strong> on page 311.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on Complaint webforms, see <strong>Types of Webforms</strong> on page 204.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
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<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><em>Inactive Due To Bounces (email)</em></td>
<td>The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. The bounce limit represents the number of times emails sent to a particular contact can consecutively bounce before the contact is made inactive. Once a contact is made inactive, you can no longer send to them until they once again opt-in to receiving marketing emails from you.</td>
<td>The inactive due to bounces metric is important because it better clarifies why you are losing contacts. If you notice a high number under inactive due to bounces, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

**Report: Open Metrics (Legacy)**

The *Opens* tab on reports provides metrics related to message opens.

⚠️ **Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The following report types display the detailed open metrics shown below:

- Message Reports (Legacy) on page 682
- Delivery Reports (Legacy) on page 684
- Delivery Group Reports on page 688
- Workflow Reports on page 700
- AMR Reports on page 701

Below is a list of all the metrics shown on a detailed open report for a report, along with a description of what each metric represents.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
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</tr>
</tbody>
</table>
| **Total Opens**     | The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.  
**Note:** The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see Opens Metric on page 882. | The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them. |
| **Average Opens**   | The average opens metric represents the average number of times emails you sent were opened. For example, if 20 total opens and 5 emails are recorded, then the average opens would be 4.  
**Note:** Total opens and opens are not the same metric. For more information on what each metric means, see Total Opens Metric on page 890 and Opens Metric on page 882. | The average opens metric is important because it represents an initial level of average interaction with emails you send. It can also signify that the subject line is effective and the from name is trusted. |
If you move your mouse over a country, you can view the opens and open rates for that country.

You can use the plus and minus buttons to zoom in and out on the map.

If you click on the name of a country, you can view open metrics by state/region.
If move your mouse over a state/region, you can view the opens and open rate for that state/region. If you click on a state/region, the name and metrics for the state/region will be added to the top right of the map, allowing you to compare metrics across multiple states/regions.

To return to the world map, click the return button.

Email Client

When viewing an open report, you can view the opens and open rate by email client. These graphs are located at the bottom of the open report.

Note: The total count of email clients that could not be determined is displayed at the bottom of the Opens By Email Client section.
Report: Click Metrics (Legacy)

The **Clicks** tab displays all of the metrics related to clicks within messages.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The following report types contain Click metrics:

- Message Reports (Legacy) on page 682
- Delivery Reports (Legacy) on page 684 In addition to the metrics shown below, the Clicks tab on a delivery report contains a heat map that you can use to see which items in your message were clicked. For more information about this see Delivery Reports: URLs Clicked Heat Map (Legacy) on page 729.
- Delivery Group Reports on page 688
- Delivery Recipient Reports on page 686
- A/B Split Test Report on page 689
- Workflow Reports on page 700
- AMR Reports on page 701

For more information about click metrics on an SMS report, see View SMS Message Click Metrics on page 695.

Below is a list of all the metrics shown on a detailed click report with a description of what each metric represents.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Clicks</td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em>  The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Click Through Rate</td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
</tbody>
</table>
| **Total Clicks**       | The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe  
  • clicks link A 10 times  
  • and clicks link B 5 times  
  And Taylor Doe  
  • clicks link B 5 times  
  Then 20 total clicks are recorded. | The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest. |
| **Average Clicks**     | The average clicks metric represents the average number of times a link was clicked in an email. For example, if your email has 20 total clicks and 5 links, then the average clicks would be 4.                                             | The average clicks metric is important because it can represent a high level of average interaction with your email. It can also signify that the content is effective at engaging your contacts. |
| **Individual URLs Clicked (Legacy)** | The **Clicks** tab includes detailed information for each URL clicked in a message.  
  **Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.  
  For each URL that is clicked in a message, you can view metrics about the URL on the detailed clicks report page when viewing a message, delivery group, workflow, or AMR report. This includes the display name of the URL (the text between the anchor tags), the full URL, the total number of times the URL was clicked, and the number of clicks. |                                                                                                                                 |
<p>| <strong>Total Clicks Per Link</strong> | The total clicks per link metric represents the total number of times a specific link was clicked in a particular message, delivery, A/B split test, automated message rule, or delivery group. If a contact clicks link A in your message 10 times, then 10 clicks would be recorded for that particular link. | The total clicks per link metric is important because it represents a level of contact engagement beyond just opens and highlights the effectiveness of specific links. |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Of Total Clicks</td>
<td>The percent of total clicks metric represents the percentage of times a specific link was clicked, compared to the total number of clicks recorded for the message, delivery, A/B split test, automated message rule, or delivery group.</td>
<td>The percent of total clicks metric is important because it highlights the effectiveness of a particular link used in your message, delivery, A/B split test, automated message rule, or delivery group.</td>
</tr>
<tr>
<td>Clicks Per Link</td>
<td>The clicks per link metric is a link-centric metric that represents the clicks (unique clicks) recorded for a link contained in a particular message, delivery, A/B split test, automated message rule, or delivery group. This metric can be viewed in the table at the bottom of detailed click reports for a message, delivery, automated message rule, A/B split test, or delivery group. A click per link is recorded the first time a link is clicked. If a link is clicked 9 times, 1 click per link will be recorded for that link. If 5 different links are each clicked 10 times, then 1 click will be recorded for each of the 5 links.</td>
<td>The clicks per link metric is important because it can provide some clarification to both the total clicks metric and the total clicks per link metric. For example, let's say for some reason a contact clicks a link 100 times. Those 100 clicks will show up in the total clicks metric, as well as the total clicks per link metric for that link. Be careful, however, as this may be a bit misleading. Let's say this was the only contact who clicked on this link. Sure there are a 100 total clicks and 100 total clicks per link, but it's all from the same contact! If you were to look at the clicks per link for the link, you would be able to spot this because the clicks per link would show only 1.</td>
</tr>
</tbody>
</table>

Tip:

You can pass in an entire link via a field tag or API message tag. For example, you could pass in:

```html
<a href="%sometag%">My Site</a>
```

This link will be tracked. When viewing a click report for the message or delivery, the links created using field tags or API message tags (and their associated metrics) will appear in the grid showing link level metrics as All Dynamic Links.

Delivery Reports: URLs Clicked Heat Map (Legacy)

The Clicks tab on delivery reports includes a heat map you can use to see the number of times individual URLs were clicked.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

In addition to the individual URLs clicked metrics, delivery reports also provide an overlay of the email that shows how many times each link was clicked.
The Conversions tab on reports provides detailed information about message conversions.

Important: This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The following report types contain detailed conversion metrics:

- Message Reports (Legacy) on page 682 In addition to the conversion information shown below, you can view additional information about order conversions for message reports. For more information about this, see Individual Conversions From A Message (Legacy) on page 732 if you are not using Order Service or Order Service: Conversion And Order Metrics (Legacy) on page 733 if you are using Order Service.
- Delivery Reports (Legacy) on page 684 In addition to the conversion information shown below, you can view additional information about order conversions for delivery reports. For more information about this, see Individual Conversions From A Message (Legacy) on page 732 if you are not using Order Service or Order Service: Conversion And Order Metrics (Legacy) on page 733 if you are using Order Service.
- Delivery Group Reports on page 688
- Delivery Recipient Reports on page 686
- A/B Split Test Report on page 689
- Workflow Reports on page 700
- AMR Reports on page 701 In addition to the conversion information shown below, you can view additional information about order conversions for message reports. For more information about this, see Individual Conversions From A Message (Legacy) on page 732 if you are not using Order Service or Order Service: Conversion And Order Metrics (Legacy) on page 733 if you are using Order Service.

Below is a list of all the metrics shown on a detailed conversion report, with a description of what each metric represents.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Email Orders</td>
<td>The Email Orders metric represents orders made from emails you sent from the application. These orders are the result of a contact clicking through an email you sent them and then placing an order. These orders have specific emails sent from the application associated with them. When a contact places an order as a result of being sent an email, a conversion is recorded. From a single conversion, multiple orders can be made. It is possible to have more orders than conversions. For example, if a contact clicks from an email to your site, purchases a shirt, and then also decides to purchase a hat, that could represent 2 orders made from 1 conversion.</td>
<td>The Email Orders metrics is important because it allows you to see the number of orders directly tied to your email marketing efforts. Because a contact clicked though an email you sent them from the application, we are able to associate that order with a specific delivery and contact.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Revenue Per Order</td>
<td>The Revenue Per Order metric represents the average revenue generated per order tracked in your account.</td>
<td>The Revenue Per Order metric is important because it gives you an idea of how much contacts are spending, on average, each time an order is made.</td>
</tr>
</tbody>
</table>

**Individual Conversions From A Message (Legacy)**

The Conversions tab on a message, delivery, or AMR report displays detailed conversion metrics for orders.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.
For each conversion recorded for a message, you can view metrics about the conversion on the detailed conversions report page when viewing a message, delivery, or AMR report.

The conversions are sorted by description. You can view the number of orders made for each conversion, the number of contacts who converted, average revenue per order, and the total revenue from the conversion.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Order ID / SKU</strong></td>
<td>The order ID represents the unique identifier for a particular order. SKU IDs represent the IDs for individual products that make up an order. Orders are not required to have SKU IDs associated with them. If the Order has one SKU ID associated with it, there will be a backslash between the order ID and the SKU ID, with the order ID appearing on the left. If the order contains more than one SKU ID, there will be an arrow to the left of the order ID that you can click to drill-down and view the SKU IDs for the order.</td>
<td>The order ID and SKU ID are the unique identifiers for orders and products. These IDs are often used to sync this data with another system.</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>The name passed in for an order or product SKU. You are not required to pass in a name for orders or SKUs.</td>
<td>Passing in a name for an order and a SKU allows you to apply a human readable label to an order and a SKU.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Category</td>
<td>The category passed in for the order or product SKU. You are not required to pass in a category for orders or SKUs.</td>
<td>Passing in a category for orders and product SKUs allows you to group orders and SKUs together using a human readable label.</td>
</tr>
<tr>
<td>Description</td>
<td>The description passed in for the order or product SKU. You are not required to pass in a description for orders or SKUs.</td>
<td>Passing in a description for orders and product SKUs allows you to attach a human readable description that provides additional detail beyond name and category.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The total number of products purchased per order and SKU ID. For an order, the quantity represents the number of products purchased in the order. If there is only one product SKU ID for the order, the quantity will represent the total number times that specific product was purchased in the order. If the order contains multiple product SKU IDs, you can drill-down to each SKU ID to see the total number of products purchased for each SKU ID. If a contact purchases more than one of a specific product, you will see the number purchased and the unit price for the product. For example, 3 @ $10.00.</td>
<td>SKU IDs usually correspond to a product. In an order, if a contact purchases more than one of a given product, you can easily scroll down to the SKU ID to view how many of that particular product the contact purchased.</td>
</tr>
<tr>
<td>Revenue</td>
<td>The total revenue per order and product SKU.</td>
<td>Tracking revenue allows you to see the monetary impact of your marketing efforts.</td>
</tr>
<tr>
<td>Contact</td>
<td>The email address of the contact who placed the order.</td>
<td>Knowing which contact placed an order can help you create more specific segments and spot trends in contact purchase history.</td>
</tr>
<tr>
<td>Date/Time</td>
<td>The date and time the order was recorded.</td>
<td>Knowing when an order was placed is important for reporting and segmenting purposes. For example, you can use this data to send an email to all contacts who placed an order in the past month.</td>
</tr>
</tbody>
</table>

**Report: Sharing Metrics (legacy)**

The Sharing tab on reports displays detailed metrics about message sharing.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The following report types contain Sharing metrics:

- [Message Reports (Legacy)](page) on page 682
- [Delivery Reports (Legacy)](page) on page 684
- [Delivery Group Reports](page) on page 688

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Below is a list of all the metrics shown on a detailed sharing report with a description of what each metric represents.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Forwards To A Friend</strong></td>
<td>The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link.</td>
<td>The forwards to a friend metric is important because it highlights both contact engagement, and the effectiveness of the email you sent. If a contact makes the effort to use the forward to a friend link, most of the time it means they found the email you sent them compelling enough to forward it to a friend.</td>
</tr>
<tr>
<td><strong>Contacts Who Shared (email)</strong></td>
<td>The contacts who shared metric represents the number of contacts who used the social sharing links contained in the email. For example,</td>
<td>The contacts who shared metric is important because it allows you to see how many contacts used at least 1 of the social sharing links contained in an email message you sent them.</td>
</tr>
<tr>
<td></td>
<td>• Contact A clicks the Facebook sharing link</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Contact B clicks the Twitter and LinkedIn sharing links</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Contact C clicks the Facebook and Twitter sharing links</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Then 3 is recorded for the Contacts Who Shared metric.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Forward to a friend URLs are not included in the total social shares metric.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Total Social Shares (email)**    | The total social shares metric represents the total number of times social sharing links contained in the email were clicked. For example, if one contact uses the Twitter social sharing link, and another contact uses the Facebook social sharing link, then 2 would be recorded for the total social shares.  
>Note: Forward to a friend URLs are not included in the total social shares metric.  
**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The total social shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the social sharing links, then most likely it means they found the email you sent them compelling enough to share it with one of their social networks. |
| **Social Views (email)**           | The social views metric represents the total number of times an email shared via social sharing links was viewed.  
>Note: Views will be counted for anyone that views the email shared via social sharing links, not just contacts in your account. Forward to a friend URLs are not included in the social shares metric.  
**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The social views metric is important because it allows you to see how effective the email you sent is after it has been shared via social sharing links. This metric can give you insight into the effectiveness of using social sharing links in your emails, as well as the effectiveness of your emails with an audience outside your contacts. |
| **Likes (Facebook)**               | The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.  
>Note: Due to the way Facebook’s API works, it may take up to 24 hours for metrics from Facebook to appear. | The Facebook likes metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. Generally speaking, it is a positive thing if someone takes the time to like your Facebook post. |

### Individual Shares (Legacy)

For each share recorded for a message, you can view metrics about the share on the detailed **Sharing** tab.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

You can view the email address of the contact who shared, the time they shared it, the network it was shared on, and the number of views the share received.
## Metrics By Delivery Report Metrics (Legacy)

The Metrics By Delivery tab on reports provides a quick view of the metrics associated with the deliveries of the message.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The following report types contain Metrics By Delivery Report metrics:

- Message Reports (Legacy) on page 682
- Delivery Group Reports on page 688
- Workflow Reports on page 700

![Metrics By Delivery Report](image)

**Note:** If you see a particular delivery you want to know more about, click the on the subject to go to the delivery report for that delivery.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td></td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: <em>Accepted</em></td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Opens</td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Clicks</td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Revenue Per Email</td>
<td>The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The Revenue Per Email metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>

**Metrics By Delivery: Individual Deliveries (Legacy)**

The table on the **Metrics By Delivery** tab contains detailed metrics about each delivery.

**Important:** This help topic does not apply to any New Reports. If you're using Bronto's latest report format, please refer to the help topics for new reports.

The table below contains more information about each metric contained in the table.

**Note:** Test deliveries are included in this table.

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name: Subject</td>
<td>The Message Name: Subject column displays the name of the email message and the subject line. <strong>Note:</strong> When searching for an email delivery or sorting the Message Name: Subject column, you can only search and sort based on the email message name. You can not search or sort based on the subject. <strong>Note:</strong> If the message was used in a remail delivery, the word Remail will appear at the beginning of the subject line. Remails (also know as remarketing) allow you to send a follow-up email to contacts as a reminder or to persuade them to continue along the conversion process.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| Delivery Type | The delivery Type represents the type of send. Each type is described below:  
- Normal - The Normal email delivery type represents a regular email delivery sent to more than one contact.  
- Bulk - The Bulk email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.  
- Skipped - The Skipped email delivery type represents email messages that were skipped by Bronto and not sent.  
- Single Contact - The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.  
- Test - The Test email delivery type represents email deliveries that were sent as test deliveries.  
- AMR - The AMR email delivery type represents email deliveries that were sent via an Automated Message Rule.  
- Split Group - The Split Group email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.  
- FTAF - The Forwards to a Friend email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.  
- Transactional - The Transactional email delivery type represents email deliveries were sent as transactional emails.  

**Note:** A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.  

Note: Transactional deliveries are hidden by default. For information on how to show them, see View Transactional Email Deliveries on page 1014. | N/A |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| Status      | The Status column indicates the state of the delivery or post. Each status is described below:  
  • *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  • *Partially Sent*  
  • *Canceled*  
  • *Successful* | N/A |
<p>| Recipients  | The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column. | N/A |</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Send Date** | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  - 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  - 📅 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |
| **Sent** | The emails sent metric represents the total number of emails that were sent.  
  Note: Deleted email deliveries will still be counted as part of the emails sent metric. | The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered. |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Contact Loss Rate (email)</td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

**AMR Metrics By Day Report Metrics**

The **Metrics By Day** tab on automated message rule reports display an aggregate of all the metrics associated with all the days an automated message rule has been sending.

To view the metrics associated with the each day the automated message rule has been active, click at the top of an automated message rule report. If you see a particular day you want to know more about, click on the send date.

<table>
<thead>
<tr>
<th>Sent</th>
<th>Delivered</th>
<th>Opens</th>
<th>Clicks</th>
<th>Conversions</th>
<th>Revenue Per Email</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>17,120</td>
<td>17,036</td>
<td>9,392</td>
<td>1,898</td>
<td>421</td>
<td>$10.52</td>
<td>$179,177.77</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: <em>Accepted</em></td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td></td>
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<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue Per Email</td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Automated Message Rule Individual Deliveries Metrics**

The table on the [Metrics By Day](#) page contains detailed metrics about each day a delivery was made by the automated message rule.

The table below contains more information about each metric contained in the table.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| **Send Date** | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
• 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
• 🌋 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A             |
| **Status** | The Status column indicates the state of the delivery or post. Each status is described below:  
• *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
• *Partially Sent*  
• *Canceled*  
• *Successful* | N/A             |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipients</td>
<td>The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column.</td>
<td>N/A</td>
</tr>
<tr>
<td>Sent</td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
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<td>Metric</td>
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<td>Why It's Useful</td>
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<tr>
<td>--------------------------------</td>
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<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td><strong>Contact Loss Rate (email)</strong></td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

**Report Profiler**

Profiler allows you to view delivery, message, and delivery group metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes.

With profiler, you can build the profiles you want to view metrics about. For example, if you have a custom field of **Gender** with options of **Male** and **Female** in Bronto, you may look at the delivery metrics for contacts who are **Male** versus contacts who are **Female**. Once the Profile has been created, you may add the contacts to lists or create custom segments.

**Create A Profile For A Report**

Profiler allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For example, if you have a custom field of "Gender" with options of "Male" and "Female" in Bronto, you may look at the delivery metrics for contacts who are "Male" versus contacts who are "Female." Once the Profile has been created, you may add the contacts to lists or create custom segments.

To create a Profile for a message report:

1. Navigate to a report.
2. Click Profiler.
3. Click Add Metrics.
4. Select which metric you want to use in the Profile. You can select:
   - Fields - Click the Fields tab to select a field.
   - Lists - Click the Lists tab to select a list
5. Select either a field or a list from the grid.
6. If you selected
   - A field - Enter or select field options for the selected field in the Select/Enter Field Options section. The field options you will select or enter depend on the type of field you select.
   - A list - Select one of the following from the pull-down menu:
     - On List
     - Not On List
7. Click Add Selected Metrics.
8. Optional: To add another metric, click Add Metrics.
9. Optional: Click Save Changes to save the current configuration for the Profile.

Saving a Profile allows you to save the selected metrics and metric options for a Profile. When you return to the report, you can recalculate the Profile to get up to date data for the Profile.

Remove A Selected Metric From A Profile
To remove a selected metric from a Profile:
1. Navigate to a report for a message, delivery, or delivery groups.
2. Click Profiler.
3. If
   - No Profile has been created, create a Profile.
   - A Profile has already been created, skip to the next step.
4. Hover over the metric you want to remove.
5. Click the X.

Edit A Selected Metric In A Profile
To edit a selected metric in a Profile:
1. Navigate to a report for a message, delivery, or delivery groups.
2. Click Profiler.
3. If
   - No Profile has been created, create a Profile.
   - A Profile has already been created, skip to the next step.
4. Hover over the metric you want to edit.
5. Click the pencil icon.
Copy A Selected Metric In A Profile
To copy a selected metric from a Profile:
1. Navigate to a report for a message, delivery, or delivery groups.
2. Click Profiler.
3. If
   • No Profile has been created, create a Profile.
   • A Profile has already been created, skip to the next step.
4. Hover over the metric you want to copy.
5. Click the copy button.

Calculate A Profile
When the Profile has finished calculating, the last calculated time will appear next to the Calculate link.
To calculate a Profile:
1. Navigate to a report for a message, delivery, or delivery groups.
2. Click Profiler.
3. If
   • No Profile has been created, create a Profile.
   • A Profile has already been created, skip to the next step.
4. Click Calculate.

The Profile will begin calculating.

Note: This process can take up to 20 minutes.

You'll be notified via the in-app notification system when this calculation is complete. Your most recent counts will be available the next time you return to this page.

Save A Profile
Saving a Profile allows you to save the selected metrics and metric options for a Profile. When you return to the report, you can recalculate the Profile to get up to date data for the Profile.

To save a Profile:

1. Navigate to a report for a message, delivery, or delivery groups.
2. Click **Profiler**.
3. If
   - No Profile has been created, create a Profile.
   - A Profile has already been created, skip to the next step.
4. Click **Save Changes**.

**Customize The Columns Shown On A Profile**

To customize the columns shown on a Profile:

1. Navigate to a report for a message, delivery, or delivery groups.
2. Click **Profiler**.
3. If
   - No Profile has been created, create a Profile.
   - A Profile has already been created, skip to the next step.
4. Profiles allow you to view Sent, Bounced, Opened, Clicked, and Converted metrics. If
   - All these metrics are currently shown and you want to hide one of them, hover over the name of the metric you want to hide and click the X.
   - One or more of the metrics is already hidden and you want to show it, click **Customize Activities**.

5. If you clicked **Customize Activities**:
   a) Click the checkbox next to the metric you want to show.
   b) Click **Update Selections**.

**Add The Contacts In A Profile To A List**

After a Profile has been calculated, you can add the contacts currently in the Profile to a list.

To add the contacts in a Profile to a list:

1. Navigate to a report for a message, delivery, or delivery groups.
2. Click **Profiler**.
3. If
• No Profile has been created, create a Profile.
• A Profile has already been created, skip to the next step.

4. Calculate the Profile if it is not already up to date.

5. Click **Add Contacts To List**.

6. Click the

   • **Existing List** radio button to add the contacts to an existing list.
   
   You can use the search box to search for a specific list.

   • **New List** radio button to add the contacts to a new list.

   If you click the **New List** radio button, you will need to specify an Internal Name and an External Name for the list.

7. Click **Submit**.

**Add Specific Contacts In A Profile To A List**

For specific contacts currently in a Profile, you can add those contacts to a list. For example, let's say you have a Profile that shows the **Gender** field with the **Male** option selected. If you click the cell that shows the **Converted** metric for the **Male** field option, you can create a list of contacts matching the field Gender with selected option Male, who also Converted from this message.

To create list based on metrics shown in a Profile:

1. Navigate to a report for a message, delivery, or delivery groups.

2. Click **Profiler**.

3. If

   • No Profile has been created, create a Profile.

   • A Profile has already been created, skip to the next step.

4. Calculate the Profile if it is not already up to date.

5. Click the cell that shows the metric for the selected option you want to create a list for.

   The metric must be greater than zero in order to add contacts to a list.

6. Click the **Add To New List** or **Add To Existing List** radio button.

   If you selected **Add To New List**:

   a) Add an internal name for the new list in the **Internal Name** text box.

   b) Add an external name for the new list in the **External Name** text box.

   c) Add a description for the new list in the **Description** text box.

   If you selected **Add To Existing List**:

   a) Click **Select A List**.

   b) Click on the name of a list.

   c) Click **Select List**

7. Click **Apply Action**.
Add Specific Contacts In A Profile To A Segment

For any metric shown in a Profile, you can create a segment for that metric. For example, Let's say you have a Profile that shows the Gender field with the Male option selected. If you click the cell that shows the Converted metric for the Male field option, you can create a segment of contacts matching the field Gender with selected option Male who also Converted from this message.

To create segments based on metrics shown in a Profile:

1. Navigate to a report for a message, delivery, or delivery groups.
2. Click Profiler.
3. If
   • No Profile has been created, create a Profile.
   • A Profile has already been created, skip to the next step.
4. Calculate the Profile if it is not already up to date.
5. Click the cell that shows the metric for the selected option you want to create a segment for.
6. If the metric in the cell is greater than zero, click the Create New Segment radio button.
7. Add a name for the new segment.
8. Click Apply Action.

Comparison Reports

Comparison reports allow you to add multiple items to a single report and compare their metrics.

You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

Add Items To A Comparison Report

When viewing a Comparison report, you can add up to six additional items (deliveries, messages, automated message rules, or delivery groups) using the buttons located in the item columns.

To add additional items to a Comparison report:

2. Click Add Delivery, Add Message, Add Automated Message Rule, or Add Delivery Group, depending on which item you want to add.
3. In the window that appears, click in the row associated with item you want to add.
   You can use the search box to search for specific items to add.
4. Click Select.
5. To filter a report on the comparison report by date:
   a) Click the calendar icon for the first report.
      The calendar icon is below the subject.
b) Select a date filter from the list of available filters.

If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.

When you filter a report by a date range, report metrics in gray bars and graphs may vary from the metrics in report grids because these datasets are collected differently. Metrics provided in bars and graphs are based on the event date. Metrics provided in report grids, like the grid on the Clicks tab, are based on the delivery date.

c) To use a custom date range, click Custom and add a start and an end date in the date boxes.

d) To remove the filter, click the calendar icon and then click on All Time.

**Filter By Date Range On A Comparison Report**

You can filter reports on a comparison report to compare metrics within a different date range. For example, you could build a comparison report to compare deliveries made this month with deliveries made last month.

You can select from predefined date ranges, or set a custom date range.

To filter a report by date range:

1. Navigate to a comparison report.
2. If the comparison report does not already contain reports, add them.
   
   For more information see Add Items To A Comparison Report on page 756.
3. Click the calendar icon on one of the reports.
   
   The calendar icon is below Subject:
4. Select a date filter from the list of available filters.
   If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.
5. To use a custom date range, click **Custom** and add a start and an end date in the date boxes.

6. Repeat the previous steps for each report on the comparison report.
   When you are done you will see different report metrics based on the date ranges you selected.

7. To remove the date filter from a report, click the calendar icon and then click on **All Time**.

**Re-Order Columns In A Comparison Report**

Re-ordering columns in a Comparison report allows you to arrange items you have added to the report.
To re-order columns in a Comparison report:
2. Click the left and right arrows in the header of a specific column.

**Remove Items From A Comparison Report**

To remove an item from a Comparison report:

2. Click the X next to the name of the item you want to remove.

**Download A Comparison Report**

Comparison reports can be downloaded immediately or automatically at time intervals of your choosing.

To schedule and download a Comparison report:

2. Click Download.
3. Optional: In the Send To: text box, add the email addresses of any people you want to notify once the report has finished generating. Separate different email addresses using a comma.

   The email will contain a preview of the metrics included in the full report, along with a link to access the report. You can also add a subject line in the Subject Line text box, and a note in the Note text box.

   The text included in the Note text box will appear in the body of the email.

4. Choose a time to generate the report. It can either be generated immediately, or at a specific time and interval.
   To generate the report immediately, click the Generate Report Now radio button. You will be notified via an in-application notification (and an email if you provided notification email addresses above) when the report is ready to download. To generate the report at a specific time, click the Generate At Specific Date And Time radio button, and then choose a date and time using the date and time picker. You can also have the report generated at recurring intervals by clicking the Generate At Recurring Interval checkbox, and then choosing the interval using the pull-down menu. You can select:
   - Daily
   - Weekly
   - Bi-Weekly
   - Monthly
   - Quarterly
• Yearly

The notification email above will be sent when the report has finished generating and is ready to view.

5. Click Save.

View Overview Information For Items Added To A Comparison Report

The Overview section contains information about the item (delivery, message, automated message rule, delivery group) you are comparing.

You can find out the following information:

• Type of item added - This at the top of the Overview section. Depending on the item you added, it will say:
  • Delivery
  • Message
  • Automated Message Rule
  • Delivery Group
• Name - Directly below the item name will be the name of the item added. The list below explains what name is shown for each item added:
  • Delivery - The name of the message used in the delivery is shown.
  • Message - The name of the message is shown.
  • Automated Message Rule - The name assigned to the automated message rule is shown.
  • Delivery Group - The name assigned to the delivery group is shown.
• Subject - The subject displays the subject line used. If multiple subjects were used, as is often the case when comparing messages, automated message rules, or delivery groups, you will see Multiple Subjects displayed for the subject.

To view the overview information on a Comparison report:

Go to Reports > Comparison Report.

View Overview Metrics For Items Added To A Comparison Report

The Overview metrics shown on a Comparison report allow you view the high-level metrics associated with an item added to the report.
To view the overview metrics on a Comparison report:

Go to **Reports > Comparison Report**.

You can view the following metrics:

>Note: The highest rates in this section will be highlighted green, and the lowest rates will be highlighted red.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Send Date</strong></td>
<td>The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• 🌡️ - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 🌡️ - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week</td>
<td></td>
</tr>
<tr>
<td><strong>Recipients</strong></td>
<td>The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><em>Times Sent (Messages Only)</em></td>
<td>The number of deliveries scheduled using the message. This is not the same as the <em>Sent</em> metric which represents the number of emails sent.</td>
<td>N/A</td>
</tr>
<tr>
<td><em>Sent</em></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td><em>Delivery Rate</em></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: <em>Accepted Rate</em></td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td><em>Open Rate</em></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em>  The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>

**View Comparison Report Detailed Open Metrics**

The *Opens* page on a Comparison report displays the detailed opens metrics for the items you are comparing.
To view detailed open metrics on a Comparison report:

2. Click Opens.

**Comparison Report Detailed Open Metrics**

You can view the following metrics:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Delivered</em></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><em>Opens</em></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
</tbody>
</table>

Tip: The lowest rates in this section will be highlighted green, and the highest rates will be highlighted red. With contact loss metrics, the lower numbers/rates, the better.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Loss</strong></td>
<td>The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see Contact Status on page 1083</td>
<td>The contact loss metric is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under contact loss, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><strong>Email Unsubscribes (From Unsubscribes)</strong></td>
<td>The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.</td>
</tr>
<tr>
<td><strong>From Complaint (email)</strong></td>
<td>The Complaint (From Complaint) metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.</td>
<td>The Complaint (From Complaint) metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP or via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application.</td>
</tr>
<tr>
<td><strong>Inactive Due To Bounces (email)</strong></td>
<td>The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. The bounce limit represents the number of times emails sent to a particular contact can consecutively bounce before the contact is made inactive. Once a contact is made inactive, you can no longer send to them until they once again opt-in to receiving marketing emails from you.</td>
<td>The inactive due to bounces metric is important because it better clarifies why you are losing contacts. If you notice a high number under inactive due to bounces, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

**Tip:** For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

**Tip:** For more information on setting the bounce limit in your account, see Set A Bounce Limit For Your Account on page 1330.
**Tip:** The lowest rates in this section will be highlighted green, and the highest rates will be highlighted red. With undeliverable metrics, the lower numbers/rates, the better.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undeliverable (email)</td>
<td>The email undeliverable metric represents the number of sent emails that were not delivered.</td>
<td>The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.</td>
</tr>
<tr>
<td>Hard Bounce (email)</td>
<td>Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.</td>
<td>The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td>Soft Bounce (email)</td>
<td>Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.</td>
<td>The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.</td>
</tr>
</tbody>
</table>

**Tip:** For more information on the bounce classification system, see Email Bounce on page 196.

**Tip:** The highest rates in this section will be highlighted green, and the lowest rates will be highlighted red.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| *Forwards To A Friend*     | The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link.  
**Tip:** For more information on adding a forward to a friend link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on forward to a friend webforms, see Types of Webforms on page 204. | The forwards to a friend metric is important because it highlights both contact engagement, and the effectiveness of the email you sent. If a contact makes the effort to use the forward to a friend link, most of the time it means they found the email you sent them compelling enough to forward it to a friend. |
| *Contacts Who Shared (email)* | The contacts who shared metric represents the number of contacts who used the social sharing links contained in the email. For example,  
- Contact A clicks the Facebook sharing link  
- Contact B clicks the Twitter and LinkedIn sharing links  
- Contact C clicks the Facebook and Twitter sharing links  
Then 3 is recorded for the Contacts Who Shared metric.  
**Note:** Forward to a friend URLs are not included in the total social shares metric.  
**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The contacts who shared metric is important because it allows you to see how many contacts used at least 1 of the social sharing links contained in an email message you sent them. |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| **Total Social Shares (email)** | The total social shares metric represents the total number of times social sharing links contained in the email were clicked. For example, if one contact uses the Twitter social sharing link, and another contact uses the Facebook social sharing link, then 2 would be recorded for the total social shares.  
  
  **Note:** Forward to a friend URLs are not included in the total social shares metric.  
  
  **Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The total social shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the social sharing links, then most likely it means they found the email you sent them compelling enough to share it with one of their social networks. |
| **Social Views (email)**    | The social views metric represents the total number of times an email shared via social sharing links was viewed.  
  
  **Note:** Views will be counted for anyone that views the email shared via social sharing links, not just contacts in your account. Forward to a friend URLs are not included in the social shares metric.  
  
  **Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The social views metric is important because it allows you to see how effective the email you sent is after it has been shared via social sharing links. This metric can give you insight into the effectiveness of using social sharing links in your emails, as well as the effectiveness of your emails with an audience outside your contacts. |
| **Contact Updates (email)** | The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.  
  
  **Tip:** For more information on adding a manage preferences link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on manage preferences webforms, see Types of Webforms on page 204. | The contact updates metric is important because it allows you to see how many contacts updated their information via a manage preferences link contained in an email you sent them. If you notice that the contact updates number is high, you should dig a little deeper and find out what contacts are doing once they get to the manage preferences page. Depending on the actions they are taking on the manage preferences page, you may need to re-work the content of the email, or re-evaluate the list or segment you are sending to. |
Tip: The highest rates in this section will be highlighted green, and the lowest rates will be highlighted red.

**Related Topics**

**Contact Status** on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

**Email Bounce** on page 196
An email bounce is an automated message about a delivery failure.

**View Detailed Click Metrics On Delivery Reports**

The **Clicks** page on a comparison report displays the clicks metrics across the items you are comparing.

To view detailed click metrics on a Comparison report:

1. Go to **Reports > Comparison Report**.
2. Click **Clicks**.

**Delivery Report Detailed Click Metrics**

You can view the following metrics:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through</td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
</tbody>
</table>

**Comparison Report Delivered Metrics**

![Comparison Report Delivered Metrics](image)
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Clicks</td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through</td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
</tbody>
</table>
| Click Through Rate | The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.                                                                                   | The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.  
**Tip:** The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858. |

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicks</td>
<td>3,720</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>6,417</td>
</tr>
<tr>
<td>Click Rate</td>
<td>49.2%</td>
</tr>
<tr>
<td>Click-Through Rate</td>
<td>24.9%</td>
</tr>
<tr>
<td>Average Clicks</td>
<td>1.73</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <strong>Click Through</strong></td>
</tr>
</tbody>
</table>
| **Total Clicks**| The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe  
• clicks link A 10 times  
• and clicks link B 5 times  
And Taylor Doe  
• clicks link B 5 times  
Then 20 total clicks are recorded.                                                                 | The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest. |
<p>| <strong>Click Rate</strong>  | The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <strong>Click to Open Rate (CTO)</strong> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range. | The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are. |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click Through Rate</td>
<td>The click through rate represents the number of clicks that were recorded,</td>
<td>The click through rate gives you an overall indication of contacts who, first</td>
</tr>
<tr>
<td></td>
<td>as compared to the number of emails delivered.</td>
<td>received your message, and second, were engaged enough to open it and click on a</td>
</tr>
<tr>
<td></td>
<td></td>
<td>link.</td>
</tr>
<tr>
<td><strong>Tip:</strong></td>
<td></td>
<td>The click through rate metric is a legacy calculation. For a more useful</td>
</tr>
<tr>
<td></td>
<td></td>
<td>calculation, we suggest you view the click rate. The click rate is determined</td>
</tr>
<tr>
<td></td>
<td></td>
<td>by the number of unique clicks over the number of opens. For more information</td>
</tr>
<tr>
<td></td>
<td></td>
<td>on the click rate, see Click Rate Metric on page 858.</td>
</tr>
<tr>
<td>Average Clicks</td>
<td>The average clicks metric represents the average number of times a link was</td>
<td>The average clicks metric is important because it can represent a high level of</td>
</tr>
<tr>
<td></td>
<td>clicked in an email. For example, if your email has 20 total clicks and 5</td>
<td>average interaction with your email. It can also signify that the content is</td>
</tr>
<tr>
<td></td>
<td>links, then the average clicks would be 4.</td>
<td>effective at engaging your contacts.</td>
</tr>
</tbody>
</table>

**View Comparison Report Detailed Conversion Metrics**

The conversions page on a comparison report displays the conversions metrics across the items you are comparing. To find out more detailed information about the metrics related to conversions, click **Conversions** on a comparison report. Below is a list of all the metrics shown on the detailed conversion page for a comparison report, along with a description of what each metric represents.

- **Clicks vs. Conversions**
  - **Conversion Rate**: 6.5%

To view detailed conversion metrics on a Comparison report:

1. Go to **Reports > Comparison Report**.
2. Click **Conversions**.

**Comparison Report Detailed Conversion Metrics**

You can view the following metrics:
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
</tbody>
</table>

Delivered Metrics

![Delivered vs. Conversions Chart](chart_url)

1.6% Conversion/Delivered
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Conversion/Delivered Rate</td>
<td>The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.</td>
<td>The conversion/delivered rate is important because it gives you an overall indication of the contacts who received your message and were also engaged enough to convert. Whether it's making a purchase or downloading a whitepaper, the ultimate goal of email marketing is to compel your contacts to perform an action. <strong>Tip:</strong> The conversion/delivered rate is a legacy calculation. For a more useful calculation, we suggest you view the conversion rate. The conversion rate is determined by the number of conversions over the number of clicks. For more information on the conversion rate, see <a href="#">Conversion Rate Metric</a> on page 864.</td>
</tr>
</tbody>
</table>
### Conversions

<table>
<thead>
<tr>
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<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Email Orders</td>
<td>The <em>Email Orders</em> metric represents orders made from emails you sent from the application. These orders are the result of a contact clicking through an email you sent them and then placing an order. These orders have specific emails sent from the application associated with them. When a contact places an order as a result of being sent an email, a conversion is recorded. From a single conversion, multiple orders can be made. It is possible to have more orders than conversions. For example, if a contact clicks from an email to your site, purchases a shirt, and then also decides to purchase a hat, that could represent 2 orders made from 1 conversion.</td>
<td>The Email Orders metrics is important because it allows you to see the number of orders directly tied to your email marketing efforts. Because a contact clicked though an email you sent them from the application, we are able to associate that order with a specific delivery and contact.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Revenue Per Order</td>
<td>The <em>Revenue Per Order</em> metric represents the average revenue generated per order tracked in your account.</td>
<td>The <em>Revenue Per Order</em> metric is important because it gives you an idea of how much contacts are spending, on average, each time an order is made.</td>
</tr>
</tbody>
</table>

### A/B Split Test Comparison Reports
A/B Split Test Comparison reports allow you to do a side-by-side comparison of each delivery made in an A/B Split Test.

### View A/B Split Test Comparison Report Delivery Info
The **Overview** section contains information about each delivery used in an A/B Split Test.

You can view the following metrics on this report:
- Name - The name you added for the split group when you created the A/B Split Test. The winner will have **Winner** next to the name.
- Split percentage - The percentage you assigned to the split group when creating the A/B Split Test.
- Subject - The subject line used for the split group.

To view delivery information on an A/B Split Test Comparison report:

1. Go to **Messages > Deliveries**.
2. In the row associated with a delivery used in an A/B Split Test, click the **Comparison Report** icon 📊.

Deliveries associated with an A/B Split Test can be found in the **All Deliveries** table by looking for **Split Group** in the **Delivery Type** column. You can sort the **Delivery Type** column by clicking the column header.

### View A/B Split Test Comparison Report Overview Metrics
The **Overview** metrics shown on an A/B Split Test Comparison report allow you to view the high-level metrics associated with deliveries used in the A/B Split Test.

To view delivery information on an A/B Split Test Comparison report:

1. Go to **Messages > Deliveries**.

2. In the row associated with a delivery used in an A/B Split Test, click the **Comparison Report** icon.

   Deliveries associated with an A/B Split Test can be found in the **All Deliveries** table by looking for **Split Group** in the **Delivery Type** column. You can sort the **Delivery Type** column by clicking the column header.

The highest rates will be green. The lowest rates will be red. The criteria used in the A/B Split Test (highest open rate, highest click rate, etc.) will be highlighted yellow across each column on the A/B Split Test Comparison report. The column representing the winning split group will be highlighted yellow. The winning criteria will have a star next to it. The final group represents the delivery made using the winning criteria after the A/B split test has completed.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Send Date</strong></td>
<td>The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 📅 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Recipients</td>
<td>The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column.</td>
<td>N/A</td>
</tr>
<tr>
<td>Sent</td>
<td>The emails sent metric represents the total number of emails that were sent. Note: Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
</tbody>
</table>
### Conversion Rate

The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.

The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.

### Email Revenue

The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.

The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.

---

**Download An A/B Split Test Report**

You can download a report for an A/B Split Test when viewing a Comparison report for the test.

To download a report for an A/B Split Test:

1. Go to **Messages > Deliveries**.
2. In the row associated with a delivery used in an A/B Split Test, click the **Comparison Report** icon.
   
   Deliveries associated with an A/B Split Test can be found in the **All Deliveries** table by looking for **Split Group** in the **Delivery Type** column. You can sort the **Delivery Type** column by clicking the column header.
3. Click **Download**.
4. Optional: In the **Send To:** text box, add the email addresses of any people you want to notify once the report has finished generating. Separate different email addresses using a comma.
   
   The email will contain a preview of the metrics included in the full report, along with a link to access the report. You can also add a subject line in the **Subject Line** text box, and a note in the **Note** text box.
   
   The text included in the **Note** text box will appear in the body of the email.

5. Choose a time to generate the report. It can either be generated immediately, or at a specific time and interval.
To generate the report immediately, click the **Generate Report Now** radio button. You will be notified via an in-application notification (and an email if you provided notification email addresses above) when the report is ready to download. To generate the report at a specific time, click the **Generate At Specific Date And Time** radio button, and then choose a date and time using the date and time picker. You can also have the report generated at recurring intervals by clicking the **Generate At Recurring Interval** checkbox, and then choosing the interval using the pull-down menu. You can select:

- Daily
- Weekly
- Bi-Weekly
- Monthly
- Quarterly
- Yearly

The notification email above will be sent when the report has finished generating and is ready to view.

6. **Click Save.**

**View A/B Split Test Comparison Report Detailed Open Metrics**

The **Opens** page on an A/B Split Test Comparison report displays the opens metrics across the deliveries in the A/B Split Test.

To view detailed open metrics on an A/B Split Test Comparison report:

1. Go to **Messages > Deliveries.**
2. In the row associated with a delivery used in an A/B Split Test, click the **Comparison Report** icon.

Deliveries associated with an A/B Split Test can be found in the **All Deliveries** table by looking for **Split Group** in the **Delivery Type** column. You can sort the **Delivery Type** column by clicking the column header.

3. **Click Opens.**

You can view the following metrics:
Tip: The highest rates in this section will be highlighted green, and the lowest rates will be highlighted red.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <strong>Render Rate</strong> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
</tbody>
</table>

Tip: The lowest rates in this section will be highlighted green, and the highest rates will be highlighted red. With contact loss metrics, the lower numbers/rates, the better.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Loss (email)</strong></td>
<td>The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see <a href="#">Contact Status</a> on page 1083</td>
<td>The contact loss metric is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under contact loss, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
</tr>
<tr>
<td><strong>Metric</strong></td>
<td><strong>Description</strong></td>
<td><strong>Why It's Useful</strong></td>
</tr>
<tr>
<td>------------</td>
<td>----------------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>Email Unsubscribes (From Unsubscribes)</strong></td>
<td>The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.</td>
</tr>
<tr>
<td><strong>From Complaint (email)</strong></td>
<td>The Complaint (From Complaint) metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.</td>
<td>The Complaint (From Complaint) metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP or via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application.</td>
</tr>
<tr>
<td><strong>Inactive Due To Bounces (email)</strong></td>
<td>The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. The bounce limit represents the number of times emails sent to a particular contact can consecutively bounce before the contact is made inactive. Once a contact is made inactive, you can no longer send to them until they once again opt-in to receiving marketing emails from you.</td>
<td>The inactive due to bounces metric is important because it better clarifies why you are losing contacts. If you notice a high number under inactive due to bounces, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

*Tip:* For more information on the webforms a contact can use to unsubscribe, see [Types of Webforms](#) on page 204.

*Tip:* For more information on bounces, see [Email Bounce](#) on page 196 in help.

*Tip:* For more information on setting the bounce limit in your account, see [Set A Bounce Limit For Your Account](#) on page 1330.
Tip: The lowest rates in this section will be highlighted green, and the highest rates will be highlighted red. With undeliverable metrics, the lower numbers/rates, the better.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undeliverable (email)</td>
<td>The email undeliverable metric represents the number of sent emails that were not delivered.</td>
<td>The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.</td>
</tr>
<tr>
<td>Hard Bounce (email)</td>
<td>Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.</td>
<td>The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.</td>
</tr>
<tr>
<td>Soft Bounce (email)</td>
<td>Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.</td>
<td>The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.</td>
</tr>
</tbody>
</table>

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Tip: The highest rates in this section will be highlighted green, and the lowest rates will be highlighted red.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Forwards To A Friend</strong></td>
<td>The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link.</td>
<td>The forwards to a friend metric is important because it highlights both contact engagement, and the effectiveness of the email you sent. If a contact makes the effort to use the forward to a friend link, most of the time it means they found the email you sent them compelling enough to forward it to a friend.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on adding a forward to a friend link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on forward to a friend webforms, see Types of Webforms on page 204.</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts Who Shared (email)</strong></td>
<td>The contacts who shared metric represents the number of contacts who used the social sharing links contained in the email. For example, • Contact A clicks the Facebook sharing link • Contact B clicks the Twitter and LinkedIn sharing links • Contact C clicks the Facebook and Twitter sharing links Then 3 is recorded for the Contacts Who Shared metric.</td>
<td>The contacts who shared metric is important because it allows you to see how many contacts used at least 1 of the social sharing links contained in an email message you sent them.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Forward to a friend URLs are not included in the total social shares metric.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Total Social Shares (email)** | The total social shares metric represents the total number of times social sharing links contained in the email were clicked. For example, if one contact uses the Twitter social sharing link, and another contact uses the Facebook social sharing link, then 2 would be recorded for the total social shares.  
  **Note:** Forward to a friend URLs are not included in the total social shares metric.  
  **Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The total social shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the social sharing links, then most likely it means they found the email you sent them compelling enough to share it with one of their social networks. |
| **Social Views (email)**      | The social views metric represents the total number of times an email shared via social sharing links was viewed.  
  **Note:** Views will be counted for anyone that views the email shared via social sharing links, not just contacts in your account. Forward to a friend URLs are not included in the social shares metric.  
  **Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The social views metric is important because it allows you to see how effective the email you sent is after it has been shared via social sharing links. This metric can give you insight into the effectiveness of using social sharing links in your emails, as well as the effectiveness of your emails with an audience outside your contacts. |
| **Contact Updates (email)**   | The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.  
  **Tip:** For more information on adding a manage preferences link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on manage preferences webforms, see Types of Webforms on page 204. | The contact updates metric is important because it allows you to see how many contacts updated their information via a manage preferences link contained in an email you sent them. If you notice that the contact updates number is high, you should dig a little deeper and find out what contacts are doing once they get to the manage preferences page. Depending on the actions they are taking on the manage preferences page, you may need to re-work the content of the email, or re-evaluate the list or segment you are sending to. |
Related Topics

**Contact Status** on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

**Email Bounce** on page 196
An email bounce is an automated message about a delivery failure.

**View A/B Split Test Report Detailed Click Metrics**

The **Clicks** page on an A/B Split Test Comparison report displays the click metrics across the deliveries used in the A/B Split Test.

To view detailed click metrics on an A/B Split Test Comparison report:

1. Go to **Messages > Deliveries**.
2. In the row associated with a delivery used in an A/B Split Test, click the **Comparison Report** icon.
   Deliveries associated with an A/B Split Test can be found in the **All Deliveries** table by looking for **Split Group** in the **Delivery Type** column. You can sort the **Delivery Type** column by clicking the column header.
3. Click **Clicks**.

You can view the following metrics:

**Pipeline Metrics**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------*****************************************************************************</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
</tbody>
</table>

**Delivered Metrics**

- **Delivered vs. Clicks**

- **Click Through Rate**: 24.9%
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Clicks</td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through</td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Click Through Rate</td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.</td>
</tr>
</tbody>
</table>

Tip: The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
</tbody>
</table>
| **Total Clicks** | The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe  
- clicks link A 10 times  
- and clicks link B 5 times  
And Taylor Doe  
- clicks link B 5 times  
Then 20 total clicks are recorded. | The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest. |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Click Through Rate</strong></td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.</td>
</tr>
<tr>
<td><strong>Average Clicks</strong></td>
<td>The average clicks metric represents the average number of times a link was clicked in an email. For example, if your email has 20 total clicks and 5 links, then the average clicks would be 4.</td>
<td>The average clicks metric is important because it can represent a high level of average interaction with your email. It can also signify that the content is effective at engaging your contacts.</td>
</tr>
</tbody>
</table>

**View Comparison Report Detailed Conversion Metrics**

The conversions page on a comparison report displays the conversions metrics across the items you are comparing. To find out more detailed information about the metrics related to conversions, click **Conversions** on a comparison report. Below is a list of all the metrics shown on the detailed conversion page for a comparison report, along with a description of what each metric represents.
To view detailed conversion metrics on a Comparison report:

1. Go to **Reports > Comparison Report**.
2. Click **Conversions**.

*Comparison Report Detailed Conversion Metrics*

You can view the following metrics:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicks</td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
</tbody>
</table>

Delivered Metrics
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
</tbody>
</table>

**Tip:** In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion/Delivered Rate</td>
<td>The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.</td>
<td>The conversion/delivered rate is important because it gives you an overall indication of the contacts who received your message and were also engaged enough to convert. Whether it's making a purchase or downloading a whitepaper, the ultimate goal of email marketing is to compel your contacts to perform an action. <strong>Tip:</strong> The conversion/delivered rate is a legacy calculation. For a more useful calculation, we suggest you view the conversion rate. The conversion rate is determined by the number of conversions over the number of clicks. For more information on the conversion rate, see Conversion Rate Metric on page 864.</td>
</tr>
</tbody>
</table>

<p>| Conversions                  | 242                                                                                                                                           |                                                                                                                                                                                                          |
| Conversion Rate              | 6.5%                                                                                                                                          |                                                                                                                                                                                                          |
| Orders                       | 267                                                                                                                                           |                                                                                                                                                                                                          |
| Total Revenue                | $26,374.10                                                                                                                                     |                                                                                                                                                                                                          |
| Avg. Per Order               | $98.78                                                                                                                                       |                                                                                                                                                                                                          |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a whitepaper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Email Orders</td>
<td>The <em>Email Orders</em> metric represents orders made from emails you sent from the application. These orders are the result of a contact clicking through an email you sent them and then placing an order. These orders have specific emails sent from the application associated with them. When a contact places an order as a result of being sent an email, a conversion is recorded. From a single conversion, multiple orders can be made. It is possible to have more orders than conversions. For example, if a contact clicks from an email to your site, purchases a shirt, and then also decides to purchase a hat, that could represent 2 orders made from 1 conversion.</td>
<td>The Email Orders metrics is important because it allows you to see the number of orders directly tied to your email marketing efforts. Because a contact clicked though an email you sent them from the application, we are able to associate that order with a specific delivery and contact.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Revenue Per Order</td>
<td>The <em>Revenue Per Order</em> metric represents the average revenue generated per order tracked in your account.</td>
<td>The <em>Revenue Per Order</em> metric is important because it gives you an idea of how much contacts are spending, on average, each time an order is made.</td>
</tr>
</tbody>
</table>

**Legacy Reports Dashboard**

The Legacy Reports dashboard allows you to quickly get an overview of the activity going on in your account. You can also access more detailed reports from the Legacy Reports Dashboard should you need more specific information.

To get a quick overview of the activity going on in your account, go to **Reports > Legacy Reports**.

From the **Legacy Reports** dashboard, you can view all of the available reports. Click on the name of the report to view a graph and table describing the report, as well as buttons that allow you to manipulate the report data to match the information you need. For more information on each report, click the link in the Related Topics section below that corresponds to the report you want to know more about.

**Warning:** The reports available on the **Legacy Reports** dashboard currently exclude transactional and single contact deliveries.

**Warning:** Some of the data contained in charts may not be available, depending on your data retention policy. For more information on the data retention policy, see **Data Retention Policy** on page 1509.

**Filter The Data Reports In The Reports Area**

You can use the tools described below to further filter the graphs shown in the reports area.

- You can click the metrics labels, for example, on the charts to hide/show data points for a given metric.
• The **Message** radio button allows you to change the report to show metrics for a specific message. When you click this radio button, the message picker will appear. You can use the message picker to choose the specific message you want to view metrics for.

• The **Delivery** radio button allows you to change the report to show metrics for a specific delivery. When you click this radio button, the delivery picker will appear. You can use the delivery picker to choose the specific delivery you want to view metrics for.

• The **Automated Message** radio button allows you to change the report to show metrics for a specific automated message rule. When you click this radio button, the message picker will appear. You can use the message picker to choose the specific automated message rule you want to view metrics for.

• The **Delivery Group** radio button allows you to change the report to show metrics for a specific delivery group. When you click this radio button, the delivery group picker will appear. You can use the delivery group picker to choose the specific delivery group you want to view metrics for.

• The **Date Picker** allows you to further filter the report by specifying a specific date range to show metrics for. The first date picker box is the start date, and the second date picker box is the end date.

**Cumulative Email Volume Over Time Report**

The Cumulative Email Volume Over Time Report is important because it allows you to analyze your sending habits. Once you know your sending habits, you can better select proper email allocation amounts, spot performance trends related to sending volume (for example changes in sender rating), and begin making connections between sending volume and performance metrics (opens, clicks, conversions, etc.)

To view this report, go to **Reports > Legacy Reports** and click **Cumulative Email Volume Over Time**.

**Warning:** The reports available on the **Legacy Reports** dashboard currently exclude transactional and single contact deliveries.

**Tip:** For more information on your sender rating and how it affects your account, see **Sender and Delivery Rating** on page 309.

**Message Metrics Performance Over Time Report**

The Message Performance Over Time report lets you see how messages, deliveries, delivery groups, or deliveries sent via automated message rules are performing over a given date range. This report allows you to view the relationship between the performance rates that indicate the success of your email marketing efforts. For example, you can use this report to spot differences in click rate and conversion rate for a message, and view how changes made over time have either widened or closed the gap between these rates.

To view this report, go to **Reports > Legacy Reports** and click **Message Metrics Performance Over Time**.

**Warning:** The reports available on the **Legacy Reports** dashboard currently exclude transactional and single contact deliveries.

If you wish to view metrics instead of rates, view the Message Metrics Over Time report. For more information on the Message Metrics Over Time report, see **Message Metrics Over Time Report** on page 804.

**Metrics Shown:**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Delivery Rate</em></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: <em>Accepted Rate</em></td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
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</tr>
<tr>
<td>------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <strong>Render Rate</strong> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
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<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <strong>Click to Open Rate (CTO)</strong> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
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</tbody>
</table>
### Message Metrics Over Time Report

The Message Metrics Over Time report lets you see how messages, deliveries, or deliveries sent via automated message rules are performing over a given date range. This report allows you to view the relationship between the metrics that indicate the success of your email marketing efforts. For example, you can use this report to spot differences in clicks and conversions for a message, and view how changes made over time have either widened or closed the gap between these metrics.

To view this report, go to **Reports > Legacy Reports** and click **Message Metrics Over Time**.

**Warning:** The reports available on the **Legacy Reports** dashboard currently exclude transactional and single contact deliveries.

**Tip:** The Message Metrics Over Time report displays metrics (i.e. the actual numbers). If you wish to view the rates (i.e. percentages) instead of metrics, view the Message Performance Over Time report. For more information on the Message Performance Over Time report, see [Message Metrics Performance Over Time Report](#) on page 802.

**Metrics Shown:**

<table>
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<tr>
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<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
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</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Opens</td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
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</tr>
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</table>
Report

Metric | Description | Why It's Useful
--- | --- | ---
Conversions | The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. | The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.

Tip: In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.

Message Activities By Date Report

The Message Activities By Date report lets you see the opens and clicks metrics for each date these metrics were recorded for a message, delivery, or automated message rule. This report can be especially useful if you are sending seasonal emails and need to view opens/clicks for specific days.

To view this report, go to Reports > Legacy Reports and click Message Activities By Date.

Warning: The reports available on the Legacy Reports dashboard currently exclude transactional and single contact deliveries.

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**Message Metrics After Send Report**

The Message Metrics After Send report allows you to view the metrics recorded in the hours and days after a delivery is sent. The information in this report can be used to drive decisions like optimal sending time, remarketing strategies, and even content decisions (do I need to use language that encourages contacts to act quickly). You can filter this report by message, delivery, or automated message rule.

To view this report, go to **Reports > Legacy Reports** and click **Message Metrics After Send**.

**Warning:** The reports available on the **Legacy Reports** dashboard currently exclude transactional and single contact deliveries.

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**Message Metrics By Hour Or Day Report**

The Message Metrics By Hour Or Day report lets you see what time during the day, day during the week, or day during the month your message or delivery is most effective. You use this report to determine what time of day, which day during the week, and which day during the month your message is most effective.

To view this report, go to Reports > Legacy Reports and click Message Metrics By Hour Or Day.

**Warning:** The reports available on the Legacy Reports dashboard currently exclude transactional and single contact deliveries.

**Metrics Shown:**

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**View Metrics By Hour Or Day For All Your Deliveries**

You can use the Message Metrics By Hour Or Day report to show metrics by hour or day for all the deliveries in your account. To do this:

1. Go to Reports > Dashboard.
2. Click Message Metrics By Hour Or Day.
3. Click the Delivery Group radio button.
4. Click Pick.
5. Select the All Deliveries delivery group fro the pop-up.
6. Click Select.

**Contact Growth Over Time Report**

The Contact Growth Over Time chart lets you monitor the number of contacts in your account over a given time period. You can filter the data on the report by individual lists.

To view this report, go to Reports > Legacy Reports and click Contact Growth Over Time.

**Contact Performance Over Time Report**

The Contact Performance Over Time chart displays the open rate and click rate overtime for your contacts. You can further filter this data by changing the time period and/or viewing only those contacts on specific lists or segments.

To view this report, go to Reports > Legacy Reports and click Contact Performance Over Time.

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<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
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<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
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**Contact Metrics Over Time Report**

The Contact Metrics Over Time report lets view contact specific metrics (opens and clicks) over time. You can further filter this data by changing the time period and/or viewing only those contacts on specific lists or segments.

To view this report, go to **Reports > Legacy Reports** and click **Contact Metrics Over Time**.

Metrics Shown:
### Metric

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### Contact Performance By Domain Report

The Contact Performance By Domain chart let's you see how contact performance varies across domains. This may be helpful in determining if you are having rendering or deliverability issues in some domains. You can filter this data by list, segment, top domains, open rate, click rate.

To view this report, go to **Reports > Legacy Reports** and click **Contact Performance By Domain**.

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**Sender Rating Over Time Report**

The Sender Rating Over Time report allows you to view how your sender rating has changed over a given time period.

To view this report, go to **Reports > Legacy Reports** and click **Sender Rating Over Time**.

⚠️ **Tip:** For more information on your sender rating and why it's important, see **Sender and Delivery Rating** on page 309.

**Delivery Rate Comparison Report**

The Delivery Rate Comparison report allows you to compare the delivery rate across domains for a delivery, message, or automated message rule. This report can be very useful in detecting if your are having problems sending to a specific domain.

To view this report, go to **Reports > Legacy Reports** and click **Delivery Rate Comparison**.

⚠️ **Warning:** The reports available on the **Legacy Reports** dashboard currently exclude transactional and single contact deliveries.

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</table>

**Delivery Rate By List Or Segment Report**

The Delivery Rate By List Or Segment report allows you to compare the delivery rate across domains for specific lists and segments.

To view this report, go to **Reports > Legacy Reports** and click **Delivery Rate By List Or Segment**.
**Warning:** The reports available on the Legacy Reports dashboard currently exclude transactional and single contact deliveries.

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**Delivery Rate To A Domain Over Time Report**

The Delivery Rate To A Domain Over Time report allows you to view the delivery rate overtime to a specific domain. You can use this report to spot things like changes in message content negatively effecting your delivery rate to a specific domain.

To view this report, go to Reports > Legacy Reports and click Delivery Rate To A Domain Over Time.

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**Hard Bounce Rate Over Time Report**

The Hard Bounce Rate Over Time report allows you to view the hard bounce rate for specific messages, deliveries, automated message rules, list, and segments. This allows you to better determine if hard bounces are occurring as a result of bad message content, sending to the wrong contacts, or a combination of both.

To view this report, go to Reports > Legacy Reports and click Hard Bounce Rate Over Time.

**Warning:** The reports available on the Legacy Reports dashboard currently exclude transactional and single contact deliveries.
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<tr>
<td>Hard Bounce (email)</td>
<td>Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.</td>
<td>The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.</td>
</tr>
</tbody>
</table>

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Contact Unsubscribes Over Time Report

The Contact Unsubscribes Over Time report allows you to view the unsubscribes recorded in your account over time. You can broadly view unsubscribes across all of your contacts, or get more specific and view unsubscribes that resulted from sending to a specific list or segment.

To view this report, go to Reports > Legacy Reports and click Contact Unsubscribes Over Time.

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<td>Email Unsubscribes (From Unsubscribes)</td>
<td>The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.</td>
</tr>
</tbody>
</table>

Tip: For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

Contact Unsubscribe Rate Over Time Report

The Contact Unsubscribe Rate Over Time chart displays the unsubscribe rate overtime for your contacts. You can further filter this data by changing the time period and/or viewing only those contacts on specific lists, segments, or delivery groups.

To view this report, go to Reports > Legacy Reports and click Contact Unsubscribe Rate Over Time.

Metrics Shown:
Report

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsubscribe Rate</td>
<td>The Unsubscribe Rate metric represents the percentage of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>The Unsubscribe Rate metric is important because it shows the rate at which contacts are unsubscribing. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric. You can monitor this metric overtime to see if changes to your sending habits are lowering the Unsubscribe Rate.</td>
</tr>
</tbody>
</table>

Contact Complaint Rate Over Time Report

The Contact Complaint Rate Over Time report allows you to view the complaints for all the contacts in your account, or for specific lists/segments. This report allows you to easily determine if you are sending the wrong content to the wrong group of contacts.

To view this report, go to Reports > Legacy Reports and click Contact Complaint Rate Over Time.

Metrics Shown:
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complaint Rate</td>
<td>The Complaint Rate metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.</td>
<td>The Complaint Rate is important because it better clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the Report Spam button (or similarly named button) after receiving an email from you. <strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on the sender and delivery ratings, see Sender and Delivery Rating on page 309. <strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.</td>
</tr>
</tbody>
</table>

**Complaint Rate Over Time Report**

The Complaint Rate Over Time report allows you to see the complaint rate for a specific message, delivery, or automated message rule.

To view this report, go to Reports > Legacy Reports and click Complaint Rate Over Time.

Metrics Shown:
### Complaint Rate

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complaint Rate</td>
<td>The <em>Complaint Rate</em> metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.</td>
<td>The <em>Complaint Rate</em> is important because it better clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the <strong>Report Spam</strong> button (or similarly named button) after receiving an email from you.</td>
</tr>
</tbody>
</table>

**Warning:** A high number of complaints will negatively impact your sender and delivery rating. For information on the sender and delivery ratings, see [Sender and Delivery Rating](#) on page 309.

**Tip:** For more information on fixing a low sender or delivery rating, see [Tips For Fixing A Low Email Sender/Delivery Rating](#) on page 311.

### Complaint Rate By Domain Report

The Complaint Rate By Domain report allows you to view the complaint rate for a specific ISP. This report can help you spot if you are having problems sending to a specific ISP.

To view this report, go to **Reports > Legacy Reports** and click **Complaint Rate By Domain**.

**Metrics Shown:**
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Complaint Rate</td>
<td>The Complaint Rate metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.</td>
<td>The Complaint Rate is important because it better clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the Report Spam button (or similarly named button) after receiving an email from you. <strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on the sender and delivery ratings, see <a href="#">Sender and Delivery Rating</a> on page 309. <strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see <a href="#">Tips For Fixing A Low Email Sender/Delivery Rating</a> on page 311.</td>
</tr>
</tbody>
</table>

**Complaints From ISP Feedback Loops Report**

The Complaints From ISP Feedback Loops report allows you see number of complaints per ISP you have received over a given time period.

To view this report, go to **Reports > Legacy Reports** and click **Complaints From ISP Feedback Loops Report**.

**Note:** The date/time shown for the complaints on this report are based on when the complaints were received from ISP feedback loops, and not on when the delivery that caused the complaint was made.

Metrics Shown:
### Legacy Report Downloads Page

The Report Downloads page is where you can access and download reports you have run or reports related to your contact import activity. You can access this page by going to **Reports > Legacy Downloads**.

Four tables with different report types appear on this page:

- Email and Details Contacts Exports: can include any type of report that can be downloaded such as message or delivery reports.
- Contact Export Report Downloads: contains a list of reports that are automatically run when a contact export completes.
- Contact Import Report Downloads: contains a list of reports that are automatically run when a contact import completes.
- Consent Records Export: contains consent records for site contacts (opt-in/opt-out date, status, IP address, source, etc.).

To view a report, click on the name of a report to download it, then open the file you downloaded.

Each type of report is kept on the report downloads page for the duration of your data retention period. The **Expires** field lets you know when each individual report is going to be deleted from Bronto. To permanently archive a report, click the name of the report to download it.

The fields in the tables are defined below. The first table only has a subset of these fields (**Report Name**, **Size**, **Created At**, **Expires**).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name</td>
<td>You can click the report name to download the report.</td>
</tr>
<tr>
<td>Type</td>
<td>Import action request type. Either:</td>
</tr>
<tr>
<td></td>
<td>- Add and Update: Request to <strong>Update existing contacts</strong>, <strong>Add new contacts</strong>.</td>
</tr>
<tr>
<td></td>
<td>- Add: Request to <strong>Add new contacts</strong>.</td>
</tr>
<tr>
<td></td>
<td>- Update: Request to <strong>Update existing contacts</strong>.</td>
</tr>
<tr>
<td></td>
<td>- Unsubscribe new and existing: Request to <strong>Unsubscribe both new and existing contacts</strong>.</td>
</tr>
<tr>
<td></td>
<td>- Unsubscribe existing: Request to <strong>Unsubscribe only existing contacts</strong>.</td>
</tr>
<tr>
<td></td>
<td>- Remove: Request to <strong>Remove existing contacts</strong>.</td>
</tr>
</tbody>
</table>
### Report Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>How the import was requested. Either:</td>
</tr>
<tr>
<td></td>
<td>• Manual Import: The file import was triggered using the Bronto platform.</td>
</tr>
<tr>
<td></td>
<td>• Direct Import: The file import was triggered by a direct import request.</td>
</tr>
<tr>
<td>Character Set Selected</td>
<td>Character set option that was specified as part of the import process. Selecting the incorrect character set can frequently be the cause of import issues, so this is a good place to start your investigation if your import has a lot of errors. For more information see Contact Import Character Sets on page 1096.</td>
</tr>
<tr>
<td>User</td>
<td>Login name associated with the user who triggered the import. If Not Available is displayed, then Bronto was unable to determine the login associated with the import.</td>
</tr>
<tr>
<td>Size</td>
<td>Size the downloaded file will be.</td>
</tr>
<tr>
<td>Created At</td>
<td>Date and time the report was created. This is when your contact import completed.</td>
</tr>
<tr>
<td>Expires</td>
<td>Date and time the report will be deleted from Bronto based on your data retention policy.</td>
</tr>
</tbody>
</table>

### Download A Summary of Detailed Contact Report

You can immediately download, or schedule a recurring download of, any of the reports in Bronto.

There are two types of report downloads:

- Summary reports allow you to download all of the metrics associated with a message, delivery, delivery group, automated message rule, or A/B split test.
- Detailed contact activity reports contain every action taken by every contact involved in the delivery or deliveries.

Reports can be downloaded immediately or automatically at time intervals of your choosing. If you limit a message report to only show deliveries from a specific date range, when you download a detailed or summary report, the downloaded report only contains metrics for the deliveries made within the specified date range. For more information on viewing a report for deliveries made in a specific date range, see Filter A Report By Date Range on page 852.

To download a report:

1. Go to a report.
2. Click Download. 
3. In the Report Options section, select what type of report you want download from the Generate Report pull-down menu. You can select:

   - **Summary Report** - The summary report contains a summary of all the available metrics recorded.
   - **Detailed Contact Report** - The detailed contact report contains a per contact break-down of metrics recorded.
   - **Both**

   For a detailed explanation of all the metrics contained in summary and detailed contact activity reports, see Summary Report Metrics on page 823 and Detailed Contact Activity Report Metrics on page 843.

4. Optional: Only if you select **Detailed Contact Report** or **Both**:
   a) Select which metrics you want to include in the Detailed Contact Report.
      You can select:
• All
• Sent
• Delivered
• Undeliverable
• Opens
• Click Throughs
• Conversions
• Forwards To A Friends
• Updates
• Unsubscribes
• Frequency Caps
• Onboarding Skipped

b) Click the Include Fields in Detailed Contact Report checkbox if you want to include field data in the Detailed Contact Report.

5. Optional: In the Send To: text box, add the email addresses of any people you want to notify once the report has finished generating. Separate different email addresses using a comma.

The email will contain a preview of the metrics included in the full report, along with a link to access the report. You can also add a subject line in the Subject Line text box, and a note in the Note text box.

The text included in the Note text box will appear in the body of the email.

6. Choose a time to generate the report. It can either be generated immediately, or at a specific time and interval.

To generate the report immediately, click the Generate Report Now radio button. You will be notified via an in-application notification (and an email if you provided notification email addresses above) when the report is ready to download. To generate the report at a specific time, click the Generate At Specific Date And Time radio button, and then choose a date and time using the date and time picker. You can also have the report generated at recurring intervals by clicking the Generate At Recurring Interval checkbox, and then choosing the interval using the pull-down menu. You can select:

• Daily
• Weekly
• Bi-Weekly
• Monthly
• Quarterly
• Yearly
The notification email above will be sent when the report has finished generating and is ready to view.

7. Click Save.

Summary Report Metrics
A summary report allows you to download summary metrics for a report.

Message reports maintain metrics for all deliveries, even deliveries that have been deleted. Hence, if you add up the metrics on all the available delivery reports for deliveries made from a message, it may not add up to the totals on the message report due to the presence of metrics from deleted deliveries.

Note: The metrics associated with test deliveries are not included in message reports. If you wish to view the metrics associated with a test delivery made from a message, click Show Metrics For: and choose to view a delivery report for a test delivery. Keep this in mind if you create a message and only send test deliveries from the message because all of the metrics on the message report for the message will be zero, however, there will be metrics on the delivery reports for the individual test deliveries.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| Sent    | The emails sent metric represents the total number of emails that were sent.  
Note: Deleted email deliveries will still be counted as part of the emails sent metric. | The emails sent metric is important to know for two main reasons.  
First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account.  
Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered. |
| Delivered | The emails delivered metric represents the total number of emails that were successfully delivered.  
DMA/EEC equivalent: Accepted | The Emails delivered metric is important because it let's you know how many total emails were successfully delivered.  
Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions).  
You can also figure out how many unsuccessful emails were sent. |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Opens</em></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><em>Total Opens</em></td>
<td>The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.</td>
<td>The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td></td>
<td><em>Note:</em> The total opens metric is not the same thing as the opens metric (which records unique opens). For more information on the opens metric, see <em>Opens Metric</em> on page 882.</td>
<td></td>
</tr>
<tr>
<td><em>Average Opens</em></td>
<td>The average opens metric represents the average number of times emails you sent were opened. For example, if 20 total opens and 5 emails are recorded, then the average opens would be 4.</td>
<td>The average opens metric is important because it represents an initial level of average interaction with emails you send. It can also signify that the subject line is effective and the from name is trusted.</td>
</tr>
<tr>
<td></td>
<td><em>Note:</em> Total opens and opens are not the same metric. For more information on what each metric means, see <em>Total Opens Metric</em> on page 890 and <em>Opens Metric</em> on page 882.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td><strong>Total Clicks</strong></td>
<td>The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe • clicks link A 10 times • and clicks link B 5 times And Taylor Doe • clicks link B 5 times Then 20 total clicks are recorded.</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
</tr>
<tr>
<td><strong>Average Clicks</strong></td>
<td>The average clicks metric represents the average number of times a link was clicked in an email. For example, if your email has 20 total clicks and 5 links, then the average clicks would be 4.</td>
<td>The average clicks metric is important because it can represent a high level of average interaction with your email. It can also signify that the content is effective at engaging your contacts.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Email Orders</td>
<td>The Email Orders metric represents orders made from emails you sent from the application. These orders are the result of a contact clicking through an email you sent them and then placing an order. These orders have specific emails sent from the application associated with them. When a contact places an order as a result of being sent an email, a conversion is recorded. From a single conversion, multiple orders can be made. It is possible to have more orders than conversions. For example, if a contact clicks from an email to your site, purchases a shirt, and then also decides to purchase a hat, that could represent 2 orders made from 1 conversion.</td>
<td>The Email Orders metrics is important because it allows you to see the number of orders directly tied to your email marketing efforts. Because a contact clicked though an email you sent them from the application, we are able to associate that order with a specific delivery and contact.</td>
</tr>
<tr>
<td>Revenue Per Order</td>
<td>The Revenue Per Order metric represents the average revenue generated per order tracked in your account.</td>
<td>The Revenue Per Order metric is important because it gives you an idea of how much contacts are spending, on average, each time an order is made.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Click Through Rate</strong></td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
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</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td><strong>Bounce Rate</strong></td>
<td>The bounce rate indicates the percentage of bounces (as compared to the number delivered) recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group.</td>
<td>Tip: For more information on the bounce classification system, see Email Bounce on page 196. The bounce rate metric is important because it gives you an idea of how your message is performing from a deliverability perspective. If the bounce rate is high, your sender/delivery rating will be negatively affected and contacts may not be receiving your message. The bounce rate rolls up all the types of bounces into one percentage. To determine what type of bounce occurred, you can view the following metrics which further classify and explain bounces:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Soft Bounce Metric on page 888</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Temporary Contact Issue Metric on page 889</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Destination System Temporarily Unreachable Metric on page 868</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Deferred Due To Message Content Metric on page 865</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Hard Bounce Metric on page 876</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Bad Email Address Metric on page 857</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Destination System Unreachable Metric on page 867</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Rejected Due To Message Content Metric on page 885</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
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<td>Complaint Rate</td>
<td>The <em>Complaint Rate</em> metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.</td>
<td>The <em>Complaint Rate</em> is important because it better clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the Report Spam button (or similarly named button) after receiving an email from you. <strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on the sender and delivery ratings, see <a href="#">Sender and Delivery Rating</a> on page 309. <strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see <a href="#">Tips For Fixing A Low Email Sender/Delivery Rating</a> on page 311.</td>
</tr>
<tr>
<td>Contact Loss Rate (email)</td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them. <strong>Tip:</strong> For more information on the inactive status type, see <a href="#">Contact Status</a> on page 1083</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
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<td>Metric</td>
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<td>Why It's Useful</td>
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| **Total Social Shares (email)** | The total social shares metric represents the total number of times social sharing links contained in the email were clicked. For example, if one contact uses the Twitter social sharing link, and another contact uses the Facebook social sharing link, then 2 would be recorded for the total social shares.  
**Note:** Forward to a friend URLs are not included in the total social shares metric.  
**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The total social shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the social sharing links, then most likely it means they found the email you sent them compelling enough to share it with one of their social networks. |
| **Facebook Shares**    | The Facebook shares metric represents the total number of times the Facebook social sharing links contained in emails you sent were clicked. For example, if a contact clicks the Facebook social sharing link 10 times, then 10 would be recorded for the Facebook shares metric.  
**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116.  
**Note:** Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear. | The Facebook shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the Facebook social sharing link, then most likely it means they found the email you sent compelling enough to share it with their Facebook network. |
| **Twitter Shares**     | The Twitter shares metric represents the total number of times the Twitter social sharing links contained in emails you sent were clicked. For example, if a contact uses the Twitter social sharing link 2 times, then 2 would be recorded for the Twitter shares metric.  
**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116. | The Twitter shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the Twitter social sharing link, then most likely it means they found the email you sent them compelling enough to share it with their followers on Twitter. |
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<tr>
<th>Metric</th>
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<tr>
<td>LinkedIn Shares</td>
<td>The LinkedIn shares metric represents the total number of times the LinkedIn social sharing links contained in emails you sent were clicked. For example, if a contact clicks the LinkedIn social sharing link 10 times, then 10 would be recorded for the LinkedIn shares metric.</td>
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<td></td>
<td><strong>Tip:</strong> For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td>The LinkedIn shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to click the LinkedIn social sharing link, then most likely it means they found the email you sent them compelling enough to share it with their LinkedIn network.</td>
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<tr>
<td>Digg Shares</td>
<td>The Digg shares metric represents the total number of times Digg social sharing links contained in emails you sent were clicked. For example, if a contact clicks the Digg social sharing link 10 times, then 10 would be recorded for the Digg shares metric.</td>
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<td></td>
<td><strong>Tip:</strong> For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td>The Digg shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the Digg social sharing link, then most likely it means they found the email you sent them compelling enough to share it via Digg.</td>
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<tr>
<td>MySpace Shares</td>
<td>The MySpace shares metric represents the total number of times the MySpace social sharing links contained in emails you sent were clicked. For example, if a contact clicks the MySpace social sharing link 10 times, then 10 would be recorded for the MySpace shares metric.</td>
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<td></td>
<td><strong>Tip:</strong> For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
<td>The MySpace shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to click the MySpace social sharing link, then most likely it means they found the email you sent them compelling enough to share it with their MySpace network.</td>
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<tr>
<td>Social Views (email)</td>
<td>The social views metric represents the total number of times an email shared via social sharing links was viewed.</td>
<td>The social views metric is important because it allows you to see how effective the email you sent is after it has been shared via social sharing links. This metric can give you insight into the effectiveness of using social sharing links in your emails, as well as the effectiveness of your emails with an audience outside your contacts. Note: Views will be counted for anyone that views the email shared via social sharing links, not just contacts in your account. Forward to a friend URLs are not included in the social shares metric. Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
</tr>
<tr>
<td>Facebook Views</td>
<td>The Facebook views metric represents the total number of times an email shared via a Facebook social sharing link was viewed.</td>
<td>The Facebook views metric is important because it allows you to see how effective the email you sent is after it has been shared via Facebook. This metric can give you insight into the effectiveness of using the Facebook social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts. Note: Facebook views will be counted for anyone that views the email shared via the Facebook social sharing link, not just contacts in your account. Tip: For more information on social sharing links, see Social Share Links in Emails on page 116. Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.</td>
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<tr>
<td><strong>Twitter Views</strong></td>
<td>The Twitter views metric represents the total number of times an email shared via a Twitter social sharing link was viewed.</td>
<td>The Twitter views metric is important because it allows you to see how effective the email you sent is after it has been shared via Twitter. This metric can give you insight into the effectiveness of using the Twitter social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.</td>
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<tr>
<td><strong>LinkedIn Views</strong></td>
<td>The LinkedIn views metric represents the total number of times an email shared via a LinkedIn social sharing link was viewed.</td>
<td>The LinkedIn views metric is important because it allows you to see how effective the email you sent is after it has been shared via LinkedIn. This metric can give you insight into the effectiveness of using the LinkedIn social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.</td>
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<td><strong>Digg Views</strong></td>
<td>The Digg views metric represents the total number of times an email shared via a Digg social sharing link was viewed.</td>
<td>The Digg views metric is important because it allows you to see how effective the email you sent is after it has been shared via Digg. This metric can give you insight into the effectiveness of using the Digg social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.</td>
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<tr>
<td>MySpace Views</td>
<td>The MySpace views metric represents the total number of times an email shared via a MySpace social sharing link was viewed.</td>
<td>The MySpace views metric is important because it allows you to see how effective the email you sent is after it has been shared via MySpace. This metric can give you insight into the effectiveness of using the MySpace social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.</td>
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<td></td>
<td><strong>Note:</strong> MySpace views will be counted for anyone that views the email shared via the MySpace social sharing link, not just contacts in your account.</td>
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<td></td>
<td><strong>Tip:</strong> For more information on social sharing links, see Social Share Links in Emails on page 116.</td>
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<tr>
<td>Likes (Facebook)</td>
<td>The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.</td>
<td>The Facebook likes metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. Generally speaking, it is a positive thing if someone takes the time to like your Facebook post.</td>
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<td><strong>Note:</strong> Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.</td>
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<tr>
<td>Forwards To A Friend</td>
<td>The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link.</td>
<td>The forwards to a friend metric is important because it highlights both contact engagement, and the effectiveness of the email you sent. If a contact makes the effort to use the forward to a friend link, most of the time it means they found the email you sent them compelling enough to forward it to a friend.</td>
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<td><strong>Tip:</strong> For more information on adding a forward to a friend link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on forward to a friend webforms, see Types of Webforms on page 204.</td>
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</table>
| **Contact Updates (email)** | The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.  
**Tip:** For more information on adding a manage preferences link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on manage preferences webforms, see Types of Webforms on page 204. | The contact updates metric is important because it allows you to see how many contacts updated their information via a manage preferences link contained in an email you sent them. If you notice that the contact updates number is high, you should dig a little deeper and find out what contacts are doing once they get to the manage preferences page. Depending on the actions they are taking on the manage preferences page, you may need to re-work the content of the email, or re-evaluate the list or segment you are sending to. |
| **Undeliverable (email)** | The email undeliverable metric represents the number of sent emails that were not delivered.                                                                                                                                                                                                 | The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.                                                                                                                                                                                                                     |
| **Hard Bounce (email)** | Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.  
**Tip:** For more information on the bounce classification system, see Email Bounce on page 196. | The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.                                                                                               |
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<tr>
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<tr>
<td><strong>Bad Email Address</strong></td>
<td>The bad email address bounce type means that the email server in question has indicated that this is not a valid account. Whether the contact has left that host, had a typo in their registration, or simply made up the email address cannot be discerned from this message.</td>
<td>The bad email address metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of bad email address bounces, you need to review your contact gathering mechanisms. Are you forcing people to provide an email address? Contacts may just be making something up to get through the form. Or, perhaps the demographic you are appealing to is more likely to not want to give out their real email address. If so, you may want to tempt them to give a real address by telling them that you will send a coupon, more information, or a link they need to click to verify their account. It all really depends on how bad you want their email address. If you aren't going to validate addresses in some way, then you probably shouldn't require people to give you their email address.</td>
</tr>
<tr>
<td><strong>Destination System Unreachable</strong></td>
<td>The destination system unreachable hard bounce type means that there was a connection issue with the email server.</td>
<td>A destination system unreachable hard bounce is different than a bad email address hard bounce (which results in immediate removal of the contact in question). This bounce type means that we will not retry sending this specific email to this specific contact at this time because it is not likely to succeed. Later deliveries to the contact may succeed.</td>
</tr>
<tr>
<td><strong>Rejected Due To Message Content</strong></td>
<td>The rejected due to message content hard bounce type means that the email server has identified the email as spam.</td>
<td>We will not attempt to resend an email that results in a rejected due to message content hard bounce. If you see a number of these, then you should probably look at the message you are sending and take the time to run your message through a spam test. If you are still having problems or have questions about what may be causing this, please contact support.</td>
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<td>Metric</td>
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<td>Soft Bounce (email)</td>
<td>Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.</td>
<td>The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.</td>
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<td><strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
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<tr>
<td>Temporary Contact Issue</td>
<td>Temporary contact issue means that there was a temporary issue at the receiving mail server with respect to the contact in question. An example of this is a mailbox full message.</td>
<td>There isn't too much you can do about a temporary contact issue bounce. It may, however, be an early indicator that a user has abandoned this email address. If you want to be pro-active and try to stem these type of bounces from occurring, include the manage preferences link (using %manage_url%) within your emails, in addition to the unsubscribe link. This allows users to easily update their email address.</td>
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<td><strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
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<tr>
<td>Destination System Temporarily Unreachable</td>
<td>Destination system temporarily unreachable soft bounce type means that there was a temporary issue at the receiving mail server, such as a server busy message.</td>
<td>A destination system temporarily unreachable bounce may be resolved via retries. If it is not, there is little you can do about this.</td>
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<td><strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
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<tr>
<td>Deferred Due To Message Content</td>
<td>Deferred due to message content is quite similar to the rejected message content bounce. Emails aren't often identified this way, as ISPs don't want you to resend something they identify as spam.</td>
<td>If you are seeing a majority of your emails being classified as deferred due to message content bounces, you should check your message and see if you can reduce its likelihood of being identified as spam.</td>
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<td><strong>Tip:</strong> For more information on the bounce classification system, see Email Bounce on page 196.</td>
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<tr>
<td>Unclassified</td>
<td>The unclassified metric represents the number of bounces that could not be classified using our bounce classification system. We try our best to classify bounces and keep from showing them as unclassified so that you can better understand why bounces are occurring.</td>
<td>We developed our bounce classification system in such a way that the most common types of bounces would always be classified. If you are noticing a high number of unclassified bounces, then something outside of normal circumstances is likely occurring. In this case, you should contact support for assistance in diagnosing the problem.</td>
</tr>
</tbody>
</table>
| Skipped                     | The skipped metric represents the total number of emails that were skipped and not sent to.                                        | The skipped metric is important because it lets you know how many emails were not sent. Note: For more detailed information on why a delivery was skipped, see the following metrics:  
  • Onboarding (Skipped) Metric on page 881  
  • Frequency Cap (Skipped) Metric on page 871 |
<p>| Email Frequency Cap (Skipped)| The frequency cap (skipped) metric represents the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account. | There are several reasons why you might see a high number of emails skipped for exceeding your frequency cap settings. You could simply be scheduling too many deliveries to your contacts, or you might have an automated message rule that is sending too much. Skipped deliveries represent missed conversion opportunities, so you'll want to review your sending process to try and prevent skipped deliveries from occurring. Tip: For more information on the email frequency cap settings, see Set Email Frequency Caps For Your Account on page 1330. |</p>
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<td>Email Onboarding (Skipped)</td>
<td>The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time. If you are continually seeing a high number of contacts skipped due to onboarding, it could mean you are trying to import a bad list. If you are importing a healthy list, contacts should very quickly move from onboarding to active. So, if you are continually seeing high numbers under onboarding (Skipped), you should re-examine the contacts you are importing or adding. <strong>Tip:</strong> For more information on the automated onboarding process, see Automated Onboarding on page 1081.</td>
<td>The onboarding (skipped) metric is important for two reasons. First, it lets you know about any contacts that could not be sent to. Second, it gives you an indication of how the contacts you are importing are affecting your account.</td>
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<tr>
<td>Contact Loss (email)</td>
<td>The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see Contact Status on page 1083</td>
<td>The contact loss metric is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under contact loss, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
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<tr>
<td>Email Unsubscribes (From Unsubscribes)</td>
<td>The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform. <strong>Tip:</strong> For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.</td>
<td>The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.</td>
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<tr>
<td>From Complaint (email)</td>
<td>The <em>Complaint (From Complaint)</em> metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.</td>
<td>The <em>Complaint (From Complaint)</em> metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP or via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application.</td>
</tr>
<tr>
<td>From Complaints- ISP Feedback</td>
<td>The <em>From Complaint - ISP Feedback</em> metric represents the number of contacts that were lost (made inactive) by complaining via an ISP feedback loop. <strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see <em>Sender and Delivery Rating</em> on page 309. <strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see <em>Tips For Fixing A Low Email Sender/Delivery Rating</em> on page 311.</td>
<td>The <em>From Complaint - ISP Feedback</em> metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP. They can do this by clicking the <em>Report Spam</em> button (or similarly named button) after receiving an email from you.</td>
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<tr>
<td><strong>From Complaint - Bronto Feedback</strong></td>
<td>The From Complaint - Bronto Feedback metric represents the number of contacts that were lost (made inactive) by complaining via the application. A contact can complain using a Complaint webform.</td>
<td>The From Complaint - Bronto Feedback metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain the Complaint webform. They can do this by clicking the link to a Complaint webform in an email they receive from you.</td>
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<tr>
<td><strong>Warning:</strong> A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see Sender and Delivery Rating on page 309.</td>
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<td><strong>Tip:</strong> For more information on fixing a low sender or delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.</td>
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<tr>
<td><strong>Tip:</strong> For more information on Complaint webforms, see Types of Webforms on page 204.</td>
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<tr>
<td><strong>Inactive Due To Bounces (email)</strong></td>
<td>The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. The bounce limit represents the number of times emails sent to a particular contact can consecutively bounce before the contact is made inactive. Once a contact is made inactive, you can no longer send to them until they once again opt-in to receiving marketing emails from you.</td>
<td>The inactive due to bounces metric is important because it better clarifies why you are losing contacts. If you notice a high number under inactive due to bounces, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
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<td><strong>Tip:</strong> For more information on bounces, see Email Bounce on page 196 in help.</td>
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<td><strong>Tip:</strong> For more information on setting the bounce limit in your account, see Set A Bounce Limit For Your Account on page 1330.</td>
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</table>

**Related Topics**

Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

**Email Bounce** on page 196
An email bounce is an automated message about a delivery failure.

**Social Share Links in Emails** on page 116

## Detailed Contact Activity Report Metrics
Detailed contact activity reports allow you to download a report containing contact level metrics for a report.

When selecting to download a detailed contact activity report, you can choose to include all the available metrics, or specific metrics. Each of the metrics that can be selected for a detailed contact activity report are described below.

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<thead>
<tr>
<th>Metric</th>
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<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
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<td><strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
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<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: <strong>Accepted</strong></td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Undeliverable (email)</strong></td>
<td>The email undeliverable metric represents the number of sent emails that were not delivered.</td>
<td>The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <strong>Unique Renders</strong></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <em>Configure Order Settings</em> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Forwards To A Friend</strong></td>
<td>The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link.</td>
<td>The forwards to a friend metric is important because it highlights both contact engagement, and the effectiveness of the email you sent. If a contact makes the effort to use the forward to a friend link, most of the time it means they found the email you sent them compelling enough to forward it to a friend.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on adding a forward to a friend link to your message, see <a href="#">Insert A Link To A Webform Using The WYSIWYG Editor</a> on page 114. For more information on forward to a friend webforms, see <a href="#">Types of Webforms</a> on page 204.</td>
<td></td>
</tr>
<tr>
<td><strong>Contact Updates (email)</strong></td>
<td>The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.</td>
<td>The contact updates metric is important because it allows you to see how many contacts updated their information via a manage preferences link contained in an email you sent them. If you notice that the contact updates number is high, you should dig a little deeper and find out what contacts are doing once they get to the manage preferences page. Depending on the actions they are taking on the manage preferences page, you may need to re-work the content of the email, or re-evaluate the list or segment you are sending to.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on adding a manage preferences link to your message, see <a href="#">Insert A Link To A Webform Using The WYSIWYG Editor</a> on page 114. For more information on manage preferences webforms, see <a href="#">Types of Webforms</a> on page 204.</td>
<td></td>
</tr>
<tr>
<td><strong>Email Unsubscribes (From Unsubscribes)</strong></td>
<td>The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.</td>
<td>The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on the webforms a contact can use to unsubscribe, see <a href="#">Types of Webforms</a> on page 204.</td>
<td></td>
</tr>
</tbody>
</table>
### Consent Report Download Metrics

A consent report lets you download consent records for your contacts.

Consent reports contain metrics for the time that a contact opted in or out of receiving communication.

**Table 2: Consent Report Metrics**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Id</td>
<td>The unique identifier for a contact in Bronto formatted as a UUID.</td>
</tr>
<tr>
<td>Email address</td>
<td>The email address stored for the contact.</td>
</tr>
<tr>
<td>Log action time</td>
<td>The date and time that the action being recorded took place.</td>
</tr>
<tr>
<td>User specified?</td>
<td>A boolean (TRUE/FALSE) field indicating whether the contact opted in or out on their own.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>IP address</td>
<td>The IP address that is associated with a consent change.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the contact: OPT_IN or OPT_OUT.</td>
</tr>
<tr>
<td>Source</td>
<td><strong>Origin</strong></td>
</tr>
<tr>
<td>Webform</td>
<td>WEBFORM</td>
</tr>
<tr>
<td>API / Data Loader / Connectors</td>
<td>API</td>
</tr>
<tr>
<td>Bulk Import via the UI / Direct Import</td>
<td>IMPORT</td>
</tr>
<tr>
<td>Pop-Up Manager / Direct Add</td>
<td>DIRECT_ADD</td>
</tr>
<tr>
<td>Direct Unsubscribe</td>
<td>DIRECT_UNSUB</td>
</tr>
<tr>
<td>Workflow</td>
<td>WORKFLOW</td>
</tr>
<tr>
<td>Action in the application</td>
<td>SUPPRESSION</td>
</tr>
<tr>
<td>Deletion caused by the suppression list</td>
<td>COMPLAINT</td>
</tr>
<tr>
<td>Email bounce</td>
<td>BOUNCE</td>
</tr>
<tr>
<td>Email reply requesting unsubscribe</td>
<td>COMPLAINT</td>
</tr>
<tr>
<td>Complaint via email</td>
<td>COMPLAINT</td>
</tr>
<tr>
<td>Source details</td>
<td><strong>Origin</strong></td>
</tr>
<tr>
<td>Webform</td>
<td>External webform ID</td>
</tr>
<tr>
<td>API / Data Loader / Connectors</td>
<td>API method called</td>
</tr>
<tr>
<td>Bulk Import via the UI / Direct Import</td>
<td>Logged in user</td>
</tr>
<tr>
<td>Pop-Up Manager / Direct Add</td>
<td>No default. Can be set during Direct Add.</td>
</tr>
<tr>
<td>Direct Unsubscribe</td>
<td>No default. Can be set during Direct Unsubscribe.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Workflow ID if change initiated by workflow</td>
</tr>
<tr>
<td>Action in the application</td>
<td>Logged in user that performed action</td>
</tr>
<tr>
<td>Deletion caused by the suppression list</td>
<td>&quot;Domain suppressed&quot; or &quot;Email address suppressed&quot;</td>
</tr>
<tr>
<td>Email bounce</td>
<td>Bounce details from MTA</td>
</tr>
</tbody>
</table>
Generate Reports Based On Contact Statuses

Special Reports are designed to help you better manage your contacts by allowing you to generate reports based on the status of your contacts.

**Note:** All reports will download into a CSV file that you can open in Microsoft Excel.

**Tip:** You can directly import an export report back into the application without having to make any modifications to the export report. For more information on importing a .CSV file, see Contact Imports on page 1080.

To begin exporting contact data:

1. Go to Reports > Contact Export & Reports.
2. Optional: In the Add A Name For The Report section, add a name for the report in the Report Name text box.
3. In the Choose A Status section, select the types of contacts you want to include in the report. You can select:
   - All
   - **Active** - Contacts with a status of Active are contacts that can receive emails from you.
   - **Bounce** - Contacts with a status of Bounce cannot be sent emails because they have hard bounced due to a bad email address, or they have exceeded the bounce limit set for your account.
     **Tip:** For more information on bounced messages, see Email Bounce on page 196.
   - **Unconfirmed** - Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you in order for you to send to them. One way to move Unconfirmed contacts to Active status is to send them an email that includes a Subscription Confirmation webform which will allow them to .
   - **Onboarding** - Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.
     **Tip:** For more information on automated onboarding, see Automated Onboarding on page 1081.
   - **Unsubscribed** - Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.
   - **Unsubscribed by Complaint** - Contacts who were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.
     **Tip:** For more information on the contact statuses, see Difference Between Active And Inactive Contacts.
4. Optional: Click the Only include contacts whose status matched the selected status in a particular date range checkbox to limit the report to only contain contacts whose status matched the selected status within the specified date range.
   **Note:** The date range limits the report to contacts who had a particular status within the selected date range. It does not limit the data included in the report for those contacts. See the Choose Data To Be Included In The Report section to view the default and optional data included for contacts contained in the report.
5. If you clicked the
   - Only include contacts whose status matched the selected status in a particular date range: checkbox, select a starting date for the report using the Starting Date date picker.
   - Only include contacts whose status matched the selected status in a particular date range: checkbox), select an ending date for the report using the Ending Date date picker.
6. In the Choose A Report Type section, select the type of report you want to create. You can select:
• Include all contacts whose status matched the selected status during the selected date range.
• (Only available when using a date range) Only include contacts whose status matched the selected status and also updated their field data, list membership settings, or subscription settings during the specified date range.

Note: A contact can update their field data, list membership settings, or subscription settings using a Subscription Confirmation webform, a Manage Preferences webform, an Unsubscribe webform, or a Complaint webform. For more information on using webforms, see Webforms.

By default, the report will contain the following data for contacts included in the report:

### Table 3: Included Contact Fields

<table>
<thead>
<tr>
<th>Contact Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>The email address stored for the contact. An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact. A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the contact. Tip: For more information on each type of contact status, see Contact Status on page 1083.</td>
</tr>
<tr>
<td>Date Created</td>
<td>The date the contact was created.</td>
</tr>
<tr>
<td>Last Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
</tr>
<tr>
<td>Contact Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Source</td>
<td>Indicates how the contact was added to your account. Contacts can be added via:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Manual addition (Bronto)</strong></td>
</tr>
<tr>
<td></td>
<td>If a contact source was provided when the contact was added, the contact source provided will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on manually creating contacts in the application, see Create An Individual Contact on page 1101.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Bulk import</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was imported as part of the import process in the application, the source provided on the first page of the import process will be shown here as well. For more information importing contacts into the application, see Contact Imports on page 1080.</td>
</tr>
<tr>
<td></td>
<td>If the contact was added via Direct Import, the value provided in the source parameter will be shown here as well. For more information on using Direct Import, see Direct Import on page 1115.</td>
</tr>
<tr>
<td></td>
<td>• <strong>API session</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was added via the API and a value for the customSource property was passed in, that value will be displayed. If the contact was added using the Data Loader, the text API session will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on adding contacts using the API, see the documentation on the updateDeliveries API call. For more information on using the Data Loader, see Data Loader.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Web page form sign-up (Name of the webform) (IP Address)</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was added via a webform, the name of the webform will be displayed, along with the IP address where the form was hosted.</td>
</tr>
<tr>
<td></td>
<td>Contacts added using Direct Add and Pop-up Manager will be displayed as web page form sign-ups. For more information on using Direct Add, see Direct Add on page 1102.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Salesforce import</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was imported as part of a Salesforce import, the contact source you provided on the first page of the Salesforce import process will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on importing contacts from Salesforce, see Import A Salesforce Report on page 1091.</td>
</tr>
<tr>
<td>Contact Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Source Detail/Custom Source</td>
<td>A source value for your contact that you define during a bulk import or the IP address of the contact when they submitted a webform.</td>
</tr>
<tr>
<td>Sent</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
</tr>
<tr>
<td>Opened</td>
<td>The total number of opens recorded for a contact.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
</tr>
<tr>
<td>Clicked</td>
<td>Clicked represents the unique clicks recorded for a contact. A unique click is recorded the first time a contact clicks any link contained in an email you send them.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO)</td>
</tr>
<tr>
<td>Conversions</td>
<td>Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The Total Revenue metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
</tr>
<tr>
<td>Message Type Preference</td>
<td>Indicates whether a contact prefers to receive messages as text or HTML.</td>
</tr>
<tr>
<td>On Lists</td>
<td>Includes a list of contacts that the contact is on.</td>
</tr>
<tr>
<td>On Keywords</td>
<td>The SMS keyword(s) that a contact is subscribed to.</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
</tr>
<tr>
<td>Contact Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Unsubscribe Date</td>
<td>The last time the contact unsubscribed from receiving marketing emails from you.</td>
</tr>
<tr>
<td>Twitter Handle</td>
<td>The Twitter handle for a contact.</td>
</tr>
<tr>
<td>Facebook Username</td>
<td>The Facebook username for a contact.</td>
</tr>
</tbody>
</table>

Additional data can be included in the report using the settings described below:

Note: The date range selected above limits the report to contacts who had a particular status within the selected date range. It does not limit the data included for those contacts that you select in the Choose Data To Be Included In The Report section.

7. Optional: In the Choose Fields section, select the field data you want included in the report.

8. Optional: In the Choose GeoIP / Technology Data section, select the GeoIP and technology usage data you want included in the report.

   For more information about GeoIP see Contact Details Location (GeoIP) Data on page 920. For more information about Technology Data see Contact Browser, Email Client, and OS Data on page 918.

9. Optional: In the Choose RFM Metrics section, select the RFM metrics you want included in the report.

   For more information about RFM metrics see Contact Details RFM Metrics on page 917.

10. Click Next.

11. Optional: In the Email me when my report is ready for download section, add an email address that will be notified when the report is ready for download.

   You will also be notified when the report is ready for download via an in application notification.

12. Click Generate to begin generating the report.

Related Topics

Email Bounce on page 196
An email bounce is an automated message about a delivery failure.

Types of Webforms on page 204
Descriptions of the available types of webforms.

Related Topics

Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Email Bounce on page 196
An email bounce is an automated message about a delivery failure.

Automated Onboarding on page 1081
Automated onboarding is a simple process that allows you to quickly add contacts to your account, while mitigating the risk of these contacts negatively affecting sending in your account.

Filter A Report By Date Range

You can filter reports to view metrics within a specific date range. For example, you can filter deliveries to only view deliveries made within the last week, month, or year. You have the option to select from predefined date ranges, or set a custom date range.

When you filter a report by a date range, report metrics in gray bars and graphs may vary from the metrics in report grids because these datasets are collected differently. Metrics provided in bars and graphs are based on the event date. Metrics provided in report grids, like the grid on the Clicks tab, are based on the delivery date.

To filter a report by date range:

1. Navigate to a report.
2. Click the **calendar icon**.

   The calendar icon is to the right of the last report section tab.

   ![Calendar Icon](image)

3. Select a date filter from the list of available filters by clicking on it.

   If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.

4. To use a custom date range, click **Custom** and add a start and an end date in the date boxes.

   ![Custom Date Range](image)

5. To remove the filter, click the calendar icon and then click on **All Time**.

### Add Contacts From A Report To A List

For any message, delivery, SMS, workflow, automated message rule, delivery group, or A/B split report, you can add the contacts described in the report to a list. For example, if you were looking at a delivery report with 1000 clicks, you could add all of the contacts who recorded a click for the delivery to a list of your choosing.

To add contacts from a report to a list:

1. Go to a report for a message, delivery, workflow, automated message rule, delivery group, or A/B split report.
2. Click **Add Contacts To List**.
3. Choose a metric that describes which contacts you want to add to a list using the **Contact Filter** pull-down menu.

   You can choose to add contacts who were:

   - Sent
   - Delivered
   - Bounced
   - Opened
   - Did Not Open
   - Clicked
   - Did Not Click
   - Converted
   - Responded to a form
   - Did Not Respond
   - Forwarded to a friend
Report Metrics

This section of documentation lists each individual report metric in Bronto with granular details about every metric. Each metric includes an explanation of why the metric is important and how it is calculated.

Application Complaints Metric

The Application Complaint metric represents the total number of contacts that were lost (made inactive) by complaining via the application.

What Does The Application Complaint Metric Represent?

The application complaints metric represents the number of contacts that were lost (made inactive) by complaining via the application through a webform.

⚠️ Warning: A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see Sender and Delivery Rating on page 309.

⚠️ Tip: For more information on fixing a low sender or delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.

⚠️ Tip: For more information on Complaint webforms, see Types of Webforms on page 204.

Why Is The Application Complaint Metric Important?

The Application Complaints metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain the Complaint webform. They can do this by clicking the link to a Complaint webform in an email they receive from you.

How Is The Application Complaint Metric Calculated?

Total Complaints - ISP Complaints = Application Complaints

Average List/Segment Click Rate Metric

The average click rate represents an average of the individual click rates for each delivery sent to the list or segment.

What Does The Average List/Segment Click Rate Metric Represent?

The average click rate represents an average of the individual click rates for each delivery sent to the list or segment.
Why Is The Average List/Segment Click Rate Metric Important?

The average click rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. The average click rate gives you an indication of how effective the emails you sent to the list or segment were at getting the contacts who opened the emails to click the links contained therein.

How Is The Average List/Segment Click Rate Metric Calculated?

(\text{The sum of the Clicks counts for each delivery sent to the list or segment} / \text{The sum of the Opens counts for each delivery sent to the list or segment} \times 100 = \text{Average List/Segment Click Rate})

Average Clicks Metric

The average clicks metric represents the average number of times a link was clicked in an email.

What Does The Average Clicks Metric Represent?

The average clicks metric represents the average number of times a link was clicked in an email. For example, if your email has 20 total clicks and 5 links, then the average clicks would be 4.

\textbf{Tip:} Remember, the clicks and total clicks metrics are not the same. For more information on what each metric is and how it is calculated, see \textit{Clicks Metric} on page 859 and \textit{Total Clicks Metric} on page 889.

Why Is The Average Clicks Metric Important?

The average clicks metric is important because it can represent a high level of average interaction with your email. It can also signify that the content is effective at engaging your contacts.

\textbf{Note:} While average clicks can give you a sense of the relative effectiveness of your email content, it can be skewed if there is a big difference in the total clicks and clicks. If you notice a high total clicks number and a significantly lower clicks number, it could mean the links in your email are confusing or not working as the user expects them to.

\textbf{Tip:} To determine how effective the average clicks number really is, look deeper into the report and view the average clicks metric in comparison to conversions. If your average clicks number is really high and you still aren't seeing many conversions, then something might be wrong with your content, particularly the call to action.

How Is The Average Clicks Metric Calculated?

Total Clicks \div Clicks = \text{Average Clicks}

Average List/Segment Conversion Rate Metric

The average conversion rate represents an average of the conversion rates for each delivery sent to the list or segment.

What Does The Average List/Segment Conversion Rate Metric Represent?

The average conversion rate represents an average of the conversion rates for each delivery sent to the list or segment.

Why Is The Average List/Segment Conversion Rate Metric Important?

The average click rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. Whether it's making a purchase or downloading a whitepaper, the ultimate goal of email marketing is to compel your contacts to perform an action.

How Is The Average List/Segment Conversion Rate Metric Calculated?

(\text{The sum of the Conversions counts for each delivery sent to the list or segment} / \text{The sum of the Clicks counts for each delivery sent to the list or segment} \times 100 = \text{Average List/Segment Conversion Rate})
Average List/Segment Delivery Rate Metric
The average delivery rate represents an average of the individual delivery rates for each delivery sent to a list or segment.

What Does The Average List/Segment Delivery Rate Metric Represent?
The average delivery rate represents an average of the individual delivery rates for each delivery sent to a list or segment.

Tip: For more information on the delivery rating for a delivery, see Sender and Delivery Rating on page 309.

Why Is The Average List/Segment Delivery Rate Metric Important?
The average delivery rate is important because it gives you an indication on the relative health of the list or segment. If the average delivery rate is low, then contacts on the list or segment are not receiving emails you send them.

How Is The Average List/Segment Delivery Rate Metric Calculated?
(The sum of the Delivered counts for each delivery sent to the list or segment / The sum of the Sent counts for each delivery sent to the list or segment) * 100 = Average List/Segment Delivery Rate

Average List/Segment Open Rate Metric
The average open rate represents an average of the individual open rates for each delivery sent to a list or segment.

What Does The Average List/Segment Open Rate Metric Represent?
The average open rate represents an average of the individual open rates for each delivery sent to a list or segment.

Why Is The Average List/Segment Open Rate Metric Important?
The average open rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. The average open rate lets you see out of all the contacts on the list or segment who received the email you sent, who actually took the time to open it.

How Is The Average List/Segment Open Rate Metric Calculated?
(The sum of the Opens counts for each delivery sent to the list or segment / The sum of the Delivered counts for each delivery sent to the list or segment) * 100 = Average List/Segment Open Rate

Average Opens Metric
The average opens metric represents the average number of times an email was opened.

What Does The Average Opens Metric Represent?
The average opens metric represents the average number of times emails you sent were opened. For example, if 20 total opens and 5 emails are recorded, then the average opens would be 4.

Note: Total opens and opens are not the same metric. For more information on what each metric means, see Total Opens Metric on page 890 and Opens Metric on page 882.

Why Is The Average Metric Important?
The average opens metric is important because it represents an initial level of average interaction with emails you send. It can also signify that the subject line is effective and the from name is trusted.

Note: While average opens can give you a sense of the relative effectiveness of your subject line and from name, it can be skewed if there is a big difference in the total opens and opens. If you notice a high total
If your opens number and a significantly lower opens number, then your email probably isn't getting opened by as many individual contacts as it could be.

Tip: To determine how effective the average opens number really is, look deeper into the report and view the average opens metric in comparison to clicks. If your average opens number is really high and you still aren't seeing many clicks, then something might be wrong with the content of the email.

How Is The Average Opens Metric Calculated?
Total Opens / Opens = Average Opens

Average Order Value (AOV) Metric
The average order value is a comparison of the number of orders to the total revenue.

What Does The Average Order Value Metric Represent?
The average order value is a comparison of the number of orders to the total revenue. If you have a total revenue of $100 and 5 different orders, your average order value is $20.

Why Is The Average Order Value Metric Important?
This is important because it provides insight into how much contacts are spending, on average, each time an order is placed.

Tip: Conversions and Orders are not the same metric. For information on what each metric means and how it's calculated, see Conversions Metric on page 865 and Total Orders Metric on page 891.

How Is The Average Order Value Metric Calculated?
Total Order Revenue / Number of Orders = Average Order Value

Bad Email Address Metric
The bad email address metric represents the number of sent messages that were not delivered due to bad email address bounces.

What Does The Bad Email Address Metric Represent?
The bad email address bounce type means that the email server in question has indicated that this is not a valid account. Whether the contact has left that host, had a typo in their registration, or simply made up the email address cannot be discerned from this message.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Why Is The Bad Email Address Metric Important?
The bad email address metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of bad email address bounces, you need to review your contact gathering mechanisms. Are you forcing people to provide an email address? Contacts may just be making something up to get through the form. Or, perhaps the demographic you are appealing to is more likely to not want to give out their real email address. If so, you may want to tempt them to give a real address by telling them that you will send a coupon, more information, or a link they need to click to verify their account. It all really depends on how bad you want their email address. If you aren't going to validate addresses in some way, then you probably shouldn't require people to give you their email address.

Tip: For more information on hard bounces, see Email Bounce on page 196.

How Is The Bad Email Address Metric Calculated?
The Bad Email Address metric is a total of the bounces that were classified as bounces due to a bad email address.
Bounce Rate Metric
The bounce rate metric represents the percentage of bounces that occurred.

What Does The Bounce Rate Metric Represent?
The bounce rate indicates the percentage of bounces (as compared to the number delivered) recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Why Is The Bounce Rate Metric Important?
The bounce rate metric is important because it gives you an idea of how your message is performing from a deliverability perspective. If the bounce rate is high, your sender/delivery rating will be negatively affected and contacts may not be receiving your message. The bounce rate rolls up all the types of bounces into one percentage. To determine what type of bounce occurred, you can view the following metrics which further classify and explain bounces:

- Soft Bounce Metric on page 888
  - Temporary Contact Issue Metric on page 889
  - Destination System Temporarily Unreachable Metric on page 868
  - Deferred Due To Message Content Metric on page 865
- Hard Bounce Metric on page 876
  - Bad Email Address Metric on page 857
  - Destination System Unreachable Metric on page 867
  - Rejected Due To Message Content Metric on page 885

Tip: For more information on bounces and how we classify them, see Email Bounce on page 196.

How Is The Bounce Rate Metric Calculated?
(Bounces/Sent) * 100 = Bounce Rate

Click Rate Metric
The click rate represents the number of clicks that were recorded, as compared to the number of opens recorded.

What Does The Click Rate Metric Represent?
The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.

Why Is The Click Rate Metric Important?
The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.

Tip: You can create segments based on the click rate stored for contacts in your account. For more information on how to create segments based contact click rates, see Create A Segment Based On Contact Email Click Rates on page 484.
How Is The Click Rate Metric Calculated?

(Clicks/Opens) * 100 = Click Rate

Note: Opens are representative of unique opens and clicks are representative of unique clicks.

Click Through Rate Metric

The click through rate represents the number of clicks that were recorded, as compared to the delivered number.

What Does The Click Through Rate Metric Represent?

The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.

Why Is The Click Through Rate Metric Important?

The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.

Tip: The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858.

How Is The Click Through Rate Metric Calculated?

(Clicks/Delivered) * 100 = Click Through Rate

Note: Clicks are representative of unique clicks.

Clicks Metric

The clicks metric represents the unique clicks per contact.

What Does The Clicks Metric Represent?

The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through

Note: The clicks metric is not the same as the total clicks metric. For more information on the total clicks metric and how it is calculated, see Total Clicks Metric on page 889 in help.

Why Is The Clicks Metric Important?

The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.

Tip: If you notice a high number of opens and a low number of clicks, then chances are issues with your email's content that is keeping contacts from doing anything beyond just opening the email.

How Is The Clicks Metric Calculated?

The clicks metric is a total of all the unique clicks recorded.

Clicks (Facebook) Metric

The Facebook clicks metric represents the total clicks recorded for a Facebook message or individual post.
What Does The Clicks (Facebook) Metric Represent?
The Facebook clicks metric represents the total clicks recorded for a Facebook message or post.

Note: In order to track clicks for a Facebook message, you need to have enable URL shortening and tracking. For instructions on how to do this, see Create A Facebook Message on page 251.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Why Is The Clicks (Facebook) Metric Important?
The Facebook clicks metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook clicks, you can tell that Facebook users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.

How Is The Facebook Clicks Metric Calculated?
The Facebook clicks metric is a total of all the clicks for a particular Facebook message or post.

Clicks (Twitter) Metric
The Twitter clicks metric represents the total clicks recorded for a Twitter message or individual post.

What Does The Clicks (Twitter) Metric Represent?
The Twitter clicks metric represents the total clicks recorded for a Twitter message or post. A click is recorded for a Twitter message or post when a Twitter user clicks a link contained in one of your Twitter posts.

Note: In order to track clicks for a Twitter message, you need to have enable URL shortening and tracking. For instructions on how to do this, see Create Twitter on page 250.

Why Is The Clicks (Twitter) Metric Important?
The Twitter clicks metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter clicks, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.

How Is The Twitter Clicks Metric Calculated?
The Twitter clicks metric is a total of all the clicks for a particular Twitter message or post.

Clicks Per Link Metric
The clicks per link metric represents the unique clicks per link for a particular message, delivery, A/B split test, automated message rule, or delivery group.

What Does The Clicks Per Link Metric Represent?
The clicks per link metric is a link centric metric that represents the clicks (unique clicks) recorded for a link contained in a particular message, delivery, A/B split test, automated message rule, or delivery group. This metric can be viewed in the table at the bottom of detailed click reports for a message, delivery, automated message rule, A/B split test, or delivery group. A click per link is recorded the first time a link is clicked. If a link is clicked 9 times, 1 click per link will be recorded for that link. If 5 different links are each clicked 10 times, then 1 click will be recorded for each of the 5 links.

Note: The clicks per link metric and the total clicks per link metric are not the same metric. For more information on the total clicks per link metric, see Total Clicks Per Link Metric on page 890.
**Why Is The Clicks Per Link Metric Important?**

The clicks per link metric is important because it can provide some clarification to both the total clicks metric and the total clicks per link metric. For example, let's say for some reason a contact clicks a link 100 times. Those 100 clicks will show up in the total clicks metric, as well as the total clicks per link metric for that link. Be careful, however, as this may be a bit misleading. Let's say this was the only contact who clicked on this link. Sure there are a 100 total clicks and 100 total clicks per link, but it's all from the same contact! If you were to look at the clicks per link for the link, you would be able to spot this because the clicks per link would show only 1.

**How Is The Clicks Per Link Metric Calculated?**

The clicks per link metric is a total of all the unique clicks for a particular link.

**Click Rate (SMS) Metric**

The Click Rate (SMS) metric represents the percentage of clicks that were recorded for an SMS message.

**What Does The Click Rate (SMS) Metric Represent?**

The Click Rate (SMS) metric represents the percentage of clicks that were recorded for an SMS message. The Click Rate (SMS) metric gives you an indication of how effective the SMS you sent was at getting contacts to click the links contained therein.

**How Is The Click Rate (SMS) Metric Calculated?**

\[
\text{SMS Click Rate} = \left( \frac{\text{SMS Clicks}}{\text{SMS Total Sent}} \right) \times 100
\]

**Comments (Facebook) Metric**

The Facebook comments metric represents the total comments recorded for a Facebook message or individual post.

**What Does The Comments (Facebook) Metric Represent?**

The Facebook comments metric represents the total number of comments recorded for a Facebook message or post.

**Why Is The Comments (Facebook) Metric Important?**

The Facebook comments metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook comments, you can tell that Facebook users were engaged enough in the content of your post to respond in the form of a comment.

**How Is The Facebook Comments Metric Calculated?**

The Facebook comments metric is a total of all the comments made on a particular Facebook message or post.

**Complaint Rate Metric**

The Complaint Rate represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or that complained via the application.

**What Does The From Complaint Rate Represent?**

The Complaint Rate metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.
Why Is The From Complaint Rate Important?

The *Complaint Rate* is important because it better clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application. They can do this by clicking the *Report Spam* button (or similarly named button) after receiving an email from you.

**Warning:** A high number of complaints will negatively impact your sender and delivery rating. For information on the sender and delivery ratings, see *Sender and Delivery Rating* on page 309.

**Tip:** For more information on fixing a low sender or delivery rating, see *Tips For Fixing A Low Email Sender/Delivery Rating* on page 311.

### How Is The Complaint Rate Calculated?

\[
\text{(Complaints/Sent)} \times 100 = \text{Complaint Rate}
\]

**Note:** The *Complaints* metric is comprised of complaints from ISP feedback loops, and complaints made via the application. For more information on these metrics and how they are calculated, see *From Complaint Metric* on page 872, *Complaints From ISP Feedback Loops Report* on page 819 and *From Complaint - Bronto Feedback Metric* on page 873.

**Note:** A big part of CAN-SPAM compliance is honoring complaints and subsequent unsubscribe request in a timely fashion. For more information on CAN-SPAM compliance, see *CAN-SPAM Act* on page 200.

Contact Loss Metric

The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive messages from you as a result of the message or delivery.

### What Does The Contact Loss Metric Represent?

The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see *Contact Status* on page 1083

### Why Is The Contact Loss Metric Important?

The contact loss metric is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under contact loss, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.

**Tip:** For more specific information on why contacts are being lost, you can drill down to the metrics that describe how contacts are being lost. For more information on these metrics and how they are calculated, see *From Complaint Metric* on page 872, *Unsubscribes Metric* on page 895, and *Inactive Due To Bounces Metric* on page 877.

### How Is The Contact Loss Metric Calculated?

\[
\text{From Unsubscribes + From Complaints + Inactive Due To Bounces} = \text{Contact Loss}
\]

Contact Loss Rate Metric

The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive messages from you as a result of the message or delivery.

### What Does The Contact Loss Rate Represent?

The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.
**Why Is The Contact Loss Rate Important?**

The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.

**Tip:** For more specific information on why contacts are being lost, you can drill down to the metrics that describe how contacts are being lost. For more information on these metrics and how they are calculated, see [From Complaint Metric](#) on page 872, [Unsubscribes Metric](#) on page 895, and [Inactive Due To Bounces Metric](#) on page 877.

**How Is The Contact Loss Rate Calculated?**

\[
\text{Contact Loss Rate} = \left( \frac{\text{Contact Loss}}{\text{Sent}} \right) \times 100
\]

**Tip:** The Contact Loss metric is a total of all the metrics that describe how the contact was lost. For more information on the contact loss metric and how it is calculated, see [Contact Loss Metric](#) on page 862.

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**Contact Updates Metric**

The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.

**What Does The Contact Updates Metric Represent?**

The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.

**Tip:** For more information on adding a manage preferences link to your message, see [Insert A Link To A Webform Using The WYSIWYG Editor](#) on page 114. For more information on manage preferences webforms, see [Types of Webforms](#) on page 204.

**Why Is The Contact Updates Metric Important?**

The contact updates metric is important because it allows you to see how many contacts updated their information via a manage preferences link contained in an email you sent them. If you notice that the contact updates number is high, you should dig a little deeper and find out what contacts are doing once they get to the manage preferences page. Depending on the actions they are taking on the manage preferences page, you may need to re-work the content of the email, or re-evaluate the list or segment you are sending to.

**Tip:** For more information on manage preferences pages, see [Types of Webforms](#) on page 204.

**How Is The Contact Updates Metric Calculated?**

\[
\text{Contact Updates percentage} = \left( \frac{\text{Contact Updates}}{\text{Opens}} \right) \times 100
\]

**Tip:** The opens metric is representative of unique opens, which is different from the total opens metric. For more information on what these metrics are and how they are calculated, see [Opens Metric](#) on page 882 and [Total Opens Metric](#) on page 890.

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**Contacts Who Shared Metric**

The contacts who shared metric represents the number of contacts used social sharing links.

**What Does The Contacts Who Shared Metric Represent?**

The contacts who shared metric represents the number of contacts who used the social sharing links contained in the email. For example,
• Contact A clicks the Facebook sharing link
• Contact B clicks the Twitter and LinkedIn sharing links
• Contact C clicks the Facebook and Twitter sharing links

Then 3 is recorded for the Contacts Who Shared metric.

Note: Forward to a friend URLs are not included in the total social shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The Contacts Who Shared Metric Important?
The contacts who shared metric is important because it allows you to see how many contacts used at least 1 of the social sharing links contained in an email message you sent them.

How Is The Contacts Who Shared Metric Calculated?
The contacts who shared metric is a total of the number of times contacts used social sharing links.

Conversion/Delivered Rate Metric
The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.

What Does The Conversion/Delivered Rate Metric Represent?
The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.

Why Is The Conversion/Delivered Rate Metric Important?
The conversion/delivered rate is important because it gives you an overall indication of the contacts who received your message and were also engaged enough to convert. Whether it's making a purchase or downloading a whitepaper, the ultimate goal of email marketing is to compel your contacts to perform an action.

Tip: The conversion/delivered rate is a legacy calculation. For a more useful calculation, we suggest you view the conversion rate. The conversion rate is determined by the number of conversions over the number of clicks. For more information on the conversion rate, see Conversion Rate Metric on page 864.

How Is The Conversion/Delivered Rate Metric Calculated?
Conversions/Delivered = Conversion Delivered Rate

Conversion Rate Metric
The conversion rate represents the percentage of times a conversion was made, as compared to the number of clicks recorded.

What Does The Conversion Rate Metric Represent?
The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.
Why Is The Conversion Rate Metric Important?

The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.

Tip: You can create segments based on the conversion rate stored for contacts in your account. For more information on how to create segments based on conversion rates recorded for your contacts, see Create A Segment Based On Contact Email Conversion Rates on page 484.

How Is The Conversion Rate Metric Calculated?

\[
\text{Conversion Rate} = \frac{\text{Conversions}}{\text{Clicks}} \times 100
\]

Tip: Clicks are representative of unique clicks. For more information on the clicks metric and how it calculated, see Clicks Metric on page 859.

Conversions Metric

The conversions metric represents the conversions recorded.

What Does The Conversions Metric Represent?

The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.

Tip: In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.

Why Is The Conversions Metric Important?

The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.

How Is The Conversions Metric Calculated?

The conversions metric is a total of all the conversions passed back to the application via the conversion tracking URL.

Tip: For more information on how the Orders Service works and how to set it up, see Configure Order Settings on page 1154.

Deferred Due To Message Content Metric

The deferred due to message content soft bounce type means that the email server has identified the email as spam.

What Does The Deferred Due To Message Content Metric Represent?

Deferred due to message content is quite similar to the rejected message content bounce. Emails aren't often identified this way, as ISPs don't want you to resend something they identify as spam.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.
Why Is The Deferred Due To Message Content Metric Important?
If you are seeing a majority of your emails being classified as deferred due to message content bounces, you should check your message and see if you can reduce its likelihood of being identified as spam.

Tip: For more information on soft bounces, see Email Bounce on page 196.

How Is The Deferred Due To Message Content Metric Calculated?
The deferred due to message content metric is a total of the bounces that were classified as bounces due to deferred message content.

Deliverability Rate Metric
The deliverability rate metric represents the unique clicks per contact.

What Does The Deliverability Rate Metric Represent?
The deliverability rate metric represents the average number of sent emails that are successfully delivered to your contacts. Another way to look at it is as the average of all the delivery rates for all the email deliveries in your account.

Why Is The Deliverability Rate Metric Important?
The deliverability rate metric is important because it gives you an overall indication into the health of email sending in your account. If your deliverability rate is low, then your contacts are not receiving emails from you and hence your marketing efforts will be unsuccessful.

Tip: For more information on fixing a low delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.

How Is The Deliverability Rate Metric Calculated?
(Total Sent - Total Bounced) / Total Sent

Delivered (Emails) Metric
The emails delivered metric represents the total number of emails that were successfully delivered.

What Does The Delivered (Emails) Metric Represent?
The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted

Why Is The Delivered (Emails) Metric Important?
The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.

How Is The Emails Delivered Metric Calculated?
Emails Sent - Undeliverable Email = Emails Delivered

Delivered (SMS) Metric
The Delivered (SMS) metric represents the total number of SMS messages that were successfully delivered.

What Does The Delivered (SMS) Metric Represent?
The Delivered (SMS) metric represents the total number of SMS messages that were successfully delivered.
How Is The Delivered (SMS) Metric Calculated?

\[ \text{SMS Total Sent} - \text{SMS Undeliverable} = \text{SMS Delivered} \]

Delivery Rate Metric
The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total number of emails sent.

What Does The Delivery Rate Metric Represent?
The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate

Why Is The Delivery Rate Metric Important?
The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.

Tip: If your delivery rate is low, you can look to the undeliverable metric to find out why contacts did not receive the emails you sent them. For more information on the undeliverable metric, see Undeliverable (Email) Metric on page 894.

How Is The Delivery Rate Metric Calculated?
\[ \frac{\text{Delivered}}{\text{Sent}} \times 100 = \text{Delivery Rate} \]

Delivery Rate (SMS) Metric
The Delivery Rate (SMS) metric represents the percentage of SMS messages that were successfully delivered.

What Does The Delivery Rate (SMS) Metric Represent?
The Delivery Rate (SMS) metric represents the percentage of SMS messages that were successfully delivered.

How Is The Delivery Rate (SMS) Metric Calculated?
\[ \frac{\text{SMS Delivered}}{\text{SMS Total Sent}} \times 100 = \text{SMS Delivery Rate} \]

Destination System Unreachable Metric
The destination system unreachable hard bounce type means that there was a connection issue with the email server.

What Does The Destination System Unreachable Metric Represent?
The destination system unreachable hard bounce type means that there was a connection issue with the email server.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Why Is The Destination System Unreachable Metric Important?
A destination system unreachable hard bounce is different than a bad email address hard bounce (which results in immediate removal of the contact in question). This bounce type means that we will not retry sending this specific email to this specific contact at this time because it is not likely to succeed. Later deliveries to the contact may succeed.

Tip: For more information on hard bounces, see Email Bounce on page 196.
How Is The Destination System Unreachable Metric Calculated?
The destination system unreachable metric is a total of the bounces that were classified as hard bounces due to the destination system being unreachable.

Destination System Temporarily Unreachable Metric
The destination system temporarily unreachable soft bounce type means that there was a connection issue with the email server.

What Does The Destination System Temporarily Unreachable Metric Represent?
Destination system temporarily unreachable soft bounce type means that there was a temporary issue at the receiving mail server, such as a server busy message.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Why Is The Destination System Temporarily Unreachable Metric Important?
A destination system temporarily unreachable bounce may be resolved via retries. If it is not, there is little you can do about this.

Tip: For more information on bounces, see Email Bounce on page 196.

How Is The Destination System Temporarily Unreachable Metric Calculated?
The destination system temporarily unreachable metric is a total of the bounces that were classified as soft bounces due to the destination system being temporarily unreachable.

Digg Shares Metric
The Digg shares metric represents the number of times an email you sent was shared using a Digg social sharing link. Digg social sharing links can be added to your messages to allow your contacts to share the message via Digg.

What Does The Digg Shares Metric Represent?
The Digg shares metric represents the total number of times Digg social sharing links contained in emails you sent were clicked. For example, if a contact clicks the Digg social sharing link 10 times, then 10 would be recorded for the Digg shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The Digg Shares Metric Important?
The Digg shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the Digg social sharing link, then most likely it means they found the email you sent them compelling enough to share it via Digg.

How Is The Digg Shares Metric Calculated?
The Digg shares metric is a total of the number of times the Digg social sharing link was clicked.

Digg Views Metric
The Digg views metric represents the total number of times a message shared via a Digg social sharing link was viewed.

What Does The Digg Views Metric Represent?
The Digg views metric represents the total number of times an email shared via a Digg social sharing link was viewed.
Note: Digg views will be counted for anyone that views the email shared via the Digg social sharing link, not just contacts in your account.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The Digg Views Metric Important?

The Digg views metric is important because it allows you to see how effective the email you sent is after it has been shared via Digg. This metric can give you insight into the effectiveness of using the Digg social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.

How Is The Digg Views Metric Calculated?

The Digg views metric is a total of the number of times an email shared via a Digg social sharing link was viewed.

Email Orders Metric

The Email Orders metric represents the number of orders made for a particular message, delivery, A/B split test, automated message rule, or delivery group.

What Does The Email Orders Metric Represent?

The Email Orders metric represents orders made from emails you sent from the application. These orders are the result of a contact clicking through an email you sent them and then placing an order. These orders have specific emails sent from the application associated with them. When a contact places an order as a result of being sent an email, a conversion is recorded. From a single conversion, multiple orders can be made. It is possible to have more orders than conversions. For example, if a contact clicks from an email to your site, purchases a shirt, and then also decides to purchase a hat, that could represent 2 orders made from 1 conversion.

Why Is The Email Orders Metric Important?

The Email Orders metrics is important because it allows you to see the number of orders directly tied to your email marketing efforts. Because a contact clicked though an email you sent them from the application, we are able to associate that order with a specific delivery and contact.

How Is The Email Orders Metric Calculated?

Total Orders - Other Orders = Email Orders

Tip: For more information on how the Orders Service works and how to set it up, see Configure Order Settings on page 1154.

Email Revenue Metric

The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.

What Does The Email Revenue Metric Represent?

The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.

Why Is The Email Revenue Metric Important?

The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.

How Is The Email Revenue Metric Calculated?

Total Revenue - Other Revenue = Email Revenue
Tip: For more information on how the Orders Service works and how to set it up, see Configure Order Settings on page 1154.

Likes (Facebook) Metric
The Facebook likes metric represents the total number of times Facebook users liked your Facebook message or individual post.

What Does The Likes (Facebook) Metric Represent?
The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Why Is The Likes (Facebook) Metric Important?
The Facebook likes metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. Generally speaking, it is a positive thing if someone takes the time to like your Facebook post.

How Is The Likes (Facebook) Metric Calculated?
The Facebook likes metric represents the total number of times Facebook users liked your Facebook message or individual post.

Facebook Shares Metric
The Facebook shares metric represents the total number of times the Facebook social sharing links contained in emails you sent were clicked.

What Does The Facebook Shares Metric Represent?
The Facebook shares metric represents the total number of times the Facebook social sharing links contained in emails you sent were clicked. For example, if a contact clicks the Facebook social sharing link 10 times, then 10 would be recorded for the Facebook shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Why Is The Facebook Shares Metric Important?
The Facebook shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the Facebook social sharing link, then most likely it means they found the email you sent compelling enough to share it with their Facebook network.

How Is The Facebook Shares Metric Calculated?
The Facebook shares metric is a total of the number of times the Facebook social sharing link was used.

Facebook Views Metric
The Facebook views metric represents the total number of times a message shared via a Facebook social sharing link was viewed.
What Does The Facebook Views Metric Represent?
The Facebook views metric represents the total number of times an email shared via a Facebook social sharing link was viewed.

Note: Facebook views will be counted for anyone that views the email shared via the Facebook social sharing link, not just contacts in your account.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Why Is The Facebook Views Metric Important?
The Facebook views metric is important because it allows you to see how effective the email you sent is after it has been shared via Facebook. This metric can give you insight into the effectiveness of using the Facebook social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.

How Is The Facebook Views Metric Calculated?
The Facebook views metric is a total of the number of times the Facebook social sharing links were viewed.

Forwards To A Friend Metric
The forwards to a friend metric represents the total number of times the forward to a friend link was clicked.

What Does The Forwards To A Friend Metric Represent?
The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link.

Tip: For more information on adding a forward to a friend link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on forward to a friend webforms, see Types of Webforms on page 204.

Why Is The Forwards To A Friend Metric Important?
The forwards to a friend metric is important because it highlights both contact engagement, and the effectiveness of the email you sent. If a contact makes the effort to use the forward to a friend link, most of the time it means they found the email you sent them compelling enough to forward it to a friend.

How Is The Forwards To A Friend Metric Calculated?
The forwards to a friend number is a total of the times the forwards to a friend link was used.

Frequency Cap (Skipped) Metric
The frequency cap (skipped) metric represents the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account.

What Does The Frequency Cap (Skipped) Metric Represent?
The frequency cap (skipped) metric represents the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account.

Tip: For more information on the email frequency cap settings, see Set Email Frequency Caps For Your Account on page 1330.
Why Is The Frequency Cap (Skipped) Metric Important?

There are several reasons why you might see a high number of emails skipped for exceeding your frequency cap settings. You could simply be scheduling too many deliveries to your contacts, or you might have an automated message rule that is sending too much. Skipped deliveries represent missed conversion opportunities, so you'll want to review your sending process to try and prevent skipped deliveries from occurring.

Tip: For more information on scheduling deliveries, see Send Email on page 279.

Tip: For more information on creating and setting up automated message rules, see Create Automated Message Rules Step 1 and Create Automated Message Rules Step 2.

How Is The Frequency Cap (Skipped) Metric Calculated?

The frequency cap (skipped) metric is a total of the deliveries skipped because they exceed your email frequency cap settings.

From Complaint Metric

The Complaint (From Complaint) metric is a total of the contacts lost after being unsubscribed in response to a complaint they made about an email they received from you.

What Does The From Complaint Metric Represent?

The Complaint (From Complaint) metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.

Tip: A contact can complain using a Complaint webform. For more information on Complaint webforms, see Types of Webforms on page 204.

Warning: A high number of complaints will negatively impact your sender and delivery rating. For more information on sender and delivery rating, see Sender and Delivery Rating on page 309.

Tip: For more information on fixing a low sender or delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.

Why Is The From Complaint Metric Important?

The Complaint (From Complaint) metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP or via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP or via the application.

How Is The From Complaint Metric Calculated?

Complaints From ISP Feedback Loops + Complaints via The Application = From Complaint

Note: A big part of CAN-SPAM compliance is honoring complaints and unsubscribe request in a timely fashion. For more information on CAN-SPAM compliance, see CAN-SPAM Act on page 200.

Tip: For more information on the From Complaint - Bronto Feedback metric, see From Complaint - Bronto Feedback Metric on page 873. For more information on the From Complaint - ISP Feedback metric, see From Complaint - ISP Feedback Metric on page 872.

From Complaint - ISP Feedback Metric

The From Complaint - ISP Feedback metric represents the total number of contacts that were lost (made inactive) by complaining via an ISP feedback loop.
What Does The From Complaint - ISP Feedback Metric Represent?

The *From Complaint - ISP Feedback* metric represents the number of contacts that were lost (made inactive) by complaining via an ISP feedback loop.

**Warning:** A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see *Sender and Delivery Rating* on page 309.

**Tip:** For more information on fixing a low sender or delivery rating, see *Tips For Fixing A Low Email Sender/Delivery Rating* on page 311.

Why Is The From Complaint - ISP Feedback Metric Important?

The *From Complaint - ISP Feedback* metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via their ISP, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain via their ISP. They can do this by clicking the *Report Spam* button (or similarly named button) after receiving an email from you.

How Is The From Complaint ISP Feedback Metric Calculated?

From Complaint - From Complaint Bronto Feedback = From Complaint ISP Feedback

**Note:** The *Complaint (From Complaint)* metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.

**Note:** A big part of CAN-SPAM compliance is honoring complaints and unsubscribe request in a timely fashion. For more information on CAN-SPAM compliance, see *CAN-SPAM Act* on page 200.

From Complaint - Bronto Feedback Metric

The *From Complaint - Bronto Feedback* metric represents the total number of contacts that were lost (made inactive) by complaining via the application.

What Does The From Complaint - Bronto Feedback Metric Represent?

The *From Complaint - Bronto Feedback* metric represents the number of contacts that were lost (made inactive) by complaining via the application. A contact can complain using a Complaint webform.

**Warning:** A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see *Sender and Delivery Rating* on page 309.

**Tip:** For more information on fixing a low sender or delivery rating, see *Tips For Fixing A Low Email Sender/Delivery Rating* on page 311.

**Tip:** For more information on *Complaint* webforms, see *Types of Webforms* on page 204.

Why Is The From Complaint - Bronto Feedback Metric Important?

The *From Complaint - Bronto Feedback* metric is important because it clarifies why you are losing contacts. If a contact is unsubscribed because they complained via the application, this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to complain the Complaint webform. They can do this by clicking the link to a Complaint webform in an email they receive from you.

How Is The From Complaint - Bronto Feedback Metric Calculated?

Total Complaints - From Complaint via ISP Feedback = From Complaint - Bronto Feedback

**Note:** The *Complaint (From Complaint)* metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.
Note: A big part of CAN-SPAM compliance is honoring complaints and unsubscribe request in a timely fashion. For more information on CAN-SPAM compliance, see CAN-SPAM Act on page 200.

GeoIP City Metric
The GeoIP City metric is the most frequent, non-mobile IP address recorded for a contact.

What Does The GeoIP City Metric Represent?
The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

Why Is The GeoIP City Metric Important?
Knowing the city of your contacts allows you to send targeted marketing communications based on City.

Tip: You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see Create A Segment Based On What City Contacts Are Located In on page 479.

How Is The GeoIP City Metric Calculated?
The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact.

GeoIP Country Metric
The GeoIP Country metric is the most frequent, non-mobile IP address recorded for a contact.

What Does The GeoIP Country Metric Represent?
The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

Why Is The GeoIP Country Metric Important?
Knowing the country of your contacts allows you to send targeted marketing communications based on country.

Tip: You can create segments based on GeoIP Country data stored in your account. For more information on how to create segments based on GeoIP Country data, see Create A Segment Based On What Country Contacts Are Located In on page 480.

How Is The GeoIP Country Metric Calculated?
The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact.

GeoIP Country Code Metric
The GeoIP Country Code metric is the most frequent, non-mobile IP address recorded for a contact.
What Does The GeoIP Country Code Metric Represent?
The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

Why Is The GeoIP Country Code Metric Important?
Knowing the country code of your contacts allows you to send targeted marketing communications based on the country code stored for contacts in your account.

Tip: You can create segments based on GeoIP Country Code data stored in your account. For more information on how to create segments based on GeoIP Country Code data, see Create A Segment Based On What Country Code Contacts Are Located In on page 479.

How Is The GeoIP Country Code Metric Calculated?
The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact.

GeoIP State/Region Metric
The GeoIP State/Region metric is the most frequent, non-mobile IP address recorded for a contact.

What Does The GeoIP State/Region Metric Represent?
The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

Why Is The GeoIP State/Region Metric Important?
Knowing the State/Region of your contacts allows you to send targeted marketing communications based on State/Region.

Tip: You can create segments based on GeoIP State/Region data stored in your account. For more information on how to create segments based on GeoIP State/Region data, see Create A Segment Based On What State Or Region Contacts Are Located In on page 482.

How Is The State/Region Metric Calculated?
The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact.

GeoIP Time Zone Metric
The GeoIP Time Zone metric is the most frequent, non-mobile IP address recorded for a contact.

What Does The GeoIP Time Zone Metric Represent?
The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.
Why Is The GeoIP Time Zone Metric Important?
Knowing the time zone of your contacts allows you to send targeted marketing communications based on the time zone stored for contacts in your account.

How Is The GeoIP Time Zone Metric Calculated?
The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact.

GeoIP Postal/ZIP Code Metric
The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact and does not necessarily indicate the Postal/ZIP code where they reside.

What Does The GeoIP ZIP Metric Represent?
The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

Why Is The GeoIP Postal/ZIP Code Metric Important?
Knowing the Postal/ZIP code of your contacts allows you to send targeted marketing communications based on Postal/ZIP code.

Tip: You can create segments based on GeoIP Postal/ZIP code data stored in your account. For more information on how to create segments based on GeoIP Postal/ZIP code data, see Create A Segment Based On What Postal/ZIP Code Contacts Are Located In on page 481.

How Is The GeoIP Postal/ZIP Code Metric Calculated?
The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact.

Hard Bounce Metric
The from hard bounce metric represents the number of sent messages that were not delivered due to hard bounces.

What Does The Hard Bounce Metric Represent?
Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Why Is The Hard Bounce Metric Important?
The from hard bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of hard bounces, you need to review who you are sending to and the content you are sending.

Tip: For more information on hard bounces, see Email Bounce on page 196.

How Is The Hard Bounce Metric Calculated?
Bad Email Address + Destination System Unreachable + Rejected Due To Message Content = From Hard Bounce

Note: The from hard bounce metric is a total of the 3 types of hard bounces recorded:
**Inactive Due To Bounces Metric**

The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account.

**What Does The Inactive Due To Bounces Metric Represent?**

The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. The bounce limit represents the number of times emails sent to a particular contact can consecutively bounce before the contact is made inactive. Once a contact is made inactive, you can no longer send to them until they once again opt-in to receiving marketing emails from you.

- **Tip:** For more information on bounces, see Email Bounce on page 196 in help.
- **Tip:** For more information on setting the bounce limit in your account, see Set A Bounce Limit For Your Account on page 1330.

**Why Is The Inactive Due To Bounces Metric Important?**

The inactive due to bounces metric is important because it better clarifies why you are losing contacts. If you notice a high number under inactive due to bounces, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.

**How Is The Inactive Due To Bounces Metric Calculated?**

The inactive due to bounces metric is a total of the contacts lost as a result of exceeding the bounce limit you have set in your account.

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**Incoming (SMS) Metric**

The *Incoming (SMS)* metric represents the total number of times contacts replied to an SMS message you sent them.

**What Does The Incoming (SMS) Metric Represent?**

The *Incoming (SMS)* metric represents the total number of times contacts replied to an SMS message you sent them.

- **Note:** Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

**How Is The Incoming (SMS) Metric Calculated?**

The *Incoming (SMS)* metric is a total of the number of times contacts replied to an SMS message you sent them.

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**Incoming Rate (SMS) Metric**

The *Incoming Rate (SMS)* metric represents the percentage replies recorded for an SMS message.

**What Does The Incoming Rate (SMS) Metric Represent?**

The *Incoming Rate (SMS)* metric represents the percentage replies recorded for an SMS message.

- **Note:** Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.
How Is The Incoming Rate (SMS) Metric Calculated?

(SMS Incoming / SMS Total Sent) * 100 = SMS Incoming Rate

Likes (Facebook) Metric

The Facebook likes metric represents the total number of times Facebook users liked your Facebook message or individual post.

What Does The Likes (Facebook) Metric Represent?

The Facebook likes metric represents the total number of times Facebook users liked your Facebook message or individual post.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Why Is The Likes (Facebook) Metric Important?

The Facebook likes metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. Generally speaking, it is a positive thing if someone takes the time to like your Facebook post.

How Is The Likes (Facebook) Metric Calculated?

The Facebook likes metric represents the total number of times Facebook users liked your Facebook message or individual post.

LinkedIn Shares Metric

The LinkedIn shares metric represents the number of times the email was shared using a LinkedIn social sharing link.

What Does The LinkedIn Shares Metric Represent?

The LinkedIn shares metric represents the total number of times the LinkedIn social sharing links contained in emails you sent were clicked. For example, if a contact clicks the LinkedIn social sharing link 10 times, then 10 would be recorded for the LinkedIn shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The LinkedIn Shares Metric Important?

The LinkedIn shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to click the LinkedIn social sharing link, then most likely it means they found the email you sent them compelling enough to share it with their LinkedIn network.

How Is The LinkedIn Shares Metric Calculated?

The LinkedIn shares metric is a total of the number of times the LinkedIn social sharing link was used.

LinkedIn Views Metric

The LinkedIn views metric represents the total number of times a message shared via a LinkedIn social sharing link was viewed.

What Does The LinkedIn Views Metric Represent?

The LinkedIn views metric represents the total number of times an email shared via a LinkedIn social sharing link was viewed.
Note: LinkedIn views will be counted for anyone that views the email shared via the LinkedIn social sharing link, not just contacts in your account.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The LinkedIn Views Metric Important?
The LinkedIn views metric is important because it allows you to see how effective the email you sent is after it has been shared via LinkedIn. This metric can give you insight into the effectiveness of using the LinkedIn social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.

How Is The LinkedIn Views Metric Calculated?
The LinkedIn views metric is a total of the number of times the LinkedIn social sharing links were viewed.

Replies (Twitter) Metric
The Twitter replies metric represents the total number of times users on Twitter replied to a post you make to Twitter.

What Does The Replies (Twitter) Metric Represent?
The Twitter replies metric represents the total number of times users on Twitter replied to a post you made to Twitter. A Twitter user can choose to reply directly to your account via a Twitter post they receive from you by clicking Reply in Twitter.

Why Is The Replies (Twitter) Metric Important?
The Twitter replies metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter replies, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to reply to a post.

How Is The Replies (Twitter) Metric Calculated?
The Twitter replies metric is a total of the replies recorded for a Twitter message or post.

Mobile Browser Metric
The mobile browser metric represents the mobile browser used by a contact.

What Does The Mobile Browser Metric Represent?
The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact.

Why Is The Mobile Browser Metric Important?
Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser.

Tip: You can create segments based on the mobile browser data stored for contacts in your account. For more information on how to create segments based on mobile browser data, see Create A Segment Based On The Mobile Browser Used By Contacts on page 488.

How Is The Mobile Browser Metric Calculated?
The mobile browser metric recorded for a contact is based on the mode of mobile browsers used by the contact.

Tip: The mode is the value (in this case, a mobile browser) that occurs most frequently in a data set.
Mobile Email Client Metric
The mobile email client metric represents the mobile browser used by a contact.

What Does The Mobile Email Client Metric Represent?
The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact.

Why Is The Mobile Email Client Metric Important?
Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client.

Tip: You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see Create A Segment Based On The Mobile Email Client Used By Contacts on page 489.

How Is The Mobile Email Client Metric Calculated?
The mobile email client metric recorded for a contact is based on the mode of mobile browsers used by the contact.

Tip: The mode is the value (in this case, a mobile email client) that occurs most frequently in a data set.

Multi-Part Messages (SMS) Metric
The Multi-Part Messages (SMS) metric displays the number of SMS messages that exceeded the 160 character limit and were split in to multiple parts.

What Does The Multi-Part Messages (SMS) Metric Represent?
The Multi-Part Messages (SMS) metric displays the number of SMS messages that exceeded the 160 character limit and were split in to multiple parts. Each part the message is split in to will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.

Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

How Is The Multi-Part Messages (SMS) Metric Calculated?
SMS Total Sent - SMS Single Recipients = SMS Multi-Part Messages

Multi-Part Recipients (SMS) Metric
The Multi-Part Recipients (SMS) metric displays the number of recipients who were sent an SMS message that was split in to multiple parts due to the message content exceeding the 160 character limit.

What Does The Multi-Part Recipients (SMS) Metric Represent?
The Multi-Part Recipients (SMS) metric displays the number of recipients who were sent an SMS message that was split in to multiple parts due to the message content exceeding the 160 character limit. Each message split will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.

Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit
will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

**How Is The Multi-Part Recipients (SMS) Metric Calculated?**

SMS Total Recipients - SMS Single Recipients = SMS Multi-Part Recipients

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**MySpace Shares Metric**

The MySpace shares metric represents the number of times the email was shared using a MySpace social sharing link.

**What Does The MySpace Shares Metric Represent?**

The MySpace shares metric represents the total number of times the MySpace social sharing links contained in emails you sent were clicked. For example, if a contact clicks the MySpace social sharing link 10 times, then 10 would be recorded for the MySpace shares metric.

**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116.

**Why Is The MySpace Shares Metric Important?**

The MySpace shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to click the MySpace social sharing link, then most likely it means they found the email you sent them compelling enough to share it with their MySpace network.

**How Is The MySpace Shares Metric Calculated?**

The MySpace shares metric is a total of the number of times the MySpace social sharing link was used.

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**MySpace Views Metric**

The MySpace views metric represents the total number of times a message shared via a MySpace social sharing link was viewed.

**What Does The MySpace Views Metric Represent?**

The MySpace views metric represents the total number of times an email shared via a MySpace social sharing link was viewed.

**Note:** MySpace views will be counted for anyone that views the email shared via the MySpace social sharing link, not just contacts in your account.

**Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116.

**Why Is The MySpace Views Metric Important?**

The MySpace views metric is important because it allows you to see how effective the email you sent is after it has been shared via MySpace. This metric can give you insight into the effectiveness of using the MySpace social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.

**How Is The MySpace Views Metric Calculated?**

The MySpace views metric is a total of the number of times the MySpace social sharing links were viewed.

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**Onboarding (Skipped) Metric**

The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time.
What Does The Onboarding (Skipped) Metric Represent?
The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time. If you are continually seeing a high number of contacts skipped due to onboarding, it could mean you are trying to import a bad list. If you are importing a healthy list, contacts should very quickly move from onboarding to active. So, if you are continually seeing high numbers under onboarding (Skipped), you should re-examine the contacts you are importing or adding.

Tip: For more information on the automated onboarding process, see Automated Onboarding on page 1081.

Why Is The Onboarding (Skipped) Metric Important?
The onboarding (skipped) metric is important for two reasons. First, it let's you know about any contacts that could not be sent to. Second, it gives you an indication of how the contacts you are importing are affecting your account.

How Is The Onboarding (Skipped) Metric Calculated?
The onboarding (skipped) metric is a total of the deliveries skipped because they exceed the limit of onboarding contacts you can currently send to.

Open Rate Metric
The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered.

What Does The Open Rate Metric Represent?
The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate. The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.

Why Is The Open Rate Metric Important?
The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.

Tip: You can create segments based on the open rates recorded for your contacts. For more information on creating segments based on open rates stored for your contacts, see Create A Segment Based On Contact Email Open Rates on page 485.

How Is The Open Rate Metric Calculated?
(Opens/Delivered) * 100 = Open Rate

Note: Opens are representative of unique opens.

Opens Metric
The opens metric represents the unique opens.

What Does The Opens Metric Represent?
The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders.
Why Is The Opens Metric Important?
The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.

How Is The Opens Metric Calculated?
The opens metric is a total of all the unique opens.

Operating System Metric
The operating system metric represents the operating system used by a contact.

What Does The Operating System Metric Represent?
The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.)

Why Is The Operating System Metric Important?
Knowing a contact's operating system can allow you to target your messages based the type of operating system a contact is using.

Tip: You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see Create A Segment Based On The Operating System Used By Contacts on page 486.

How Is The Operating System Metric Calculated?
The operating system metric recorded for a contact is based on the mode of operating systems used by the contact.

Tip: The mode is the value (in this case, an operating system) that occurs most frequently in a data set.

Other Orders Metric
The Other Orders metric represents orders that did not directly result from emails you sent from the application. You can pass in order data for contacts that is not associated with a specific delivery.

What Does The Other Orders Metric Represent?
The Other Orders metric represents orders that did not directly result from emails you sent from the application. You can pass in order data for contacts that is not associated with a specific delivery.

Why Is The Other Orders Metric Important?
The Other Orders metric is important because it helps to paint a complete picture of your revenue stream. With more complete order data, you can create more targeted segments based on how many orders a contact actually made, rather than just those orders from email.

Tip: You can create segments based on order data associated with a contact. For more information on creating segments based on order data associated with a contact, see Create A Segment Based On Order Data Stored For Contacts on page 460.

How Is The Other Orders Metric Calculated?
Total Orders - Email Orders = Other Orders

Tip: For more information on how the Orders Service works and how to set it up, see Configure Order Settings on page 1154.
Other Revenue Metric

The Other Revenue metric represents revenue that did not directly result from emails you sent from the application. You can pass in revenue data for contacts that is not associated with a specific delivery.

What Does The Other Revenue Metric Represent?

The Other Revenue metric represents revenue that did not directly result from emails you sent from the application. You can pass in revenue data for contacts that is not associated with a specific delivery.

Why Is The Other Revenue Metric Important?

The Other Revenue metric is important because it helps to paint a complete picture of your revenue stream. With more complete revenue data, you can create more targeted segments based on how much revenue is actually associated with a contact, rather than just revenue specifically from email.

Tip: You can create segments based on the Total Revenue recorded for contacts in your account. For more information on creating segments based on total revenue, see Create A Segment Based On The Total Revenue Recorded For Contacts on page 459.

How Is The Other Revenue Metric Calculated?

Total Revenue - Email Revenue = Other Revenue

Tip: For more information on how the Orders Service works and how to set it up, see Configure Order Settings on page 1154.

Percent Of Total Clicks Metric

The percent of total clicks metric represents the percentage of times a specific link was clicked, compared to the total number of clicks recorded for the message, delivery, A/B split test, automated message rule, or delivery group.

What Does The Percent Of Total Clicks Metric Represent?

The percent of total clicks metric represents the percentage of times a specific link was clicked, compared to the total number of clicks recorded for the message, delivery, A/B split test, automated message rule, or delivery group.

Why Is The Percent Of Total Clicks Metric Important?

The percent of total clicks metric is important because it highlights the effectiveness of a particular link used in your message, delivery, A/B split test, automated message rule, or delivery group.

Tip: A high number of clicks can mean very different things depending on the context. It could mean that contacts were intrigued enough by the content of your message to keep returning and clicking on a link more than once. However, it could mean that certain links produced unwanted or confusing results, leading to retries or duplicate clicks of a link.

How Is The Percent Of Total Clicks Metric Calculated?

\[
\text{Percent Of Total Clicks} = \left( \frac{\text{Total Clicks Per Link}}{\text{Total Clicks}} \right) \times 100
\]

Primary Browser Metric

The primary browser metric represents primary browser used by a contact. This includes mobile and non-mobile browsers.

What Does The Primary Browser Metric Represent?

The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.
**Why Is The Primary Browser Metric Important?**

Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails.

**Tip:** You can create segments based on the primary browser data stored for contacts in your account. For more information on how to create segments based on primary browser data, see Create A Segment Based On The Browser Used By Contacts on page 487.

**Tip:** The following help topics describe best practices and tools you can utilize to make sure your emails are designed for optimal display in a wide range of browsers:

- Previewer on page 971
- Good HTML Email Design on page 201
- Email Checklist: Before You Send on page 202

**How Is The Primary Browser Metric Calculated?**

The primary browser metric recorded for a contact is based on the mode of mobile and non-mobile browsers used by the contact.

**Tip:** The mode is the value (in this case, a browser) that occurs most frequently in a data set.

**Primary Email Client Metric**

The primary email client metric represents primary email client used by the contact. This includes mobile and non-mobile email clients.

**What Does The Primary Email Client Metric Represent?**

The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients.

**Why Is The Primary Email Client Metric Important?**

Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client.

**Tip:** You can create segments based on the primary email client data stored for contacts in your account. For more information on how to create segments based on primary email client data, see Create A Segment Based On The Email Client Used By Contacts on page 488.

**Tip:** The following help topics describe best practices and tools you can utilize to make sure your emails are designed for optimal display in a wide range of email clients:

- Previewer on page 971
- Good HTML Email Design on page 201
- Email Checklist: Before You Send on page 202

**How Is The Primary Email Client Metric Calculated?**

The primary email client metric recorded for a contact is based on the mode of email clients used by the contact.

**Tip:** The mode is the value (in this case, an email client) that occurs most frequently in a data set.

**Rejected Due To Message Content Metric**

The rejected due to message content hard bounce type means that the email server has identified the email as spam.

**What Does The Rejected Due To Message Content Metric Represent?**

The rejected due to message content hard bounce type means that the email server has identified the email as spam.
Why Is The Rejected Due To Message Content Metric Important?
We will not attempt to resend an email that results in a rejected due to message content hard bounce. If you see a number of these, then you should probably look at the message you are sending and take the time to run your message through a spam test. If you are still having problems or have questions about what may be causing this, please contact support.

How Is The Rejected Due To Message Content Metric Calculated?
The rejected due to message content metric is a total of the bounces that were classified as hard bounces due to rejected message content.

Retweets (Twitter) Metric
The Twitter retweets metric represents the total number of times a Twitter post is retweeted.

What Does The Retweets (Twitter) Metric Represent?
The Twitter retweets metric represents the total number of times a Twitter post is retweeted. When a message is posted to Twitter, Twitter users can retweet the post and share it with all of their followers.

Why Is The Retweets (Twitter) Metric Important?
The Twitter retweets metric is important because it represents a level of engagement with users on Twitter. If a user on Twitter retweets a Twitter message you posted, this generally means they were interested enough in the content of the post to share it with all of their Twitter followers. Retweets have the potential to expose your Twitter posts to a very large audience in a very short period of time.

How Is The Retweets (Twitter) Metric Calculated?
The Twitter retweets metric is a total of all the times a Twitter post was retweeted.

Revenue Per Email Metric
The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.

What Does Revenue Per Email Metric Represent?
The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.

Why Is The Revenue Per Email Metric Important?
The Revenue Per Email metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.

How Is The Revenue Per Email Metric Calculated?
Email Revenue / Delivered = Revenue Per Email

Revenue Per Order Metric
The Revenue Per Order metric represents the average revenue generated per order tracked in your account.
What Does The Revenue Per Order Metric Represent?
The Revenue Per Order metric represents the average revenue generated per order tracked in your account.

Why Is The Revenue Per Order Metric Important?
The Revenue Per Order metric is important because it gives you an idea of how much contacts are spending, on average, each time an order is made.

Tip: Conversions and Orders are not the same metric. For information on what each metric means and how it's calculated, see Conversions Metric on page 865 and Total Orders Metric on page 891.

How Is The Revenue Per Order Metric Calculated?
Revenue / Orders = Revenue Per Order

Sent (Emails) Metric
The Emails sent metric represents the total number of emails that were sent. Deleted deliveries will still be counted as part of the emails sent metric.

What Does The Sent (Emails) Metric Represent?
The emails sent metric represents the total number of emails that were sent.

Note: Deleted email deliveries will still be counted as part of the emails sent metric.

Why Is The Sent (Emails) Metric Important?
The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.

Warning: If there is a big difference between the emails sent number and the delivered number, then that means a lot of your email messages are not getting to your contacts. You can view the deliverability report to find out more information on why emails are not getting delivered.

Tip: For more information on the deliverability report, see Report Deliverability Metrics (Legacy) on page 714.

Tip: You can create segments based on the number emails sent to your contacts. For more information on creating segments based on the number of emails sent to your contacts, see Create A Segment Based On The Number Of Emails Sent To Contacts on page 485.

How Is The Sent (Emails) Metric Calculated?
The emails sent metric is simply a total of the emails that were sent.

Single Recipients (SMS) Metric
The Single Recipients (SMS) metric represents the count of recipients receiving a single SMS message.

What Does The Single Recipients (SMS) Metric Represent?
The Single Recipients (SMS) metric represents the count of recipients receiving a single SMS message. You can compare this metric with the Multi-Part Recipients (SMS) metric to find out the Total Recipients (SMS) metric.

How Is The Single Recipients (SMS) Metric Calculated?
SMS Total Recipients - SMS Multi-Part Recipients = SMS Single Recipients
Skipped Metric
The skipped metric represents the total number of contacts that were skipped (e.g. were not sent).

What Does The Skipped Metric Represent?
The skipped metric represents the total number of emails that were skipped and not sent to.

Why Is The Skipped Metric Important?
The skipped metric is important because it lets you know how many emails were not sent.

Note: For more detailed information on why a delivery was skipped, see the following metrics:
• Onboarding (Skipped) Metric on page 881
• Frequency Cap (Skipped) Metric on page 871

How Is The Skipped Metric Calculated?
Skipped Due To Onboarding + Skipped Due To Frequency Caps = Skipped

Social Views Metric
The social views metric represents the total number of times a message shared via social sharing links was viewed.

What Does The Social Views Metric Represent?
The social views metric represents the total number of times an email shared via social sharing links was viewed.

Note: Views will be counted for anyone that views the email shared via social sharing links, not just contacts in your account. Forward to a friend URLs are not included in the social shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The Social Views Metric Important?
The social views metric is important because it allows you to see how effective the email you sent is after it has been shared via social sharing links. This metric can give you insight into the effectiveness of using social sharing links in your emails, as well as the effectiveness of your emails with an audience outside your contacts.

How Is The Social Views Metric Calculated?
Facebook views + Twitter Views + LinkedIn views + MySpace views + Digg views = Social Views

Note: The social views metric is a total of the number of times the social sharing links were viewed.

Soft Bounce Metric
The from soft bounce metric represents the number of sent messages that were not delivered due to soft bounces.

What Does The Soft Bounce Metric Represent?
Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Why Is The Soft Bounce Metric Important?
The soft bounce metric is important because it clarifies why contacts cannot be delivered to. If you are seeing a lot of soft bounces, you should review who you are sending to and the content you are sending.
**Tip:** For more information on soft bounces, see Email Bounce on page 196.

**How Is The Soft Bounce Metric Calculated?**
The from soft bounce metric is a total of the soft bounces recorded.

**Temporary Contact Issue Metric**
Temporary contact issue means that there was a temporary issue at the receiving mail server with respect to the contact in question. An example of this is a mailbox full message.

**What Does The Temporary Contact Issue Metric Represent?**
Temporary contact issue means that there was a temporary issue at the receiving mail server with respect to the contact in question. An example of this is a mailbox full message.

**Tip:** For more information on the bounce classification system, see Email Bounce on page 196.

**Why Is The Temporary Contact Issue Metric Important?**
There isn't too much you can do about a temporary contact issue bounce. It may, however, be an early indicator that a user has abandoned this email address. If you want to be pro-active and try to stem these type of bounces from occurring, include the manage preferences link (using `%%!manage_url%%`) within your emails, in addition to the unsubscribe link. This allows users to easily update their email address.

**Tip:** For more information on bounces, see Email Bounce on page 196.

**Tip:** For more information on manage preferences webforms, see Types of Webforms on page 204.

**How Is The Temporary Contact Issue Calculated?**
The temporary contact issue metric is a total of the bounces that were classified as bounces due to a temporary contact issue.

**Total Clicks Metric**
The total clicks metric represents the total number of times links were clicked for a particular message, delivery, A/B split test, automated message rule, or delivery group.

**What Does The Total Clicks Metric Represent?**
The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe

- clicks link A 10 times
- and clicks link B 5 times

And Taylor Doe

- clicks link B 5 times

Then 20 total clicks are recorded.

**Why Is The Total Clicks Metric Important?**
The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.
Tip: A high number of clicks can mean very different things depending on the context. It could mean that contacts were intrigued enough by the content of your message to keep returning to it clicking on a link more than once, or it could mean that certain links produced unwanted or confusing results, leading to re-tries or duplicate clicks of a link.

Tip: The clicks metric is a measure of the unique clicks. For more information on the clicks metric, see Clicks Metric on page 859.

How Is The Total Clicks Metric Calculated?
The total clicks metric is a total of all times links were clicked in a particular message, delivery, A/B split test, automated message rule, or delivery group.

Total Clicks Per Link Metric
The total clicks per link metric represents the total number of times a specific link was clicked in a particular message, delivery, A/B split test, automated message rule, or delivery group. If a contact clicks link A in your message 10 times, then 10 clicks would be recorded for that particular link.

What Does The Total Clicks Per Link Metric Represent?
The total clicks per link metric represents the total number of times a specific link was clicked in a particular message, delivery, A/B split test, automated message rule, or delivery group. If a contact clicks link A in your message 10 times, then 10 clicks would be recorded for that particular link.

Why Is The Total Clicks Per Link Metric Important?
The total clicks per link metric is important because it represents a level of contact engagement beyond just opens and highlights the effectiveness of specific links.

Tip: A high number of clicks can mean very different things depending on the context. It could mean that contacts were intrigued enough by the content of your message to keep returning to it clicking on a link more than once, or it could mean that certain links produced unwanted or confusing results, leading to re-tries or duplicate clicks of a link.

Tip: The clicks per link metric is a measure of the unique clicks per link. For more information on the clicks per link metric, see Clicks Per Link Metric on page 860.

How Is The Total Clicks Per Link Metric Calculated?
The total clicks per link metric is a total of all times a specific link was clicked in a particular message, delivery, A/B split test, automated message rule, or delivery group.

SMS Total Clicks Metric
The Total Clicks (SMS) metric represents the total number of times links contained in an SMS message were clicked.

What Does The Total Clicks (SMS) Metric Represent?
The Total Clicks (SMS) metric represents the total number of times links contained in an SMS message were clicked.

How Is The Total Clicks (SMS) Metric Calculated?
The Total Clicks (SMS) metric is the sum of all the clicks recorded for an SMS message.

Total Opens Metric
The total opens metric represents the total opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group.
What Does The Total Opens Metric Represent?
The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.

Note: The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see Opens Metric on page 882.

Why Is The Total Opens Metric Important?
The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.

Tip: Because total opens are recorded each time an open occurs, this could indicate a high level of interest (i.e. repeat opens), but it is difficult to say for sure. You can get a better idea of contact engagement by seeing what happens after a contact opens your email. In other words, you should have a look at clicks and conversions.

How Is The Total Opens Metric Calculated?
The total opens metric is a total of all times an open was recorded for a particular message, delivery, A/B split test, automated message rule, or delivery groups

Total Recipients (SMS) Metric
The Total Recipients (SMS) metric represents the total count of recipients who received an SMS message.

What Does The Total Recipients (SMS) Metric Represent?
The Total Recipients (SMS) metric represents the total count of recipients who received an SMS message.

How Is The Total Recipients (SMS) Metric Calculated?
SMS Single Recipients + SMS Multi-Part Recipients = SMS Total Recipients

Total Sent (SMS) Metric
The Total Sent (SMS) metric represents the total number of SMS messages that were sent.

What Does The Total Sent (SMS) Metric Represent?
The Total Sent (SMS) sent metric represents the total number SMS messages sent. The Total Sent (SMS) metric is important to know for the purpose of making sure you don't exceed the number of SMS messages allocated for your account.

How Is The Total Sent (SMS) Metric Calculated?
SMS Delivered + SMS Undeliverable = SMS Total Sent

Total Orders Metric
The Total Orders metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.
What Does The Total Orders Metric Represent?
The *Total Orders* metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.

Why Is The Total Orders Metric Important?
The Total Orders metric allows you to view the total number of orders in your account, rather than just those resulting from email.

Tip: You can create segments based on order data associated with a contact. For more information on creating segments based on order data associated with a contact, see Create A Segment Based On Order Data Stored For Contacts on page 460.

How Is The Total Orders Metric Calculated?
Email Orders + Other Orders = Total Orders

Tip: For more information on how the Orders Service works and how to set it up, see Configure Order Settings on page 1154.

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Total Revenue Metric
The *Total Revenue* metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.

What Does The Total Revenue Metric Represent?
The *Total Revenue* metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.

Why Is The Total Revenue Metric Important?
The *Total Revenue* metric allows you to view the total amount of revenue tracked in your account, rather than just the revenue from email.

Tip: You can create segments based on the *Total Revenue* recorded for contacts in your account. For more information on creating segments based on total revenue, see Create A Segment Based On The Total Revenue Recorded For Contacts on page 459.

How Is The Total Revenue Metric Calculated?
Email Revenue + Other Revenue = Total Revenue

Tip: For more information on how the Orders Service works and how to set it up, see Configure Order Settings on page 1154.

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Total Social Shares Metric
The total social shares metric represents the total number of times social sharing links were used.

What Does The Total Social Shares Metric Represent?
The total social shares metric represents the total number of times social sharing links contained in the email were clicked. For example, if one contact uses the Twitter social sharing link, and another contact uses the Facebook social sharing link, then 2 would be recorded for the total social shares.

Note: Forward to a friend URLs are not included in the total social shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.
Why Is The Total Social Shares Metric Important?
The total social shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the social sharing links, then most likely it means they found the email you sent them compelling enough to share it with one of their social networks.

How Is The Total Social Shares Metric Calculated?
Delivered/ Total Social Shares * 100 = Social Shares percentage

Note: The total social shares metric is a total of the number of times the social sharing links were used.

Twitter Shares Metric
The Twitter shares metric represents the number of times the email was shared using a Twitter social sharing link.

What Does The Twitter Shares Metric Represent?
The Twitter shares metric represents the total number of times the Twitter social sharing links contained in emails you sent were clicked. For example, if a contact uses the Twitter social sharing link 2 times, then 2 would be recorded for the Twitter shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The Twitter Shares Metric Important?
The Twitter shares metric is important because it highlights both contact engagement and the effectiveness of the email you sent. If a contact takes the time to use the Twitter social sharing link, then most likely it means they found the email you sent them compelling enough to share it with their followers on Twitter.

How Is The Twitter Shares Metric Calculated?
The Twitter shares metric is a total of the number of times the Twitter social sharing link was used.

Twitter Views Metric
The Twitter views metric represents the total number of times a message shared via a Twitter social sharing link was viewed.

What Does The Twitter Views Metric Represent?
The Twitter views metric represents the total number of times an email shared via a Twitter social sharing link was viewed.

Note: Twitter views will be counted for anyone that views the email shared via the Twitter social sharing link, not just contacts in your account.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Why Is The Twitter Views Metric Important?
The Twitter views metric is important because it allows you to see how effective the email you sent is after it has been shared via Twitter. This metric can give you insight into the effectiveness of using the Twitter social sharing link in your emails, as well as the effectiveness of your emails with an audience outside your contacts.

How Is The Twitter Views Metric Calculated?
The Twitter views metric is a total of the number of times the Twitter social sharing links were viewed.
Unclassified Metric
The unclassified metric represents the number of bounces that could not be classified using our bounce classification system.

What Does The Unclassified Metric Represent?
The unclassified metric represents the number of bounces that could not be classified using our bounce classification system. We try our best to classify bounces and keep from showing them as unclassified so that you can better understand why bounces are occurring.

Why Is The Unclassified Metric Important?
We developed our bounce classification system in such a way that the most common types of bounces would always be classified. If you are noticing a high number of unclassified bounces, then something outside of normal circumstances is likely occurring. In this case, you should contact support for assistance in diagnosing the problem.

How Is The Unclassified Metric Calculated?
The unclassified metric is a total of the bounces that could not be classified using our bounce classification system.

Undeliverable (Email) Metric
The email undeliverable metric represents the number of sent messages that were not delivered.

What Does The Undeliverable (Email) Metric Represent?
The email undeliverable metric represents the number of sent emails that were not delivered.

Why Is The Undeliverable (Email) Metric Important?
The email undeliverable metric is important because it tells you how many of your sent emails were not delivered.

How Is The Undeliverable (Email) Metric Calculated?
The email undeliverable metric is a total of all the bounces recorded.

Undeliverable (SMS) Metric
The Undeliverable (SMS) metric represents the number of sent SMS messages that were not delivered.

What Does The Undeliverable (SMS) Metric Represent?
The Undeliverable (SMS) metric represents the number of sent SMS messages that were not delivered.

How Is The Undeliverable (SMS) Metric Calculated?
SMS Total Sent - SMS Delivered = SMS Undeliverable

Undeliverable Rate (SMS) Metric
The Undeliverable Rate (SMS) metric represents the percentage of SMS messages that were not delivered.

What Does The Undeliverable Rate (SMS) Metric Represent?
The Undeliverable Rate (SMS) metric represents the percentage of SMS messages that were not delivered.

How Is The Undeliverable Rate (SMS) Metric Calculated?
(SMS Undeliverable / SMS Total Sent) * 100 = SMS Undeliverable Rate
SMS Unique Clicks Metric
The *Unique Clicks (SMS)* metric is the sum of all the unique clicks recorded for an SMS message.

**What Does The Unique Clicks (SMS) Metric Represent?**
The *Unique Clicks (SMS)* metric is the sum of all the unique clicks recorded for an SMS message. A *unique click* is recorded the first time a contact clicks any link contained in an SMS you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.

**Note:** The *Unique Clicks (SMS)* metric if not the same as the *Total Clicks (SMS)* metric. For more information on the *Total Clicks (SMS)* metric and how it is calculated, see SMS Total Clicks Metric on page 890.

**How Is The Unique Clicks (SMS) Metric Calculated?**
The *Unique Clicks (SMS)* metric is the sum of all the unique clicks recorded for an SMS message.

Unsubscribe Rate Metric
The *Unsubscribe Rate* metric represents the percentage of contacts that were lost (made inactive) by unsubscribing.

**What Does The Unsubscribes Rate Metric Represent?**
The *Unsubscribe Rate* metric represents the percentage of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.

**Tip:** For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

**Why Is The Unsubscribes Rate Metric Important?**
The *Unsubscribe Rate* metric is important because it shows the rate at which contacts are unsubscribing. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric. You can monitor this metric overtime to see if changes to your sending habits are lowering the *Unsubscribe Rate*.

**How Is The Unsubscribes Rate Metric Calculated?**

\[
\text{(Unsubscribes/Sent)} \times 100 = \text{Unsubscribe Rate}
\]

Unsubscribes Metric
The unsubscribes metric represents the total number of contacts that were lost (made inactive) by unsubscribing.

**What Does The Unsubscribes Metric Represent?**
The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.

**Tip:** For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

**Why Is The Unsubscribes Metric Important?**
The unsubscribes metric is important because it better clarifies why you are losing contacts. If a contact unsubscribes themselves (via a manage preferences form or other method), this tells you that either you are sending to the wrong people, or sending the wrong content. Unlike bounces, which are the result of technical errors sent back from the receiving mail server, a contact actually has to manually unsubscribe themselves to be counted in this metric.
How Is The Unsubscribes Metric Calculated?

Contact Loss - From Complaints - Inactive Due To Bounces = Unsubscribes

Tip: For more information on other metrics used calculating the unsubscribes metric, see Contact Loss Metric on page 862, From Complaint Metric on page 872, and Inactive Due To Bounces Metric on page 877.

View Or Export

View or Export Knowledge Base topics cover how to search for and view data that is found in Bronto tables and how to export the data once it's been found.

If you're looking for information about viewing or exporting reports, it can be found in the reporting menu.

Search For Contacts In Your Account

You can use the search box on the Search Contacts page to quickly locate specific contacts.

Tip: The most efficient way to find specific types of contacts, such as contacts with a certain click rate, contacts with a certain field value, or contacts updated in the last X number of days, is to create a segment. Segments are automatically kept up to date, meaning contacts automatically move on and off of segments based on whether or not they match the criteria used in the segment. This allows you to return to a segment at any time to view the specific type of contact described by the segment. For example, if you create a segment for contacts whose email address contains "gmail”, you can calculate the segment to find the contacts whose email address currently contains "gmail". Provided you save the segment, you can return to that segment in the future and see an updated listing of contacts whose email address contains "gmail".

For more information on creating segments, see Segment Builder on page 435.

To search all the contacts in your account:

1. Go to Tables > Contacts > Search Contacts.
2. Using the All Contacts pull-down menu, select the type of contacts you want to search for. You can select:
   - All Contacts
   - Active Contacts
   - Inactive Contacts

   Tip: Active contacts are "live" contacts that can receive marketing emails from you. Inactive contacts cannot receive marketing emails from you. Contacts are designated as active or inactive based on their status.

   For more information on the different types of contact status, see Contact Status on page 1083.
3. Using the Email pull-down menu, select how you want to search for contacts.
   You can search by email address, mobile number, email domain, or any field you have created in your account.
4. Only if you select to search by Email or Mobile Number: Use the Exactly pull-down menu to select how to optimize your search. Select either:
   - Exactly - This is the best option if you need to quickly find a contact and already know what their email address is.
   - Starts with - This is the best option if you know what a contact's email address starts with, but aren't sure of the ending or the domain used. You can also use this option to perform grouped searches (e.g. I want all contacts whose email address starts with j).
   - Contains - This is the best option if you only know part of the email address or need to do a group search. For example, you could search for all email addresses that contain gmail.com.
5. Using the **Sort by:** pull-down menu, select the column that will be sorted by default.

6. Click **Search.**
   The contacts that match your search criteria are displayed.

7. Click on a contact's email address to view more detailed information about an individual contact.

**Related Topics**

- **Segment Builder** on page 435
  These help topics describe how to use the segment builder.

- **Contact Fields** on page 558
  Contact fields are data containers that you can use to save information about your contacts.

- **Contact Imports** on page 1080
  The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

- **Clean Contacts** on page 1399

**Related Topics**

- **Contact Status** on page 1083
  Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

### Search Contacts Page Default Columns

The columns described in this section are the default columns shown on the **Search Contacts** page.

More columns can be added which contain additional metrics/information. For information on the additional columns that can be added, see **Search Contacts Page Optional Columns** on page 899. For more information on showing additional columns, see **Hide or Show Columns In A Table** on page 1568.

#### Default Columns

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The email address stored for the contact.</td>
<td>An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Status (Email)</td>
<td>The current status of the contact.</td>
<td>This indicates whether or not you can send marketing emails to them, and the level of engagement you have with them.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on each type of contact status, see Contact Status on page 1083.</td>
<td></td>
</tr>
<tr>
<td>Created</td>
<td>The date the contact was created.</td>
<td>This date lets you keep track of whether or not contacts are still engaged with you.</td>
</tr>
<tr>
<td>Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
<td></td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Message Format (Email)</td>
<td>The email message format preferred by the contact (HTML or Text).</td>
<td>It is important to know which type of email message your contacts prefer to receive, as this can affect the design of your email messages. For example, you wouldn't want to send an email message with a lot of images to a contact who prefers text only emails.</td>
</tr>
</tbody>
</table>

**Warning:** The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

**Related Topics**

Hide or Show Columns In A Table on page 1568
You can hide table columns in order to only display the metrics you need.

**Search Contacts Page Optional Columns**

The columns described in this section are hidden by default on the Search Contacts page.

For more information on displaying the hidden columns, see Hide or Show Columns In A Table on page 1568.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on mobile numbers stored in your account. For more information on how to create segments based on mobile numbers, see Create A Segment Based On Contact Mobile Numbers on page 458.</td>
</tr>
<tr>
<td>API ID</td>
<td>The contact's API ID.</td>
<td>This information is useful if you are searching for a specific contact based on their API ID.</td>
</tr>
<tr>
<td>Facebook</td>
<td>Whether or not the contact's Facebook account is connected.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Twitter</td>
<td>Whether or not a Twitter handle is stored for the contact.</td>
<td>Storing a person's Twitter handle opens up the possibility for another channel of communication.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
<td>Tip: You can create segments based on the last date a delivery was sent to a contact. For more information on creating a segment based on the last date a delivery was sent to a contact, see Create A Segment Based On The Last Date A Delivery Was Sent To A Contact on page 477.</td>
</tr>
<tr>
<td></td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
<td></td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
<td>Tip: You can create segments based on the last date a click was recorded for a contact. For more information on creating a segment based on the last date a click was recorded for a contact, see Create A Segment Based On The Last Date A Click Was Recorded For A Contact on page 473.</td>
</tr>
<tr>
<td></td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
<td></td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date an open was recorded for a contact. For more information on creating a segment based on the last date an open was recorded for a contact, see Create A Segment Based On The Last Date An Open Was Recorded For A Contact on page 475.</td>
<td></td>
</tr>
<tr>
<td>Last Unsubscribe Date</td>
<td>The last time the contact unsubscribed from receiving marketing emails from you. If the contact is still unsubscribed, the Status column will display Unsubscribed for that contact.</td>
<td><strong>Tip:</strong> You can create a segment based on the last date a contact unsubscribed. For more information on creating a segment based on the last date a contact unsubscribed, see Create A Segment Based On The Last Date A Contact Unsubscribed on page 455.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact.</td>
</tr>
<tr>
<td><strong>First Order Date</strong></td>
<td>The date of the first order recorded for the contact.</td>
<td>You can use the first order date to find out when a contact began placing orders with you.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Last Order Date  | The date of the last (or most recent) order recorded for the contact.        | You can use the last order date to find out the last time a contact placed an order with you.  
**Tip:** You can create segments based on the last order date stored for a contact. For more information on creating a segment based on the last order date recorded for a contact, see [Create Segments Based On Contact RFM Metrics](#) on page 462. |
| Last Order Total | The total amount of the last (or most recent) order recorded for the contact.| You can use the last order total to find out the revenue from the last order placed by the contact.  
**Tip:** You can create segments based on the last order total stored for a contact. For more information on creating a segment based on the last order total recorded for a contact, see [Create Segments Based On Contact RFM Metrics](#) on page 462. |
| Total Orders     | The total number of orders recorded for the contact.                        | You can use the total orders number to find out how many orders a contact has placed with you.  
**Tip:** You can create segments based on the total orders stored for a contact. For more information on creating a segment based on the total orders recorded for a contact, see [Create Segments Based On Contact RFM Metrics](#) on page 462. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenue</td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tip: You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>Average Order Value</td>
<td>The average order value recorded for the contact.</td>
<td>You can use the average order value metric to find out the average revenue for orders made by a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tip: You can create segments based on the average order value stored for a contact. For more information on creating a segment based on the average order value recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>GeoIP City</td>
<td>The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.</td>
<td>Knowing the city of your contacts allows you to send targeted marketing communications based on City.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tip: You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see <a href="#">Create A Segment Based On What City Contacts Are Located In</a> on page 479.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------------</td>
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<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>GeoIP State/Region</td>
<td>The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields.</td>
<td>Knowing the State/Region of your contacts allows you to send targeted marketing communications based on State/Region. <strong>Tip:</strong> You can create segments based on GeoIP State/Region data stored in your account. For more information on how to create segments based on GeoIP State/Region data, see Create A Segment Based On What State Or Region Contacts Are Located In on page 482.</td>
</tr>
<tr>
<td>GeoIP Zip</td>
<td>The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields.</td>
<td>Knowing the Postal/ZIP code of your contacts allows you to send targeted marketing communications based on Postal/ZIP code. <strong>Tip:</strong> You can create segments based on GeoIP Postal/ZIP code data stored in your account. For more information on how to create segments based on GeoIP Postal/ZIP code data, see Create A Segment Based On What Postal/ZIP Code Contacts Are Located In on page 481.</td>
</tr>
<tr>
<td>GeoIP Country</td>
<td>The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields.</td>
<td>Knowing the country of your contacts allows you to send targeted marketing communications based on country. <strong>Tip:</strong> You can create segments based on GeoIP Country data stored in your account. For more information on how to create segments based on GeoIP Country data, see Create A Segment Based On What Country Contacts Are Located In on page 480.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>GeoIP Country Code</strong></td>
<td>The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas.</td>
<td>Knowing the country code of your contacts allows you to send targeted marketing communications based on the country code stored for contacts in your account.</td>
</tr>
<tr>
<td><strong>GeoIP Time Zone</strong></td>
<td>The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.</td>
<td>Knowing the time zone of your contacts allows you to send targeted marketing communications based on the time zone stored for contacts in your account.</td>
</tr>
<tr>
<td><strong>Primary Browser</strong></td>
<td>The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.</td>
<td>Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on primary browser data stored for contacts in your account. For more information on how to create segments based on primary browser data, see Create A Segment Based On The Browser Used By Contacts on page 487.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mobile Browser</td>
<td>The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact.</td>
<td>Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser. <strong>Tip:</strong> You can create segments based on the mobile browser data stored for contacts in your account. For more information on how to create segments based on mobile browser data, see Create A Segment Based On The Mobile Browser Used By Contacts on page 488.</td>
</tr>
<tr>
<td>Primary Email Client</td>
<td>The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients.</td>
<td>Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client. <strong>Tip:</strong> You can create segments based on the primary email client data stored for contacts in your account. For more information on how to create segments based on primary email client data, see Create A Segment Based On The Email Client Used By Contacts on page 488.</td>
</tr>
<tr>
<td>Mobile Email Client</td>
<td>The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact.</td>
<td>Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client. <strong>Tip:</strong> You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see Create A Segment Based On The Mobile Email Client Used By Contacts on page 489.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Operating System</td>
<td>The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.)</td>
<td>Knowing a contact's operating system can allow you to target your messages based the type of operating system a contact is using.</td>
</tr>
</tbody>
</table>

**Tip:** You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see Create A Segment Based On The Operating System Used By Contacts on page 486.

**Warning:** The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

**Note:** GeoIP data is based on the mode (the value that appears most often) of non-mobile IP addresses recorded for a contact. GeoIP data is not stored for mobile clients because it is deemed unreliable.

**Related Topics**

Hide or Show Columns In A Table on page 1568
You can hide table columns in order to only display the metrics you need.

**Find Newly Created Contacts In Your Account**

The easiest and most efficient way to find the newly created contacts in your account is to create a segment. Create a segment has the added benefit of always staying up to date. You can return to the segment at anytime to view the contacts created in the last X number of days, weeks, months, or years.

To create a segment that contains the newly created contacts in your account:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon 🖋️ in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **Add Criteria** if you want to add another criteria.
5. Click **Contacts**.
6. Click **Created Date**.
7. Select **Is Within The Last** from the first pull-down menu.
8. Enter a number in the text box.
9. Select one of the following from the second pull-down menu:
   - Days
   - Weeks
   - Months
   - Years
10. Click Save And Close.

Add Contacts To A List From The Search Contacts Page

The Add To List button on the Search Contacts page lets you add a single contact or multiple contacts to an existing list or a new list.

To add contacts to a list on the Search Contacts page:

1. Go to Tables > Contacts > Search Contacts.
2. Find the contact(s) you want to add to a list using the search settings.
   For more information on searching for contacts, see Search For Contacts In Your Account on page 896.
3. Click the checkbox next to the email address of the contact(s) you want to add to a list.
4. Click Add To List.
5. Click the
   • Existing List radio button to add the contact(s) to an existing list.
   • New List radio button to add the contact(s) to a new list.
6. If you clicked the Existing List radio button: Click in the row associated with the list you want to add the contact(s) to.
7. If you clicked the New List radio button:
   a) Add an internal list name in the Internal Name text box.
      The internal name that you assign to your list is only visible to users within your account.
   b) Add an external list name in the External Name text box.
      The external name is the name that will appear to your contacts if you make this list visible on a webform.
8. Click Submit.

Recording Consent Overview

To be compliant with GDPR, Bronto records any status change to active, onboarding, unsubscribed, unconfirmed, or deleted contacts.

The statuses are:

• Opt-in
• Opt-out
• Unconfirmed
• Deleted

For each consent change, Bronto records the email address, the consent date, whether that date was specified by the customer, an IP address if available, and where that consent change occurred.

Details on the source will depend on the source itself. For example, if a contact was created through Dataloader, the source will show as API and the details showing the name of the integration would be the API token name. If it was a bulk import, it will show the user who initiated the action, as well as the name of the file and the type of operation performed.

If a contact is created as transactional, Forward to Friend, or unsubscribe, this action will not be logged in the consent record. If the contact changes status and is moved from active to transactional, it will be recorded. Consent change is also recorded when a contact changes their email address.

The consent log is not visible in the Contact Details page, but it can be downloaded.

Data retention

Consent records are kept for the lifetime of the Bronto account.

If a contact is suppressed, it will be deleted as part of the suppression job. The deletion will be recorded in the consent log.
If a contact changes email address, Bronto will, for the same contact, record and display all email addresses associated to that contact.

If a contact is deleted, Bronto keeps the consent log. It will be accessible in the Site Consent Records export.

**Find Contacts Based On Contact Statuses**

The easiest and most efficient way to find contacts who have a particular status in your account is to create a segment. Create a segment has the added benefit of always staying up to date. You can return to the segment at anytime to view all the contacts in your account who have a particular status.

For more information contact status, see [Contact Status](#) on page 1083.

To create a segment containing contacts with a particular status:

1. Go to **Tables > Contacts > Segments**.
2. To
   - Create a new segment, click **Create New Segment**.
   - Edit an existing segment, click the pencil icon in the row associated with the segment you want to edit.
3. Click **Add Rule**.
   - If you want to add this criterion to an existing rule, skip this step.
4. Click **Add Criteria** if you want to add another criteria.
5. Click **Contacts**.
6. Click **Contact Status**.
7. In the first pull-down menu, select one of the following:
   - Is
   - Is Not
8. In the second pull-down menu, select one of the following:
   - **Active** - Contacts with a status of Active are contacts that can receive emails from you.
   - **Bounced** - Contacts with a status of Bounce cannot be sent emails because they have hard bounced due to a bad email address, or they have exceeded the bounce limit set for your account.
   - **Onboarding** - Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.
   - **Transactional** - Contacts with a status of Transactional can only be sent transactional emails. A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.
   - **Unconfirmed** - Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you in order for you to send to them.
   - **Unsubscribed** - Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.
9. Click **Save And Close**.

**Contact Details Page**

The Contact Details page contains detailed data and metrics recorded for a specific contact. When you click on the email address of a contact from the Search Contacts page, All Lists page, or Lists Overview page, you will be taken to the Contact Details page for that contact.

**Contact Details Overview**

The Contact Details overview page contains at-a-glance information about that contact.

**Contact Details General Information**

The General Information section on the Contact Details page allows you to view the following information about a contact:

### Tip:
To get to the Contact Details page for a contact, go to **Tables > Contacts > Search Contacts**, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>The date and time the contact was added.</td>
</tr>
<tr>
<td>Data</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Source</td>
<td>Indicates how the contact was added to your account. Contacts can be added via:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Manual addition (Bronto)</strong></td>
</tr>
<tr>
<td></td>
<td>If a contact source was provided when the contact was added, the contact source provided will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on manually creating contacts in the application, see Create An Individual Contact on page 1101.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Bulk import</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was imported as part of the import process in the application, the source provided on the first page of the import process will be shown here as well. For more information importing contacts into the application, see Contact Imports on page 1080.</td>
</tr>
<tr>
<td></td>
<td>If the contact was added via Direct Import, the value provided in the source parameter will be shown here as well. For more information on using Direct Import, see Direct Import on page 1115.</td>
</tr>
<tr>
<td></td>
<td>• <strong>API session</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was added via the API and a value for the customSource property was passed in, that value will be displayed. If the contact was added using the Data Loader, the text <strong>API session</strong> will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on adding contacts using the API, see the documentation on the updateDeliveries API call. For more information on using the Data Loader, see Data Loader.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Web page form sign-up (Name of the webform) (IP Address)</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was added via a webform, the name of the webform will be displayed, along with the IP address where the form was hosted.</td>
</tr>
<tr>
<td></td>
<td>Contacts added using Direct Add and Pop-up Manager will be displayed as web page form sign-ups. For more information on using Direct Add, see Direct Add on page 1102.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Salesforce import</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was imported as part of a Salesforce import, the contact source you provided on the first page of the Salesforce import process will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on importing contacts from Salesforce, see Import A Salesforce Report on page 1091.</td>
</tr>
<tr>
<td>Data</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Modified</td>
<td>The last date and time metrics or data pertaining to the contact were modified.</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Active</strong></td>
<td>Contacts with a status of Active are contacts that can receive emails from you.</td>
</tr>
<tr>
<td><strong>Onboarding</strong></td>
<td>Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.</td>
</tr>
<tr>
<td><strong>Transactional</strong></td>
<td>Contacts with a status of Transactional can only be sent transactional emails. A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices. For more information on Transactional Emails, see Transactional Emails on page 294.</td>
</tr>
<tr>
<td><strong>Unsubscribed</strong></td>
<td>Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.</td>
</tr>
<tr>
<td><strong>Bounce</strong></td>
<td>Contacts with a status of Bounce cannot be sent emails because they have hard bounced due to a bad email address, or they have exceeded the bounce limit set for your account.</td>
</tr>
<tr>
<td><strong>Unconfirmed</strong></td>
<td>Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you before you can segment them to the <strong>Included</strong> category. For more information on automated onboarding, see Automated Onboarding on page 1081.</td>
</tr>
</tbody>
</table>

**Tip:** For more information on automated onboarding, see Automated Onboarding on page 1081.

**Tip:** For more information on bounced messages, see Email Bounce on page 196.

**Tip:** For more information on Unconfirmed contacts, see Unconfirmed Contacts on page 30.
### Email Preference

The contact's email preference, either HTML or TEXT.

### Dynamic Preview

Displays enabled if Dynamic Preview has been enabled for the contact.

Dynamic Preview allows you to preview an email message or an SMS message as if you were a specific contact in your account.

For more information on enabling Dynamic Preview for a contact, see Create An Individual Contact on page 1101.

### Related Topics

- **Contact Imports** on page 1080
  
The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

- **updateDeliveries API**
- **Direct Add** on page 1102
  
  Direct Add allows you to add contacts to your account via pages on your website.

### Contact Details Message Counts

The **Message Counts** section on the **Contact Details** page allows you to view the following information about a contact:

**Tip:** To get to the Contact Details page for a contact, go to **Tables > Contacts > Search Contacts**, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

<table>
<thead>
<tr>
<th>Message Counts</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Emails Sent</strong></td>
<td>22 (0 Bounces)</td>
</tr>
<tr>
<td>1 Today</td>
<td></td>
</tr>
<tr>
<td>2 In the past week</td>
<td></td>
</tr>
<tr>
<td>4 In the past month</td>
<td></td>
</tr>
<tr>
<td><strong>SMS Sent</strong></td>
<td>5</td>
</tr>
<tr>
<td><strong>SMS Received</strong></td>
<td>3</td>
</tr>
</tbody>
</table>

### Data

<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
</table>
| Emails Sent     | Here you can view the following:  
|                 | • The total number of emails sent to the contact.  
|                 | • The total number of bounces recorded for the contact.  
|                 | **Tip:** For more information on bounces, see Email Bounce on page 196.  
|                 | • The total number of emails sent to the contact today.  
|                 | • The total number of emails sent to the contact in the past week.  
|                 | • The total number of emails sent to the contact in the past month.  
| SMS Sent        | The total number of SMS messages sent to the contact. |
SMS Received

The total number of SMS messages received from the contact.

**Related Topics**

[Email Bounce](#) on page 196

An email bounce is an automated message about a delivery failure.

**Contact Details Performance Metrics**

The Performance section on the Contact Details page allows you to view the following information about a contact:

> **Tip:** To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see <a href="#">Hide or Show Columns In A Table</a> on page 1568.</td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see <a href="#">Hide or Show Columns In A Table</a> on page 1568.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date a click was recorded for a contact. For more information on creating a segment based on the last date a click was recorded for a contact, see <a href="#">Create A Segment Based On The Last Date A Click Was Recorded For A Contact</a> on page 473.</td>
</tr>
<tr>
<td>Data</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date an open was recorded for a contact. For more information on creating a segment based on the last date an open was recorded for a contact, see Create A Segment Based On The Last Date An Open Was Recorded For A Contact on page 475.</td>
</tr>
<tr>
<td>Email Open Rate</td>
<td>The Email Open Rate represents the percentage of emails that were opened by the contact, as compared to the number of emails that were successfully delivered to the contact.</td>
</tr>
<tr>
<td>Email Click Rate</td>
<td>The Email Click Rate represents the number of clicks that were recorded for the contact, as compared to the number of opens recorded for the contact.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The Conversion Rate represents the percentage of conversions recorded for the contact, as compared to the number of clicks recorded for the contact.</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The Total Orders metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The Total Revenue metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
</tr>
</tbody>
</table>

**Warning:** The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

**Note:** You must have click tracking and conversion tracking enabled to view the click and conversion related metrics (Email Click Rate, Conversion Rate, Orders, and Total Revenue). For instructions on enabling these features, see Enable Click Through Link Tracking on page 1352 and Configure Order Settings on page 1154.

**Related Topics**
- Hide or Show Columns In A Table on page 1568
- You can hide table columns in order to only display the metrics you need.
- Configure Order Settings on page 1154
- Order settings define how order data is stored in Bronto.
- Data Retention Policy on page 1509
- Our Data Retention Policy outlines what data we maintain indefinitely and what data we periodically delete.
- Enable Click Through Link Tracking on page 1352
- Enabling Click Through Link Tracking allows you to see where people are clicking in your emails.
The **RFM Metrics** section on the **Contact Details** page allows you to view the following information about a contact:

**Tip:** To get to the Contact Details page for a contact, go to **Tables > Contacts > Search Contacts**, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Order</td>
<td>The First Order Date represents the date of the first order recorded for the contact.</td>
</tr>
<tr>
<td>Last Order</td>
<td>The Last Order Date represents the date of the most recent order recorded for the contact.</td>
</tr>
<tr>
<td>Last Order Total</td>
<td>The Last Order Total represents the amount of revenue recorded for the most recent order.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The <strong>Total Revenue</strong> metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The <strong>Total Orders</strong> metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.</td>
</tr>
<tr>
<td>Average Order Revenue</td>
<td>The Average Order Revenue metric represents the average amount of revenue recorded for the contact when they place an order.</td>
</tr>
</tbody>
</table>

**Tip:** For more information on creating segments based on RFM metrics, see **Create Segments Based On Contact RFM Metrics** on page 462.

**Tip:** You can dynamically add RFM data to messages using RFM data field tags. For more information on using RFM data field tags, see **RFM Field Tags** on page 152

**Related Topics**

**Create Segments Based On Contact RFM Metrics** on page 462

The **RFM Metrics** criterion allows you to create segments based on RFM (Recency, Frequency, Monetary) metrics associated with contacts.

**RFM Field Tags** on page 152

RFM data field tags allow you to dynamically add RFM data to the body of your message.

**Contact Browser, Email Client, and OS Data**

The **Technology** section on the **Contact Details** page allows you to view the following information about a contact:

**Tip:** To get to the Contact Details page for a contact, go to **Tables > Contacts > Search Contacts**, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.
<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Primary Browser**  | The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers. Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails.  
  **Tip:** You can create segments based on the primary browser data stored for contacts in your account. For more information on how to create segments based on primary browser data, see Create A Segment Based On The Browser Used By Contacts on page 487. |
| **Mobile Browser**   | The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact. Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser.  
  **Tip:** You can create segments based on the mobile browser data stored for contacts in your account. For more information on how to create segments based on mobile browser data, see Create A Segment Based On The Mobile Browser Used By Contacts on page 488. |
| **Primary Email Client** | The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients. Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client.  
  **Tip:** You can create segments based on the primary email client data stored for contacts in your account. For more information on how to create segments based on primary email client data, see Create A Segment Based On The Email Client Used By Contacts on page 488. |
**Data** | **Description**
--- | ---
**Mobile Email Client** | The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact. Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client.

Tip: You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see Create A Segment Based On The Mobile Email Client Used By Contacts on page 489.

**Operating System** | The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.) You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see Create A Segment Based On The Operating System Used By Contacts on page 486.

---

**Related Topics**

Technology Segment Criteria on page 486

**Contact Details Location (GeoIP) Data**

The GeoIP Details section on the Contact Details page allows you to view the following information about a contact:

Tip: To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

**GeoIP Details**

- **City**: Durham
- **State/Region**: NC
- **Zip**: 27701
- **Country**: United States
- **Country Code**: US
- **Time Zone**: America/New_York
<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
<td>The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields. You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see Create A Segment Based On What City Contacts Are Located In on page 479.</td>
</tr>
<tr>
<td>State</td>
<td>The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields. You can create segments based on GeoIP State/Region data stored in your account. For more information on how to create segments based on GeoIP State/Region data, see Create A Segment Based On What State Or Region Contacts Are Located In on page 482.</td>
</tr>
<tr>
<td>Zip</td>
<td>The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields. You can create segments based on GeoIP Postal/ZIP code data stored in your account. For more information on how to create segments based on GeoIP Postal/ZIP code data, see Create A Segment Based On What Postal/ZIP Code Contacts Are Located In on page 481.</td>
</tr>
</tbody>
</table>
### Data Description

<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Country</strong></td>
<td>The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields. You can create segments based on GeoIP Country data stored in your account. For more information on how to create segments based on GeoIP Country data, see Create A Segment Based On What Country Contacts Are Located In on page 480.</td>
</tr>
<tr>
<td><strong>Country Code</strong></td>
<td>The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas. You can create segments based on GeoIP Country Code data stored in your account. For more information on how to create segments based on GeoIP Country Code data, see Create A Segment Based On What Country Code Contacts Are Located In on page 479.</td>
</tr>
<tr>
<td><strong>Time Zone</strong></td>
<td>The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.</td>
</tr>
</tbody>
</table>

### Related Topics

- GeoIP Segment Criteria on page 479
  An introduction to GeoIP segment criteria.

### Contact Details Field Data

The **Fields** tab on the Contact Details page contains all of the field data associated with a contact.

**Tip:** To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.
Contact Details List Membership

The Lists tab on the Contact Details page contains all of the lists a contact is currently on. If you click on the list name, you will be taken to the List Overview page for that particular list.

Tip: To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

Contact Details SMS Keyword Subscriptions

The Lists and SMS Keywords tab on the Contact Details page allows to view which SMS keywords a contact is subscribed to.

Tip: To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.
SMS keywords are words or names used to distinguish SMS messages on a given short code. Your account will have one short code, but you could have many keywords. This allows you to have keywords for different types of content you want to provide. For example, you could have a keyword for a big sale you are having, and another keyword for mobile updates you provide. There are two types of SMS keywords:

- **Subscription** - Subscription based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.

- **Basic or Non Subscription** - Basic, or non-subscription based keywords, are meant for individual transactional interactions. With non-subscription based keywords, a recipient texts in to a keyword and a response is sent back. The interaction ends there. The recipient is not added to a list because they have not agreed to receive future marketing messages from you.

For more information on SMS keywords, see [Create SMS Keywords](#) on page 261.

**Related Topics**
[Create SMS Keywords](#) on page 261

You can create keywords that a contact can subscribe to in order to receive SMS and MMS messages that are tied to the keyword.

**Contact Details Order Data**

The **Orders** tab on the **Contact Details** page allows you to view the following information about a contact:

- **Tip:** To get to the Contact Details page for a contact, go to **Tables > Contacts > Search Contacts**, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

The gray bar at the top of the page contains the following metrics and data:

<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Order</td>
<td>The First Order Date represents the date of the first order recorded for the contact.</td>
</tr>
<tr>
<td>Last Order</td>
<td>The Last Order Date represents the date of the most recent order recorded for the contact.</td>
</tr>
<tr>
<td>Last Order Total</td>
<td>The Last Order Total represents the amount of revenue recorded for the most recent order.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The <strong>Total Revenue</strong> metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The <strong>Total Orders</strong> metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.</td>
</tr>
<tr>
<td>Average Order Revenue</td>
<td>The Average Order Revenue metric represents the average amount of revenue recorded for the contact when they place an order.</td>
</tr>
</tbody>
</table>
Tip: You can dynamically add RFM data to messages using RFM data field tags. For more information on using RFM data field tags, see RFM Field Tags on page 152

The table contains the following metrics and data:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order ID / SKU</td>
<td>The order ID represents the unique identifier for a particular order. SKU IDs represent the IDs for individual products that make up an order. Orders are not required to have SKU IDs associated with them. If the Order has one SKU ID associated with it, there will be a backslash between the order ID and the SKU ID, with the order ID appearing on the left. If the order contains more than one SKU ID, there will be an arrow to the left of the order ID that you can click to drill-down and view the SKU IDs for the order.</td>
<td>The order ID and SKU ID are the unique identifiers for orders and products. These IDs are often used to sync this data with another system.</td>
</tr>
<tr>
<td>Name</td>
<td>The name passed in for an order or product SKU. You are not required to pass in a name for orders or SKUs.</td>
<td>Passing in a name for an order and a SKU allows you to apply a human readable label to an order and a SKU.</td>
</tr>
<tr>
<td>Category</td>
<td>The category passed in for the order or product SKU. You are not required to pass in a category for orders or SKUs.</td>
<td>Passing in a category for orders and product SKUs allows you to group orders ans SKUs together using a human readable label.</td>
</tr>
<tr>
<td>Description</td>
<td>The description passed in for the order or product SKU. You are not required to pass in a description for orders or SKUs</td>
<td>Passing in a description for orders and product SKUs allows you to attach a human readable description that provides additional detail beyond name and category.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The total number of products purchased per order and SKU ID. For an order, the quantity represents the number of products purchased in the order. If there is only one product SKU ID for the order, the quantity will represent the total number times that specific product was purchased in the order. If the order contains multiple product SKU IDs, you can drill-down to each SKU ID to see the total number of products purchased for each SKU ID. If a contact purchases more than one of a specific product, you will see the number purchased and the unit price for the product. For example, 3 @ $10.00.</td>
<td>SKU IDs usually correspond to a product. In an order, if a contact purchases more than one of a given product, you can easily scroll down to the SKU ID to view how many of that particular product the contact purchased.</td>
</tr>
</tbody>
</table>
### Order Service: Contact Details Order Data

**Important:** This topic does not apply to you if you are not using the Order Service.

The Orders tab on the Contact Details page allows you to view the following information about a contact:

- **Tip:** To get to the Contact Details page for a contact, go to **Tables > Contacts > Search Contacts**, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

The gray bar at the top of the page contains the following metrics and data:

<table>
<thead>
<tr>
<th>Data</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Order</td>
<td>The First Order Date represents the date of the first order recorded for the contact.</td>
</tr>
<tr>
<td>Last Order</td>
<td>The Last Order Date represents the date of the most recent order recorded for the contact.</td>
</tr>
<tr>
<td>Last Order Total</td>
<td>The Last Order Total represents the amount of revenue recorded for the most recent order.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The <strong>Total Revenue</strong> metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The <strong>Total Orders</strong> metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.</td>
</tr>
<tr>
<td>Average Order Revenue</td>
<td>The Average Order Revenue metric represents the average amount of revenue recorded for the contact when they place an order.</td>
</tr>
</tbody>
</table>
Tip: You can dynamically add RFM data to messages using RFM data field tags. For more information on using RFM data field tags, see RFM Field Tags on page 152

The table contains the following metrics and data:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Id</td>
<td>The order ID represents the unique identifier for a particular order.</td>
<td>The order ID is the unique identifier for an order. This ID is often used to sync this data with another system.</td>
</tr>
<tr>
<td>Customer Order Id</td>
<td>The order Id given to the customer</td>
<td>N/A</td>
</tr>
<tr>
<td>Message</td>
<td>The name of the message the order is associated with.</td>
<td>N/A</td>
</tr>
<tr>
<td>Order Date</td>
<td>The date the order was placed.</td>
<td>N/A</td>
</tr>
<tr>
<td>Creation Date</td>
<td>The date and time the order was recorded.</td>
<td>N/A</td>
</tr>
<tr>
<td>Contact</td>
<td>The email address of the contact the order is associated with.</td>
<td>N/A</td>
</tr>
<tr>
<td>Tax Amount</td>
<td>The tax amount passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td>Discount Amount</td>
<td>The discount amount passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The subtotal passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td>Shipping Amount</td>
<td>The shipping amount passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td>Grand Total</td>
<td>The grand total passed in for the order.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Tip: For more information on passing orders into the application, see Configure Order Settings on page 1154.

Tip: For more information on creating segments based on order and RFM metrics, see Create A Segment Based On Order Data Stored For Contacts on page 460 and Create Segments Based On Contact RFM Metrics on page 462.

View Contact Details History

The History tab on the Contact Details page contains the history of events recorded for the contact. These events include messages sent to the contact, field updates, conversions, and being added or removed from a list or segment.

Conversions on the History tab represent each individual conversion made by the contact. You may notice a difference between the number of conversions shown here and the number of conversions displayed for the contact on the Search Contacts page. The reason for this is, on the Search Contacts page, the table is displaying the total
unique conversions. There can only be 1 unique conversion per message, but a contact could have made more than 1 individual conversion per message. Hence, the table on the Search Contacts page may show the contact as having 1 unique conversion, but the History tab shows the contact as having 2 individual conversions.

The Notes/Method column on the contact details page explains how the action was performed. This includes:

- Account/Manual: someone logged into your account performed the action using the Bronto platform. For example, a new custom field was created using the Contact Fields page.
- Administrator action: this action was completed by an automated Bronto process. For example, a nightly job was run that updated your account's suppressions list.
- API: the action was performed using an API call. For example, someone used the addContacts call to add a new contact. For more information see Bronto's API documentation.
- Direct update: a change was made using the direct update logic that was implemented for your account. For example, a contact's mobile number was updated after they visited a page on your website using an email you sent from Bronto. For more information see Direct Update on page 1110
- Workflow action: the action was completed by one of your account's workflows. This includes when a workflow changed a contact's field, sent a contact a message, or added or removed a contact from a list. If you click the word workflow, the workflow that performed the action is opened.

⚠️ Warning: The length of time we will keep historical data for a contact is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

To view a contact's history:

1. Go to Tables > Contacts > Search Contacts.
2. Search for your contacts.
   For more information about how to do this, see Search For Contacts In Your Account on page 896.
3. Click on the email address of a contact.
4. Click History.
5. You can use the following buttons to sort the grid by time frame:
   - Today - Filters the grid to show the events recorded for the current day.
   - Day - Filters the grid to show a single day of events.
   - Week - Filters the grid to show a single week of events.
   - Month - Filters the grid to show a single month of events.

   ⚠️ Tip: You can use the left and right arrows shown next to the Today button to move between days, weeks, or months (based on what you selected above). The current time frame shown is displayed next to the left and right arrows.

Edit A Contact's Info From The Contact Details Page

On the Contact Details page, you can edit a contact's information by clicking 📊 Edit.

⚠️ Tip: To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

Unsubscribe A Contact From The Contact Details Page
On the Contact Details page, you can unsubscribe a contact by clicking Unsubscribe. When you unsubscribe a contact, they will be given a status of Unsubscribed.

Note: Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.

Tip: To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

Export A Contact's Consent Records From The Contact Details Page

Note: To download consent records, you must have permission to create a contact.

On the Contact Details page, you can export the consent records for a contact by clicking Export Consent Records.

Tip: To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

1. Go to the Contact Details: Overview page for a contact.
2. Click Export Consent Records.
3. Check for a notification that your export is ready. The export will also appear at Report > Legacy Downloads in the Consent Records Export section.

Delete A Contact On The Contact Details Page

On the Contact Details page, you can delete a contact by clicking Delete. When you delete a contact, they are no longer visible in your account and will not receive any of your emails. A contact's data is typically deleted within 24 hours but it could take up to 15 days to fully remove all related data.

Tip: To get to the Contact Details page for a contact, go to Tables > Contacts > Search Contacts, search for your contacts, and then click on the email address of the contact you want to view data/metrics for.

View All The Contacts On A List

The All Contacts page for a list contains a table that allows you to view all of the contacts on a particular list. You can use the search box to quickly locate specific contacts on the list or sort the table by metrics and status. You can click on a contact's email address to view more detailed information them.

Warning: The length of time we will keep contact-level sent/opened/clicked/converted reporting data is subject to the data retention policy. For more information on the data retention policy, see Data Retention Policy on page 1509.

Note: GeoIP data is based on the mode (the value that appears most often) of non-mobile IP addresses recorded for a contact. GeoIP data is not stored for mobile clients because it is deemed unreliable.

To view all the contacts on a list:
1. Go to Tables > Contacts > Lists.
2. Click on the name of a list.
3. Click View Contacts.

Default Columns

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The email address stored for the contact.</td>
<td>An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Status (Email)</td>
<td>The current status of the contact.</td>
<td>Tip: For more information on each type of contact status, see Contact Status on page 1083. This indicates whether or not you can send marketing emails to them, and the level of engagement you have with them.</td>
</tr>
<tr>
<td>Created</td>
<td>The date the contact was created.</td>
<td></td>
</tr>
<tr>
<td>Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
<td>This date lets you keep track of whether or not contacts are still engaged with you.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate. The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Message Format (Email)</td>
<td>The email message format preferred by the contact (HTML or Text).</td>
<td>It is important to know which type of email message your contacts prefer to receive, as this can affect the design of your email messages. For example, you wouldn't want to send an email message with a lot of images to a contact who prefers text only emails.</td>
</tr>
</tbody>
</table>

Hidden Columns

The table below describes columns which are not shown by default.

Tip: For more information on showing additional columns, see Hide or Show Columns In A Table on page 1568.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| Mobile Number       | The mobile number stored for the contact.                                  | A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).  
Tip: You can create segments based on mobile numbers stored in your account. For more information on how to create segments based on mobile numbers, see Create A Segment Based On Contact Mobile Numbers on page 458. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>API ID</td>
<td>The contact's API ID.</td>
<td>This information is useful if you are searching for a specific contact based on their API ID.</td>
</tr>
<tr>
<td>Facebook</td>
<td>Whether or not the contact's Facebook account is connected.</td>
<td>A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Twitter</td>
<td>Whether or not a Twitter handle is stored for the contact.</td>
<td>Storing a person's Twitter handle opens up the possibility for another channel of communication.</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568. Tip: You can create segments based on the last date a delivery was sent to a contact. For more information on creating a segment based on the last date a delivery was sent to a contact, see Create A Segment Based On The Last Date A Delivery Was Sent To A Contact on page 477.</td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
<td>Note: This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568. Tip: You can create segments based on the last date a click was recorded for a contact. For more information on creating a segment based on the last date a click was recorded for a contact, see Create A Segment Based On The Last Date A Click Was Recorded For A Contact on page 473.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is hidden by default. For more information on showing and hiding columns, see Hide or Show Columns In A Table on page 1568.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the last date an open was recorded for a contact. For more information on creating a segment based on the last date an open was recorded for a contact, see Create A Segment Based On The Last Date An Open Was Recorded For A Contact on page 475.</td>
<td></td>
</tr>
<tr>
<td>Last Unsubscribe Date</td>
<td>The last time the contact unsubscribed from receiving marketing emails from you. If the contact is still unsubscribed, the Status column will display Unsubscribed for that contact.</td>
<td>Tip: You can create a segment based on the last date a contact unsubscribed. For more information on creating a segment based on the last date a contact unsubscribed, see Create A Segment Based On The Last Date A Contact Unsubscribed on page 455.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact. <strong>Tip:</strong> You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>First Order Date</td>
<td>The date of the first order recorded for the contact.</td>
<td>You can use the first order date to find out when a contact began placing orders with you. <strong>Tip:</strong> You can create segments based on the first order date stored for a contact. For more information on creating a segment based on the first order date recorded for a contact, see <a href="#">Create Segments Based On Contact RFM Metrics</a> on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Order Date</td>
<td>The date of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order date to find out the last time a contact placed an order with you. <strong>Tip:</strong> You can create segments based on the last order date stored for a contact. For more information on creating a segment based on the last order date recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Last Order Total</td>
<td>The total amount of the last (or most recent) order recorded for the contact.</td>
<td>You can use the last order total to find out the revenue from the last order placed by the contact. <strong>Tip:</strong> You can create segments based on the last order total stored for a contact. For more information on creating a segment based on the last order total recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Total Orders</td>
<td>The total number of orders recorded for the contact.</td>
<td>You can use the total orders number to find out how many orders a contact has placed with you. <strong>Tip:</strong> You can create segments based on the total orders stored for a contact. For more information on creating a segment based on the total orders recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>The total amount of revenue recorded for the contact.</td>
<td>You can use the total revenue metric to find out how much revenue has been recorded for a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the total revenue stored for a contact. For more information on creating a segment based on the total revenue recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td><strong>Average Order Value</strong></td>
<td>The average order value recorded for the contact.</td>
<td>You can use the average order value metric to find out the average revenue for orders made by a contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on the average order value stored for a contact. For more information on creating a segment based on the average order value recorded for a contact, see Create Segments Based On Contact RFM Metrics on page 462.</td>
</tr>
<tr>
<td><strong>GeoIP City</strong></td>
<td>The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.</td>
<td>Knowing the city of your contacts allows you to send targeted marketing communications based on City.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> You can create segments based on GeoIP City data stored in your account. For more information on how to create segments based on GeoIP City data, see Create A Segment Based On What City Contacts Are Located In on page 479.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>GeoIP State/Region</td>
<td>The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields.</td>
<td>Knowing the State/Region of your contacts allows you to send targeted marketing communications based on State/Region.</td>
</tr>
<tr>
<td>GeoIP Zip</td>
<td>The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields.</td>
<td>Knowing the Postal/ZIP code of your contacts allows you to send targeted marketing communications based on Postal/ZIP code.</td>
</tr>
<tr>
<td>GeoIP Country</td>
<td>The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields.</td>
<td>Knowing the country of your contacts allows you to send targeted marketing communications based on country.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| *GeoIP Country Code* | The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas. | Knowing the country code of your contacts allows you to send targeted marketing communications based on the country code stored for contacts in your account.  

**Tip:** You can create segments based on GeoIP Country Code data stored in your account. For more information on how to create segments based on GeoIP Country Code data, see [Create A Segment Based On What Country Code Contacts Are Located In](#) on page 479. |
| *GeoIP Time Zone*   | The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click. | Knowing the time zone of your contacts allows you to send targeted marketing communications based on the time zone stored for contacts in your account. |
| *Primary Browser*   | The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.                                                                 | Knowing which type of browser a contact is using can allow you to make browser specific design decisions in your emails.  

**Tip:** You can create segments based on the primary browser data stored for contacts in your account. For more information on how to create segments based on primary browser data, see [Create A Segment Based On The Browser Used By Contacts](#) on page 487. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| **Mobile Browser**  | The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact. | Knowing which type of mobile browser a contact is using can allow you to design decisions in your emails specific to a certain type of mobile browser.  
  **Tip:** You can create segments based on the mobile browser data stored for contacts in your account. For more information on how to create segments based on mobile browser data, see Create A Segment Based On The Mobile Browser Used By Contacts on page 488. |
| **Primary Email Client** | The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients. | Knowing which type of email client a contact is using can allow you to design decisions in your emails specific to a certain type of email client.  
  **Tip:** You can create segments based on the primary email client data stored for contacts in your account. For more information on how to create segments based on primary email client data, see Create A Segment Based On The Email Client Used By Contacts on page 488. |
| **Mobile Email Client** | The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact. | Knowing which type of mobile email client a contact is using can allow you to design decisions in your emails specific to a certain type of mobile email client.  
  **Tip:** You can create segments based on the mobile email client data stored for contacts in your account. For more information on how to create segments based on mobile email client data, see Create A Segment Based On The Mobile Email Client Used By Contacts on page 489. |
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td>The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.)</td>
<td>Knowing a contact’s operating system can allow you to target your messages based on the type of operating system a contact is using.</td>
</tr>
</tbody>
</table>

**Tip:** You can create segments based on the operating system data stored for contacts in your account. For more information on how to create segments based on operating system data, see *Create A Segment Based On The Operating System Used By Contacts* on page 486.

---

**Export Contact Data**

Export Contact reports allow you to export contact level data. These exports can help with list reconciliation, synchronization with your in-house CRM software, or other administrative tasks. You can include contact status, field data, GeoIP data, RFM metrics, and technology data in the export.

Note: All reports will download into a CSV file that you can open in MS Excel.

To begin exporting contact data:

1. Go to **Tables > Contacts > Manage**.
2. Click **Exports**.
3. In the **Choose Filter** section, choose the filter to use for the export. You can choose:
   - All Contacts
   - Active Contacts
   - Inactive Contacts
   - Suppression List

   When you select **All Contacts**, only active and inactive contacts are included in the export. Suppression list contacts are not included.
4. In the **Choose Fields** section, select the field data you want included in the report.
5. In the **Choose GeoIP / Technology Data** section, select the GeoIP and technology usage data you want included in the report.
   For more information about GeoIP see *Contact Details Location (GeoIP) Data* on page 920. For more information about Technology Data see *Contact Browser, Email Client, and OS Data* on page 918.
6. In the **Choose RFM Metrics** section, select the RFM metrics you want included in the report.
   For more information about RFM metrics see *Contact Details RFM Metrics* on page 917.
7. Optional: In the **Email Notification** section, add an email address that will be notified when the report is ready for download.
   You are also notified when the report is ready for download via an in-application notification.
8. Click **Export** to begin generating the report.

All reports will download into a CSV file that you can open in MS Excel.
Tip: You can directly import an export report back into the application without having to make any modifications to the export report. For more information on importing a .CSV file, see Contact Imports on page 1080.

Export Contact Reports From The Search Contacts Page

The Export link lets you export contacts based on contacts you searched for.

To export a report from the Search Contacts page:

1. Go to Tables > Contacts > Search Contacts.
2. Search for contacts.

Tip: For more information on the details of contact searching, see Search For Contacts In Your Account on page 896.

3. Click Export.

4. In the Choose Filter section, select the filter to use for the export using the Filter pull-down menu. You can choose:
   - Contacts Matching Search Results - Choosing this option will include all the contacts that match the search criteria you used on the Search Contacts page in the export.
     
     Tip: To change your search filters:
     
     a. Go to Tables > Contacts > Search Contacts.
     b. Update the search values.
     c. Click Search.
     d. Click Export.

     You will return to this page with your new search filters.

   - All Contacts
   - Active Contacts
   - Inactive Contacts

By default, the report will contain the following data for contacts included in the report:

Table 4: Included Contact Fields

<table>
<thead>
<tr>
<th>Contact Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>The email address stored for the contact. An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact. A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the contact.</td>
</tr>
<tr>
<td>Date Created</td>
<td>The date the contact was created.</td>
</tr>
</tbody>
</table>

Tip: For more information on each type of contact status, see Contact Status on page 1083.
<table>
<thead>
<tr>
<th>Contact Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Modified</td>
<td>The last time information or metrics pertaining to the contact were modified.</td>
</tr>
<tr>
<td>Contact Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Source</td>
<td>Indicates how the contact was added to your account. Contacts can be added via:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Manual addition (Bronto)</strong></td>
</tr>
<tr>
<td></td>
<td>If a contact source was provided when the contact was added, the contact source provided will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on manually creating contacts in the application, see <a href="#">Create An Individual Contact</a> on page 1101.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Bulk import</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was imported as part of the import process in the application, the source provided on the first page of the import process will be shown here as well. For more information importing contacts into the application, see <a href="#">Contact Imports</a> on page 1080.</td>
</tr>
<tr>
<td></td>
<td>If the contact was added via Direct Import, the value provided in the source parameter will be shown here as well. For more information on using Direct Import, see <a href="#">Direct Import</a> on page 1115.</td>
</tr>
<tr>
<td></td>
<td>• <strong>API session</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was added via the API and a value for the <code>customSource</code> property was passed in, that value will be displayed. If the contact was added using the Data Loader, the text <strong>API session</strong> will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on adding contacts using the API, see the documentation on the <code>updateDeliveries</code> API call. For more information on using the Data Loader, see <a href="#">Data Loader</a>.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Web page form sign-up (Name of the webform) (IP Address)</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was added via a webform, the name of the webform will be displayed, along with the IP address where the form was hosted.</td>
</tr>
<tr>
<td></td>
<td>Contacts added using Direct Add and Pop-up Manager will be displayed as web page form sign-ups. For more information on using Direct Add, see <a href="#">Direct Add</a> on page 1102.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Salesforce import</strong></td>
</tr>
<tr>
<td></td>
<td>If the contact was imported as part of a Salesforce import, the contact source you provided on the first page of the Salesforce import process will be displayed.</td>
</tr>
<tr>
<td></td>
<td>For more information on importing contacts from Salesforce, see <a href="#">Import A Salesforce Report</a> on page 1091.</td>
</tr>
<tr>
<td>Contact Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Source Detail/Custom Source</td>
<td>A source value for your contact that you define during a bulk import or the IP address of the contact when they submitted a webform.</td>
</tr>
<tr>
<td>Sent</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
</tr>
<tr>
<td>Opened</td>
<td>The total number of opens recorded for a contact.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
</tr>
<tr>
<td>Clicked</td>
<td>Clicked represents the unique clicks recorded for a contact. A unique click is recorded the first time a contact clicks any link contained in an email you send them.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO)</td>
</tr>
<tr>
<td>Conversions</td>
<td>Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper.</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>The Total Revenue metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
</tr>
<tr>
<td>Message Type Preference</td>
<td>Indicates whether a contact prefers to receive messages as text or HTML.</td>
</tr>
<tr>
<td>On Lists</td>
<td>Includes a list of contacts that the contact is on.</td>
</tr>
<tr>
<td>On Keywords</td>
<td>The SMS keyword(s) that a contact is subscribed to.</td>
</tr>
<tr>
<td>Last Delivery Date</td>
<td>The last date a delivery was sent to the contact.</td>
</tr>
<tr>
<td>Last Open Date</td>
<td>The last date an open was recorded for the contact.</td>
</tr>
<tr>
<td>Last Click Date</td>
<td>The last date a click was recorded for the contact.</td>
</tr>
<tr>
<td>Contact Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Unsubscribe Date</td>
<td>The last time the contact unsubscribed from receiving marketing emails from you.</td>
</tr>
<tr>
<td>Twitter Handle</td>
<td>The Twitter handle for a contact.</td>
</tr>
<tr>
<td>Facebook Username</td>
<td>The Facebook username for a contact.</td>
</tr>
</tbody>
</table>

Additional data can be included in the report using the settings described below:

**Note:** The date range selected above limits the report to contacts who had a particular status within the selected date range. It does not limit the data included for those contacts that you select in the **Choose Data To Be Included In The Report** section.

5. In the **Choose Fields** section, select the field data you want included in the report.

6. In the **Choose GeoIP / Technology Data** section, select the GeoIP and technology usage data you want included in the report.

   For more information about GeoIP see [Contact Details Location (GeoIP) Data](#) on page 920. For more information about Technology Data see [Contact Browser, Email Client, and OS Data](#) on page 918.

7. In the **Choose RFM Metrics** section, select the RFM metrics you want included in the report.

   For more information about RFM metrics see [Contact Details RFM Metrics](#) on page 917.

8. Optional: In the **Email Notification** section, add an email address that will be notified when the report is ready for download.

   You are also notified when the report is ready for download via an in-application notification.

9. Click **Export** to begin generating the report.

   All reports will download into a CSV file that you can open in MS Excel.

   **Note:** All reports will download into a CSV file that you can open in MS Excel.

   **Tip:** You can directly import an export report back into the application without having to make any modifications to the export report. For more information on importing a .CSV file, see [Contact Imports](#) on page 1080.

**Related Topics**

- [Contact Details Location (GeoIP) Data](#) on page 920
- [Contact Browser, Email Client, and OS Data](#) on page 918
- [Contact Details RFM Metrics](#) on page 917

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**View Email**

You can view all of the messages in your account, information about a single message, or preview what a message will look like to your contacts.

You can also view metrics for individual deliveries made using an email message, and view what delivery groups an email message has been added to. You can also schedule new deliveries, schedule test deliveries, and view reports.

**View All Emails In Your Account**

The **Messages** page allows you to view all of the emails in your account.

To view all the email messages in your account, go to **Messages > Messages** and then click **Email**.
This email sections of this page includes both information that can provide insight into your messages and actions you can perform. To view the complete details about an individual email, click on its name in the table.

**Email Actions**

Email actions can be accomplished by:

- Selecting an email row or rows and clicking one of the buttons on the table.
- Clicking one of the icons located in the column at the end of a row.
- Searching for a specific message by name or API ID using the pull-down menu next to the search box.

Buttons are actions that can be performed on more than one email. Email icons are actions than can only be performed on one email at a time. All of the buttons and actions are described in the following table:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Move</strong></td>
<td>When you select a message(s) and click <strong>Move</strong>, you can move the message or messages into a folder. By default, all emails are shown in the emails table. You can click on a message folder name in the side navigation to limit the emails displayed to a folder's contents. See <em>Use Folders To Organize Your Messages</em> on page 964 for more information about using message folders.</td>
</tr>
<tr>
<td><strong>Copy</strong></td>
<td>When you select a message(s) and click <strong>Copy</strong>, a duplicate of the message is created. The message will have all of the same content as the original message. It will not retain any of the original email's metrics because it is a new message.</td>
</tr>
<tr>
<td><strong>Add To Delivery Group</strong></td>
<td>When you select a message(s) and click <strong>Add To Delivery Group</strong>, you can add the message to an existing delivery group or create and add the message to a new delivery group. See <em>Delivery Groups</em> on page 577 for more information about delivery groups.</td>
</tr>
<tr>
<td><strong>View Comparison</strong></td>
<td>When you select a message(s) and click <strong>View Comparison</strong>, the Comparison Report page opens with the report for any messages you selected displayed.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>When you select a message(s) and click <strong>Delete</strong>, the message is deleted. Deleting a message also deletes all metrics and reports associated with deliveries made using the message. Any currently scheduled deliveries (Outgoing) associated with this message are not be stopped. See <em>Stop A Delivery</em> on page 319 for information about stopping a delivery.</td>
</tr>
</tbody>
</table>

| ![Preview Icon] | Click this icon to open a preview of a message. |
| ![Send Icon]   | Click this icon to schedule a message to send. See *Send Email* on page 279 for information about sending messages. |
| ![Report Icon] | Click this icon to open a message report. See *Message Reports (Legacy)* on page 682 for information about message reports. |

**Email Information**

The columns in the email messages table contain information about your message. The visibility of the columns are adjustable. If you click on the visible columns icon you will be able to show or hide information displayed in the table. The most commonly used columns described below:
<table>
<thead>
<tr>
<th>Columns Name</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The Message column displays the name of the message.</td>
<td>N/A</td>
</tr>
<tr>
<td>API ID</td>
<td>The contact's API ID.</td>
<td>This information is useful if you are searching for a specific contact based on their API ID.</td>
</tr>
<tr>
<td>Last Edited</td>
<td>The last edited column shows the date the last time the email message was edited or used in a delivery.</td>
<td>N/A</td>
</tr>
<tr>
<td>Sent (email)</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Delivered (email)</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Delivery Rate (email)</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Columns Name</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Opens (email)</td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Open Rate (email)</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Total Opens</td>
<td>The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric. Note: The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see Opens Metric on page 882.</td>
<td>The total opens metric, similar to opens, is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Columns Name</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Clicks (email)</td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through</td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Click Rate (email)</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Total Clicks</td>
<td>The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe • clicks link A 10 times • and clicks link B 5 times And Taylor Doe • clicks link B 5 times Then 20 total clicks are recorded.</td>
<td>The total clicks metric, similar to clicks, is important because it represents a level of contact engagement beyond just opens and begins to highlight the effectiveness of your message content. Where as with clicks your are able to determine that contacts were interested in the content of your message, total clicks allows you to get some idea of the frequency of that interest.</td>
</tr>
<tr>
<td>Columns Name</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Click Through Rate</strong></td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link. <strong>Tip:</strong> The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858.</td>
</tr>
<tr>
<td><strong>Conversions (email)</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Columns Name</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate (email)</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Conversion/Delivered Rate</td>
<td>The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.</td>
<td>The conversion/delivered rate is important because it gives you an overall indication of the contacts who received your message and were also engaged enough to convert. Whether it's making a purchase or downloading a whitepaper, the ultimate goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Revenue Per Email</td>
<td>The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The Revenue Per Email metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
</tbody>
</table>

**Tip:** The conversion/delivered rate is a legacy calculation. For a more useful calculation, we suggest you view the conversion rate. The conversion rate is determined by the number of conversions over the number of clicks. For more information on the conversion rate, see [Conversion Rate Metric](#) on page 864.
<table>
<thead>
<tr>
<th>Columns Name</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Deliveries</td>
<td>The total deliveries column indicates the total number of deliveries made using the message. This number excludes test email deliveries.  Note: Accounts that have a large number of deliveries do not see this column in order to avoid page loading issues.</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Test Deliveries</td>
<td>The total test deliveries column indicates the total number of test email deliveries made using the message. Note: Accounts that have a large number of deliveries do not see this column in order to avoid page loading issues.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Related Topics**

[Report Metrics](#) on page 854  
This section of documentation lists each individual report metric in Bronto with granular details about every metric.

**Email Overview Page**

The [Email Overview](#) page provides the ability to work with your message, including editing and scheduling, and offers a view of the high-level metrics for an email message.

The page is divided into several areas.

**Banner**

The banner contains buttons that can be used to perform different actions related to the message.

**Email Message: Doc  Rename**

The options are described in following table:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rename</td>
<td>Allows you to quickly change the name of the message. This is not the subject line for the message. The quick edit option for the subject line can be found in the preview and edit area.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the email in the message editor that was used to create the message.</td>
</tr>
<tr>
<td>Web Preview</td>
<td>Opens a preview of the message in a browser.</td>
</tr>
<tr>
<td>Folder</td>
<td>Takes you to the containing folder of the message.</td>
</tr>
<tr>
<td>Compare</td>
<td>When you click Compare, the Comparison Report page opens with the report the message displayed.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Copy</td>
<td>When you click <strong>Copy</strong>, a duplicate of the message is created. The message will have all of the same content as the original message. It will not retain any of the original email's metrics because it is a new message.</td>
</tr>
<tr>
<td>Delete</td>
<td>Clicking <strong>Delete</strong> will delete the message. Deleting a message also deletes all metrics and reports associated with deliveries made using the message. Any currently scheduled deliveries (Outgoing) associated with this message are not be stopped. See <strong>Stop A Delivery</strong> on page 319 for information about stopping a delivery.</td>
</tr>
</tbody>
</table>

### Schedule

The schedule area is how you open the page that lets you schedule an email to send.

![Schedule Delivery](image)

There are three types of sends:

- **Test** lets you send a test message before you send the email to your contacts. We highly recommend testing messages before you send them. For more information see **Test Email** on page 319.
- **Regular** is how you send messages. Bronto refers to sending messages as scheduling because you have a few options when you send your message beyond just sending it right away. For more information about scheduling see **Send Email** on page 279.
- **A/B Split** schedules a comparison test of messages. Different versions of a message, or different messages, can be sent to groups of contacts to see which has a higher engagement rate. For the specifics of how this works see **A/B Split Tests** on page 321.

### Overview Metrics

Overview metrics provide a quick look at the performance of this email. You can click **View Full Message Report** to view detailed email metrics. For more information see **Message Reports (Legacy)** on page 682.

![Overview Metrics](image)

Each metric is described below:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Note: Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

© Oracle 2018 | 953
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------</td>
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<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Opens</td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Clicks</td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through</td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>

**Associated Delivery Groups**

This section lets you see all of the delivery groups associated with the email.
You can click the icon associated with a delivery group to view the delivery group report or click Add To Delivery Group to add the email to a delivery group.

**Deliveries Of This Message**

The Deliveries Of This Message section lets you see all of the deliveries associated with a particular email message.

The metrics shown in this table are described below:
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| Delivery Type| The delivery Type represents the type of send. Each type is described below:  
  • *Normal* - The *Normal* email delivery type represents a regular email delivery sent to more than one contact.  
  • *Bulk* - The *Bulk* email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.  
  • *Skipped* - The *Skipped* email delivery type represents email messages that were skipped by Bronto and not sent.  
  • *Single Contact* - The *Single Contact* email delivery type represents emails delivered to only a single contact. Email deliveries sent via workflows are always marked as *Single Contact*, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.  
  • *Test* - The *Test* email delivery type represents email deliveries that were sent as test deliveries.  
  • *AMR* - The *AMR* email delivery type represents email deliveries that were sent via an *Automated Message Rule*.  
  • *Split Group* - The *Split Group* email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.  
  • *FTAF* - The *Forwards to a Friend* email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.  
  • *Transactional* - The *Transactional* email delivery type represents email deliveries that were sent as transactional emails. Note: A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices. Note: Transactional deliveries are hidden by default. For information on how to show them, see View Transactional Email Deliveries on page 1014. | N/A                                                                          |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Status**  | The Status column indicates the state of the delivery or post. Each status is described below:  
  • *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  • *Partially Sent*  
  • *Canceled*  
  • *Successful* | N/A |
<p>| <strong>Recipients</strong> | The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column. | N/A |</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| Send Date   | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  - 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  - 🕒 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |
| Sent        | The emails sent metric represents the total number of emails that were sent.  
  Note: Deleted email deliveries will still be counted as part of the emails sent metric. | The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered. |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
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</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
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</tr>
<tr>
<td>Email Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>
| Contact Loss Rate (email)    | The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.  
  **Tip:** For more information on the inactive status type, see Contact Status on page 1083  
  | The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts. |

**Previews And Editing**

The preview and editing area gives you quick access to preview different versions of a message, edit those versions, request transactional approval, and edit the subject line of a message. If you have enabled Campaigns you also have the option to add a message to a campaign or change the campaign the message is associated with.
Not all messages will have different versions. But if your message does, you can click the options in this area to preview or edit these versions. This also provides a quick way to edit the email's subject line, assign it to a campaign, or move it to a different folder.

**Restore A Deleted Message**
When a message is deleted, it will be stored in the trash can.

You can click the **Trash Can** link to view all of your deleted messages.

You may restore messages that you have deleted from your account for up to 30 days. Messages remaining in the Trash Can for more than 30 days are automatically removed.

To restore a deleted message:

1. Go to **Messages > Dashboard**.
2. Click **Trash Can**.
3. Click the checkbox next to the message(s) you wish to restore.
4. Click **Restore Message**.
Use Folders To Organize Your Messages
By default, all the messages you create are housed in the Messages folder but you can create additional folders in order to organize your messages.

You can view the contents of the Messages folder by going to Messages > Messages and then clicking on the Messages folder. You can

- Create sub folders within the messages folder.
- Click on the name of a folder to view its contents.
- Move messages between folders.
- Move folders.
- Delete folders.

To create a new folder:

1. Click Messages > Messages.
2. Click the Messages folder, located on the left side of the page.
3. To create a new folder:
   a) Optional: If you want to place this folder inside of another folder, click on the folder name.
   b) Click Create New Folder.
   c) Enter the folder name in the Name box.
   d) Click Save.
4. To move a message:
   a) In the messages table, click the checkbox(es) associated with the message(s) you want to move.
   b) Click Move.
   c) Select the folder you want to move the message(s) to from the list.
   d) Click Move.
5. To move a folder:
6. To rename a folder:
   a) Click on the folder you want to rename.
   b) Click Rename Folder.
   c) Enter the new folder name in the Name box.
   d) Click Save.

7. To delete a folder:
   a) Click on the folder you want to delete.
   b) Move any messages within the folder out of the folder.
      A folder can only be deleted when it is empty.
   c) Click Delete Folder.
   d) Click Delete to delete the folder.

**View Auto-Saved Versions Of Messages**
Messages that you are editing will be auto-saved to the Drafts folder every minute.
If you forget to save a message or your computer crashes, you will still be able to access the version of the message you were working on. The Drafts folder is automatically created for you.

Draft messages automatically created by the application will appear in the Drafts folder without a checkbox next to their name. They cannot be moved, copied, added to delivery groups, added to comparison reports, or deleted. If you move non-draft message into the Drafts folder, a checkbox will appear next to the message name and you will be able to perform actions on the messages.
A draft of the message will continue to be saved each minute, until you stop editing the message and click **Save and Close**. When you click **Save and Close**, the draft will be removed from the drafts folder because the most recent version of the message will be the one you recently saved yourself. If you start editing the message again, an auto-saved version of the message will once again be saved to the drafts folder every minute. If you attempt to edit a message and a draft version exists, you will be asked if you want to edit the last manually saved version of the message, or the draft version of the message.

**View An Email Report**

Email message reports provide you with data about the performance of an email message.

For more information on email message reports, see **Message Reports (Legacy)** on page 682.

To view a report for an email message:

1. Go to **Messages > Messages**.
2. Click on the name of an email message.
3. Click **View Full Message Report**.

The Message Report is displayed.
4. Click a tab at the top of the report to view the different sections of the report. For example, click **Deliverability** to view the detailed deliverability metrics. For more information about report sections, see **Report Sections (Legacy Reports)** on page 702.

5. To filter the report by a date range:
   a) Click the calendar icon.
   
   The calendar icon is to the right of the last report section tab.
   
   b) Select a date filter from the list of available filters.
   
   If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.
   
   When you filter a report by a date range, report metrics in gray bars and graphs may vary from the metrics in report grids because these datasets are collected differently. Metrics provided in bars and graphs are based on the event date. Metrics provided in report grids, like the grid on the Clicks tab, are based on the delivery date.
   
   c) To use a custom date range, click **Custom** and add a start and an end date in the date boxes.
d) To remove the filter, click the calendar icon and then click on All Time.

6. To refine the metrics that are displayed to a single delivery of the message:
   a) Click the value shown next to Show Metrics For:
   b) Click on the relevant delivery in the list of deliveries.

   The delivery report for that delivery is displayed. For more information about delivery reports, see Delivery Reports (Legacy) on page 684.

You can also:
   • Download A Summary of Detailed Contact Report on page 821
   • Add Contacts From A Report To A List on page 853
   • View A Comparison Report From A Message Report (Legacy) on page 684
   • View A Report For A Specific Delivery Made Using A Message (Legacy) on page 683
   • Print a report by clicking the Print button.

View A Comparison Report From The All Messages Page
You can add messages to comparison reports from the Messages page.

You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

To add an item to comparison report:

Tip: For more information on comparison reports, see Comparison Reports on page 756.

1. Go to Messages > Messages.
2. Click on the message category you would like to add.
   For example, click Email to add email messages.
3. Click the checkboxes next to the messages you want to compare.
   You can compare a total of six messages.
4. Click View Comparison.
   The comparison report is displayed.
5. Provided you have less than six items added to the comparison report, you can add additional items to compare by clicking
   • Add Delivery
   • Add Message
   • Add Automated Message
   • Add Delivery Group

Preview Email While Editing

When creating or editing an email, you can click the Preview button to preview the email in desktop and mobile layouts.

You can preview emails in desktop and mobile format in both the email message editor and the HTML/WYSIWYG editor. To preview what the email will look like in real email clients (like Gmail, Hotmail, etc.), you can purchase the Previewer app. For more information see Previewer on page 971.
1. Go to the **Edit Message** page by creating a new email message or by editing an existing email.

2. Click the:
   - **Preview** button in the email message editor.
   - **Show Preview** button in the WYSIWYG editor.

3. Optional: You can preview the email in different layouts:
   - In the email message editor, click the **Desktop** or **Mobile** labels to switch between layouts.
   - In the WYSIWYG editor, select a format from the list in the upper-right corner.

---

**Preview Field And Special Tags In Emails With Dynamic Preview**

Dynamic Preview allows you to preview an email as if you were a contact in your account.

Dynamic Preview is enabled on an individual contact basis. Once it is enabled for a contact, you can select the contact from a list when you preview messages. This allows you to view a message exactly how a contact will see it. It's especially useful for validating the message tags and/or dynamic content in your message. For example, if you use the field tag for first name and the contact's first name is not shown in the dynamic preview, you know there is an issue with either your message tag or with the first name contact field.

**Tip:** For more information on using field tags and special tags, see **Message Tags** on page 149. For more information on using dynamic content, see **Dynamic Content** on page 180.

To enable Dynamic Preview for a contact:

1. Go to **Tables > Contacts > Search Contacts**.
2. Search for the contact.
   - For more information about how to do this, see **Search For Contacts In Your Account** on page 896.
3. Click on the contact's email address.
   - The **Contact Details** page is displayed.
4. Click **Edit**.
   - The **Edit Contact** page is displayed.
5. Click the **Enable this contact for use in dynamic preview testing** checkbox.

---
6. Click **Save**.

To view a Dynamic Preview of an email message:

7. Go to the **Edit Message** page by creating a new email message or by editing an existing email.

8. Click the:
   - **Preview** button in the email message editor.
   - **Show Preview** button in the WYSIWYG editor.

9. Select a contact from the:
   - **Preview for contact** list in the email message editor.
   - **Select a contact to view a preview for** list in the WYSIWYG editor.

You can only select contacts who have been enabled for Dynamic Preview.

10. Verify the content in the message is appropriate for that contact.

**View A Text Version Of An Email**

The **Text Version** option lets you view and edit the text version of your email messages.

To view the text version of an email:

- In the email message editor, click the **Toggle Text Version** button.

- In the HTML or WYSIWYG editor, click the **Text Version** tab.

By default, the text version of an email message only contains a disclaimer and a link to a web version of the email message. To bring over the text content from the HTML version of the email message, click:

- **Generate from HTML version** button in the email message editor. You can use the **Header** and **Footer** menus to add a header or footer to the text version view.

- **Re-generate from HTML version** button in the WYSIWYG editor. You can add files you have saved in the file manager by clicking the **File Manager** button, or add special tags and field tags using the **Insert Special Tags** and **Insert Field Tags** menus. You can delete the text version of the email message by clicking the **Delete the text version of this message** button. For more information on using the file manager, see **Upload Files To Bronto** on page 1161. For more information on using field tags and special tags, see **Message Tags** on page 149.

**Note:** We will automatically shorten all links automatically added to the plain text version of email messages by the application. These links include the view web version, view HTML version, and unsubscribe links. We still track clicks for these shortened URLs. These links will be shortened when the email message is sent, so if you preview the message, the links will not appear shortened. If you want to view what the shortened links will look like in your email message, we suggest you send some test email messages. For more information on sending test email messages, see **Message Testing Program**.

**Enable Or Disable Images In HTML Preview Of An Email**
Many ISPs will disable images in emails by default. Because of this, it is important that you know what your email message looks like with images turned off.

**Tip:** For more information on best practices for incorporating images into email, see Good HTML Email Design on page 201.

To enable/disable images in the HTML preview of an email message:

1. Go to Messages > Messages.
2. Click on the name of an email message.
3. Click the thumbnail preview image.
4. Click the Enable Images and Disable Images links to see what your message looks like with images turned off.
5. Click Cancel to close the preview.

### Previewer

The Previewer app allows you to preview your message in a variety of situations including different email clients (inboxes), web browsers, and mobile devices. Previewer also spam tests the message and tests its links and images.

**Important:** Previewer is a purchased app. To buy the Previewer app, contact your account representative.

After you have purchased Previewer, you can access the app by going to Messages > Messages, clicking on a message, then clicking the Previewer button.

After you click the button on the Email Overview page, the Previewer app opens.
Once the app is open, click **Run Test** on the **Overview** page to use the app. The **Run Test** button kicks off the process that:

- creates the message previews
- performs a spam audit of the message
- tests the message's links and images for validity

The Previewer app automatically displays the preview and test results in a matter of minutes.

Your account is allotted a specific number of tests per month (default is 100) and each time you **Run Test** it is counted against that allotment. You can see the number of tests your account has and the number of tests you have used in the bottom-left corner of the page.

The functionality of Previewer is divided into four areas.
Renderings

Renderings are where you can access the previews of a message. Message previews are divided into:

- Desktop: Includes previews of what your message looks like in different desktop email clients, like Outlook. Desktop also includes plain text and color blindness previews.
- Web: Includes previews of what your message looks like in commonly used web browsers.
- Mobile: Includes previews of what your message looks like on all of the most popular mobile devices.

When you click on a rendering, a preview of your message as it would look in that client, browser, or device is shown in a new window. This gives you the opportunity to make sure your contacts receive a useful and well-formatted message from you, no matter how they access it.

Note: When a message includes dynamic content or tags the preview of the message does not replace the dynamic code or tags with content.

Spam Audit

Spam Audit tests your message for issues that will frequently send your message to a spam folder. This includes things like testing your message ID for patterns that are frequently used in spam. When Spam Audit detects a problem a message that describes the issue is displayed.

Link Audit

Link Audit checks the links in the message to make sure each link is valid and properly formatted. When it detects a link is bad, the link is given an Invalid status. If there is a formatting issue, a message that explains the issue is displayed.

Image Audit

Image Audit checks that the images in your message are properly formatted. Image Audit expects images to be less than 30 K.

Use Previewer to Preview Messages

Renderings allows you to access a preview of what your message looks like to your contacts.

Important: Previewer is a purchased app. To buy the Previewer app, contact your account representative.

You can use Previewer to see what your message looks like to your contacts when they open it in a variety of situations.

(renderings image)

To use Previewer to preview a message:

1. Optional: If you would like to see a preview for a specific contact, enable dynamic preview for that contact:
   Using a specific contact allows Previewer to test message tags by replacing them with the details for that contact.
a) Find your contact using the Search Contacts page.

For more information about how to do this, see Search For Contacts In Your Account on page 896.
b) Click on the contact's email address.
c) Click Edit.
d) Click the Enable this contact for use in dynamic preview testing checkbox.
e) Click Save.

The contact is now available in the Previewer Preview As list.

2. Go to Messages > Messages.
3. Click on the name of an email message.
4. Click the Previewer button.

The Previewer app opens.

5. Optional: To run a test for a specific contact select the contact from the Preview As list.

Only contacts you have enabled for use in dynamic preview testing appear in this list. Follow the steps in step 1 to add a contact to this list.

6. Click Run Test on the Overview page.

   Note: If you have already run a test for this message, you do not need to run the test again unless you've made changes to the message.

   Previewer tests your message and displays the results of the test on the Renderings, Spam Audit, Link Audit, and Image Audit pages. Each test you run is counted against your monthly allocation.

7. Click Renderings.

   All of the available previews are displayed. This may take a couple of minutes.

8. Click on a preview to view it.

   The preview is displayed with all of the images in the email included.

9. Optional: To

   • Preview what the email looks like with blocked images, click Full Page View Block Images.

   • Zoom in or out on the rendering, move the bar between the + and -.

   • Scroll vertically through a Mobile preview, click the up or down arrows.

   • View the next or previous preview, click the preview name.

Not all previews have all of these options.
10. To return to the list of previews, click **Renderings**.

**Related Topics**

- [Search For Contacts In Your Account](#) on page 896

**Use Previewer to Spam Test Messages**

Spam Audit tests your message for issues that frequently send messages to a spam folder.

**Important:** Previewer is a purchased app. To buy the Previewer app, contact your account representative.

You can use Previewer to spam test a message before you send it.

![Audits / Spam](#)

<table>
<thead>
<tr>
<th>Service</th>
<th>Status</th>
<th>Issues Found</th>
</tr>
</thead>
<tbody>
<tr>
<td>AOL Mail</td>
<td>Passed</td>
<td></td>
</tr>
<tr>
<td>Gmail</td>
<td>Passed</td>
<td></td>
</tr>
<tr>
<td>GMX</td>
<td>Passed</td>
<td></td>
</tr>
<tr>
<td>Mail.com</td>
<td>Passed</td>
<td></td>
</tr>
<tr>
<td>Outlook</td>
<td>Passed</td>
<td></td>
</tr>
<tr>
<td>Yahoo! Mail</td>
<td>Passed</td>
<td></td>
</tr>
<tr>
<td>Berrocool</td>
<td>Passed</td>
<td>3</td>
</tr>
</tbody>
</table>

- Your email contains HTML content. This won't usually cause you to fail any spam filters.
- Your message contains content in both HTML and plain text.
- Your Message-ID has a pattern used in spam.

**DKIM**

<table>
<thead>
<tr>
<th>Status</th>
<th>Issues Found</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passed</td>
<td></td>
</tr>
</tbody>
</table>

Passing the spam test does not necessarily mean that your message will not end up in a contact's Bulk folder. There are many factors that play into this calculation at different ISPs. For example, a contact may have set up personal spam filters that we cannot predict or remedy. To increase your odds of avoiding the Bulk or Spam folder, make sure to use [Email Best Practices](#) when composing and sending messages.

To use Previewer to spam test a message:

1. Optional: If you would like to see a preview for a specific contact, enable dynamic preview for that contact:
   - Using a specific contact allows Previewer to test message tags by replacing them with the details for that contact.
     a) Find your contact using the Search Contacts page.
     b) Click on the contact's email address.
     c) Click **Edit**.
     d) Click the **Enable this contact for use in dynamic preview testing** checkbox.
     e) Click **Save**.
   
   The contact is now available in the Previewer **Preview As** list.

2. Go to **Messages > Messages**.

3. Click on the name of an email message.

4. Click the **Previewer** button.
The Previewer app opens.

5. Optional: To run a test for a specific contact select the contact from the **Preview As** list.

   Only contacts you have enabled for use in dynamic preview testing appear in this list. Follow the steps in step 1 to add a contact to this list.

6. Click **Run Test** on the **Overview** page.

   Note: If you have already run a test for this message, you do not need to run the test again unless you've made changes to the message.

   Previewer tests your message and displays the results of the test on the **Renderings**, **Spam Audit**, **Link Audit**, and **Image Audit** pages. Each test you run is counted against your monthly allocation.

7. Click **Spam Audit**.

   The results of the spam audit are displayed.

8. If the **Issues Found** column has a number in it, mouse over the number to see the issues for that service.

   A pop up with a list of the issues is displayed.

**Use Previewer to Audit Message Links**

Link Audit lets you test the links in your message.

Important: Previewer is a purchased app. To buy the Previewer app, contact your account representative.

You can use Previewer to test links in your messages to ensure the links are valid and well formatted.

<table>
<thead>
<tr>
<th>URL</th>
<th>Status</th>
<th>Valid</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.google.com">http://www.google.com</a></td>
<td>Good</td>
<td>Yes</td>
<td>None</td>
</tr>
</tbody>
</table>

To use Previewer to test message links:

1. Optional: If you would like to see a preview for a specific contact, enable dynamic preview for that contact:

   Using a specific contact allows Previewer to test message tags by replacing them with the details for that contact.

   a) Find your contact using the Search Contacts page.

      For more information about how to do this, see **Search For Contacts In Your Account** on page 896.

   b) Click on the contact's email address.

   c) Click **Edit**.

   d) Click the **Enable this contact for use in dynamic preview testing** checkbox.

   e) Click **Save**.

      The contact is now available in the Previewer **Preview As** list.

2. Go to **Messages > Messages**.

3. Click on the name of an email message.

4. Click the **Previewer** button.

   The Previewer app opens.

5. Optional: To run a test for a specific contact select the contact from the **Preview As** list.
Only contacts you have enabled for use in dynamic preview testing appear in this list. Follow the steps in step 1 to add a contact to this list.

6. Click Run Test on the Overview page.

   Note: If you have already run a test for this message, you do not need to run the test again unless you've made changes to the message.

Previewer tests your message and displays the results of the test on the Renderings, Spam Audit, Link Audit, and Image Audit pages. Each test you run is counted against your monthly allocation.

7. Click Link Audit.

   The results of the link audit are displayed. Links are either Valid or Invalid. If a link is Invalid it will not work. A Valid link can have recommendations associated with it. For example, the link could be missing Alt text.

Use Previewer to Audit Message Images

Image Audit lets you test the images in your message.

Important: Previewer is a purchased app. To buy the Previewer app, contact your account representative.

You can use Previewer to test images in your messages to ensure the images are well formatted.

To use Previewer to test message images:

1. Optional: If you would like to see a preview for a specific contact, enable dynamic preview for that contact:
   Using a specific contact allows Previewer to test message tags by replacing them with the details for that contact.
   a) Find your contact using the Search Contacts page.
      For more information about how to do this, see Search For Contacts In Your Account on page 896.
   b) Click on the contact's email address.
   c) Click Edit.
   d) Click the Enable this contact for use in dynamic preview testing checkbox.
   e) Click Save.

      The contact is now available in the Previewer Preview As list.

2. Go to Messages > Messages.
3. Click on the name of an email message.
4. Click the Previewer button.

   The Previewer app opens.

5. Optional: To run a test for a specific contact select the contact from the Preview As list.
Only contacts you have enabled for use in dynamic preview testing appear in this list. Follow the steps in step 1 to add a contact to this list.

6. Click **Run Test** on the **Overview** page.

   **Note:** If you have already run a test for this message, you do not need to run the test again unless you've made changes to the message.

   Previewer tests your message and displays the results of the test on the **Renderings, Spam Audit, Link Audit,** and **Image Audit** pages. Each test you run is counted against your monthly allocation.

7. Click **Image Audit**.

   The results of the image audit are displayed. Images are either **Valid** or **Invalid**. If an image is **Invalid** it will not display properly in your message. **Valid** or **Invalid** images can have recommendation messages. For example, if image is missing Alt text, then the image audit will recommend you add it.

**View Twitter**

The **Twitter Message Overview** page allows you to view a preview of an individual Twitter message, schedule new posts, view metrics for the Twitter message, view metrics for individual posts made using the Twitter message, and view what delivery groups the Twitter message has been added to.

**Related Topics**

- **Post Twitter** on page 337
- **Create Twitter** on page 250
- **Set Up Your Account So You Can Post To Twitter** on page 1285

Integrating your account with a Twitter account allows you to post to Twitter.

**View All The Twitter Messages In Your Account**

To view all the Twitter messages in your account, go to **Messages > Messages** then click **Twitter**.

![Twitter Message Overview](image)

**Tip:** You can move, copy, and delete a twitter message by using the **Move, Copy, and Delete** buttons.

**Tip:** You can send Twitter messages from the Twitter Messages page by clicking the Send Message icon.

Each of the columns in the Twitter messages table is described below:

<table>
<thead>
<tr>
<th>Columns Name</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The Message column displays the name of the message.</td>
<td>N/A</td>
</tr>
<tr>
<td>Last Edited</td>
<td>The last edited column shows the date the last time the Twitter message was edited or used in a post.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td><strong>Total Posts</strong></td>
<td>The total posts column indicates the total number of posts made using the Twitter message.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Message Name</strong></td>
<td>The Message Name column displays the name of the Twitter message.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The Status column indicates the state of the delivery or post. Each status is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• Skipped - The Skipped status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Partially Sent</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Canceled</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Successful</td>
<td></td>
</tr>
<tr>
<td><strong>Replies (Twitter)</strong></td>
<td>The Twitter replies metric represents the total number of times users on Twitter replied to a post you made to Twitter. A Twitter user can choose to reply directly to your account via a Twitter post they receive from you by clicking Reply in Twitter.</td>
<td>The Twitter replies metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter replies, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to reply to a post.</td>
</tr>
<tr>
<td>Metric/Data (Twitter)</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Retweets (Twitter)</td>
<td>The Twitter retweets metric represents the total number of times a Twitter post is retweeted. When a message is posted to Twitter, Twitter users can retweet the post and share it with all of their followers.</td>
<td>The Twitter retweets metric is important because it represents a level of engagement with users on Twitter. If a user on Twitter retweets a Twitter message you posted, this generally means they were interested enough in the content of the post to share it with all of their Twitter followers. Retweets have the potential to expose your Twitter posts to a very large audience in a very short period of time.</td>
</tr>
<tr>
<td>Clicks (Twitter)</td>
<td>The Twitter clicks metric represents the total clicks recorded for a Twitter message or post. A click is recorded for a Twitter message or post when a Twitter user clicks a link contained in one of your Twitter posts.</td>
<td>The Twitter clicks metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter clicks, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
</tbody>
</table>
| Send Date             | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  

- 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
- 🌆 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |

View A Preview Of A Twitter Message
To preview a Twitter message, go to Messages > Messages and click on Twitter. Then click the name of the Twitter message you want to preview. You will be taken to the Twitter Message Overview page. A preview of the Twitter message can be found on the left side of the page.

**View The Shortened URLs Used In Your Message**

If you choose to shorten and track URLs used in your message, you will be able to view the long version of the URL, the shortened version of the URL, and the number of clicks recorded for each URL.

You can click the report icon next to each shortened URL to view more metrics recorded for the shortened URL. For more information on shortened URL reports, see Detailed Click Metrics For A Shortened URL.

**View Metrics About A Twitter Message**

The grey bar at the top of the Twitter Message Overview page lets you view the high-level metrics for the Twitter message. Each metric shown is described below:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replies (Twitter)</td>
<td>The Twitter replies metric represents the total number of times users on Twitter replied to a post you made to Twitter. A Twitter user can choose to reply directly to your account via a Twitter post they receive from you by clicking <em>Reply</em> in Twitter.</td>
<td>The Twitter replies metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter replies, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to reply to a post.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Retweets (Twitter)</td>
<td>The Twitter retweets metric represents the total number of times a Twitter post is retweeted. When a message is posted to Twitter, Twitter users can retweet the post and share it with all of their followers.</td>
<td>The Twitter retweets metric is important because it represents a level of engagement with users on Twitter. If a user on Twitter retweets a Twitter message you posted, this generally means they were interested enough in the content of the post to share it with all of their Twitter followers. Retweets have the potential to expose your Twitter posts to a very large audience in a very short period of time.</td>
</tr>
<tr>
<td>Clicks (Twitter)</td>
<td>The Twitter clicks metric represents the total clicks recorded for a Twitter message or post. A click is recorded for a Twitter message or post when a Twitter user clicks a link contained in one of your Twitter posts.</td>
<td>The Twitter clicks metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter clicks, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
</tbody>
</table>

**View Posts Associated With A Twitter Message**

The **Posts Of This Message** section lets you see all of the posts associated with a particular Twitter message.

**View Which Delivery Groups A Twitter Message Has Been Added To**

The **Associated Delivery Groups** section lets you view which delivery groups the Twitter message has been added to.

For more information on delivery groups, see Delivery Groups on page 577.

**View Facebook**
The Facebook Message Overview page allows you to view a preview of an individual Facebook message, schedule new posts, view metrics for the Facebook message, view metrics for individual posts made using the Facebook message, and view what delivery groups the Facebook message has been added to.

**Related Topics**

*Post Facebook* on page 339

**Related Topics**

*Post Facebook* on page 339

*Set Up Your Account So You Can Post To Facebook* on page 1287

Integrating your account with a Facebook account allows you to post messages to Facebook.

*Create A Facebook Message* on page 251

**View All The Facebook Messages In Your Account**

To view all the Facebook messages in your account, go to Messages > Messages and then click Facebook.

Each of the columns in the Facebook messages table is described below:

<table>
<thead>
<tr>
<th>Columns Name</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The Message column displays the name of the Facebook message.</td>
<td>N/A</td>
</tr>
<tr>
<td>Last Edited</td>
<td>The last edited column shows the date the last time the Facebook message was edited or used in a post.</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Posts</td>
<td>The total posts column indicates the total number of posts made using the Facebook message.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**View A Facebook Message Preview**

To preview a Facebook message, go to Messages > Messages and click on Facebook. Then click the name of the Facebook message you want to preview. You will be taken to the Facebook Message Overview page. A preview of the Facebook message can be found on the left side of the page.
View Metrics About A Facebook Message

The grey bar at the top of the Facebook Message Overview page lets you view metrics associated with the Facebook message. Each metrics shown is described below:

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| Comments (Facebook) | The Facebook comments metric represents the total number of comments recorded for a Facebook message or post.  

  Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.  |
| Likes (Facebook)    | The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.  

  Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.  |
<p>|                     | The Facebook comments metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook comments, you can tell that Facebook users were engaged enough in the content of your post to respond in the form of a comment.  |
|                     | The Facebook likes metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. Generally speaking, it is a positive thing if someone takes the time to like your Facebook post.  |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicks (Facebook)</td>
<td>The Facebook clicks metric represents the total clicks recorded for a Facebook message or post.</td>
<td>The Facebook clicks metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook clicks, you can tell that Facebook users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
</tbody>
</table>

**View Posts Associated With A Facebook Message**

The **Posts Of This Message** section lets you see all of the posts associated with a particular Facebook message.

**View Which Delivery Groups A Facebook Message Has Been Added To**

The **Associated Delivery Groups** section lets you view which delivery groups the Facebook message has been added to.

For more information on delivery groups, see **Delivery Groups** on page 577.

**View Facebook Deliveries (Posts)**

The table on the **Facebook Deliveries** page contains information about the Facebook messages you have posted. Each column is described below.

To get to the **Facebook Deliveries** page:

1. Go to **Messages > Deliveries**.
2. Click **Facebook**.
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Message Name</strong></td>
<td>The Message Name column displays the name of the Facebook message.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The Status column indicates the state of the delivery or post. Each status is described below:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Skipped - The Skipped status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Partially Sent</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• Canceled</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Successful</td>
<td></td>
</tr>
<tr>
<td><strong>Comments (Facebook)</strong></td>
<td>The Facebook comments metric represents the total number of comments recorded for a Facebook message or post.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.</td>
<td></td>
</tr>
<tr>
<td><strong>Likes (Facebook)</strong></td>
<td>The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.</td>
<td></td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Clicks (Facebook)</strong></td>
<td>The Facebook clicks metric represents the total clicks recorded for a Facebook message or post.</td>
<td>The Facebook clicks metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook clicks, you can tell that Facebook users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
<tr>
<td><strong>Send Date</strong></td>
<td>The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• ![Diamond] - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• ![Diamond] - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week</td>
<td></td>
</tr>
</tbody>
</table>

### View SMS

You can view a list of all of your SMS messages from the **Messages > Messages** page, or click on the name of any SMS or MMS message in the SMS table to view the **SMS Message Overview** page.

The **SMS Message Overview** page allows you to view a preview of an individual SMS message, view metrics for the SMS message, view metrics for individual deliveries made using the SMS message, and view what delivery groups the SMS message has been added to. You can also schedule new deliveries and view reports from the SMS message overview page.
The SMS integration allows you to view the SMS short code for your account and to view and configure the STOP and HELP responses your contacts will receive.

All SMS Messages Page
You can view all of the SMS and MMS messages in your account from the Messages page.

To view all of the SMS and MMS messages in your account, go to Messages > Messages and then click SMS. From this page you can:

- Copy a message
- Delete a message
- Add the message to a delivery group
- Preview the message
- View a report for the message
- Send the message

You can also click on the name of the message to access the SMS Message Overview page for that message.

Each of the columns in the SMS Messages table is described below:

<table>
<thead>
<tr>
<th>Columns Name</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>The Message column displays the name of the SMS message.</td>
<td>N/A</td>
</tr>
<tr>
<td>API ID</td>
<td>The API ID for the SMS message.</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on interacting with SMS messages via the API, see smsMessageObject.</td>
<td></td>
</tr>
<tr>
<td>Last Edited</td>
<td>The Last Edited column displays the last time the SMS message was edited or used in a delivery.</td>
<td>N/A</td>
</tr>
<tr>
<td>Approved To Send</td>
<td>The Approved To Send column indicates if the SMS message has been approved and can be sent.</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on message approval, see Enable Message Approval Prior To Send on page 1332.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td>Total Deliveries</td>
<td>The <strong>Total Deliveries</strong> column indicates the total number of deliveries made using the SMS message.</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Recipients (SMS)</td>
<td>The <strong>Total Recipients (SMS)</strong> metric represents the total count of recipients who received an SMS message.</td>
<td>SMS Single Recipients + SMS Multi-Part Recipients = SMS Total Recipients</td>
</tr>
<tr>
<td>Total Replies</td>
<td>This is the <strong>Incoming (SMS)</strong> metric, which represents the total number of times contacts replied to an SMS message you sent them.</td>
<td></td>
</tr>
</tbody>
</table>

**SMS Or MMS Message Overview Page**

The overview page for an SMS or MMS message contains high-level metrics for the message, a preview of the message, information about any delivery groups the message is associated with, and all deliveries of the message. You can also edit, delete, or schedule an SMS or MMS message from this page.

**Message Metrics**

The gray bar at the top of the **SMS Message Overview** page lets you view the high-level metrics for the SMS message. Each metric shown is described below:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Recipients (SMS)</td>
<td>The <strong>Single Recipients (SMS)</strong> metric represents the count of recipients receiving a single SMS message. You can compare this metric with the <strong>Multi-Part Recipients (SMS)</strong> metric to find out the <strong>Total Recipients (SMS)</strong> metric.</td>
<td>SMS Total Recipients - SMS Multi-Part Recipients = SMS Single Recipients</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><em>Multi-Part Recipients (SMS)</em></td>
<td>The <em>Multi-Part Recipients (SMS)</em> metric displays the number of recipients who were sent an SMS message that was split into multiple parts due to the message content exceeding the 160 character limit. Each message split will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.</td>
<td>SMS Total Recipients - SMS Single Recipients = SMS Multi-Part Recipients</td>
</tr>
</tbody>
</table>

**Note:** SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-Part Messages (SMS)</td>
<td>The <em>Multi-Part Messages (SMS)</em> metric displays the number of SMS messages that exceeded the 160 character limit and were split into multiple parts. Each part of the message is split into to will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.</td>
<td>SMS Total Sent - SMS Single Recipients = SMS Multi-Part Messages</td>
</tr>
<tr>
<td>Total Sent (SMS)</td>
<td>The <em>Total Sent (SMS)</em> sent metric represents the total number SMS messages sent. The <em>Total Sent (SMS)</em> metric is important to know for the purpose of making sure you don't exceed the number of SMS messages allocated for your account.</td>
<td>SMS Delivered + SMS Undeliverable = SMS Total Sent</td>
</tr>
<tr>
<td>Delivery Rate (SMS)</td>
<td>The <em>Delivery Rate (SMS)</em> metric represents the percentage of SMS messages that were successfully delivered.</td>
<td>(SMS Delivered / SMS Total Sent) * 100 = SMS Delivery Rate</td>
</tr>
<tr>
<td>Delivered (SMS)</td>
<td>The <em>Delivered (SMS)</em> metric represents the total number of SMS messages that were successfully delivered.</td>
<td>SMS Total Sent - SMS Undeliverable = SMS Delivered</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Undeliverable Rate (SMS)</td>
<td>The <em>Undeliverable Rate (SMS)</em> metric represents the percentage of SMS messages that were not delivered.</td>
<td>(SMS Undeliverable / SMS Total Sent) * 100 = SMS Undeliverable Rate</td>
</tr>
<tr>
<td>Undeliverable (SMS)</td>
<td>The <em>Undeliverable (SMS)</em> metric represents the number of sent SMS messages that were not delivered.</td>
<td>SMS Total Sent - SMS Delivered = SMS Undeliverable</td>
</tr>
<tr>
<td>Incoming Rate (SMS)</td>
<td>The <em>Incoming Rate (SMS)</em> metric represents the percentage replies recorded for an SMS message. Note: Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.</td>
<td>(SMS Incoming / SMS Total Sent) * 100 = SMS Incoming Rate</td>
</tr>
<tr>
<td>Incoming (SMS)</td>
<td>The <em>Incoming (SMS)</em> metric represents the total number of times contacts replied to an SMS message you sent them. Note: Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.</td>
<td>The <em>Incoming (SMS)</em> metric is a total of the number of times contacts replied to an SMS message you sent them.</td>
</tr>
</tbody>
</table>
**Associated Delivery Groups**

In the Associated Delivery Groups section, you can view which delivery groups the SMS message has been added to.

**Deliveries Of This Message**

The Deliveries Of This Message section lets you see all of the deliveries associated with a particular SMS or MMS message.

You can view the following metrics:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>The Status column indicates the state of an SMS delivery. Each status is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• Sent - The Sent status represents SMS deliveries that have been successfully sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sending - The Sending status represents SMS deliveries that are in the process of being sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Skipped</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Unsent</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Archived</td>
<td></td>
</tr>
<tr>
<td><strong>Send Date</strong></td>
<td>The Send Date column contains the actual date and time the SMS delivery was sent.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Total Sent (SMS)</strong></td>
<td>The Total Sent (SMS) sent metric represents the total number SMS messages sent. The Total Sent (SMS) metric is important to know for the purpose of making sure you don't exceed the number of SMS messages allocated for your account.</td>
<td>SMS Delivered + SMS Undeliverable = SMS Total Sent</td>
</tr>
<tr>
<td><strong>Total Recipients (SMS)</strong></td>
<td>The Total Recipients (SMS) metric represents the total count of recipients who received an SMS message.</td>
<td>SMS Single Recipients + SMS Multi-Part Recipients = SMS Total Recipients</td>
</tr>
<tr>
<td><strong>Total Clicks (SMS)</strong></td>
<td>The Total Clicks (SMS) metric represents the total number of times links contained in an SMS message were clicked.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Unique Clicks (SMS)  | The *Unique Clicks (SMS)* metric is the sum of all the unique clicks recorded for an SMS message. A *unique click* is recorded the first time a contact clicks any link contained in an SMS you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.  

**Note:** The *Unique Clicks (SMS)* metric is not the same as the *Total Clicks (SMS)* metric. For more information on the *Total Clicks (SMS)* metric and how it is calculated, see [SMS Total Clicks Metric](#) on page 890. | The *Unique Clicks (SMS)* metric is the sum of all the unique clicks recorded for an SMS message.                                                                                                                                                                      |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-Part Messages (SMS)</td>
<td>The Multi-Part Messages (SMS) metric displays the number of SMS messages that exceeded the 160 character limit and were split into multiple parts. Each part the message is split into will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.</td>
<td>SMS Total Sent - SMS Single Recipients = SMS Multi-Part Messages</td>
</tr>
</tbody>
</table>

**Note:** SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.
### Metric Table

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incoming (SMS)</td>
<td>The <em>Incoming (SMS)</em> metric represents the total number of times contacts replied to an SMS message you sent them.</td>
<td>The <em>Incoming (SMS)</em> metric is a total of the number of times contacts replied to an SMS message you sent them.</td>
</tr>
</tbody>
</table>

**Note:** Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

---

### View All SMS Deliveries For Your Account

The table on the [SMS Deliveries](#) page contains information about the SMS messages you have sent. Auto confirmation messages and workflow-based sends are not added to this list. They are added to the outbound queue but do not generate deliveries.

To get to the SMS Deliveries page:

1. Go to **Messages > Deliveries**.
2. Click **SMS**.

---

### Metric Table

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>How It's Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name</td>
<td>The <em>Message Name</em> column displays the name of the SMS message.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The Status column indicates the state of an SMS delivery. Each status is</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>described below:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Sent</strong> - The <strong>Sent</strong> status represents SMS deliveries that have been</td>
<td></td>
</tr>
<tr>
<td></td>
<td>successfully sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Sending</strong> - The <strong>Sending</strong> status represents SMS deliveries that are</td>
<td></td>
</tr>
<tr>
<td></td>
<td>in the process of being sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Skipped</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Unsent</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Archived</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Send Date</strong></td>
<td>The <strong>Send Date</strong> column contains the actual date and time the SMS delivery</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>was sent.</td>
<td></td>
</tr>
<tr>
<td><strong>Total Sent (SMS)</strong></td>
<td>The <strong>Total Sent (SMS)</strong> sent metric represents the total number SMS</td>
<td>SMS Delivered + SMS</td>
</tr>
<tr>
<td></td>
<td>messages sent. The <strong>Total Sent (SMS)</strong> metric is important to know for the</td>
<td>Undeliverable = SMS Total Sent</td>
</tr>
<tr>
<td></td>
<td>purpose of making sure you don't exceed the number of SMS messages</td>
<td></td>
</tr>
<tr>
<td></td>
<td>allocated for your account.</td>
<td></td>
</tr>
<tr>
<td><strong>Total Recipients (SMS)</strong></td>
<td>The <strong>Total Recipients (SMS)</strong> metric represents the total count of recipients who received an SMS message.</td>
<td>SMS Single Recipients + SMS Multi-Part Recipients = SMS Total Recipients</td>
</tr>
<tr>
<td><strong>Total Clicks (SMS)</strong></td>
<td>The <strong>Total Clicks (SMS)</strong> metric represents the total number of times links contained in an SMS message were clicked.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unique Clicks (SMS)</td>
<td>The Unique Clicks (SMS) metric is the sum of all the unique clicks recorded for an SMS message. A unique click is recorded the first time a contact clicks any link contained in an SMS you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded. <strong>Note:</strong> The Unique Clicks (SMS) metric is not the same as the Total Clicks (SMS) metric. For more information on the Total Clicks (SMS) metric and how it is calculated, see SMS Total Clicks Metric on page 890.</td>
<td>The Unique Clicks (SMS) metric is the sum of all the unique clicks recorded for an SMS message.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Multi-Part Messages (SMS)</strong></td>
<td>The <em>Multi-Part Messages (SMS)</em> metric displays the number of SMS messages that exceeded the 160 character limit and were split into multiple parts. Each part the message is split into will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages. <strong>Note:</strong> SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.</td>
<td>SMS Total Sent - SMS Single Recipients = SMS Multi-Part Messages</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Incoming (SMS)</td>
<td>The <em>Incoming (SMS)</em> metric represents the total number of times contacts replied to an SMS message you sent them.</td>
<td>The <em>Incoming (SMS)</em> metric is a total of the number of times contacts replied to an SMS message you sent them.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.</td>
<td></td>
</tr>
</tbody>
</table>

**Preview An SMS or MMS Message**

You can preview your SMS or MMS message by clicking the **Show Preview** button, opening the overview page for the message, or clicking the preview icon on the **All Messages** page.

If a message is split into multiple messages due to it exceeding the character limit, each message will be shown on the **SMS Message Overview** page.

To preview an SMS message:

1. Go to **Messages > Messages**.
2. Click on the name of the SMS message you want to preview. You will be taken to the **SMS Message Overview** page.

![Example SMS message](image)

**View An SMS or MMS Report**

SMS and MMS message reports can provide you with valuable information about the performance of an SMS message. This includes recipient, delivery rate, and click rate metrics.

You can access reports from the All Messages page or the Message Overview page. For more information on SMS message reports, see **SMS Message Report Overview Metrics** on page 691.

To view a report from the **All Messages** page, find the message in the table and click its report icon.

To view a report for an SMS or MMS message from the **SMS Message Overview** page:

1. Go to **Messages > Messages**.
2. Click **SMS**.
3. Click on the name of the SMS or MMS message you want to edit.
4. Click the View Full Message Report located under the gray metrics bar.

**View Sent Email Deliveries**

The table on the Email Deliveries page contains information about the email messages you have sent.

If a message is scheduled to go to a list/segment of unsubscribed contacts, or if all contacts are deleted from the list/segment before the message is sent, the delivery is marked as skipped.

For more information on automated message rules, see Automated Message Rules on page 419. For more information on A/B split tests, see A/B Split Tests on page 321. For more information on sending test messages, see Message Testing Program.

To get to the Email Deliveries page:

Go to Messages > Deliveries.

Each column in the table is described below.

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name: Subject</td>
<td>The Message Name: Subject column displays the name of the email message and the subject line. <strong>Note:</strong> When searching for an email delivery or sorting the Message Name: Subject column, you can only search and sort based on the email message name. You can not search or sort based on the subject. <strong>Note:</strong> If the message was used in a remail delivery, the word Remail will appear at the beginning of the subject line. Remails (also know as remarketing) allow you to send a follow-up email to contacts as a reminder or to persuade them to continue along the conversion process.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
</tbody>
</table>
| Delivery Type | The delivery Type represents the type of send. Each type is described below:  
- **Normal** - The *Normal* email delivery type represents a regular email delivery sent to more than one contact.  
- **Bulk** - The *Bulk* email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.  
- **Skipped** - The *Skipped* email delivery type represents email messages that were skipped by Bronto and not sent.  
- **Single Contact** - The *Single Contact* email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as *Single Contact*, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.  
- **Test** - The *Test* email delivery type represents email deliveries that were sent as test deliveries.  
- **AMR** - The *AMR* email delivery type represents email deliveries that were sent via an Automated Message Rule.  
- **Split Group** - The *Split Group* email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.  
- **FTAF** - The *Forwards to a Friend* email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.  
- **Transactional** - The *Transactional* email delivery type represents email deliveries were sent as transactional emails.   
  
  **Note:** A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.  
  
  **Note:** Transactional deliveries are hidden by default. For information on how to show them, see View Transactional Email Deliveries on page 1014. | N/A |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Status**  | The Status column indicates the state of the delivery or post. Each status is described below:  
  - *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  - *Partially Sent*  
  - *Canceled*  
  - *Successful* | N/A |
<p>| <strong>Recipients</strong> | The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column. | N/A |</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Send Date** | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  - 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  - 📅 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |
| **Sent**    | The emails sent metric represents the total number of emails that were sent.  
  💡 **Note:** Deleted email deliveries will still be counted as part of the emails sent metric.                                                                                                                                                                           | The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered. |
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Revenue Per Email</td>
<td>The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The Revenue Per Email metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td>Contact Loss Rate (email)</td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them. <strong>Tip:</strong> For more information on the inactive status type, see Contact Status on page 1083.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

**Related Topics**

Outgoing Deliveries And Posts on page 327

The Outgoing Deliveries page lets you see all of the deliveries and posts that are currently scheduled to be delivered or posted (i.e. all of your outgoing deliveries or posts).

**Related Topics**

Delivery Calendar on page 341

The Delivery Calendar is a great way to see when your messages went out in the past, and when your messages are scheduled to go out in the future.
View Twitter Deliveries (Posts)

The table on the Twitter Deliveries page contains information about the Twitter messages you have posted. Each column is described below.

To get to the Twitter Deliveries page:

1. Go to Messages > Deliveries.
2. Click Twitter.

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name</td>
<td>The Message Name column displays the name of the Twitter message.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
| Status            | The Status column indicates the state of the delivery or post. Each status is described below:  
|                   | • Skipped - The Skipped status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
<p>|                   | • Partially Sent                                                            | N/A                            |
| Replies (Twitter) | The Twitter replies metric represents the total number of times users on Twitter replied to a post you made to Twitter. A Twitter user can choose to reply directly to your account via a Twitter post they receive from you by clicking Reply in Twitter.  | The Twitter replies metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter replies, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to reply to a post. |</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Retweets (Twitter)</strong></td>
<td>The Twitter retweets metric represents the total number of times a Twitter post is retweeted. When a message is posted to Twitter, Twitter users can retweet the post and share it will all of their followers.</td>
<td>The Twitter retweets metric is important because it represents a level of engagement with users on Twitter. If a user on Twitter retweets a Twitter message you posted, this generally means they were interested enough in the content of the post to share it with all of their Twitter followers. Retweets have the potential to expose your Twitter posts to a very large audience in a very short period of time.</td>
</tr>
<tr>
<td><strong>Clicks (Twitter)</strong></td>
<td>The Twitter clicks metric represents the total clicks recorded for a Twitter message or post. A click is recorded for a Twitter message or post when a Twitter user clicks a link contained in one of your Twitter posts.</td>
<td>The Twitter clicks metric is important because it represents a level of engagement with users of Twitter, and begins to highlight the effectiveness of the content contained in your Twitter posts. With Twitter clicks, you can tell that Twitter users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
</tbody>
</table>
| **Send Date** | The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:  
  * 🌔 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours  
  * 🌕 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week | N/A |
**View Facebook Deliveries (Posts)**

The table on the **Facebook Deliveries** page contains information about the Facebook messages you have posted. Each column is described below.

To get to the **Facebook Deliveries** page:

1. Go to **Messages > Deliveries**.
2. Click **Facebook**.

<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Message Name</strong></td>
<td>The Message Name column displays the name of the Facebook message.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
| **Status**      | The Status column indicates the state of the delivery or post. Each status is described below:  

  - **Skipped**: The Skipped status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  - **Partially Sent**  
  - **Canceled**  
  - **Successful**

| **Comments (Facebook)** | The Facebook comments metric represents the *total number of comments* recorded for a Facebook message or post.  

  **Note**: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.  

| **Likes (Facebook)** | The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.  

  **Note**: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.  

<p>|</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clicks (Facebook)</strong></td>
<td>The Facebook clicks metric represents the total clicks recorded for a Facebook message or post.</td>
<td>The Facebook clicks metric is important because it represents a level of engagement with users of Facebook, and begins to highlight the effectiveness of the content contained in your Facebook posts. With Facebook clicks, you can tell that Facebook users were not only interested enough to read your post, but they were also interested enough in the content to click the link(s) contained in the post.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> In order to track clicks for a Facebook message, you need to have enable URL shortening and tracking. For instructions on how to do this, see Create A Facebook Message on page 251.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.</td>
<td></td>
</tr>
<tr>
<td><strong>Send Date</strong></td>
<td>The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• 🕰️ - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 🌞 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week</td>
<td></td>
</tr>
</tbody>
</table>

**View All SMS Deliveries For Your Account**

The table on the **SMS Deliveries** page contains information about the SMS messages you have sent. Auto confirmation messages and workflow-based sends are not added to this list. They are added to the outbound queue but do not generate deliveries.

To get to the SMS Deliveries page:

1. Go to **Messages > Deliveries**.
2. Click **SMS**.
Each column is described below.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>How It's Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Message Name</strong></td>
<td>The <strong>Message Name</strong> column displays the name of the SMS message.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
| **Status**              | The Status column indicates the state of an SMS delivery. Each status is described below:  
  • **Sent** - The **Sent** status represents SMS deliveries that have been successfully sent.  
  • **Sending** - The **Sending** status represents SMS deliveries that are in the process of being sent.  
  • **Skipped**  
  • **Unsent**  
  • **Archived** | N/A                                                                         |
<p>| <strong>Send Date</strong>           | The <strong>Send Date</strong> column contains the actual date and time the SMS delivery was sent. | N/A                 |
| <strong>Total Sent (SMS)</strong>    | The <strong>Total Sent (SMS)</strong> sent metric represents the total number SMS messages sent. The <strong>Total Sent (SMS)</strong> metric is important to know for the purpose of making sure you don't exceed the number of SMS messages allocated for your account. | SMS Delivered + SMS Undeliverable = SMS Total Sent |
| <strong>Total Recipients (SMS)</strong> | The <strong>Total Recipients (SMS)</strong> metric represents the total count of recipients who received an SMS message. | SMS Single Recipients + SMS Multi-Part Recipients = SMS Total Recipients |
| <strong>Total Clicks (SMS)</strong>  | The <strong>Total Clicks (SMS)</strong> metric represents the total number of times links contained in an SMS message were clicked. | N/A                 |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>How It's Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Clicks (SMS)</td>
<td>The <em>Unique Clicks (SMS)</em> metric is the sum of all the unique clicks recorded for an SMS message. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an SMS you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded. <strong>Note:</strong> The <em>Unique Clicks (SMS)</em> metric if not the same as the <em>Total Clicks (SMS)</em> metric. For more information on the <em>Total Clicks (SMS)</em> metric and how it is calculated, see <a href="#">SMS Total Clicks Metric</a> on page 890.</td>
<td>The <em>Unique Clicks (SMS)</em> metric is the sum of all the unique clicks recorded for an SMS message.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Multi-Part Messages (SMS)</td>
<td>The <em>Multi-Part Messages (SMS)</em> metric displays the number of SMS messages that exceeded the 160 character limit and were split into multiple parts. Each part the message is split into will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages. <strong>Note:</strong> SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.</td>
<td>SMS Total Sent - SMS Single Recipients = SMS Multi-Part Messages</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>How It's Calculated</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Incoming (SMS)</td>
<td>The <em>Incoming (SMS)</em> metric represents the total number of times contacts replied to an SMS message you sent them.</td>
<td>The <em>Incoming (SMS)</em> metric is a total of the number of times contacts replied to an SMS message you sent them.</td>
</tr>
</tbody>
</table>

**View Transactional Email Deliveries**

In the table on the All Deliveries page, you can show or hide transactional email deliveries.

To view transactional deliveries in an email deliveries table:

1. Go to Messages > Deliveries.

2. Click Show Advanced Options.
3. In the Delivery Type section, click the Transactional box.
4. Click Search.

**View Email Deliveries Sent To A Single Contact**

In the table on the All Deliveries page, you can show or hide Single Contact email deliveries.

To view single contact email deliveries in an email deliveries table:

Tip: The Single Contact email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as Single Contact, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.

1. Go to Messages > Deliveries.
2. Click **Show Advanced Options**.

3. In the **Delivery Type** section, click the **Single Contact** box.

4. Click **Search**.

**View Email Deliveries In A Date Range**

The advanced filtering options allow you to filter email deliveries in tables by date range and delivery type.

To email deliveries from a specific date range:

1. Go to **Messages > Deliveries**.

2. Click **Show Advanced Options**.

3. Click the calendar icon in the **Starting On** text box.

4. Select a start date.

5. Click the second text box in the **Starting On** text box.

6. Select a start time.

7. Click the calendar icon in the **Ending On** text box.

8. Select an ending date.

9. Click the second text box in the **Ending On** text box.

10. Select an end time.

11. Optional: In the **Delivery Type** section, click the checkbox next to the type of deliveries you want shown in the table. You can select:

   - Bulk: messages that were sent in bulk and includes normal deliveries and split deliveries.
   - Skipped: messages that were skipped by Bronto and not sent.
   - Test: messages that were sent with a test status.
   - AMR: messages that were sent using an Automated Message Rule.
   - Single Contact: messages that were only sent to one contact.
   - Transactional: messages that were sent with a transactional status.

   Normal deliveries are shown by default. FTAF deliveries are not available in delivery groups.

12. Click **Search**.

**View A Delivery Report**

Delivery reports provide you with data about the performance of a delivery.

Each tab at the top of a delivery report provides a different set of metrics:
• **Overview** displays the overview page. For more information about Overview metrics, see Report: Overview Metrics (Legacy) on page 702.

• **Deliverability** display deliverability metrics for the message. For more information about Deliverability metrics, see Report Deliverability Metrics (Legacy) on page 714.

• **Opens** displays the metrics related to message opens. For more information about Detailed Open metrics, see Report: Open Metrics (Legacy) on page 721.

• **Clicks** displays detailed information about the metrics related to message clicks. For more information about Detailed Click metrics, see Report: Click Metrics (Legacy) on page 726.

• **Conversions** displays detailed information about the metrics related to message conversions. For more information about Detailed Conversion metrics, see Report: Conversion Metrics (Legacy) on page 730.

• **Sharing** displays detailed information about the metrics related to shares. For more information about Detailed Sharing metrics, see Report: Sharing Metrics (legacy) on page 734.

• **Profiler** allows you to view Delivery, Message, and Delivery Group Metrics (Sent, Opened, Clicked, Converted, Bounced) broken down by contact attributes. For more information about Profiler, see Report Profiler on page 751.

For more information on delivery reports, see Delivery Reports (Legacy) on page 684.

To view a report for a delivery:

1. Go to **Messages > Deliveries**.

2. Click on the report icon associated with a delivery.

3. Click a tab at the top of the report to view the different sections of the report.
   
   For example, click **Deliverability** to view the detailed deliverability metrics. For more information about report sections, see Report Sections (Legacy Reports) on page 702.

4. To filter the report by a date range:
   
   a) Click the calendar icon.
   
   The calendar icon is to the right of the last report section tab.
   
   b) Select a date filter from the list of available filters.
   
   If a filter has an arrow to the left of it, clicking on the filter drops down a list of additional choices.
When you filter a report by a date range, report metrics in gray bars and graphs may vary from the metrics in report grids because these datasets are collected differently. Metrics provided in bars and graphs are based on the event date. Metrics provided in report grids, like the grid on the Clicks tab, are based on the delivery date.

- To use a custom date range, click **Custom** and add a start and an end date in the date boxes.

- To remove the filter, click the calendar icon and then click on **All Time**.

You can also:

- [Download A Summary of Detailed Contact Report](#) on page 821
- [Add Contacts From A Report To A List](#) on page 853
- [View A Comparison Report For Deliveries](#) on page 1017
- [View A Different Delivery Or View The Message Report](#)
- [View A Report For A Specific Delivery Added To A Delivery Group](#) on page 688
- Print a report by clicking the **Print** button.

**Related Topics**

- [Report Sections (Legacy Reports)](#) on page 702
- Report sections are the grouping of metrics that are found on reports.

**View A Comparison Report For Deliveries**

You can add deliveries to a comparison report from the deliveries page.

You can view metrics for deliveries, deliveries made using a specific message, deliveries sent via an automated message rule, or deliveries in a specific delivery group. You can compare a maximum of six deliveries, messages, automated message rules, or delivery groups.

For more information on comparison reports, see [Comparison Reports](#) on page 756.

To add an item to comparison report:

1. Go to **Messages > Deliveries**.

2. Click the checkboxes next to the deliveries or posts you want to compare.

   You can compare a total of six deliveries.

3. Click **Compare**.

   The comparison report is displayed.

4. Provided you have less than six items added to the comparison report, you can add additional items to compare by clicking

   - Add Delivery
   - Add Message
   - Add Automated Message
The **Product Search** page allows you to quickly search through imported product data.

It can take up to 24 hours, but typically only takes about 10 minutes, for the update of product data to complete. You may see unexpected results when you do a product search while the products are in the update process. If you receive unexpected search results and recently ran an import, we suggest you wait a few minutes then search for your product data again.

You can use this page to filter products based on the product attributes and can sort your search results based on any column except the **Product ID**, **Product List**, **Text Area**, **URL**, or **Multi**. In the product search table you will see all of the standard and custom product fields you have mapped and imported.

The following table shows the Bronto system fields you will see:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created Date</td>
<td>Date and time the product was first added to the product catalog.</td>
</tr>
<tr>
<td>Price Last Modified Date</td>
<td>Date and time the product's Price was last changed in the product catalog.</td>
</tr>
<tr>
<td>Quantity Last Modified Date</td>
<td>Date and time the product's Quantity was last changed in the product catalog.</td>
</tr>
<tr>
<td>Updated Date</td>
<td>Last date and time that any change was made to the product in the product catalog. This is not necessarily the same date and time as the most recent import because it is possible the most recent import didn't change any fields for an individual product.</td>
</tr>
<tr>
<td>Availability Last Modified Date</td>
<td>Date and time the product's Availability was last changed in the product catalog.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage Price Change</td>
<td>When the price of an item in a catalog changes, this value represents the percentage the price increased or decreased from the previous price. For example, the Price of a product was $50 when an import occurs that updates the price to $40. The Percentage Price Change for this product would be -20, representing a 20% price drop.</td>
</tr>
</tbody>
</table>

**Related Topics**

- **Initial Product Data Feed Import Process** on page 1121
  
  You must follow a specific process to import product data into Bronto for the first time.

- **Products**

  **Related Topics**

  - **Product Field Descriptions** on page 1130

  **Products Overview Page**

  The **Products Overview** page is the starting point for all of the functionality related to importing your product data feeds into Bronto.

  Here you can access the configuration, fields, import, transaction report, and the product search pages. The page is designed to guide you through the steps of your first import. To facilitate this, each step in the import process is only available after you have successfully completed the previous step. After your first import you will be able to access all of the product import steps.

  The **Products Overview** page also has a **Products Snapshot** that provides an at-a-glance view of the state of your imported product data.

  ![Products Snapshot](image)

  If you have order data, you will see the **Revenue** summary data widget. This widget shows you the actual revenue for the last 7 days. You can also see the trending revenue for the last 7 days for products that have a **Created Date** at least 30 days old. You can see the top 5 results or the bottom 5 results.

  If you have browse data, you will see the **Page Views** summary data widget. This widget shows you the actual page views for the last 7 days. You can also see the trending page views for the last 7 days for products that have a **Created Date** at least 30 days old You can see the top 5 results or the bottom 5 results.

  If you have both data, you will see both widgets. The trends for each widget is calculated using the 7-day short trend.
The 7-day short trend is a comparison of the average number of daily page views/product orders in the last 7 days versus the average number of daily page views/product orders in the last 30 days.

- One means unit views are flat.
- Greater than one means views comparatively increased.
- Less than one means views have comparatively decreased.

Products Snapshot

The **Products Snapshot** allows to view information about the products you have imported into Bronto.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Products</td>
<td>Total number of unique product records that are stored in Bronto. This includes active and archived products.</td>
<td>This metric is important because it lets you quickly see if the number of records imported is close to the number of records in your product data feed. If <strong>Total Products</strong> is much larger or smaller than expected, you know to check the import logs for issues.</td>
</tr>
<tr>
<td>Active</td>
<td>The number of available product records in your product feed.</td>
<td>The <strong>Active</strong> metric is important because it allows you to see a quick number of how many product attributes are available. If this number is lower than expected, you might want to check import transaction logs to see if all of the desired product attributes are importing correctly. If they are not there may be an issue with the field mappings to your data feed.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Archived</td>
<td>The number of records that were imported but are not currently available for use because a more recent product data feed import did not include these records.</td>
<td>This metric is important because it lets you know if product data is being lost from import to import. If a large number of records are archived, check to make sure that you didn't have an import where only a partial product data feed was imported.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>The last time a product data feed import was run.</td>
<td>The <strong>Last Updated</strong> metric lets you quickly see if imports are occurring as expected.</td>
</tr>
</tbody>
</table>

**Search for Products by Attribute**

You can search products to see a list of products with similar attributes or to find a specific product by searching for a product based on its field.

To search for products:

1. Go to **Tables > Products > Overview**.
2. Click **Search Products**. The **Search Products** page is displayed.
3. Select the product field you want to search on.
   You should see every type of product field you have imported in the list of available options.
   When you select a field some, but not all, fields will add the option to select additional filter criteria.
4. If the filter list is displayed, select a filter from the list.
   For example, if you selected a field that is based on a date you will need to choose if you want to see products that fall on, before, or after that date. Typically, numerical fields include additional filter criteria and text fields do not.
5. Enter the value you would like to search for in the **Search** box.
6. Click **Search**. The products that match your search criteria are displayed in the table. For more information about the fields shown in the table see **Product Field Descriptions** on page 1130. You can sort your search results based on any column except the **Product ID**.

**Related Topics**

**Product Field Descriptions** on page 1130
Orders Page

The Orders page allows you to search through and view the orders in your account.

**Important:** This topic does not apply to you if you are not using Order Service.

You can access the Orders page from Tables > Orders menu. If you do not see this page in the application, you are still using the legacy order service and the Orders page topics do not apply to you.

From the Orders page you can search your account for order data based either on a contact's ID, email address, an order number, or a date range. This allows you to dig deeper into the conversion metrics for your messages. For example, if you see a contact conversion on a Delivery report, you can then search for that contact's ID on the Orders page to see what other types of items the customer has bought. Looking up order data for several customers who converted on the same item can reveal patterns in purchasing behavior that allow you to better segment contacts and target your marketing campaigns. If you search by Order ID, you can view the specifics of that order and use the information to troubleshoot questions or concerns.

After you have search results, click on any Order ID to view the Order Details. The left side of the Order Details is a receipt that includes order data relevant to the entire order. The right side of the Order Details is an itemized list of each product in the order. If an order has a large number of products, the list of products can be scrolled independently from the rest of the page.

---

### Orders

<table>
<thead>
<tr>
<th>Order Id</th>
<th>Status</th>
<th>Order Date</th>
<th>Creation Date</th>
<th>Contact</th>
<th>Tax Amount</th>
<th>Discount Amount</th>
<th>Subtotal</th>
<th>Shipping Amount</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9d4c68e4-6b37-5e94-a900-1e56256b4614</td>
<td>n/a</td>
<td>07/22/2014 12:00 PM</td>
<td>07/22/2014 12:00 PM</td>
<td>n/a</td>
<td>$19.99</td>
<td>$0.00</td>
<td>$19.99</td>
<td>$0.00</td>
<td>$19.98</td>
</tr>
<tr>
<td>e6d3d1e4-e9e2-5f8b-85e6-f402f805aa0a</td>
<td>n/a</td>
<td>07/25/2014 02:00 PM</td>
<td>07/25/2014 02:00 PM</td>
<td>n/a</td>
<td>$25.00</td>
<td>$0.00</td>
<td>$25.00</td>
<td>$0.00</td>
<td>$25.00</td>
</tr>
<tr>
<td>9e5f7c72-66f7-69a5-85e4-f79af805a00a</td>
<td>n/a</td>
<td>07/25/2014 02:10 PM</td>
<td>07/25/2014 02:10 PM</td>
<td>n/a</td>
<td>$35.00</td>
<td>$0.00</td>
<td>$35.00</td>
<td>$0.00</td>
<td>$35.00</td>
</tr>
<tr>
<td>5b286862-4ecb-57e4-b968-1e80303b191e</td>
<td>n/a</td>
<td>08/27/2014 09:19 AM</td>
<td>08/27/2014 09:19 AM</td>
<td>n/a</td>
<td>$40.00</td>
<td>$0.00</td>
<td>$40.00</td>
<td>$0.00</td>
<td>$40.00</td>
</tr>
<tr>
<td>584b52b0-6b7b-431c-875f-79402f805a0a</td>
<td>n/a</td>
<td>08/27/2014 11:10 AM</td>
<td>08/27/2014 11:10 AM</td>
<td>n/a</td>
<td>$45.00</td>
<td>$0.00</td>
<td>$45.00</td>
<td>$0.00</td>
<td>$45.00</td>
</tr>
<tr>
<td>1a4b9e87-665f-6e9c-85e2-609c802e61eb</td>
<td>n/a</td>
<td>08/27/2014 11:30 AM</td>
<td>08/27/2014 11:30 AM</td>
<td>n/a</td>
<td>$50.00</td>
<td>$0.00</td>
<td>$50.00</td>
<td>$0.00</td>
<td>$50.00</td>
</tr>
<tr>
<td>e0688a8d-80bf-4b30-895b-777518be090e</td>
<td>n/a</td>
<td>08/27/2014 12:10 AM</td>
<td>08/27/2014 12:10 AM</td>
<td>n/a</td>
<td>$55.00</td>
<td>$0.00</td>
<td>$55.00</td>
<td>$0.00</td>
<td>$55.00</td>
</tr>
<tr>
<td>f128b16e-12a8-4dbd-9a77-2254ed552e</td>
<td>n/a</td>
<td>08/27/2014 02:46 AM</td>
<td>08/27/2014 02:46 AM</td>
<td>n/a</td>
<td>$60.00</td>
<td>$0.00</td>
<td>$60.00</td>
<td>$0.00</td>
<td>$60.00</td>
</tr>
</tbody>
</table>

### Order Details

**Nine West Women's Lucero Pump**
- **SKU:**
- **Category:**
- **Description:**
- **Product URL:** Nine West Women's Lucero Pump
- **Unit Price:** $0.00
- **Quantity:** 1
- **Sale Price:** $0.00
- **Total Price:** $0.00

**Butterfly Fish**
- **SKU:**
- **Category:**
- **Description:**
- **Product URL:** Butterfly Fish
- **Unit Price:** $0.00
- **Quantity:** 1
- **Sale Price:** $0.00
- **Total Price:** $0.00

**Canon Digital Rebel XT BMP Digital SLR Camera**
- **SKU:**
- **Category:**
- **Description:**
- **Product URL:** Canon Digital Rebel XT BMP Digital SLR Camera
- **Unit Price:** $0.00
- **Quantity:** 1
- **Sale Price:** $0.00
- **Total Price:** $0.00

---

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Search for Orders

Search on the Orders page allows you to quickly locate specific orders based on an order or contact's identifier.

Important: This topic does not apply to you if you are not using Order Service.

You can search for an order using a contact's ID, email address, or an order number or you can search for all orders within a specific date range.

To search for orders:

1. Go to Tables > Orders.
   
The Orders page is displayed.

2. Enter the identifier you want to search for in the Search box.
   
   Skip this step and step 3 if you want to see all of your orders from a particular date range without any additional filtering.

3. From the pull-down menu, select
   
   - Customer Order ID if you are searching for a specific order using the order's ID.
   - Contact Email if you are searching using a contact's email address.
   - Contact ID if you are searching using a contact's unique identifier.

4. If you want to limit your search to a specific date range, click Show Advanced Options. Then:
   
   a) Click the Starting On calendar icon and select the date you want the search range to begin with.
   b) Click the at box and select a time.
   c) Click the Ending On calendar icon and select the date you want the search range to end with.
   d) Click the second at box and select a time.

5. Click Search.
   
The orders that match your search criteria are displayed. For more information about the fields in the table, see Orders Page Grid Descriptions on page 1023.

6. Click an Order ID to view more detailed information about the order.
   
   For more information about each field in the order details see Order Fields / Order Details on page 1025.

Orders Page Grid Descriptions

After you search for either a Customer Order ID or a Contact ID on the Orders page, the results are displayed in the Orders table.

Important: This topic does not apply to you if you are not using Order Service.
For more information about searching for orders on the Orders page, see Search for Orders on page 1023. When you click on an Order ID in the Orders table, the details of an order are displayed. For more information about each field in the order details see Order Fields / Order Details on page 1025.

Each column in the Orders table is described below:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Id</td>
<td>The order ID represents the unique identifier for a particular order.</td>
<td>The order ID is the unique identifier for an order. This ID is often used to sync this data with another system.</td>
</tr>
<tr>
<td>Customer Order Id</td>
<td>The order Id given to the customer</td>
<td>N/A</td>
</tr>
<tr>
<td>Order Status</td>
<td>The current status of the order; either Pending or Processed.</td>
<td>The order status lets you know if the order has been processed or not, which can be helpful if there is a concern about the status of a customer's order.</td>
</tr>
<tr>
<td>Order Date</td>
<td>The date the order was placed</td>
<td>N/A</td>
</tr>
<tr>
<td>Creation Date</td>
<td>The date and time the order was recorded.</td>
<td>N/A</td>
</tr>
<tr>
<td>Contact</td>
<td>The email address of the contact the order is associated with.</td>
<td>N/A</td>
</tr>
<tr>
<td>Conversion Email</td>
<td>The email that triggered a conversion.</td>
<td>Shows you the email that was clicked before an order was placed.</td>
</tr>
<tr>
<td>Contact Status</td>
<td>The status of the contact the order is associated with. The values can be: Active, Onboarding, Inactive:Transactional, Inactive: Suppressed, Inactive: Bounced, Inactive: Deleted</td>
<td>If the Contact field is n/a, the Contact Status field will show you if the contact has been Suppressed or Deleted.</td>
</tr>
<tr>
<td>Contact ID</td>
<td>The unique ID associated with the contact.</td>
<td>N/A</td>
</tr>
<tr>
<td>Tax Amount</td>
<td>The tax amount passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td>Discount Amount</td>
<td>The discount amount passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The subtotal passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td>Shipping Amount</td>
<td>The shipping amount passed in for the order.</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Order Fields / Order Details

You can view the complete details of an order from both the Orders page and the Contact Details > Orders page by clicking on an Order Id in the Orders table.

**Important:** This topic does not apply to you if you are not using Order Service.

When you click on an Order ID in an Orders table, a snapshot of the order is displayed. To view the complete details for an order, click the Switch to Detailed View button on the Order Snapshot.

This table describes each field in the complete order details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grand Total</strong></td>
<td>The grand total passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Order Id</strong></td>
<td>The order ID represents the unique identifier for a particular order.</td>
<td>The order ID is the unique identifier for an order. This ID is often used to sync this data with another system.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Current status of the order; either Pending or Processed.</td>
<td>The status lets you know if the order has been processed or not, which can be helpful if there is a concern about the status of a customer's order.</td>
</tr>
<tr>
<td><strong>Contact ID</strong></td>
<td>ID of customer who owns the cart. This is a numerical identifier, not a contact's email address.</td>
<td>You can use a Contact ID to search for all of the contact's orders on the Tables &gt; Orders page.</td>
</tr>
<tr>
<td><strong>Ordered</strong></td>
<td>Date and time the order was placed.</td>
<td>This can be used to see how long it has been since an order was placed when troubleshooting issues with a contact's order.</td>
</tr>
<tr>
<td><strong>Created</strong></td>
<td>Date and time the order was recorded.</td>
<td>A large time difference between the Ordered and Created records could point to an issue with your site's ordering system.</td>
</tr>
<tr>
<td><strong>Updated</strong></td>
<td>Date the order was last updated.</td>
<td>This can be used to track activity on an order if there are questions about the status of an order.</td>
</tr>
<tr>
<td><strong>Currency</strong></td>
<td>Currency type; for example, USD (United States Dollar).</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Tax Amount</strong></td>
<td>The tax amount passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Discount Amount</strong></td>
<td>The discount amount passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>The subtotal passed in for the order.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Shipping Details</strong></td>
<td>Shipment tracking details such as the tracking number, carrier, etc.</td>
<td>Shipping details can be passed along to a contact so they can track the shipment.</td>
</tr>
<tr>
<td><strong>Tracking URL</strong></td>
<td>Shipment tracking URL.</td>
<td>Allows you to track a shipment.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Total</td>
<td>The Total located under Shipping is the total cost for shipping.</td>
<td>N/A</td>
</tr>
<tr>
<td>Grand Total</td>
<td>This is the amount a customer was charged for an order. The Grand Total consists of the combined total prices for all items in an order, minus discounts, plus tax and shipping costs.</td>
<td>N/A</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the product, up to 200 characters.</td>
<td>N/A</td>
</tr>
<tr>
<td>Quantity</td>
<td>The number of an individual product in an order.</td>
<td>The quantity is specific to a product in an order. If an order has multiple products in it, the quantity for each product is listed.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the product, up to 10000 characters.</td>
<td>N/A</td>
</tr>
<tr>
<td>Category</td>
<td>Category the product is assigned to.</td>
<td>N/A</td>
</tr>
<tr>
<td>Image URL</td>
<td>URL for the main image for the product.</td>
<td>N/A</td>
</tr>
<tr>
<td>Product URL</td>
<td>URL representing the product page on the website.</td>
<td>N/A</td>
</tr>
<tr>
<td>SKU</td>
<td>A product's stock keeping unit that is unique to the product.</td>
<td>The order ID and SKU ID are the unique identifiers for orders and products. These IDs are often used to sync this data with another system.</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Normal price for the product.</td>
<td>N/A</td>
</tr>
<tr>
<td>Sale Price</td>
<td>If the product is on sale, the sales price for the product.</td>
<td>If the product is not on sale, the sale price will match the unit price.</td>
</tr>
<tr>
<td>Total Price</td>
<td>Price for an individual product in the order without shipping or tax included.</td>
<td>Basically, this is the quantity of a product multiplied by the unit price, or sale price if there is one.</td>
</tr>
<tr>
<td>Other</td>
<td>An alphanumeric field that can be used to pass order data that does not match any of the other order field criteria.</td>
<td>This field is limited to 5,000 characters.</td>
</tr>
</tbody>
</table>

### View All The Workflows In Your Account

This topic describes all of the columns in the Workflows Overview table.

You can view all the workflows you have created in your account by going to Automation > Workflows. On this page, you can view the following information about each workflow in your account:
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the workflow.</td>
</tr>
</tbody>
</table>
| Status | The current status of the workflow. A workflow can have a status of:  

- **Active** - Active workflows are "live" workflows where contacts are moving through them and actions (emails being sent, fields updating, etc.) are being performed.  
- **Inactive** - Inactive workflows do not process contacts and no actions are performed. | Note: Active workflows process contacts (via triggers and filters) and perform actions (send emails, update fields, etc.). Inactive workflows do not process contacts or perform actions. |
<p>| Valid | The Valid column indicates if the workflow is valid. A workflow is valid if all node connections are complete, and all required node properties are set. When saving a workflow, if the workflow is not valid, a warning will be displayed. Invalid workflows can not be activated. Valid workflows can be activated and deactivated as you see fit. |</p>
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Throttling</strong></td>
<td>The <strong>Contact Throttling</strong> column indicates if there are any limits placed on the workflow via the contact throttling settings. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Unthrottled</strong>: Allow contacts to enter the workflow an unlimited number of times, even if the contact is already on the workflow.</td>
</tr>
<tr>
<td></td>
<td>• <strong>New Progressions Disabled</strong>: Do not allow any additional contacts into the workflow. All contacts currently progressing through the workflow will continue to completion.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Limited X</strong>: Limit the number of times a contact may simultaneously be on this workflow to X number of time(s).</td>
</tr>
<tr>
<td></td>
<td>• <strong>Limited X every time frame</strong>: Limit the number of times a contact may enter the workflow to X number of time(s) in a given time frame.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> When this is set it only applies to the current workflow. If a contact is on multiple workflows this will not impact their eligibility for any other workflows.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip</strong>: For more information on using the contact throttling settings in workflows, see Edit The Contact Throttling Settings In A Workflow on page 353.</td>
</tr>
<tr>
<td><strong>Active Contacts</strong></td>
<td>Active contacts on a workflow are contacts moving through the workflow.</td>
</tr>
<tr>
<td><strong>Successful Contacts</strong></td>
<td>Successful contacts on a workflow are contacts who have successfully completed moving through the workflow. A contact successfully completes a workflow when they reach a node or node path in the workflow with no outgoing connection. Workflows can, and often do, have multiple endpoints where a contact can complete the workflow.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip</strong>: For more information on how a contact can successfully complete a workflow, see Successful Workflow Progression on page 396.</td>
</tr>
<tr>
<td><strong>Processed Contacts</strong></td>
<td>Processed contacts on a workflow represent all contacts who have ever entered the workflow. Just because a contact enters a workflow, does not necessarily mean they successfully complete it. Because of this, you may notice a difference between the Processed and Successful counts.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: If a contact enters a workflow 3 times, the number of processed contacts will go up by 3.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Triggered</td>
<td>A date representing the last time the workflow was triggered.</td>
</tr>
<tr>
<td>Activated On</td>
<td>The last date the workflow was made active.</td>
</tr>
<tr>
<td>Last Modified</td>
<td>The last time the workflow was modified or changed.</td>
</tr>
</tbody>
</table>

**Related Topics**

**Workflows** on page 346

Workflows allow you to automate steps of a multi-channel marketing life-cycle by specifying combinations of triggers, filters, and actions that determine how to handle contact data and what marketing communications to send.

**Audit Log**

The Audit Log allows you to see actions that have been performed within your Bronto account.

To view the audit log go to **Reports > Audit Log**. In the log you can see what action occurred, the user name associated with the action, and the date and time the action occurred. While the **Activities** page displays active application processes, the **Audit Log** page displays a historical record of actions that have been triggered by a human interaction with the platform.

**Note:** When you delete a user, the user's actions will continue to be displayed in the audit log but the user's name will no longer be associated with the action.

There are three ways you can filter the data in the audit log:

- To view actions performed by a particular user, enter the login name for the user in the **Username Search** box, and click the **Search** button.
- To view actions performed within a particular date range, click **Show Advanced Options**, use the calender icon and time list to provide a **Starting On** and/or an **Ending On** date and time, then click the **Search** button. You aren't required to supply both dates, but can if you want to view a specific range of time.
- To view actions related to a specific type of platform action, select a type from the **Filter by Type** list. The **Filter by Type** list includes the following types of actions:
  - **Contact** Actions related to creating, editing, and deleting contacts
  - **Message** Actions related to creating, editing, sending, and deleting any kind of message (email, Twitter, SMS, Facebook).
  - **Segment** Actions related to creating, editing, and deleting segments
  - **Fields** Actions related to creating, editing, and deleting fields
  - **List** Actions related to creating, editing, and deleting lists
  - **Workflow** Actions related to creating, changing, activating/deactivating, and deleting workflows.
  - **Import** Record of contact imports that were triggered by the associated user
  - **Export** Record of contact exports that were triggered by the associated user
  - **Site** Actions related to accessing your site.
  - **User** Actions related to creating, editing, or deleting users
  - **Suppression** Record of an email address or domain being added to the suppression list
  - **Automated Message Rule** Actions related to creating, changing, activating/deactivating, and deleting Automated Message Rules.

You can use any one of these filters individually or use all three of them together.

**Activities**

The Activities page displays active application processes.
These processes are divided into currently running processes, Activities, and processes that are scheduled, Recurring. Processes shown on this page include things like running reports, contact imports, list cleaning, delivery group exports, and segment refreshes. When you make a system request, each activity is completed in the order it was requested. Therefore, if you have several activities running it might take some time for all of the requests to complete.

The Activities table lists one-time processes that are currently running. The table shows you the time the process kicked-off, what percentage of the process has completed, and the estimated amount of time that is left before the process completes.

The Recurring table lists all of the processes that are scheduled to run. This table also shows the frequency which the process is run, and the next date and time the process will kick-off. If a scheduled process is currently running, the process appears in both tables.

**Table 5: Recurring Activities Actions**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit</strong></td>
<td>Click the pencil icon (✔️) to edit a recurring activity. You can change the recipients, note, and schedule.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Click the delete icon (🗑️) to remove a recurring activity and prevent it from running again in the future. You will need to confirm your selection before the activity is deleted.</td>
</tr>
</tbody>
</table>

You can use the Activities page to see if a process you started is running and how much longer it might take to complete.

**Dashboards**

The dashboard is where you can view snapshots of information about your account statistics and application functionality.

There are five places in the application where you can find dashboards and, by default, most dashboards display a set of widgets relevant to that area of the application:

- **Home Menu**: By default the Home Dashboard displays widgets that provide an overall view of your account; such as announcements, your delivery calendar, and your sender rating.
• Contacts: By default the Contacts Dashboard displays widgets that provide insight into your contacts, lists, and segments.
• Messages Menu: By default the Messages Dashboard displays widgets that provide insight into your recent delivery and message activity.
• Reports Menu: The Legacy Reports dashboard allows you to quickly access overviews of your account activity. Unlike the other dashboards, the Legacy Reports dashboard cannot be customized. For more information, see Legacy Reports Dashboard on page 801.
• Apps Menu: The Apps Dashboard provides an access point to all of the apps provided through Bronto, including apps developed by third-parties. It does not use widgets and cannot be customized. For more information, see Apps Dashboard on page 1507.

You can customize any dashboard, except for the Reports and Apps Dashboards, by adding or removing widgets. For more information on how to add widgets to dashboards, see Add Widgets To Dashboards on page 1078.

Dashboard Widgets
Bronto provides a library of widgets that you can drag and drop on to dashboards in order to display the information and metrics that matter to you.

We provide dashboard widgets for monitoring sending metrics for everything from single deliveries, to all the deliveries in your account. You can add widgets for allocation usage, deliverability monitoring, viewing your delivery agenda, and much more. You can add any widget to any dashboard to create a completely personalized window into the activity in your account.

Tip: For more information on how to add widgets to dashboards, see Add Widgets To Dashboards on page 1078.

Create New Widget
The Create New dashboard widget allows you to skip platform navigation steps when you want to create something in Bronto.

The widget is displayed on the Home > Dashboard by default.

To use the widget, simply click any of the items in the widget to create a new Bronto asset. For example, click New Field to create a new contact field. You will still need to complete all of the other necessary steps, this simply allows you to get started from the Dashboard page.

Performance Over Time Widget
The Performance Over Time widget displays email message performance and order metrics over a selected period of time.

You can change the time period shown on the widget by clicking and then choosing a time period using the Show Stats For Period list. You can choose:

• Last 7 days
• Last 14 days
• Last 30 days
• Last 60 days
• Last 90 days
Metrics Displayed

The following metrics are displayed on the **Performance Over Time** widget:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the <em>unique conversions</em> that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A <em>unique conversion</em> is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Email Orders</strong></td>
<td>The <em>Email Orders</em> metric represents orders made from emails you sent from the application. These orders are the result of a contact clicking through an email you sent them and then placing an order. These orders have specific emails sent from the application associated with them. When a contact places an order as a result of being sent an email, a conversion is recorded. From a single conversion, multiple orders can be made. It is possible to have more orders than conversions. For example, if a contact clicks from an email to your site, purchases a shirt, and then also decides to purchase a hat, that could represent 2 orders made from 1 conversion.</td>
<td>The Email Orders metrics is important because it allows you to see the number of orders directly tied to your email marketing efforts. Because a contact clicked though an email you sent them from the application, we are able to associate that order with a specific delivery and contact.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Other Orders**| The *Other Orders* metric represents orders that did not directly result from emails you sent from the application. You can pass in order data for contacts that is not associated with a specific delivery. | The *Other Orders* metric is important because it helps to paint a complete picture of your revenue stream. With more complete order data, you can create more targeted segments based on how many orders a contact actually made, rather than just those orders from email.  

**Tip:** You can create segments based on order data associated with a contact. For more information on creating segments based on order data associated with a contact, see [Create A Segment Based On Order Data Stored For Contacts](#) on page 460. |
| **Other Revenue**| The *Other Revenue* metric represents revenue that did not directly result from emails you sent from the application. You can pass in revenue data for contacts that is not associated with a specific delivery. | The *Other Revenue* metric is important because it helps to paint a complete picture of your revenue stream. With more complete revenue data, you can create more targeted segments based on how much revenue is actually associated with a contact, rather than just revenue specifically from email.  

**Tip:** You can create segments based on the *Total Revenue* recorded for contacts in your account. For more information on creating segments based on total revenue, see [Create A Segment Based On The Total Revenue Recorded For Contacts](#) on page 459. |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Orders</strong></td>
<td>The <em>Total Orders</em> metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.</td>
<td>The <em>Total Orders</em> metric allows you to view the total number of orders in your account, rather than just those resulting from email. <strong>Tip:</strong> You can create segments based on order data associated with a contact. For more information on creating segments based on order data associated with a contact, see Create A Segment Based On Order Data Stored For Contacts on page 460.</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>The <em>Total Revenue</em> metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.</td>
<td>The <em>Total Revenue</em> metric allows you to view the total amount of revenue tracked in your account, rather than just the revenue from email. <strong>Tip:</strong> You can create segments based on the <em>Total Revenue</em> recorded for contacts in your account. For more information on creating segments based on total revenue, see Create A Segment Based On The Total Revenue Recorded For Contacts on page 459.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td><strong>Revenue Per Order</strong></td>
<td>The <em>Revenue Per Order</em> metric represents the average revenue generated per order tracked in your account.</td>
<td>The <em>Revenue Per Order</em> metric is important because it gives you an idea of how much contacts are spending, on average, each time an order is made.</td>
</tr>
</tbody>
</table>

**Allocation Usage Widget**

The Allocation Usage widget displays your email, SMS, contact, hosting, and user allocation usage for the current allocation period. You can click ☰ to show and hide each allocation, as well as drag and drop individual allocations to change the order in which they are displayed on the Allocation Usage widget.
For more information on your allocation period and allocation usage, see User Information In Your Account on page 1317.

**Emails**

Displays the number and percentage of emails sent this allocation period. You can also see the breakdown of marketing and transactional sends. If you click **Emails** the Messages Dashboard opens.

For more information on transactional emails, see Transactional Emails on page 294.

You can view metrics for all the marketing and transactional emails sent from your account by viewing the Marketing Deliveries and Transactional Deliveries delivery groups. To view the Marketing Deliveries and Transactional Deliveries delivery groups, go to Messages > Delivery Groups and click either Marketing Deliveries or Transactional Deliveries.

**SMS**

Displays the number and percentage of SMS messages you have sent this allocation period. If you click **SMS Messages**, you will be taken to the All SMS Messages page.

**Contacts**

Displays the number and percentage of active contacts in your account as of the date and time provided. Contact allocation is updated nightly or when a bulk contact import occurs.

If you click **Contacts**, you will be taken to the Contacts Dashboard.

**Hosting**

You can view the total amount and percentage of hosting space used in your account, as compared to your total allocation. If you click **Hosting**, you will be taken to the Hosting page.

**Users**

You can view the number and percentage of users currently in your account, as compared to your total allocation. If you click **Users**, you will be taken to the Users page.
Tip: For more information on creating new users in your account, see Create Users on page 1336.

**Marketing Database Widget**
The **Marketing Database** widget allows you to view the total number of records used in your account.

The **Total Records** metric is a sum of the total number of orders, and total number of contacts in your account. The **Contacts** portion of the chart is further broken down by **Active** and **Inactive** contacts.

Tip:
Active contacts are "live" contacts that can receive marketing emails from you. Inactive contacts cannot receive marketing emails from you. Contacts are designated as active or inactive based on their status.

**Email Usage Widget**
The **Email Usage** widget allows you to view the total number of used and unused emails in your account.

The **Used** emails portion of the chart is further broken down by **Marketing** and **Transactional** emails.
Tip: You can click the Account Usage Details link to view more information about resources used in your account.

Tip: Marketing deliveries are email deliveries sent for marketing purposes, not including Transactional deliveries.

Tip: A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

Outgoing Deliveries Widget
The Outgoing Deliveries widget allows to view the outgoing email deliveries in your account, along with sending metrics for each delivery.

If you click View All Outgoing Deliveries, you will be taken to the Outgoing Deliveries page.
## Metrics Displayed

The following metrics are displayed on the **Outgoing Deliveries** widget:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
</tbody>
</table>

**Announcement And News Widget**

The **Announcement And News** widget allows you to view announcements and news about the application.

You can view blog posts, product updates, and company news. To read more about a given announcement, click Read or the title of the announcement.
**Delivery Calendar Widget**

The **Delivery Calendar** widget allows you to view all sent and scheduled deliveries for the current month.

Days with deliveries scheduled, or sent, will have a mail icon. Click on that day to view information about the deliveries scheduled or sent on that day. You will be shown a light box containing the following information for each delivery:

- An icon representing the type of delivery made (description below).
- The name of the message used in the delivery.

  **Tip:** If you click the message name, you will be taken to **Overview** page for that message.

- The subject line used in the delivery.
- The send time for the delivery.
- The number of contacts the delivery was sent to.
- Metrics for the delivery (description below)
- A link to the delivery report for the delivery.

  **Tip:** For more information on delivery reports, see **Delivery Reports (Legacy)** on page 684.

Below is a description of each of the icons that appear on the **Delivery Calendar** widget.

- Regular Delivery - Represents a regular delivery.
- A/B Split Test Delivery - Represents a delivery sent as part of an A/B split test.

  **Tip:** For more information on setting up an A/B split test, see **A/B Split Tests** on page 321.

- Automated Message Rule Delivery - Represents a delivery sent as part of an Automated Message Rule.
Tip: For more information on automated message rules, see Automated Message Rules on page 419.

- Test Delivery - Represents a test email delivery.
  Tip: For more information on sending test messages, see Message Testing Program.

- View Report - Click this icon to view a delivery report for a delivery.
  Tip: For more information on viewing a delivery report and the metrics contained on a delivery report, see Delivery Reports (Legacy) on page 684 in help.

- View Comparison Report (A/B split deliveries only) - Click this icon to view a comparison report for a delivery made as part of an A/B split test.
  Tip: For more information on viewing Comparison reports, see Comparison Reports on page 756.

Below is a description of the metrics shown for deliveries displayed on the deliveries calendar:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
</tbody>
</table>

**Tip:** You can click **iCal Feed** to download a feed of your calendar. For more information on downloading your calendar feed, see **Subscribe To/Download Your Calendar Feed** on page 345.

**Tip:** You can add a note to the **Delivery Calendar** widget by clicking **Add Note**. For more information on adding note to the calendar, see **Create A Note On The Delivery Calendar** on page 345.

**Tip:** You can view the full delivery calendar by clicking **Full Calendar**. For more information on viewing the full delivery calendar, see **View The Full Delivery Calendar** on page 343.

**Recent Reports Widget**
The **Recent Reports** widget allows you to view the reports that have been recently generated in your account.
Reports can be generated for:

- Lists
- Segments
- Reports:
  - delivery groups
  - workflows
  - automated message rules
  - A/B split tests
  - messages
  - deliveries
- Contact Export reports

**Tip:** Click on the name of any report to download the report to your computer.

**Tip:** Click View All Reports to go to the Report Downloads page. On this page you can view all of the reports generated in your account.

### Email Message Activity Widget

The Email Message Activity widget displays the metrics for a single email message.

To pick which email message's metrics are shown on the widget, click and pick an email message. The following metrics are shown on the Email Message Activity widget:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sent</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
</tbody>
</table>

- **Note:** Deleted email deliveries will still be counted as part of the emails sent metric.
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through</td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see <a href="#">Configure Order Settings</a> on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td>Email Revenue</td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>

**Tip:** Click on the name of the message shown in the Email Message Activity widget to view the full report for the message. For information on viewing a report for a message, see [Report: Overview Metrics (Legacy)](#) on page 702.

**Tip:** Messages and deliveries are not the same thing. For more information on the differences between messages and deliveries, see [Messages](#).
**Delivery Activity Widget**

The Delivery Activity widget displays the metrics for a single delivery.

![Delivery Activity Widget](image)

To pick which deliveries' metrics are shown on the widget, click on and pick a delivery. The following metrics are shown on the Delivery Activity widget:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. Note: Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
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<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
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<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
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<td>Metric</td>
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<td>-----------------------------------------------------------------------------</td>
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<td>Open Rate</td>
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<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
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<tr>
<td>Clicks</td>
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<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
</tbody>
</table>
### Metric | Description | Why It's Useful
--- | --- | ---
**Conversions** | The conversions metric represents the *unique conversions* that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A *unique conversion* is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. **Tip:** In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see *Configure Order Settings* on page 1154. | The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign. |

**Email Revenue** | The *Email Revenue* metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application. | The *Email Revenue* metric is important because it allows you see the revenue that directly ties to your email marketing efforts. |

---

**Tip:** Below the name of the message used in the delivery, you can view the subject line used in the delivery.

**Tip:** Click on the name of the message used in the delivery shown in the *Email Message Activity* widget to view the full for the delivery. For information on viewing a report for a delivery, see *Delivery Reports (Legacy)* on page 684.

**Tip:** Messages and deliveries are not the same thing. For more information on the differences between messages and deliveries, see *Messages*.

**Workflow Activity Widget**
The *Workflow Activity* widget displays the metrics for a workflow.

![Example Workflow](example.workflow.png)

To pick which workflow's metrics are shown on the widget, click and pick a workflow. The following information is shown on the *Workflow Activity* widget:
**Name** | **Description**
--- | ---
Description | The description for the workflow.

**Status** | Description
--- | ---
The current status of the workflow. A workflow can have a status of:
- **Active** - Active workflows are "live" workflows where contacts are moving through them and actions (emails being sent, fields updating, etc.) are being performed.
- **Inactive** - Inactive workflows do not process contacts and no actions are performed.

**Note:** Active workflows process contacts (via triggers and filters) and perform actions (send emails, update fields, etc.). Inactive workflows do not process contacts or perform actions.

**Last Modified** | The last time the workflow was modified or changed.

The following metrics are shown on the **Workflow Activity** widget:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
</table>
| **Sent** | The emails sent metric represents the total number of emails that were sent.  
**Note:** Deleted email deliveries will still be counted as part of the emails sent metric. | The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered. |
<p>| <strong>Delivery Rate</strong> | The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate | The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you. |
| <strong>Delivered</strong> | The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted | The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent. |</p>
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Opens</td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Clicks</td>
<td>The clicks metric is a per contact metric that represents the unique clicks recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td>Metric</td>
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</tr>
<tr>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
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<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>

**Tip:** Beneath the name of the workflow, you can view the Description, Status, and Last Updated date for the workflow.

**Tip:** Click on the name of the workflow shown in the *Workflow Activity* widget to view the full report for the workflow. For information on viewing a report for a workflow, see [Workflow Report Overview Metrics](#).

**Tip:** For more information on creating workflows see [Workflows](#) on page 346.

**Automated Message Rule Activity Widget**

The *Automated Message Rule Activity* widget displays the metrics for an automated message rule.

![Automated Message Rule Activity](image)

To pick which automated message rule's metrics are shown on the widget, click and pick an automated message rule. The following metrics are shown on the *Automated Message Rule Activity* widget:
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
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<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion Rate</td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
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<tr>
<td>Conversions</td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
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<td>Email Revenue</td>
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<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>

**Tip:** Click on the name of the automated message rule shown in the Automated Message Rule Activity widget to view the full report for the automated message rule. For information on viewing a report for an automated message rule, see Automated Message Rule Report Overview Metrics.

**Tip:** For more information on automated message rules, see Automated Message Rules on page 419.
Recently Edited Messages Widget
The Recently Edited Messages widget displays the messages in your account that have most recently been edited.

Click on the name of the message to view more information about the message. The icons next to the message represent the type of message. The icons are explained below:

- Represents an email message.
- Represents an SMS message.
- Represents a Twitter message.
- Represents a Facebook message.

Tip: Below the message name, you can view the last date and time the message was edited.

Tip: Click View All Messages to view all the messages in your account.

Recent Email Replies Widget
The Recently Emails Replies widget displays the replies you have received in your account.

For each reply, you can view the type and the date/time when the reply was received.

Each type of reply is described below:

- Automated - These are replies classified as automated and are usually automated vacation of OOO (out of office) replies.

Tip: If you are receiving a large number of automated replies or just don't want to deal with them, you can choose to automatically delete automated email replies. For information on automatically deleting automated email replies, see Automatically Delete Automated Email Replies on page 1351.
- **Unsubscribe** - These are replies classified as unsubscribe requests.
  
  **Tip:** We allow you to specify keywords found in reply subject lines which when found, will automatically unsubscribe the contact. For information on automatically handling unsubscribe requests, see *Automatically Handle Email Unsubscribe Requests* on page 1351.

- **Spam** - These are replies determined to be spam by our spam filtering software.

  **Tip:** We allow you automatically delete any replies determined to be spam. For more information on automatically deleting replies determined to be spam, see *Filter Out Email Replies Determined To Be Spam* on page 1351.

- Normal reply (no icon shown for normal replies)

  **Tip:** Click *View All Replies* to view all the replies in your account. For more information on viewing all the replies in your account, see *Email Replies* on page 317.

  **Tip:** For more information on configuring the replies settings in your account, see *Email Reply Settings* on page 1350.

**Contacts Snapshot Widget**

The **Contacts Snapshot** widget displays total contact counts for contacts in your account at the time the widget was loaded.

![Contacts Snapshot](image)

You can reload the page if you want to update the counts in the widget. The **Contacts Snapshot** widget displays counts for the following types of contacts:

- **All Contacts** - This is a combination of the Active and Inactive contacts in your account. If you click on **All Contacts**, the **Search Contacts** page will open. See *Search For Contacts In Your Account* on page 896 for more information about how to use this page.
- **Active** - Contacts with a status of Active are contacts that can receive emails from you.
- **Inactive** - Inactive contacts cannot receive messages from you. Inactive contacts are given one of three statuses:

  - **Bounce** - Contacts with a status of Bounce cannot be sent emails because they have hard bounced due to a bad email address, or they have exceeded the bounce limit set for your account.

    **Tip:** For more information on bounced messages, see *Email Bounce* on page 196.

  - **Unconfirmed** - Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you in order for you to send to them. One way to move Unconfirmed contacts to Active status is to send them an email that includes a **Subscription Confirmation webform** which will allow them to...

  - **Unsubscribed** - Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.
**Tip:** We do provide a way for you to reactivate inactive contacts. For more information on reactivating inactive contacts, see Reactivate Inactive Contacts on page 1404.

- **Sending Max** - The Sending Max represents the maximum number of contacts with a status of Onboarding that you can currently send to. For a detailed explanation of how the Sending Max is calculated, see Automated Onboarding on page 1081.
- **Currently Onboarding** - Onboarding contacts are new contacts who are waiting to be sent their first email from you. Once they are sent the first email, they will enter the assessment phase of the automated onboarding process and move from Onboarding to Awaiting Assessment.
- **Awaiting Assessment** - After a contact has been sent their first email, they enter the assessment phase of the automated onboarding process, and hence move from Onboarding to Awaiting Assessment. After a contact has been assessed, they will move from Awaiting Assessment to Active. You can send to contacts while they are in the waiting assessment period and there is no limit on the number of sends allowed for a contact.

**Recently Targeted Lists Widget**
The **Recently Targeted Lists** widget displays the lists that have been recently sent to in a delivery.

You can view the name of the list and the number of contacts currently on the list.

![Recently Targeted Lists](image)

**Tip:** Click on the name of the list to view more information about the list. You will be taken to the List Overview page for that list. For more information on using the List Overview page, see List Overview Page on page 540.

**Tip:** Click Create New List to create a new list. For more information on creating lists, see Create A List on page 534.

**Tip:** Click View All Lists to view all the lists in your account. For more information on viewing all the lists in your account, see Lists on page 533.

**Recently Targeted Segments Widget**
The **Recently Targeted Segments** widget displays the segments that have been recently sent to in a delivery.

You can view the name of the segment and the number of contacts currently on the segment.

![Recently Targeted Segments](image)

**Tip:** Click on the name of the segment to view more information about the segment. You will be taken to the Segment Overview page for that segment. For more information on using the Segment Overview page, see Segment Overview Page on page 499.

**Tip:** Click Create New Segment to create a new segment. For more information on creating segments, see Segment Builder on page 435.

**Tip:** Click View All to view all the segments in your account. For more information on viewing all the segments in your account, see View All The Segments In Your Account.

**List Activity Widget**
The **List Activity** widget displays information and sending metrics for a single list.
To pick which list's metrics are shown on the widget, click and pick a list. The following information is displayed below the list's name:

- **External Name** - The external name is the name that will appear to your contacts if you make this list visible on a webform.
- **Total Contacts** - The total number of contacts currently on the list.
- **Description** - Displays the description provided when the list was created.
- **Created** - Displays the date the list was created.

The following metrics are shown on the **List Activity** widget:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td></td>
</tr>
<tr>
<td><strong>Average Delivery Rate</strong></td>
<td>The average delivery rate represents an average of the individual delivery rates for each delivery sent to a list or segment.</td>
<td>The average delivery rate is important because it gives you an indication on the relative health of the list or segment. If the average delivery rate is low, then contacts on the list or segment are not receiving emails you send them.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on the delivery rating for a delivery, see Sender and Delivery Rating on page 309.</td>
<td></td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Delivered</td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it let's you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td>Average Open Rate</td>
<td>The average open rate represents an average of the individual open rates for each delivery sent to a list or segment.</td>
<td>The average open rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. The average open rate lets you see out of all the contacts on the list or segment who received the email you sent, who actually took the time to open it.</td>
</tr>
<tr>
<td>Opens</td>
<td>The opens metric represents the unique opens. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: Unique Renders</td>
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</tr>
<tr>
<td>Average Click Rate</td>
<td>The average click rate represents an average of the individual click rates for each delivery sent to the list or segment.</td>
<td>The average click rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. The average click rate gives you an indication of how effective the emails you sent to the list or segment were at getting the contacts who opened the emails to click the links contained therein.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
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</tr>
<tr>
<td>Average Conversion Rate</td>
<td>The average conversion rate represents an average of the conversion rates for each delivery sent to the list or segment.</td>
<td>The average click rate is important because it gives you insight into the effectiveness and contact engagement level of a list or segment. Whether it's making a purchase or downloading a whitepaper, the ultimate goal of email marketing is to compel your contacts to perform an action.</td>
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<td>The <em>Email Revenue</em> metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
</tbody>
</table>
Email Addresses By Domain Widget
The Email Addresses By Domain widget displays a pie chart showing a graphical representation of the email domains used by the contacts in your account.

Tip: Click View Contact Performance By Domain Report to view the a more detailed report on contact performance by domain. For more information on using the View Contact Performance By Domain Report report, see Contact Performance By Domain Report on page 811.

Contact Growth Over Time Widget
The Contact Growth Over Time widget displays how the number of contacts in your account has fluctuated over a given time period.

This widget is extremely useful for comparing metrics, such as conversions, against the change in contact growth over time. For example, if you have increased your contacts by 1,000 each month for the past 5 months, and the number of conversions has decreased over the same 5 month period, then you probably need to go back and review the content of your message and who you are sending to. You can also change the settings in the widget to view contact unsubscribes overtime.

To change the time period shown on the Contact Growth Over Time widget:

1. Move your mouse over the Contact Growth Over Time widget.
2. Click Settings.
3. Select a time period from the pull-down menu. You can select:
   - Last 7 days
   - Last 14 days
   - Last 30 days
   - Last 60 days
   - Last 90 days
4. Click Select.
To view the contact unsubscribes overtime:

1. Move your mouse over the **Contact Growth Over Time** widget.
2. Click **Settings**.
3. Select **Contact Unsubscribes Over Time** from the **Chart Type** pull-down menu.
4. Select a time period from the pull-down menu. You can select:
   - Last 7 days
   - Last 14 days
   - Last 30 days
   - Last 60 days
   - Last 90 days
5. Click **Select**.

**Tip:** Click **View Full Report** to view the full Contact Growth Over Time report. For more information on using the Contact Growth Over Time report, see **Contact Growth Over Time Report** on page 809.

**Delivery Agenda Widget**
The **Delivery Agenda** widget displays recent deliveries, upcoming deliveries, and notes for a multi-week period.
For deliveries scheduled to go out in the future, you will be shown:

- An icon representing the type of delivery to be made (description below).
- The name of the message to be used in the delivery.

  **Tip:** If you click the message name, you will be taken to **Overview** page for that message.
- The send time for the delivery.

For deliveries that have already been sent, you will be shown:

- An icon representing the type of delivery made (description below).
- The name of the message used in the delivery.

  **Tip:** If you click the message name, you will be taken to **Overview** page for that message.
- The subject line used in the delivery.
- The send time for the delivery.
- The number of contacts the delivery was sent to.
- Metrics for the delivery (description below)
- A link to the delivery report for the delivery.

  **Tip:** For more information on delivery reports, see **Delivery Reports (Legacy)** on page 684.

To edit the settings in the Delivery Agenda widget:

1. In the **Delivery Agenda** widget, click the settings icon.
2. **Optional:** Use the **Sort Order** pull-down menu to select how the deliveries in the widget are sorted. You can select:
   - Descending
   - Ascending
3. **Optional:** Use the **Past Deliveries** pull-down menu to select the time frame used to show deliveries made in the past. You can select:
   - Last 7 Days
   - Last 14 Days
   - Last 30 Days
   - Last 60 Days
   - Last 90 Days
4. **Optional:** Use the **Future Deliveries** pull-down menu to select the time frame used to show deliveries scheduled to be sent. You can select:
   - Next 7 Days
5. Click **Select**.

Below is a description of each of the icons that appear on the mini and full Delivery Calendars.

- **Regular Delivery** - The envelope icon represents a regular delivery on the mini calendar. If more than one delivery is occurring on an individual day, you can move your mouse over the regular delivery icon on the mini calendar to reveal the rest of the deliveries scheduled for that day. The dot represents a regular delivery on the full calendar. You will notice the dots are different colors. The colors correspond to the campaign that the delivery belongs to.

- **A/B Split Test Delivery** - Represents a delivery sent as part of an A/B split test.

- **Automated Message Delivery** - The envelope icon represents a delivery sent as part of an Automated Message Rule on the mini calendar. The dot represents a delivery sent as part of an Automated Message Rule on the full calendar. You will notice the dots are different colors. The colors correspond to the campaign that the delivery belongs to.

- **Test Delivery** - The envelope icon with **test** on it represents a test delivery on the mini calendar.

  **Tip:** For more information on sending test messages, see **Message Testing Program**.

- **View Report** - You can click this icon to view a report for a delivery.

- **View Comparison Report (A/B split deliveries only)** - You can click this icon to view a comparison report for a delivery made as part of an A/B split test.

- **Subscribe to iCal** - Allows you to subscribe to a feed of your calendar.

- **The Current Day** - Marks the current day on the mini Delivery calendar.

Below is a description of the metrics shown for deliveries displayed on the deliveries calendar:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Rate</td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: <em>Accepted Rate</em></td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Click Rate</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
</tbody>
</table>
### Metric

**Conversion Rate**

<table>
<thead>
<tr>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
</tbody>
</table>

### Tip:
- You can click **iCal Feed** to download a feed of your calendar. For more information on downloading your calendar feed, see [Subscribe To/Download Your Calendar Feed](#) on page 345.
- You can add a note to the **Delivery Calendar** widget by clicking **Add Note**. For more information on adding note to the calendar, see [Create A Note On The Delivery Calendar](#) on page 345.
- You can view the full delivery calendar by clicking **Full Calendar**. For more information on viewing the full delivery calendar, see [View The Full Delivery Calendar](#) on page 343.

### Delivery Group Activity Widget

The **Delivery Group Activity** widget displays the information and sending metrics for a single delivery group.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sent</strong></td>
<td>The emails sent metric represents the total number of emails that were sent. <strong>Note:</strong> Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Delivery Rate</strong></td>
<td>The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: Accepted Rate</td>
<td>The delivery rate metric is important because it represents the first step in determining the success of your email marketing efforts. In order for contacts to open, click, and eventually convert, they first have to receive an email from you.</td>
</tr>
<tr>
<td><strong>Delivered</strong></td>
<td>The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted</td>
<td>The Emails delivered metric is important because it lets you know how many total emails were successfully delivered. Once you know how many emails were successfully delivered, you can begin further evaluating the levels of contact engagement (opens, clicks, conversions). You can also figure out how many unsuccessful emails were sent.</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
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<td>Metric</td>
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</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Opens</strong></td>
<td>The opens metric represents the <em>unique opens</em>. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: <em>Unique Renders</em></td>
<td>The opens metric is important because it represents the first level of contact engagement. Although you can't actually tell what your contacts are doing with the email you sent them, you can at least tell that they were interested enough to open it. A high number of opens is usually indicative of a strong subject line and a trusted from name, since these are the only things a contact can see in their inbox before actually opening the email you sent them.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Clicks</strong></td>
<td>The clicks metric is a per contact metric that represents the <em>unique clicks</em> recorded. A <em>unique click</em> is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: <em>Click Through</em></td>
<td>The clicks metric is important because it represents a level of contact engagement beyond just opens, and begins to highlight the effectiveness of the content contained in your emails. With clicks, you can tell how many contacts were interested enough to open and then click the links contained in the email you sent them.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
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</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Conversions</strong></td>
<td>The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed. If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded. <strong>Tip:</strong> In order to track conversions, you need to set up the Orders Service. For more information on setting up the Orders Service, see Configure Order Settings on page 1154.</td>
<td>The conversions metric is extremely important because at the end of the day, the reason you send email marketing messages is to compel your contacts to perform an action. Opens may tell you if the subject line is well written, and clicks may tell you how engaging the content is, but conversions tell you if your contacts are actually performing the action that is the goal of your email marketing campaign.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The Email Revenue metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The Email Revenue metric is important because it allows you see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The Revenue Per Email metric represents the average revenue tracked for emails sent as part of deliveries added to a delivery group. It is calculated by dividing the Email Revenue metric by the Sent number.</td>
<td>The Revenue Per Email metric is important because it allows you to see how much revenue emails sent via deliveries add to a delivery group are generating on average.</td>
</tr>
</tbody>
</table>
Tip: Click on the name of the delivery group shown in the Delivery Group Activity widget to view the full report for the delivery group. For information on viewing a report for a message, see Delivery Group Reports on page 688.

Tip: For more information on creating delivery groups, see Create A Delivery Group on page 599.

Deliverability And Sending Rating Widget
The Deliverability And Sender Rating widget displays the metrics related to things that effect your sender rating.

The Deliverability And Sender Rating widget displays the following metrics:

- **Deliverability Rate** - The deliverability rate metric represents the average number of sent emails that are successfully delivered to your contacts. Another way to look at it is as the average of all the delivery rates for all the email deliveries in your account.
- **30-Day Average** - The 30 day average metric is a 30 day average of your deliverability rate.
- **Sender Rating** - Your email sender rating provides quantitative insight into the quality of your lists and emails. The rating is driven by complaints your emails receive from ISP feedback loops, the level of engagement (opens, clicks, conversions) you have with your contacts who receive emails from you, and internal measurements that we use to help you optimize your deliverability. We do not publish our internal measurement thresholds, or our formula for determining your sender rating, because they are subject to change. As the email deliverability landscape continues to evolve (ISP thresholds change, feedback loops become more widely available, etc.), we must continually re-factor our internal measurements and thresholds for optimal deliverability.

Tip: For more information on the deliverability rate and how it is calculated, see Deliverability Rate Metric on page 866.

Tip: For more information on your sender rating and delivery rating, see Sender and Delivery Rating on page 309.

Tip: Click View History to view the a historical report for the sender rating in your account. For more information on viewing the Sender Rating Over Time report, see Sender Rating Over Time Report on page 813.

Search Widget
The Search widget allows you to add a search box shortcut to dashboards that allows you to search email messages and contacts.

To use the search widget:

1. Add the Search widget to a dashboard.
2. Move your mouse over the Search widget.
3. Click.
4. Click the checkbox next to the type of search box you want to appear on the widget. You can select:
• Email Messages
• Contacts

5. Click **Save Changes**.

6. For contact searches only:
   a. Using the Email pull-down menu, select how you want to search for contacts. You can search by email address, mobile number, or any field you have created in your account.
   b. Only if you select to search by Email or Mobile Number: Using the **Exactly** pull-down menu, select how you'd like to optimize your search. You can select:
      • *Exactly* - This is the best option if you need to quickly find a contact and already know what their email address is.
      • *Starts with* - This is the best option if you know what a contact's email address starts with, but aren't sure of the ending or the domain used. You can also use this option to perform grouped searches (e.g. I want all contacts whose email address starts with j ).
      • *Contains* - This is the best option if you only know part of the email address or need to do a group search. For example, you could search for all email addresses that contain gmail.com.

7. For contact searches only:
   a. Add a search term in the search text box.
   b. Click **Search email messages** if you are search for email messages or **Search contacts** if you are searching contacts.

**Email Volume Widget**
The **Email Volume** widget displays the recent (past five months) email sending volume and allocation replenish date for your account.

![Email Volume Widget Image](image)

**Tip:** Click **View Full Report** to view the Cumulative Email Volume Over Time report for your account. For more information on the using the Cumulative Email Volume Over Time report, see **Cumulative Email Volume Over Time Report** on page 802.

**Folders Widget**
The **Folders** widget displays the folders you have created in your account.
Dashboard Customization

You can add customizable widgets to the dashboards in the application.

We provide you a library of widgets that you can drag and drop onto dashboards and use to display the information and metrics that matter to you. We provide dashboard widgets for monitoring sending metrics for everything from single deliveries to all the deliveries in your account. You can add widgets for allocation usage, deliverability monitoring, viewing your delivery agenda, and much more. You can add any widget to any dashboard to create a completely personalized window into the activity in your account.

Add Widgets To Dashboards

You can add any widget to any dashboard to create a completely personalized window into the activity in your account.

To add widgets to a dashboard:

1. Navigate to a dashboard.
2. Click Add Widgets. The Widget Palette will appear.
3. Navigate through the Widget Palette until you find the widget you want to add.
   To navigate around the Widget Palette, click the circles on the bottom of the palette.
4. When you find a widget you want to add click on the widget and then drag-and-drop the widget onto the dashboard.
Bronto provides a library of widgets that you can drag and drop on to dashboards in order to display the information and metrics that matter to you.

**Change The Column Layout On Customizable Dashboards**

You can arrange dashboard widgets in one, two, or three column layouts. Widgets will automatically re-size themselves to conform to the column layout you have choose.

To change the column layout:

1. Navigate to a dashboard.
2. Next to the **Add Widgets** or **Hide Palette** link, choose a column layout. You can choose:
   - One
   - Two
   - Three

**Expand Or Collapse Widgets**

You can expand and collapse widgets added to dashboards.

This is convenient if you have a lot of widgets to a dashboard.

To expand or collapse a widget:

1. Navigate to a dashboard.
2. Move to the cursor widget you want to expand or collapse.
3. Click the expand/collapse button.

**Change The Background And Outline Color On Widgets**

You can customize the background/outline color on all dashboard widgets.

To change the background/outline color on widgets:
1. Navigate to a dashboard.
2. Move your cursor over the dashboard you want to change colors for.
3. Click the Color Palette icon.
4. Select the color you want to use.

**View Help Documentation For A Dashboard Widget**
Each dashboard widget has a context sensitive help icon you can use if you need help using a widget or aren't sure what information is shown on a particular widget.

To view the documentation for a widget:
1. Navigate to a dashboard.
2. Move your cursor over the widget you want to view documentation for.
3. Click the Help icon.

**Remove Widgets From Dashboards**
In addition to adding any widget to any dashboard, you can also remove any widget from any dashboard.
This may come in handy if you want to remove the default widgets added to dashboards.

To remove widgets from dashboards:
1. Navigate to a dashboard.
2. Move your cursor over the dashboard you want to remove.
3. Click the X in the top right corner of the widget.

---

**Import**

Import Knowledge Base topics explain how to get data into Bronto - except for data you plan to import using a connector, the API, or the connections center.

Information on using a connector or connections center can be found in the Integrate topics. Information on using the API can be found on dev.bronto.com.

**Contact Imports**

The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

Importing contacts is how you add a contact to your account. The first time a contact is imported, the contact goes through an automated onboarding process that helps verify the validity of the contact data. See Automated Onboarding on page 1081.

Contact import can also be used to create new lists, update contact information, update people who have unsubscribed from outside the application, and/or remove contacts from a list entirely.

Additional import considerations:
- You are asked to identify the character set encoding used in your file when you configure your import.
- We automatically add new contacts to appropriate segments. If your segment count does not automatically reflect what you think should be the correct number, click the "refresh" icon to refresh your segment.
- If the contact list contains message preferences (i.e. they want to receive either HTML or text messages), you can import this data by adding a column called "message preference" to the list and then specifying "text" or "html" for each contact on the list.
• When finished, a small window pops up at the top of your screen indicating that your activity (Import, Export, etc.) has completed. Often, there is a link inside the window that leads directly to the page to view information about the relevant action, e.g. the report download page.

• If a contact on the import list already exists in your account and has a status of transactional, their status will be switched to onboarding if you choose Update existing contacts, Add new contacts or Update existing contacts.

After you run an import, you can view the details of the contact import by going to Reports > Report Downloads and clicking on a Report Name in the Contact Import Report Downloads table to download a contact import report. For more information see Legacy Report Downloads Page on page 820.

Related Topics
Automated Onboarding on page 1081
Automated onboarding is a simple process that allows you to quickly add contacts to your account, while mitigating the risk of these contacts negatively affecting sending in your account.

Legacy Report Downloads Page on page 820
The Report Downloads page is where you can access and download reports you have run or reports related to your contact import activity. You can access this page by going to Reports > Legacy Downloads.

Contact Fields on page 558
Contact fields are data containers that you can use to save information about your contacts.

Search For Contacts In Your Account on page 896
Clean Contacts on page 1399

Related Topics
Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Automated Onboarding
Automated onboarding is a simple process that allows you to quickly add contacts to your account, while mitigating the risk of these contacts negatively affecting sending in your account.

Importing/adding new contacts is often a risky proposition and could have a negative impact on your email deliverability, email delivery ratings, and your sender rating. Because of this risk, Bronto developed the automated onboarding process to assess the legitimacy of new contacts as you send to them for the first time. This is a seamless process that should not disrupt your day-to-day email marketing efforts, as long as the contacts that you onboard have no negative impact on your account.

Automated onboarding is an email-centric process and is only used to assess contacts who you have an email address for. If you have the potential to send emails to a contact and they have not double opted-in to receiving email messages from you, or they have a status of Transactional, the contact is run through the automated onboarding process the first time you send an email to them. Contacts who you only have Facebook, Twitter, or SMS information for are not run through the automated onboarding process.

When contacts are imported into Bronto, they are automatically given the status of Onboarding, unless an imported contact already has an Inactive status that is imported with them. Contacts continue to have the Onboarding status until you send them their first marketing email. When contacts are sent a marketing message for the first time, they enter a 48 hour assessment period that Bronto uses to monitor each contact in order to determine if they will have a negative impact on your account.

All contacts who are being assessed are moved from Onboarding to Awaiting Assessment for a 48 hour period. During the assessment period, Bronto monitors the send for contact loss activity including complaints, unsubscribes, and bounces. At the end of the 48 hour period, any contact who triggered a complaint, unsubscribe, or bounce is given an Inactive status. All other contacts become Active contacts. For more information about statuses, see Contact Status on page 1083. Engagement metrics, such as opens or clicks, are collected and reported for the contacts while they're being assessed but they are not used in the assessment. If Active contacts are included in the delivery, they are not affected by onboarding.
Note: You can still send other emails to contacts while they are Awaiting Assessment and engagement metrics will be collected for these sends.

The number of contacts you can include in an assessment is determined by your Sending Max. The Sending Max represents the maximum number of contacts with a status of Onboarding that you can currently send to. Initially, you can send to a maximum of 100,000 contacts who have an Onboarding status.

Note: Customers who joined Bronto before November 2015 have an initial Sending Max of 55,000.

Your Sending Max is increased or decreased based on a combination of the success of the previous assessment and on your Sender Rating. If the assessment did not have a negative impact on your account, Bronto increases the number of Onboarding contacts you can send the next email delivery to. If the assessment indicates that sending to these contacts will have a negative impact on your account, Bronto decreases the number of Onboarding contacts you can send email to on the next delivery. For example:

• Your Sender Rating was 10. You send to your full Sending Max and your Sender Rating remains 10 after the contacts have completed assessment. In this instance, your Sending Max will be increased to 5 times your previous Sending Max.
• Your Sender Rating was 6. You send to your full Sending Max and your Sender Rating remains 6 after the contacts have completed assessment. In this instance, your Sending Max will remain the same.
• Your Sender Rating was 1. You send to your full Sending Max and your Sender Rating remains 1 after the contacts have completed assessment. In this instance, your Sending Max will be half of previous Sending Max.

Bronto continues to increase or decrease your Sending Max after each assessment until all contacts are assessed. The lowest possible Sending Max is 50,000.

Over time, as your assessment activity dies down, the Sending Max will return to its default number. Bronto does this to essentially “reset” the automated onboarding system and prepare your account for the next import you perform.

You can view your current Sending Max on the Contact Snapshot widget.

If you attempt to send to more Onboarding contacts than the Sending Max allows, Bronto randomly selects the maximum number of Onboarding contacts from the group and puts those contacts through the 48 hour assessment process. Any Onboarding contacts that you attempted to send to that are in excess of your limit are skipped for this send. You can view the number of skipped contacts for an email delivery by going to a delivery report and viewing the onboarding (skipped) metric. For more information on the onboarding (skipped) metric, see Onboarding (Skipped) Metric on page 881. For more information on delivery reports, see Delivery Reports (Legacy) on page 684.

Note: The Sending Max does not apply to contacts with an Active status. If you send to a mix of Onboarding and Active contacts, all Active contacts will be sent to.

If you need to onboard more contacts than your Sending Max allows, you can run another group of Onboarding contacts through the assessment process by sending a marketing message to them after the previous group of contacts have moved out of Awaiting Assessment. You can easily manage onboarding by:

• Creating a segment of contacts who have an Onboarding status and send your deliveries to this segment until every contact is assessed. See Create A Segment Based On Contact Status on page 447.
• Creating a segment of contacts who's total sent emails equal 0 and send your deliveries to this segment until every contact is assessed. See Create A Segment Based On The Number Of Emails Sent To Contacts on page 485.
• Creating a list of contacts who were skipped due to onboarding and send to that list. You can identify and add these contacts to a list from the delivery report. For more information see Add Contacts From A Report To A List on page 853.

Related Topics
Onboarding (Skipped) Metric on page 881
The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time.

Create A Segment Based On Contact Status on page 447
Create A Segment Based On The Number Of Emails Sent To Contacts on page 485
Add Contacts From A Report To A List on page 853

Related Topics
Sender and Delivery Rating on page 309
Your sender rating and email delivery ratings provide quantitative insight into the quality of your lists and emails and can be effected by email complaints.

Contact Status
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Depending on a contact's status, a contact is considered either active or inactive. Active contacts are “live” contacts that can receive marketing emails from you. Inactive contacts cannot receive marketing emails from you. Contacts are designated as active or inactive based on their status.

The following contact statuses are associated with active contacts:

- **Active** - Contacts with a status of Active are contacts that can receive emails from you.
- **Onboarding** - Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.

  **Tip:** For more information on automated onboarding, see Automated Onboarding on page 1081.

The following contact statuses are associated with Inactive contacts:

- **Transactional** - Contacts with a status of Transactional can only be sent transactional emails. A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices. For more information on Transactional Emails, see Transactional Emails on page 294.

- **Unsubscribed** - Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.

- **Bounce** - Contacts with a status of Bounce cannot be sent emails because they have hard bounced due to a bad email address, or they have exceeded the bounce limit set for your account.

  **Tip:** For more information on bounced messages, see Email Bounce on page 196.

- **Unconfirmed** - Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you in order for you to send to them. One way to move Unconfirmed contacts to Active status is to send them an email that includes a Subscription Confirmation webform which will allow them to.

Related Topics
Contact Fields on page 558
Contact fields are data containers that you can use to save information about your contacts.

Contact Imports on page 1080
The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

Search For Contacts In Your Account on page 896

Clean Contacts on page 1399

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Upload Contact Files

The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

Importing contacts is how you add a contact to your account. The first time a contact is imported, the contact goes through an automated onboarding process that helps verify the validity of the contact data. See Automated Onboarding on page 1081.

Contact import can also be used to create new lists, update contact information, update people who have unsubscribed from outside the application, and/or remove contacts from a list entirely.

Additional import considerations:

• You are asked to identify the character set encoding used in your file when you configure your import.
• We automatically add new contacts to appropriate segments. If your segment count does not automatically reflect what you think should be the correct number, click the "refresh" icon to refresh your segment.
• If the contact list contains message preferences (i.e. they want to receive either HTML or text messages), you can import this data by adding a column called "message preference" to the list and then specifying "text" or "html" for each contact on the list.
• When finished, a small window pops up at the top of your screen indicating that your activity (Import, Export, etc.) has completed. Often, there is a link inside the window that leads directly to the page to view information about the relevant action, e.g. the report download page.
• If a contact on the import list already exists in your account and has a status of transactional, their status will be switched to onboarding if you choose Update existing contacts, Add new contacts or Update existing contacts.

After you run an import, you can view the details of the contact import by going to Reports > Report Downloads and clicking on a Report Name in the Contact Import Report Downloads table to download a contact import report. For more information see Legacy Report Downloads Page on page 820.

Import Contacts Contained In A CSV File

You can use CSV files to import contact data into Bronto.

Imported CSV files can include comment rows. Comments begin with a # symbol. This symbol denotes that entire row as a comment. Before you import a file, make sure your file is properly formatted.

Note: Your entire application session, including file upload transfer, is secure provided you have enabled TLS Security. To enable TLS Security, go to Home > Settings > Security and click the Require secure login session using TLS checkbox in the Session Security section.

If you want to import an Excel file, you must save it as a CSV or tab delimited file. To do this, choose "Save As" in Excel to save your file in a supported format - either CSV or tab delimited. We do not support Excel file imports.

To import from a .CSV file:

1. Go to Tables > Contacts > Manage.
2. Click Import.
3. Click the checkbox in the Certify List Compliance section to acknowledge you have read and agree to our terms of service/permission marketing policy.
4. Identify the source of the contacts you are importing in the Where did you obtain these contacts from text box.
   
   If a source is provided, it will appear on the Contact Details page for that contact. For more information, see Contact Details General Information on page 911.
5. Click Next.
6. Click the Import from a CSV file or files radio button.
7. Click Choose File.
8. Select the file you want to import.
9. Click Open.
10. Optional: Click the First row of file(s) is header row checkbox if you want the first row in the file to be the header.
11. Select a character set encoding type to apply to your contact import files from the **Character Set** list.

The character set selected must match the character set used in your file(s) or your contact data will not be processed correctly. Also, all of the files in a single import must use the same encoding. If you're not sure what to select here, you have the option of selecting **I don't know my character set**. When you select **I don't know my character set** Bronto will attempt to import and validate the imported data as UTF-8. If Bronto determines that the file was not using UTF-8, the platform will then import the file(s) using ISO-8859-1 (Latin 1). This does not guarantee the files are using the ISO-8859-1 (Latin 1) character set. You should look at the contact data you imported to make sure it was stored as expected. Pay particularly close attention to any special characters your data may have, such as é.

For more information see **Contact Import Character Sets** on page 1096.

12. Click **Next**.

13. Choose what you want to do with the contacts once they are imported into your account.

   Each option is described below:

   - **Update existing contacts, Add new contacts** adds any new contacts to your account and updates any field for contacts who already exist in your account. No existing email addresses will be changed or updated. This is a good option when your list contains a mix of existing and new contacts.
   - **Add new contacts** adds any new contacts to your account. This option does not affect existing contacts in any way.
   - **Update existing contacts** updates the field data for any contacts who already exist in your account. No existing email addresses will be changed or updated.
   - **Unsubscribe both new and existing contacts** gives any new contacts being added during this import a status of unsubscribed. It will also change the status of any existing contacts affected by this import to unsubscribed.
   - **Unsubscribe existing contacts** unsubscribes all of the contacts who already exist in your account.

   **Note:** Skip to the last three steps in the import process if you select this option.

   - **Remove existing contacts** deletes all of the contacts who already exist in your account.

   **Note:** Skip to the last three steps in the import process if you select this option.

   If a contact on the import list already exists in your account and has a status of **transactional**, their status will be switched to **onboarding** if you choose **Update existing contacts, Add new contacts** or **Update existing contacts**.

   For more information on each type of contact status, see **Contact Status** on page 1083.

14. If your import includes updating existing contacts, select the **Existing transactional contacts remain transactional** box if you do not want the import to change the status of transactional contacts.

   If you do not select this box, contacts with a transactional status are automatically moved from transactional to onboarding status. Unless your import is meant to change the status for these contacts because they opted-in, you should have this box selected so there is no status change for your transactional contacts.

15. If your import includes updating existing contacts, check **Existing active contacts need to reconfirm their subscription** box if you want updated contacts to be required to provide consent again.

   Because the EU has determined that consent can expire, this checkbox gives you the option of asking contacts to refresh their consent. When you check this box:

   - An existing contact in this import will have their status reset to unconfirmed.
   - On the next page, you will need to send updated contacts a subscription confirmation email that contains a %!*confirm_url%% webform tag (link). This webform link allows contacts to refresh their consent.

16. Click **Next**.

17. Select how you want to inform new contacts that they have been added to your account.

   New Bronto contacts will need to go through Bronto’s **automated onboarding process**, which begins the first time a contact is sent a message. For contacts being added, you can select:

   - **Do not inform them**.
• **Send them a welcome message.**

  A welcome message is an automated message that is sent to new contacts. The message does not require any action or confirmation. You might consider using a welcome message to send a standard (or "welcome") message to all new contacts.

• **Send them a subscription confirmation.**

  A subscription confirmation message requires contacts to click a link to confirm they want to subscribe to your messages; i.e. double opt-in. Contacts who are sent a subscription confirmation message remain in **unconfirmed contact status** until they click the link. Unconfirmed status means a contact is unable to receive marketing messages from you until they confirm subscription.

  Remember to include the ```%%!confirm_url%%``` tag in your message.

  **Note:** Any message you send will need to be approved for transactional sending. For more information on getting an email message approved for transactional sending, see **Request Transactional Message Approval** on page 299.

18. Select how you want to inform existing contacts that they have been added to your account or have been updated.

If you selected **Existing active contacts need to reconfirm their subscription** on the previous page, you must select **Send them a subscription confirmation** so these contacts have an opportunity to consent to receiving messages. Until contacts refresh their consent, they will remain in unconfirmed contact status. For contacts being updated, you can select:

• **Do not inform them.**

• **Send them a welcome message.**

  A welcome message is an automated message that is sent to new contacts. The message does not require any action or confirmation. You might consider using a welcome message to send a standard (or "welcome") message to all new contacts.

• **Send them a subscription confirmation.**

  A subscription confirmation message requires contacts to click a link to confirm they want to subscribe to your messages; i.e. double opt-in. Contacts who are sent a subscription confirmation message remain in **unconfirmed contact status** until they click the link. Unconfirmed status means a contact is unable to receive marketing messages from you until they confirm subscription.

  Remember to include the ```%%!confirm_url%%``` tag in your message.

  **Note:** Any message you send will need to be approved for transactional sending. For more information on getting an email message approved for transactional sending, see **Request Transactional Message Approval** on page 299.

19. If you selected an option that includes sending a message:

  a) Click **Pick Message**.

  b) Click in the row associated with the message you want to send.

  c) Click **Select**.

  d) Add a from name for the message in the **From Name** text box.

  e) Add a from email address in the **From Email Address** text box.

20. **Click Next.**

21. **Map columns from your file to fields you have created for your contacts.**

   The columns from your file will appear on the left, and a pull-down menu containing all of the fields you have created will be on the right. You are able to import additional data fields into your list. To do this, you need to make sure that you've stored the desired additional data fields in the file that you're importing. During the import process, you'll be able to map the fields in your file to fields you have created in your account.

   The first fields listed as available for mapping are reserved fields. These fields are created by Bronto and are different from the custom contact fields that you can create.
Table 6: Reserved Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>The email address stored for the contact. An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Message Type Preference</td>
<td>Indicates whether a contact prefers to receive messages as text or HTML.</td>
</tr>
<tr>
<td>Opt-in Consent Date (consent_date)</td>
<td>The date of the last change or addition to the consent log for the contact.</td>
</tr>
<tr>
<td>Consent IP Address (consent_ip_address)</td>
<td>The IP address that is associated with a consent record.</td>
</tr>
</tbody>
</table>

Note: If you are mapping data from your file to a field with a type of checkbox, the following values will set the checkbox to unchecked:

- 0
- unchecked
- false
- no
- n
- "" (an empty string)

All other values will set the checkbox to checked.

22. Click Next.
23. Add your contacts to a new list or an existing list(s).
   - To add your contacts to an existing list, click the checkbox next to the list(s) you want to add them to.
     You can use the search box to search for lists created in your account. You can click Select All to select all the lists in your account.
   - To add your contacts to a new list, click the New list checkbox and give your new list an internal and external name.
24. Click Next.
25. Specify if you want to remove these contacts from any lists.
   This step is only available if you choose Update Existing/ Add New Contacts or Update Existing Contacts.
26. Click Next.
27. If you wish to be notified via email when the import is finished, click the Send email checkbox and provide the email address that will be notified when the import is complete.
   The email notification will tell you how many contacts were added to your account. It will also tell you how many contacts were not added because they are invalid, duplicates, or previously unsubscribed.
28. Click Next.
29. Review the details you have selected for the contact import.
30. Click Finish to complete the set-up and begin the import process.
   Small imports (less than 20k contacts) will complete very quickly - in less than a few minutes. Imports larger than 20K contacts will take longer.

Related Topics

Video: Import Contacts via CSV
Import A Tab-Delimited File
You can import contacts into Bronto using tab delimited files.

We do not support Excel file imports. To import an Excel file, choose "Save As" in Excel to save your file in a supported format - either CSV or tab delimited.

Before you import a file, make sure your file is properly formatted.

To import a tab delimited file:

1. Go to Tables > Contacts > Manage.
2. Click Import.
3. Click the checkbox in the Certify List Compliance section to acknowledge you have read and agree to our terms of service/permission marketing policy.
4. Identify the source of the contacts you are importing in the Where did you obtain these contacts from text box.
   - If a source is provided, it will appear on the Contact Details page for that contact. For more information, see Contact Details General Information on page 911.
5. Click Next.
6. Click the Import from a tab-delimited file or files radio button.
7. Click Choose File.
8. Select the file you want to import.
9. Click Open.
10. Optional: Click the First row of file(s) is header row checkbox if you want the first row in the file to be the header.
11. Select a character set encoding type to apply to your contact import files from the Character Set list.

   The character set selected must match the character set used in your file(s) or your contact data will not be processed correctly. Also, all of the files in a single import must use the same encoding. If you're not sure what to select here, you have the option of selecting I don't know my character set. When you select I don't know my character set Bronto will attempt to import and validate the imported data as UTF-8. If Bronto determines that the file was not using UTF-8, the platform will then import the file(s) using ISO-8859-1 (Latin 1). This does not guarantee the files are using the ISO-8859-1 (Latin 1) character set. You should look at the contact data you imported to make sure it was stored as expected. Pay particularly close attention to any special characters your data may have, such as é.

   For more information see Contact Import Character Sets on page 1096.
12. Click Next.
13. Choose what you want to do with the contacts once they are imported into your account.

   Each option is described below:

   • Update existing contacts, Add new contacts adds any new contacts to your account and updates any field for contacts who already exist in your account. No existing email addresses will be changed or updated. This is a good option when your list contains a mix of existing and new contacts.
   • Add new contacts adds any new contacts to your account. This option does not affect existing contacts in any way.
   • Update existing contacts updates the field data for any contacts who already exist in your account. No existing email addresses will be changed or updated.
   • Unsubscribe both new and existing contacts gives any new contacts being added during this import a status of unsubscribed. It will also change the status of any existing contacts affected by this import to unsubscribed.
   • Unsubscribe existing contacts unsubscribes all of the contacts who already exist in your account.

   Note: Skip to the last three steps in the import process if you select this option.

   • Remove existing contacts deletes all of the contacts who already exist in your account.

   Note: Skip to the last three steps in the import process if you select this option.
If a contact on the import list already exists in your account and has a status of transactional, their status will be switched to onboarding if you choose Update existing contacts, Add new contacts or Update existing contacts.

For more information on each type of contact status, see Contact Status on page 1083.

14. If your import includes updating existing contacts, select the Existing transactional contacts remain transactional box if you do not want the import to change the status of transactional contacts. If you do not select this box, contacts with a transactional status are automatically moved from transactional to onboarding status. Unless your import is meant to change the status for these contacts because they opted-in, you should have this box selected so there is no status change for your transactional contacts.

15. If your import includes updating existing contacts, check Existing active contacts need to reconfirm their subscription box if you want updated contacts to be required to provide consent again.

Because the EU has determined that consent can expire, this checkbox gives you the option of asking contacts to refresh their consent. When you check this box:

- An existing contact in this import will have their status reset to unconfirmed.
- On the next page, you will need to send updated contacts a subscription confirmation email that contains a %!confirm_url%% tag (link). This webform link allows contacts to refresh their consent.

16. Click Next.

17. Select how you want to inform new contacts that they have been added to your account.

New Bronto contacts will need to go through Bronto’s automated onboarding process, which begins the first time a contact is sent a message. For contacts being added, you can select:

- Do not inform them.
- Send them a welcome message.

A welcome message is an automated message that is sent to new contacts. The message does not require any action or confirmation. You might consider using a welcome message to send a standard (or “welcome”) message to all new contacts.

- Send them a subscription confirmation.

A subscription confirmation message requires contacts to click a link to confirm they want to subscribe to your messages; i.e. double opt-in. Contacts who are sent a subscription confirmation message remain in unconfirmed contact status until they click the link. Unconfirmed status means a contact is unable to receive marketing messages from you until they confirm subscription.

Remember to include the %!confirm_url%% tag in your message.

Note: Any message you send will need to be approved for transactional sending. For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

18. Select how you want to inform existing contacts that they have been added to your account or have been updated.

If you selected Existing active contacts need to reconfirm their subscription on the previous page, you must select Send them a subscription confirmation so these contacts have an opportunity to consent to receiving messages. Until contacts refresh their consent, they will remain in unconfirmed contact status. For contacts being updated, you can select:

- Do not inform them.
- Send them a welcome message.

A welcome message is an automated message that is sent to new contacts. The message does not require any action or confirmation. You might consider using a welcome message to send a standard (or “welcome”) message to all new contacts.

- Send them a subscription confirmation.

A subscription confirmation message requires contacts to click a link to confirm they want to subscribe to your messages; i.e. double opt-in. Contacts who are sent a subscription confirmation message remain in
**unconfirmed contact status** until they click the link. Unconfirmed status means a contact is unable to receive marketing messages from you until they confirm subscription.

Remember to include the `%%!confirm_url%%` tag in your message.

> **Note:** Any message you send will need to be approved for transactional sending. For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

19. If you selected an option that includes sending a message:
   a) Click **Pick Message**.
   b) Click in the row associated with the message you want to send.
   c) Click **Select**.
   d) Add a from name for the message in the **From Name** text box.
   e) Add a from email address in the **From Email Address** text box.

20. Click **Next**.

21. Map columns from your file to fields you have created for your contacts.

   The columns from your file will appear on the left, and a pull-down menu containing all of the fields you have created will be on the right. You are able to import additional data fields into your list. To do this, you need to make sure that you've stored the desired additional data fields in the file that you're importing. During the import process, you'll be able to map the fields in your file to fields you have created in your account.

   The first fields listed as available for mapping are reserved fields. These fields are created by Bronto and are different from the custom contact fields that you can create.

   **Table 7: Reserved Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>The email address stored for the contact. An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Message Type Preference</td>
<td>Indicates whether a contact prefers to receive messages as text or HTML.</td>
</tr>
<tr>
<td>Opt-in Consent Date (consent_date)</td>
<td>The date of the last change or addition to the consent log for the contact.</td>
</tr>
<tr>
<td>Consent IP Address (consent_ip_address)</td>
<td>The IP address that is associated with a consent record.</td>
</tr>
</tbody>
</table>

> **Note:** If you are mapping data from your file to a field with a type of **checkbox**, the following values will set the checkbox to unchecked:

   - 0
   - unchecked
   - false
   - no
   - n
   - "" (an empty string)

   All other values will set the checkbox to checked.

22. Click **Next**.

23. Specify if you want to remove these contacts from any lists.

   This step in only available if you choose **Update Existing/ Add New Contacts** or **Update Existing Contacts**.

24. Click **Next**.
25. Specify if you want to remove these contacts from any lists.
   This step in only available if you choose Update Existing/ Add New Contacts or Update Existing Contacts.

26. Click Next.

27. If you wish to be notified via email when the import is finished, click the Send email checkbox and provide the email address that will be notified when the import is complete.
   The email notification will tell you how many contacts were added to your account. It will also tell you how many contacts were not added because they are invalid, duplicates, or previously unsubscribed.

28. Click Next.

29. Click Finish to complete the set-up and begin the import process.

30. Review the details you have selected for the contact import.

Related Topics
Request Transactional Message Approval on page 299

Import A Salesforce Report

You need to provide your Salesforce credentials on the Connections Center pages before you begin importing from Salesforce. Click Home > Connections Center > Salesforce to get to the Salesforce Connections page.

To import a Salesforce report:

1. Go to Tables > Contacts > Manage.
2. Click Import.
3. Click the checkbox in the Certify List Compliance section to acknowledge you have read and agree to our terms of service/permission marketing policy.
4. Identify the source of the contacts you are importing in the Where did you obtain these contacts from text box.
   If a source is provided, it will appear on the Contact Details page for that contact. For more information, see Contact Details General Information on page 911.
5. Click Next.
6. Click the Import from a Salesforce Report radio button.
7. Click Next.
8. Choose the Salesforce report you want to import.
9. Click Next.
10. Choose what you want to do with the contacts once they are imported into your account.
    Each option is described below:
    - **Update existing contacts, Add new contacts** adds any new contacts to your account and updates any field for contacts who already exist in your account. No existing email addresses will be changed or updated. This is a good option when your list contains a mix of existing and new contacts.
    - **Add new contacts** adds any new contacts to your account. This option does not affect existing contacts in any way.
    - **Update existing contacts** updates the field data for any contacts who already exist in your account. No existing email addresses will be changed or updated.
    - **Unsubscribe both new and existing contacts** gives any new contacts being added during this import a status of unsubscribed. It will also change the status of any existing contacts affected by this import to unsubscribed.
    - **Unsubscribe existing contacts** unsubscribes all of the contacts who already exist in your account.
      
      **Note:** Skip to the last three steps in the import process if you select this option.
    - **Remove existing contacts** deletes all of the contacts who already exist in your account.
      
      **Note:** Skip to the last three steps in the import process if you select this option.
If a contact on the import list already exists in your account and has a status of **transactional**, their status will be switched to **onboarding** if you choose **Update existing contacts, Add new contacts** or **Update existing contacts**.

For more information on each type of contact status, see [Contact Status](#) on page 1083.

11. If your import includes updating existing contacts, check **Existing active contacts need to reconfirm their subscription** box if you want updated contacts to be required to provide consent again.

Because the EU has determined that consent can expire, this checkbox gives you the option of asking contacts to refresh their consent. When you check this box:

- An existing contact in this import will have their status reset to unconfirmed.
- On the next page, you will need to send updated contacts a subscription confirmation email that contains a \% confirm_url\% webform tag (link). This webform link allows contacts to refresh their consent.

12. **Click Next**.

13. Select how you want to inform new contacts that they have been added to your account.

New Bronto contacts will need to go through Bronto's **automated onboarding process**, which begins the first time a contact is sent a message. For contacts being added, you can select:

- **Do not inform them**.
- **Send them a welcome message**.
  
  A welcome message is an automated message that is sent to new contacts. The message does not require any action or confirmation. You might consider using a welcome message to send a standard (or "welcome") message to all new contacts.
- **Send them a subscription confirmation**.
  
  A subscription confirmation message requires contacts to click a link to confirm they want to subscribe to your messages; i.e. double opt-in. Contacts who are sent a subscription confirmation message remain in **unconfirmed contact status** until they click the link. Unconfirmed status means a contact is unable to receive marketing messages from you until they confirm subscription.

  Remember to include the \% confirm_url\% tag in your message.

  **Note:** Any message you send will need to be approved for transactional sending. For more information on getting an email message approved for transactional sending, see [Request Transactional Message Approval](#) on page 299.

14. **Select how you want to inform existing contacts that they have been added to your account or have been updated.**

If you selected **Existing active contacts need to reconfirm their subscription** on the previous page, you must select **Send them a subscription confirmation** so these contacts have an opportunity to consent to receiving messages. Until contacts refresh their consent, they will remain in unconfirmed contact status. For contacts being updated, you can select:

- **Do not inform them**.
- **Send them a welcome message**.
  
  A welcome message is an automated message that is sent to new contacts. The message does not require any action or confirmation. You might consider using a welcome message to send a standard (or "welcome") message to all new contacts.
- **Send them a subscription confirmation**.
  
  A subscription confirmation message requires contacts to click a link to confirm they want to subscribe to your messages; i.e. double opt-in. Contacts who are sent a subscription confirmation message remain in **unconfirmed contact status** until they click the link. Unconfirmed status means a contact is unable to receive marketing messages from you until they confirm subscription.

  Remember to include the \% confirm_url\% tag in your message.
**Note:** Any message you send will need to be approved for transactional sending. For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

15. If you selected an option that includes sending a message:
   a) Click **Pick Message**.
   b) Click in the row associated with the message you want to send.
   c) Click **Select**.
   d) Add a from name for the message in the **From Name** text box.
   e) Add a from email address in the **From Email Address** text box.

16. Click **Next**.

17. Map columns from your file to fields you have created for your contacts.

   The columns from your file will appear on the left, and a pull-down menu containing all of the fields you have created will be on the right. You are able to import additional data fields into your list. To do this, you need to make sure that you've stored the desired additional data fields in the file that you're importing. During the import process, you'll be able to map the fields in your file to fields you have created in your account.

   The first fields listed as available for mapping are reserved fields. These fields are created by Bronto and are different from the custom contact fields that you can create.

   **Table 8: Reserved Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>The email address stored for the contact. An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Message Type Preference</td>
<td>Indicates whether a contact prefers to receive messages as text or HTML.</td>
</tr>
<tr>
<td>Opt-in Consent Date (consent_date)</td>
<td>The date of the last change or addition to the consent log for the contact.</td>
</tr>
<tr>
<td>Consent IP Address (consent_ip_address)</td>
<td>The IP address that is associated with a consent record.</td>
</tr>
</tbody>
</table>

   **Note:** If you are mapping data from your file to a field with a type of **checkbox**, the following values will set the checkbox to unchecked:

   - 0
   - unchecked
   - false
   - no
   - n
   - "" (an empty string)

   All other values will set the checkbox to checked.

18. Click **Next**.

19. Add your contacts to a new list or an existing list(s).

   - To add your contacts to an existing list, click the checkbox next to the list(s) you want to add them to.
     You can use the search box to search for lists created in your account. You can click **Select All** to select all the lists in your account.
   - To add your contacts to a new list, click the **New list** checkbox and give your new list an internal and external name.
20. Click Next.
21. Specify if you want to remove these contacts from any lists.
   This step in only available if you choose Update Existing/ Add New Contacts or Update Existing Contacts.
22. Click Next.
23. If you wish to be notified via email when the import is finished, click the Send email checkbox and provide the
   email address that will be notified when the import is complete.
   The email notification will tell you how many contacts were added to your account. It will also tell you how many
   contacts were not added because they are invalid, duplicates, or previously unsubscribed.
24. Click Next.
25. Review the details you have selected for the contact import.
26. Click Finish to complete the set-up and begin the import process.
   Small imports (less than 20k contacts) will complete very quickly - in less than a few minutes. Imports larger than
   20K contacts will take longer.

Related Topics
Request Transactional Message Approval on page 299

Use Copy And Paste To Import Contacts
To copy and paste email addresses into a text box:
1. Go to Tables > Contacts > Manage.
2. Click Import.
3. Click the checkbox in the Certify List Compliance section to acknowledge you have read and agree to our terms
   of service/permission marketing policy.
4. Identify the source of the contacts you are importing in the Where did you obtain these contacts from text box.
   If a source is provided, it will appear on the Contact Details page for that contact. For more information, see
   Contact Details General Information on page 911.
5. Click Next.
6. Click the Specify individual email addresses radio button.
7. Cut and paste or type email addresses into the text box. Separate email addresses by commas, spaces, or new lines.
8. Optional: Click the First row of file(s) is header row checkbox if you want the first row in the file to be the
   header.
9. Click Next.
10. Choose what you want to do with the contacts once they are imported into your account.
    Each option is described below:
    • Update existing contacts, Add new contacts adds any new contacts to your account and updates any field for
      contacts who already exist in your account. No existing email addresses will be changed or updated. This is a
      good option when your list contains a mix of existing and new contacts.
    • Add new contacts adds any new contacts to your account. This option does not affect existing contacts in any
      way.
    • Update existing contacts updates the field data for any contacts who already exist in your account. No
      existing email addresses will be changed or updated.
    • Unsubscribe both new and existing contacts gives any new contacts being added during this import a status
      of unsubscribed. It will also change the status of any existing contacts affected by this import to unsubscribed.
    • Unsubscribe existing contacts unsubscribes all of the contacts who already exist in your account.
      Note: Skip to the last three steps in the import process if you select this option.
    • Remove existing contacts deletes all of the contacts who already exist in your account.
      Note: Skip to the last three steps in the import process if you select this option.
If a contact on the import list already exists in your account and has a status of transactional, their status will be switched to onboarding if you choose Update existing contacts, Add new contacts or Update existing contacts.

For more information on each type of contact status, see Contact Status on page 1083.

11. Click Next.

12. Select how you want to inform new contacts that they have been added to your account.

   New Bronto contacts will need to go through Bronto's automated onboarding process, which begins the first time a contact is sent a message. For contacts being added, you can select:
   
   • Do not inform them.
   • Send them a welcome message.
   
       A welcome message is an automated message that is sent to new contacts. The message does not require any action or confirmation. You might consider using a welcome message to send a standard (or "welcome") message to all new contacts.
   • Send them a subscription confirmation.
   
       A subscription confirmation message requires contacts to click a link to confirm they want to subscribe to your messages; i.e. double opt-in. Contacts who are sent a subscription confirmation message remain in unconfirmed contact status until they click the link. Unconfirmed status means a contact is unable to receive marketing messages from you until they confirm subscription.

       Remember to include the %%!confirm_url%% tag in your message.

   Note: Any message you send will need to be approved for transactional sending. For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

13. If you selected an option that includes sending a message:
   
       a) Click Pick Message.
       b) Click in the row associated with the message you want to send.
       c) Click Select.
       d) Add a from name for the message in the From Name text box.
       e) Add a from email address in the From Email Address text box.

14. Click Next.

15. Add your contacts to a new list or an existing list(s).

       • To add your contacts to an existing list, click the checkbox next to the list(s) you want to add them to.

       You can use the search box to search for lists created in your account. You can click Select All to select all the lists in your account.

       • To add your contacts to a new list, click the New list checkbox and give your new list an internal and external name.

16. Click Next.

17. Specify if you want to remove these contacts from any lists.

       This step is only available if you choose Update Existing/Add New Contacts or Update Existing Contacts.

18. Click Next.

19. If you wish to be notified via email when the import is finished, click the Send email checkbox and provide the email address that will be notified when the import is complete.

       The email notification will tell you how many contacts were added to your account. It will also tell you how many contacts were not added because they are invalid, duplicates, or previously unsubscribed.

20. Click Next.

21. Review the details you have selected for the contact import.

22. Click Finish to complete the set-up and begin the import process.
Small imports (less than 20k contacts) will complete very quickly - in less than a few minutes. Imports larger than 20K contacts will take longer.

Related Topics
Request Transactional Message Approval on page 299

Select Multiple Files To Upload With An Import

You may select multiple files to upload when importing a list. All files must be in the same format (i.e. same columns, and all either comma-separated or tab-separated).

Before you import files, make sure all of the files are properly formatted.

To select multiple files to upload:
1. Go to Tables > Contacts > Manage.
2. Click Import.
3. Click the checkbox in the Certify List Compliance section to acknowledge you have read and agree to our terms of service/permission marketing policy.
4. Identify the source of the contacts you are importing in the Where did you obtain these contacts from text box.
   If a source is provided, it will appear on the Contact Details page for that contact. For more information, see Contact Details General Information on page 911.
5. Click Next.
6. Click Choose File.
7. Select the file you want to import.
8. Click Open.
9. Repeat steps 6, 7, and 8 for each additional file you want to upload.

   To remove a file from the list of files to be uploaded, click the X next to that file's name.

Contact Import Character Sets

When you import a file you need to identify the character set used in the file so your contact data is imported properly.

A character set is a collection of characters with a defined set of rules, or encoding, that interprets and determines how those characters will be displayed. Because different character sets use unique encoding rules, it's important that you specify the character set your file uses when you upload contact data. If you specify the wrong character set for a contact import then the incorrect file encoding rules will be applied and your contact data will be incorrectly formatted in Bronto.

For example, there are differences in the way character sets manage the Latin letter é. So, if you have Québec as a city in your file and your data is imported incorrectly, Québec could possibly be saved in Bronto as QuÃ©bec, which is how it would display if you used this contact field in a message.

So how do you know what character set your files use? Because character set encoding is so complicated there is no easy set of rules we can provide to help you identify the encoding for your files. Therefore, we recommend contacting the person who made the files to find out. You can also see if the file has any metadata that tells you what character set was used. If there isn't any metadata, or if the person who provided the file doesn't know, we provide the option for you to indicate that you do not know what character set the files use when you set up a contact import.

If you don't know what character encoding your file uses, then it is most likely either UTF-8 or ISO-8859-1 (Latin 1) as these are the most widely adopted character sets. So when you choose I don't know my character set from the Character Set list, Bronto will import the file as UTF-8. After the initial import, the platform will run a validation check on the imported data. If the imported data is not valid UTF-8, Bronto will remove it and reimport the files using ISO-8859-1 (Latin 1) encoding. This does not guarantee the files are using the ISO-8859-1 (Latin 1) character set.

You should look at the contact data you imported to make sure it appears as expected.

When the import completes, you should validate the contact data in your file against the contact data in Bronto to ensure the proper character set encoding was applied to your data. To do this, go to Tables > Contacts > Manage, click Special Reports, and generate a report with contacts who were assigned onboarding status. Or, if you have
imported the contacts into one list, you can use a list report for comparison by exporting your list from Tables > Contacts > Lists. Once you have an export, compare the contact data in the report with the contact data in your file. Pay particularly close attention to the formatting for any special characters your file may have, such as é. If the encoding is correct, you do not need to take any further action. If the encoding is not correct, contact your account manager for further assistance.

Add Or Update Contacts Using Data Loader
You can use Data Loader to add new contacts or update data for existing contacts.

You can create a single import that will add and update contacts, or multiple imports that each serve a different function. As you configure the import you will:

- Let the import know how to recognize which files on the FTP server should be imported.
- Map the headers in your file to contact fields in Bronto so that data is categorized and stored correctly.
- Configure General, Data Format, and Bronto-Specific settings in order to specify how you want your contact data to be managed.

Once configured, the import will automatically run based on the schedule you have set. You can see your contacts in Bronto by going to Tables > Contacts > Search Contacts. For more information see Search For Contacts In Your Account on page 896.

When you import a file, its contents are compared to existing data in Bronto. If a new record matches an existing record, Bronto will overwrite the existing record. This means if you import an update to a record that includes blank/null fields then the data stored in Bronto for the fields will be blank and/or null after the import.

However, when you import contact data you can set Bronto to ignore blank and null data so existing contact data is not overwritten. See step 12 d for more information.

To add or update contacts:
1. Go to Tables > Data Loader.
2. Click Create Import.
3. Enter the relevant information in the Create Import Job window.
   a) Enter a name for the import in the Name box.
   b) Enter a description for the import in the Description box.
      The description is a good way to distinguish between similar imports.
   c) Select Add or Update Contacts from the Type list.
   d) Click Create Import Job.
4. Click the Upload Sample File To Begin Mapping button to map the categories in your file to contact fields in Bronto.
   This let's Bronto know how to appropriately manage your contact data as it is imported.
5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   - Pipes |
   - Commas ,
   - Semicolons ;
   - Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the Upload Sample File window, select Upload a file.
   b) Select your file from the Files list.
   c) Click Upload Sample File.
If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.

7. If you have transferred a file to the server that you want to map data for:
   a) In the **Upload Sample File** window, select **Select one of the files in your account**.
   b) Click **Choose File**, select your file in the finder window, then click **Open**.
   c) Click **Upload Sample File**.

If the file upload is successful, the mapping page will be displayed.

8. Select the Bronto contact field from the **Map to** list that matches the data shown for the column.

Mapping helps the platform understand how to manage data as it is imported. For example, in the image below you would select **Email Address** for Column #1 and **First Name (text)** for Column #2. This way, when your email addresses are imported they are formatted like an email address, etc.

The first fields listed as available for mapping in Data Loader are reserved fields. These fields are created by Bronto and are different from the custom contact fields that you can create.

### Table 9: Reserved Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>The email address stored for the contact. An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact. A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the contact.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on each type of contact status, see <strong>Contact Status</strong> on page 1083.</td>
</tr>
<tr>
<td>IP Address</td>
<td>The IP address that is associated with a consent record.</td>
</tr>
<tr>
<td>Consent Date</td>
<td>The date of the last change or addition to the consent log for the contact.</td>
</tr>
</tbody>
</table>
The other contact fields available in this list are the contact fields you have created in Bronto. If you do not see a relevant field in the list, you can select Create New Field in Bronto and create a new contact field.

9. Optional: If you need to create a new contact field:
   a) Select Create New Field in Bronto.
   b) Enter a name for the field in the Name box.
   c) Enter a name for the field in the External Name box.
   d) Select the contact field type from the Type list.

   The contact field type indicates the type of data that can be stored in the field. For more the description and parameters for each field type see Contact Field Types on page 559.
   e) Click Create Field.

10. When you have finished mapping your fields, click the Configuration tab to set up the import configuration.
11. In the General area, configure the general settings for your import:
   a) Select Yes or No in the Skip First Row Header list.
   b) Select 30 days or 3 days from the Cleanup Schedule list.

   This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the Filename Matching Scheme list

   • Ends with will match files based on the extension specified for the Filename Matching Pattern. Only use Ends with when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, Custom Glob is the best choice.

   For example, .csv would match contacts_import.csv and contacts_09_2017.csv.
   • Starts with will match files based on the characters specified for the Filename Matching Pattern starting with the first character. For example, if you have contact for the Filename Matching Pattern then all files on the FTP server that start with the word contact will attempt to be imported.

   For example, contacts would match contacts_import.csv, contacts_09_2017.csv, and contacts_export.txt.
   • Custom Glob will match files based on the characters and the extension specified for the Filename Matching Pattern. This allows you to use wildcards (an asterisk) in order to build more complex import queries.

   For example contact*.csv.
   d) Enter a full or partial filename in the Filename Matching Pattern box.

   This is used in conjunction with the Filename Matching Scheme to recognize what files on the FTP server should be imported using this import job. If you use the Custom Glob option for Filename Matching Scheme you can use wildcards (an asterisk).

   Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.
   e) If you want to receive an email notification when your imports complete, enter an email address in the Confirmation Email box.

   The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.
   f) Select a job type from the Import Action list.

   If your files have a list of new and existing contacts you should choose Add or Update. Otherwise, choose Add to add new contacts, Update to change the information for existing contacts, and Delete to remove contacts.
g) Select a contact status from the **Add/Update Contacts With the Following Status** list.

If you are

- **Adding Contacts**: you can choose to give new contacts onboarding, unconfirmed, or transactional status. Typically you would want to assign new contacts onboarding status so you can engage them in a welcome series where the contacts can opt-in to receiving your marketing emails.
- **Updating contacts**: you can choose to give these contacts onboarding, unconfirmed, transactional, or unsubscribed status. But, unless changing the contact status is a primary reason for your import, typically best choice when updating contacts is **Do Not Update**.
- **Adding and Updating**: when your import is both adding and updating contacts, the contact status you select is only applied to new contacts that are added. The status of updated contacts will not be changed.

If contacts are given an unconfirmed or transactional statuses, these contacts will need to double opt-in before they can be sent marketing messages from Bronto. These contacts can still be sent transactional messages. For more information see **Contact Status** on page 1083.

12. In the **Expected Data Format** area, configure how you want the data in your file to be managed as it is imported:

   a) If you want to change the delimiter from what you selected when you created the import, select a new delimiter from the **Delimiter** list.

   b) If you plan to import date-based data, click the calendar icon under **Date Format** and fill in the options in the Date Format Builder window.

      You must map a date-based field before you can configure **Date Format**. In the **Date Format Builder**, select a data from the **Example Date & Time** list, click **Go**, then click on each number in the date to select whether it is a **Day**, **Month**, or **Year**, and then click **Done**.

   c) Add the types of field data you want to be ignored during import to the **Do Not Update Choices** box.

      The options you can add here are **null**, **blank**, and **0**. When you include these options in the **Do Not Update Choices** box, any existing data for these fields will not be overwritten. If you do not include one of these options here, then any field data previously in Bronto will be overwritten/erased.

13. In the **Bronto Settings** area, configure any Bronto-specific

   a) In **Contact Custom Import Source** provide the text representation of the contact's **Source** field.

      The Source field is found in the edit page for a given contact in your Bronto account. You can write whatever you want in the textbox, as the setting helps you audit your imports in Bronto, and keeps you informed from where your contacts are coming from.

   b) If you want to subscribe contacts to an SMS Keyword as they are imported, enter the keyword in the **Add Contacts to Specified SMS Keywords** box.

      Please note that the file must have mobile numbers mapped in order for the contact to be subscribed to the SMS keyword.

   c) If you want to add contacts to a list as they are imported, enter the list name in the **Add Contacts to Specified Lists** box.

14. When you have finished import configuration, click **Save & Close**.

    A window that asks you to confirm the legitimacy of the new contacts is displayed.

    a) Select the **I Agree** box.

    b) Click **Continue**.

15. If you haven’t already, **Transfer Your Files to the FTP Server**.

16. Find the import you just configured and perform a **Test Run** to ensure that the files are valid.

    Based on the results of the test run, fix any issues as necessary.

After the import has run, you can **Data Loader Reports** on page 1182 to see details about your import.

**Related Topics**

**Data Loader** on page 1167
With Data Loader you can set up automatic daily or hourly imports of your contact, order, and/or Coupon Manager data into Bronto.

Transfer Files To FTP Server For Data Loader on page 1168
Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.

Create An Individual Contact

The Add/Edit Contact page lets you create a new contact, or edit an existing contact.

When you add an individual contact, you will need to manually provide all of the information you would during an import, including contact details and fields, and list membership.

To create a contact:
1. Go to Tables > Contacts > Search Contacts.
2. Click Create New Contact.
3. Add an email address for the contact in the Email Address text box.
4. Select an email message type for the contact using the Message Preferences radio buttons. You can select:
   • HTML
   • Text
5. Optional: Click the Enable this contact for use in dynamic preview testing checkbox to enable dynamic preview for the contact.
   Dynamic Preview allows you to preview an email message or an SMS message as if you were a specific contact in your account.
6. Optional: To view a Dynamic Preview of an email message:
   a) Go to the Edit Message page by creating a new email message or by editing an existing email.
   b) Click Show Preview.
   c) Select a contact from the:
7. Optional: To view a Dynamic Preview of an SMS message:
a) Go to the **Edit SMS Message** page by creating a new SMS message or by editing an existing SMS message.
b) Click **Show Preview**.
c) Select a contact that you have enabled dynamic preview for from the **Select a contact to view a preview for** pull-down menu.

8. Optional: Add in a twitter handle for the contact in the **Twitter account** text box.

9. Add the source of the contact (i.e. where the contact's email address was acquired from) in the **Contact Source** text box.

   If a contact source is provided, it will appear in the **General Information** section on the overview page for the contact. For more information, see **Contact Details General Information** on page 911.

10. Provide the date the contact agreed to receive communications from you in the **Consent Date** box.

    If you provide a date here, this will be added to the consent record for the contact and cannot be modified.

11. Provide the IP address the contact used when they agreed to receive communications from you in the **Consent IP Address** box.

    If you provide an IP here, this will be added to the consent record for the contact and cannot be modified.

12. Add a mobile number for the contact in the **Mobile Number** text box.

    Click the flag icon to apply the appropriate country code to the mobile number.

13. In the **Fields** section, add the field data you wish to associate with the contact.

    Depending on the type of field you are viewing, you can either click the radio button, click the checkbox, select an option from the pull-down menu, select a date from the calendar, or type in some text in the text box to add a value to that field for the contact you are viewing.

    For information on fields, see **Contact Fields** on page 558.

14. In the **Lists** section, click the checkbox next to the lists you want to add the contact to.

    You can use the **Select All** and **Deselect All** links to quickly add or remove the contact from all lists. You can also subscribe the contact to SMS keywords. Click the checkbox next to the SMS keyword(s) you want to add the contact to.

    For information on lists, see **Lists** on page 533.

15. Click **Save**.

**Direct Add**

Direct Add allows you to add contacts to your account via pages on your website.

This is accomplished by adding a special `img` tag to a page on your site. The `img` tag contains a URL (The Direct Add URL), and user-defined parameters containing data you want to pass back to your account. The data passed back consists of the following:

- A contact (referenced by email address).
- Any field data you want to associate with the contact.
- Any lists you want to add the contact to.
• A mobile number and any SMS keyword you want to add the contact to.
• A comment for the source of your contact.

Parameters are added to the Direct Add URL in the following format:

```
&email@example@example.com&field1=fieldname,operation,value&list2=listid&comment=source
```

**Warning:** If you are using a private domain and want to use Direct Add on a page accessed using https, you must do the following:

• Change the URL in the Direct Add img tag src attribute to use https.
• Change the domain in the Direct Add img tag src attribute to app.bronto.com.

**Warning:** When using Direct Add, please be mindful of character limits for URLs. We advise URLs to be less than 2,000 characters.

Unlike Direct Update, Direct Add does not require that a contact access a page on your site using an img tag via a sent message. The difference is contact identification. Direct Add is used to create new contacts in your account. Direct Update is used to perform actions pertaining to existing contacts. In the case of Direct Update, contacts are identified by a cookie this is set when a message is sent to them from the application. When they click on a link in the message and go to a page on your site containing the Direct Update img tag, the cookie is used to identify which contact to update or unsubscribe. This is the reason why pages on your site containing the Direct Update img tags can only be accessed via messages sent from the application.

A contact on the suppression list cannot be added to your account until the email address is removed from the suppression list. If a contact who is on the suppression list attempts to sign-up to receive email messages from you via an Add Contacts webform or via Direct Add, they will not be added as a contact in your account.

For more information on using the suppression list, see Suppression Lists on page 1403.

**Direct Add URL**

The Direct Add URL works by adding parameters that correspond to a contact you want to add, data you want to associate with the contact, and lists and SMS keywords you want to add the contact to.

These parameters are added to the Direct Add URL in the following format:

```
http://public_domain/public/?
q=direct_add&fn=Public_DirectAddForm&id=IDSTRING&email=email@example.com&field1=lifetime
```

URL breakdown:

• The first part of the URL allows Bronto to identify your account. It can be found in the code snippet contained in the Direct Add section on the Data Exchange page. http://public_domain/public/?

© Oracle 2018 | 1103
• The next few parameters, q, fn, and id allow us to know how to process the data in the URL as well as providing additional identification for your account. q=direct_add&fn=Public_DirectAddForm&id=IDSTRING
• The rest of the URL contains parameters that you define. These parameters are the data which you want to associate with the contact.
• The comment parameter passes source details. This comment will be visible in consent reports exported from the reporting downloads page and from the Contact Details page in the source details column.

Example of what data parameters might look like:

&email=email@example.com&field1=lifetimevalue,set,129.23&list2=555555ec0000000000000000000000055f5&field3=age,set,24&list4=33333ec000000000000000000000003f3&comment=DirectAdd

Some characters that are allowed in a URL are considered reserved characters. A reserved character is a character that can have a special meaning, for example a + symbol. It’s a best practice to avoid using reserved characters within an email address (except for @) and you should try to limit your contacts' ability to use them. However, if they do have a reserved character in their email you can encode the character so that it can be used in your URL. For example + would need to be encoded as %2B.

For more information on
• Adding field data to the Direct Add URL, see Add Field Data To The Direct Add URL on page 1104.
• Adding list data to the Direct Add URL, see Add Contacts To Lists When Using Direct Add on page 1104.
• Adding mobile number and SMS keyword data to the Direct Add URL, see Add Contacts To SMS Keywords When Using Direct Add on page 1105.

Add Field Data To The Direct Add URL
Adding field data to the Direct Add URL allows you to pass field data to the application when using Direct Add.

To add field data to the Direct Add URL, you need to use the exact spelling of the field. You can view all your fields by going to Tables > Contacts > Fields. Because you are adding a new contact, you will only be able to use set as the operator when adding field data.

http://public_domain/public/?
q=direct_add&fn=Public_DirectAddForm&id=IDSTRING&email=email@example.com&field1=lifetimevalue

set adds a value to the specified field. The following field types supported:
• number
• decimal
• currency
• date
• text
• text area
• checkbox
• radio button
• pull-down

⚠️ Warning: Be sure to use only lower case letters for the operator.

Add Contacts To Lists When Using Direct Add
When using Direct Add, you can add contacts to lists by adding list IDs to the Direct Add URL.

To add a list ID to the Direct Add URL, you will need to make note of the ID that corresponds to a specific list. For any list, you can go to Tables > Contacts > Lists and click on the name of the list you want to add the contact to. The ID for the list is displayed in the bottom right corner of the page.
Add Contacts To SMS Keywords When Using Direct Add

When using Direct Add, you can add contacts to SMS keywords by adding a mobile number and SMS keyword IDs to the Direct Add URL.

To add an SMS keyword ID to the Direct Add URL, you will need to make note of the ID that corresponds to the specific keyword. For any SMS keyword, you can go to Apps > Texter > SMS Keywords and click on the name of the keyword you want to add the contact to. The ID for the keyword is displayed in the bottom right corner of the page.

**Note:** For each SMS keyword a contact is added to, they will receive a confirmation message associated with that keyword.

**Note:** A contact can not be added to an SMS keyword unless a mobile number is also added using the `mobileNumber` parameter.
Add Source Details When Using Direct Add
When using Direct Add, you can add a comment to that will appear in the source details column of consent export reports.

To add a comment, you will need to append ?comment=TEXT to your DirectAdd URL string. This comment will be visible in consent reports exported from the reporting downloads page and from the Contact Details page in the source details column.

In the example below, the comment parameter value is MayDirectAdd.

http://public_domain/public/?
q=direct_add&fn=Public_DirectAddForm&id=IDSTRING&email=email@example.com&mobileNumber=5555555555&comment=MayDirectAdd

Add Multiple Values To The Direct Add URL
You can specify more than one field, SMS keyword, or list at a time in the Direct Add URL.

The application supports adding 20 values for lists, 20 values for keywords, and 20 values for fields per call. Additional fields, keywords, and lists are included by adding another parameter to the Direct Add URL. Multiple fields, keywords, and lists are separated by the ampersand character (&). You also need to increment the number after each field, keyword, or list.

For example:

&field1=age,set,35&list2=555555ec000000000000000000000005f5&field3=name,set,Joe&list4=33333ec0000000000000000000000033f3

Set Up The Direct Add Image Tag And Add It To Your Site
Once you have a clear understanding of how the Direct Add URL works, you can begin generating a Direct Add image tag to use on your site.

To setup Direct Add:

1. Go to Home > Settings > Data Exchange.
2. Click the Enable Direct Add for adding new contacts checkbox.
3. Optional: Select a status from the Add contacts with the following status pull-down to give contacts added via Direct Add one of the following statuses:

- **Onboarding** - Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.

- **Unconfirmed** - Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you in order for you to send to them.

- **Transactional** - Contacts with a status of Transactional can only be sent transactional emails. A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices. For more information on Transactional Emails, see Transactional Emails on page 294.

This setting only applies to contacts being added via Direct Add with the generated URL and does not apply to contacts being added to the application by other means (manual creation, import, etc.).

For more information on contact status, see Contact Status on page 1083.

4. Optional: Click the Send a welcome message checkbox to send a welcome message. If you choose to send a welcome message, you will need to do the following:

a) Select when to have the welcome message sent using the pull-down menu. You can select:
   - Only when the contact being added is new.
   - Every time the direct add URL is used.

b) Click Pick.

c) Click in the row associated with the message you want to use as the welcome message.

   **Note:** If you chose to add contacts with a status of unconfirmed, the message you choose to send will need to have been approved for transactional sending. For more information on getting an email message approved for transactional sending, see Request Transactional Message Approval on page 299.

d) Click Select.

e) Add a from name in the From Name text box.

f) Add a from address in the From Address text box.

5. Optional: Click the Create Tracking Cookie checkbox.

Clicking this checkbox will ensure that each time a contact is added using Direct Add, a cookie gets created for that contact. The cookie is used to identify the contact for the purpose of associating actions with them, such as placing orders or using direct update.

6. Copy the generated Direct Add img tag and add it to a page on your site.

The settings you selected above are used to dynamically generate a Direct Add img tag that you can copy and use on your site. The settings you select will not be saved when you leave the Data Exchange page.

**Warning:** If you are using a private domain and want to use Direct Add on a page accessed using https, you must do the following:

- Change the URL in the Direct Add img tag src attribute to use https.
- Change the domain in the Direct Add img tag src attribute to app.bronto.com.

7. Add any field, keyword, and list parameters to the URL that you want to pass back to the application.

The email parameter is included on the Direct Add URL by default.
For more information on adding field data to the Direct Add URL, see Add Field Data To The Direct Add URL on page 1104.

For more information on adding list data to the Direct Add URL, see Add Contacts To Lists When Using Direct Add on page 1104.

For more information on adding mobile number and SMS keyword data to the Direct Add URL, see Add Contacts To SMS Keywords When Using Direct Add on page 1105.

8. Add values to the email, field, keyword, and list parameters.

There are a number of ways you can accomplish this, with the most common being using JavaScript. The example below is of a form that a user can fill out and be added to Bronto using the Direct Add URL. The page contains JavaScript that populates the Direct Add URL with the appropriate data. You may need to scroll to the right to see the entire code example below:

```html
<!DOCTYPE html>
<html lang="en">
<head>
  <meta http-equiv="content-type" content="text/html; charset=UTF-8">
  <title>New Contact Form</title>
</head>
<body>
  <div class="container">
    <div class="container">
      <div class="row">
        <div class="span12">
          <h1 class="text-center">Email Sign Up</h1>
          <form class="form-horizontal" onsubmit="directAdd()">
            <div class="form-group">
              <label for="first_name" class="control-label col-xs-4">First Name</label>
              <div class="col-xs-8">
                <div class="input-group">
                  <i class="fa fa-address-card"></i>
                  <input id="firstname" name="first_name" type="text" class="form-control">
                </div>
              </div>
            </div>
            <div class="form-group">
              <label for="last_name" class="control-label col-xs-4">Last Name</label>
              <div class="col-xs-8">
                <div class="input-group">
                  <i class="fa fa-address-card"></i>
                  <input id="lastname" name="last_name" type="text" class="form-control">
                </div>
              </div>
            </div>
            <div class="form-group">
              <label for="email" class="control-label col-xs-4">Email</label>
              <div class="col-xs-8">
                <div class="input-group">
                  <input id="email" name="email" type="text" class="form-control">
                </div>
              </div>
            </div>
          </form>
        </div>
      </div>
    </div>
  </div>
</body>
</html>

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Related Topics

Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Transactional Emails on page 294

Use Direct Add And A Manage Preferences Webform To Add Contacts And Their Preferences
A common use case for using direct add is to add contacts to your account and subsequently allow them to manage their message preferences and provide more information about themselves.

To add contacts with direct add and a Manage Preferences webform:
1. Go to **Home > Settings > Data Exchange**.

2. Click the **Enable Direct Add for adding new contacts** checkbox.

3. Click the **Send a welcome message** checkbox.
   
   The welcome message will contain a cookie that is used to identify the contact. This cookie tells the message you select below (in this example, a Manage Preferences webform) which contact you are dealing with.

4. Select the welcome message to send using the message picker.
   
   For the purpose of this example, you will want to make sure you choose a message that contains a clearly defined link to a Manage Preferences webform.

5. Add a from name in the **From Name** text box.

6. Add a from address in the **From Address** text box.

7. Copy the generated Direct Add `<img>` tag and add it to a page on your site.

   The settings you selected above are used to dynamically generate a Direct Add `<img>` tag that you can copy and use on your site. The settings you select will not be saved when you leave the **Data Exchange** page.

   **Warning:** If you are using a private domain and want to use Direct Add on a page accessed using `https`, you must do the following:

   - Change the URL in the Direct Add `<img>` tag `src` attribute to use `https`.
   - Change the domain in the Direct Add `<img>` tag `src` attribute to `app.bronto.com`.

To summarize what is going on in this process, a person accesses a page on your site containing the Direct Add `<img>` tag. The information the person adds (email address, field data), along with the list ID you specified in the `<img>` tag, is passed back to your account. The person is added to your account (making them a contact) and the welcome message you specified above is sent to the contact. The welcome message contains a cookie that holds data (a contact ID) that identifies the contact and a link to a Manage Preferences webform. The contact then fills out the Manage Preferences webform and their preference information is passed back to the application when they submit the form. The application knows whose preferences to modify/change based on the identifying contact information contained in the cookie. Below is an image depicting a visual representation of the process described here:

---

**Direct Update**

Direct Update allows you to update a contact's field data and mobile number when they visit a page on your website via an email you send from the application.

---

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You can add or subtract from numerical values, as well as set any field to a specific value. This allows you to easily keep contact data and subscription information up to date without manually importing or updating data.

Direct Update works by specifying a field you want to change, how you want to change it (the operation), and a specific data value. This is accomplished by adding parameters to a URL contained in an image tag in the following format:

```
field1=fieldname,operation,value
```

**Warning:** If you are using a private domain, the following actions should be avoided in order to ensure that Direct Update will work properly:

- Changing the domain in the Direct Update `img` tag `src` attribute.
- Changing the URL in the Direct Update `img` tag `src` attribute to use `https`. Changing this URL to `https` will cause Direct Update to no longer work because we do not host the security certificate.

**Note:** In order for Direct Update to work, a cookie needs to have been set in the contact's browser by the application. The cookie is used to identify the contact so the application knows which contact to update. A cookie is set in a contact's browser when:

- A contact opens an email you send them from the application
- A contact is added to your account via Direct Add and you have the Create Tracking Cookie checkbox checked.
- A contact is added to your account via an Add Contacts webform and you have the Create Tracking Cookie checkbox checked in the form settings.

The cookie will remain for 20 years, provided the contact does not clear the cookies in their browser.

There are several ways you can update contact information (i.e. the information you store in fields) in your account. As an alternative to using Direct Update, you can use a Manage Preferences webform to let contacts update their information. For more information on Manage Preferences webforms, see Webforms. For information on using Direct Add and a Manage Preferences webform to add contacts and simultaneously allow them to choose their preferences, see Direct Add on page 1102.

**Warning:** When using Direct Update, please be mindful of character limits for URLs. We advise URLs to be less than 2,000 characters.

**Related Topics**

- **Webforms** on page 204
  Webforms provide you with a powerful way to sign-up new contacts, collect information from existing/future contacts, and allow your contacts to easily manage their preferences.

- **Direct Add** on page 1102
  Direct Add allows you to add contacts to your account via pages on your website.

**Direct Update URL**
The Direct Update URL works by adding parameters that correspond to fields that you want to update.

You also define how you want to update the field (using operators), and provide a value. For example:

```
http://public_domain/public/?
q=direct_update&fn=Public_DirectUpdateForm&id=IDSTRING&field1=lifetimevalue,add,129.23&field2=lastpurchasedate,set,12/15/2007
```

The first part of the URL is given to you as part of the code snippet you got from the Direct Update section on the Data Exchange page. This is unique to each account and allows the application to identify your account. The next few parameters, `q`, `fn`, and `id` allow us to know how to process the data that is to follow, as well as identify your account. The part of the URL contains the parameters you define:

```
field1=lifetimevalue,add,129.23&field2=lastpurchasedate,set,12/15/2007
```
Some characters that are allowed in a URL are considered reserved characters. A reserved character is a character that can have a special meaning, for example a + symbol. It's a best practice to avoid using reserved characters within an email address (except for @) and you should try to limit your contacts' ability to use them. However, if they do have a reserved character in their email you can encode the character so that it can be used in your URL. For example + would need to be encoded as %2B.

For more information on using operators and adding field data to the Direct Update URL, see Add Field Data To The Direct Update URL on page 1112. For more information on updating contact mobile numbers using the Direct Update URL, see Update A Contact’s Mobile Number Using Direct Update on page 1113.

**Add Field Data To The Direct Update URL**

Adding field data to the Direct Update URL allows you to pass field to the application used to update contact fields.

To add a field to the Direct Update URL, you will need to use the exact spelling of the field. You can see a listing of all your contact fields by going to Tables > Contacts > Fields. Any field can be updated with Direct Update, but some fields only support certain operators.

- **Note:** Before updating any field data using Direct Update, make sure you understand how Direct Update affects different field types. For more information on how Direct Update affects different field types, see How Direct Update Affects Different Field Types on page 1113.

Be sure to use only lower case letters for the operators.

There are 5 different operators:

- **set** - Adds a value to the specified field. If a value already exists in a field, it is replaced by the specified value. Field types supported:
  - number
  - decimal
  - currency
  - date
  - text
  - text area
  - checkbox
  - radio button
  - pull-down

  ```
  http://public_domain/public/?
  q=direct_update&fn=Public_DirectUpdateForm&id=IDSTRING&field1=lastpurchasedate,set,12/15/2012
  ```

- **add** - Increments a numerical value stored in a field. Field types supported:
  - number
  - decimal
  - currency

  ```
  http://public_domain/public/?
  q=direct_update&fn=Public_DirectUpdateForm&id=IDSTRING&field1=lastpurchaseamount,add,25.25
  ```

- **append** - Appends the specified value on to the existing value in a field. This allows you to track multiple values without having to create a large number of individual fields. Field types supported:
  - text
  - text area

  ```
  http://public_domain/public/?
  q=direct_update&fn=Public_DirectUpdateForm&id=IDSTRING&field1=lastitemspurchased,append,socks
  ```
Warning: `append` will add the specified value even if the value already exists. Hence, you could potentially end up with a field in your account that has the same value multiple times. Use `appendifnew` if you want to only append the value if the field value does not already exist.

Note: Values added using the `append` and `appendifnew` operators will show up in fields separated by commas. For example: `value1, value2, value3`.

- **appendifnew** - Appends the specified value to the field only if that value doesn't already exist. Field types supported:
  - text
  - text area

    http://public_domain/public/?
    q=direct_update&fn=Public_DirectUpdateForm&id=IDSTRING&field1=education,append,Masters

    Note: Values added using the `append` and `appendifnew` operators will show up in fields separated by commas. For example: `value1, value2, value3`.

- **sub** - Subtracts numerical values stored in field. Field types supported:
  - number
  - decimal
  - currency

    http://public_domain/public/?
    q=direct_update&fn=Public_DirectUpdateForm&id=IDSTRING&field1=lastpurchaseamount,sub,25.25

How Direct Update Affects Different Field Types

This section contains important information about how different field types handle values passed to them using Direct Update.

Make sure you understand how each field type handles data passed to it via Direct Update before you begin using this feature.

- **number**, **decimal**, and **currency** field types: The value passed in may be a positive or negative number. Decimal values passed in for **number** field types will be rounded accordingly.
- **date** field types: The value passed in must match the date format set for your account. Go to Home > Settings > Formatting to view the date format for your account.

  You can set the value to the current date by using the `set` operator with the value `today`. For example:

    `field1=date,set,today`

- **text** and **text area** field types: The value passed in will need to be URL encoded if it contains any special characters such as ?, &, =, or %.

  Note: Values added using the `append` and `appendifnew` operators will show up in fields separated by commas. For example: `value1, value2, value3`.

- **checkbox** field types only support the `set` operator with a value of 0 for unchecked and 1 for checked.
- **radio button** and **pulldown** field types: The value passed in must match one of the existing options set for the field. They must have the same spelling, case, and any included spaces.

Update A Contact's Mobile Number Using Direct Update

When using Direct Update, you can update the mobile stored for a contact.

To do this, you need to add the **mobileNumber** parameter to the Direct Update URL and then provide the updated mobile number.

For example:
Add Multiple Values To The Direct Update URL

You can update more than one field at a time using Direct Update.

The application supports updating 20 fields per call. Additional updates are included by adding another parameter to the Direct Update URL. Multiple fields are separated by the ampersand character (&). You also need to increment the number after field.

For example:

http://public_domain/public/?
q=direct_update&fn=Public_DirectUpdateForm&id=IDSTRING&mobileNumber=5555555555&field1=lastpurchaseamount,add,25.25&field2=lastpurchasedate,set,7/5/2013

Set Up The Direct Update Image Tag And Add It To Your Site

Once you have a clear understanding of how the Direct Update URL works, you can begin setting up Direct Update.

To setup Direct Update:

1. Go to Home > Settings > Data Exchange.
2. Click the Enable Direct Update for updating contact fields checkbox.
3. Add the Direct Update img tag to a page on your site.

   Warning: If you are using a private domain, the following actions should be avoided in order to ensure that Direct Update will work properly:

   - Changing the domain in the Direct Update img tag src attribute.
   - Changing the URL in the Direct Update img tag src attribute to use https. Changing this URL to https will cause Direct Update to no longer work because we do not host the security certificate.

4. Add parameters to the Direct Update URL which correspond to fields you want to update.

   For more information on using operators and adding field data to the Direct Update URL, see Add Field Data To The Direct Update URL on page 1112.

5. Add values to the field parameter(s).

   There are a number of ways you can accomplish this, with the most common being using JavaScript. The example below is of a page displayed to a contact after they have filled out a form (linked to from an email you sent them from the application) allowing them to update the messages they want to receive from you. The page contains a message confirming the data the person provided/selected (the example below assumes they entered in their first name, last name, number of emails they want to receive per month, and type of emails they want to receive). The page also contains the direct update img tag, and some JavaScript that populates the Direct Update URL with the appropriate data.

   Note: In order for Direct Update to work, a cookie needs to have been set in the contact’s browser by the application. The cookie is used to identify the contact so the application knows which contact to update. A cookie is set in a contacts browser when:

   - A contact opens an email you send them from the application
   - A contact is added to your account via Direct Add and you have the Create Tracking Cookie checkbox checked.
   - A contact is added to your account via an Add Contacts webform and you have the Create Tracking Cookie checkbox checked in the from settings.

   The cookie will remain for 20 years, provided the contact does not clear the cookies in their browser.

   You may need to scroll to the right to see the entire code example below:
Dear Joe Example,

Thank you for signing up to receive messages from Example Entertainment News. You signed up to receive 3 emails per month about:

- Movies
- Music
- Sports

The following variables need to be set to some value that is available on the page, passed in, etc. Where you get these values will be different for each client's web site. Someone who is familiar with the client's web site will have to provide the values based on the type of page (order confirmation, receipt, etc.) shown to users after a form has been filled out.

- firstname
- lastname
- emailfrequency
- contentpref1
- contentpref2
- contentpref3

Note the incrementing number for the field and list parameters (field1...field2.....field3) etc.

Note the different operators (set and appendifnew) used in the Direct Update URL.

Make sure you get the proper Direct Update img tag from the Data Exchange page in your account. The img tag below uses a generic img tag.

```
document.writeln('<img src="http://public_domain/public/?q=direct_update&fn=Public_DirectUpdateForm&id=blkycggbjquivddbdxylaufhfdby&id1=firstname&field2=lastname&field3=emailfrequency&field4=contentpref1&field5=contentpref2&field6=contentpref3" width="0" height="0" border="0" alt=""/>');
```

Direct Import

Direct import allows you to programmatically import contacts contained in a .csv file into the platform by posting a form with various parameters.
For example, if you have a .csv file containing a group of contacts that you want to add to Bronto, you can upload these contacts via a form without having to log in. These contacts can be added to a specific list and their data can be mapped to corresponding contact fields in your account. Direct import supports the use of commas and tabs as delimiters and embedded quotes must be escaped.

At a really high level, direct import works the same as the regular import process in the platform. The difference between direct import and the regular import feature is that you don't actually have to be logged into your account to import contacts via direct import. At a more detailed level, direct import takes parameters specific to your account, uses those parameters to access your account, parses the file you are importing, and then adds the contact data contained in the file to your account.

**Set Up Direct Import**

Direct import allows you to programmatically import contacts contained in a .csv file into the platform by posting a form with various parameters.

**Warning:** Setting up direct import requires some programming knowledge.

For example, if you have a .csv file containing a group of contacts that you want to add to Bronto, you can upload these contacts via a form without having to log in. These contacts can be added to a specific list and their data can be mapped to corresponding contact fields in your account.

After you run an import, you can view the details of the contact import by going to Reports > Report Downloads and clicking on a Report Name in the Contact Import Report Downloads table to download a contact import report. For more information see Legacy Report Downloads Page on page 820.

Direct import supports the use of commas and tabs as delimiters and embedded quotes must be escaped.

To setup direct import:

1. Go to Home > Settings > Data Exchange.
2. Scroll down to the Direct Import section.
3. Make note of the URL and parameters displayed.

This information will be needed in order for direct import to work properly.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Parameter Description</th>
<th>Required Or Optional</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>site_id</td>
<td>Site/Account ID</td>
<td>Required</td>
<td></td>
<td>Your site/account id will be a unique number displayed on the Data Exchange page in the Direct Import section.</td>
</tr>
<tr>
<td>user_id</td>
<td>User ID</td>
<td>Required</td>
<td></td>
<td>Your user id will be a unique number displayed on the Data Exchange page in the Direct Import section.</td>
</tr>
<tr>
<td>Parameter Name</td>
<td>Parameter Description</td>
<td>Required Or Optional</td>
<td>Default</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------</td>
<td>----------------------</td>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td>key</td>
<td>Authentication Token</td>
<td>Required</td>
<td></td>
<td>The authentication token will be a unique string displayed on the Data Exchange page in the Direct Import section.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Warning: This is not the same as an API token.</td>
</tr>
<tr>
<td>filename</td>
<td>Name Of The File</td>
<td>Required</td>
<td></td>
<td>The contact file contents to be processed, including the required header row.</td>
</tr>
<tr>
<td>format</td>
<td>File Format</td>
<td>Required</td>
<td></td>
<td>Specify csv, tab or txt for the file format.</td>
</tr>
<tr>
<td>source</td>
<td>Source Of The Contacts</td>
<td>Required</td>
<td></td>
<td>Specify the source that the contacts were obtained from.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Tip: If a source is provided, it will appear on the Contact Details for that contact. For more information, see Contact Details General Information on page 911.</td>
</tr>
<tr>
<td>action</td>
<td>Action To Take</td>
<td>Optional</td>
<td>addupdate</td>
<td>Specify add, update, addupdate, or addupdate_transactional for the action.</td>
</tr>
<tr>
<td>Parameter Name</td>
<td>Parameter Description</td>
<td>Required Or Optional</td>
<td>Default</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------</td>
<td>----------------------</td>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td>listname</td>
<td>List Name</td>
<td>Optional</td>
<td>&lt;no list&gt;</td>
<td>Specify the name of the list to add the contacts to. If the list name does not exist, it will be created.</td>
</tr>
<tr>
<td>email</td>
<td>Notification Email Address</td>
<td>Optional</td>
<td>&lt;no email&gt;</td>
<td>The email address to send the confirmation report to.</td>
</tr>
<tr>
<td>consent_date</td>
<td>Consent Date</td>
<td>Optional</td>
<td></td>
<td>The date of the last change or addition to the consent log for the contact. You can see the existing Consent Date for a contact by exporting all site consent records or exporting a single contact's consent records.</td>
</tr>
<tr>
<td>consent_ip_address</td>
<td>Consent IP Address</td>
<td>Optional</td>
<td></td>
<td>The IP address that is associated with a consent record. You can see the existing Consent IP Address for a contact by exporting all site consent records or exporting a single contact's consent records.</td>
</tr>
<tr>
<td>Parameter Name</td>
<td>Parameter Description</td>
<td>Required Or Optional</td>
<td>Default</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------</td>
<td>----------------------</td>
<td>--------------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| fileCharacterEncoding | Character Set Encoding | Optional             | UTF-8 or ISO-8859-1      | Allows you to specify a character set encoding to apply to your direct import. Acceptable values are:  
  • UTF-8 For UTF-8  
  • ISO-8859-1 For Latin-1  
  • UTF-16 For UTF-16  
  • UTF-16BE For UTF-16 Big Endian  
  • UTF-16LE For UTF-16 Little Endian  
  • US-ASCII For ASCII  

If you do not specify the `fileCharacterEncoding`, Bronto will attempt to import and validate the imported data as UTF-8. If Bronto determines that the file was not using UTF-8, the platform will then import the file(s) using ISO-8859-1 (Latin 1). This does not guarantee the files are using the ISO-8859-1 (Latin 1) character set. You should look at the contact data you imported to make sure it was stored as expected. Pay particularly close attention to any special characters your data may have, such as é.
<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Parameter Description</th>
<th>Required Or Optional</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
</table>
| inAppAlertMode       | Sets Platform Alert Preferences | Optional             | none    | Indicates whether you want to receive an alert in Bronto when the import finishes. The alert will contains details about the success or failure of the direct import. Acceptable values are:  
  • none No alert will be sent; this is true even if there are failures with the import  
  • user An alert will only be sent to the Bronto user who was associated with the direct import  
  • site All users on the site will receive the alert |

| preserveTransactionalStatus | Locks Transactional Status | Optional | True | When you include this parameter the status of existing transactional contacts included in the import will not change. By default, a direct import will change a contact's status from transactional to onboarding unless you include this parameter. Unless your import is meant to change the status for these contacts because they opted-in, you should use this parameter as part of any import that includes existing transactional contacts. |

Note: The parameter names and values are case sensitive and should be lowercase.
4. Using the URL and parameter information obtained from the previous step, post the data to your account. There are several ways to accomplish this task. One method is to use `curl`. For example:

```bash
curl -F 'source="Test contacts"' -F 'filename=@subscribers.csv' -F 'format=csv' -F 'fileCharacterEncoding=ISO-8859-1' -F 'site_id=XXXX' -F 'user_id=XXXXX' -F 'key=XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX' http://app.example.com/mail/subscriber_upload/index/
```

Note: There are a few mistakes that could cause an import to fail. For example, specifying the wrong character set or wrong file format. Also, if you are uploading a CSV file, the heading for the email column must be `email`.

5. An import summary report can be viewed by going to Reports > Report Downloads. Additionally, an email will be sent if you specified an email address to be notified when the import is finished.

Related Topics

Legacy Report Downloads Page on page 820
The Report Downloads page is where you can access and download reports you have run or reports related to your contact import activity. You can access this page by going to Reports > Legacy Downloads.

Initial Product Data Feed Import Process

You must follow a specific process to import product data into Bronto for the first time.

To import data for the first time:

1. Set up your product data feed.
   
   See Product Data Feed Set Up on page 1122.

   Tip: If you already have a product data feed that meets Google’s product feed specification you can use this feed.

2. Log into Bronto and configure your data feed format settings.
   
   See Configure Your Product Feed Settings on page 1126.

3. While you're on this page, also configure your import settings if you want to automatically keep your product data updated in the future.
   
   You still need to map your fields and perform a manual import for the automatic import process to be successful.

4. Map the product attributes in your feed to Bronto fields.
   
   See Map Product Fields on page 1130 and Product Field Descriptions on page 1130.

   Note: If you want to map your products to custom fields, you will need to create the custom fields.
   
   See Create a Custom Product Field on page 1134.

5. Manually start the import of your data.
   
   See Import a Product Feed Manually on page 1141.

6. Verify your data was imported successfully.
   
   See View Product Reports on page 1143.

Related Topics

Products

Product Search on page 1018
The Product Search page allows you to quickly search through imported product data.
**Product Data Feed Set Up**

A product data feed is a file that contains all of your products and the attributes associated with each product. Product data feeds are created and managed outside of Bronto. Therefore, you need to configure product data feeds outside of Bronto before you can import your product information. If you already use a product data feed for another company, such as Google, you can leverage your existing product data feed to import your product data. If you do not have a product data feed, you will need to create this file before you can import product data into Bronto.

Bronto supports data feeds in a delimited file or an XML document format.

**General File Considerations**

The type of file you use for your feed will determine how it's formatted but there are a few things you need to have in your file no matter which format you use:

- You must have product attribute labels (a heading). In a delimited file this is the first row of data and in an XML file these will be formatted as tags. Either way these attribute "headings" are the values you will map to product data fields in Bronto. Mapping the attribute label/heading to the product data field lets Bronto know how to store each piece of data.
- The data you import must be properly associated with its label (in the heading). For example, if you have a product attribute heading **Title** then it is important that you make sure the title for each product is properly associated with the **Title** label. In an delimited file this is accomplished using delimiters properly and in an XML file this is accomplished through tagging. A good rule of thumb it to test upload a small file to make sure everything is mapped properly before your upload everything.
- At a minimum your file must have product attributes that can be mapped to Bronto's **Product ID** and **Title** fields in order for it to be imported properly. However, you should include any product attribute you might want to use in a message, to build a recommendation, or might want Bronto to use in its predictive analytics calculations. A rich set of product data in your product catalog is one of the key components in Bronto's ability to recognize connections between products in order to provide highly-targeted recommendations.
- Properly map relationships between variant products using the **Product ID** and **Parent Product ID** fields. When you have products that are variants of each other it's important you have a single product that is the parent to all of the other variant products. The parent product should not have anything in the **Parent Product ID** field. The variants of that parent product should have the parent's **Product ID** in their **Parent Product ID** fields. This allows Bronto to recognize these products are related and use their connections to build recommendations.

Products that are in the most recent product data feed file and are successfully imported have an active status in Bronto. When an active product is not included in a subsequent product feed import that product is archived. This is important for two reasons. First, it's important you understand the data in your product data feed should reflect what you want your full Bronto product catalog to look like. You cannot import a file that only contains a few products in order to add them to your catalog. If you did that then everything else already in your catalog would be archived!

Secondly, while products that are archived cannot be used in messages, Bronto can still use archived products in analytics calculations for recommendations. As you perform your initial data feed imports into Bronto, it's a best practice to first import a product data feed that only contains historical product data. For example, products you don't sell anymore. Then, immediately after that import finishes, import a product data feed that represents your current catalog and doesn't contain the historical product data. Your historical products will be archived so you don't have to worry about accidentally using them. But Bronto can use historical data associated with these products to make better recommendations for current products. The more historical product data we have the more accurate product recommendation will be.

**Delimited File**

A delimited file is a document that contains rows of data where each data element is separated by a delimiter and each line represents a new item. You can use tabs, pipes, commas, colons, semi-colons or tildes as the delimiter in your delimited file. You must consistently use the same delimiter in the file. Whatever delimiter you use cannot be used within a field, unless the contents of the field is within quotation marks. For example, if you use a comma as your delimiter, you cannot use a comma to offset items in an attribute list unless the list is in quotation marks.

Example of simple delimited file

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Example of complex delimited file

SKU, Parent, Brand, Title, sale_price, sale_price_effective_end_date, sale_price_effective_start_date, Margin, Image_URL, Product_URL, Quantity, Thumbnail, Rating, Reviews, Additional_Images, Description, Product_Whitelist, Product_Blocklist
PRO_0001, Bronto, Baby Bronto Hat, ..., 27, http://brontogear.com/media/catalog/product/cache/1/image/9df78eab33525d08d6e5fb8d27136e95b/r/b/rontosportscard.png, Keep your baby Bronto's nose and ears protected.
PRO_0002, Bronto, Beach Towel, 27, 50, http://brontogear.com/media/catalog/product/cache/1/image/9df78eab33525d08d6e5fb8d27136e95b/r/r/brontobeachtowel.png, This oversized beach towel will keep you warm and fuzzy green fleece blanket with Bronto in the corner.
PRO_0003, Bronto, Blankets, 15, 40, http://brontogear.com/media/catalog/product/cache/1/image/9df78eab33525d08d6e5fb8d27136e95b/r/r/brontobedcotton.png, Available in one size and one color. The adjustable neck strap and reinforced waist ties will ensure a good fit.
PRO_0004, Bronto, Baseball Hat, 5, 55, http://brontogear.com/media/catalog/product/cache/1/image/9df78eab33525d08d6e5fb8d27136e95b/r/r/brontobaseball.png, and be the most stylish at the game.

**XML File**

If your product data feed is stored as an XML document:

- You must specify tags for all mapped fields, even if the value is null, or the row will be rejected and not update.
- Supported configurations include RSS 2.0 and Atom 1.0.
- Any mapped product field not specified in the XML file is treated as a null value. If a product field previously had a value and you re-import the product without that field specified, the field value is updated to null.

Example of an XML file
There is no limit to the number of attributes a product data feed may have, but only attributes that have been mapped to a Bronto field are imported. At a minimum, each product must have a **Product ID** and a **Title**. Each mapped attribute must validate against the rules for the Bronto field it is mapped to or it will not import successfully. For more information about field format and validation rules see [Product Field Descriptions](#) on page 1130.

### Validation Troubleshooting

Validation tips:

- **Currency**: Only one currency is supported per feed and the currency type is not saved in Bronto.
- **Images**: Image files are not stored in Bronto, so the image attribute must be a valid URL link to an image. If you want to use different image sizes, you will need to create additional image fields and pass each image URL in the product data feed that is mapped to those image fields.
- **Textarea**: Textarea fields have a 5,000 character limit. Any characters past 5,000 will be cut off during import and will produce a warning in the import transaction log report.
- **URLs**: Any field that is a URL must begin with `http://` or `https://` or the product is not imported and an error is produced in the import transaction log report.
Google's Sale Price Effective Date contains two dates separated by a slash that represent the start and end date of a sale. If your product data feed uses Google's Sale Price Effective Date, and you want to import this attribute, Bronto has set up predefined fields you can use to split this attribute into a start date field and an end date field in order to be able to better view and use these dates. To do this:

1. Map the name you use for Google's Sale Price Effective Date in your product data feed to **Sale Price Effective Start Date** and add :STARTDATE to the product data feed name.
2. Map the name you use for Google's Sale Price Effective Date in your product data feed to **Sale Price Effective End Date** and add :ENDDATE to the product data feed name.

For example, if the heading for Google's Sale Price Effective Date in your product data feed is **SalesDates**, you would map **SalesDates:STARTDATE** to **Sale Price Effective Start Date** and **SalesDates:ENDDATE** to **Sale Price Effective End Date**.

Related Topics

Video: Import Delimited Product Data Feed File

Related Topics

Video: Import XML Product Data Feed File

**Product Configuration Overview**

Before you can import product data feeds, you need to configure your feed settings so Bronto knows how to properly handle your data feed file.

You can do this on the **Configure Import Feed** page. The **Configure Import Feed** page is also where you configure automatic imports and indicate whether you want to receive reports via email.

**Note:** If you use a connector to import product data into Bronto, you cannot manually import product data. Therefore, all of the options related to uploading product data are disabled. You can still view product fields and search for product data.

**Set Product Email Notification Preferences**

You can receive email notifications that your product feed data has been imported.

To receive email notifications:

1. Go to **Tables > Products > Overview**.
2. Click **Configure Import Feed**.
3. Under **Communication Information**, check the **Send Email Notifications** box.
   
   If you want to stop receiving email notifications, uncheck the **Send Email Notifications** box.
4. Enter your name in the **Contact Name** box.
5. Enter the email address you want notifications sent to in the **Email Address** box.
6. Enter the same email address in the **Confirm Email** box.
7. Click

   • **Save Changes** to save your changes and stay on the page
Important:

- Save and Close to save your changes and return to the Product page

If you want to stop receiving email notifications, uncheck the Send Email Notifications box.

**Configure Your Product Feed Settings**

Before you can perform the initial import of your feed, you need to configure the format of your feed. This lets Bronto know how to process the data within your feed.

To configure your feed format:

1. Go to Tables > Products > Overview.
2. Click Configure Import Feed.
3. Select the feed's file type from the Feed Format list.
   - A Delimited file is a document that contains rows of data where each data element is separated by a delimiter and each line represents a new item.
4. If you selected Delimited:
   a) Select the delimiter value from the Field Delimiter list.
      - This is the character that indicates a separation in values between different attributes in your feed.
   b) If your delimited product data feed contains fields defined as Multi, select the delimiter from the Multi-Field Delimiter list.
      - Multi is a collection of values for a single attribute that are separated by a "multi-field" delimiter. Multi cannot use the same delimiter as the Field Delimiter. For more information on the Multi data type, see Product Field Data Types on page 1135.
5. If your data feed uses quotation marks to set off field content, check the Use Quoted Fields box.
   - Typically, you would use quotes around a field when you use the same character you use as your delimiter within the field.
6. If you use a format other than the standard date format, check the Use a Custom Date Format box and enter the desired date format in the Date Format text box.
   - The specified date format must match the format for all product data feed date fields. For more information about date formatting options, see Date Format Glossary on page 1126.
7. Click
   - Save Changes to save your changes and stay on the page.
   - Save and Close to save your changes and return to the Products Overview page.

**Date Format Glossary**

The available options for the custom date field are defined below.
<table>
<thead>
<tr>
<th>Letter</th>
<th>Description</th>
</tr>
</thead>
</table>
| G      | Era designator  
         | Example: AD |
| y      | Year  
         | Example: 1996 or 96 |
| Y      | Week year  
         | Example: 2009 or 09 |
| M      | Month in year  
         | Example: July or Jul or 07 |
| w      | Week in year  
         | Example: 27 |
| W      | Week in month  
         | Example: 2 |
| d      | Day in month  
         | Example: 20 |
| D      | Day in year  
         | Example: 189 |
| F      | Day of week in month  
         | Example: 2 |
| E      | Day name in week  
         | Example: Tuesday or Tue |
| u      | Day number of week (1 = Monday; ..., 7 = Sunday)  
         | Example: 1 |
| a      | Am/pm marker  
         | Example: AM |
| H      | Hour in day (0-23)  
         | Example: 0 |
| k      | Hour in day (1-24)  
         | Example: 22 |
| K      | Hour in am/pm (0-11)  
         | Example: 2 |
| h      | Hour in am/pm (1-12)  
         | Example: 12 |
Configure Product Automatic Import Settings

The Product Configuration page is where you can set the automatic import settings for your data feed. When you specify a URL or FTP location, Bronto scans the location specified once per day for your product data feed. If a newer version of the previously imported feed is detected, the contents of the feed are imported. It's important to note that imports are progressive. During import, the data feed is compared to the product data stored in Bronto and any existing data that does not match the new product data feed is changed. This means that you cannot upload partial files or the previously imported product data that is not included in the new file will be archived.

The automatic import process will not occur again until the next day. If you encounter an issue with the data in the automatic import that needs to be corrected before then, you can use the manual import process to import a new data feed with your corrections.

Note: When using FTPS for nightly automated pulls of the feed file, the FTPS site must be set to Explicit. If it is set to Implicit, the connection will fail.

Because Bronto needs access to your FTP or HTTP site to perform the nightly scan, you may need to configure your server to give us access. If so, the following are the specific IP address ranges that may attempt to connect:
- 216.27.63.0/24
- 69.166.148.0/24

To configure automatic product data feed imports:

1. Go to Tables > Products > Overview.
2. Click Configure Import Feed.
3. Select FTP or HTTP from the Do you want Bronto to automatically look for a new feed file nightly? list.
4. Select the time you want the import to run by selecting:
   a) An hour of day from the Import Hour list.
   b) AM or PM from the Import AM/PM list.
5. If using HTTP, enter the location where the product data feed is stored in the Feed URL box.

Note:

<table>
<thead>
<tr>
<th>Letter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>m</td>
<td>Minute in hour&lt;br&gt;Example: 30</td>
</tr>
<tr>
<td>s</td>
<td>Second in minute&lt;br&gt;Example: 40</td>
</tr>
<tr>
<td>S</td>
<td>Millisecond&lt;br&gt;Example: 978</td>
</tr>
<tr>
<td>z</td>
<td>Time zone&lt;br&gt;Example: Pacific Standard Time or PST or GMT-08:00</td>
</tr>
<tr>
<td>Z</td>
<td>Time zone&lt;br&gt;Example: -0800</td>
</tr>
<tr>
<td>X</td>
<td>Time zone&lt;br&gt;Example: -08 or -0800 or -08:00</td>
</tr>
</tbody>
</table>

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6. If using FTP:
   a) Enter the location where the product data feed is stored in the **FTP Server Address** box. You need to specify the port number at the end of the server address. You can do this by following the server address with a colon and the port number. For example: `ftps://ftp.bronto.com:4021`.
   b) Enter the login credentials in the **FTP Username** box.
   c) Enter the login password in the **FTP Password** box.
   d) Enter the login password again in the **Confirm Password** box.
   e) Enter the product data feed file name, or partial file name, in the **Filename Matching Pattern** box.

   The **Filename Matching Pattern** is how you define the file name for your product data feed. When Bronto scans the FTP site it looks for files that match this file name format. This value is case sensitive. If you only want to provide a partial file name, use a * to represent the rest of the name.

   ![FTP Form](image)

7. Click
   - **Save Changes** to save your changes and stay on the page.
   - **Save and Close** to save your changes and return to the **Products Overview** page.

For FTP and FTPS imports, Bronto checks for the existence of a file that matches the file name pattern. If one is found, the file is imported only when the data feed's timestamp is later than the timestamp of the last successful file import.

**Note:** The file timestamp is based on the FTP site's time zone. If that time zone is different from the your site's time zone, the comparison might incorrectly believe the file is newer or older than the last successful import and process it accordingly. To avoid this issue, make sure the FTP time zone and your site's time zone is set to the same value.

For HTTP and HTTPS imports, Bronto checks for the last modified date in the response header. The import is completed only if that datetime is later than the datetime of the last successful import. If no last modified date appears in the response header, Bronto assumes the file is the most current and completes the import.

### Product Fields

Product fields are the Bronto terminology for product attributes. You can use product fields to store information about your products.

Bronto provides 28 predefined fields and allow you to create up to 50 more custom fields.

Before you import product data, you need to map the product attribute headings, or the tags, in your product data feed to product fields in Bronto. This ensures that your product data is imported properly. You do not have to map every product attribute in your file, but any attribute that is not mapped to a Bronto field is not imported.
For example, if you have a product **Item Price**, you would map **Item Price** to the Bronto field **Price**. If you do not map **Item Price**, then the prices for your products are not imported. If you map **Item Price** to the field **Image URL**, then the prices are not imported, and an import error will occur, because price is not a URL.

To view the list of available fields, go to the **Tables > Products > Overview** page then click **View Product Fields**. All available fields are shown, sorted alphabetically.

In additional to product fields, Bronto provides a subset of commerce fields that are used to store revenue and sales data for products. These fields cannot be modified. See **Commerce Fields** on page 1137 for more information.

### Map Product Fields

Before you import product data, you need to map the headings (attribute categories) or tags in your product data feed to fields in Bronto. Without the mapping, Bronto does not know what product data to import from your file.

You do not need to map every field in your file. Only map the product attributes you want to import. But if you want to import an attribute, you must map it to a product field. Even attribute headings that exactly match the name of a Bronto field need to be mapped. If you map a field, that field must be found in the product data feed or the import will fail.

**Note:** If you use a connector to import product data into Bronto, you cannot manually import product data. Therefore, all of the options related to uploading product data are disabled. You can still view product fields and search for product data.

If your product data feed is an XML document, you must map the full tag name, including the prefix.

For a description of the predefined Bronto fields, see **Product Field Descriptions** on page 1130.

**Tip:** At a minimum, the **Product ID** and **Title** fields must be mapped in order for your import to be successful.

You can update your mappings at any time. Once you have currently active products, you cannot save changes to this page if you have removed the **Product ID** or **Title** required mappings.

To map your fields:

1. Go to **Tables > Products > Overview**.
2. Click **Map Product Fields**
3. Locate the field you want to map a product attribute to.
   - For a description of the predefined Bronto fields, see **Product Field Descriptions** on page 1130.
4. Enter the product attribute heading or tag from your data feed into the relevant **Mapping** box.
   - If the heading in your data feed is an exact match for a **Field Label** or **Field Name**, you can use the copy button to copy the label or name into the **Mapping** box.
5. Repeat steps 3 and 4 until you have mapped all the attributes you want to import to Bronto fields.
   - At a minimum, the **Product ID** and **Title** fields must be mapped in order for your import to be successful.
6. Click
   - **Save Changes** to save your changes and stay on the page.
   - **Save and Close** to save your changes and return to the **Products Overview** page.

### Product Field Descriptions

Bronto provides predefined fields that you can use to map your product data. These fields are based on Google's Product Feed Specification, so if you use Google product feeds you should be able to easily map your data to these fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age Group</td>
<td>Target age group for the product. Example: adult</td>
<td>Data Type: String Max Length: 50 characters</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Rules</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Availability</strong></td>
<td>Availability status of the product. Example: in stock</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 100 characters</td>
</tr>
<tr>
<td><strong>Availability Date</strong></td>
<td>Date a pre-order product will be available. Example: 2015-06-01T12:00-0800</td>
<td>Data Type: Date - must follow ISO 8601 standard</td>
</tr>
<tr>
<td><strong>Average Rating</strong></td>
<td>Current average rating of the product. Example: 4.25</td>
<td>Data Type: Double</td>
</tr>
<tr>
<td><strong>Brand</strong></td>
<td>Brand of the product. Example: BrandX</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 70 characters</td>
</tr>
<tr>
<td><strong>Color</strong></td>
<td>Color of the product. Example: red/black</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 100 characters</td>
</tr>
<tr>
<td><strong>Condition</strong></td>
<td>Description of the condition of the product. Example: new</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 100 characters</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Description of the product. Example: Red and black plaid cotton skirt</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 5000 characters</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td>Target gender for the product. Example: female</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 50 characters</td>
</tr>
<tr>
<td><strong>GTIN</strong></td>
<td>The global trade item number. Example: 1234567891234</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 50 characters</td>
</tr>
<tr>
<td><strong>Image URL</strong></td>
<td>URL for the main image for the product. Example: <a href="https://www.mystore.com/images/SKT_REDBLACK_12345.jpg">https://www.mystore.com/images/SKT_REDBLACK_12345.jpg</a></td>
<td>Data Type: URL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Max Length: 2000 characters</td>
</tr>
<tr>
<td></td>
<td>Images are not stored within Bronto, so the feed can only pass URLs referencing images on an external website. If you want to use different image sizes, you will need to create additional image fields and pass each image URL in the product data feed that is mapped to those image fields. Fields with a URL data type must begin with http:// or https:// or the record will not be saved and an error will be logged</td>
<td></td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Rules</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>Inventory Threshold</td>
<td>A product-specific minimum quantity level a product should meet in order for it to be promoted.</td>
<td>Data Type: Double</td>
</tr>
<tr>
<td>ISBN</td>
<td>The international standard book number.</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td>Example: 4564564561</td>
<td>Max Length: 100 characters</td>
</tr>
<tr>
<td>Margin</td>
<td>Gross margin percentage of the product.</td>
<td>Data Type: Double</td>
</tr>
<tr>
<td></td>
<td>Example: 0.427</td>
<td></td>
</tr>
<tr>
<td>Mobile URL</td>
<td>URL representing the mobile product page on the merchant’s website.</td>
<td>Data Type: URL</td>
</tr>
<tr>
<td></td>
<td>Example: <a href="https://m.mystore.com/SKT_REDBLACK_12345.asp">https://m.mystore.com/SKT_REDBLACK_12345.asp</a></td>
<td>Max Length: 2000 characters</td>
</tr>
<tr>
<td></td>
<td>Fields with a URL data type must begin with http:// or https:// or the record will not be saved and an error will be logged</td>
<td></td>
</tr>
<tr>
<td>MPN</td>
<td>The manufacturer part number.</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td>Example: ABC123</td>
<td>Max Length: 70 characters</td>
</tr>
<tr>
<td>Parent Product ID</td>
<td>Identifier used to group variants of the same product. The parent product ID should match the Product ID for the product in your catalog that is the parent to this group of product variants.</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td>When a product is used as a parent product that product should not have a Parent Product ID.</td>
<td>Max Length: 100 characters</td>
</tr>
<tr>
<td></td>
<td>Example: SKT_001</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>List price of the product.</td>
<td>Data Type: Currency</td>
</tr>
<tr>
<td></td>
<td>Example: 29.99 USD</td>
<td>Bronto only supports one currency type per feed, so we do not save the currency type. In the example, Bronto imports 29.99, but not USD.</td>
</tr>
<tr>
<td>Product Blacklist</td>
<td>Comma separated list of product ID that Recommendations Premium can use as an exclusion list.</td>
<td>Data Type: Product List</td>
</tr>
<tr>
<td></td>
<td>Example: product1, product2, product3</td>
<td>The maximum length is 10,000 characters</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Rules</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Product Category** | Most relevant category of the product. Typically mapped to Google's Google Product Category field. Example: Apparel and Accessories > Clothing > Skirts | Data Type: String  
Max Length: 750 characters  
Product Category should only be mapped to a product attribute that has a single category. |
| **Product ID**     | Unique identifier for the product. This is the ID that is sent to Bronto for products that have been ordered or placed in a cart. Example: SKT_BLACKWHITE_12345 Note: Product IDs are case sensitive. If a file contains two Product IDs that are identical except for capitalization differences, both are imported as separate products. When you have a group of products that are variants of a parent product, the Product ID for the parent product should be provided as the Parent Product ID for the other products. The product that is the parent product should not have a Parent Product ID of its own. | Data Type: String  
Max Length: 50 characters |
| **Product Type Multi** | A delimited list of product categories for the product. Example: Apparel and Accessories > Clothing > Shoes, Apparel and Accessories > Clothing > Sneakers, Apparel and Accessories > Clothing > Footwear | Data Type: Multi  
Max Length: 750 characters |
| **Product URL**    | URL representing the product page on the merchant's website. Example: https://www.mystore.com/SKT_REDBLK_12345.asp | Data Type: URL  
Max Length: 2000 characters  
Fields with a URL data type must begin with http:// or https:// or the record will not be saved and an error will be logged. |
| **Product Whitelist** | Comma separated list of product ID that Recommendations Premium can use as an inclusion list to limit recommendation results. Example: product1, product2, product3 | Data Type: Product List  
The maximum length is 10,000 characters. |
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quantity</strong></td>
<td>Current in-stock quantity of the product.</td>
<td>Data Type: Long</td>
</tr>
<tr>
<td></td>
<td>Example: 52</td>
<td></td>
</tr>
<tr>
<td><strong>Review Count</strong></td>
<td>Current number of reviews of the product.</td>
<td>Data Type: Integer</td>
</tr>
<tr>
<td></td>
<td>Example: 12</td>
<td></td>
</tr>
<tr>
<td><strong>Sale Price</strong></td>
<td>Sale price of the product.</td>
<td>Data Type: Currency</td>
</tr>
<tr>
<td></td>
<td>Example: 23.99 USD</td>
<td>Bronto only supports one currency type per feed, so we do not save</td>
</tr>
<tr>
<td></td>
<td></td>
<td>the currency type. In the example, Bronto imports 23.99, but not</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USD.</td>
</tr>
<tr>
<td><strong>Sale Price Effective Start Date</strong></td>
<td>The date and time the sale starts.</td>
<td>Data Type: Date</td>
</tr>
<tr>
<td></td>
<td>Example: 2015-06-01T12:00-0800</td>
<td>The date format must meet ISO 8601 standards.</td>
</tr>
<tr>
<td><strong>Sale Price Effective End Date</strong></td>
<td>The date and time the sale ends.</td>
<td>Data Type: Date</td>
</tr>
<tr>
<td></td>
<td>Example: 2015-06-01T12:00-0800</td>
<td>The date format must meet ISO 8601 standards.</td>
</tr>
<tr>
<td><strong>Size</strong></td>
<td>Size of the product.</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td>Example: M</td>
<td>Max Length: 100 characters</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>Title of the product.</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td>Example: Womens Plaid Skirt</td>
<td>Max Length: 150 characters</td>
</tr>
<tr>
<td><strong>UPC</strong></td>
<td>The universal product code.</td>
<td>Data Type: String</td>
</tr>
<tr>
<td></td>
<td>Example: 789456123789</td>
<td>Max Length: 100 characters</td>
</tr>
</tbody>
</table>

**Create a Custom Product Field**

You should always try to map product attributes to an existing, relevant Bronto field because predefined fields can be used in report metrics. However, if you do not find a relevant product attribute in the list of fields provided, you can create a custom field for your product data.

Bronto has provided a list of industry standard fields you can pick from when you create a custom field. If you use a Google data feed, your custom field is probably in this list, but you also have the option of defining your field without selecting from the list.

The data type of a custom field cannot be changed after the field is created. This is to ensure that existing references to the field are not broken by these changes. You can edit a custom field's label and description after creation.

To create a custom field:

1. Go to **Tables > Products > Overview**.
2. Click **Map Product Fields**.
3. Click **Add Fields**.
4. To add a standard Google Field, select the field from the **Google Fields** list.

   When you select a Google field, the data type and label are defined for you.
5. To add your own custom field:
   a) Enter a field name in the **Label** box.
   b) Enter a field description in the **Description** box.
   c) Select the field's data type from the **Type** list.

   For more information, see *Product Field Data Types* on page 1135.

6. Click
   - **Save and Add Another** to save your changes and stay on the page.
   - **Save Changes** to save your changes and return to the *Product Overview* page.

**Product Field Data Types**

When you create a custom field you must specify the field's data type. The data type cannot be changed once the field is created.

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
<td>Datetime value that matches the date format specified in the feed configuration. If no time is specified, T00:00:00.000+0000 is appended, which represents midnight (0 hours, 0 minutes, 0 seconds at GMT). Example: 2015-01-27T13:57:30.829+0000</td>
</tr>
<tr>
<td><strong>Currency</strong></td>
<td>Currency value, not including the currency type. All products must have the same currency type. The maximum number of decimal places allowed is 4. Example: 15.99</td>
</tr>
<tr>
<td>Data Type</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| **Text** | Short text value. The maximum number of characters allowed in a Text field is 500.  
Example: Brown |
| **Textarea** | Long text value. The maximum number of characters allowed in a Textarea field is 5,000.  
Example: This warm hat is made of 100% cotton...and comes in various colors. |
| **Long** | A whole number with no decimal places (i.e. an integer).  
Example: 25 |
| **Double** | A number with decimal places.  
Example: 25.999 |
| **Boolean** | True or false value.  
Example: True |
| **Multi** | A collection of values for a single attribute that are separated by a "multi-field" delimiter. This delimiter must be specified in the feed configuration. The maximum number of characters allowed in a Multi field is 10,000.  
**Note:** The multi-field delimiter must be a different value than the delimiter.  
| **URL** | A short text value that is specific to a URL address. The URL must start with http:// or https://. The maximum number of characters allowed in a URL field is 2,000.  
Example: http://www.mysite.com |
| **ID** | String used to store unique identifiers, such as Product ID, UPC, and MPN.  
**Note:** Parent Product ID is not stored as an ID because it is not unique. Several different products can have the same Parent ID.  
During import, any leading or trailing spaces are removed. When you request Product IDs for messages, you will need to use the trimmed version of the ID.  
Example: ShirtsAB123 |
| **Product List** | A comma delimited list of product IDs up to 10,000 characters. This data type should only be used for the Product Whitelist and Product Blacklist product fields.  
Example: product1, product2, product3 |
Edit a Custom Product Field

You can update a custom field's label and description, but you cannot change its data type. This ensures that any marketing message currently using the field are not broken when the field is changed.

To edit your custom field:

1. Go to Tables > Products > Overview.
2. Click Map Product Fields.
3. Locate your custom field in the Product Fields list and click the Edit button.
   The Edit button is located to the far right in the custom field's row.
4. Enter the new field label in the Label box and/or description in the Description box.
5. Click Save.

Delete a Custom Product Field

Before you import data associated with a custom field, you can delete the custom field and create a new custom field with the same name. You may want to do this if you created a custom field with the wrong data type associated with it.

You can still delete a custom field after it is mapped and imported data has been associated with it. However, you will not be able to create a new custom field with the same name until after the next file import completed. When you delete a mapped custom field that has associated data, the field and its data is deleted during the next file import. Deleting a field could break messages that use the field, so make sure the field isn't used in marketing campaigns before it is deleted.

To delete your custom field:

1. Go to Tables > Products > Overview.
2. Click View Product Fields.
3. Locate your custom field in the Product Fields list and click the Delete button.
   The Delete button is located to the far right in the custom field's row.
4. Click OK.

Commerce Fields

Commerce fields are product fields that are automatically generated and populated with revenue and sales data by Bronto.

When accounts that use order service store product data in Bronto, Bronto collects and stores order data for each active product in special commerce fields. These fields cannot be manually edited, but can be used to view:

- the number of units sold during a set period of time.
- the revenue for a product during a set period of time. The revenue based fields do not take currency into account, so if your store uses multiple currencies they are all added together without conversion.
- trends in the popularity of products. Trends can be based on the either number of units sold or the product revenue. Trends can be viewed as short trends (a comparison to the last 30 days) or long trends (a comparison to the last year). A one means there is no change in the trend, a number greater than one means the product has increased in units sold or revenue, and a number less than one means the product has decreased in units sold or revenue.

Use the Product Search on page 1018 page to view these fields for individuals products. Bronto updates these values once per day with the sales from the previous day. Therefore these fields will not reflect the most recent sales but will never be off by more than 48 hours. This data is not collected for archived products and all commerce fields will display a zero for these products.

For customers who use Recommendations, these fields can be used as criteria and/or priorities when building recommendations and several recommendation templates have been built using these commerce fields. When using these fields for criteria, keep in mind that new products may have a skewed positive or negative result due to brand awareness. To avoid over-promoting these products you might want to use a filter to eliminate newer products from
consideration. See Create A Standard Recommendation on page 1419 or Create A Premium Recommendation on page 1423 for more details.

The available commerce fields are listed in the following table.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>units_sold_7</td>
<td>Number of units that have been sold in the last 7 days.</td>
</tr>
<tr>
<td>units_sold_30</td>
<td>Number of units that have been sold in the last 30 days.</td>
</tr>
<tr>
<td>units_sold_90</td>
<td>Number of units that have been sold in the last 90 days.</td>
</tr>
<tr>
<td>units_sold_365</td>
<td>Number of units that have been sold in the last 365 days.</td>
</tr>
<tr>
<td>revenue_7</td>
<td>Total sales amount for the last 7 days.</td>
</tr>
<tr>
<td>revenue_30</td>
<td>Total sales amount for the last 30 days.</td>
</tr>
<tr>
<td>revenue_90</td>
<td>Total sales amount for the last 90 days.</td>
</tr>
<tr>
<td>revenue_365</td>
<td>Total sales amount for the last 365 days.</td>
</tr>
</tbody>
</table>
| units_sold_7_short_trend | A comparison of the number of units sold in the last 7 days versus the number of units sold in the last 30 days.  
  • One means unit sales are flat.  
  • Greater than one means unit sales comparatively increased.  
  • Less than one means unit sales have comparatively decreased. |
| units_sold_7_long_trend | A comparison of the number of units sold in the last 7 days versus the number of units sold in the last 365 days.  
  • One means unit sales are flat.  
  • Greater than one means unit sales comparatively increased.  
  • Less than one means unit sales have comparatively decreased. |
| units_sold_30_long_trend | A comparison of the number of units sold in the last 30 days versus the number of units sold in the last 365 days.  
  • One means unit sales are flat.  
  • Greater than one means unit sales comparatively increased.  
  • Less than one means unit sales have comparatively decreased. |
| revenue_sold_7_short_trend | A comparison of the product revenue for the last 7 days versus the product revenue for the last 30 days.  
  • One means revenue is flat.  
  • Greater than one means revenue comparatively increased.  
  • Less than one means revenue comparatively decreased. |
Field Name | Description |
---|---|
**revenue_sold_7_long_trend** | A comparison of the product revenue for the last 7 days versus the product revenue for the last 365 days.  
• One means revenue is flat.  
• Greater than one means revenue comparatively increased.  
• Less than one means revenue comparatively decreased. |
**revenue_sold_30_long_trend** | A comparison of the product revenue for the last 30 days versus the product revenue for the last 365 days.  
• One means revenue is flat.  
• Greater than one means revenue comparatively increased.  
• Less than one means revenue comparatively decreased. |

**Related Topics**

Create A Standard Recommendation on page 1419

A recommendation is a combination of criteria and priority settings that are used to create a targeted list of products from your product catalog. A standard recommendation can only be built using product data.

Create A Premium Recommendation on page 1423

A recommendation is a combination of criteria and priority settings that are used to create a targeted list of products from your product catalog. A premium recommendation uses predictive models or filters based on a reference contact or reference products in order to create highly-personalized product recommendations. You can build a standard recommendation using either Recommendations Standard or Premium, but you must have Recommendations Premium to create a premium recommendation.

**Browse Fields**

Browse fields are product fields that are automatically generated and populated for Browse Recovery app users. If you do not use Browse Recovery this help topic does not apply to you.

Browse fields contain statistics about product page views and trends in product views over time.

Use the Product Search on page 1018 page to view these fields for individuals products. Bronto updates these values once per day. Views are calculated using your site's timezone and all page views through the most recent midnight are counted. For example, *page_views_7* represents the number of page views for the given product in the 7 day period through the previous day. Any views after midnight on the current day are included in the next nightly calculation.

For customers who use Recommendations, these fields can be used as criteria and/or priorities when building recommendations and several recommendation templates have been built using these fields. When using these fields for criteria, keep in mind that new products may have a skewed positive or negative result due to brand awareness. To avoid over-promoting these products you might want to use a filter to eliminate newer products from consideration.

See Create A Standard Recommendation on page 1419 or Create A Premium Recommendation on page 1423 for more details.

The available commerce fields are listed in the following table.

Field Name | Description |
---|---|
**page_views_7** | Number of times the product has been viewed in the last 7 days. A zero value means there were no views in the last 7 days. |
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>page_views_30</td>
<td>Number of times the product has been viewed in the last 30 days. A zero value means there were no views in the last 30 days.</td>
</tr>
<tr>
<td>page_views_90</td>
<td>Number of times the product has been viewed in the last 90 days. A zero value means there were no views in the last 90 days.</td>
</tr>
<tr>
<td>page_views_7_short_trend</td>
<td>A comparison of the number of product views in the last 7 days versus the number of page views in the last 30 days.</td>
</tr>
<tr>
<td></td>
<td>• One means unit views are flat.</td>
</tr>
<tr>
<td></td>
<td>• Greater than one means views comparatively increased.</td>
</tr>
<tr>
<td></td>
<td>• Less than one means views have comparatively decreased.</td>
</tr>
<tr>
<td>page_views_7_long_trend</td>
<td>A comparison of the number of product views in the last 7 days versus the number of views in the last 365 days.</td>
</tr>
<tr>
<td></td>
<td>• One means product views are flat.</td>
</tr>
<tr>
<td></td>
<td>• Greater than one means views comparatively increased.</td>
</tr>
<tr>
<td></td>
<td>• Less than one means views have comparatively decreased.</td>
</tr>
<tr>
<td>page_views_30_long_trend</td>
<td>A comparison of the number of product views in the last 30 days versus the number of views in the last 365 days.</td>
</tr>
<tr>
<td></td>
<td>• One means product views are flat.</td>
</tr>
<tr>
<td></td>
<td>• Greater than one means views comparatively increased.</td>
</tr>
<tr>
<td></td>
<td>• Less than one means views have comparatively decreased.</td>
</tr>
</tbody>
</table>

**Related Topics**

- **Create A Standard Recommendation** on page 1419
  A recommendation is a combination of criteria and priority settings that are used to created a targeted list of products from your product catalog. A standard recommendation can only be built using product data.

- **Create A Premium Recommendation** on page 1423
  A recommendation is a combination of criteria and priority settings that are used to created a targeted list of products from your product catalog. A premium recommendation uses predictive models or filters based on a reference contact or reference products in order to create highly-personalized product recommendations. You can build a standard recommendation using either Recommendations Standard or Premium, but you must have Recommendations Premium to create a premium recommendation.

- **Browse Recovery App** on page 1461
  Browse Recovery allows you to capture potentially lost revenue based on the behavior of contacts on your site.

**Product Data Imports**

After your data feed is configured, you will need to import it into Bronto.

For more information about configuring your data feed see **Product Data Feed Set Up** on page 1122.
### Important:
If you use a connector to import product data into Bronto, you cannot manually import product data. Therefore, all of the options related to uploading product data are disabled. You can still view product fields and search for product data.

There are three ways to import product data feeds into Bronto:

- Manually import the feed in Bronto.
- Set up an automatic import from an FTP Server or URL. For more information about how to do this see Configure Product Automatic Import Settings on page 1128.
- Import the feed using an API call. With the API, you can either import an entire feed or import data updates for individual products.

Entire feed imports that use either an API call or the automatic import process can only occur once per day. But you can use Bronto to manually import your product data feed any time an import is not already in progress. You can also use the API to import updated data for existing products at any time.

During import, the data feed is compared to the product data stored in Bronto and any existing data that does not match the new product data feed is changed. All existing products that are not included in the new import are automatically archived. A row that has a missing ID, or doesn’t have the same number of product attributes as there are file headers, is not imported. If this product was previously imported, the existing product data is archived.

#### Note:
When importing a delimited file, all mapped product fields are required. Failure to include a mapped field will result in the product import failing for that specific product. XML file imports do not require this.

Product data in the feed is also validated against the field and file format configuration rules. Any unspecified product attribute is considered empty and any previous value in that attribute is deleted.

You must manually import data for the first time before you can automatically import data or use API calls.

When an import completes, a notification is triggered in the application. If you configured Bronto to email you a notification, you will also receive the notification via email. After you receive a notification you can view the transaction report for more details about the success of the import. For more information about transaction reports see View Product Reports on page 1143.

If you want to watch a video that walks you through how to manually import a product data feed:

- Click here to watch the Import Delimited Product Data Feed File video.
- Click here to watch the Import XML Product Data Feed File video.

### Import a Product Feed Manually

You must use the manual import option the first time you import a product data feed. After that, you can either configure automatic imports or manually import product catalog updates.

The ability to manually import a feed is only available after you have configured your feed formats and mapped your product attributes to Bronto fields. See Configure Your Product Feed Settings on page 1126 and Map Product Fields on page 1130.

Only one manual import can be run at a time. Your product feed file cannot contain more than 3 million products.

#### Attention:
Your import feed should contain all products that will be referenced in your order data import. After your initial import, you can begin importing only your active products. The initial import feed should contain any products that have been active in the past 18 months. Importing more products and orders will increasing the accuracy of Bronto’s predictive models and lead to more personalized recommendations.

To manually import a feed:

1. Go to Tables > Products > Overview.
2. Click Import Products.
3. To upload a file from your computer:
   a) Click Upload a File.
   b) Select your product data feed and click Open.
4. To upload a file from your FTP or HTTP location, click Pull file from configured location.
For FTP and FTPS imports, Bronto checks for the existence of a file that matches the file name pattern. If one is found, the file is imported only when the data feed's timestamp is later than the timestamp of the last successful file import.

Note: The file timestamp is based on the FTP site’s time zone. If that time zone is different from the your site's time zone, the comparison might incorrectly believe the file is newer or older than the last successful import and process it accordingly. To avoid this issue, make sure the FTP time zone and your site's time zone is set to the same value.

For HTTP and HTTPS imports, Bronto checks for the last modified date in the response header. The import is completed only if that datetime is later than the datetime of the last successful import. If no last modified date appears in the response header, Bronto assumes the file is the most current and completes the import.

5. Click Import.
   The Confirm Import window is displayed.

6. Click Continue.
   The import process begins. Stay on this page until the file upload is complete.

   Warning: If you click away from this page, or click any other option on this page, before the file upload completes your import will be terminated.

When file upload completes, you are redirected to the Product Import History page, which contains your product reports. You will also receive a notification when an import is complete. For more information about product reports see View Product Reports on page 1143.

Set Up Product Data Feed Imports Using the API
You can use Bronto's API to complete one successful full product feed import per every 24 hours. A successful import means the file was properly received and processed, although specific product records may have contained errors. Your product feed file cannot contain more than 3 million products.

Refer to the API documentation for specific instructions on how to use the API to import product data.

Bronto also provides API calls you can use to import updates to existing product data. These calls are not subject to the once-per-24-hour import limit and cannot be used to import new products into Bronto. When submitting JSON to update existing product data, all mapped product fields are required. Failure to include a mapped field will result in the product import failing for that product. If an API product update is requested while you have a feed import in progress, the request fails and you will need to resubmit the request after the feed import completes.

It's important to note that imports are progressive. During import, the data feed is compared to the product data stored in Bronto and any existing data that does not match the new product data feed is changed. This means that when you do a full file import you cannot upload partial files or the previously imported product data that is not included in the new file will be archived. The only exception to this is product data that has been updated using the individual product update API call. For products that have been updated individually, the date of the last product update is compared to the date the product data feed file was last updated and whichever date is the most recent will be honored. This means a full file import would not overwrite the product data imported with the API call if the date and time of the API call occurred after the product data feed was last saved.

If you encounter an issue with the data in the import that needs to be corrected before a full 24 hours has passed, you can use the manual import process to import a new data feed with your corrections. See Import a Product Feed Manually on page 1141.

Product Import History
The Product Import History page includes a list of all the imports that have run, key metrics, and links to the product data feed file and transaction logs.
If a product report indicates that an import has failed, then nothing in the file was processed. Failed imports are typically caused by the file having a different delimiter than indicated on the configuration page or by the file missing a product attribute value that was mapped to a field. An import may also fail due to incorrectly configured FTP or HTTP paths or bad FTP credentials.

If a product report indicates that the import was successful, then some - but not necessarily all - of the data was imported successfully. You can view the transaction log for the import to see a more detailed view of the status of individual products in the import. If no errors were found during the import, the log only contain the start and end date and times. If there were issues with an import, the information in the transaction log can be used to troubleshoot and fix errors and warnings.

Import files and transaction logs are deleted after 90 days and will not be available on Bronto after that time.

**View Product Reports**

Product reports can be viewed in the product reports table on the Product Import History page.

To view product reports:

1. Go to Tables > Products > Overview.
2. Click Product Import History.
   An overview of your transaction history and the most recent transaction reports are displayed.
3. To view a detailed transaction log for an import, click the Transaction Log link.
   When you click the link, the transaction log text file is downloaded to your computer. You can open the file to see any warnings or errors that may have occurred during import.
4. To view the data feed that was imported, click the Feed File link.
   When you click the link, the product data feed text file is downloaded to your computer.

**Product Import History Snapshot**

The Product Import History Snapshot provides a quick view of metrics related to your imports.

The following describes the fields in the Product Import History Snapshot:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Imports Completed</td>
<td>Total number of attempted imports. This includes both successful and failed imports.</td>
</tr>
<tr>
<td>Avg New</td>
<td>Average number of new products that have been imported per feed import. Failed imports are included in this average.</td>
</tr>
<tr>
<td>Avg Updated</td>
<td>Average number of products that have been updated per feed import. Failed imports are included in this average.</td>
</tr>
<tr>
<td>Avg Archived</td>
<td>Average number of products that have been archived per feed import. Failed imports are included in this average.</td>
</tr>
</tbody>
</table>
### Product Import Report Table Fields

The following describes the fields in the import reports table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg Failed</td>
<td>Average number of products that have failed to import per feed import. Failed imports are included in this average.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Indicates if the import was successful.</td>
</tr>
<tr>
<td></td>
<td>• Completed: The import was successful.</td>
</tr>
<tr>
<td></td>
<td>• Failed: The import was not successful and no fields were imported. A failed import is often caused by a configuration error.</td>
</tr>
<tr>
<td>Started</td>
<td>Date and time the data feed file import kicked off.</td>
</tr>
<tr>
<td>Ended</td>
<td>Date and time the data feed import completed.</td>
</tr>
<tr>
<td>Duration</td>
<td>Length of time; in hours, minutes, seconds; that it took to complete the file import process.</td>
</tr>
<tr>
<td>New Products</td>
<td>Number of new products that were imported.</td>
</tr>
<tr>
<td>Updated Products</td>
<td>Number of previously imported products that were effected by the import.</td>
</tr>
<tr>
<td>Archived Products</td>
<td>Number of previously imported products that were archived because they were not in the imported data feed.</td>
</tr>
<tr>
<td>Failed Products</td>
<td>Number of products in the feed that failed to import.</td>
</tr>
<tr>
<td>Transaction Log</td>
<td>Link to download the transaction log report. When you click the link, a text file downloads to your computer. If you see</td>
</tr>
<tr>
<td></td>
<td>• N/A: the import has not finished processing.</td>
</tr>
<tr>
<td></td>
<td>• Deleted: the log has been deleted.</td>
</tr>
<tr>
<td>Feed File</td>
<td>Link to the product data feed that was imported. When you click the link, a text file downloads to your computer. If you see</td>
</tr>
<tr>
<td></td>
<td>• N/A: the import has not finished processing or no feed was successfully imported.</td>
</tr>
<tr>
<td></td>
<td>• Deleted: the product data feed file has been deleted.</td>
</tr>
</tbody>
</table>

### View The Product Import Transaction Log

The transaction log is a detailed import report for the individual fields in your product data feed. In the log you will see any warnings or errors that occurred during import, with detailed information about which item in the feed caused the issue.
Transaction logs reports can be accessed from the product reports table on the Product Import History page.

To view a transaction log:

1. Go to Tables > Products > Overview.
2. Click Product Import History.
   An overview of your transaction history and the most recent transaction reports are displayed.
3. Click the Transaction Log link.
   The transaction log text file is downloaded to your computer.
4. Open the transaction log text file.
   In the file, you can see any warnings or errors that may have occurred during import. If the file only contains the start and end date and times, then the import completed without any issues.

Order Data Import Or Collection

While you can manually import order data into Bronto using either Data Loader or Bronto's REST API, we recommend setting up an integration that will automatically pass the order data from your system into Bronto.

Order Service is the back-end service Bronto uses to automatically pass order data from your site into your Bronto account. With Order Service, data is collected and passed via a real-time integration between your site and Bronto. Some Order Service implementations can also be used to pass cart data.

Note: You cannot use either New Reports or Recommendations Premium if you do not use Order Service to supply Bronto with order data.

There are three ways you can set up your account to use Order Service.

Connector Implementation

If you use Shopify, NetSuite, Magento, or Demandware, you can set up the relevant Bronto connector to pass order data. See the link for your integration for information on how to do this.

JSON Orders Implementation

If you want to capture cart and order data but do not use any of the partners listed above, you can use the JSON Orders implementation to pass order and cart data. This requires adding Bronto commerce embed code to your site and using the sections on the Commerce page to map cart phases (stages in the checkout process) and Bronto cart selectors to data (code) on your site. This lets Bronto knows what order data to capture and how to interpret it.

To do this, you will need to understand how the orders-related code on your site is constructed and how to work with either JQuery selectors or JSON objects. If you want to do this and you aren't comfortable with coding, we recommend working with Bronto Professional Services or from your site's development team.

JavaScript Snippet Implementation

You can Use A JavaScript Snippet To Pass Order Data on page 1151. This method requires you to add Bronto commerce embed code and a customized JavaScript object (that you write) to the code on your site. Then, you can configure Bronto to capture order data from these two code snippets. This object cannot be used to capture cart data, so this is not the preferred method for anyone who wants to use Cart Recovery.

Migrate From Legacy Conversion Tracking

Order Service was added to Bronto in 2015. Before then, Bronto offered a different method for passing order data - Legacy Conversion Tracking. (This has also been called Advanced Conversions and JavaScript Conversion Tracking.) If you're an existing Bronto customer who set up Legacy Conversion Tracking, you will need to Migrate From Legacy Conversion Tracking on page 1152 to Order Service in order to use newer Bronto features. Part of this process requires Bronto to migrate your order data from the old orders system to the new system, so you must follow the migration path instead of setting up Order Service using one of the methods listed above.
Use A JSON Object To Pass Order Data

You can construct a JSON object and add it to your site in order to use Order Service to pass cart and order data to Bronto.

In order to do this, you will need to work with the code for your site. This includes adding a snippet of code, provided by Bronto, to your site and finding jQuery selectors and JSON objects in your site code in order to map them to the appropriate Bronto values. To set up Order Service using a JSON object:

1. **Add the Tag Manager code** to each page on your commerce site. Once you add the code to your site, Bronto can track and receive data from your site. However, Bronto will not know how to recognize or manage different items on your site until you complete the rest of the commerce configuration.

2. **Construct a JSON Object** and add it to every page on your site that captures cart or order data.

3. **Configure your Order Settings.** The order settings tell Bronto how to manage the data as it comes in from your site.

4. **Set up your storefront, which includes:**
   a. **Mapping Bronto cart phases to jQuery selectors** on your site. Cart phases represent different stages in the checkout process. Mapping the cart phases lets Bronto recognize when different workflows should be triggered based on a change to a cart or order's status.
   b. **Setting up your cart view.** The critical step in setting up your cart view is mapping Bronto cart selectors to objects on your site. Cart selectors are used to identify objects on your site that represent specific shopping cart items. Once mapped, Bronto is able to collect the detailed information about a cart or order, such as a shopping cart's subtotal, the order ID, or a product name. There are two ways you can map cart selectors:
      - **Map Cart Selectors To Your Site Using jQuery Selectors** on page 1149
      - **Map Cart Selectors To Your Site Using JSON Objects** on page 1150 If all of the items you want to collect data on are stored in the same JSON object, you can use the JSON object to map items on your site to Bronto cart selectors. If not, use the jQuery selector method.
   c. **Defining Email Capture Points.** This allows Bronto to capture email addresses entered by a shopper on a commerce website in order to send Cart Is Abandoned emails to that email address.

After you have completed all of these steps, Bronto can identify and capture cart and order data for contacts that have placed items in shopping carts, even when they have not completed their orders. And you can use the cart and order data captured by Bronto to

- Add cart and order data into messages. See Cart and Order Tags on page 174.
- Trigger personalized messages via workflows. See Use The Cart Is Abandoned Trigger Node In Workflows on page 364, Use The Order Is Added Trigger Node In Workflows on page 365, and Use The Order Is Shipped Trigger Node In Workflows on page 365.
- Create segments. See Commerce Segment Criteria on page 459.

**Build An Order Service JSON Object**

This topic provides an example JSON object that you can use as a reference while you construct yours.

When you implement Order Service using the JSON Object implementation, you will need to do the following to build the JSON Object:

- Create a JSON Object that represents the commerce code on your site.
- Add this object to your site so that it appears on every page you have a cart.
- Use the settings on the commerce page to map your JSON object fields so Bronto can collect data appropriately.

The following is a code example you can use to build your object. As you construct your object, remove any fields in the example you do not want to collect and modify the example values (ORDER_COMPLETE, USD, etc.) to values on your site.

Some things to keep in mind as you construct your object:

- The JSON Object can contain a “cartPhase” element representing current stage of checkout. Phases include: CUSTOMER_LOGIN, BILLING, SHIPPING_INFO, SHIPPING_METHOD, PAYMENT, ORDER_REVIEW, ORDER_COMPLETE. The ORDER_COMPLETE cart phase is required.
• If mapped, `taxAmount` should have either 2 or 4 decimals places.
• `grandTotal` and `orderId` are required for `ORDER_COMPLETE`.
• Only provide `emailAddress` if you are providing a corresponding value or data can be incorrectly attributed to contacts.
• Make sure you pass the full URL for `imageUrl`.

```javascript
<brontoCart ={
    "cartPhase": "ORDER_COMPLETE",
    "currency": "USD",
    "subtotal": 35.98,
    "discountAmount": 0,
    "taxAmount": 0,
    "grandTotal": 35.98,
    "orderId": "123ABC",
    "emailAddress": "example@example.com",
    "cartUrl": "http://brontogear.com/",
    "shippingAmount": 7.99,
    "shippingDate": "05 - 18 - 2018",
    "shippingDetails": "FedEx",
    "shippingTrackingUrl": "http://fedex.com/tracking/NIeX3KYLcPhgRzKy",
    "lineItems": [{
        "sku": "576879",
        "name": "Shirt",
        "description": "A super great description of the product",
        "category": "Shirts > T-Shirts > Blue",
        "other": "This can be any string value you like",
        "unitPrice": 11.99,
        "salePrice": 11.99,
        "quantity": 2,
        "totalPrice": 23.98,
        "imageUrl": "http://brontogear.com/a/p/shirt.jpeg",
        "productUrl": "http://brontogear.com/index.php/shirt.html"
    },
    {
        "sku": "1112296",
        "name": "Fleece Jacket",
        "description": "A well appointed Fleece jacket",
        "category": "Jackets > Winter > Fleece",
        "other": "This can be any string value you like",
        "unitPrice": 65.99,
        "salePrice": 55.50,
        "quantity": 1,
        "totalPrice": 55.50,
        "imageUrl": "http://brontogear.com/a/p/fleece.jpeg",
        "productUrl": "http://brontogear.com/index.php/fleece.html"
    }]
}<script type="text/javascript">
</script>

After you construct your object, add it to your site. The JSON Object should:
• Be located in the Footer if presented in DOM.
• Load first, followed by the Bronto Embed Code.
• Appear on all pages once the first item is added to cart.

**Edit Your Storefront**
Storefront Settings determine what objects on your site Bronto uses to receive data.
**Important:** This topic does not apply to you if you are not using the Order Service.

There are three types of storefront settings:

- **Cart Phases:** how Bronto identifies the different checkout phases from your site.
- **Cart Views:** how Bronto captures data from your customers' carts.
- **Email Capture Points:** how Bronto associates a customer's email address with shopping cart activity.

You can also change the name of your storefront.

To edit the name of your storefront:
1. Go to **Home > Settings > Commerce**.
2. Click on the name of the storefront. The default name is **My Storefront**.
3. Add a name for the storefront in the **Name** text box.
4. Click **Save Changes**.

**Set Up Cart Phases For Shopping Cart Abandonment**
You can set up cart phases to represent the different stages of the checkout process on your site in order to more granularly track order data.

**Important:** This topic does not apply to you if you are not using the Order Service.

Cart phases represent different stages in the checkout process. For example, you might have one page (or section of a page) that refers specifically to billing information, another for payment, and so on. In order to identify where in the checkout process shopping cart data was captured, Bronto needs to be able to recognize your site's different cart phases.

To do this, you can use jQuery selectors and/or path regular expressions to map the page, or the part of the page, that represents the each of these phases to different Bronto pre-defined phases. The jQuery selectors already exist in the code for your site. To map them, you need to locate the jQuery selector in the site code for the relevant cart phase, copy it, and enter it into Bronto.

To map cart phases:
1. Go to **Home > Settings > Commerce**.
2. Click the pencil icon in the row associated with a **Cart Phase**.
3. Enter the jQuery selector for this cart phase in the **jQuery Selector** box.
   - The correct jQuery selector can be found in the code for the page related to this cart phase. You do not need to enter a jQuery selector if you only want to identify the cart phase using a regular expression.
   - **Tip:** For more information on using jQuery selectors, see the [jQuery selector documentation](#).
4. Add a path regular expression in the **Url Pattern** box.
   - You do not need to enter a regular expression if you only want to identify the cart phase using a jQuery selector.
   - **Tip:** A regular expression is a special text string for describing a search pattern, so your regular expression should identify a search pattern for finding the URL path related to the cart phase.
5. Click **Save Changes**.
6. Repeat steps 2 - 6 for every cart phase you want to use to capture data.
   - Make sure to map the **ORDER_COMPLETE** cart phase. Bronto uses this phase in revenue calculations.

**Add Cart Views For Shopping Cart Abandonment**
You need to add cart views to manage cart selectors for your site.

**Important:** This topic does not apply to you if you are not using the Order Service.

Cart Views represent different versions of the cart on a commerce site. For example, the site may have a full cart display on certain pages and only a partial cart on other pages. Cart views contain cart selectors, which are user
defined jQuery selectors used to select elements which contain specific shopping cart data. For more information about cart selectors, see Map Cart Selectors To Your Site With JQuery Selectors.

Bronto only supports one active cart view. Therefore, you should use the cart view with the most detail.

To add a Cart View:

1. Go to Home > Settings > Commerce.
2. Click Add Cart View.
3. Add a name for the Cart View in the Name text box.
4. Click Save Changes.

Map Cart Selectors To Your Site Using JQuery Selectors
You can use JQuery selectors to map items on your site to Bronto cart selectors in order to pass customer data to Bronto.

Important: This topic does not apply to you if you are not using the Order Service.

Cart selectors are used to identify objects on your site that represent specific shopping cart items you would like to use to capture customer data. There are two ways to identify and map items on your site to Bronto cart selectors:

- JQuery Selectors: You can use JQuery selectors to identify each relevant item in your site's code and once you have identified the item you can map it to its corresponding cart selector. To do this, follow the instructions below.
- JSON Objects: When all of the items you want to collect data on are stored in the same JSON object, you can use the JSON object to map items on your site to Bronto cart selectors. For more information see Map Cart Selectors To Your Site Using JSON Objects on page 1150.

Before your cart selector mappings will work you need to embed the tag manager code on your site. You will also need to use JQuery selectors to identify the code on your site that is relevant to each cart selector.

Tip: For more information on using jQuery selectors, see the jQuery selector documentation.

To map a cart selector using JQuery:

1. Go to Home > Settings > Commerce.
2. Click on the name of a Cart View.
3. Click the pencil icon associated with the cart selector you want to map.

Note: A cart selector represents a specific piece of shopping cart data you can capture (e.g. Shopping Cart Subtotal, Product Name, Product SKU, etc.)

4. Enter the item from your site into the jQuery Selector text box.

This is used to select the object that contains the data for a specific cart selector and it can be found in your site's code.

When you map a selector, make sure the jQuery selector you choose matches the description for the selector in Bronto. For example, when you map \texttt{lineItemTotalPrice} it needs to be mapped to the jQuery selector on your site that contains the total price for a line item.

5. Optional: Add an attribute in the Attribute text box.
6. Click **Save Changes**.
7. Repeat steps 3 - 6 for each cart selector you want to use to capture data.
   
   Not every selector needs to be mapped, but data will only be passed back to Bronto for the selectors that are.
8. Optional: If your contacts can use third-party sites to buy products, map the **cartLinkSelector** to every link that takes you from your domain to the third-party checkout domain.
   
   Mapping the selector appends Bronto cookie information to these links. This allows Bronto to transfer cookies from your site to other domains and with these cookies Bronto can continue to collect order data if a contact shops on your site but uses a third-party site to check out.

**Map Cart Selectors To Your Site Using JSON Objects**

If all of the items you want to collect data on are stored in the same JSON object, you can use the JSON object to map items on your site to Bronto cart selectors in order to pass customer data to Bronto.

⚠️ **Important:** This topic does not apply to you if you are not using the Order Service.

Cart selectors are used to identify objects on your site that represent specific shopping cart items you would like to use to capture customer data. There are two ways to identify and map items on your site to Bronto cart selectors:

- JQuery Selectors: You can use JQuery selectors to identify each relevant item in your site's code and once you have identified the item you can map it to its corresponding cart selector. For more information see Map Cart Selectors To Your Site Using jQuery Selectors on page 1149.
- JSON Objects: When all of the items you want to collect data on are stored in the same JSON object, you can use the JSON object to map items on your site to Bronto cart selectors. To do this, follow the instructions below.

Before your cart selector mappings will work you need to embed the [tag manager code on your site](https://example.com).

To map cart selectors using a JSON object:

1. Go to **Home > Settings > Commerce**.
2. Click on the name of a Cart View.
3. Click the pencil icon associated with the **shadowDiv1** cart selector.
   
   a) Enter the JSON object from your site into the **jQuery Selector** box.
      
      Make sure the JSON object you use contains the fields for all of the items you want to map to other cart selectors.
   b) Click **Save Changes**.

![Edit Cart Selector: shadowDiv1](https://example.com)

4. Click the pencil icon associated with the cart selector you want to map.
   
   a) Enter div in the **jQuery Selector**: box.
   b) Enter the corresponding JSON object field in the **Attribute**: box.
      
      Make sure the JSON field you choose matches the description for the selector in Bronto
   c) Click **Save Changes**.

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5. Repeat step 4 until all of the relevant cart selectors are mapped.
6. Optional: If your contacts can use third-party sites to buy products, map the cartLinkSelector to every link that takes you from your domain to the third-party checkout domain.

Mapping the selector appends Bronto cookie information to these links. This allows Bronto to transfer cookies from your site to other domains and with these cookies Bronto can continue to collect order data if a contact shops on your site but uses a third-party site to check out.

**Add Email Capture Points For Shopping Cart Abandonment**

You need to set up an email capture point in order to associate commerce data with a contact.

**Important:** This topic does not apply to you if you are not using the Order Service.

Shopping Cart Abandonment depends on the ability to associate a shopping cart with an email address, and thus a Bronto contact. Without this information, Bronto is not able to trigger abandonment emails when carts transition to the abandoned status.

To capture email addresses entered by a shopper on a commerce website, an Email Capture Point must be defined for each section of the commerce website that allows users to enter an email address (e.g. sign-in forms, sing-up forms, newsletter subscriptions, or guest checkout forms).

**Tip:** For more information on using jQuery selectors, see the jQuery selector documentation.

**Tip:** For more information on triggering a workflow when a shopping cart is abandoned, see Use The Cart Is Abandoned Trigger Node In Workflows on page 364.

**Related Topics**

Use The Cart Is Abandoned Trigger Node In Workflows on page 364

The Cart Is Abandoned trigger node begins a workflow when a shopping cart is abandoned.

**Use A JavaScript Snippet To Pass Order Data**

You can construct a JavaScript snippet that can be used to collect order data from your site using Bronto Order Service.

Order Service is the back-end service Bronto uses to automatically pass order data from your site into your Bronto account. To collect order data using this method, you will need to construct a JavaScript snippet, embed code on your site, and configure order settings in Bronto.

The Order Capture Script on the Commerce Settings page is a JavaScript snippet example. You can take this example, replace the placeholders in the code with data from your site, and then add your customized snippet to any page where order data is captured.

**Note:** If you already use Legacy Conversion Tracking you will need to work with Bronto to fully move from Legacy Conversion Tracking to this process or a JSON implementation. See Migrate From Legacy Conversion Tracking on page 1152 for more information.

There are a few important things to understand:
1. If you use a JSON Object integration to pass order data from your site to Bronto, you do not need to use this script. We highly recommend using a JSON integration.

2. JavaScript has browser and configuration dependencies; we cannot guarantee the accuracy of order data when it is sent by this method. Typically 90% of orders will be captured. If you're concerned about orders being "lost", we suggest using Bronto's REST API or Data Loader to pass the order data to Bronto in addition to this process.

3. In order for Bronto to be able to collect data with this script you must also have embedded the tag manager code on your site.

4. You cannot simply copy and paste this script onto your site. The script must be modified so that it passes in order data from your site. The values in blue and orange are fake, example data and must be replaced with data from your site.

5. The only required values are emailAddress and grandTotal. If you have included line item data then quantity and totalPrice are also required. You should delete any values you do not want to pass to Bronto.

6. This method can only be used to collect order data; it cannot collect cart data.

To implement:

1. Go to Home > Settings > Commerce.

2. Embed the tag manager code on your site:
   a) In the Tag Manager section on the Commerce page, copy all of the code in the black box.
   b) Paste the copied code into the code for your site.

   The code should be added to each page on your site. We also recommend embedding the code in the site's footer code so that the embed code runs after everything else on the page.

3. Copy the Order Capture Script and modify it to capture the appropriate data from your site.

   This includes removing any order fields you do not want to collect and send to Bronto and updating the JavaScript snippet to properly collect the order data you do want to pass from your site.

4. Add your modified JavaScript snippet to any page on your site where order data is captured.

   This script currently does not capture cart data, so you only need to add it to order pages.

5. In Bronto, configure your order settings.

6. Test that the order data is being captured correctly:
   a) After you have completed the previous steps, place a test order on your site.
   b) In Bronto, navigate to Tables > Orders.
   c) Click Show Advanced Options.
   d) Use the Order Date fields to search for orders from the current day.
   e) Find your test order in the list and compare the order details in Bronto to the order details on your site.

   We recommend exporting your order data from both Bronto and your commerce platform and running a comparison. Roughly 90% of the data from your site should be represented in your Bronto export file.
   f) If the order is missing in Bronto or the order details do not match, make sure your JavaScript snippet is constructed properly and both the snippet and the embed code and included in your site code appropriately. Make any necessary adjustments and test again.

Migrate From Legacy Conversion Tracking

An account must use Order Service in order to use several of Bronto's new features. If your account uses Legacy Conversion Tracking, then it does not use Order Service and will need to be migrated.

Use this guide to tell if your account has Order Service turned on. If it Order Service is not on in your account, you have two migration options:

1. Migrate to a JSON Object implementation. If you use JSON objects on your site, we highly recommend this type of Order Service implementation as it also supports collecting cart data which will allow you to implement Cart Recovery.

   Note: This migration path requires a Professional Services engagement; please contact your account manager for more details.
2. Migrate using Bronto's JavaScript Snippet implementation. This process involves building a JavaScript snippet and adding it to the code on your site in order to allow Bronto to collect order data. Once you're sure order data is being collected, Bronto support will work with you to migrate your old order data to order service.

You will complete some parts of orders migration yourself and some steps will be performed by customer support. We'll walk you through the full steps below.

Note: This process involves significant JavaScript changes as well as a possible migration from Bronto's SOAP orders API to the Orders REST API. We recommend you're comfortable with JavaScript before starting this migration. If you use Data Loader you will also have to update your Data Loader imports after customer support starts the orders migration process.

To migrate using the JavaScript Snippet conversion process:

1. Go to Home > Settings > Commerce.
2. Embed the tag manager code on your site by placing it under your existing embed code:
   a) Locate your existing embed code.
      It should look similar to
      ```html
      <script type="text/javascript">
      </script>
      <script type="text/javascript">
      var bta = new __bta('somevalue');
      bta.setHost("app.bronto.com");
      </script>
      
      b) In the Tag Manager section on the Commerce page, copy all of the code in the black box.
   c) Paste the copied code below your existing embed code.

      It's very important that you do not replace your existing embed code. Using both methods to collect order data will ensure no order data is lost until your account is set up properly with Order Service. Make sure each code snippet is enclosed in its own script tags.

3. Copy the Order Capture Script from the Home > Settings > Commerce page and modify it to capture the appropriate data from your site.

   Note: You cannot simply copy and paste this script onto your site. The script must be modified so that it is passes in order data from your site.

   This includes removing any order fields you do not want to collect and send to Bronto and updating the JavaScript snippet to properly collect the order data you do want to pass from your site. emailAddress and grandTotal are the only required fields, unless you are also passing line item data in which case you must also include quantity and totalPrice.

4. Add your modified JavaScript snippet to your site below the existing code your site uses to capture order data.

   The existing order capture code snippet should have `bta.addOrder` in it. It's very important that you do not replace your existing code. Using both methods to collect order data will ensure no order data is lost until your account is set up properly with Order Service. Make sure each code snippet is enclosed in its own script tags.

5. In Bronto, configure your order settings.

6. Test that the order data is being captured correctly:
   a) After you have completed the previous steps, place a test order on your site.
   b) In Bronto, navigate to Tables > Orders.
   c) Click Show Advanced Options.
   d) Use the Order Date fields to search for orders from the current day.
   e) Find your test order in the list and compare the order details in Bronto to the order details on your site.
We recommend exporting your order data from both Bronto and your commerce platform and running a comparison. Roughly 90% of the data from your site should be represented in your Bronto export file. If the data does not match, check the formatting of the JavaScript snippet.

f) If the order is missing in Bronto or the order details do not match, make sure your JavaScript snippet is constructed properly and both the snippet and the embed code and included in your site code appropriately. Make any necessary adjustments and test again.

7. If you currently use Bronto's SOAP API to import order data, update your API process to use Bronto's REST API.

8. When you're sure order data is being collected properly, contact customer support to request an order data migration.

   This lets them know you are ready to migrate your old order data to order service.

9. If you use Data Loader to import order data, update your Data Loader imports after Bronto customer support has started the order data migration process.

   You will receive a prompt in Data Loader when it can be updated.

   We recommend using either Bronto's API or Data Loader as a backup method of importing order data. JavaScript has browser and configuration dependencies so we cannot guarantee the accuracy of order data when it is sent by this method alone.

10. When support contacts you to verify the migration process is complete, use the Tables > Orders page to verify your order data looks accurate.

11. Finally, remove the old embed and conversion tracking code.

Related Topics

Configure Order Settings

Order settings define how order data is stored in Bronto.

**Important:** This topic does not apply to you if you are not using the Order Service.

To configure order settings:

1. Go to Home > Settings
2. Click Commerce.
3. In the Order Settings section, select:
   - **Processed** if you want Bronto to treat orders as if they are complete. Processed orders cannot be modified.
   - **Pending** if you want to be able to append additional information to orders.
4. Select a default currency for your site from the Default currency for carts and orders captured via JavaScript list.
5. Select a cookie expiration time length from the Conversion Tracking Cookie Expires After list.
6. If you would like to allow Bronto to create first-party cookies, select the Add tracking URL parameters used to create and use first-party cookies box.

   When you enable this, two additional parameters are added to URLs used in Bronto-sent email. These parameters allow the platform to create first-party cookies. Provided you have Click Through Link Tracking enabled, when a contact clicks a link contained in an email you send them via Bronto, we create a tracking cookie (most commonly used for tracking conversions). If the domain the URL points to is different from your domain, then the cookie created will be a third-party cookie. Third-party cookies may be blocked, depending on your contacts' browser settings, resulting in a loss of tracking data. In contrast, first-party cookies are much less likely to be blocked, thus ensuring that conversions are tracked. For more information on deciding when to use the Tracking URL Parameters feature, see When To Use The Tracking URL Parameters on page 1353.
7. If you have a two-part, top-level domain name and want to enable cart and order cookie tracking:

   A two-part, top-level domain looks similar to example.co.uk or example.com.au.
a) Select the **Enable Cart and Order cookie tracking when you have a two-part top level domain name** box.
b) Enter your domain name in the **Two-part top level domain name** box.

Only enter the domain name; do not include `http` or `www`. For example, Bronto Australia would only enter `bronto.com.au`.
c) Click **Save**.

**Related Topics**

Add Tracking URL Parameters Used To Create First-Party Cookies on page 1354

When you enable the **Tracking URL Parameters** feature, two additional URL parameters are added to URLs used in emails you send via Bronto.

**Embed Tag Manager Code On Your Site**

The Tag Manager custom embed code allows you to track cart and order activity on your site.

**Important:** This topic does not apply to you if you are not using the Order Service.

The Tag Manager custom embed code is a snippet of code you add to your site. This allows you to track cart data and to pass this data back to Bronto.

In order to pass data back to Bronto using the embed code, you must Add Cart Views For Shopping Cart Abandonment on page 1148 and Map Cart Selectors To Your Site With JQuery Selectors. Also, you need to Set Up Cart Phases For Shopping Cart Abandonment on page 1148 if you want to capture different cart phases.

Because the snippet is necessary to collect order data, transactions completed on a third-party payment system cannot be passed directly to Bronto. To capture this data, implement a redirect from the third-party payment system that sends contacts to an order confirmation page on your site. If this page contains the properly mapped order data and the code snippet then Bronto can collect and report on these transactions.

To use the embed code:

1. Go to **Home > Settings > Commerce**.
2. In the Tag Manager section, copy all of the code in the black box.
   
   We recommend you do not edit the code.
3. Paste the copied code into the code for your site.
   
   The code should be added to each page on your site. We also recommend embedding the code in the site's footer code so that the embed code runs after everything else on the page.

**Add or Update Order Data Using Data Loader**

You can use Data Loader to add order data to Bronto or update order data that is already in Bronto.

You can use Data Loaders Add or Update Order option to add orders, update orders, or do both at once. Adding orders using Data Loader allows you to directly import order data without needing to configure commerce settings in the platform. Once the Data Loader import is configured, order data is added or updated every time a file matching the import settings is found on the FTP server when the import is run. You can use a delimiter to offset each line item in your file and specify which delimiter was used in Data Loader.

When you import a file, its contents are compared to existing data in Bronto. If a new record matches an existing record, Bronto will overwrite the existing record. This means if you import an update to a record that includes blank/null fields then the data stored in Bronto for the fields will be blank and/or null after the import.

Once the import has run, you can go to **Tables > Orders** to view your orders or changes to your orders. For more information see Orders Page on page 1022.

To add and/or update order data:

1. Go to **Tables > Data Loader**.
2. Click **Create Import**.
3. Enter the relevant information in the Create Import Job window.
a) Enter a name for the import in the Name box.
b) Enter a description for the import in the Description box.
   The description is a good way to distinguish between similar imports.
c) Select Add or Update Orders from the Type list.
d) Click Create Import Job.

4. Click Upload Sample File To Begin Mapping to map the categories in your file to fields in Bronto.

   This lets Bronto know how to appropriately manage your order data as it is imported.

5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.

   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   • Pipes |
   • Commas ,
   • Semicolons ;
   • Tabs

6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the Upload Sample File window, select Upload a file.
   b) Select your file from the Files list.
   c) Click Upload Sample File.

   If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.

7. If you have transferred a file to the server that you want to map data for:
   a) In the Upload Sample File window, select Select one of the files in your account.
   b) Click Choose File, select your file in the finder window, then click Open.
   c) Click Upload Sample File.

   If the file upload is successful, the mapping page will be displayed.

8. Select the Bronto order field from the Map to list that matches the data shown for the column.

   Mapping helps the platform understand how to manage data as it is imported. For example, in the image below you would select Email Address for Column #1 and Order ID for Column #2. This way, when your email addresses are imported they are formatted like an email address, etc.

   ![Example of a mapping page]
The available Bronto order fields are set; you cannot create new order fields. For more information about available order fields see Order Fields / Order Details on page 1025.

9. On the Configuration tab in the General area, configure the general settings for your import:
   a) Select Yes or No in the Skip First Row Header list.
   b) Select 30 days or 3 days from the Cleanup Schedule list.
      This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the Filename Matching Scheme list
      • Ends with will match files based on the extension specified for the Filename Matching Pattern. Only use Ends with when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, Custom Glob is the best choice.
      • Starts with will match files based on the characters specified for the Filename Matching Pattern starting with the first character. For example, if you have contact for the Filename Matching Pattern then all files on the FTP server that start with the word contact will attempt to be imported.
      • Custom Glob will match files based on the characters and the extension specified for the Filename Matching Pattern. This allows you to use wildcards in order to build more complex import queries.
   d) Enter a full or partial filename in the Filename Matching Pattern box.
      This is used in conjunction with the Filename Matching Scheme to recognize what files on the FTP server should be imported using this import job. If you use the Custom Glob option for Filename Matching Scheme you can use wildcards. Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.
   e) If you want to receive an email notification when your imports complete, enter an email address in the Confirmation Email box.
      The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In the Expected Data Format area, configure how you want the data in your file to be managed as it is imported:
    a) Select a delimiter from the Delimiter list.
    b) If you plan to import date-based data, click the calendar icon under Date Format and fill in the options in the Date Format Builder window.
       You must map a date-based field before you can configure Date Format. In the Date Format Builder, select a date from the Example Date & Time list, click Go, then click on each number in the date to select whether it is a Day, Month, or Year, and then click Done.
    c) Add the types of field data you want to be ignored during import to the Do Not Update Choices box.
       The options you can add here are null, blank, and 0. When you include these options in the Do Not Update Choices box, any existing data for these fields will not be overwritten. If you do not include one of these options here, then any field data previously in Bronto will be overwritten/erased.
    d) Select a default shipping status to apply to orders during the import from the Default Shipping Status list.
       This is only applied to orders where the shipping status is not provided. The default is Not Shipped, but you can change this to Shipped.
    e) Select an order status to apply to orders during the import from the Default Order Status list.
       This is only applied to orders where the order status is not provided. Pending orders are orders that have not been completed and Processed orders have been completed.
    f) If you want workflows that are triggered by the Order Is Added or Order Is Shipped trigger nodes to recognize and trigger on changes to order and shipping statuses made by the import, set Trigger Workflows on Status Update to Yes.
When set to No, imported orders with a change to either the shipping status or the order status will not trigger these workflows even if the status change typically would.

g) Select a currency type from the Default Currency list.

The currency should match the currency you have set for your Bronto account.

11. In the Bronto Settings area, enter the list name in the Add Contacts to Specified Lists box if you want to add contacts to a list as they are imported.

12. When you have finished import configuration, click Save & Close.

   A window that asks you to confirm that you understand and have correctly configured whether your orders should be imported as pending or processed.
   a) Select the I Agree box.
   b) Click Continue.

13. If you haven't already, Transfer Your Files to the FTP Server.

14. Find the import you just configured and Perform a Test Run to ensure that the files are valid.

   Based on the results of the test run, fix any issues as necessary.

After the import has run, you can Data Loader Reports on page 1182 to see details about your import.

**Related Topics**

Data Loader on page 1167

With Data Loader you can set up automatic daily or hourly imports of your contact, order, and/or Coupon Manager data into Bronto.

Transfer Files To FTP Server For Data Loader on page 1168

Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.

**Delete Orders Using Data Loader**

You can use Data Loader to remove order data from Bronto.

You can delete both pending and processed orders. Once the order data is deleted from Bronto it cannot be recovered.

To delete order data:

1. Go to Tables > Data Loader.
2. Click Create Import.
3. Enter the relevant information in the Create Import Job window.
   a) Enter a name for the import in the Name box.
   b) Enter a description for the import in the Description box.
      The description is a good way to distinguish between similar imports.
   c) Select Delete Orders from the Type list.
   d) Click Create Import Job.
4. Click Upload Sample File To Begin Mapping to map the categories in your file to contact fields in Bronto.
   This let's Bronto know how to appropriately manage your contact data as it is imported.
5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   • Pipes |
   • Commas ,
   • Semicolons ;
   • Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the **Upload Sample File** window, select **Upload a file**.
   b) Select your file from the **Files** list.
   c) Click **Upload Sample File**.

   If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.

7. If you have transferred a file to the server that you want to map data for:
   a) In the **Upload Sample File** window, select **Select one of the files in your account**.
   b) Click **Choose File**, select your file in the finder window, then click **Open**.
   c) Click **Upload Sample File**.

   If the file upload is successful, the mapping page will be displayed.

8. Select the Bronto order field from the **Map to** list that matches the data shown for the column.

   Mapping helps the platform understand how to manage data as it is imported. For example, in the image below you would select **Email Address** for Column #1 and **Order ID** for Column #2. This way, when your email addresses are imported they are formatted like an email address, etc.

   ![Mapping Example](image)

   The available Bronto order fields are set; you cannot create new order fields. For more information about available order fields see **Order Fields / Order Details** on page 1025.

9. On the **Configuration** tab in the **General** area, configure the general settings for your import:
   a) Select **Yes** or **No** in the **Skip First Row Header** list.
   b) Select **30 days** or **3 days** from the **Cleanup Schedule** list.

   This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the **Filename Matching Scheme** list

   - **Ends with** will match files based on the extension specified for the **Filename Matching Pattern**. Only use **Ends with** when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, **Custom Glob** is the best choice.
   - **Starts with** will match files based on the characters specified for the **Filename Matching Pattern** starting with the first character. For example, if you have **contact** for the **Filename Matching Pattern** then all files on the FTP server that start with the word contact will attempt to be imported.
• **Custom Glob** will match files based on the characters and the extension specified for the **Filename Matching Pattern**. This allows you to use wildcards in order to build more complex import queries.

d) Enter a full or partial filename in the **Filename Matching Pattern** box.  

This is used in conjunction with the **Filename Matching Scheme** to recognize what files on the FTP server should be imported using this import job. If you use the **Custom Glob** option for **Filename Matching Scheme** you can use wildcards. Make sure the information you include here is specific enough that the import job won’t attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.

e) If you want to receive an email notification when your imports complete, enter an email address in the **Confirmation Email** box.

The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In the **Expected Data Format** area, configure how you want the data in your file to be managed as it is imported:

a) Select a delimiter from the **Delimiter** list.

b) If you plan to import date-based data, click the calendar icon under **Date Format** and fill in the options in the **Date Format Builder** window.

You must map a date-based field before you can configure **Date Format**. In the **Date Format Builder**, select a data from the **Example Date & Time** list, click **Go**, then click on each number in the date to select whether it is a **Day**, **Month**, or **Year**, and then click **Done**.

c) Select a currency type from the **Default Currency** list.

The currency should match the currency you have set for your Bronto account.

11. In the **Bronto Settings** area, enter the list name in the **Add Contacts to Specified Lists** box if you want to add contacts to a list as they are imported.

12. When you have finished import configuration, click **Save & Close**.

A window that asks you to confirm that you understand and have correctly configured whether your orders should be imported as pending or processed.

a) Select the **I Agree** box.

b) Click **Continue**.

13. If you haven't already, [Transfer Your Files to the FTP Server](#).

14. Find the import you just configured and [Perform a Test Run](#) to ensure that the files are valid.

Based on the results of the test run, fix any issues as necessary.

After the import has run, you can [Data Loader Reports](#) on page 1182 to see details about your import.

**Related Topics**

[Data Loader](#) on page 1167

With Data Loader you can set up automatic daily or hourly imports of your contact, order, and/or Coupon Manager data into Bronto.

[Transfer Files To FTP Server For Data Loader](#) on page 1168

Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.

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**Hosting**

Hosting allows you to easily store files (PDFs, images, custom font files, etc.) online in your account.

You can access Hosting from the **Content > Hosting** menu. Files you upload via hosting can be used in other areas of Bronto, like in messages.
All files hosted in the application are stored on Akamai.

**Upload Files To Bronto**

You can upload files to be hosted on Bronto.

Hosting is most commonly used to upload and store images that are used in message design. But you can also use hosting to upload PDFs, audio files, custom fonts, HTML files, etc. By default, your account includes a 100MB allocation limit for free hosting. (For Multi Brand accounts the default limit is 100MB per subaccount.) If you'd like to purchase additional hosting space, please contact your account manager.

To begin uploading hosted files:

1. Go to **Content > Hosting**.
2. Optional: If you want the hosted file to be stored in a specific folder, navigate to that folder.
   
   For more information about creating folders to manage your hosted files, see **Create A New Folder On The Hosting Page** on page 1162.
3. Click **Upload**.

   The Upload window is displayed. The list of acceptable file extensions are displayed.
4. Either
   • Drag files from your computer to the Drag files here window.
   • Click Add Files, select the files you want to add, and click Open.

   The maximum size allowed per file is 10MB.

5. Click Upload.

6. Click Close.

All files stored in the application hosting space are served through Akamai in order to optimize file download times. If you edit a file or upload a new file with the same name as an existing file, it may take a few minutes to update across the network. If it takes longer than 5-10 minutes for your file to update, try refreshing your browser. If this does not solve the problem, contact support.

Create A New Folder On The Hosting Page

You can create folders that can be used to organize your hosted files.

To create a new folder on the Hosting page:

1. Go to Content > Hosting.
2. Click Create then Folder.
   The Create new folder window is displayed.

3. Type in a name for your folder in the Name text box.
4. Click Create.

   The folder is created.

Edit A Hosted Image

You can perform basic image editing on your hosted images right in Bronto.
Bronto provides some basic image editing functionality for hosted images so you can tweak your images on the fly. With the hosted image editor you can adjust the size of an image or change various color settings.

To edit a hosted image:

1. Go to **Content > Hosting**.
2. Click the checkbox next to an image.
3. Click **Manage > Edit**.

   The image is opened in a basic image editor.

4. Click on the type of edit you want to make from the list of editing options.

   The editing tools for that option are displayed above the image and list of options.

5. Make the desired changes.
   - For **Resize** or **Crop**, enter new values in the boxes provided.
   - For **Flip/Rotate**, click on the relevant, provided buttons.
   - For most color options, slide the bar to the left or right. Some options instantly preview the change for you when you click on them.

6. To keep your change, click **Apply**.

   If you do not click **Apply** before you select another option, your work is not saved.
7. When you are done making edits to your image you can
   • Click **Save** to save your image and close the editor.
   • Click the X to close the image editor without saving any of your changes.
   • Click **Revert** to discard all of your changes but leave the image editor open.

**Move Hosted Files To Folders**
You can move hosted files between folders.

If a file is already used in a message, moving the file to a folder will break the message content. Therefore, make sure you update the path for a file in any existing messages when you move the file to a folder.

To move a hosted file:
1. Go to **Content > Hosting**.
2. Navigate to the location of the file(s) you want to move.
3. Click on the box next to the name of the file(s) you want to move.
4. Click **Manage** then click
   • **Cut** to remove the file(s) from the current location.
   • **Copy** to make a copy of the file(s) but leave the current copy in its current location.
5. Navigate to the folder you want to place the file in.
6. Click **Paste**.
   The file is added to the folder.

**Preview Hosted Files**
You can preview hosted files.

To preview a hosted file:
1. Go to **Content > Hosting**.
2. Click on the name of the file you want to preview.
3. Click **Manage**.
4. Click **View**.
   A preview of the file is displayed. To close the preview, click the X.
Filter or Sort Hosted Files

Filtering and sorting allows you to locate hosted files contained in a particular folder.

When you filter or sort, you are only working with the files in the folder you currently have open.

To filter or sort hosted files:

1. Go to Content > Hosting.
2. Select the folder you want to work with from the File Systems list.
3. To filter:
   a) Type in the name of the file you wish to locate in the Filter text box.

   ![Filter Icon]

   b) Click the Filter icon.

   The items that match the filter criteria are displayed. Filtering is not the same as searching. It does not locate files that are located in another folder.

4. To sort:
   a) Click Sort.
   b) Select a sort option from the list.

   You can sort by:
   - **Name**: file name alphabetical from A - Z
   - **Size**: smallest to largest
   - **Type**: file type alphabetical from A - Z
   - **Modification Date**: most recent to least recent

Rename A Hosted Folder or File

You can rename your hosted files and folders.
If a file in the folder is already used in a message, changing the name of the folder will break the message content. Therefore, make sure you update the path for a file in any existing messages when you change the folder name.

To rename a file or folder:

1. Go to **Content > Hosting**.
2. Click the checkbox next to an item.
3. Click **Manage**.
4. Click **Rename**.
   
The **Rename file** window is displayed.

5. Add a new name in the **Filename** text box.
6. Click **Rename**.

**Download Hosted Files or Folders**

You can download hosted files and folders.

When you download a folder, the folder is downloaded as a zip file.

To download a hosted file or folder:

1. Go to **Content > Hosting**.
2. Click on the box next to the name of the file(s) or folder(s) you want to download.
3. Click **Manage**.
4. Click **Download**.

The file(s) or folder(s) is downloaded to your computer.

**Add Hosted Files or Folders To Your Favorites**

You can add hosted files and folders to your favorites folder.

To add a hosted file or folder to your favorites:

1. Go to **Content > Hosting**.
2. Click on the box next to the name of the file(s) or folder(s) you want to download.
3. Click **Manage**.
4. Click **Add favorite**.

The file(s) or folder(s) is added to your **Favorites**. To access your favorites, click **Favorites** in the **FileSystems** menu.

**Delete Hosted Files or Folders**

You can delete hosted files and folders.

When you delete a folder, everything in the folder is also removed.

**Tip:** **Remove** is the last option in the **Manage** list, so sometimes it may look like it is not there. Simply use your mouse or keypad to scroll to the bottom of the list to see **Remove**.

To delete a hosted file or folder:
1. Go to Content > Hosting.
2. Click on the box next to the name of the file(s) or folder(s) you want to delete.
3. Click Manage.
4. Click Remove.
   If you do not see Remove in the Manage list, you might need to scroll to the bottom of the list.
5. Click Ok in the confirmation window.

**Zip Hosted Files**
If you have hosted files you want to keep but don't really use you can add them to a zip folder to save space.
When you add files to a zip folder, the original files are kept unless you manually delete them. Therefore, if your goal is to save space you should delete zipped files. However, files in a zip folder cannot be used so you should not delete anything you currently use or plan to use.

To zip and unzip files:
1. Go to Content > Hosting.
2. Navigate to the files you want to work with.
3. Click the checkbox next to the items you want to zip.
4. Click Manage.
5. Click Zip.
   The Create zip file window is displayed.
6. Enter the name in the Filename text box.
7. Click Create.
8. If you're trying to save storage space, select the files you added to the zip folder and go to Manage > Remove to delete them.
9. To unzip a zipped folder, select the folder and go to Manage > Unzip.

**Data Loader**
With Data Loader you can set up automatic daily or hourly imports of your contact, order, and/or Coupon Manager data into Bronto.

To view Data Loader, go to Tables > Data Loader.

To use Data Loader you:
1. Add files to an FTP site that Bronto provides.
2. Set up import jobs that scan this FTP location for files matching the import settings.
3. Update the files, or add additional import jobs, as you want to import new or updated content.

When Data Loader finds files matching a Filename Matching Pattern during a scan, it will attempt to run the associated import job. Data Loader will import any file that matches the Filename Matching Pattern for that import - there is no limit to the number of files you can import at once. After an import job is run you can view a report to see if your import was successful and to troubleshoot any issues that import may have had. Bronto scans the FTP site at the frequency you set for Data Loader imports and this setting can be adjusted from the main Data Loader page.

While we use the word import, and you are importing delimited data files, adding new content to Bronto isn't all the Data Loader is capable of. You can also use Data Loader to update existing contact or order data, to remove order data from Bronto, and to redeem coupon codes.
This table explains the elements on the main Data Loader page.

<table>
<thead>
<tr>
<th>Page Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Configured Imports</strong></td>
<td>Contains all of the configured imports for a account.</td>
</tr>
<tr>
<td></td>
<td>• Click the name of an import to view or adjust it.</td>
</tr>
<tr>
<td></td>
<td>• The <strong>Enabled</strong> toggle can turn on or off an import.</td>
</tr>
<tr>
<td></td>
<td>• The <strong>Actions</strong> buttons allow you to rename an import, create a copy of an import, run a test import, view reports for an import, or delete an import.</td>
</tr>
<tr>
<td><strong>Create Import</strong> button</td>
<td>Creates a new Data Loader import. For specific details about how to create a specific type of import, see the relevant Data Loader help topic.</td>
</tr>
<tr>
<td><strong>Account Information</strong> box</td>
<td>Displays</td>
</tr>
<tr>
<td></td>
<td>• The frequency in which configured imports are set to run. To adjust the import frequency, click the time settings to switch from Daily to Hourly, or click the hour shown to change the time of day imports will run.</td>
</tr>
<tr>
<td></td>
<td>• Provides a link to view FTP credentials</td>
</tr>
<tr>
<td></td>
<td>• Provides a link to change the FTP server password.</td>
</tr>
<tr>
<td><strong>Uploaded Files</strong> list</td>
<td>Is a list of files that have been added to the FTP server but have not been processed. You can click on a file to download it.</td>
</tr>
<tr>
<td></td>
<td>If a file remains in the <strong>Uploaded Files</strong> list after all scheduled imports have run, then the file did not match any configured imports. If you transfer a file to the FTP server but do not see it in this list, either</td>
</tr>
<tr>
<td></td>
<td>• The configured import ran between when the file was transferred and you checked the list.</td>
</tr>
<tr>
<td></td>
<td>• Or the file transfer was not successful.</td>
</tr>
<tr>
<td></td>
<td>To investigate, check the reports for the imports that would apply to the file. A test run does not remove a file from this list.</td>
</tr>
</tbody>
</table>

**Transfer Files To FTP Server For Data Loader**

Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.
You will need a valid FTPS/SFTP client to transfer the file(s) from your computer to your FTP account, or you can use cURL. For security, we’ve purposefully chosen non-standard FTPS and SFTP ports. This type of nonstandard port might confuse some FTP clients. FileZilla, for example, might not be able to properly recognize these ports. To work around this, prefix the host ftp.bronto.com with ftps:// for FTPS transfers or sftp:// for SFTP transfers. We do not support the insecure ftp:// protocol transfer.

The FTP credentials for your account can be found by clicking on Display FTP Credentials, located in the Account Information box on the main page of Data Loader. This is an example of what the FTP Credentials window looks like; your FTP Credentials will be specific to your account.

The general steps for transferring files is provided below. For specific details about how to complete an FTP transfer, see the documentation for your FTP client.

To transfer files to Bronto's FTP server:

1. Open the FTP client of your choice.
2. Use the FTP data provided in Data Loader to connect to the server.
3. Transfer your files.

If you wish to use cURL instead of an FTP client

4. Use the following command to upload files

   ```
curl -F "filename=@FILENAME" -F "username=USERNAME" -F "password=PASSWORD"
   https://ftp.bronto.com/upload
   ```

5. Use the following command to view a list of files

   ```
curl -F "username=USERNAME" -F "password=PASSWORD" https://ftp.bronto.com/
   list/uploads
   ```

6. Use the following command to delete files

   ```
curl -F "username=USERNAME" -F "password=PASSWORD" https://ftp.bronto.com/
   delete/FILENAME
   ```

### Add Or Update Contacts Using Data Loader

You can use Data Loader to add new contacts or update data for existing contacts.

You can create a single import that will add and update contacts, or multiple imports that each serve a different function. As you configure the import you will:

- Let the import know how to recognize which files on the FTP server should be imported.
- Map the headers in your file to contact fields in Bronto so that data is categorized and stored correctly.
• Configure General, Data Format, and Bronto-Specific settings in order to specify how you want your contact data to be managed.

Once configured, the import will automatically run based on the schedule you have set. You can see your contacts in Bronto by going to Tables > Contacts > Search Contacts. For more information see Search For Contacts In Your Account on page 896.

When you import a file, its contents are compared to existing data in Bronto. If a new record matches an existing record, Bronto will overwrite the existing record. This means if you import an update to a record that includes blank/null fields then the data stored in Bronto for the fields will be blank and/or null after the import.

However, when you import contact data you can set Bronto to ignore blank and null data so existing contact data is not overwritten. See step 12 d for more information.

To add or update contacts:

1. Go to Tables > Data Loader.
2. Click Create Import.
3. Enter the relevant information in the Create Import Job window.
   a) Enter a name for the import in the Name box.
   b) Enter a description for the import in the Description box.
   The description is a good way to distinguish between similar imports.
   c) Select Add or Update Contacts from the Type list.
   d) Click Create Import Job.
4. Click the Upload Sample File To Begin Mapping button to map the categories in your file to contact fields in Bronto.
   This let's Bronto know how to appropriately manage your contact data as it is imported.
5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   • Pipes |
   • Commas ,
   • Semicolons ;
   • Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the Upload Sample File window, select Upload a file.
   b) Select your file from the Files list.
   c) Click Upload Sample File.
   If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.
7. If you have transferred a file to the server that you want to map data for:
   a) In the Upload Sample File window, select Select one of the files in your account.
   b) Click Choose File, select your file in the finder window, then click Open.
   c) Click Upload Sample File.
   If the file upload is successful, the mapping page will be displayed.
8. Select the Bronto contact field from the Map to list that matches the data shown for the column.
Import

Mapping helps the platform understand how to manage data as it is imported. For example, in the image below you would select **Email Address** for Column #1 and **First Name (text)** for Column #2. This way, when your email addresses are imported they are formatted like an email address, etc.

The first fields listed as available for mapping in Data Loader are reserved fields. These fields are created by Bronto and are different from the custom contact fields that you can create.

**Table 10: Reserved Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>The email address stored for the contact. An email address is required in order to send emails. In some cases, you may not have an email address and may only have a mobile number or twitter handle.</td>
</tr>
<tr>
<td>Mobile Number</td>
<td>The mobile number stored for the contact. A mobile number is required in order to send SMS messages to a contact. In some cases, you may not have a mobile number for a contact (you may only have an email address or twitter handle).</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the contact.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> For more information on each type of contact status, see <a href="#">Contact Status</a> on page 1083.</td>
</tr>
<tr>
<td>IP Address</td>
<td>The IP address that is associated with a consent record.</td>
</tr>
<tr>
<td>Consent Date</td>
<td>The date of the last change or addition to the consent log for the contact.</td>
</tr>
</tbody>
</table>

The other contact fields available in this list are the contact fields you have created in Bronto. If you do not see a relevant field in the list, you can select **Create New Field in Bronto** and create a new contact field.

9. **Optional:** If you need to create a new contact field:
   a) Select **Create New Field in Bronto**.
   b) Enter a name for the field in the **Name** box.
   c) Enter a name for the field in the **External Name** box.
   d) Select the contact field type from the **Type** list.

   The contact field type indicates the type of data that can be stored in the field. For more the description and parameters for each field type see [Contact Field Types](#) on page 559.
Click Create Field.

10. When you have finished mapping your fields, click the Configuration tab to set up the import configuration.

11. In the General area, configure the general settings for your import:
   a) Select Yes or No in the Skip First Row Header list.
   b) Select 30 days or 3 days from the Cleanup Schedule list.

   This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the Filename Matching Scheme list
      • Ends with will match files based on the extension specified for the Filename Matching Pattern. Only use Ends with when this is your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, Custom Glob is the best choice.
        For example, .csv would match contacts_import.csv and contacts_09_2017.csv.
      • Starts with will match files based on the characters specified for the Filename Matching Pattern starting with the first character. For example, if you have contact for the Filename Matching Pattern then all files on the FTP server that start with the word contact will attempt to be imported.
        For example, contacts would match contacts_import.csv, contacts_09_2017.csv, and contacts_export.txt.
      • Custom Glob will match files based on the characters and the extension specified for the Filename Matching Pattern. This allows you to use wildcards (an asterisk) in order to build more complex import queries.
        For example contact*.csv.
   d) Enter a full or partial filename in the Filename Matching Pattern box.

      This is used in conjunction with the Filename Matching Scheme to recognize what files on the FTP server should be imported using this import job. If you use the Custom Glob option for Filename Matching Scheme you can use wildcards (an asterisk).

      Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.
   e) If you want to receive an email notification when your imports complete, enter an email address in the Confirmation Email box.

      The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.
   f) Select a job type from the Import Action list.

      If your files have a list of new and existing contacts you should choose Add or Update. Otherwise, choose Add to add new contacts, Update to change the information for existing contacts, and Delete to remove contacts.
   g) Select a contact status from the Add/Update Contacts With the Following Status list.

      If you are
      • Adding Contacts: you can choose to give new contacts onboarding, unconfirmed, or transactional status. Typically you would want to assign new contacts onboarding status so you can engage them in a welcome series where the contacts can opt-in to receiving your marketing emails.
      • Updating contacts: you can choose to give these contacts onboarding, unconfirmed, transactional, or unsubscribed status. But, unless changing the contact status is a primary reason for your import, typically best choice when updating contacts is Do Not Update.
      • Adding and Updating: when your import is both adding and updating contacts, the contact status you select is only applied to new contacts that are added. The status of updated contacts will not be changed.
If contacts are given an unconfirmed or transactional statuses, these contacts will need to double opt-in before they can be sent marketing messages from Bronto. These contacts can still be sent transactional messages. For more information see Contact Status on page 1083.

12. In the Expected Data Format area, configure how you want the data in your file to be managed as it is imported:
   a) If you want to change the delimiter from what you selected when you created the import, select a new delimiter from the Delimiter list.
   b) If you plan to import date-based data, click the calendar icon under Date Format and fill in the options in the Date Format Builder window.
      You must map a date-based field before you can configure Date Format. In the Date Format Builder, select a data from the Example Date & Time list, click Go, then click on each number in the date to select whether it is a Day, Month, or Year, and then click Done.
   c) Add the types of field data you want to be ignored during import to the Do Not Update Choices box.
      The options you can add here are null, blank, and 0. When you include these options in the Do Not Update Choices box, any existing data for these fields will not be overwritten. If you do not include one of these options here, then any field data previously in Bronto will be overwritten/erased.

13. In the Bronto Settings area, configure any Bronto-specific
   a) In Contact Custom Import Source provide the text representation of the contact's Source field.
      The Source field is found in the edit page for a given contact in your Bronto account. You can write whatever you want in the textbox, as the setting helps you audit your imports in Bronto, and keeps you informed from where your contacts are coming from.
   b) If you want to subscribe contacts to an SMS Keyword as they are imported, enter the keyword in the Add Contacts to Specified SMS Keywords box.
      Please note that the file must have mobile numbers mapped in order for the contact to be subscribed to the SMS keyword.
   c) If you want to add contacts to a list as they are imported, enter the list name in the Add Contacts to Specified Lists box.

14. When you have finished import configuration, click Save & Close.
    A window that asks you to confirm the legitimacy of the new contacts is displayed.
    a) Select the I Agree box.
    b) Click Continue.

15. If you haven't already, Transfer Your Files to the FTP Server.
16. Find the import you just configured and Perform a Test Run to ensure that the files are valid.
    Based on the results of the test run, fix any issues as necessary.

After the import has run, you can Data Loader Reports on page 1182 to see details about your import.

Related Topics
Data Loader on page 1167
With Data Loader you can set up automatic daily or hourly imports of your contact, order, and/or Coupon Manager data into Bronto.

Transfer Files To FTP Server For Data Loader on page 1168
Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.

Add or Update Order Data Using Data Loader
You can use Data Loader to add order data to Bronto or update order data that is already in Bronto.

You can use Data Loader's Add or Update Order option to add orders, update orders, or do both at once. Adding orders using Data Loader allows you to directly import order data without needing to configure commerce settings in the platform. Once the Data Loader import is configured, order data is added or updated every time a file matching the
import settings is found on the FTP server when the import is run. You can use a delimiter to offset each line item in your file and specify which delimiter was used in Data Loader.

When you import a file, its contents are compared to existing data in Bronto. If a new record matches an existing record, Bronto will overwrite the existing record. This means if you import an update to a record that includes blank/null fields then the data stored in Bronto for the fields will be blank and/or null after the import.

Once the import has run, you can go to Tables > Orders to view your orders or changes to your orders. For more information see Orders Page on page 1022.

To add and/or update order data:

1. Go to Tables > Data Loader.
2. Click Create Import.
3. Enter the relevant information in the Create Import Job window.
   a) Enter a name for the import in the Name box.
   b) Enter a description for the import in the Description box.
      The description is a good way to distinguish between similar imports.
   c) Select Add or Update Orders from the Type list.
   d) Click Create Import Job.
4. Click Upload Sample File To Begin Mapping to map the categories in your file to fields in Bronto.
   This let's Bronto know how to appropriately manage your order data as it is imported.
5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   • Pipes |
   • Commas ,
   • Semicolons ;
   • Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the Upload Sample File window, select Upload a file.
   b) Select your file from the Files list.
   c) Click Upload Sample File.
   If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.
7. If you have transferred a file to the server that you want to map data for:
   a) In the Upload Sample File window, select Select one of the files in your account.
   b) Click Choose File, select your file in the finder window, then click Open.
   c) Click Upload Sample File.
   If the file upload is successful, the mapping page will be displayed.
8. Select the Bronto order field from the Map to list that matches the data shown for the column.
   Mapping helps the platform understand how to manage data as it is imported. For example, in the image below you would select Email Address for Column #1 and Order ID for Column #2. This way, when your email addresses are imported they are formatted like an email address, etc.
The available Bronto order fields are set; you cannot create new order fields. For more information about available order fields see Order Fields / Order Details on page 1025.

9. On the Configuration tab in the General area, configure the general settings for your import:
   a) Select Yes or No in the Skip First Row Header list.
   b) Select 30 days or 3 days from the Cleanup Schedule list.

   This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the Filename Matching Scheme list

      • Ends with will match files based on the extension specified for the Filename Matching Pattern. Only use Ends with when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, Custom Glob is the best choice.
      • Starts with will match files based on the characters specified for the Filename Matching Pattern starting with the first character. For example, if you have contact for the Filename Matching Pattern then all files on the FTP server that start with the word contact will attempt to be imported.
      • Custom Glob will match files based on the characters and the extension specified for the Filename Matching Pattern. This allows you to use wildcards in order to build more complex import queries.

   d) Enter a full or partial filename in the Filename Matching Pattern box.

   This is used in conjunction with the Filename Matching Scheme to recognize what files on the FTP server should be imported using this import job. If you use the Custom Glob option for Filename Matching Scheme you can use wildcards. Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.
   e) If you want to receive an email notification when your imports complete, enter an email address in the Confirmation Email box.

   The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In the Expected Data Format area, configure how you want the data in your file to be managed as it is imported:
    a) Select a delimiter from the Delimiter list.
    b) If you plan to import date-based data, click the calendar icon under Date Format and fill in the options in the Date Format Builder window.
You must map a date-based field before you can configure **Date Format**. In the **Date Format Builder**, select a date from the **Example Date & Time** list, click **Go**, then click on each number in the date to select whether it is a **Day**, **Month**, or **Year**, and then click **Done**.

c) Add the types of field data you want to be ignored during import to the **Do Not Update Choices** box.

   The options you can add here are **null**, **blank**, and **0**. When you include these options in the **Do Not Update Choices** box, any existing data for these fields will not be overwritten. If you do not include one of these options here, then any field data previously in Bronto will be overwritten/erased.

d) Select a default shipping status to apply to orders during the import from the **Default Shipping Status** list.

   This is only applied to orders where the shipping status is not provided. The default is **Not Shipped**, but you can change this to **Shipped**.

e) Select an order status to apply to orders during the import from the **Default Order Status** list.

   This is only applied to orders where the order status is not provided. **Pending** orders are orders that have not been completed and **Processed** orders have been completed.

f) If you want workflows that are triggered by the Order Is Added or Order Is Shipped trigger nodes to recognize and trigger on changes to order and shipping statuses made by the import, set **Trigger Workflows on Status Update** to **Yes**.

   When set to **No**, imported orders with a change to either the shipping status or the order status will not trigger these workflows even if the status change typically would.

g) Select a currency type from the **Default Currency** list.

   The currency should match the currency you have set for your Bronto account.

11. In the **Bronto Settings** area, enter the list name in the **Add Contacts to Specified Lists** box if you want to add contacts to a list as they are imported.

12. When you have finished import configuration, click **Save & Close**.

   A window that asks you to confirm that you understand and have correctly configured whether your orders should be imported as pending or processed.

   a) Select the **I Agree** box.

   b) Click **Continue**.

13. If you haven't already, **Transfer Your Files to the FTP Server**.

14. Find the import you just configured and **Perform a Test Run** to ensure that the files are valid.

   Based on the results of the test run, fix any issues as necessary.

After the import has run, you can **Data Loader Reports** on page 1182 to see details about your import.

**Related Topics**

**Data Loader** on page 1167

With Data Loader you can set up automatic daily or hourly imports of your contact, order, and/or Coupon Manager data into Bronto.

**Transfer Files To FTP Server For Data Loader** on page 1168

Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.

**Delete Orders Using Data Loader**

You can use Data Loader to remove order data from Bronto.

You can delete both pending and processed orders. Once the order data is deleted from Bronto it cannot be recovered.

To delete order data:

1. Go to **Tables > Data Loader**.
2. Click **Create Import**.
3. Enter the relevant information in the **Create Import Job** window.
a) Enter a name for the import in the Name box.
b) Enter a description for the import in the Description box.

The description is a good way to distinguish between similar imports.
c) Select Delete Orders from the Type list.
d) Click Create Import Job.

4. Click Upload Sample File To Begin Mapping to map the categories in your file to contact fields in Bronto.

This lets Bronto know how to appropriately manage your contact data as it is imported.

5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.

The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:

- Pipes |
- Commas ,
- Semicolons ;
- Tabs

6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:

a) In the Upload Sample File window, select Upload a file.
b) Select your file from the Files list.
c) Click Upload Sample File.

If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.

7. If you have transferred a file to the server that you want to map data for:

a) In the Upload Sample File window, select Select one of the files in your account.
b) Click Choose File, select your file in the finder window, then click Open.
c) Click Upload Sample File.

If the file upload is successful, the mapping page will be displayed.

8. Select the Bronto order field from the Map to list that matches the data shown for the column.

Mapping helps the platform understand how to manage data as it is imported. For example, in the image below you would select Email Address for Column #1 and Order ID for Column #2. This way, when your email addresses are imported they are formatted like an email address, etc.
The available Bronto order fields are set; you cannot create new order fields. For more information about available order fields see Order Fields / Order Details on page 1025.

9. On the Configuration tab in the General area, configure the general settings for your import:
   a) Select Yes or No in the Skip First Row Header list.
   b) Select 30 days or 3 days from the Cleanup Schedule list.
      This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the Filename Matching Scheme list
      • Ends with will match files based on the extension specified for the Filename Matching Pattern. Only use Ends with when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, Custom Glob is the best choice.
      • Starts with will match files based on the characters specified for the Filename Matching Pattern starting with the first character. For example, if you have contact for the Filename Matching Pattern then all files on the FTP server that start with the word contact will attempt to be imported.
      • Custom Glob will match files based on the characters and the extension specified for the Filename Matching Pattern. This allows you to use wildcards in order to build more complex import queries.
   d) Enter a full or partial filename in the Filename Matching Pattern box.
      This is used in conjunction with the Filename Matching Scheme to recognize what files on the FTP server should be imported using this import job. If you use the Custom Glob option for Filename Matching Scheme you can use wildcards. Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.
   e) If you want to receive an email notification when your imports complete, enter an email address in the Confirmation Email box.
      The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In the Expected Data Format area, configure how you want the data in your file to be managed as it is imported:
    a) Select a delimiter from the Delimiter list.
    b) If you plan to import date-based data, click the calendar icon under Date Format and fill in the options in the Date Format Builder window.
       You must map a date-based field before you can configure Date Format. In the Date Format Builder, select a data from the Example Date & Time list, click Go, then click on each number in the date to select whether it is a Day, Month, or Year, and then click Done.
    c) Select a currency type from the Default Currency list.
       The currency should match the currency you have set for your Bronto account.

11. In the Bronto Settings area, enter the list name in the Add Contacts to Specified Lists box if you want to add contacts to a list as they are imported.

12. When you have finished import configuration, click Save & Close.
    A window that asks you to confirm that you understand and have correctly configured whether your orders should be imported as pending or processed.
       a) Select the I Agree box.
       b) Click Continue.

13. If you haven't already, Transfer Your Files to the FTP Server.

14. Find the import you just configured and Perform a Test Run to ensure that the files are valid.
    Based on the results of the test run, fix any issues as necessary.
Import

After the import has run, you can Data Loader Reports on page 1182 to see details about your import.

Related Topics
Data Loader on page 1167
With Data Loader you can set up automatic daily or hourly imports of your contact, order, and/or Coupon Manager data into Bronto.

Transfer Files To FTP Server For Data Loader on page 1168
Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.

Upload Coupon Manager Codes Using Data Loader
You can use Data Loader to upload Coupon Manager codes that you can use in your Coupon Manager campaigns.

In order to use this Data Loader feature, you must also have the Coupon Manager app. When you create an import job that uploads coupon codes, you are asked to associate the upload with a particular Coupon Manager campaign. Therefore, if you want to upload codes for multiple campaigns you need to configure a separate Data Loader import for each campaign. As long as you use the same filename matching pattern for each import, you will be able to upload coupon codes for each campaign from the same file or set of files.

To add or update contacts:

1. Go to Tables > Data Loader.
2. Click Create Import.
3. Enter the relevant information in the Create Import Job window.
   a) Enter a name for the import in the Name box.
   b) Enter a description for the import in the Description box.
      The description is a good way to distinguish between similar imports.
   c) Select Upload Codes from the Type list.
   d) Click Create Import Job.
4. Click Upload Sample File To Begin Mapping to map the categories in your file to fields in Bronto.
   This lets Bronto know how to appropriately manage your data as it is imported. For Upload Codes the only available field you can map is Coupon Code.
5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   • Pipes |
   • Commas ,
   • Semicolons ;
   • Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the Upload Sample File window, select Upload a file.
   b) Select your file from the Files list.
   c) Click Upload Sample File.
   If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.
7. If you have transferred a file to the server that you want to map data for:
   a) In the Upload Sample File window, select Select one of the files in your account.
   b) Click Choose File, select your file in the finder window, then click Open.
c) Click **Upload Sample File**.

If the file upload is successful, the mapping page will be displayed.

8. On the mapping page, select **Coupon Code** from the **Mapped to** list.

9. On the **Configuration** tab in the **General** area, configure the general settings for your import:
   a) Select **Yes** or **No** in the **Skip First Row Header** list.
   b) Select **30 days** or **3 days** from the **Cleanup Schedule** list.

   This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.

c) Select the method you want Bronto to use for filename matching from the **Filename Matching Scheme** list

   - **Ends with** will match files based on the extension specified for the **Filename Matching Pattern**. Only use **Ends with** when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, **Custom Glob** is the best choice.
   - **Starts with** will match files based on the characters specified for the **Filename Matching Pattern** starting with the first character. For example, if you have **contact** for the **Filename Matching Pattern** then all files on the FTP server that start with the word contact will attempt to be imported.
   - **Custom Glob** will match files based on the characters and the extension specified for the **Filename Matching Pattern**. This allows you to use wildcards in order to build more complex import queries.

d) Enter a full or partial filename in the **Filename Matching Pattern** box.

   This is used in conjunction with the **Filename Matching Scheme** to recognize what files on the FTP server should be imported using this import job. If you use the **Custom Glob** option for **Filename Matching Scheme** you can use wildcards. Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.

e) If you want to receive an email notification when your imports complete, enter an email address in the **Confirmation Email** box.

   The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In **Expected Data Format**, select the delimiter for your file from the **Delimiter** list.

11. In **Bronto Settings**, select the Coupon Manager campaign you want to associate the coupon codes with from the **Coupon Manager Campaign** list.

12. When you have finished import configuration, click **Save & Close**.

13. If you haven't already, **Transfer Your Files to the FTP Server**.

14. Find the import you just configured and **Perform a Test Run** to ensure that the files are valid.

   Based on the results of the test run, fix any issues as necessary.

After the import has run, you can **Data Loader Reports** on page 1182 to see details about your import.

**Related Topics**

*Transfer Files To FTP Server For Data Loader* on page 1168

Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.

**Redeem Coupon Manager Codes Using Data Loader**

You can use Data Loader to redeem Coupon Manager codes.

In order to use this Data Loader import, you must also have the Coupon Manager app. When you use the Redeem Coupon Codes import, you can also update order data related to the order the coupon code was used for.

To redeem codes:
1. Go to **Tables > Data Loader**.
2. Click **Create Import**.
3. Enter the relevant information in the **Create Import Job** window.
   a) Enter a name for the import in the **Name** box.
   b) Enter a description for the import in the **Description** box.
      The description is a good way to distinguish between similar imports.
   c) Select **Redeem Codes** from the **Type** list.
   d) Click **Create Import Job**.
4. Click **Upload Sample File To Begin Mapping** to map the categories in your file to fields in Bronto.
   This lets Bronto know how to appropriately manage your data as it is imported.
5. In the **Upload Sample File** window, select the delimiter used in your file from the **Delimiter** list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   - Pipes `|`
   - Commas `,`
   - Semicolons `;`
   - Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the **Upload Sample File** window, select **Upload a file**.
   b) Select your file from the **Files** list.
   c) Click **Upload Sample File**.
   If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.
7. If you have transferred a file to the server that you want to map data for:
   a) In the **Upload Sample File** window, select **Select one of the files in your account**.
   b) Click **Choose File**, select your file in the finder window, then click **Open**.
   c) Click **Upload Sample File**.
   If the file upload is successful, the mapping page will be displayed.
8. On the mapping page, map the values in the file by selecting a value from the **Mapped to** list.
   Make sure you map the **Coupon Code** to the coupon code in the file and map other order details as appropriate.
   At a minimum you must map a coupon code and an email address.
9. On the **Configuration** tab in the **General** area, configure the general settings for your import:
   a) Select **Yes** or **No** in the **Skip First Row Header** list.
   b) Select **30 days** or **3 days** from the **Cleanup Schedule** list.
      This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the **Filename Matching Scheme** list
      - **Ends with** will match files based on the extension specified for the **Filename Matching Pattern**. Only use **Ends with** when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, **Custom Glob** is the best choice.
      - **Starts with** will match files based on the characters specified for the **Filename Matching Pattern** starting with the first character. For example, if you have **contact** for the **Filename Matching Pattern** then all files on the FTP server that start with the word contact will attempt to be imported.
• **Custom Glob** will match files based on the characters and the extension specified for the **Filename Matching Pattern**. This allows you to use wildcards in order to build more complex import queries.

d) Enter a full or partial filename in the **Filename Matching Pattern** box.

This is used in conjunction with the **Filename Matching Scheme** to recognize what files on the FTP server should be imported using this import job. If you use the **Custom Glob** option for **Filename Matching Scheme** you can use wildcards. Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.

e) If you want to receive an email notification when your imports complete, enter an email address in the **Confirmation Email** box.

The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In the **Expected Data Format** area, configure how you want the data in your file to be managed as it is imported:

a) Select a delimiter from the **Delimiter** list.

b) If you plan to import date-based data, click the calendar icon under **Date Format** and fill in the options in the Date Format Builder window.

   You must map a date-based field before you can configure **Date Format**. In the Date Format Builder, select a data from the **Example Date & Time** list, click **Go**, then click on each number in the date to select whether it is a **Day**, **Month**, or **Year**, and then click **Done**.

c) Select a currency type from the **Locale** list.

   The currency should match the Locale setting you have set for your Bronto account. For more information see **Formatting Settings**.

11. In the **Bronto Settings** area, enter the list name in the **Add Contacts to Specified Lists** box if you want to add contacts to a list as they are imported.

12. When you have finished import configuration, click **Save & Close**.

13. If you haven't already, Transfer Your Files to the FTP Server.

14. Find the import you just configured and Perform a Test Run to ensure that the files are valid.

   Based on the results of the test run, fix any issues as necessary.

---

**Perform a Test Run With Data Loader**

A test run will import the first five rows of any files associated with an import in order to ensure that the files are correctly formatted.

It is a good idea to perform a test run after you set up a new configuration, make configuration changes, or add a new file to the FTP server. Test runs allow you to troubleshoot any formatting issues with a file or import before the data is imported into Bronto. It is much easier to prevent data issues than to fix them. You can only test imports that have been completely mapped, and have valid files to process. The test run will read the first 5 rows of each valid import file.

To perform a test run:

1. Go to **Tables > Data Loader**.
2. Find the import you want to test in the Data Loader table and click the **Test Run** button.
3. Click **Trigger Test Run**.
4. Find the import you want to view a report for in the **Data Loader** table and click the **View Report** button.
5. Use the details in the Info report to determine if the files are formatted correctly.

---

**Data Loader Reports**

You can view a report in Data Loader to see a list of your imports, general import statistics, run logs that contain import details, and the configuration settings for each import.
To access reports, go to Data Loader and click the **View Report** button.

From this page you can:

- Click the **View Settings** icon to view the configuration settings for the import.
- Click the **Completed At** timestamp to view the run log for a report. There are 3 types of logs that appear in the run log table:
  - **Info**: Are only available when used in conjunction with Test Run.
  - **Partial**: Represent formatting errors that may have occurred when parsing the file. Typically, the rows will import, but might be missing some data.
  - **Skip**: Represent rows that were not imported for a specific reason.

Each unique type of info is only listed once in the Bronto run log, even if it occurred several times. For example, if you forgot to include a required field then you would only see the Skipped because required field is missing entry once even though several entries were skipped because they were all missing the required field. This is by design in order to make it easier to understand the information in the run log. The error count for the run log entry will let you know how many times the error occurred. You can download a full run log report to view in-depth details about the import in order to troubleshoot issues.

- Click the **Export** icon to download the full report log associated with a report. The run logs in Bronto only persist for 30 days. If this information is important to you, please be sure to download within the 30 day window.
- Use the drop down menu to navigate between reports.

The following table contains all of the field displayed on the reports and run log pages.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report Metrics</strong></td>
<td></td>
</tr>
<tr>
<td>Runs Finished</td>
<td>Total number of attempted imports. This includes both successful and failed imports.</td>
</tr>
<tr>
<td>Average Skipped</td>
<td>Average number of rows that were not imported per import.</td>
</tr>
<tr>
<td>Average Duration</td>
<td>Average amount of time an import has taken to run.</td>
</tr>
<tr>
<td>Average Processed</td>
<td>Average number of rows that have been processed per import.</td>
</tr>
<tr>
<td><strong>Run Log Metrics</strong></td>
<td></td>
</tr>
<tr>
<td>Files Processed</td>
<td>Number of files that were included in this import.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Total Processed    | For contact imports: Total number of records (rows) in all files that were processed.  
                      | For order imports: Total number of orders in all files that were processed.        |
| Total Added        | Total number of records that were added to Bronto.                           |
| Total Updated      | Total number of records in Bronto that were changed.                         |
| Total Partials     | Total number of records in Bronto that were partially changed.               |
| Total Skipped      | Total number of records (rows) in the files that were skipped (not imported) due to an issue. |

#### Run Log Table Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Timestamp</td>
<td>When the import began.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of log report. This can be:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Halt</strong>: Represent formatting errors that may have occurred when parsing the file. Typically, the rows will import, but might be missing some data.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Partial</strong>: Represent formatting errors that may have occurred when parsing the file. Typically, the rows will import, but might be missing some data.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Skip</strong>: Represent rows that were not imported for a specific reason.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Info</strong>: Are only available for Test Runs.</td>
</tr>
<tr>
<td>Message</td>
<td>An explanation for the log.</td>
</tr>
<tr>
<td>Error Count</td>
<td>The number of rows that have errors that are associated with this message.</td>
</tr>
<tr>
<td>File</td>
<td>Which file the log event occurred in.</td>
</tr>
<tr>
<td>First Line #</td>
<td>Line number associated with the log event. If there are multiple instances of the event then only the first line number is provided here.</td>
</tr>
<tr>
<td>Example</td>
<td>If available, an example that is meant to help you better understand the log event.</td>
</tr>
</tbody>
</table>

### Data Loader Error Messages

There are a few of error messages you may see when using the Data Loader app.

The following will help you troubleshoot any error messages you may encounter when using Data Loader.

**Parser halted on file.csv: line (xxx) invalid char between encapsulated token and delimiter**

This means the CSV parser encountered an invalid format on the specific line number in the file, and stopped parsing the file for safety reasons. For comma delimiters, this most likely means that an embedded " character is within quoted columns. There are three possible fixes for this:

- Change the file format to tab delimiters, and drop the surrounding quotes around the columns.
- Escape the embedded quote by adding a " next to the embedded quote.
- Escape the embedded quote by prepending a \ before the embedded quote.
**111: Your IP address does not have access for token**

The error is due to security settings in your Bronto account regarding API access from an unknown IP. Go to **Home > Settings > Security**, check the box **Allow API access from unknown IPs not defined in Network Access**, and save the changes.

---

**Integrate**

Integrate Knowledge Base topics cover the Bronto connectors and the connections center, as well as setting up API and social account integrations.

**NetSuite Connector**

The NetSuite connector provides a seamless integration between your Bronto and NetSuite accounts so that contact and order data can be exchanged between them.

Configuring the NetSuite connector is a three step process. First, there are a series of prerequisites that need to be completed in NetSuite in order to prepare NetSuite for the data exchange. Next, a connection between Bronto and your NetSuite account needs to be established by installing the Bronto bundle in NetSuite and enabling the NetSuite Connector in Bronto. Once the connector is enabled, you will be able to see it in the list of connectors in Bronto.

Finally, you will need to **Edit** the NetSuite Connector settings in order to configure the connector to exchange contact data, import NetSuite transactions into Bronto as orders, and supply required configuration data for several of the Bronto apps.

When you enable a data exchange, the data exchange begins within 15 minutes after you click the **Save Changes** button (unless you have Test Mode enabled) and runs at the interval that you specified. The exchange of data continues to occur, as required, until you disable it.

Once the data is in Bronto it is treated the same as any other Bronto data, so it can be used in the same way.

On the main connector page you can also click:

- **Sync** to manually refresh the NetSuite connector with new settings. For example, if Bronto adds a new app that works with the connector, you would use sync to refresh the connector so the connector configuration settings for that app are displayed on the **Edit** menu.
- **Promote** to copy the settings from this connector to another connector.

**Set Up A NetSuite Connection**

Follow these steps to connect your NetSuite account to your Bronto account.

Before you configure the NetSuite Connector in Bronto, there are several prerequisites that need to be completed in NetSuite in order to prepare your NetSuite account for data exchange. Configuration steps in NetSuite:
• If not already assigned, assign your NetSuite integration user account the full access role. You must have a dedicated NetSuite integration user (employee) account that has a full access role in order to connect with Bronto.

• Set the time zone for the integration user account to Pacific time. If you cannot set this preference, it is because the Company General Preferences are blocking it. To remove this restriction, go to Setup > Company > General Preferences and then make sure that Time Zone is checked under the Overriding Preferences section.

• Make sure the following NetSuite SuiteCloud features are enabled: Client SuiteScript, Server SuiteScript, SuiteScript Server Pages, SuiteTalk Web Services, SuiteSignOn, and Token-Based Authentication.

• Install the Bronto Bundle.

• Locate and save the following NetSuite credentials you will need to enable the connector in Bronto: account ID, username, password, consumer key, and consumer secret.

  Note: The username and password are not stored in Bronto and the NetSuite Connector will not stop working if the password is changed for the employee/user account that is being used at a later time. The credentials are only used for the initial handshake of registration.

After NetSuite is properly set up and the NetSuite Connector is configured in Bronto, you will need to edit the NetSuite Connector settings before data exchanges will occur. If you plan to integrate SuiteCommerce Advanced with Bronto apps, you will need to complete additional configuration steps in NetSuite after the NetSuite Connector has been configured. See Configure NetSuite App Integrations on page 1196 for the full details about SuiteCommerce Advanced and Bronto app integration.

1. Complete all of the NetSuite configuration prerequisites listed above.
2. Go to Apps > Connector.
3. Click Add Connection.
4. Click NetSuite.
5. Enter the account ID for your NetSuite account in the Account ID box.
   To find the Account ID in NetSuite, go to Setup > Integration > Web Services Preferences.
6. Enter the NetSuite account username in the Username box.
   This is the NetSuite login username for the dedicated NetSuite integration user account that you set up for the connector.
7. Enter the NetSuite account password in the Password box.
   This is the NetSuite login password for the dedicated NetSuite integration user account that you set up for the connector.
8. Select the type of NetSuite account from the Instance Type list:
   This should reflect whether you NetSuite account is a Production or Sandbox account. If you're not sure, you probably have a production account. See NetSuite's Sandbox help topic for more information about Sandbox accounts.
9. Click Login.
   The connector uses the provided credentials to establish the connection between Bronto and NetSuite and you are returned to Bronto's Connectors page. You should see the NetSuite Connector you just configured in the list of connectors on this page.
10. Continue to the appropriate configuration topics to enable data exchange:
   • Click here to learn how to set up contact data exchanges
   • Click here to learn how to set up order data imports
   • Click here to learn how to set up app integrations

  Note: If interface modules do not load when you enter edit node, you might need to sync the connection.

Configure NetSuite Connector Contact Data Imports

The NetSuite Connector can be configured to exchange contact data between NetSuite and Bronto.
While Bronto only has the concept of one type of contacts, there are four types of "contacts" in NetSuite. For more information about NetSuite contact types see NetSuite's help topic. Part of setting up the contact import options includes identifying which types of NetSuite contacts you want to import or exchange contact data for. Because multiple versions of a contact record are supported in NetSuite but not in Bronto, take careful consideration of which NetSuite types you choose to map in order to avoid contact data in Bronto being overwritten due to multiple NetSuite records. You need to be mindful of Contact records n NetSuite, and consider if they are required because it is common to have duplicated records across Contact and Customer records. You might want to use a saved search in this scenario to exclude Contact records that share an email address with wither related Customer record.

Note: Inactive records in Netsuite are not included in the syncing process.

As you set up your contact data exchange options, you will need to determine what direction you want data to be synced. This allows you to choose whether you want data imported from NetSuite into Bronto, imported from Bronto into NetSuite, or data exchanged between the two. The data sync direction is set at the contact field level, so you can choose different sync options for each field and the fields you set are unique to each type of contact. For example, you could map a NetSuite prospect's lead source entity field to a Bronto contact field but not map/import this field for a NetSuite contact. Or you could import the credit limit entity field for both NetSuite prospects and customers but only allow Bronto updates to this field to be sent back for NetSuite customer records. (But not exchange for NetSuite contacts.) This flexibility allows you to implement the specific data exchange configuration that works best for your account needs. You need to be aware that we are using the entire record's last modified date and not the dates when the individual fields are changed.

Note: Contact status mappings are managed using the Global Subscription Status options on the Opt-Ins page. For more information see Configure NetSuite Connector Opt-Ins on page 1189.

When a record is imported into Bronto, an Imported to Bronto custom entity field is added to the record in NetSuite. If the record changes in NetSuite, this custom entity field is turned off so that the record can be considered for the next import. Changes to the Imported to Bronto custom entity field will trigger a NetSuite SuiteFlow workflow or User Event Script that is set to run based on record changes, so you might want to add a condition to your NetSuite workflows that will prevent this from happening. See the Test NetSuite Data Imports section for steps on how to verify in there are potential conflicts. For more information about NetSuite's custom entity fields see NetSuite's help topics and this NetSuite SuiteFlow topic for more information about NetSuite workflow conditions.

The Imported to Bronto custom entity field can also be used if you need to force an update of NetSuite data already imported into Bronto. If you change a NetSuite Connector mapping in Bronto, such as adding a new mapping, this change is only applied to future data exchanges. Because Bronto settings do not affect NetSuite's Imported to Bronto custom entity field, any previously imported record will have the custom entity field turned on, which means they won't automatically be imported using the new connector settings. If you want the new Bronto setting to be applied to previously imported records, you can use NetSuite's mass update functionality to turn off the Imported to Bronto custom entity fields so that Bronto will update all of these records, using the new Bronto settings, the next time an update runs. For more information about doing a mass update in NetSuite, see NetSuite's help topics.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Contacts.
4. Set Enabled to Yes.

Contact syncs cannot begin until you configure at least one contact type in the NetSuite Connector.

5. To set the import schedule:
   a) Click Advanced Options.
   b) Select how often you want imports to run from the Frequency list.

   By default imports are run in 1,000 record batches, so the frequency also determines the maximum number of records Bronto will attempt to import in a day. For example, if you set Frequency to Daily, the maximum number of record imports in a day will be 1,000. Inversely, if you set Frequency to once every hour, the maximum number of imports is 24,000 per day.
   c) Optional: If you selected Minute Intervals, select a number of minutes from the Interval list.
For example, if you select 30, imports will run at 30 minute intervals. We recommend 1 minute for the initial sync, and 15 minutes after that.

d) Set a Start Time.

e) Set an End Time.

If you selected daily, you will not see an option to set an End Time.

f) In the Days section, select which days of the week you want imports to run.

If a day box has a check mark, the import will run on this day at the interval frequency you set.

6. Click on the tab for the type of NetSuite contact you want to import.

You do not need to configure all four types; only configure the types you want to import. For more information about types of NetSuite contacts see NetSuite's help topic.

7. Configure the contact type import settings:

   a) Set Enabled to Yes.

   b) Select the Bronto list you want to add these contacts to as they are imported from the Bronto List options.

If you plan to import more than one type of contact, each contact type should be added to a different list. This will allow you to keep track of your NetSuite contact types in Bronto and you can use these lists to market to the different types as appropriate.

c) Indicate which direction you want to sync contact data by selecting the appropriate arrow from the New Contacts list:

This determines how new contacts are exchanged. You will configure how data for contacts is managed when you set up contact data mappings.

   • imports new contacts from NetSuite into Bronto but does not import Bronto contacts into NetSuite.

   • imports new contacts from Bronto into NetSuite but does not import NetSuite contacts into Bronto.

   • imports new contacts in both directions.

d) For NetSuite contact imports only: Select whether you want new contacts created in NetSuite to belong to the parent company or a subsidiary by selecting an option from the Subsidiary for New Contacts list.

If you select Parent Company, then the contact record will be available to all of the subsidiaries of the parent company.

e) Optional: If you want to apply the criteria defined for a NetSuite saved search, select that search from the Saved Search Filter list.

This limits the contacts who are imported to contacts who meet the criteria defined by the search. For more information see NetSuite's saved searches help topics. The most common reason to use this is when you want to import contacts from a particular NetSuite subsidiary into a specific Bronto Multi-brand sub-account.

Another common reason is to exclude contact that are known not to be relevant for email marketing, such as internal or vendor contacts. Contacts with masked email addresses from affiliates are also common. For example, Amazon provides customers with a @marketplace.amazon.com address, which cannot be used and should be excluded entirely.

f) Click Create New Mapping.

In order to import the details about a contact, you will need to map NetSuite entity fields to Bronto contact fields and indicate which direction you want to sync data. Create New Mapping adds new field mapping options to the bottom of the page that you can use to configure the data exchange for each field.

g) Select the NetSuite entity field you want to map from the NetSuite Entity Field list.

Default NetSuite fields are listed by their internal ID. To find the internal ID for a particular field in NetSuite, go to Home > Set Preferences > Select Show Internal Ids.

On any record, click in the help for field label to show the internal ID in the popup. Also see NetSuite schema Browser.

h) Select the direction you want to sync data for these fields from the Sync Direction list.
While the **New Contacts** sync settings determined whether contacts are imported from NetSuite into Bronto, vice versa, or exchanged this sync setting determines how the data for contacts is exchanged. Therefore, this mapping does not have to be the same sync direction that you selected for **New Contacts**, nor do all of the contact fields you map have to be mapped using the same direction.

See **Sync Empty Values** in the **Advanced** tab. When it is set to **No**, that setting overrides any other sync options you might have set. If it is set to **Yes**, the exchange of empty or blank data fields will follow the individual sync rules you set.

- **← Bronto is the master record. Updates NetSuite contact data with Bronto contact data, but does not update Bronto contacts with NetSuite data.**
- **→ NetSuite is the master record. Updates Bronto contact data with NetSuite contact data, but does not update NetSuite contacts with Bronto data.**
- **← Latest is primary. Data will sync in both directions and the most recently updated record in one system will update the other system with changes to the mapped field.**
- **→ Bronto is the master record. Existing Bronto field data will overwrite the NetSuite field. NetSuite will only write data to Bronto if the Bronto field is empty. It will not sync blank or empty values.**
- **← NetSuite is the master record. Existing NetSuite field data will overwrite the Bronto field. Bronto will only write data to NetSuite if the NetSuite field is empty. It will not sync blank or empty values.**

i) Select the contact field you want to map to the NetSuite entity field from the **Bronto Field** list.

You can also create a new Bronto field in the Connector interface. Make sure the data types for the Bronto field matches the expected data type for the field in NetSuite. For example, date, currency, or integer values. For custom NetSuite fields, go to **Customization > Lists, Records, & Fields > Entity Fields**.


**Note:** Bronto field names cannot exceed 25 characters. If you have issues creating a new field through the Connector, make sure the field name you're using is not already being used and not longer than 25 characters.

j) Repeat the **Create New Mapping** steps as many times as necessary until you have mapped all of the relevant fields.

8. Optional: If you want to map another type of NetSuite contact, click another tab and repeat the previous steps.

The field mapping settings are specific to the type of contact; you will need to map NetSuite entity fields to Bronto contact fields for each type of contact you configure. Because multiple versions of a contact record are supported in NetSuite but not in Bronto, take careful consideration of which NetSuite types you choose to map in order to avoid overwriting Bronto contact data due to multiple versions of a contact record in NetSuite.

9. When you have finished configuration for all of the import settings on the **Contacts** page, click **Save Changes**.

### Configure NetSuite Connector Opt-Ins

The NetSuite Connector opt-in settings allow you to associate NetSuite campaign subscriptions with Bronto lists and map NetSuite global subscription statuses to Bronto contact statuses.

The NetSuite Campaign Subscription Categories feature allows customers to choose which types of campaign communication they want to receive. Mapping a campaign subscription to a Bronto list will allow you to quickly and easily identify what level of engagement your imported NetSuite contacts have chosen. This information allows you to use Bronto lists to engage with these contacts appropriately. In order to map campaign subscriptions to Bronto lists, you must have already configured the campaign subscriptions in NetSuite. See NetSuite's help topics for more information about working with campaign subscriptions in NetSuite.

NetSuite's Global Subscription Status field on contact records determines whether or not a contact can receive email sent through NetSuite campaigns and email merge operations. There are four possible subscription statuses in NetSuite, but you can only use the connector to map the Confirmed Opt-In and Soft Opt-In statuses. These statuses
can be mapped to either Bronto's onboarding or unconfirmed statuses. Bronto contacts with a status of onboarding can automatically be moved to active status using Bronto's automated onboarding process. Bronto contacts with a status of unconfirmed have not yet agreed to receive marketing emails from you and must be moved from unconfirmed to active by somehow opting in. One way to move unconfirmed contacts to active status is to send them an email that includes a Subscription Confirmation webform which allows them to double opt-in. In order to meet CAN-SPAM compliance, contacts imported from NetSuite into Bronto with a Soft Opt-Out or Confirmed Opt-Out status are automatically set to unsubscribed. If you want to keep these contacts from being mapped to unsubscribed you will need to change their global subscription status in NetSuite.

Note: The opt-in settings are applied to contacts during NetSuite Connector contact imports and do not run independently.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Opt-Ins.
4. Set Enabled to Yes.
5. Optional: If you want to map campaign subscriptions to Bronto lists:
   a) Click the Campaign Subscriptions tab.
   b) Select the NetSuite campaign subscription from the NetSuite Campaign Subscription list.
   c) Select the Sync Direction:
      • updates the NetSuite campaign subscription with Bronto list changes, but does not update Bronto lists with NetSuite campaign subscription changes.
      • updates Bronto lists with NetSuite campaign subscription changes, but does not update NetSuite campaign subscription with Bronto list changes.
      • updates contact data in both directions.
      • updates contact data in both directions, but will not remove contacts from NetSuite campaign subscriptions when contacts are removed from Bronto lists.
      • updates contact data in both directions, but will not remove contacts from Bronto lists when contacts are removed from NetSuite campaign subscriptions.
   d) Select the Bronto list from the Bronto List options.
      If you need to create a new list, select Create New List In Bronto and use the pop up to create your list.
   e) To map another campaign subscription and list, click Create New Mapping and follow the previous steps.
6. To map NetSuite's global subscription statuses:
   a) Click the Global Subscription Status tab.
   b) Set the Sync Direction:
      • sets the Bronto status as the master record and always overwrites the status in NetSuite. This keeps the NetSuite opt-in statuses from resetting Bronto active contacts back to onboarding.
      • whichever record is most recently modified will overwrite the corresponding status in the other system.
   Tip:
      • If marketing status is not tracked or maintained in NetSuite, Sync direction should be set to Bronto as Master.
      • If you're using NetSuite Suite Commerce Advanced or Site Builder storefront integration with Bronto, Sync direction should be set to bi-directional to accept marking status updates from NetSuite.
• Net-new contacts in NetSuite, that do not already exist in Bronto when syncs, reflecting their existing NetSuite statuses. It is important to make sure your marketing preferences are accurate in NetSuite.

c) Select the Bronto contact status from the **Soft Opt-In Status Mapping** list.

If global subscription statuses in NetSuite are accurate and up-to-date, you should select **Onboarding**. If not, NetSuite statuses should be corrected before the initial sync, or **Unconfirmed** should be selected.

d) Select the Bronto contact status from the **Confirmed Opt-In Status Mapping** list.

We recommend settings these contacts to **Onboarding** because they have already opted-in via NetSuite.

e) If you'd like to set opt-out statuses in NetSuite for bounce and unsubscribe activities that occur in Bronto, set Soft Opt-Out for Unsubscribed and Soft Opt-Out for Bounce to Yes.

f) Optional: If you want to add contacts that have one of the NetSuite opt-in statuses to Bronto lists, select the lists using the **Add Opt-Ins to Lists** box.

g) Optional: If you want to remove contacts that have one of the NetSuite opt-out statuses from Bronto lists, set **Remove Opt-Outs from Lists** to Yes.

7. When you have finished configuration for all of the settings on the **Opt-Ins** page, click **Save Changes**.

### Configure Order Data Exchange With NetSuite

When you have the NetSuite connector configured it can be used to import NetSuite transaction data into Bronto as order data.

When a record is imported into Bronto, an **Imported to Bronto** custom entity field is added to the record in NetSuite. If the record changes in NetSuite, this custom entity field is turned off so that the record can be considered for the next import. Changes to the **Imported to Bronto** custom entity field will trigger a NetSuite SuiteFlow workflow or User Event Script that is set to run based on record changes, so you might want to add a condition to your NetSuite workflows that will prevent this from happening. See the Test NetSuite Data Imports section for steps on how to verify in there are potential conflicts. For more information about NetSuite's custom entity fields see NetSuite's help topics and this NetSuite SuiteFlow topic for more information about NetSuite workflow conditions.

The **Imported to Bronto** custom entity field can also be used if you need to force an update of NetSuite data already imported into Bronto. If you change a NetSuite Connector mapping in Bronto, such as adding a new mapping, this change is only applied to future data exchanges. Because Bronto settings do not affect NetSuite's **Imported to Bronto** custom entity field, any previously imported record will have the custom entity field turned on, which means they won't automatically be imported using the new connector settings. If you want the new Bronto setting to be applied to previously imported records, you can use NetSuite's mass update functionality to turn off the **Imported to Bronto** custom entity fields so that Bronto will update all of these records, using the new Bronto settings, the next time an update runs. For more information about doing a mass update in NetSuite, see NetSuite's help topics.

Once in Bronto, this order data can be used to trigger workflows, market to contacts based on their order history, and to track RFM metrics.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Orders**.
4. Set **Enabled** to **Yes**.
5. To set the import schedule:
   a) Click **Advanced Options**.
   b) Select how often you want imports to run from the **Frequency** list.

   By default imports are run in 1,000 record batches, so the frequency also determines the maximum number of records Bronto will attempt to import in a day. For example, if you set **Frequency** to **Daily**, the maximum number of record imports in a day will be 1,000. Inversely, if you set **Frequency** to once every hour, the maximum number of imports is 24,000 per day.

c) Optional: If you selected **Minute Intervals**, select a number of minutes from the **Interval** list.
For example, if you select 30, imports will run at 30 minute intervals. We recommend 1 minute for the initial sync, and 15 minutes after that.

d) Set a **Start Time**.

e) Set an **End Time**.

If you selected daily, you will not see an option to set an **End Time**.

f) In the **Days** section, select which days of the week you want imports to run.

If a day box has a check mark, the import will run on this day at the interval frequency you set.

6. Click on the tab for the NetSuite transaction type you want to map:

   • for more information about **Sales Orders** see NetSuite's [Sales Orders help topic](#)
   • for more information about **Cash Sales** see NetSuite's [Cash Sales help topic](#)
   • for more information about **Invoices** see NetSuite's [Invoices help topic](#)

7. Set **Enabled** to **Yes**.

8. Optional: If you want to limit the imported orders using a NetSuite saved search, select it from the **Saved Search Filter** list.

   You should be aware of how Sales Orders are processed and if they used to generate invoices in NetSuite. Multiple modules should be turned on only when these transaction types are not in conflict to avoid order duplication in Bronto. Turning on Sales Orders alone is adequate to reflect orders and attribution in Bronto, unless Cash Sales and Invoices are used to manage and create orders discretely and independently from Sales integration. Sales Orders will likely be the required transaction type for syncing, rather than Invoices. Also, Invoices and Cash Sales are bound by NetSuite accounting periods, which may limit the historical order data available for import to the existing open accounting period when you use these transaction types.

9. Select whether you want imported orders to have a **Pending** or **Processed** status in the **Status** list.

   In most cases, you will choose Processed unless an external process (using API or Data Loader) is in place to mark orders as Processed. Pending orders are not reflected in the RFM metrics in Bronto and do not show up in the user interface or trigger automated workflows.

10. Optional: If necessary, change the default **Order Attributes** mappings by selecting a new NetSuite value from the list.

    The Bronto order attributes are provided on the left and can be mapped to any valid NetSuite order attribute. Most order attributes are mapped to their expected NetSuite match and should not need to be changed, but you have the option to change them if you use different NetSuite values than those that are mapped. If you do not want to import any of the mapped, non-required attributes you can remove the mapping by clicking the X to the right of the NetSuite attribute name.

11. Optional: If necessary, change the default **Line Item Attributes** mappings by selecting a new NetSuite value from the list.

    The Bronto line attributes are provided on the left and can be mapped to any valid NetSuite line item attribute. If you do not want to import any of the mapped, non-required attributes you can remove the mapping by clicking the X to the right of the NetSuite attribute name.

    When you are not using NetSuite storefront, you might need to avoid mapping Category, Product URL, and Image URL fields for Order entities.

    These are the recommended default values for these fields when you are using Suite Commerce Advanced or Site Builder:

    • Description: Line Item Description
    • Category: Category (preferred)
    • Product URL: Item URL
    • Image URL: Image URL

12. Optional: If you use contact fields to track order data:

    The **Sync Direction** cannot be changed; this data will only be imported from NetSuite into Bronto.
a) Click **Create New Field Mapping**.
b) Select the NetSuite field from the **NetSuite Transaction Field** list.
c) Select the contact field from the **Bronto Contact Field** list.

13. Repeat the previous steps, as necessary, to map additional NetSuite transaction types.

14. When you have finished configuration for all of the import settings on the **Orders** page, click **Save Changes**.

Note: Only transaction body fields are available and will only sync data to contact fields related to the related contact's last transaction. These fields will be overwritten on each subsequent transaction.

**Configure NetSuite Transactional Messages**

The NetSuite Connector can send transactional email messages in response to some events that occur in the store. Bronto supports 4 transactional messages with NetSuite.

Before you can start using transactional messages with NetSuite you must be using one of these platforms:

- SuiteCommerce Advanced
- SiteBuilder
- SuiteCommerce Standard

There are 4 types of transactional messages that are supported.

- Order Received
- Order Approved
- Order Canceled
- Order Fulfilled

Note: Transactional messages are only triggered for webstore orders. Orders placed by phone or in-store will not trigger a transactional message.

To map NetSuite transactional messages:

1. Go to **Apps > Connector**.
2. Find the NetSuite connector and click **Edit**.
3. Click **Messages**.

**Important:** If you had a completed NetSuite integration before version 1.14.8, you need to sync the connector for the new Messages section to appear. From the connector dashboard, 'sync' the connection. You will then be prompted to authenticate to update permissions of the app as expected.

4. Configure the **General Settings**.

These are the settings that will be the default for each transactional message.

a) From E-Mail
b) From Name
c) Sender Authentication
   
   Sender authentication will sign your message with DomainKeys/DKIM (an authentication method that can optimize your message delivery to Hotmail, MSN, and Yahoo! email addresses).
d) Fatigue Override
   
   The delivery can be sent even if it exceeds frequency cap settings for a contact. For more information on Fatigue Override, see **Email Frequency Caps Override** on page 286
e) Reply Tracking
   
   Enabling Reply Tracking will store a copy of all replies to your messages on the Replies page. You may find this option convenient if you need someone other than the email address in the From line to read replies, or simply want the application to store replies. For more information on Reply Tracking, see **Email Replies** on page 317
f) Reply-To

5. Click the **Create New Message Mapping** button.
Integrate

6. For **Name**, choose a name for your message.
7. For **Bronto Message**, select the message you want to send or select **Create New Message in Bronto**.

   ![Note: If you choose Create New Message in Bronto, a blank message will be created for you. However, you will need to find this message (Messages > Messages) and design it.]

8. For **Reply-To, Use Default** box is already checked. If you want to use a different Reply-To address, uncheck the box and enter the address.
9. Select a **Message Mode**.
   - Send to whitelist only, don't disable NetSuite message
   - Send to all, disable NetSuite message

10. If you chose to send to a whitelist, enter an email address for **Whitelist for Testing**.
    After you test your message, make sure to come back to step 9 and select the correct Message Mode if you want to send your message to your contacts.
11. For **NetSuite Event Type**, select the NetSuite event that will trigger this message.
12. For **Website**, select the website you want the message associated with.
13. Optional: Click **Advanced Options**.
    If you do not want to use the General Settings for Sender Authentication, Fatigue Override, Reply Tracking, From E-Mail, or From Name for this message, uncheck the Use Default box and enter the value you want to use.
14. Click **Save**.

Now when NetSuite triggers one of these transactional messages, the message you created and mapped in Bronto will be sent.

**Delivery Fields for NetSuite Transactional Messages**

Delivery tags reference data from NetSuite and makes it available to use in your message. Using delivery tags in your message does not import the order from NetSuite.

The full set of transaction/order and customer variables are available for all messages. Fulfillment variables are limited to the Order Fulfilled message.

**Table 11: Order header-level fields**

<table>
<thead>
<tr>
<th>Delivery Field</th>
<th>NetSuite Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#order_tranid%%</td>
<td>tranid</td>
<td>The internal ID number for the transaction</td>
</tr>
<tr>
<td>%%#order_trandate%%</td>
<td>trandate</td>
<td>Order creation date</td>
</tr>
<tr>
<td>%%#order_total%%</td>
<td>total</td>
<td>Total</td>
</tr>
<tr>
<td>%%#order_subtotal%%</td>
<td>subtotal</td>
<td>Subtotal</td>
</tr>
<tr>
<td>%%#order_taxtotal%%</td>
<td>taxtotal</td>
<td>Tax Amount</td>
</tr>
<tr>
<td>%%#order_discounttotal%%</td>
<td>discoun</td>
<td>Amount discounted on this order</td>
</tr>
<tr>
<td>%%#order_status%%</td>
<td>status</td>
<td>Order status</td>
</tr>
<tr>
<td>%%#order_currencysymbol%%</td>
<td>currencysymbol</td>
<td>Description</td>
</tr>
<tr>
<td>%%#order_shippingcost%%</td>
<td>shippingcost</td>
<td>Shipping cost</td>
</tr>
<tr>
<td>%%#order_shipdate%%</td>
<td>shipdate</td>
<td>Shipping date</td>
</tr>
<tr>
<td>%%#order_shipmethod%%</td>
<td>shipmethod</td>
<td>Shipping service; for example, FedEx</td>
</tr>
<tr>
<td>%%#order_memo%%</td>
<td>memo</td>
<td>Order Memo</td>
</tr>
</tbody>
</table>
## Table 12: Order line-level fields

<table>
<thead>
<tr>
<th>Delivery Field</th>
<th>NetSuite Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#order_li_itemid_#%%</td>
<td>itemid</td>
<td>Item ID</td>
</tr>
<tr>
<td>%%#order_li_displayname_#%%</td>
<td>displayname</td>
<td>Item display name</td>
</tr>
<tr>
<td>%%#order_li_quantity_#%%</td>
<td>quantity</td>
<td>Line-item quantity</td>
</tr>
<tr>
<td>%%#order_li_rate_#%%</td>
<td>rate</td>
<td>Unit price</td>
</tr>
<tr>
<td>%%#order_li_amount_#%%</td>
<td>amount</td>
<td>Line total</td>
</tr>
<tr>
<td>%%#order_li_description_#%%</td>
<td>description</td>
<td>Item description</td>
</tr>
</tbody>
</table>
### Table 13: Fulfillment header-level delivery fields

<table>
<thead>
<tr>
<th>Delivery Field</th>
<th>NetSuite Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#ffill_tranid%%</td>
<td>tranid</td>
<td>Internal ID of item fulfillment record</td>
</tr>
<tr>
<td>%%#ffill_shipmethod%%</td>
<td>shipmethod</td>
<td>Shipping method; for example, FedEx</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_addr1%%</td>
<td>addr1</td>
<td>Fulfillment Address line 1</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_addr2%%</td>
<td>addr2</td>
<td>Fulfillment Address line 2</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_addr3%%</td>
<td>addr3</td>
<td>Fulfillment Address line 3</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_address%%</td>
<td>addressee</td>
<td>Fulfillment Addresssee; for example, John Smith</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_addrphone%%</td>
<td>addrphone</td>
<td>Fulfillment Address phone number</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_addrtex%%</td>
<td>addrtext</td>
<td>Fulfillment Address summary text</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_attention%%</td>
<td>attention</td>
<td>Fulfillment Attention text; for example, Attention: Accounts Payable</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_city%%</td>
<td>city</td>
<td>Fulfillment City</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_country%%</td>
<td>country</td>
<td>Fulfillment Country</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_state%%</td>
<td>state</td>
<td>Fulfillment State</td>
</tr>
<tr>
<td>%%#ffill_shipaddr_zip%%</td>
<td>zip</td>
<td>Fulfillment Zip Code</td>
</tr>
</tbody>
</table>

### Table 14: Fulfillment line-level delivery fields

<table>
<thead>
<tr>
<th>Delivery Field</th>
<th>NetSuite Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#ffill_line_qty_#%%</td>
<td>quantity</td>
<td>Quantity of line-item #</td>
</tr>
<tr>
<td>%%#ffill_line_itm_desc_#%%</td>
<td>itemdescription</td>
<td>Item description for line #</td>
</tr>
<tr>
<td>%%#ffill_line_itm_name_#%%</td>
<td>itemname</td>
<td>Item name for line #</td>
</tr>
<tr>
<td>%%#ffill_line_itm_units_#%%</td>
<td>units</td>
<td>Units for line #; for example, EA</td>
</tr>
<tr>
<td>%%#ffill_track_#%%</td>
<td>trackingnumbers</td>
<td>Package tracking numbers</td>
</tr>
</tbody>
</table>

### Table 15: Customer delivery fields

<table>
<thead>
<tr>
<th>Delivery Field</th>
<th>NetSuite Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#customer_cust_id%%</td>
<td>entityid</td>
<td>Entity ID; for example, John Smith</td>
</tr>
<tr>
<td>%%#customer_firstname%%</td>
<td>firstname</td>
<td>Customer first name</td>
</tr>
<tr>
<td>%%#customer_lastname%%</td>
<td>lastname</td>
<td>Customer last name</td>
</tr>
<tr>
<td>%%#customer_company_name%%</td>
<td>companyname</td>
<td>Company name</td>
</tr>
</tbody>
</table>

**Configure NetSuite App Integrations**

When the NetSuite Connector and a SuiteCommerce Advanced integration are configured the Integrations page can be used to complete the connection between your SuiteCommerce Advanced web store and several Bronto apps.
Using the NetSuite connector to configure a connection between a Bronto app and NetSuite can supply some of the set up data required for various applications and will pass data between your web store and Bronto. Apps that you can integrate include:

- Cart Recovery. This connection uses the cart and order data from your NetSuite web store to supply Cart Recovery data.
- Pop-Up Manager. This connection deploys Bronto pop-ups to your NetSuite web store.
- Coupon Manager. This connection sends coupon redemption statistics for your NetSuite web store to Bronto.

In order for these integrations to work, you need to complete the SuiteCommerce Advanced Bronto integration steps explained in this NetSuite help topic prior to setting the NetSuite Connector integrations.

1. Complete the NetSuite SuiteCommerce Advanced integration steps.

   The Bronto accountId required for the SuiteCommerce Advanced configuration is the NetSuite Connector’s instance ID. You can find this on the Bronto’s Connector page by clicking the arrow to the right of the domain. Make sure you copy the entire instance ID, but you do not need to copy the words Instance ID:

   ![Image showing the instance ID](https://rest.na1.netSuite.com)

2. Go to Apps > Connector.
3. Locate the connector you want to work with and click its Edit link.
4. Click Integrations.
5. Find the app you want to use NetSuite with and set Enabled to Yes.
6. Optional: If you enabled Cart Recovery, enter the tag manager code in the Embed Code box.

   This can be found on the Commerce Settings page in Bronto.
7. Optional: If you enabled Pop-Up Manager, enter the domain for your site in the Domain box.
8. When you have finished configuring all of you app integration settings, click Save Changes.

### NetSuite Connector Advanced Options

The NetSuite Connector Advanced page provides several options you can use to tweak and/or test your connector settings.

Each option on this page is explained in the table below:

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Mode</td>
<td>Enabling this turns off the exchange of data. You might want to use test mode if you are concerned there is a problem with the connector. It is enabled by default for Sandbox accounts.</td>
</tr>
<tr>
<td>Settings</td>
<td>If Sync Empty Values is set to No, empty fields will not be exchanged between NetSuite and Bronto. When set to No, this setting overrides any other sync options you may have set. If set to Yes, the exchange of empty/blank data fields will follow the individual sync rules you set.</td>
</tr>
<tr>
<td>Concurrency</td>
<td>This determines the volume for consecutive imports. If you feel like data exchange is causing network lag issues, you can adjust this to a lower number in order to decrease the import volume.</td>
</tr>
</tbody>
</table>
Integrate

Test NetSuite Data Imports
You can test whether your connection will import NetSuite data into Bronto as expected.

A test attempts to import a single contact or order record using either the contact's email address or the order's order ID. You do not have to have test mode on to test an import and have the option to decide whether or not to save the test record in Bronto.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Advanced.
4. To test a contact import:
   a) In the Schedule Task section, select Test Contact Import from the Task list.
   b) Select the type of NetSuite contact from the Stage list.
      For more information about NetSuite contact types see NetSuite's help topic.
   c) Enter a NetSuite contact's email address in the Email Address box.
   d) Select Yes or No from the Import Into Bronto list.
      If you select Yes, the data is saved in Bronto as you test. If you select No, the data is not saved in Bronto.
   e) Click Execute.
5. To test an order import:
   a) In the Schedule Task section, select Test Order Import from the Task list.
   b) Select the NetSuite order record type from the Type list.
   c) Enter the NetSuite order ID in the Order Internal ID box.
      You can find the internal ID in the URL when you view the record in NetSuite. For example:
      https://system.nal.netsuite.com/app/accounting/transactions/salesord.nl?id=32726&whence=
   d) Select Yes or No from the Import Into Bronto list.
      If you select Yes, the data is imported into Bronto as you test. If you select No, the data is not saved in Bronto.
   e) Click Execute.
6. After the import completes, refresh the contents of Connector Advanced page.
7. Scroll to the Execution Results section and click View Results to view the detailed results of your import. You can also look up the contact in Bronto, if you chose to import to Bronto.

Note: The Connector will only show results for one completed task at a time.
8. Make any adjustments you need to in the Contact Import settings and repeat the process with another example contact until the data is consistent with what the client wants.

9. Complete additional verification in NetSuite after you test imports.
   a) Look at the system notes and workflow history for the imported record back in NetSuite to make sure that there are not any additional changes made from other customer scripts/workflows in NetSuite.
      To find this information, view the transaction record. Click on the **System Information** tab. The System Notes should only include the Bronto-specific fields changed by the integration, and potentially other fields that change from a blank old value to a new, default New Value.
   b) If there are additional actions taken on the record after the scripts run by the Integrations user, this can indicate additional scripts or workflows being triggered by the changes you make. In these cases, your NetSuite Administrator should work to identify the exact workflow or script responsible and edit it to have more specific triggers.

   **Note:** Test imports of individual records are only a simulation of the impact the full sync process could have on the synced NetSuite records. Certain criteria that are only met under specific circumstances on records, such as scripts that run when a specific record attribute criteria are met might not be identified using individual test imports.

---

**NetSuite Tips, Best Practices, and Troubleshooting**

**Missing custom attribute for NetSuite contacts/customers/transactions are not showing up in the Connector**
- Related records are not supported.
- If the attribute was recently created, you might need to sync the Connector from the dashboard and then look for the attribute again.
- **Available to SuiteSignOn** needs to be checked.
- If there are more than 1000 custom field entities, there is a NetSuite API limitation to only bring back 1000 fields. The number of custom entity fields needs to be reduced.
- Make sure the connection with NetSuite is properly established. You might need to reconnect.

**Missing saved search in NetSuite is not showing up in Connector**
- In NetSuite, the **Public** checkbox should be selected for Saved Search.
- **Available As Dashboard View**, **Available As Sublist View**, and **Available as List View** should not be selected. Selecting these causes the saved search to not be returned by through the API.
- If the saved search was created recently, you might need to sync the Connector from the dashboard and then look for the saved search again.
- Make sure the connection with NetSuite is properly established. You might need to reconnect.

**Avoid Bronto integration making changes to NetSuite customer or transaction records**
- If unwanted or unexpected changes are being made, a NetSuite workflow or user event script is likely what is causing the changes after Bronto imports and saves the record.
  1. If the issue is problematic and ongoing, you should turn off the **Import Schedule** in Connector for the affected record types until you can identify what workflow or script is causing the unwanted changes.
  2. Running individual test imports before taking the Connector out of test mode allows us to circumvent this as much as possible. It is critical that each record type that is being used is tested to verify that no unwanted or unexpected changes are being made to NetSuite records after they are imported to Bronto.
  3. This is an example of what you should expect to see after a transaction record has been imported to Bronto. All of these modified fields are part of our integration and are found under the Bronto tab.
Avoid unwanted overwriting of unsubscribes or contact data in Bronto

- If you have been using Bronto (sending/uploaded lists and contact data) before turning on the Connector (taking the Connector our of Test Mode and allowing the import schedules to take over), you should think about where your primary system of record is for each of the following pieces of data:

  1. **Contact Attributes**
     
     If your attributes are primary to NetSuite, they should complete the initial sync with a blue arrow for all attributes that are mapped in the Connector. This ensures that all attribute data from NetSuite comes into Bronto first.

  2. **Opt-In Status**
     
     If you have already imported lists of active contacts into Bronto from another ESP that is not NetSuite, you should complete the initial sync with a green arrow for Global Subscription Status, even if you want a bi-directional sync going forward. This ensures that any contacts that already exist in Bronto will maintain their status.

  3. **Campaign Subscriptions**
     
     If your campaign subscriptions are primary to NetSuite, you should complete the initial sync with a blue arrow for all subscriptions that are mapped in the Connector, even if you want a bi-directional sync going forward. This ensures that all subscriptions mirror NetSuite at first.

- After the initial/historical sync of all NetSuite data has completed, you can set a bi-directional sync for any of the above data.

**Soft-Opt out by default NetSuite Marketing preference**

As a permission-based marketing platform, we recommend setting Soft-Opt Out as the default for record creation in NetSuite, unless the SetSuite storefront requests users for their marketing preference on account creation. This setting can be found under **Setup > Marketing > Marketing Preferences**

**Notes on Sandbox testing (optional)**

- You can configure the Connector to operate in test mode to test the integration in Sandbox, to avoid making changes to Production records.

- A Sandbox connection can be configured with field mappings, but the NetSuite Sandbox should be refreshed before implementation, to make sure the most recent data fields are in place.

  **Note:** Subsequent sandbox refreshes will affect the employee and integration records required by the integration, and potentially disable any existing Sandbox connections.

- Configuration can be promoted from Sandbox to Production with one click using the promote feature on the Connector dashboard.
• If you are configuring a Sandbox and you do not have a Bronto Sandbox, you could leverage a small saved search in NetSuite to fully test the Connector integration, limiting the syncing to only a handful of contacts. This would allow you to take the connector out of test mode and see near real-time updates when records are changed.
• We recommend using a Bronto Sandbox for complete testing.

**Common reasons for Connector sync failure**

• Leaving fields unmapped (or mapped fields being deleted from Bronto) can cause the import process to fail.
• Lists used in the Connector that have been removed from Bronto before being removed from the Connector configuration. Please contact support if you suspect this issue.
• The most common cause of this is the client removing, de-activating, or removing the “Full Access” role from the NetSuite Employee record that was used to initiate the connection.
• Incorrect data types or mapping to order/line item fields that do not exist in NetSuite.
• Mass email address duplication. A large number of contacts (50+) sharing the same email address can slow down the import process considerably. Potentially de-dupe in NetSuite or used Saved Searches to exclude contacts from syncing.

**Redirect to cart on SiteBuilder- Recommended Setting**

• If the you have a Site Builder storefront, the Bronto integration for cart recovery is not able to send updated cart line item information on the shopping portion of the site (product pages, category pages, home page, etc.). It is recommended for you to redirect contacts to the cart page when an item is added to the cart. This setting can be found in NetSuite by going to Setup > SiteBuilder > Set Up Web Site. Click Edit for the relevant site if multiple sites are present, then click on the Shopping tab.

**Avoid duplicate orders when using Bronto Integrations third-party storefronts**

If you are using a third-party storefront, such as Magento, Demandware, or otherwise, where you have deployed our Commerce JavaScript for conversion tracking purposes, you should take measures to make sure that you do not duplicate orders in Bronto. Below are the two most common ways to accomplish this:

• Use a Saved Search filter in the order settings, where the Saved Search in NetSuite excludes orders from the website altogether.
• Create a custom transaction body field in NetSuite that will contain a dynamic (coalesced) value for the order id on the transaction records. Do not configure to store values in this field. This method allows you to not limit the transactions imported, but rather insure that the Order Number value will match the customer order id values provided in your Storefront integration.
  • Example formula: COALESCE({custbody_magento_id}, {tranid})
  • Map this field for Order ID in Connector Orders configuration appropriately.

**Perform a mass update in NetSuite**

**Bronto Commerce config cart phases and views settings**

**Registration Issues**

The reasons why a Connector instance will not initially register, or has stopped syncing, include:

• Incorrect username or password
• Password or email contains special characters
• Full access role is not assigned to integration user
• All required features are not enabled
• Give Access is not selected on the integration user account
• IP login restrictions
• Bronto bundle is not installed
• Wrong tokens or Account ID

**How to re-register a connection**

Sometimes, a Connection might need to be re-registered. There is not a method for editing an existing Connector instance registration settings. To re-register a Connection:

1. Click **Add Connection** from the Connector Dashboard.
2. Select **NetSuite**.
3. Complete the required registration fields (regenerating consumer key/secret tokens in NetSuite if you do not know them)
4. Select **Production** or **Sandbox** for Instance Type.
5. Click **Save**.

The existing registration will be overwritten, but the Connector settings will be retained.

**Interpret Connector sync results**

• When Connector is out of test mode, the progress indicator and execution results are available in the Import Schedule for Order and Contact modules.
  
  This includes progress of connector based a total of all applicable available records synced, as of the last run of the sync.
• Saved searches, such as a date range filter, can limit the total number of records presented.
• Records with Soft opt-out or Confirmed opt-out statuses are synced to Bronto as Transactional contacts. The totals of synced records in connector results include these contacts.
• Results include duplicate (records in NetSuite that have the same email address) or suppressed contacts (known invalid email addresses).
• Note: If you see a large number of suppressed contacts, this could indicate based on bad field mapping with wrong data type selected.

**SSL Certificate and custom checkout domains pre-requisite**

In order to properly track email conversions on completed orders in Bronto for Suite Commerce and Site Builder commerce integrations, we require that the checkout domain match the domain of the website, to allow our tracking scripts to set and transfer first party cookies to the checkout.

NetSuite makes this process self-service through the documentation below, but does require technical expertise with managing DNS records and SSL certificates. You should contact your NetSuite account manager to ensure your site is able to use this feature, and if you will require further support or professional services.

For this functionality to work correctly, set up a custom checkout subdomain in NetSuite, as well as purchase and install a SSL certificate.

In recent releases of SuiteCommerce Advanced, you also have the option of using a “Single Secure Domain for Shopping and Checkout which will also require an SSL certificate but has an added benefit of running the shopping site under https, which is advantageous for SEO purposes. This might require additional testing and validation that the shopping portion of the site operates correctly using https.

**Find Bronto Connector related logging in NetSuite**

• NetSuite Sync processes in Script Execution Logs: **Customization > Scripting > Script Execution Logs**
• NetSuite Bronto registration and discovery process: **Setup > Integration > Web Services Usage Log**.
Shopify Connector

The Shopify Connector provides a seamless integration between your Bronto and Shopify accounts so that Shopify data can be imported and used in Bronto.

**Important:** You will not be able to configure the Shopify Connector properly if your Bronto account does not use Order Service. For more information, contact your account representative.

Configuring the Shopify Connector is a two step process. First you need to establish a connection between Bronto and your Shopify account and enable the Bronto app in Shopify. Once the connector is enabled you will be able to see it in the list of connectors.

To finish setting up the connector, click the Shopify Connector **Edit** link in order to access the configuration options for data imports. The connector can import contact, order, and/or product data as well as be used to supply required configuration data for several of the Bronto apps. When you enable a data import, the data exchange will begin within 15 minutes after you click the **Save Changes** button, unless you have turned the Test Mode on. The exchange of data will continue to occur, as required, until you disable a data import. Once the data is in Bronto it is treated the same as any other Bronto data, so it can be used in the same way.

On the main connector page you can also click:

- **Sync** to manually refresh the Shopify Connector with new settings. For example, if Bronto adds a new app that works with the connector, you would use sync to refresh the connector so the connector configuration settings for that app are displayed on the **Edit** menu.
- **Promote** to copy the settings from this connector to another connector.

### Set Up A Shopify Connection

Follow these steps to connect your Shopify account to your Bronto account.

In order to successfully configure a connection between Shopify and Bronto the following prerequisites must be met:

- Your Bronto account must be configured to use order service. If you're not sure if you use order service, contact your account manager.
- Your Shopify account must be configured to let Bronto have access permissions to the following Shopify scopes: read_orders, write_customers, read_products, write_script_tags, and write_themes. See Shopify's documentation related to OAuth authentication for more details about how to grant this access.

This topic only covers how to perform the initial connector set up. After you connect your Shopify account to Bronto, you will need to use Bronto to configure what data is imported and map Shopify data to Bronto data, as appropriate. For information about how to do configure different data imports, see the Shopify Connector topic for the type of data you want to import.

1. Go to **Apps > Connector**.
2. Click **Add Connection**.
3. Click **Shopify**.
4. Enter the domain for your Shopify account in the **Shop Domain** box.
   
   You can acquire your domain from the URL bar when you are logged into your Shopify account.

5. Select whether this Shopify account is a **Production** or **Sandbox** account from the **Instance Type** list.
   
   This indicates whether the account you're using is "live" or not. It works as an indicator to people working with the connector and does not affect the data in Bronto. If desired, you can configure both types of connections and promote the settings from one connection to the other.

   **Note:** You cannot register the same Shopify store to both a production and sandbox connection in a single Bronto account. Each Shopify store can only be registered to one Bronto connector instance. This also means that you cannot connect the same Shopify store in more than 1 Bronto account. This applies to any DNS entry that resolves to the same mystore.myshopify.com domain as well.

   When you finish your testing, you can click the promote icon, enter the domain of the production instance, and click **Prepare**. Doing this will promote the settings from your Sandbox to your Production site.

6. Click **Login**.

7. Log into your Shopify account.

8. If prompted in Shopify, add the Bronto app to your Shopify account.

   The connection is configured and is shown on the list of configured connectors in Bronto. The connection is not exchanging data with Bronto at this point.

9. Continue to the appropriate configuration topics to enable data exchange:
   
   - Click **here** to learn how to set up contact data imports
   - Click **here** to learn how to set up product data imports
   - Click **here** to learn how to set up order data imports
   - Click **here** to learn how to set up app integrations
   - Click **here** to learn how to import historical contact or order data

### Configure Shopify Contact Data Imports

When you have the Shopify Connector configured it can be used to import your Shopify customers into Bronto as contacts.

When Shopify customers are imported into Bronto as contacts, the email address and any other fields you mapped between Bronto and Shopify are imported. A list of common Shopify attributes are provided for mapping on the **Contacts** page and you can use the Create New button to add additional field mappings. Any attribute that is not mapped will not be imported.

By default, imported Shopify contacts have a transactional **contact status**. However, on the **Opt-Ins** page you can configure the connector to use Shopify's **accepts_marketing** flag to identify contacts who have opted-in to Shopify marketing. For more information about how to do this see Configure Shopify Opt-Ins on page 1205.

   **Note:** If you want to test these settings before you start an import, make sure **Test Mode** on the **Advanced** page is set to **Yes**.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Contacts**.
4. Set **Enabled** to **Yes**.
5. Optional: If you want to import fields that have empty values, set **Sync Empty Values** to **Yes**.
   
   We recommend setting this to **No** in order to avoid overwriting valid data. If this is set to **Yes**, when a field in Bronto contains data but the corresponding Shopify attribute is blank, the value in Bronto is deleted and replaced with the empty Shopify value on import.

6. In the **Attributes** area, map Shopify attributes to Bronto contact fields by selecting contact fields from the list associated with each Shopify attribute.
If you need to add a new Bronto contact field, select **Create New Field in Bronto** from the list and use the pop up to create the new contact field. Then make sure this new field is selected in the list.

7. In the **Default Address** area, map Shopify address attributes to Bronto contact fields by selecting contact fields from the list associated with each Shopify default address field.

8. Optional: If you want to import Shopify customer metafields:

   All of the information you need to supply about the metafield can be found in Shopify.

   a) Click the **Create New** button.
   b) Click **Customer Metafield to Contact Field Mapping**.
   c) Enter the Shopify customer metafield in the **Key** box.

   The key is the identifier for a metafield.
   d) Enter the in the **Namespace** box.

   The namespace functions as a container for a set of metafields which help to distinguish between metadata that you created and metadata created by others with a similar namespace.
   e) Select whether the metafield is a **String** or **Integer** from the **Value Type** list.
   f) Select the Bronto contact field from the **Field** list.

   If you need to add a new Bronto contact field, select **Create New Field in Bronto** from the list and use the pop up to create the new contact field. Then make sure this new field is selected in the list.
   g) Click **Save**.

9. Optional: If you want to use Shopify customer tags to assign contacts imported from Shopify to lists:

   If you need to add a new Bronto list, select **Create New List in Bronto**.

   a) Click the **Create New** button.
   b) Click **Customer Tag to Contact List Mapping**.
   c) Enter the Shopify **customer.tag** value in the **Tag** box.

   To map multiple tags to the same list, offset the tags with a comma.
   d) Select the Bronto list from the **Lists** options.

   If you need to add a new Bronto list, select **Create New List in Bronto** from the list and use the pop up to create the new list. Then make sure this list is selected.
   e) Click **Save**.

10. When you have finished configuration for all of the import settings on the **Contacts** page, click **Save Changes**.

**Related Topics**

**Contact Status** on page 1083

Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

**Configure Shopify Opt-Ins**

You can configure Shopify Connector to use Shopify's `accepts_marketing` flag to identify contacts who have opted-in to marketing and import these contacts with an onboarding status.

By default, imported Shopify contacts have a transactional contact status. However, on the **Opt-Ins** page you can configure the connector to use Shopify's `accepts_marketing` flag to identify contacts who have opted-in to Shopify marketing. If **Opt-Ins** is enabled, customers with the Shopify `accepts_marketing` flag are imported with an onboarding status and can be marketed to. Shopify customers without the flag are still imported as transactional contacts.

The checkbox tied to Shopify's `accepts_marketing` flag is always present on a Shopify checkout page. This means a contact who previously opted-in will have the `accepts_marketing` flag removed from their account if the box is not checked the next time the contact makes a purchase. When the `accepts_marketing` flag is removed in Shopify, Shopify sends this information to Bronto and the contact's status is switched from active/
Integrate onboarding to transactional. To avoid this, configure Shopify to have the `accepts_marketing` checkbox selected by default. This ensures that contacts are only made transactional at their request.

Note: If you want to test these settings before you start an import, make sure Test Mode on the Advanced page is set to Yes.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Opt-Ins.
4. Set Enabled to Yes.
5. If you want an unsubscribed contact status in Bronto to override the Shopify `accepts_marketing` flag, set Sync Bronto Unsubscribes to Yes.

   Enabling this maintains the unsubscribed status of Bronto contacts so they are not marketed to. If this is set to No, then the presence of the `accepts_marketing` flag overrides the unsubscribed contact status and gives these contacts onboarding status.

6. If you want to add these contacts to a list, select the list(s) from Add Opt-Ins to Lists.
   If you need to add a new Bronto list, select Create New List in Bronto.
7. If you want to remove these contacts from a list, select the list(s) from Remove Opt-Outs from Lists.
8. Click Save Changes.

Note: If you want to test these settings before you start an import, go to the Advanced page and set Test Mode to Yes.

Related Topics

Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Configure Shopify Product Data Imports

When you have the Shopify Connector configured it can be used to import your Shopify product data into the Bronto product catalog.

Shopify stores product data by storing parent products with variants, where Bronto stores each product variant as its own product. There are two ways this impacts product data imports. First, when a parent product in Shopify only has a single variant Bronto will still import both a parent and variant for that product and will fill in all parent product fields with the sole variant's data.

Secondly, sometimes Shopify stores title data for a variant in the parent product which can lead to incomplete product title field data in Bronto. To prevent this you will need to indicate how you want to populate the title product field in Bronto for products by selecting the Shopify value to use for variant titles from the Variant Title Format and indicating if you want to append the Shopify parent product title to the variant title as you import product data. The combination of these two options determine what is stored for a product title in Bronto. For example, the title for a parent product in Shopify might be Shirt and the title for a variant is Red. If you set

- **Variant Title Format** to Shopify Original Value and **Add Parent Title To Variant** to No, the Bronto product title for the product (variant) will be Red.
- **Variant Title Format** to Shopify Original Value and **Add Parent Title To Variant** to Yes, the Bronto product title for the product (variant) will be Shirt - Red.
- **Variant Title Format** to Parent Title and **Add Parent Title To Variant** to No, the Bronto product title for the product (variant) will be Shirt.

The following Shopify product attributes are mapped automatically from Shopify to Bronto products when you enable product data imports:
### Table 16: Bronto and Shopify Mapped Fields

<table>
<thead>
<tr>
<th>Bronto Product Field</th>
<th>Shopify Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product ID</td>
<td>id</td>
<td>The unique API ID of the parent product or the unique API ID of the variant (Example: 7256427462716). See note above for how Bronto's treatment of parents and children is different than how Shopify approaches variants.</td>
</tr>
<tr>
<td>Title</td>
<td>title</td>
<td>Includes the name of the product. See note above to configure how the variant title displays.</td>
</tr>
<tr>
<td>Description</td>
<td>body_html</td>
<td>The Description field in Shopify, which stored in HTML (Example: &lt;p&gt;This is an amazing bike.&lt;/p&gt;).</td>
</tr>
<tr>
<td>Image URL</td>
<td>image_url</td>
<td>The product image for a variant or the parent image.</td>
</tr>
<tr>
<td>Parent Product ID</td>
<td>product_id</td>
<td>The parent Product ID for a variant product.</td>
</tr>
<tr>
<td>Product Category</td>
<td>product_type</td>
<td>The category of a product.</td>
</tr>
<tr>
<td>Product URL</td>
<td>product_url</td>
<td>The product URL. For variants, the variant identifier will be appended to the URL string (Example: /products/hat?variant=123456†).</td>
</tr>
<tr>
<td>Quantity</td>
<td>variant.inventory_quantity</td>
<td>The number of remaining items (Example: 45). Quantity will only display on a parent product if there is only one variant.</td>
</tr>
</tbody>
</table>
| Price                | variant.price or variant.compare_at_price | Note:

Bronto and Shopify handle price in a different way. In Shopify, the **Compare at price** is the full price for an item. When a **Compare at price** is set, the Shopify **Price** is the sale price of a product. In comparison, the Bronto **Price** for a product is the full price of an item and the **Sale Price** is the discounted price for a product on sale.

If a parent product has multiple variants then the variant_price is not imported for the parent product. When a parent product has a single variant, the variant_price for the variant is also used for the parent product.

The price of a product (Example: 35.99). When the Shopify **Compare at price** is blank, the Bronto **Price** is the Shopify **Price**. When the **Compare at price** is populated, the Bronto Price is the **Compare at price** value in Shopify.

| Sale Price           | variant.price (not always populated) | Note:

If a parent product has multiple variants then the sale_price is not imported for the parent product. When a parent product has a single variant, the sale_price for the variant is also used for the parent product.

The discounted price of the variant (Example: 30.00). This will only have a value when the Shopify **Compare at price** is populated. When the Shopify **Compare at price** is populated, then the Shopify **Price** corresponds to the Bronto **Sale Price** for a product.
You can use the **Create New** button to map additional Shopify product attributes to Bronto product fields. Once enabled, you can see the mapped product fields by going to **Tables > Products** and clicking on **View Product Fields**. Product imports/updates will automatically run roughly every 15 minutes, but can also be run manually from the **Advanced** page.

**Note:** If you want to test these settings before you start an import, make sure **Test Mode** on the **Advanced** page is set to **Yes**.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Products**.
4. Set **Enabled** to **Yes**.

Once this is enabled, the product fields listed above are automatically imported.

5. Select the Shopify product attribute you want to use to supply the variant title from the **Variant Title Format** list:

   - **Shopify Original Value** Uses the data found in the variant's title field.
   - **Parent Title** Uses the data found in the parent product title field.
   - **Variant Option X** Uses the data found in Shopify option selected. So if you select Option 1, then the variant's data stored for Option 1 in Shopify will be imported.
   - **Option 1 / Option 2 / Option 3** Uses the data for all three options with each option separated by a / in Bronto's product title field.

6. Indicate whether you want to add **Parent Title To Variant** in a product's title in Bronto.

   When you select **Yes** the parent title followed by a - will be included before the rest of the title data in Bronto.

7. Optional: If you want to import additional fields:

   a) Click **Create New**.
   b) Select a Shopify product attribute from the **Product Attribute** list.
   c) Select a Bronto product field from the **Catalog Field** list.
   d) Click **Save**.

   You can repeat this set of steps as many times as necessary to map all of the relevant Shopify product attributes.

8. Optional: If you want to import Shopify product metafields:

   All of the information you need to supply about the metafield can be found in Shopify.

   a) Click the **Create New** button.
   b) Click **Product Metafield to Catalog Field Mapping**.
   c) Enter the Shopify product metafield in the **Key** box.

   The key is the identifier for a metafield.

d) Enter the in the **Namespace** box.

   The namespace functions as a container for a set of metafields which help to distinguish between metadata that you created and metadata created by others with a similar namespace.

e) Select whether the metafield is a **String** or **Integer** from the **Value Type** list.

   f) Select the Bronto product field from the **Field** list.

g) Click **Save**.

   You can repeat this set of steps as many times as necessary to map all of the relevant Shopify product metafields.

9. When you have finished configuration for all of the import settings on the **Products** page, click **Save Changes**.

10. Optional: If you want to manually update your Bronto product catalog:

    a) Click **Advanced**.
    b) Select either:

       - **Sync Catalog Field Mappings** to kick off a manual import of the new product field mappings you made.
- **Sync Recently Updated Products** to kick off a manual import of all of the mapped Shopify product attributes.

c) Click **Execute**.

**Related Topics**

*Include Product Data In Cart and Order Tags* on page 174

When you use the Order Service and have imported product data, you can use a combination of product and cart data in your messages.

**Configure Shopify Order Data Imports**

When you have the Shopify Connector configured it can be used to import your Shopify order data into Bronto.

Importing Shopify order data into Bronto will allow you to see RFM metrics on this data and use the data for emails and for the Cart and Browse Recovery apps.

**Note:** If you want to test these settings before you start an import, make sure **Test Mode** on the **Advanced** page is set to **Yes**.

The following Shopify order attributes are mapped automatically from Shopify to Bronto when you enable order data imports:

**Table 17: Bronto and Shopify Mapped Order Fields**

<table>
<thead>
<tr>
<th>Bronto Order Field</th>
<th>Shopify Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Id</td>
<td>order_id or order_number or name depending on setting</td>
<td>See overview of Order ID, Order Number, and Order Name.</td>
</tr>
<tr>
<td>Email</td>
<td>email</td>
<td>The email address associated with an order.</td>
</tr>
<tr>
<td>Origin IP</td>
<td>browser_ip</td>
<td>The IP address of the customer at the time the order was made (Example: 111.111.104.210).</td>
</tr>
<tr>
<td>Ordered</td>
<td>created_at</td>
<td>The date and time the order was created in Shopify in ISO 8601 format.</td>
</tr>
<tr>
<td>Currency</td>
<td>currency</td>
<td>Currency code for the order (Example: USD).</td>
</tr>
<tr>
<td>Discount Amount</td>
<td>total_discount</td>
<td>The total amount of the discounts applied at checkout.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>subtotal_price</td>
<td>The sum of the the order's line-item prices after any line-item discount or cart discount has been deducted.</td>
</tr>
<tr>
<td>Grand Total</td>
<td>total_price</td>
<td>The total price of the order at checkout.</td>
</tr>
<tr>
<td>Tax Amount</td>
<td>total_tax</td>
<td>The sum of taxes applied to the order.</td>
</tr>
<tr>
<td>Shipping Tracking URL</td>
<td>tracking_url</td>
<td>The URL used to track the fulfillment (Example: <a href="http://track.com/startairmail.php?code=11234522345">http://track.com/startairmail.php?code=11234522345</a>).</td>
</tr>
<tr>
<td>Shipping Date</td>
<td>updated_at</td>
<td>The date and time when the fulfillment was last modified in ISO 8601 format.</td>
</tr>
<tr>
<td>Shipping Details</td>
<td>tracking_company</td>
<td>The name of the tracking company (Example: UPS).</td>
</tr>
</tbody>
</table>
## Table 18: Bronto and Shopify Mapped Line Item Fields

<table>
<thead>
<tr>
<th>Bronto Line Item Field</th>
<th>Shopify Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>item.variantId or item.sku</td>
<td>The unique ID of the item. If there is a variant, it will be the variantId.</td>
</tr>
<tr>
<td>Name</td>
<td>item.title</td>
<td>Title of the line item. Defaults to the product's title.</td>
</tr>
<tr>
<td>Quantity</td>
<td>quantity</td>
<td>The quantity of the line item.</td>
</tr>
<tr>
<td>Unit Price</td>
<td>price</td>
<td>The price of the line item's variant.</td>
</tr>
<tr>
<td>Sale Price</td>
<td>price</td>
<td>The discount price of the line item.</td>
</tr>
<tr>
<td>Total Price</td>
<td>line_price</td>
<td>The combined price of all the items in the line_item if set. Or, the value of price * quantity.</td>
</tr>
<tr>
<td>Description</td>
<td>body_html</td>
<td>The Description field in Shopify, which stored in HTML (Example: <code>&lt;p&gt;This is an amazing bike.&lt;/p&gt;</code>). This field is only available when you have enabled product data imports in the Shopify Connector.</td>
</tr>
<tr>
<td>Image URL</td>
<td>image_url</td>
<td>The product image for a variant or the parent image. This field is only available when you have enabled product data imports in the Shopify Connector.</td>
</tr>
<tr>
<td>Product Category</td>
<td>product_type</td>
<td>The category of a product. This field is only available when you have enabled product data imports in the Shopify Connector.</td>
</tr>
<tr>
<td>Product URL</td>
<td>product_url</td>
<td>The product URL. For variants, the variant identifier will be appended to the URL string (Example: <code>/products/hat?variant=123456</code>). This field is only available when you have enabled product data imports in the Shopify Connector.</td>
</tr>
</tbody>
</table>

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Orders.
4. Set Enabled to Yes.
5. Select whether you want imported Shopify orders to have a Pending or Processed status in the Bronto Order Status list.
6. Select the Shopify order statuses you want used to determine that an order should be imported from the Orders to Import list.
   An order status can be removed from the list by clicking the X icon on a status.
7. Select the Shopify order statuses you want used to determine that an order should be deleted from Bronto from the Orders to Delete list.
   You might want to remove an order from Bronto in order to clear up your RFM statistics. An order status can be removed from the list by clicking the X icon on a status.
8. Select what Shopify field to map to the Bronto Order ID using the Map Bronto Order ID From drop-down. The default is the Shopify Order Number.
   **Option**
   **Order Number**
   Example: 1001. Order Number is a unique numeric identifier for the order that is used by the shop owner and customer. This is different from the Order ID property, which is also a unique numeric identifier for
Integrate

Option

the order, but is generally much longer and only used by programmers working with the API.

Order Name

Example: #1001. Order Name is the Order Number preceeded by a pound symbol. It is used by shop owners who prefer that their order identifiers do not begin with a number.

Order ID

Example: 380770159904. The API identifier for the order.

9. Select the Shopify line item other field that you want to map to Bronto’s line item Other field from the Other Field list.

SKU

10. If you want to map a Shopify order property to a contact field:

This will import the most recent order property value provided for each contact.

a) Click Create New.

b) Click Last Order Property To Contact Field Mapping.

c) Select the Shopify value from the Order Property list.

d) Select the Bronto contact field from the Contact Field list.

If you need to add a new Bronto contact field, select Create New Field in Bronto from the list and use the pop up to create the new contact field. Then make sure this new field is selected in the list.

e) Click Save.

You can repeat this set of steps as many times as necessary to map all of the relevant Shopify order properties.

11. Optional: If you want to import Shopify order metafields:

All of the information you need to supply about the metafield can be found in Shopify.

a) Click the Create New button.

b) Click Last Order Metafield to Contact Field Mapping.

c) Enter the Shopify order metafield in the Key box.

The key is the identifier for a metafield.

d) Enter the in the Namespace box.

The namespace functions as a container for a set of metafields which help to distinguish between metadata that you created and metadata created by others with a similar namespace.

e) Select whether the metafield is a String or Integer from the Value Type list.

f) Select the Bronto contact field from the Contact Field list.

If you need to add a new Bronto contact field, select Create New Field in Bronto from the list and use the pop up to create the new contact field. Then make sure this new field is selected in the list.

g) Click Save.

You can repeat this set of steps as many times as necessary to map all of the relevant Shopify order metafields.

12. When you have finished configuration for all of the import settings on the Orders page, click Save Changes.

Note: If you want to test these settings before you start an import, go to the Advanced page and set Test Mode to Yes.

Configure Shopify App Integrations

When you have the Shopify Connector configured it can be used to supply data to several Bronto apps.

Using the Shopify Connector to configure a connection between a Bronto app and Shopify can supply some of the data set up required for various applications. Apps that you can integrate with Shopify include:
• Browse Recovery. This connection will send browse related events from your Shopify domain to the app. If you enable this, you must also identify Shopify as your **Commerce Platform Integration** in the **Selectors** settings for Browse Recovery.

• Cart Recovery. This connection will use the cart and order data from your Shopify domain for the Cart Recovery data. How this works varies based on whether a contact starts the checkout process.

  • When a contact starts the checkout process but leaves the site before completing their order, Bronto will capture Shopify’s unique URL for that checkout and send it to the Cart Recovery app. This unique URL always contains the full contents of the cart.
  
  • When a contact adds items to a cart but doesn't initiate the checkout process, or begins to checkout but then returns back to the store, Bronto can only capture a generic cart URL that's based on the contact's browsing session. In this case the information sent to Cart Recovery may not contain all of the items in the cart.

If you enable this, you should remove the embedded tag manager from your site if it is already configured.

• Pop-Up Manager. This connection will deploy your pop-ups to your Shopify domain. If you enable this, you should remove the embedded code snippet from your site if it is already configured.

• Coupon Manager. This connection sends coupon redemption stats for your Shopify domain to Bronto.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Integrations**.
4. Find the app you want to use Shopify with and set **Enabled** to **Yes**.
5. If you enabled Browse Recovery, make sure you have **configured your Browse Recovery selectors to use Shopify**.
6. If you enabled Cart Recovery, enter the CSS selector used to capture emails on your site in the **Email Capture CSS** box.

   If you have previously set up Cart Recovery by **adding the Tag Manager custom embed code to your site**, you should remove it.

   **Note:** The Shopify Connector currently does not import the product URLs or image URLs from cart events into Bronto, but can import these from your product feed. If your product catalog is up-to-date in Bronto, you can pull product URLs or image URLs from the catalog in order to use them in Cart Recovery messages. For more information see **Include Product Data In Cart and Order Tags** on page 174.

7. If you enabled Pop-Up Manager, enter the domain for your site in the **Domain** box.
8. When you have finished configuring all of you app integration settings, click **Save Changes**.

**Related Topics**

- **Include Product Data In Cart and Order Tags** on page 174
- **Capture Browse Data** on page 1463
- You can configure Bronto to capture browse data from your site. Browse data is information about which products your contacts view.

**Test Shopify Connector Data Imports**

You can test whether your configuration will import Shopify data into Bronto as expected.

When test mode is turned on, new Shopify events are not imported into Bronto actively.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Advanced**.
4. In the **Test Mode** section, select **Yes** from the **Enabled** list.
5. To test a contact import:
   a) In the **Test Import** section, select **Contact** from the **Type** list.
b) Enter a Shopify customer email address in the Customer Email box.

c) Select Yes or No from the Import Into Bronto list.

If you select Yes, the data is imported into Bronto as you test. If you select No, the data is not saved in Bronto and you can view the results output in Execution Results.

d) Click Execute.

6. To test an order import:

   a) In the Test Import section, select Order from the Type list.

   b) Enter the Shopify order ID in the Order ID box.

   c) Select the Shopify order status from the Order Status list.

      If you do not know the status, or the status is not listed, you can select Any.

   d) Select Yes or No from the Import Into Bronto list.

      If you select Yes, the data is imported into Bronto as you test. If you select No, the data is not saved in Bronto and you can view the results output in Execution Results.

   e) Click Execute.

7. To test a product import:

   a) In the Test Import section, select Product from the Type list.

   b) Enter the Shopify product ID in the Product ID box.

   c) Select Yes or No from the Import Into Bronto list.

      If you select Yes, the data is imported into Bronto as you test. If you select No, the data is not saved in Bronto and you can view the results output in Execution Results.

   d) Click Execute.

8. Scroll to the Execution Results section and click View Results to view the detailed results of your import.

9. When you have completed testing, in the Test Mode section, select No from the Enabled list.

   This will resume normal Shopify imports.

Configure Shopify Transactional Messages

The Shopify Connector can send transactional email messages in response to some events that occur in the store. Bronto supports 4 transactional messages with Shopify.

There are requirements you must meet before you can start using transactional messages with Shopify:

- You must have Shopify Plus.
- You must have a Product Catalog populated in Bronto.

There are 4 types of transactional messages that are supported. These messages will not consider a contact's opt-in status when determining whether to send a message on your behalf. They are similar to the Notification section in Shopify and designed to take over the role of those notifications.

<table>
<thead>
<tr>
<th>Notification</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Account Welcome</td>
<td>Customer creates an account</td>
</tr>
<tr>
<td>Order Confirmation</td>
<td>A new order is created</td>
</tr>
<tr>
<td>Order Cancelled</td>
<td>An order is canceled</td>
</tr>
<tr>
<td>Shipping Confirmation</td>
<td>An order is fulfilled</td>
</tr>
</tbody>
</table>

To map Shopify transactional messages:

1. Go to Apps > Connector.
2. Find the Shopify connector and click Edit.
3. Click Messages.
Integrate

**Important:** If you had a completed Shopify integration before this feature was added, you need to sync the connector for the new Messages section to appear. From the connector dashboard, 'sync' the connection. You will then be prompted to authenticate to update permissions of the app as expected.

4. Configure the **General Settings**. These are the settings that will be the default for each transactional message.
   a) For **Enabled**, select **Yes** or **No**.
      Selecting **Yes** will let Bronto send the messages you have mapped. Selecting **No** will prevent your mapped messages from being sent until you choose to enable the messages.
   b) **From E-Mail**
   c) **From Name**
   d) **Sender Authentication**
      Sender authentication will sign your message with DomainKeys/DKIM (an authentication method that can optimize your message delivery to Hotmail, MSN, and Yahoo! email addresses).
   e) **Fatigue Override**
      The delivery can be sent even if it exceeds frequency cap settings for a contact. For more information on Fatigue Override, see Email Frequency Caps Override on page 286
   f) **Reply Tracking**
      Enabling Reply Tracking will store a copy of all replies to your messages on the Replies page. You may find this option convenient if you need someone other than the email address in the From line to read replies, or simply want the application to store replies. For more information on Reply Tracking, see Email Replies on page 317
   g) **Reply-To**

5. Click the **Create New Message Mapping** button.

6. For **Name**, choose a name for your message.

7. For **Bronto Message**, select the message you want to send or select **Create New Message in Bronto**.
   
   ![Note:](image) If you choose Create New Message in Bronto, a blank message will be created for you. However, you will need to find this message (Messages > Messages) and design it.
   
   Some transactional messages will populate data about the event that has triggered the message. For information on those message tags, see Shopify Message Tags on page 1214

8. For **Reply-To**, **Use Default** box is already checked. If you want to use a different Reply-To address, uncheck the box and enter the address.

9. For **Shopify Event Type**, select the Shopify event that will trigger this message.

10. Optional: Click **Advanced Options**.
    If you do not want to use the General Settings for Sender Authentication, Fatigue Override, Reply Tracking, From E-Mail, or From Name for this message, uncheck the Use Default box and enter the value you want to use.
    
    - For **Whitelist for Testing**, add the email address(es) you want to send the test message to.
      
      When you are ready to send messages to your contacts, remove the email addresses from the **Whitelist for Testing** field.

      ![Note:](image) To avoid double sending, you must contact your Shopify Merchant Success Manager (MSM) to disable any notification that the Shopify Connector will take over. MSM contact info can be found in your Shopify Plus account under **Settings > Profile**.

11. Click **Save**.

Now when Shopify triggers one of these transactional messages, the message you created and mapped in Bronto will be sent.

**Shopify Message Tags**
Tags are available for Order Confirmation, Order Canceled, and Shipping Confirmation messages. There are no special tags for Customer Account Welcome messages.
### Table 19: Billing and shipping address tags

<table>
<thead>
<tr>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%%billing_name%%%</td>
<td>The first and last names separated by a space.</td>
</tr>
<tr>
<td>%%%billing_first_name%%%</td>
<td>The first name associated with a billing address.</td>
</tr>
<tr>
<td>%%%billing_last_name%%%</td>
<td>The last name associated with the billing address.</td>
</tr>
<tr>
<td>%%%billing_phone%%%</td>
<td>The value of the billing phone field.</td>
</tr>
<tr>
<td>%%%billing_address_1%%%</td>
<td>The address1 field for a billing address.</td>
</tr>
<tr>
<td>%%%billing_address_2%%%</td>
<td>The address2 field for a billing address.</td>
</tr>
<tr>
<td>%%%billing_city%%%</td>
<td>The city associated with the billing address.</td>
</tr>
<tr>
<td>%%%billing_province_code%%%</td>
<td>The abbreviated value of Province/State.</td>
</tr>
<tr>
<td>%%%billing_province%%%</td>
<td>The full value of the Province/State field.</td>
</tr>
<tr>
<td>%%%billing_company%%%</td>
<td>The company from the customer's billing address.</td>
</tr>
<tr>
<td>%%%billing_country_code%%%</td>
<td>The value of the Country field of the address in ISO 3166-2 standard format (Example: US for United States).</td>
</tr>
<tr>
<td>%%%billing_country%%%</td>
<td>The country associated with a customer's billing address.</td>
</tr>
<tr>
<td>%%%billing_zip%%%</td>
<td>The postal/zip field of the address.</td>
</tr>
<tr>
<td>%%%shipping_name%%%</td>
<td>The first and last name fields for an address separated by a space.</td>
</tr>
<tr>
<td>%%%shipping_first_name%%%</td>
<td>The first name of the shipping address.</td>
</tr>
<tr>
<td>%%%shipping_last_name%%%</td>
<td>The last name associated with a shipping address.</td>
</tr>
<tr>
<td>%%%shipping_phone%%%</td>
<td>The value of the shipping phone field.</td>
</tr>
<tr>
<td>%%%shipping_address_1%%%</td>
<td>The address1 field for a shipping address.</td>
</tr>
<tr>
<td>%%%shipping_address_2%%%</td>
<td>The address2 field for a shipping address.</td>
</tr>
<tr>
<td>%%%shipping_city%%%</td>
<td>The city field for a shipping address.</td>
</tr>
<tr>
<td>%%%shipping_province_code%%%</td>
<td>The abbreviated value of the Province/State field of the address (Example: CA for California).</td>
</tr>
<tr>
<td>%%%shipping_company%%%</td>
<td>The company of the person associated with the shipping address.</td>
</tr>
<tr>
<td>%%%shipping_country_code%%%</td>
<td>The value of the Country field of the address in ISO 3166-2 standard format (Example: US for United States).</td>
</tr>
<tr>
<td>%%%shipping_country%%%</td>
<td>The country associated with a shipping address.</td>
</tr>
<tr>
<td>%%%shipping_zip%%%</td>
<td>The postal/zip field of the address.</td>
</tr>
</tbody>
</table>

### Table 20: Order tags

<table>
<thead>
<tr>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%%email%%%</td>
<td>The email address connected to the order.</td>
</tr>
<tr>
<td>%%%order_number%%%</td>
<td>Unique number for an order without any Shopify order prefix or suffix. e.g. 105.</td>
</tr>
<tr>
<td>Variable Tag Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>%%#order_name%%</td>
<td>The order number, including any added Shopify order prefix or suffix values. For example, #105 when the configured prefix is #.</td>
</tr>
<tr>
<td>%%#order_id%%</td>
<td>The globally unique identifier for the order. Also referred to as the API ID in Bronto.</td>
</tr>
<tr>
<td>%%#subtotal_price%%</td>
<td>Sum of the order's line-item prices after any line-item discount or cart discount has been deducted. The subtotal doesn't include taxes (unless taxes are included in the prices) or shipping costs.</td>
</tr>
<tr>
<td>%%#total_discounts%%</td>
<td>The total discounts applied at checkout.</td>
</tr>
<tr>
<td>%%#total_tax%%</td>
<td>The combined tax amount of all items in the order.</td>
</tr>
<tr>
<td>%%#total_price%%</td>
<td>Total of the order (subtotal + shipping cost - shipping discount + tax).</td>
</tr>
<tr>
<td>%%#order_status_url%%</td>
<td>The URL of the order status page.</td>
</tr>
<tr>
<td>%%#note%%</td>
<td>The note attached to an order.</td>
</tr>
<tr>
<td>%%#created_at%%</td>
<td>The date and time the order was created in ISO 8601 format (Example: 2012-03-13T16:09:54-04:00).</td>
</tr>
<tr>
<td>%%#updated_at%%</td>
<td>The time the order was last modified in ISO 8601 format (Example: 2012-08-24T14:02:15-04:00).</td>
</tr>
<tr>
<td>%%#cancelled_at%%</td>
<td>The date and time an order was marked as canceled in ISO 8601 format (Example: 2012-08-24T14:02:15-04:00). This is &quot;null&quot; when the order is active.</td>
</tr>
<tr>
<td>%%#cancel_reason%%</td>
<td>The reason an order was canceled:</td>
</tr>
<tr>
<td></td>
<td>• customer: The customer changed or canceled the order.</td>
</tr>
<tr>
<td></td>
<td>• fraud: The order was fraudulent.</td>
</tr>
<tr>
<td></td>
<td>• inventory: Items in the order were not in inventory.</td>
</tr>
<tr>
<td></td>
<td>• declined: The order was canceled because the payment has been declined.</td>
</tr>
<tr>
<td></td>
<td>• other: The order was canceled for a reason not in the list above.</td>
</tr>
<tr>
<td>%%#fulfillment_status%%</td>
<td>The fulfillment status of an order:</td>
</tr>
<tr>
<td></td>
<td>• fulfilled: Every line item in the order has been fulfilled.</td>
</tr>
<tr>
<td></td>
<td>• null: None of the line items in the order have been fulfilled.</td>
</tr>
<tr>
<td></td>
<td>• partial: At least one line item in the order has been fulfilled.</td>
</tr>
<tr>
<td></td>
<td>• restocked: Every line item in the order has been restocked and the order was canceled.</td>
</tr>
</tbody>
</table>
Variable Tag Name | Description
--- | ---
%%#financial_status%% | The payment status of the order:
• pending: The financial transaction is pending and not fully authorized.
• authorized: The transaction has been authorized.
• partially_paid: The transaction has been partially paid.
• paid: The transaction has been paid.
• partially_refunded: The transaction has been partially refunded.
• refunded: The transaction has been refunded.
• voided: The transaction has been voided.

%%#source_name%% | The origin of the order: web, pos, iphone or android.

Table 21: Customer tags

<table>
<thead>
<tr>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#customer_tax_exempt %%</td>
<td>Whether the customer needs to pay taxes (true/false).</td>
</tr>
<tr>
<td>%%#customer_updated_at%%</td>
<td>The date and time customer information was updated.</td>
</tr>
<tr>
<td>%%#customer_first_name%%</td>
<td>The first name of the customer.</td>
</tr>
<tr>
<td>%%#customer_last_name%%</td>
<td>The last name of the customer.</td>
</tr>
<tr>
<td>%%#customer_created_at%%</td>
<td>The date and time the customer records was created.</td>
</tr>
<tr>
<td>%%#customer_state%%</td>
<td>The state of a customer's account with a shop: disabled, invited or enabled.</td>
</tr>
<tr>
<td>%%#customer_note%%</td>
<td>The note associated with a customer.</td>
</tr>
<tr>
<td>%%#customer_orders_count%%</td>
<td>The total number of orders placed by a customer.</td>
</tr>
<tr>
<td>%%#customer_last_order_id%%</td>
<td>The ID of the last customer order.</td>
</tr>
<tr>
<td>%%#customer_tags%%</td>
<td>The tags (Example: Gold Club) the shop owner has attached to the customer.</td>
</tr>
<tr>
<td>%%#customer_total_spent%%</td>
<td>The total amount the customer has spend in their shopping history.</td>
</tr>
<tr>
<td>%%#customer_id%%</td>
<td>The API ID for the customer.</td>
</tr>
</tbody>
</table>

The following **API Loop Tags** can be used to show information about the line items in an order. Some attributes of a line item such as productURL and imageURL are not available directly in API loop tags but you can obtain these from your product data. If you have enabled and configured the Product Import module of your Shopify Connector, you can pull product URLs or image URLs from the catalog in order to use them in order-related transactional messages. For more information, see **Product Tags**.

In the example below, you can see how to use an API Loop to show what line items are in an order while mixing API tag and product tags.

```{dynamic_code}
{loop}
{line_item_variant_title}
{line_item_variant_id}
```
Table 22: Line-item loop tags

<table>
<thead>
<tr>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#line_item_id_%%</td>
<td>The unique identifier for the item.</td>
</tr>
<tr>
<td>%%#line_item_variant_id_%%</td>
<td>The unique identifier for the variant of the item.</td>
</tr>
<tr>
<td>%%#line_item_variant_title_%%</td>
<td>The product variant line item's title.</td>
</tr>
<tr>
<td>%%#line_item_title_%%</td>
<td>The line item product's title.</td>
</tr>
<tr>
<td>%%#line_item_price_%%</td>
<td>The price of a single item.</td>
</tr>
<tr>
<td>%%#line_item_quantity_%%</td>
<td>The quantity of a single item.</td>
</tr>
<tr>
<td>%%#line_item_gift_card_%%</td>
<td>Whether the line_item is a gift card: true or false.</td>
</tr>
</tbody>
</table>

There are loop tags related to Shopify orders that can render information other than line items.

Table 23: Miscellaneous loop tags

<table>
<thead>
<tr>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#tax_lines_title_%%</td>
<td>The name of the tax (Example: GST).</td>
</tr>
<tr>
<td>%%#tax_line_price_%%</td>
<td>The tax amount (Example: 2).</td>
</tr>
<tr>
<td>%%#tax_line_rate_%%</td>
<td>The tax rate as a decimal (Example .05 for 5 percent).</td>
</tr>
<tr>
<td>%%#discount_code_%%</td>
<td>A case-insensitive discount code used by the customer.</td>
</tr>
<tr>
<td>%%#discount_code_amount_%%</td>
<td>The amount of the discount (Example: $25).</td>
</tr>
<tr>
<td>%%#ship_lines_title_%%</td>
<td>The title of the shipping method (Example: Standard Shipping).</td>
</tr>
<tr>
<td>%%#ship_lines_price_%%</td>
<td>The original price of the shipping price before any discounts were applied (Example: $5).</td>
</tr>
<tr>
<td>%%#payment_gateway_names_%%</td>
<td>A list of unique payment providers on an order. For example, if someone paid with a Visa, a Mastercard, and cash, the returned list would be &quot;shopify_payments, cash&quot;.</td>
</tr>
<tr>
<td>%%#tags_%%</td>
<td>A list of all of the tags associated with an order in alphabetical order.</td>
</tr>
</tbody>
</table>

Import Shopify Historical Data

The Shopify Connector starts importing contact and/or order data from when the connector is enabled, but sometimes you may want to import Shopify data that is older than this.

You can use the Historical Imports section on the Advanced tab to import older data into Bronto.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Advanced**.
4. Scroll to the **Historical Import** section.
5. Select whether you want to import **Contact** or **Order** data from the **Type** list.
6. If you want to import all records since a particular contact or order, enter the unique ID in the **Since ID** box.
7. If you want to import contacts/orders based on creation date:
   a) Click in the **Created After** box and enter or select a date.
   b) Click in the **Created Before** box and enter or select a date.
8. If you want to import contacts/orders based on the last updated date:
   a) Click in the **Updated After** box and enter or select a date.
   b) Click in the **Updated Before** box and enter or select a date.
9. Click Execute to start the import.

After the import completes, go to the **Execution Results** page and click **View Results** to see the details of the import. Some of the records in this table might be marked as **Skipped**, which means they were not imported. A historical import uses the same import validation rules as a normal import but, depending on what you have configured in Connector, might handle a number of different types of transformations. This means a historical import might attempt to import more events than just the order itself, which causes these records/events to be skipped. Reasons a record might be skipped include:

- Coupon are scanned to import redemptions. When there are no redemptions the transform is skipped.
- Order must meet import / delete state. When an order is "out of state" the transform is skipped.
- Metafields are gleaned. When an order doesn't have metafields, or the metafields aren't mapped the transform is skipped.

**Magento Connector**

The Magento Connector provides an integration between your Bronto and Magento accounts so that Magento data can be imported and used in Bronto.

Using the connector creates a seamless customer experience where data from your Magento storefront can be used to create highly-targeted marketing campaigns that drive customer engagement and increase revenue. The connector can be used for:

- Contact management. Import your Magento contact data into Bronto so you can use Bronto for marketing and metrics.
- Order and product data management. Import order and product data from your Magento storefront into Bronto so you can use this data in your messages and to create/trigger marketing campaigns.
- Message campaign configuration. Configure Bronto to send messages to contacts based on contact and order information from Magento.
- Recommendation and coupon configuration. Build cart abandonment rules and coupon generators that can be used in messages sent using the connector.
- App integrations. Use the connector to pass Magento storefront data to Browse Recovery, Cart Recovery, Pop-up Manager, or Coupon Manager.

The Magento Connector can only be used with Magento M2. If you want to connect a Magento M1 instance with Bronto, use the **Magento Extension version 2.4.4**.

The installation steps are different depending on your Magento version but once set up the configuration options within the connector are the same. For instructions on how to set up the connector with M1 see **Set Up An M1 Magento Connection** and for M2 see **Install And Register An M2 Magento Connection** on page 1220.

**Related Topics**

Magento Extension version 2.4.4
Install And Register An M2 Magento Connection

If you use Magento version M2, follow these steps to connect your Magento account to your Bronto account.

Note: See Update An M2 Magento Connector 3.0 Or Lower on page 1221 or Update An M2 Magento Connector 3.1 Or Later on page 1222 if you have already set up an M2 Magento connection to Bronto and need to upgrade it.

Unlike Bronto's other connectors, the majority of the initial Magento Connector configuration steps must be done to configuration files outside of Bronto and in Magento. Bronto will attempt to keep the instructions current, but if there was a recent change to Magento it may not be reflected in our help topics yet.

If you run into an issue where you cannot establish a connection between Magento and Bronto's Magento Connector it's possible that Magento's firewall is preventing the connector from being properly registered. To fix this, in Magento you will need to either:

- Whitelist the Elastic IP 52.205.120.161.
- Remove the firewall on your Magento server. The site will remain safe by way of secure log in credentials.

The Magento Connector can only be used with Magento M2. If you want to connect a Magento M1 instance with Bronto, use the Magento Extension version 2.5.

1. Open the base Magento composer.json file in a code editor.
2. Add the following to the base Magento composer.json file, depending on the repository's format:
   - Array format:
     ```json
     "repositories": [  
         {  
           "type": "composer",  
           "url": "https://cdn.bronto.com/magento"  
         }  
     ]
     ```
   - JSON Object format:
     ```json
     "repositories": {  
         "bronto": {  
           "type": "composer",  
           "url": "https://cdn.bronto.com/magento"  
         }  
     }
     ```
3. Run `composer require bronto/magento-module-all`
4. Run `./bin/magento module:enable Bronto_Browse Bronto_Cart Bronto_Connector Bronto_Contact Bronto_Coupon Bronto_Email Bronto_Integration Bronto_Inventory Bronto_Magento Bronto_Notification Bronto_Optin Bronto_Order Bronto_Product Bronto_Rating Bronto_Redemption`
5. Run `./bin/magento setup:upgrade`
6. Run `./bin/magento setup:di:compile`
7. Go to Apps > Connector.
8. Click Add Connection.
9. Click Magento.
10. Copy the Account ID.
11. In Magento, go to System > Other Settings > Bronto Connector.
12. Click on Add Registration.
13. Provide the relevant information on the Registration page, including the Account ID acquired from the Bronto, then click Save.
You should now be able to see the registration information in Magento and see a configured Magento Connector on Bronto's Connector page. Complete the connector configuration by completing the steps in the other Magento Connector topics provided.

**Update An M2 Magento Connector 3.0 Or Lower**

If you have already set up a connection with Magento version M2, follow these steps to update your connection.

You need to find out which version of the Magento Connector you are using.

1. Log in to Bronto.
2. Go to Apps > Connector
3. Find your Magento Connector.
4. Under Integration, you will find the version of the connector you are using.

   **Note:** If your version is 3.0 or lower, continue with the following steps. If your version 3.1 or later, see Update An M2 Magento Connector 3.1 Or Later on page 1222

These steps cannot be used to configure a new connection or to upgrade to an M2 connector from any other previous version of Magento.

If your version is 3.0 or lower:

1. Remove any unnecessary requirement.

   ```
   composer remove bronto/php-common-helper
   
   **Note:** This requirement may not exist on your system. If it does not exist, you will see this message: Nothing to install or update.
   ```

2. Remove outdate modules.

   ```
   composer remove bronto/magento-module-all
   ```

3. Clear the cached version of the Connector code.

   ```
   composer clear-cache
   ```

4. Reinstall modules using the correct version constraint.

   ```
   composer require bronto/magento-module-all:^3
   ```

5. Clear Magento's cache and any previously compiled code.

   ```
   bin/magento setup:upgrade
   ```

6. Recompile the code.

   ```
   bin/magento setup:di:compile
   
   **Note:** If you are instructed to clear a directory before compiling, follow the on-screen instructions, and then retry this step.
   ```

7. In Magento, go to System > Other Settings > Bronto Connector
   a) Under Actions, click Sync Settings.

8. Sync the Bronto Connector with the new code.
   a) Log in to Bronto.
   b) Go to Apps > Connector
   c) Find your Magento Connector.
   d) Click the Sync icon.
Update An M2 Magento Connector 3.1 Or Later

If you have already set up a connection with Magento version M2, follow these steps to update your connection.

You need to find out which version of the Magento Connector you are using.

1. Log in to Bronto.
2. Go to Apps > Connector
3. Find your Magento Connector.
4. Under Integration, you will find the version of the connector you are using.

Note: If your version is 3.1 or later, continue with the following steps. If your version lower than 3.1, see Update An M2 Magento Connector 3.0 Or Lower on page 1221

These steps cannot be used to configure a new connection or to upgrade to an M2 connector from any other previous version of Magento.

If your version is 3.1 or later:

1. Update the connector code.
   
   composer update bronto/magento-module-all --with-dependencies

2. Clear the cache and any previously compiled code.

   php bin/magento setup:upgrade

3. Recompile the code.

   php bin/magento setup:di:compile

4. Sync the Bronto Connector with the new code.
   
   a) Log in to Bronto.
   
   b) Go to Apps > Connector
   
   c) Find your Magento Connector.
   
   d) Click the Sync icon.

   Note: If you experience issues getting updated to the latest version you might need to reinstall the Connector by running

   composer remove bronto/magento-module-all

followed by

   composer require bronto/magento-module-all

Configure Magento Connector Contacts

The Magento Connector can be configured to import contact data from Magento into Bronto.

Once configured, this will import a contact's email and any contact fields you have mapped. You can also use Sync Guest Order Fields to import the billing or shipping address for customers who have purchased something but have not opted-in to receiving marketing messages.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Contacts.
4. Set Enabled to Yes.
5. Select whether you want to sync a mapped attribute when it is empty:
   
   • Yes will skip importing empty attributes.
• **No** will import empty attributes and overwrite existing data in Bronto.

6. Use the **Sync Guest Order Fields** to indicate which fields, if any, you want to import for customers who place orders but are not registered Magento contacts.

Bronto can only send these customers transactional messages because they have not opted-in to email marketing from you.

   Note: Mapping a field in Attributes, Shipping Address Attributes and Billing Address Attributes to the same Bronto field will result in multiple updates to that field. The order of operation for the update are Shipping first, Billing second and Attributes last. So, the information in the Attributes field will be the one that is used.

7. Map the Magento contact attributes to Bronto contact fields by selecting the contact field from the list for each attribute.

   Only map the attributes you want to import. To create a new Bronto contact field, select **Create New Field in Bronto** and use the dialog box to create the new field. As you map the fields, make sure the format for the Bronto contact fields you select match the Magento contact attribute data type. For example, if the Magento attribute is a date, you need to map it to a date-based contact field.

   Note: Field names have a 25 character limit.

8. When you have finished configuration for all of the import settings on the **Contacts** page, click **Save Changes**.

**Configure Magento Connector Opt-Ins**

You can use the Magento Connector opt-in settings to exchange contact status information between Bronto and Magento and to provide Bronto opt-in options on your Magento site.

Opt-Ins is divided into three sections:

• **Settings** passes newsletter subscription information in order to give subscribed contacts active status in Bronto. This can also pass a Bronto unsubscribed status to Magento and add opt-ins or opt-outs to lists.

• **Checkout** adds a configurable opt-in to marketing checkbox to the checkout page of your Magento site.

• **Embedded Webform** adds a managed preferences webform to the newsletter subscriptions area of your Magento site.

1. Go to **Apps > Connector**.

2. Locate the connector you want to work with and click its **Edit** link.

3. Click **Opt-Ins**.

4. Set **Enabled** to **Yes**.

   This will give contacts who have subscribed to your Magento newsletter active status.

5. To sync an unsubscribed Bronto contact status back to Magento, set **Sync Bronto Unsubscribes** to **Yes**.

   This will help to keep you from marketing to contacts that have indicated they do not want to receive marketing messages from your company.

6. Optional: To add Magento newsletter subscribers to Bronto list(s) click in the **Add Opt-Ins to Lists** box and click on the list name.

   If you want to add subscribers to more than one list, repeat this step. You can remove a list by clicking the X on the list label. You can add subscribers to a new list by selecting **Create New List In Bronto** and creating the list.

7. Optional: To remove contacts who have unsubscribed in Magento from Bronto list(s) click in the **Remove Opt-Outs from Lists** box and click on the list name.

   If you want to remove contacts from more than one list, repeat this step. You can remove a list by clicking the X on the list label.

8. To add a newsletter subscription checkbox on your store's checkout page:

   a) In the **Checkout** section, set **Enabled** to **Yes**.

   b) Optional: Select a list to add contacts who select the box to from **Add Opt-Ins to Source List**.

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c) Enter the text you want to be displayed with the checkbox in the Checkbox Label box.
d) Select where you want the checkbox to appear from the Checkbox Location list.
e) If you want the checkbox to be selected by default, select Yes from the Checked by Default list.

Note: This only works for default Magento checkout templates. If you want additional styling for the checkbox, it can be applied in your Magento template CSS.

9. If you want to embed a Bronto managed preferences webform in the Newsletter Subscriptions area on your Magento account page:

Note: This will not work for sites that use https for account management pages and a private domain configured in Bronto. Webforms hosted at app.bronto.com, without a private domain, can be changed to https to work around this limitation.

a) In the Webform section, set Enabled to Yes.
b) Enter your webform shared secret in the Shared Secret box.
   You can find the webform shared secret for your account by going to Home > Settings > Data Exchange and scrolling to the bottom of the page.
c) Enter the webform subscriber lookup URL in the Subscriber Lookup box.
   To find this, go to Content > Webforms, click the preview icon for the Manage Preferences webform you want to embed, and scroll to the bottom of the webform preview. Copy the URL exactly as it is displayed in the Subscriber Lookup For This Webform area, including "{CONTACT}/{VALIDATION_HASH}".
d) If desired, adjust the Form Height.

10. When you have finished configuration for all of the settings on the Opt-Ins page, click Save Changes.

Configure Magento Connector Orders

When you have the Magento Connector configured it can be used to import your Magento order data into Bronto. Once your order data is in Bronto you can use it to send transactional or marketing messages to contacts. If you import orders with a processed status, you can also view RFM metrics related to your orders.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Orders.
4. Set Enabled to Yes.
5. Select whether you want imported orders to have a Pending or Processed status in the Bronto Order Status list.
   This option is only available if your account uses order service. Bringing orders in as Processed will include the order totals in the RFM metrics and trigger any active workflows that begin with the Order Is Added trigger node. If set to Pending the RFM metrics will not be calculated for these orders until they are marked as Processed.
6. Select the Magento order statuses you want used to determine that an order should be imported from the Orders to Import list.
   An order status can be removed from the list by clicking the X icon on a status.
   If you have custom order statuses, make sure they are assigned to a default Magento order state in Magento.
7. Select the Magento order statuses you want used to determine that an order should be removed from Bronto from the Orders to Delete list.
   You might want to remove an order from Bronto in order to clear up your RFM metrics. An order status can be removed from the list by clicking the X icon on a status.
8. Select the Magento price type you want to use from the Product Price list.
   Bronto only stores one price, you must select which you want to use in Bronto. You might want to select Base if you are primarily interested in RFM metrics or use Display if you are primarily interested in using this field for marketing.
9. Select whether you want to import the Magento **Description** or the **Short Description** from the **Product Description** list.

   Bronto only stores one description field so you must select which one you want to use in Bronto.

10. Select which Magento image type you want to import as your image from the **Image View Type** list.

   **Base Image** is the default and recommended setting because this can be resized in the Bronto Message editing tools.

11. If you want to map a Magento line item attribute to Bronto's **Other** order field, select the line item type from the **Other Field** list.

   Additional product attributes can be imported with the Products import module, but cannot be used in Bronto for segmentation.

12. When you have finished configuration for all of the import settings on the **Orders** page, click **Save Changes**.

**Configure Magento Connector Products**

When you have the Magento Connector configured it can be used to import your Magento product data into the Bronto product catalog.

If you decide to use Magento to keep your product catalog up-to-date and have previously manually imported your product catalog, the product import settings on the Products page are disabled when the Magento Connector starts managing product data. This will prevent data conflicts from occurring.

While Magento has the concept of nested subcategories, Bronto stores all category information for a product in a single field. Therefore, you will need to carefully configure several category-related options in order to appropriately import category and subcategory data. First, you should decide whether you want to import all of the category details for a product, or only import one category level. If you decide you want to import the entire tree, map **product_category** to **Product Category Tree**. Next you need to configure multiple category settings in order to define how you want the category data managed. In Bronto, the lowest subcategory is always considered a leaf and the categories and subcategories above it are branches. You will need to configure a delimiter used to separate leaves and branches and identify which category level you want to import, or start, your tree at. Finally, you will need to define a tie breaker that can be used to define which category to use in Bronto when a product belongs to multiple subcategories.

This module comes with default settings that will work correctly without significant additional configuration for most users.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Products**.
4. Select whether you want to import the categories and subcategories by **Name** or **URL Key**.

   The **URL Key** is the shortened name for a Magento category. You can see what both of these look like in your Magento account.

5. Select the type of delimiter you want to use for a leaf from the **Category Leaf Delimiter** list.
6. Select the type of delimiter you want to use for a branch from the **Category Branch Delimiter** list.

   Using a different delimiter for leaves and branches will help you quickly visually identify which a category item is for a product in your Bronto catalog.

7. Select which level you want to start the category import at from the **Category Level** list.

   As you make your selection, carefully consider how you plan to use a product's category field. For example, if you want to use the product search feature to compare sales for all products in a category, make sure to import data at that category level.

8. Select the **Category Level Tiebreaker**.

   In Magento a product can be added to multiple categories and subcategories, but can only be in one category in Bronto. When a product is in more than one Magento category or subcategory, the **Category Level Tiebreaker** is used to pick which category the product is assigned in Bronto.
9. Under **Scopes**, select **Yes** for **Magento Store Scopes**.

10. Map the relevant Bronto product fields provided in the **Default Fields** section to Magento product attributes by selecting the Magento attribute from the list.

    The following fields have already been mapped for you:

    - `product_id` to `SKU`
    - `parent_product_id` to `Parent ID`
    - `product_category` to `Category`
    - `price` to `Price`
    - `sale_price` to `Special Price`
    - `product_url` to `URL`
    - `image_url` to `Base Image`
    - `title` to `Name`
    - `description` to `description`
    - `Sale_Price_Effective_Start_Date` to `Special Price From Date`
    - `Sale_Price_Effective_End_Date` to `Special Price To Date`
    - `quantity` to `Inventory Quantity`
    - `availability` to `Stock Availability`
    - `average_rating` to `Avg. Review Rating`
    - `review_count` to `Number of Reviews`

    But, if necessary, you can change any of these default mappings.

11. To map product data that does not fall into a default field:
    
    a) Click **Create New Mapping**.
    
    b) Enter the name for the Bronto product field in the **Name** box.
    
    c) Select the Magento product attribute from the **Product Attribute** list.
    
    d) Click **Save**.

12. Set **Enabled** to **Yes**.

    Once this is enabled, the import of the mapped product fields begins automatically so make sure you have everything properly configured before you move on the next step.

13. Click **Save Changes** to enable the product import.

    ![Note: If you need to reimport your product catalog manually, use Sync Product Catalog Fields and Add to Import Queue under Advanced.]

**Configure Magento Connector Messaging**

You can use the Magento Connector to send different types of messages based on various configuration rules.

This topic covers the global settings on the **Messages** tab, which are the global sender options for all messages sent using the connector. You can override any of these options by setting them at the message send type or message send level. For details on how to configure a message send type, see the topic relevant to the type of message you want to send:

- **System Messages** send messages from Bronto that would normally be sent by Magento, such as transactional messages.
- **Carts Messages** send shopping cart reminder messages.
- **Wishlist Messages** send wishlist reminder messages.
- **Reviews Messages** send messages that request reviews of recently purchased items.
- **Reorders Messages** send messages that remind a contact to reorder previously purchased products.
- **Care Tips Messages** send messages that provide additional care tips for purchased items.

1. Go to **Apps > Connector**.

2. Locate the connector you want to work with and click its **Edit** link.
3. Click Messages.
4. Select whether you want to enable Sender Authentication.

   We do not recommend disabling sender authentication. Sender authentication will sign your email message with DomainKeys/DKIM. DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email. This digital signature is verified by the receiving mail server to ensure that the email is not forged.
5. Select whether you want to enable Fatigue Override.

   Setting this to Yes will send email to a contact even when it would exceed the email frequency cap you designated for your contacts.
6. Select whether you want to configure Reply Tracking.

   Enabling Reply Tracking will store a copy of all email replies to your email messages on the Email Replies page. You may find this option convenient if you need someone other than the email address in the From Email Address line to read email replies, or simply want the application to store email replies.
7. Enter the email address you want to use for replies in the Reply To box.
8. Select whether you want to display a symbol when currency is used in your messages from the Display Currency Symbol list.
9. Click Save Changes to save all of the message configuration changes you have made.
10. Complete the following tasks to configure different types of message sends:

    - System Message Sends
    - Carts Message Sends
    - Wishlist Message Sends
    - Reviews Message Sends
    - Reorders Message Sends
    - Care Tips Message Sends

Configure Magento Connector System Messages

The Magento Connector can be configured to send messages from Bronto that would normally be sent by Magento. This allows you to leverage the message design capabilities of Bronto to send sophisticated messages that can be triggered by Magento template rules.

   Note: Typically, system messages are used for transactional emails.

Magento templates are not automatically imported into Bronto; they must be manually imported in order to be used. After you have configured Magento system messages in Bronto, you can import the template HTML messages from Magento. These templates include dynamic tags for standard Magento variables that can be used to build messages in Bronto. If you plan on doing this, go to the Advanced tab and run Add or Update All Mapped System Messages in the Schedule Task area.

   Important: You must configure your system messages before you can run Add or Update All Mapped System Messages. Running Add or Update All Mapped System Messages will overwrite all mapped message rules in Bronto with the content from the templates in Magento. If you have already imported and updated Magento message templates in Bronto, it's best to use Test Import on the Advanced page to import additional Magento templates.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Messages.
4. If you haven't already, configure your default sender options.

5. Click on the System tab to configure system message sending.
6. Set Enabled to Yes.

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7. If you have Magento configured to send a copy of messages to an internal address, select which platform you want to use to send these messages from the **Sales Email Copy Send Type** list.

   If you do not have email copies configured in Magento then this setting will not be used.

8. Optional: Click **Advanced options** and configure sending options if you do want to use sending options that are different from the default.

9. Click **Create New Message** to create a new sending rule.

10. Enter a name for the rule in the **Name** box.

11. Select the Magento template you want to use to trigger this rule from the **Message Type** list.

   If you select **Magento** for **Send Type**, then Magento will send the message associated with this template. Otherwise, the Bronto **Message** selected is sent using the information from the selected **Message Type** template. You can add a new template, view the rules for a template, or edit any of these templates from your Magento account. However, once you associate a Magento template with a Magento Connector send you cannot edit the template in Magento anymore. This is to prevent undesired changes to messages that are in use. For more information about how to do this, please refer to Magento documentation.

12. Select how you want the message to be sent from the **Send Type** list:

   • **Magento**: Will use Magento to send the message. You will select the message to be sent in Magento by associating it with the Magento template you selected for **Message Type**.

   • **Do Not Send**: Will not send a message. For example, you might want to use this to disable the Newsletter Subscription Success template that is normally sent from Magento so that you can use a Bronto welcome message workflow instead.

   • **Transactional**: Will send a transactional email from Bronto. You will need to select the message from the **Message** list or if you want to use a Magento template to build a new message select it from the **Template** list.

   • **Marketing**: Will send a marketing email from Bronto. You will need to select the message from the **Message** list or if you want to use a Magento template to build a new message select it from the **Template** list.

13. If you selected **Transactional** or **Marketing** from the **Send Type** list:

   • **Optional**: If you want to apply a Magento message template to a message, select it from the **Template** list.

   • Select a message to send from the **Message** list.

      This is a list of Bronto messages. Remember, the message content should match the selected **Send Type**. For example, do not select a marketing message for a transactional send.

14. To set sender options specific to this rule:

   a) Click **Advanced options**.

   b) Configure any of the listed sending options if you do not want to use the default sending options you configured above.

15. Optional: To use a coupon with your message:

   Before you use coupons within your messages you need to use the **Coupons** tab to enable Magento Connector to manage/generate coupons. For more information see **Configure Magento Connector Coupons** on page 1250.

   a) Click **Advanced options**.

   b) To use an already generated coupon:

      1. Select **Specific Coupon** from the **Coupon Type** list.
      2. Click **Select**.
      3. Click on the coupon you want to use.

      If you do not see a coupon, you need to use the **Coupons** tab to configure Magento Connector coupons.

      4. Click **Confirm**.

   c) To generate a coupon:

      This will generate the coupon when the email is sent and send the coupon details to Magento.

      1. Select **Generator** from the **Coupon Type** list.
      2. Select the generator you want to use from the **Coupon Generator** list.
If you do not see a generator, you need to use the Coupons tab to configure Magento Connector coupons. Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%. For more information about API tags see API Message Tags on page 160.

16. When you have finished configuring all of the Create New Message options click Save.

17. Click Save Changes to save all of the message configuration changes you have made.

If you move to a different message type without clicking Save Changes your changes will not be lost. However, it is a best practice to click Save Changes after you complete a large chunk of work so it isn't lost if the system logs you out due to inactivity.

Note: Bronto will only create a new blank message in Bronto on mapping save. To import Magento message content, use Add or Update All Mapped System Messages or Test Import on the Advanced page.

Magento System Message Variables
You can add email variable tags to the Magento system messages.

API message tags are user defined tags that allow you to insert HTML content into the body and subject line of messages using the API. The content you add via API message tags will be added to the message at send time. These tags are used to sync content from your system (order id, address, etc.) with messages you send in the application.

Note: These tags are only available if the variable placeholder exists in the Magento message template and that template has been imported into Bronto.

Table 24: System messages and their available email variable tags

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<th>System Message</th>
<th>Variable Tag Name</th>
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</tr>
<tr>
<td></td>
<td>%%#storeName2%%</td>
</tr>
<tr>
<td></td>
<td>%%#storeName3%%</td>
</tr>
<tr>
<td>Send Product Link to Friend</td>
<td>%%#dependsMessage%%</td>
</tr>
<tr>
<td></td>
<td>%%#name%%</td>
</tr>
<tr>
<td></td>
<td>%%#name2%%</td>
</tr>
<tr>
<td></td>
<td>%%#productUrl%%</td>
</tr>
<tr>
<td></td>
<td>%%#productName%%</td>
</tr>
<tr>
<td></td>
<td>%%#senderName%%</td>
</tr>
<tr>
<td>Shipment Update</td>
<td>%%#accountUrl%%</td>
</tr>
<tr>
<td></td>
<td>%%#dependsComment%%</td>
</tr>
<tr>
<td></td>
<td>%%#dependsStoreHours%%</td>
</tr>
<tr>
<td></td>
<td>%%#dependsStorePhone%%</td>
</tr>
<tr>
<td></td>
<td>%%#name%%</td>
</tr>
<tr>
<td></td>
<td>%%#incrementId%%</td>
</tr>
<tr>
<td></td>
<td>%%#orderStatus%%</td>
</tr>
<tr>
<td></td>
<td>%%#storeEmail%%</td>
</tr>
<tr>
<td>System Message</td>
<td>Variable Tag Name</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Shipment Update for Guest</td>
<td>%%%#accountUrl%%</td>
</tr>
<tr>
<td></td>
<td>%%%#dependsComment%%</td>
</tr>
<tr>
<td></td>
<td>%%%#dependsStoreHours%%</td>
</tr>
<tr>
<td></td>
<td>%%%#dependsStorePhone%%</td>
</tr>
<tr>
<td></td>
<td>%%%#name%%</td>
</tr>
<tr>
<td></td>
<td>%%%#incrementId%%</td>
</tr>
<tr>
<td></td>
<td>%%%#orderStatus%%</td>
</tr>
<tr>
<td></td>
<td>%%%#storeEmail%%</td>
</tr>
<tr>
<td></td>
<td>%%%#storeName%%</td>
</tr>
<tr>
<td>Stock Alert</td>
<td>%%%#alertGrid%%</td>
</tr>
<tr>
<td></td>
<td>%%%#name%%</td>
</tr>
<tr>
<td>Subscription Confirmation</td>
<td>%%%#subscriberConfirmationLi%%</td>
</tr>
<tr>
<td></td>
<td>%%%#subscriberConfirmationLi2%%</td>
</tr>
<tr>
<td>Subscription Success</td>
<td>N/A</td>
</tr>
<tr>
<td>Unsubscription Success</td>
<td>N/A</td>
</tr>
<tr>
<td>User Notification</td>
<td>%%%#changes%%</td>
</tr>
<tr>
<td></td>
<td>%%%#changes2%%</td>
</tr>
<tr>
<td></td>
<td>%%%#dependsComment%%</td>
</tr>
<tr>
<td></td>
<td>%%%#dependsStorePhone%%</td>
</tr>
<tr>
<td></td>
<td>%%%#storeEmail%%</td>
</tr>
<tr>
<td></td>
<td>%%%#storeFrontendName%%</td>
</tr>
<tr>
<td></td>
<td>%%%#StoreName%%</td>
</tr>
<tr>
<td></td>
<td>%%%#userName%%</td>
</tr>
<tr>
<td>Wish List Sharing</td>
<td>%%%#customerName%%</td>
</tr>
<tr>
<td></td>
<td>%%%#customerName2%%</td>
</tr>
<tr>
<td></td>
<td>%%%#dependsMessage%%</td>
</tr>
<tr>
<td></td>
<td>%%%#items%%</td>
</tr>
<tr>
<td></td>
<td>%%%#storeName%%</td>
</tr>
<tr>
<td></td>
<td>%%%#viewOnSiteLink%%</td>
</tr>
<tr>
<td>System Message</td>
<td>Variable Tag Name</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>Predefined Variables</td>
<td>%%%#subtotal%%</td>
</tr>
<tr>
<td></td>
<td>%%%#shippingAmt%%</td>
</tr>
<tr>
<td></td>
<td>%%%#discount%%</td>
</tr>
<tr>
<td></td>
<td>%%%#tax%%</td>
</tr>
<tr>
<td></td>
<td>%%%#grandTotal%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productId_&lt;index&gt;%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productName_&lt;index&gt;%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productSku_&lt;index&gt;%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productPrice_&lt;index&gt;%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productTotal_&lt;index&gt;%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productQty_&lt;index&gt;%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productUrl_&lt;index&gt;%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productDescription_&lt;index&gt;%%</td>
</tr>
</tbody>
</table>

Table 25: Predefined Variables

These variables are provided by the Magento Connector Extension and do not need to be defined in the template and imported into Bronto.

<table>
<thead>
<tr>
<th>System Message</th>
<th>Variable Tag Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Credit Memo Update</td>
<td>%%%#subtotal%%</td>
</tr>
<tr>
<td>• Credit Memo Update for Guest</td>
<td>%%%#shippingAmt%%</td>
</tr>
<tr>
<td>• Invoice Update</td>
<td>%%%#discount%%</td>
</tr>
<tr>
<td>• Invoice Update for Guest</td>
<td>%%%#tax%%</td>
</tr>
<tr>
<td>• New Credit Memo</td>
<td>%%%#grandTotal%%</td>
</tr>
<tr>
<td>• New Credit Memo for Guest</td>
<td>%%%#productId_&lt;index&gt;%%</td>
</tr>
<tr>
<td>• New Invoice</td>
<td>%%%#productName_&lt;index&gt;%%</td>
</tr>
<tr>
<td>• New Invoice for Guest</td>
<td>%%%#productSku_&lt;index&gt;%%</td>
</tr>
<tr>
<td>• New Order</td>
<td>%%%#productPrice_&lt;index&gt;%%</td>
</tr>
<tr>
<td>• New Order for Guest</td>
<td>%%%#productTotal_&lt;index&gt;%%</td>
</tr>
<tr>
<td>• New Shipment</td>
<td>%%%#productQty_&lt;index&gt;%%</td>
</tr>
<tr>
<td>• New Shipment for Guest</td>
<td>%%%#productUrl_&lt;index&gt;%%</td>
</tr>
<tr>
<td>• Order Update</td>
<td>%%%#productDescription_&lt;index&gt;%%</td>
</tr>
</tbody>
</table>

Configure Magento Connector Cart Messages

Magento Connector can be configured to use information about cart activity from your store to send shopping cart reminder messages.
Cart message sending can send up to three different messages. You can configure different abandonment settings for each message and can use the following in API tags in your cart messages:

<table>
<thead>
<tr>
<th>API Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>subtotal</td>
<td>Subtotal for the cart.</td>
</tr>
<tr>
<td>subtotalExclTax</td>
<td>Subtotal for the cart without tax.</td>
</tr>
<tr>
<td>subtotalInclTax</td>
<td>Subtotal for the cart with tax.</td>
</tr>
<tr>
<td>grandTotal</td>
<td>The combined total prices for all items in an order, minus discounts, plus tax and shipping costs.</td>
</tr>
<tr>
<td>quoteURL</td>
<td>Cart redirect link.</td>
</tr>
<tr>
<td>productId_#</td>
<td>Unique identifier for the product.</td>
</tr>
<tr>
<td>productName_#</td>
<td>Name of the product.</td>
</tr>
<tr>
<td>productSku_#</td>
<td>SKU number for the product.</td>
</tr>
<tr>
<td>productImgUrl_#</td>
<td>URL for the main image for the product.</td>
</tr>
<tr>
<td>productUrl_#</td>
<td>URL representing the product page on the storefront.</td>
</tr>
<tr>
<td>productQty_#</td>
<td>Number ordered.</td>
</tr>
<tr>
<td>productDescription_#</td>
<td>Description of the product.</td>
</tr>
<tr>
<td>productPrice_#</td>
<td>Line item price.</td>
</tr>
<tr>
<td>productPriceExclTax_#</td>
<td>Line item price excluding tax.</td>
</tr>
<tr>
<td>productPriceInclTax_#</td>
<td>Line item price including tax.</td>
</tr>
<tr>
<td>productTotal_#</td>
<td>Line item row total.</td>
</tr>
<tr>
<td>productTotalExclTax_#</td>
<td>Line item row total excluding tax.</td>
</tr>
<tr>
<td>productTotalInclTax_#</td>
<td>Line item row total including tax.</td>
</tr>
</tbody>
</table>

For more information about API tags see API Message Tags on page 160.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Messages.
4. If you haven't already, configure your default sender options.
5. Click on the Carts tab to configure cart message sending.
6. Set Enabled to Yes.
7. If you want to specify a specific Magento email sender select the sender from the Email Sender list.
   If you do not see the sender you want to use, configure a new sender in Magento.
8. Select the Magento customer group you want to target from the Customer Group list.
   You can select multiple customer groups. Only members of these groups will be considered for the send.
9. Select any Bronto lists of contacts you want to be excluded from this send from Exclusion Lists.
   You can select multiple Bronto lists. Any contacts that are on an exclusion list will not be considered for the send.
10. Click Advanced options and configure sending options if you do want to use sending options that are different from the default.
11. Under Message 1, set Enabled to Yes.
12. Select the Bronto message you want to send from the Message list.

13. Use Abandon Units and Abandon Period to configure your cart abandonment settings.

   The combination of these two settings determine the amount of inactive time that has to pass before a cart is considered to be abandoned. For example, if you set Abandon Period to 3 and Abandon Units to Hours, then any cart on your site that has had more than 3 hours of inactivity is considered for a send. However, the contact who abandoned the cart must still meet the Cart message rules you configured in order to be sent the message.

14. Select whether the message is a Marketing or Transactional message from the Send Type list.

   Remember, the message content should match the selected Send Type. For example, do not select a marketing message for a transactional send.

15. Click Advanced options and configure sending options if you do want to use sending options that are different from the default.

16. Optional: To use a coupon with your message:

   Before you use coupons within your messages you need to use the Coupons tab to enable Magento Connector to manage/generate coupons. For more information see Configure Magento Connector Coupons on page 1250.

   a) Click Advanced options.

   b) To use an already generated coupon:

      1. Select Specific Coupon from the Coupon Type list.
      2. Click Select.
      3. Click on the coupon you want to use.
      
         If you do not see a coupon, you need to use the Coupons tab to configure Magento Connector coupons.

      4. Click Confirm.

   c) To generate a coupon:

      This will generate the coupon when the email is sent and send the coupon details to Magento.

      1. Select Generator from the Coupon Type list.
      2. Select the generator you want to use from the Coupon Generator list.

         If you do not see a generator, you need to use the Coupons tab to configure Magento Connector coupons.

         Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%. For more information about API tags see API Message Tags on page 160.

17. To set a different Customer Group, set of Exclusion Lists, or Email Sender for this message only, configure these using the lists located under Advanced Options for Message 1.

18. Optional: To configure additional cart abandonment rules, follow the previous steps (start at 11) to configure Message 2 and Message 3.

   Only Message 1 can be configured to send transactional messages. Message 2 and 3 must be marketing messages.

19. Click Save Changes to save all of the message configuration changes you have made.

   If you move to a different message type without clicking Save Changes your changes will not be lost. However, it is a best practice to click Save Changes after you complete a large chunk of work so it isn't lost if the system logs you out due to inactivity.

   ✋ Note: Bronto will only create a new blank message in Bronto on mapping save. To import Magento message content, use Add or Update All Mapped System Messages or Test Import on the Advanced page.

Related Topics
API Message Tags on page 160
API Message tags allow you to include data stored outside of Bronto in your messages when you send messages using the API.
Configure Magento Connector Wishlist Messages

Magento Connector can be configured to use information about wishlist activity from your store to send wishlist reminder messages.

Wishlist message sending can be configured to send up to three different messages. You can configure different abandonment settings for each message and can use the following in API tags in your wishlist messages:

<table>
<thead>
<tr>
<th>API Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>quoteURL</td>
<td>Cart redirect link.</td>
</tr>
<tr>
<td>productId_#</td>
<td>Unique identifier for the product.</td>
</tr>
<tr>
<td>productName_#</td>
<td>Name of the product.</td>
</tr>
<tr>
<td>productSku_#</td>
<td>SKU number for the product.</td>
</tr>
<tr>
<td>productImgUrl_#</td>
<td>URL for the main image for the product.</td>
</tr>
<tr>
<td>productUrl_#</td>
<td>URL representing the product page on the storefront.</td>
</tr>
<tr>
<td>productQty_#</td>
<td>Number ordered.</td>
</tr>
<tr>
<td>productDescription_#</td>
<td>Description of the product.</td>
</tr>
<tr>
<td>productPrice_#</td>
<td>Line item price.</td>
</tr>
<tr>
<td>productTotal_#</td>
<td>Line item row total.</td>
</tr>
</tbody>
</table>

For more information about API tags see API Message Tags on page 160.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Messages.
4. If you haven't already, configure your default sender options.
5. Click on the Wishlists tab to configure wishlist message sending.
6. Set Enabled to Yes.
7. If you want to specify a specific Magento email sender select the sender from the Email Sender list.
   If you do not see the sender you want to use, configure a new sender in Magento.
8. Select any Bronto lists of contacts you want to be excluded from this send from Exclusion Lists.
   You can select multiple Bronto lists. Any contacts that are on an exclusion list will not be considered for the send.
9. Click Advanced options and configure sending options if you do want to use sending options that are different from the default.
10. Under Message 1, set Enabled to Yes.
11. Select the Bronto message you want to send from the Message list.
12. Use Abandon Units and Abandon Period to configure your wishlist abandonment settings.
   The combination of these two settings determine the amount of inactive time that an item has to sit on a wishlist before a wishlist reminder message is sent. For example, if you set Abandon Period to 7 and Abandon Units to Days, then any wishlist that has had an item on it for 7 days without activity is considered for a send. However, the contact must still meet the Wishlist message rules you configured in order to be sent the message.
13. Select whether the message is a Marketing or Transactional message from the Send Type list.
   Remember, the message content should match the selected Send Type. For example, do not select a marketing message for a transactional send.
14. Click Advanced options and configure sending options if you do want to use sending options that are different from the default.
15. Optional: To use a coupon with your message:

Before you use coupons within your messages you need to use the Coupons tab to enable Magento Connector to manage/generate coupons. For more information see Configure Magento Connector Coupons on page 1250.

a) Click Advanced options.
b) To use an already generated coupon:
   1. Select Specific Coupon from the Coupon Type list.
   2. Click Select.
   3. Click on the coupon you want to use.
      If you do not see a coupon, you need to use the Coupons tab to configure Magento Connector coupons.
   4. Click Confirm.
c) To generate a coupon:

This will generate the coupon when the email is sent and send the coupon details to Magento.

1. Select Generator from the Coupon Type list.
2. Select the generator you want to use from the Coupon Generator list.

If you do not see a generator, you need to use the Coupons tab to configure Magento Connector coupons.

Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%.
For more information about API tags see API Message Tags on page 160.

16. To use a different Email Sender or set of Exclusion Lists for this message only, configure these using the lists located under Advanced Options for Message 1.

17. Optional: To configure additional wishlist sending rules, follow the previous steps (start at 10) to configure Message 2 and Message 3.

18. Click Save Changes to save all of the message configuration changes you have made.

If you move to a different message type without clicking Save Changes your changes will not be lost. However, it is a best practice to click Save Changes after you complete a large chunk of work so it isn't lost if the system logs you out due to inactivity.

Note: Bronto will only create a new blank message in Bronto on mapping save. To import Magento message content, use Add or Update All Mapped System Messages or Test Import on the Advanced page.

Related Topics
API Message Tags on page 160
API Message tags allow you to include data stored outside of Bronto in your messages when you send messages using the API.

Configure Magento Connector Review Messages
Magento Connector can be configured to use information about order activity to send messages that request reviews of recently purchased items.

Review message sending can send a single message that requests the contact review a recently purchased item. You can configure the message to send a set number of days after an order has reached a particular status. The following variables can be used in API tags in your review messages:

<table>
<thead>
<tr>
<th>API Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>subtotal</td>
<td>Subtotal for the cart.</td>
</tr>
<tr>
<td>subtotalExclTax</td>
<td>Subtotal for the cart without tax.</td>
</tr>
<tr>
<td>subtotalIncTax</td>
<td>Subtotal for the cart with tax.</td>
</tr>
<tr>
<td>grandTotal</td>
<td>The combined total prices for all items in an order, minus discounts, plus tax and shipping costs.</td>
</tr>
<tr>
<td>API Value</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>quoteURL</td>
<td>Cart redirect link.</td>
</tr>
<tr>
<td>productId_#</td>
<td>Unique identifier for the product.</td>
</tr>
<tr>
<td>productName_#</td>
<td>Name of the product.</td>
</tr>
<tr>
<td>productSku_#</td>
<td>SKU number for the product.</td>
</tr>
<tr>
<td>productImgUrl_#</td>
<td>URL for the main image for the product.</td>
</tr>
<tr>
<td>productUrl_#</td>
<td>URL representing the product page on the storefront.</td>
</tr>
<tr>
<td>productQty_#</td>
<td>Number ordered.</td>
</tr>
<tr>
<td>productDescription_#</td>
<td>Description of the product.</td>
</tr>
<tr>
<td>productPrice_#</td>
<td>Line item price.</td>
</tr>
<tr>
<td>productPriceExclTax_#</td>
<td>Line item price excluding tax.</td>
</tr>
<tr>
<td>productPriceInclTax_#</td>
<td>Line item price including tax.</td>
</tr>
<tr>
<td>productTotal_#</td>
<td>Line item row total.</td>
</tr>
<tr>
<td>productTotalExclTax_#</td>
<td>Line item row total excluding tax.</td>
</tr>
<tr>
<td>productTotalInclTax_#</td>
<td>Line item row total including tax.</td>
</tr>
</tbody>
</table>

For more information about API tags see API Message Tags on page 160.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Messages**.
4. If you haven't already, configure your default sender options.
   
5. Click on the **Reviews** tab to configure review message sending.
6. Set **Enabled** to **Yes**.
7. Select the Magento order status that will trigger this message from the **Order Status** list.
8. Select any Magento order statuses that you want excluded from consideration for this send from the **Order Cancel Status** list.
9. Select the Bronto message you want to send from the **Messages** list.
10. Select the number of days you want to pass after the selected **Order Status** is reached before the send is triggered from the **Send Period** list.
    
    For example, if this is set to 8, then the message will be sent 8 days after the **Order Status** is reached. However, if the order's status has been updated to the **Order Cancel Status** during this time then the send will not be triggered.
11. Optional: If you do not want to use the default **Product URL Suffix**, enter a new one in the box.
    
    This is appended to the product URL and provides a link to a review form in the message. If you leave this blank, then just the product URL is provided.
12. Optional: If you want to limit review requests to specific Magento categories, select them from the **Include Categories** list.
13. If you want to specify a specific Magento email sender select the sender from the **Email Sender** list.
    
    If you do not see the sender you want to use, configure a new sender in Magento.
14. Select the Magento customer group you want to target from the **Customer Group** list.
You can select multiple customer groups. Only members of these groups will be considered for the send.

15. Select any Bronto lists of contacts you want to be excluded from this send from **Exclusion Lists**.

You can select multiple Bronto lists. Any contacts that are on an exclusion list will not be considered for the send.

16. Optional: If you want to exclude Magento categories from this send select them from the **Exclusion Categories** list.

17. Click **Advanced options** and configure sending options if you do want to use sending options that are different from the default.

18. Optional: To use a coupon with your message:

Before you use coupons within your messages you need to use the **Coupons** tab to enable Magento Connector to manage/generate coupons. For more information see Configure Magento Connector Coupons on page 1250.

a) Click **Advanced options**.

b) To use an already generated coupon:

1. Select **Specific Coupon** from the **Coupon Type** list.
2. Click **Select**.
3. Click on the coupon you want to use.

If you do not see a coupon, you need to use the **Coupons** tab to configure Magento Connector coupons.

4. Click **Confirm**.

c) To generate a coupon:

This will generate the coupon when the email is sent and send the coupon details to Magento.

1. Select **Generator** from the **Coupon Type** list.
2. Select the generator you want to use from the **Coupon Generator** list.

If you do not see a generator, you need to use the **Coupons** tab to configure Magento Connector coupons.

Coupons generated from Magento can be added to your message using the API tag `%%#couponCode%%`. For more information about API tags see [API Message Tags](#) on page 160.

19. Click **Save Changes** to save all of the message configuration changes you have made.

If you move to a different message type without clicking **Save Changes** your changes will not be lost. However, it is a best practice to click **Save Changes** after you complete a large chunk of work so it isn't lost if the system logs you out due to inactivity.

Note: Bronto will only create a new blank message in Bronto on mapping save. To import Magento message content, use **Add or Update All Mapped System Messages** or **Test Import** on the **Advanced** page.

**Related Topics**

- [API Message Tags](#) on page 160

API Message tags allow you to include data stored outside of Bronto in your messages when you send messages using the API.

**Configure Magento Connector Reorder Messages**

Magento Connector can be configured to use information about order activity to send messages that remind a contact to reorder previously purchased products.

Reorder message sending can send a message reminding the contact to reorder a previously purchased item. You can configure the message to send a set number of days after an order has reached a particular status. You also have the option of including a **Send Period Per Unit** multiplier. This will extend the amount of time before a reorder reminder is sent based on the quantity purchased.

The following variables can be used in API tags in your reorder messages:

<table>
<thead>
<tr>
<th>API Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>subtotal</td>
<td>Subtotal for the cart.</td>
</tr>
</tbody>
</table>
### Table: API Value and Description

<table>
<thead>
<tr>
<th>API Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>subtotalExclTax</td>
<td>Subtotal for the cart without tax.</td>
</tr>
<tr>
<td>subtotalInclTax</td>
<td>Subtotal for the cart with tax.</td>
</tr>
<tr>
<td>grandTotal</td>
<td>The combined total prices for all items in an order, minus discounts, plus tax and shipping costs.</td>
</tr>
<tr>
<td>quoteURL</td>
<td>Cart redirect link.</td>
</tr>
<tr>
<td>productId</td>
<td>Unique identifier for the product.</td>
</tr>
<tr>
<td>productName</td>
<td>Name of the product.</td>
</tr>
<tr>
<td>productSku</td>
<td>SKU number for the product.</td>
</tr>
<tr>
<td>productImgUrl</td>
<td>URL for the main image for the product.</td>
</tr>
<tr>
<td>productUrl</td>
<td>URL representing the product page on the storefront.</td>
</tr>
<tr>
<td>productQty</td>
<td>Number ordered.</td>
</tr>
<tr>
<td>productDescription</td>
<td>Description of the product.</td>
</tr>
<tr>
<td>productPrice</td>
<td>Line item price.</td>
</tr>
<tr>
<td>productPriceExclTax</td>
<td>Line item price excluding tax.</td>
</tr>
<tr>
<td>productPriceInclTax</td>
<td>Line item price including tax.</td>
</tr>
<tr>
<td>productTotal</td>
<td>Line item row total.</td>
</tr>
<tr>
<td>productTotalExclTax</td>
<td>Line item row total excluding tax.</td>
</tr>
<tr>
<td>productTotalInclTax</td>
<td>Line item row total including tax.</td>
</tr>
</tbody>
</table>

For more information about API tags see API Message Tags on page 160.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Messages.
5. Click on the Reorders tab to configure reorder message sending.
6. Set Enabled to Yes.
7. Select the Magento order status that will trigger this message from the Order Status list.
8. Select any Magento order statuses that you want excluded from consideration for this send from the Order Cancel Status list.
9. Select the number of days you want to pass after the selected Order Status is reached before the send is triggered from the Send Period list.

For example, if this is set to 8, then the message will be sent 8 days after the Order Status is reached. However, if the order's status has been updated to the Order Cancel Status during this time then the send will not be triggered.

10. If you want to take the quality of a product ordered into account when triggering a send set Send Period Per Unit to Yes.

   This will multiply the set send period by the quantity of a product that was ordered. For example, if you set Send Period to 3 and enable Send Period Per Unit when a contact orders 3 units of an item the reorder rules will be triggered after 9 days. (3 multiplied by 3)
11. If you want to specify a specific Magento email sender select the sender from the Email Sender list.
   If you do not see the sender you want to use, configure a new sender in Magento.

12. Select the Magento customer group you want to target from the Customer Group list.
   You can select multiple customer groups. Only members of these groups will be considered for the send.

13. Select any Bronto lists of contacts you want to be excluded from this send from Exclusion Lists.
   You can select multiple Bronto lists. Any contacts that are on an exclusion list will not be considered for the send.

14. Optional: If you want to exclude Magento categories from this send select them from the Exclusion Categories list.

15. Click Advanced options and configure sending options if you do want to use sending options that are different from the default.

16. Optional: To use a coupon with your message:
   Before you use coupons within your messages you need to use the Coupons tab to enable Magento Connector to manage/generate coupons. For more information see Configure Magento Connector Coupons on page 1250.
   a) Click Advanced options.
   b) To use an already generated coupon:
      1. Select Specific Coupon from the Coupon Type list.
      2. Click Select.
      3. Click on the coupon you want to use.
      
      If you do not see a coupon, you need to use the Coupons tab to configure Magento Connector coupons.
      4. Click Confirm.
   c) To generate a coupon:
      This will generate the coupon when the email is sent and send the coupon details to Magento.
      1. Select Generator from the Coupon Type list.
      2. Select the generator you want to use from the Coupon Generator list.
      
      If you do not see a generator, you need to use the Coupons tab to configure Magento Connector coupons.
      Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%. For more information about API tags see API Message Tags on page 160.
   17. Click Create New Message to configure a message to use for reorders.
   18. Enter a name for this sending rule in the Name box.
   19. Select the Bronto message you want to send from the Messages list.
   20. Select the Magento categories to associate with this message from Include Categories.
      Associating specific messages with defined categories helps to better target the content and design of your messages.
   21. Click Advanced options and configure sending options if you do want to use sending options that are different from the default.
   22. Optional: To use a coupon with your message:
      Before you use coupons within your messages you need to use the Coupons tab to enable Magento Connector to manage/generate coupons. For more information see Configure Magento Connector Coupons on page 1250.
      a) Click Advanced options.
      b) To use an already generated coupon:
         1. Select Specific Coupon from the Coupon Type list.
         2. Click Select.
         3. Click on the coupon you want to use.
         
         If you do not see a coupon, you need to use the Coupons tab to configure Magento Connector coupons.
         4. Click Confirm.
c) To generate a coupon:

This will generate the coupon when the email is sent and send the coupon details to Magento.

1. Select Generator from the Coupon Type list.
2. Select the generator you want to use from the Coupon Generator list.

   If you do not see a generator, you need to use the Coupons tab to configure Magento Connector coupons. Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%.

   For more information about API tags see API Message Tags on page 160.

23. Optional: Click Advanced options and configure sending rules specific to this message if you do not want to use the general reorder sending rules configured above.

   This includes all of the order status, send period, exclusion, etc. options configured above. You only need to adjust each of these options if you do not want to use the default. If you want to use the default for any option, ignore the advanced options setting for it.

24. When you finish configuring the message-specific settings, click Save.

25. Optional: To configure additional messages, click Create New Message and follow all of the steps for configuring a message-level send.

26. Click Save Changes to save all of the message configuration changes you have made.

   If you move to a different message type without clicking Save Changes your changes will not be lost. However, it is a best practice to click Save Changes after you complete a large chunk of work so it isn't lost if the system logs you out due to inactivity.

Note: Bronto will only create a new blank message in Bronto on mapping save. To import Magento message content, use Add or Update All Mapped System Messages or Test Import on the Advanced page.

Related Topics

API Message Tags on page 160

API Message tags allow you to include data stored outside of Bronto in your messages when you send messages using the API.

Configure Magento Connector Care Tips Messages

Magento Connector can be configured to use information about order activity to send messages that provide additional care tips for purchased items.

Care tip message sending can send a message that provides additional information about a recently purchased item. You can configure the message to send a set number of days after an order has reached a particular status. When you configure a care tip message you must provide a content block that will replace the %%#content%% API tag when the message is sent. This content block should contain the relevant care tips.

In addition to this API tag, the following variables can be used in API tags in your care tip messages:

<table>
<thead>
<tr>
<th>API Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>subtotal</td>
<td>Subtotal for the cart.</td>
</tr>
<tr>
<td>subtotalExclTax</td>
<td>Subtotal for the cart without tax.</td>
</tr>
<tr>
<td>subtotalInclTax</td>
<td>Subtotal for the cart with tax.</td>
</tr>
<tr>
<td>grandTotal</td>
<td>The combined total prices for all items in an order, minus discounts, plus tax and shipping costs.</td>
</tr>
<tr>
<td>quoteURL</td>
<td>Cart redirect link.</td>
</tr>
<tr>
<td>productId</td>
<td>Unique identifier for the product.</td>
</tr>
<tr>
<td>productName</td>
<td>Name of the product.</td>
</tr>
<tr>
<td>productSku</td>
<td>SKU number for the product.</td>
</tr>
</tbody>
</table>
### API Value Description

<table>
<thead>
<tr>
<th>API Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>productImgUrl</td>
<td>URL for the main image for the product.</td>
</tr>
<tr>
<td>productUrl</td>
<td>URL representing the product page on the storefront.</td>
</tr>
<tr>
<td>productQty</td>
<td>Number ordered.</td>
</tr>
<tr>
<td>productDescription</td>
<td>Description of the product.</td>
</tr>
<tr>
<td>productPrice</td>
<td>Line item price.</td>
</tr>
<tr>
<td>productPriceExclTax</td>
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<td>productTotalInclTax</td>
<td>Line item row total including tax.</td>
</tr>
</tbody>
</table>

For more information about API tags see [API Message Tags](#) on page 160.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Messages**.
4. If you haven't already, configure your default sender options.

5. Click on the **Care Tips** tab to configure care tip message sending.
6. Set **Enabled** to **Yes**.
7. Select the Magento order status that will trigger this message from the **Order Status** list.
8. Select any Magento order statuses that you want excluded from consideration for this send from the **Order Cancel Status** list.
9. Select the number of days you want to pass after the selected **Order Status** is reached before the send is triggered from the **Send Period** list.

   For example, if this is set to 8, then the message will be sent 8 days after the **Order Status** is reached. However, if the order's status has been updated to the **Order Cancel Status** during this time then the send will not be triggered.
10. If you want to specify a specific Magento email sender select the sender from the **Email Sender** list.

    If you do not see the sender you want to use, configure a new sender in Magento.
11. Select the Magento customer group you want to target from the **Customer Group** list.

    You can select multiple customer groups. Only members of these groups will be considered for the send.
12. Select any Bronto lists of contacts you want to be excluded from this send from **Exclusion Lists**.

    You can select multiple Bronto lists. Any contacts that are on an exclusion list will not be considered for the send.
13. Optional: If you want to exclude Magento categories from this send select them from the **Exclusion Categories** list.
14. Click **Advanced options** and configure sending options if you do want to use sending options that are different from the default.
15. Optional: To use a coupon with your message:

   Before you use coupons within your messages you need to use the **Coupons** tab to enable Magento Connector to manage/generate coupons. For more information see Configure Magento Connector Coupons on page 1250.

   a) Click **Advanced options**.
b) To use an already generated coupon:
   1. Select Specific Coupon from the Coupon Type list.
   2. Click Select.
   3. Click on the coupon you want to use.
      If you do not see a coupon, you need to use the Coupons tab to configure Magento Connector coupons.
   4. Click Confirm.

c) To generate a coupon:
   This will generate the coupon when the email is sent and send the coupon details to Magento.
   1. Select Generator from the Coupon Type list.
   2. Select the generator you want to use from the Coupon Generator list.
      If you do not see a generator, you need to use the Coupons tab to configure Magento Connector coupons.
      Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%.
      For more information about API tags see API Message Tags on page 160.

16. Click Create New Message to configure a message to use for care tips.
17. Enter a name for this sending rule in the Name box.
18. Select the Bronto message you want to send from the Messages list.
19. Enter the care tip content you want included in the message in the Content box.
   This replaces the %%#extraContent%% API tag when the message is sent.
20. Select the Magento categories to associate with this message from Include Categories.
   Associating specific messages with defined categories helps to better target the content and design of your messages.
21. Click Advanced options and configure sending options if you do want to use sending options that are different from the default.
22. Optional: To use a coupon with your message:
   Before you use coupons within your messages you need to use the Coupons tab to enable Magento Connector to manage/generate coupons. For more information see Configure Magento Connector Coupons on page 1250.
   a) Click Advanced options.
   b) To use an already generated coupon:
      1. Select Specific Coupon from the Coupon Type list.
      2. Click Select.
      3. Click on the coupon you want to use.
         If you do not see a coupon, you need to use the Coupons tab to configure Magento Connector coupons.
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         If you do not see a generator, you need to use the Coupons tab to configure Magento Connector coupons.
         Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%.
         For more information about API tags see API Message Tags on page 160.

23. Optional: Click Advanced options and configure sending rules specific to this message if you do not want to use the general care tip sending rules configured above.
   This includes all of the order status, send period, exclusion, etc. options. You only need to adjust each of these options if you do not want to use the default. If you want to use the default for any option, ignore the advanced options setting for it.
24. When you finish configuring the message-specific settings, click **Save**.

25. Optional: To configure additional messages, click **Create New Message** and follow all of the steps for configuring a message-level send.

26. Click **Save Changes** to save all of the message configuration changes you have made.

If you move to a different message type without clicking **Save Changes** your changes will not be lost. However, it is a best practice to click **Save Changes** after you complete a large chunk of work so it isn't lost if the system logs you out due to inactivity.

**Note:** Bronto will only create a new blank message in Bronto on mapping save. To import Magento message content, use **Add or Update All Mapped System Messages** or **Test Import** on the **Advanced** page.

**Related Topics**

- **API Message Tags** on page 160
- API Message tags allow you to include data stored outside of Bronto in your messages when you send messages using the API.

**Configure Magento Connector Coupons**

You can use the Magento Connector to manage coupon code assignment and the display of coupon codes used with your Magento site.

General **Settings** on the **Coupon** tab will configure a coupon redirect link that can be used in messages. This redirect link can be used with Coupon Manager coupon codes or coupon codes generated using Magento. It will not generate coupon codes. While these codes can be used with Coupon Manager, this app is not required if you want to use the codes directly with Magento.

The redirect URL will vary slightly depending on which Magento Connector version you're using:

- **M1:** http://example.com/brontosoftware/redirect/index?service=coupon
- **M2:** http://example.com/bronto/redirect/index?service=coupon&coupon=%%#couponCode%%. In your redirect URL, replace example.com with the domain used for your Magento site. **Settings** can be used to configure the messages that will be displayed to contacts for each status of a coupon.

Additionally, you can use **Create New Coupon Generator** to configure a coupon generator that you can point to when you want Bronto to generate coupons in messages when they are sent.

Coupons generated from Magento can be added to your message using the API tag %%#couponCode%%. For more information about API tags see **API Message Tags** on page 160.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Coupons**.
4. Set **Enabled** to **Yes**.
5. Optional: If you want to use a different query parameter than **coupon** in the URL for valid coupons, enter it in the **Coupon Code Query Parameter** box.
   
   If you change the query parameter, make sure the change is reflected in the redirect URL outlined above.
6. Optional: If you want to use a different query parameter than **invalid_coupon** in the URL for invalid coupons, enter it in the **Invalid Coupon Query Parameter**.
7. If you want to provide a notification for contacts when they try to use a coupon in your store set **Display Message** to **Yes** and configure the message for each type of message:
   - **Success Message** is used when the coupon was successfully added to the shopping session.
   - **Invalid Message** is used when the coupon could not be added because it is invalid.
   - **Depleted Message** is used when the coupon pool has been used to completion.
   - **Expired Message** is used when the coupon has expired.
• **Conflict Message** is used when the shopping session or cart already has a coupon applied.

8. Click **Save Changes**.

9. Click **Create New Coupon Generator** to configure a coupon generator you can point to when you want Bronto to generate coupons in messages when they are sent.

   This can populate an existing Shopping Cart Price Rule in Magento, and be dynamically included in messages that are triggered by the integration sent through Bronto.

10. Enter a name for the generator in the **Name** box.

11. Set **Enabled** to **Yes**.

12. Connect the generator to a Magento shopping cart price rule:
   
   a) Click the **Shopping Cart Price Rule Select** button.
   
   b) Select from the **Coupon** list.
   
   c) Enter in the **Coupon Code** box.
   
   d) Select whether you want to **Use Auto Generation**.
   
   e) Click **Confirm**.

13. Select the format to use for coupon codes from the **Code Format** list.

14. Set the number of characters to use for the coupon code in **Code Length**.

15. Optional: Enter a prefix to add to generated coupon codes in the **Code Prefix** box.

   This can be used to help identify groups of coupon codes and to group redemption metrics.

16. Optional: Enter a suffix to add to generated coupon codes in the **Code Suffix** box.

   This can be used to help identify groups of coupon codes and to group redemption metrics.

17. To add dashes to coupon codes after so many characters set the desired interval in the **Dash Every X Characters**.

   Dashes can make long coupon codes easier to read.

18. Optional: If you use Coupon Manager and want to allow Magento Connector to replenish coupon codes to a campaign:

   a) Set **Coupon Campaign Sync** to **Yes**.
   
   b) Select the Coupon Manager campaign from the **Coupon Campaign** list.
   
   c) Set the **Replenish Threshold**.

      When the unused coupon amount dips below the **Replenish Threshold**, the Magento Connector uploads coupons codes equal to the **Replenish Amount** to the Coupon Manager campaign specified.
   
   d) Set the number of coupon codes you want to generate in the **Replenish Amount** box.
   
   e) Optional: Use **Replenish Until** to enter a date you want to stop replenishing coupons.

19. Click **Save** to save the generator.

20. Repeat the **Create New Coupon Generator** steps, as necessary, to create more coupon generators.

### Configure Magento App Integrations

The Magento Connector can be used to supply data to several Bronto apps.

Using the Magento Connector to configure a connection between a Bronto app and Magento can supply some of the data set up required for various applications. Apps that you can integrate with Magento include:

- **Browse Recovery.** This connection will send browse related events from your Magento domain to Browse Recovery app.
- **Cart Recovery.** This connection will use the cart and order data from your Magento domain for the Cart Recovery data. If you enable this, you should remove the embedded tag manager from your site if it is already configured.
- **Pop-Up Manager.** This connection will deploy your pop-ups to your Magento domain. If you enable this, you should remove the embedded code snippet from your site if it is already configured.
- **Coupon Manager.** This connection sends coupon redemption stats for your Magento domain to Bronto.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.

3. Click **Integrations**.

4. Find the app you want to use Magento with and set **Enabled** to **Yes**.

5. If you enabled Browse Recovery, you must **configure your Browse Recovery selectors to use Magento**.

6. If you enabled Cart Recovery, enter the CSS selector used to capture emails on your site in the **Email Capture CSS** box.

   If you have previously set up Cart Recovery by **adding the Tag Manager custom embed code to your site**, you should remove it.

7. If you enabled Pop-Up Manager
   a) Enter the domain for your site in the **Domain** box.
   b) Select whether you want to automatically subscribe contacts who submit the pop-up to your Magento newsletter.

8. If you enabled Coupon Manager select whether you use an **API** or storefront **JavaScript** integration.

   If you are unsure, select **API**.

9. When you have finished configuring all of your app integration settings, click **Save Changes**.

**Related Topics**

**Capture Browse Data** on page 1463

You can configure Bronto to capture browse data from your site. Browse data is information about which products your contacts view.

**Magento Connector Advanced Options**

The Magento Connector Advanced page provides several options you can use to tweak and/or test your connector settings.

Each option on this page is explained in the table below.

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Mode</td>
<td>Enabling this turns off the exchange of data. You might want to use test mode if you are concerned there is a problem with the connector. It is enabled by default for Sandbox accounts. Magento Connector has two test modes:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Pause Event Queuing</strong> turns off the collection of data all together. Any events that occur when this is enabled will not be imported when this is set back to disabled.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Pause Event Processing</strong> turns off the import of data but stores data so that it can be imported when this is set back to disabled.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Both pause event settings must be set to <strong>No</strong> to fully test connector modules. With events running, Connector will start collecting data from this point forward.</td>
</tr>
<tr>
<td>Settings</td>
<td><strong>Send Table Cleanup</strong> is the number of days scheduled messages can sit in the send queue before being deleted.</td>
</tr>
<tr>
<td>Statistic</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Schedule Task</td>
<td>You can manually run the following processes:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Process Import Queue</strong> to immediately start an import of everything that is in the import queue.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Add or Update All Mapped System Messages</strong> to immediately start an import of all mapped system messages.</td>
</tr>
<tr>
<td></td>
<td><strong>Important:</strong> You must configure your system messages before you can run <strong>Add or Update All Mapped System Messages</strong>.</td>
</tr>
<tr>
<td></td>
<td>Running <strong>Add or Update All Mapped System Messages</strong> will overwrite all mapped message rules in Bronto with the content from the templates in Magento. Therefore, if you have already imported and updated Magento message templates in Bronto, it's best to use <strong>Test Import</strong> on the Advanced page to import additional Magento templates.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Search Queued Message</strong> to search for a queued cart, wishlist, reorder, review, or care tip message using a customer email address.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Replenish Coupon Pool</strong> to replenish a selected coupon generator by the specified <strong>Replenish Amount</strong>.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Sync Product Catalog Fields</strong> to builds the Bronto Product Catalog fields and mappings from the selected product mappings.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Preview Recommendation</strong> to generate example related product API tags for a simulated recommendation.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Index Recommendation Reports</strong> to run a recommendation index report.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Preview Configured Settings</strong> to display the current configuration across all modules as recognized by the Magento platform.</td>
</tr>
<tr>
<td></td>
<td>After you run a process you can view the results in the Execution Results area. Click <strong>View Results</strong> for a detailed report.</td>
</tr>
<tr>
<td>Add to Import Queue</td>
<td>Manually adds data to the import queue so that it is run as part of the next scheduled import process. After you run a process you can view the results in the Execution Results area. Click <strong>View Results</strong> for a detailed report.</td>
</tr>
<tr>
<td>Test Import</td>
<td>Manually runs an import so you can view if your import configuration settings will import data as expected. After you run a process you can view the results in the Execution Results area. Click the <strong>Advanced</strong> tab to refresh the page and then click <strong>View Results</strong> for a detailed report.</td>
</tr>
<tr>
<td>Execution Results</td>
<td>Here you can see the results of your test imports. Click <strong>View Results</strong> for a detailed report.</td>
</tr>
</tbody>
</table>
Disable M2 Connector from the Command Line

You can disable your Magento 2 Connector, without uninstalling it, by using the command line.

1. Log in as the Magento file system owner.
2. Change to your Magento installation directory.
3. Run the following command to disable the M2 Connector:

   ```
   php bin/magento module:disable Bronto_Browse Bronto_Cart Bronto_Connector
   Bronto_CONTACT Bronto_Coupon Bronto_Email Bronto_Integration
   Bronto_Inventory Bronto_Magento Bronto_Notification Bronto_Optin
   Bronto_Order Bronto_Product Bronto_Rating Bronto_Redemption
   ```

Uninstall An M2 Magento Connection

You can stop the exchange of data and de-register the Magento Connector using Bronto and Magento, but you must also update the Magento file system and database to completely uninstall the connector.

Therefore, the person who uninstalls the M2 Magento Connector must be able to access the Magento database and file system in order to remove code related to the connector. You can stop the exchange of data and de-register the connector without this access, but Magento will attempt to continue to load the connector until the file and database changes are made.

To uninstall for M2:

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Advanced and
   a) Set Pause Event Queuing to Yes.
   b) Set Pause Event Processing to Yes.
   This turns off the exchange of data between Bronto and the connector.
4. In Magento go to System > Bronto Connector and click the Delete button.
   This will de-register the connector from Magento.
5. Open the base Magento composer.json file in a code editor.
6. Run
   ```
   ./bin/magento module:disable Bronto_Browse Bronto_Cart Bronto_Connector
   Bronto_CONTACT Bronto_Coupon Bronto_Email Bronto_Integration
   Bronto_Inventory Bronto_Magento Bronto_Notification Bronto_Optin
   Bronto_Order Bronto_Product Bronto_Rating Bronto_Redemption
   ```
7. Run
   ```
   ./bin/magento setup:upgrade
   ```
8. Run composer remove bronto/magento-module-all
9. Remove the following from the base Magento composer.json file:

   ```
   "repositories": [
   {
   "type": "composer",
   "url": "https://cdn.bronto.com/magento"
   }
   ]
   ```
10. Run composer update --lock
11. Open the core_resource table in the Magento database and delete all entries that are prefixed with bronto.

Magento 2 Release Notes

The release notes for Magento 2 Connector
March 2018
On March 16, 2018, the Bronto Connector for Magento 2 was revised to version 3.6.0. The release includes a change to our attribution model and PHP revision in support of Magento Commerce Cloud.

December 2017
On December 13, 2017, Bronto released version 3.5.1 of the Connector for Magento 2. This release contained bug fixes related to:

1. The circumstance when an M2 connector is configured with multiple website scopes. The product URLs for Carts have been corrected to direct the user to the expected product details page.
2. An error with new product imports.

On December 4, 2017 we released version 3.5.0 of the Magento 2 Connector, which provides support for PHP7 Magento sites, including Magento Commerce Cloud.

October 2017
On October 11, 2017, the Bronto Connector for Magento 2 was revised to version 3.4.0. This release includes support for custom admin URLs.

September 2017
On September 18, 2017, the Bronto Connector for Magento 2 was revised to version 3.3.1. It addresses several customer-reported bug fixes related to parent product ID values.

On September 7, 2017, the Bronto Connector for Magento 2 was revised to version 3.3.0. This release fixes bugs and allows for M2 certification. It also addresses customer-reported bug fixes related to registration objects.

August 2017
On August 23, 2017, the Bronto Connector for Magento 2 was revised to version 3.2.0. This release includes support for including VAT (an international tax) on line items to be used in Cart Recovery. It also addresses several customer-reported bug fixes related to order imports.

Demandware Connector
The Demandware Connector provides an integration between your Bronto and Demandware accounts so that Demandware data can be imported and used in Bronto.

This connection between your storefront and marketing platform provides a powerful tool for ensuring that your marketing campaigns are targeting the behavior and needs of your customers. With the Demandware Connector you can:

• Map and import Demandware customer information to contact fields in Bronto.
• Automatically add contacts who opt-in for marketing emails on your Demandware site to Bronto to drive email lists growth.
• Import past-purchase information from Demandware for more targeted and personalized marketing campaigns.
• Insert recommended products into email messages with either API tags or content tags.
• Send any Demandware transactional message (or a custom message) directly through Bronto.
• Integrate your Demandware site data with several Bronto apps.

Set Up A Demandware Connection
Follow these steps to connect your Demandware account to your Bronto account. For more details on the steps below see the documentation included with the cartridge archive.

Before you can set up the connector you must complete the following prerequisites in Demandware:
• Install the Bronto Cartridge in your Demandware instance.
• Add the Bronto Cartridge path to all sites in Business Manager that require integration with Bronto.
• From the Bronto Connector cartridge metadata folder, install required metadata XML files. This will setup the Bronto jobs, objects and services.
• Enable and configure Bronto jobs.
• Grant appropriate permission to the Bronto Manage Registration module in Demandware.

1. In Bronto, go to Apps > Connector.
2. Click Add Connection.
3. Click Demandware.
4. Copy the Account ID.
5. In Demandware, go to Merchant Tools > Bronto > Manage Registration.
6. Enter your Bronto Connector Account ID. This is the ID you copied from Bronto.
7. Click Register.
8. In Bronto, go to Apps > Connectors.
9. These are the steps you should take if you see a warning icon next to your Demandware connector:
   a) Click the red icon.
   b) Enter the storefront username and password for your Demandware instance.
   c) Click Login.
   d) Confirm that you no longer see a warning icon.
10. Click the Demandware connector Edit button.
11. Click Advanced.
12. Scroll down to the Verify Installation section.
13. Click Execute.
14. Go to the Execution Results section and confirm that you see Verify Installation listed. If you do not see Verify Installation, confirm in Demandware that the Bronto Jobs Runner job is enabled.

To complete installation, you will need to take the following actions in Demandware:

• Insert pipelets for sending transactional messages.
• Insert pipelets for email opt-in/opt-out points of capture (ie: footer, checkout, account registration).
• Insert brontofooter.isml in storefront global footer. This footer must be on every Demandware page.

Configure Demandware Connector Contacts Module

Using the Demandware Connector Contacts Module you can import your Demandware customers with a valid contact record into Bronto.

Once configured, this will import a contact's email and any contact fields you have mapped from Demandware into Bronto. Unless you also configure opt-ins, all contacts are imported with transactional status.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Contacts.
4. Set Enabled to Yes.
5. To set the import schedule:
   a) Click Advanced Options.
   b) Select how often you want imports to run from the Frequency list.

   By default imports are run in 1,000 record batches, so the frequency also determines the maximum number of records Bronto will attempt to import in a day. For example, if you set Frequency to Daily, the maximum number of record imports in a day will be 1,000. Inversely, if you set Frequency to once every hour, the maximum number of imports is 24,000 per day.
Integrate

c) Optional: If you selected Minute Intervals, select a number of minutes from the Interval list.

For example, if you select 30, imports will run at 30 minute intervals. We recommend 1 minute for the initial sync, and 15 minutes after that.
d) Set a Start Time.
e) Set an End Time.

If you selected daily, you will not see an option to set an End Time.
f) In the Days section, select which days of the week you want imports to run.

If a day box has a check mark, the import will run on this day at the interval frequency you set.

6. Map the Demandware customer attributes shown on the left to Bronto contact fields by selecting the contact field from the list on the right. The most commonly mapped attributes are Profile Attributes, Phone Numbers, Address Book, Active Data, and Other.

The list of available attributes are pulled directly from your Demandware account. Only map the attributes you want to import. If you do not see an attribute, log into Demandware and make sure it exists in your Demandware account.

If you have added new customer profile attributes to Demandware after the initial Connector registration, you will need to navigate to Apps > Connector and click Sync to refresh the list of attributes.

7. If you need to create a new Bronto Contact Field, take these steps.
   a) Verify that your field has not already been created by searching for it in the field select list.
   b) Select Create New Field In Bronto in the field select list.
   c) Enter a field Name. Your contacts will not see the Name entered. It is an internal designation only.
   d) Enter a field Label to display to contacts.
   e) Enter a field Type. This should be the same data type as the matching Demandware field. For example, if the Demandware attribute is a date, you need to map it to a date-based contact field.
   f) Set visibility as Private or Public. Private fields are visible only to you and Public fields can be made visible to your contacts.
   g) Click Create new Field.

8. When you have finished configuration for all of the import settings on the Contacts page, click Save Changes.

Configure Demandware Connector Opt-Ins Module

You can use the Demandware Connector Opt-In Module to allow Bronto to import subscriber status.

This module will only import custom objects created by the EmailOptin.ds pipelet. If a contact has opted in, the contact will import with an onboarding status. If a contact has opted out, the contact will import with an unsubscribed status.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click the Opt-Ins tab.
4. Set Enabled to Yes.
5. Configure the import schedule. This import schedule sets how often Bronto will check for new data from Demandware. For imports to work, the Bronto Jobs Runner job must also be enabled and scheduled with a recurring interval in Demandware.
   a) Click Advanced options.
   b) Under Frequency, select how often you want imports to run.
   c) If you selected Minute Intervals for Frequency, select a number of minutes from the Interval list. If you select 30, then the import will run every 30 minutes.
   d) Select a Start Time for the first interval of the day.
   e) Pick the Days when your import should run. The import will run at the interval frequency you have set on each day you have checked.
6. You can also add imported Demandware opt-ins to Bronto lists during import. Select an existing list at Add Opt-Ins to Lists. If you want to add opt-ins to more than one list, repeat this step. You can remove a list by clicking on the list label.

7. You can also create a new Bronto list by selecting the Create New List in Bronto option from the Add Opt-Ins to Lists drop down.
   a) When the Create New List in Bronto screen pops up, enter your list Name and list Label.

8. Optional: By default, opt-ins will remain on their assigned list even if their status changes in Bronto and they opt-out. Click Remove Opt-Outs from Lists to make it so that these opt-ins get removed from their assigned list(s) when they opt-out.

9. Optional: You also have the option of mapping fields and source values. Click Create New and select either Field Mapping or Source Mapping.
   a) For Field Mapping, first add a Name for your mapping.
   b) Enter the Demandware Form ID where the attribute will be made available (Example: dwcontactform.birthday).
   c) Select the corresponding Bronto Field from the drop down.
   d) Click Save to create the mapping.
   a) For Source Mapping, first add a Source name. This field is case sensitive and must match the source you set in EmailOptin.ds in Demandware Example: source value "footer" is assigned to "Footer Opt-in List").
   b) Under Add to Lists select the list that opt-ins with this source value should get added to.
   c) Click Save to create the mapping.

10. When you have finished configuration for all of the import settings on the Opt-Ins page, click Save Changes before advancing to any other Demandware Connector modules.

Configure Demandware Connector Orders Module

The Demandware Order Data Imports Connector lets you import your order data from Demandware into Bronto.

Once your order data is in Bronto you can use it when sending transactional or marketing messages. If you import orders with a processed status, you can also view RFM metrics related to your orders within Bronto.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Orders.
4. Set Enabled to Yes.
5. To set the import schedule:
   a) Click Advanced Options.
   b) Select how often you want imports to run from the Frequency list.
      By default imports are run in 1,000 record batches, so the frequency also determines the maximum number of records Bronto will attempt to import in a day. For example, if you set Frequency to Daily, the maximum number of record imports in a day will be 1,000. Inversely, if you set Frequency to once every hour, the maximum number of imports is 24,000 per day.
   c) Optional: If you selected Minute Intervals, select a number of minutes from the Interval list.
      For example, if you select 30, imports will run at 30 minute intervals. We recommend 1 minute for the initial sync, and 15 minutes after that.
   d) Set a Start Time.
   e) Set an End Time.
      If you selected daily, you will not see an option to set an End Time.
   f) In the Days section, select which days of the week you want imports to run.
      If a day box has a check mark, the import will run on this day at the interval frequency you set.
6. Add the Demandware order statuses you want to import to the Orders to Import box. By default, Completed, New, and Open order statuses are included. Orders that have a status that matches any of these statuses will be
imported. You should check in Demandware to see if you are using any additional order statuses. If you're using a 3rd party fraud prevention service or payment service like PayPal, it is very likely that you have an additional order status.

An order status can be removed from the list by clicking the icon on a status.

7. Select the Demandware order status you want used to determine that an order should be removed from Bronto from the **Orders to Delete** list. Cancelled is selected by default because it is the most common order statuses used by Demandware. Example other statuses include Refunded, Rejected or Declined. Orders that have a status that matches any of these statuses will be skipped for import or deleted from Bronto's order table if an order status changed to a matching status set for deletion.

You might want to remove an order from Bronto in order to clean up your RFM metrics. An order status can be removed from the list by clicking the icon on a status.

8. Select the Demandware **Confirmation Status** that an order must have for it to be imported. The order must match both an **Orders to Import** status and the **Confirmation Status**.

9. Select whether you want imported orders to have a **Pending** or **Processed** status in the **Bronto Order Status** list.

   This option is only available if your account uses order service. Bringing orders in as **Processed** will include the order totals in the RFM metrics and trigger any active workflows that begin with the Order Is Added trigger node. If set to **Pending** the RFM metrics will not be calculated for these orders until they are marked as **Processed**.

10. Select whether you want to import the Demandware **Long Description** or **Short Description** from the **Product Description** list. Bronto only stores one description field so you must select which one you want to use in Bronto.

11. Enter the Demandware image type you want to import and use as the Bronto image in the **Image View Type** box. You must select an image size that matches a configured image size in Demandware. **medium** is the default but you should use the image size that works best for you.

   If you use Demandware's Dynamic Imaging Service (DIS), refer to the Advanced Options.

   If you’re using a 3rd party CDN for product images, the connector will not support images natively, but additional development work can be done in Demandware to accommodate the 3rd party CDN

12. If you want to map a Demandware order line item attribute to Bronto's **Other** order field: select the line item attribute from the **Other Field** list.
   a) Click **Select**.
   b) Click on the Demandware product field you want to map in the list.
   c) Click **Confirm**.

13. When you have finished configuration for all of the import settings on the Orders page, click **Save Changes**.

### Configure Demandware Connector Messages Module

You can use the Demandware Connector to send any available Demandware messages out of Bronto. In order to leverage this module, the appropriate pipelets must be in Demandware to trigger a mapped message.

By default, all message Send Types are set to Demandware, which means that the message and settings are managed in Demandware. However, you can configure any send type to be a Bronto Marketing or a Bronto Transactional send. If a Bronto send type is selected, a Bronto email must be associated with the send. Then, when the send is triggered in Demandware, the Demandware Connector will send the message from Bronto using the sender options selected.

1. Go to **Apps > Connector**.
2. Locate the connector you want to work with and click its **Edit** link.
3. Click **Messages**.
4. Enter the **From Name** for all messages sent out via the Message module.
5. Enter the **From Email** for all messages sent out via the Message module.
6. Enter the email address for all replies to messages sent out via the Message module in the **Reply-To Email** box.
7. Select the combination of advanced sending options you want to apply from the **Send Flags** list.

   Options you can set include:
• **Sender Authentication** will sign your email message with DomainKeys/DKIM. DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email. This digital signature is verified by the receiving mail server to ensure that the email is not forged. We recommend using Sender Authentication.

• **Fatigue Override**. Setting this to Yes will send an email to a contact even when it would exceed the email frequency cap you designated for your contacts.

• **Reply Tracking** will store a copy of all email replies to your email messages on the Email Replies page.

8. Enter the Demandware image type you want to import and use as the Bronto image in the Image View Type box. You must select an image size that matches a configured image size in Demandware. *medium* is the default but you should use the image size that works best for you.

If you use Demandware's Dynamic Imaging Service (DIS), refer to the Advanced Options.

If you’re using a 3rd party CDN for product images, the connector will not support images natively, but additional development work can be done in Demandware to accommodate the 3rd party CDN.

9. Optional: If you want to provide a default, static value to use in messages when there isn’t contact field data for a contact in Bronto's database enter this in the Customer Name and Customer First Name boxes.

When you provide a Customer Name or Customer First Name these values will be used by Bronto during message send when the name or first name contact field is blank. Therefore, if you choose to provide this information it is important that the values you enter are generic enough to apply to any of your contacts (Example: Valued Customer).

10. Configure what message types will be sent through Bronto. These settings will only work if you have already configured the relevant pipelets in Demandware (defined in your Bronto integration document). By default, the Bronto Demandware Connector will send standard Demandware messages including Order Confirmation, Reset Password, Password Changed, Account Locked, Gift Certificate, Contact Us, and Send to Friend (Product, Gift Registry, Wishlist, Product List). If you do not want to send a message type from Bronto, leave the type mapped to Demandware.

11. Locate the message type you want to send. You will need to configure each Demandware message type separately.

   a) Select Bronto Marketing or Bronto Transactional for the Send Type. If you plan to use Demandware to send your messages, there is no need to configure anything else in Bronto. If you plan to send as Bronto Marketing or Bronto Transactional, you will need to associate a Bronto message with that message send type.

   b) Select a Bronto message to send in the Message drop down. If you selected Bronto Transactional for your message type, you will need to make sure that your message has transactional approval from the Bronto deliverability team. For more information, see Request Transactional Message Approval. When building your messages, you can reference the lists of standard message variables and order confirmation message variables.

   c) Optional: Select a Demandware recommendation from the Recommendation list to use with your message. This is not a Bronto recommendation. See Configure Demandware Connector Recommendations.

   Recommendations supply product data for a message based on the results of the recommendation selected. You will need to add the appropriate API tags to the message in order to pull the recommendations in. The recommendations available in this list are configured in the Recommendations Module.

   d) Optional: Select a Demandware coupon to dynamically insert into your message. This is not a Bronto coupon and needs to be configured in Demandware. To add a coupon, click Select and select the Demandware coupon ID to use. For more information see Configure Demandware Connector Coupons Module on page 1270.

   e) Optional: If you want to use different sending options than the default options, click Advanced Options and enter your sending options.

12. Locate the message you want to configure and repeat the previous steps, as required, until you have configured all of the messages that will be managed by the Connector.

13. You can also create a new Custom Message using the Custom Message pipelet. Some commonly mapped custom messages include Back-in-Stock or Shipped Notifications. Another popular use of Custom Messages is to create language specific messages.

   Note: In order to leverage Custom Messages, the CustomMessage pipelet must be in place in Demandware to trigger a mapped message in the Demandware Connector Messages Module. Refer to the documentation included in the Bronto cartridge archive for more information.
Integrate

a) Click **Create New Message** on the bottom of the Connect Messages module page.
b) Name your message (Example: Back-in-Stock).
c) Select a Bronto Send Type.
d) Follow steps 11b-11e above to configure your message.
e) Click **Save** to save your new message.
f) Click the pencil icon to edit your newly created message in Connector.
g) Copy the ID of the message. You can change the message ID by clicking on the current ID and entering a new message ID. You will add this message ID to the Custom Message pipelet in Demandware to complete the mapping.
h) Click **Save** to create the custom message mapping.

14. When you have finished configuration for all message settings on the Messages page, click **Save Changes**.

**Demandware System Message Variables**

You can add variable tags to standard Demandware messages.

API message tags are user defined tags that allow you to insert HTML content into the body and subject line of Demandware messages. The content you add using API message tags will be added to the message at send time. These tags are used to sync content from your Demandware system (Account URL, Product Name, etc.) with messages you send in the Bronto application.

Note: These tags are only available if the variable placeholder exists in the Bronto created message.

**Table 26: Demandware email variable tags available in all Demandware messages**

<table>
<thead>
<tr>
<th>Demandware Message</th>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available in All Messages</td>
<td>%%#siteName%%</td>
<td>Demandware storefront name</td>
</tr>
<tr>
<td></td>
<td>%%#siteURL%%</td>
<td>Demandware production URL</td>
</tr>
</tbody>
</table>

**Table 27: System messages and their available email variable tags**

<table>
<thead>
<tr>
<th>Demandware Message</th>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Locked, Password Changed</td>
<td>%%#accountUrl%%</td>
<td>Account URL</td>
</tr>
<tr>
<td></td>
<td>%%#custCompany%%</td>
<td>Customer company</td>
</tr>
<tr>
<td></td>
<td>%%#custEmail%%</td>
<td>Customer email address</td>
</tr>
<tr>
<td></td>
<td>%%#custFirstName%%</td>
<td>Customer first name</td>
</tr>
<tr>
<td></td>
<td>%%#custLastName%%</td>
<td>Customer last name</td>
</tr>
<tr>
<td></td>
<td>%%#custName%%</td>
<td>Customer first and last names separated by a space</td>
</tr>
<tr>
<td></td>
<td>%%#custSalutation%%</td>
<td>Customer salutation</td>
</tr>
<tr>
<td></td>
<td>%%#custSecondName%%</td>
<td>Customer middle name</td>
</tr>
<tr>
<td></td>
<td>%%#custSuffix%%</td>
<td>Customer suffix</td>
</tr>
<tr>
<td></td>
<td>%%#custTitle%%</td>
<td>Customer title</td>
</tr>
<tr>
<td>Reset Password</td>
<td>%%#accountUrl%%</td>
<td>Account URL</td>
</tr>
<tr>
<td></td>
<td>%%#custCompany%%</td>
<td>Customer company</td>
</tr>
<tr>
<td></td>
<td>%%#custEmail%%</td>
<td>Customer email address</td>
</tr>
<tr>
<td></td>
<td>%%#custFirstName%%</td>
<td>Customer first name</td>
</tr>
<tr>
<td>Demandware Message</td>
<td>Variable Tag Name</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>%%#custLastName%%</td>
<td>Customer last name</td>
<td></td>
</tr>
<tr>
<td>%%#custName%%</td>
<td>Customer first and last names separated by a space</td>
<td></td>
</tr>
<tr>
<td>%%#custSalutation%%</td>
<td>Customer salutation</td>
<td></td>
</tr>
<tr>
<td>%%#custSecondName%%</td>
<td>Customer middle name</td>
<td></td>
</tr>
<tr>
<td>%%#custSuffix%%</td>
<td>Customer suffix</td>
<td></td>
</tr>
<tr>
<td>%%#custTitle%%</td>
<td>Customer title</td>
<td></td>
</tr>
<tr>
<td>%%#resetToken%%</td>
<td>Reset token</td>
<td></td>
</tr>
<tr>
<td>%%#resetUrl%%</td>
<td>Reset URL</td>
<td></td>
</tr>
<tr>
<td>Contact Us</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td>This will also have any additional custom specified in your contactus.xml form</td>
<td></td>
</tr>
<tr>
<td>%%#comment%%</td>
<td>Comment</td>
<td></td>
</tr>
<tr>
<td>%%#email%%</td>
<td>Email address</td>
<td></td>
</tr>
<tr>
<td>%%#firstname%%</td>
<td>First name</td>
<td></td>
</tr>
<tr>
<td>%%#lastname%%</td>
<td>Last name</td>
<td></td>
</tr>
<tr>
<td>%%#myquestion%%</td>
<td>My question</td>
<td></td>
</tr>
<tr>
<td>%%#ordernumber%%</td>
<td>Order number</td>
<td></td>
</tr>
<tr>
<td>%%#phone%%</td>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Gift Certificate Received</td>
<td></td>
<td></td>
</tr>
<tr>
<td>%%#giftAmount%%</td>
<td>Gift amount</td>
<td></td>
</tr>
<tr>
<td>%%#giftCode%%</td>
<td>Gift code</td>
<td></td>
</tr>
<tr>
<td>%%#giftDesc%%</td>
<td>Gift description</td>
<td></td>
</tr>
<tr>
<td>%%#giftMessage%%</td>
<td>Gift message</td>
<td></td>
</tr>
<tr>
<td>%%#recipientEmail%%</td>
<td>Recipient email address</td>
<td></td>
</tr>
<tr>
<td>%%#recipientName%%</td>
<td>Recipient name</td>
<td></td>
</tr>
<tr>
<td>%%#senderName%%</td>
<td>Sender name</td>
<td></td>
</tr>
<tr>
<td>Send to a Friend - Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td>This will also include any additional custom fields specified in the sendtofriend.xml form</td>
<td></td>
</tr>
<tr>
<td>%%#friendsemail%%</td>
<td>Friend's email address</td>
<td></td>
</tr>
<tr>
<td>%%#friendsname%%</td>
<td>Friend's name</td>
<td></td>
</tr>
<tr>
<td>%%#message%%</td>
<td>Message</td>
<td></td>
</tr>
<tr>
<td>%%#productDesc%%</td>
<td>Product description</td>
<td></td>
</tr>
<tr>
<td>%%#productId%%</td>
<td>Product ID</td>
<td></td>
</tr>
<tr>
<td>%%#productImgUrl%%</td>
<td>Product image URL</td>
<td></td>
</tr>
<tr>
<td>%%#productName%%</td>
<td>Product name</td>
<td></td>
</tr>
<tr>
<td>%%#productOpts%%</td>
<td>Comma separated list of product options and their values</td>
<td></td>
</tr>
<tr>
<td>%%#productPrice%%</td>
<td>Product price</td>
<td></td>
</tr>
<tr>
<td>%%#productUrl%%</td>
<td>Product URL</td>
<td></td>
</tr>
<tr>
<td>Demandware Message</td>
<td>Variable Tag Name</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>%%#productVars %</td>
<td>Comma separated list of product variation attributes</td>
<td></td>
</tr>
<tr>
<td>%%#subject%%</td>
<td>Subject</td>
<td></td>
</tr>
<tr>
<td>%%#yourname%%</td>
<td>Your name</td>
<td></td>
</tr>
<tr>
<td>Send to a Friend - Wish List, Gift Registry, Product List</td>
<td>%</td>
<td>Co-registrant's email address</td>
</tr>
<tr>
<td>Note: This will also include any additional custom fields specified in the sendtofriend.xml form.</td>
<td>%</td>
<td>Co-registrant's first name</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Co-registrant's last name</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Co-registrant's role</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Description</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Event city</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Event country</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Event date</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Event state</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Event type</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Send to a Friend email address</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Send to a Friend name</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Message</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Name of product list</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Product list ID</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Registrant's Email</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Registrant's First Name</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Registrant's Last Name</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Registrant's role</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping address 1</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping address 2</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping city</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Combined shipping address</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping company</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping country</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping first name</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping first and last name separate by a space</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping job title</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping last name</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>Shipping phone number</td>
</tr>
<tr>
<td>Demandware Message</td>
<td>Variable Tag Name</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>%%%#shipPostalCode%%</td>
<td>Shipping postal code</td>
<td></td>
</tr>
<tr>
<td>%%%#shipPostBox%%</td>
<td>Shipping postal box</td>
<td></td>
</tr>
<tr>
<td>%%%#shipSalutation%%</td>
<td>Shipping salutation</td>
<td></td>
</tr>
<tr>
<td>%%%#shipSecondName%%</td>
<td>Shipping second name</td>
<td></td>
</tr>
<tr>
<td>%%%#shipState%%</td>
<td>Shipping state</td>
<td></td>
</tr>
<tr>
<td>%%%#shipSuffix%%</td>
<td>Shipping suffix</td>
<td></td>
</tr>
<tr>
<td>%%%#shipSuite%%</td>
<td>Shipping suite</td>
<td></td>
</tr>
<tr>
<td>%%%#shipTitle%%</td>
<td>Shipping title</td>
<td></td>
</tr>
<tr>
<td>%%%#subject%%</td>
<td>Email subject</td>
<td></td>
</tr>
<tr>
<td>%%%#yourname%%</td>
<td>Your name (sender's email)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Product List: Product line items</td>
<td></td>
</tr>
<tr>
<td>%%%#productPriority_#%%%</td>
<td>Product priority</td>
<td></td>
</tr>
<tr>
<td>%%%#productQty_#%%%</td>
<td>Product quantity</td>
<td></td>
</tr>
<tr>
<td>%%%#productQtyPurch_#%%%</td>
<td>Product quantity purchased</td>
<td></td>
</tr>
<tr>
<td>%%%#productId_#%%%</td>
<td>Product ID</td>
<td></td>
</tr>
<tr>
<td>%%%#productVars_#%%%</td>
<td>Product variables</td>
<td></td>
</tr>
<tr>
<td>%%%#productOpts_#%%%</td>
<td>Product options (for configurable products)</td>
<td></td>
</tr>
<tr>
<td>%%%#productName_#%%%</td>
<td>Product name</td>
<td></td>
</tr>
<tr>
<td>%%%#productUrl_#%%%</td>
<td>Product URL</td>
<td></td>
</tr>
<tr>
<td>%%%#productDesc_#%%%</td>
<td>Product description</td>
<td></td>
</tr>
<tr>
<td>%%%#productImgUrl_#%%%</td>
<td>Product image URL</td>
<td></td>
</tr>
<tr>
<td>%%%#productPrice_#%%%</td>
<td>Product price</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Product List: Product list owner customer information</td>
<td></td>
</tr>
<tr>
<td>%%%#accountUrl%%</td>
<td>Account URL</td>
<td></td>
</tr>
<tr>
<td>%%%#custCompany%%</td>
<td>Customer company</td>
<td></td>
</tr>
<tr>
<td>%%%#custEmail%%</td>
<td>Customer email address</td>
<td></td>
</tr>
<tr>
<td>%%%#custFirstName%%</td>
<td>Customer first name</td>
<td></td>
</tr>
<tr>
<td>%%%#custLastName%%</td>
<td>Customer last name</td>
<td></td>
</tr>
<tr>
<td>%%%#custName%%</td>
<td>First and last name with a space in between</td>
<td></td>
</tr>
<tr>
<td>%%%#custSalutation%%</td>
<td>Customer salutation</td>
<td></td>
</tr>
<tr>
<td>%%%#custSecondName%%</td>
<td>Customer middle name</td>
<td></td>
</tr>
<tr>
<td>%%%#custSuffix%%</td>
<td>Customer suffix</td>
<td></td>
</tr>
<tr>
<td>%%%#custTitle%%</td>
<td>Customer title</td>
<td></td>
</tr>
</tbody>
</table>
Table 28: Demandware specific features and their available email variable tags

<table>
<thead>
<tr>
<th>Feature</th>
<th>Variable Tag Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Recommendations</td>
<td>%%%#couponCode%%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productId_rec_#%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productVars_rec_#%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productOpts_rec_#%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productName_rec_#%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productUrl_rec_#%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productDesc_rec_#%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productImgUrl_rec_#%%</td>
</tr>
<tr>
<td></td>
<td>%%%#productPrice_rec_#%%</td>
</tr>
</tbody>
</table>

Note: Demandware created product recommendations can be passed along to Bronto to be used in an email message. This requires the use of API Loop.

Demandware Order Confirmation Message Variables

You can include the following order information variable tags in order confirmation messages.

API message tags are user defined tags that allow you to insert HTML content into the body and subject line of Demandware messages. The content you add using API message tags will be added to the message at send time. These tags are used to sync content from your Demandware system (Account URL, Product Name, etc.) with messages you send in the Bronto application.

Table 29: Billing and address messages variables

<table>
<thead>
<tr>
<th>Variable Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%%#orderShippingDiscount%%</td>
<td>Amount of discount applied to shipping</td>
</tr>
<tr>
<td>%%%#billAddress1%%</td>
<td>Billing address line 1</td>
</tr>
<tr>
<td>%%%#billCombinedAddress%%</td>
<td>Billing address line 1 + line 2 (if available))</td>
</tr>
<tr>
<td>%%%#billAddress2%%</td>
<td>Billing address line 2</td>
</tr>
<tr>
<td>%%%#billCity%%</td>
<td>Billing city</td>
</tr>
<tr>
<td>%%%#billCompany%%</td>
<td>Billing company name</td>
</tr>
<tr>
<td>%%%#billCountry%%</td>
<td>Billing country</td>
</tr>
<tr>
<td>%%%#billFullName%%</td>
<td>Billing first and last name separated by a space</td>
</tr>
<tr>
<td>%%%#billFirstName%%</td>
<td>Billing first name</td>
</tr>
<tr>
<td>%%%#billJobTitle%%</td>
<td>Billing job title</td>
</tr>
<tr>
<td>%%%#billLastName%%</td>
<td>Billing last name</td>
</tr>
<tr>
<td>%%%#billPhone%%</td>
<td>Billing phone number</td>
</tr>
<tr>
<td>%%%#billPostBox%%</td>
<td>Billing post box</td>
</tr>
<tr>
<td>%%%#billPostalCode%%</td>
<td>Billing postal/zip code</td>
</tr>
<tr>
<td>%%%#billSalutation%%</td>
<td>Billing salutation</td>
</tr>
<tr>
<td>%%%#billSecondName%%</td>
<td>Billing second/middle name</td>
</tr>
<tr>
<td>%%%#billState%%</td>
<td>Billing state</td>
</tr>
<tr>
<td>Variable Tag Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>%%#billSuffix%%</td>
<td>Billing suffix</td>
</tr>
<tr>
<td>%%#billSuite%%</td>
<td>Billing suite number</td>
</tr>
<tr>
<td>%%#billTitle%%</td>
<td>Billing title</td>
</tr>
<tr>
<td>%%#couponCode%%</td>
<td>Demandware coupon code, if specified</td>
</tr>
<tr>
<td>%%#creditCardType%%</td>
<td>Credit card type (Visa, American Express, etc.)</td>
</tr>
<tr>
<td>%%#custCompany%%</td>
<td>Customer company name</td>
</tr>
<tr>
<td>%%#custEmail%%</td>
<td>Customer email</td>
</tr>
<tr>
<td>%%#custFirstName%%</td>
<td>Customer first name</td>
</tr>
<tr>
<td>%%#custLastName%%</td>
<td>Customer last name</td>
</tr>
<tr>
<td>%%#custSalutation%%</td>
<td>Customer salutation</td>
</tr>
<tr>
<td>%%#custSecondName%%</td>
<td>Customer second/middle name</td>
</tr>
<tr>
<td>%%#custSuffix%%</td>
<td>Customer suffix</td>
</tr>
<tr>
<td>%%#custTitle%%</td>
<td>Customer title</td>
</tr>
<tr>
<td>%%#siteName%%</td>
<td>Demandware storefront name</td>
</tr>
<tr>
<td>%%#creditCardAmount%%</td>
<td>First credit card amount</td>
</tr>
<tr>
<td>%%#expirationMonth%%</td>
<td>First credit card expiration month</td>
</tr>
<tr>
<td>%%#expirationYear%%</td>
<td>First credit card expiration year</td>
</tr>
<tr>
<td>%%#creditCardHolder%%</td>
<td>First credit card holder name</td>
</tr>
<tr>
<td>%%#giftCertificateAmount%%</td>
<td>First gift certificate amount</td>
</tr>
<tr>
<td>%%#giftCertificateCode%%</td>
<td>First gift certificate code</td>
</tr>
<tr>
<td>%%#custName%%</td>
<td>First name and last name separated by a space</td>
</tr>
<tr>
<td>%%#orderGrandTotal%%</td>
<td>Grand total of the order</td>
</tr>
<tr>
<td>%%#maskedCreditCard%%</td>
<td>Masked credit card number (Last 4 digits visible)</td>
</tr>
<tr>
<td>%%#merchDiscWithShip%%</td>
<td>Merchandise and shipping discounts</td>
</tr>
<tr>
<td>%%#merchDiscount%%</td>
<td>Merchandise discounts</td>
</tr>
<tr>
<td>%%#combinedDiscWithShip%%</td>
<td>Order and merchandise and shipping discounts</td>
</tr>
<tr>
<td>%%#combinedDiscount%%</td>
<td>Order and merchandise discounts</td>
</tr>
<tr>
<td>%%#orderDiscWithShip%%</td>
<td>Order and shipping discounts</td>
</tr>
<tr>
<td>%%#orderDate%%</td>
<td>Order date MM/dd/yyyy</td>
</tr>
<tr>
<td>%%#orderLongDate%%</td>
<td>Order date MMM/dd/yyyy</td>
</tr>
<tr>
<td>%%#orderDiscount%%</td>
<td>Order level discounts</td>
</tr>
<tr>
<td>%%#orderTime%%</td>
<td>Order time h:mm a</td>
</tr>
<tr>
<td>%%#shipAddress1%%</td>
<td>Shipping address line 1</td>
</tr>
<tr>
<td>%%#shipCombinedAddress%%</td>
<td>Shipping address line 1 and Line 2 (if available)</td>
</tr>
<tr>
<td>Variable Tag Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>%%#shipAddress2%%</td>
<td>Shipping address line 2</td>
</tr>
<tr>
<td>%%#shipCity%%</td>
<td>Shipping city</td>
</tr>
<tr>
<td>%%#shipCompany%%</td>
<td>Shipping company name</td>
</tr>
<tr>
<td>%%#shipCountry%%</td>
<td>Shipping country</td>
</tr>
<tr>
<td>%%#shipFullName%%</td>
<td>Shipping first and last name separated by a space</td>
</tr>
<tr>
<td>%%#shipFirstName%%</td>
<td>Shipping first name</td>
</tr>
<tr>
<td>%%#shipJobTitle%%</td>
<td>Shipping job title</td>
</tr>
<tr>
<td>%%#shipLastName%%</td>
<td>Shipping last name</td>
</tr>
<tr>
<td>%%#shipMethod%%</td>
<td>Shipping method</td>
</tr>
<tr>
<td>%%#shipPhone%%</td>
<td>Shipping phone number</td>
</tr>
<tr>
<td>%%#shipPostBox%%</td>
<td>Shipping post box</td>
</tr>
<tr>
<td>%%#shipPostalCode%%</td>
<td>Shipping postal/zip code</td>
</tr>
<tr>
<td>%%#shipSalutation%%</td>
<td>Shipping salutation</td>
</tr>
<tr>
<td>%%#shipSecondName%%</td>
<td>Shipping second/middle name</td>
</tr>
<tr>
<td>%%#shipState%%</td>
<td>Shipping state</td>
</tr>
<tr>
<td>%%#shipSuffix%%</td>
<td>Shipping suffix</td>
</tr>
<tr>
<td>%%#shipSuite%%</td>
<td>Shipping suite number</td>
</tr>
<tr>
<td>%%#shipTitle%%</td>
<td>Shipping title</td>
</tr>
<tr>
<td>%%#orderSubtotal%%</td>
<td>Subtotal of the order</td>
</tr>
<tr>
<td>%%#orderCurrency%%</td>
<td>The 3-letter currency code</td>
</tr>
<tr>
<td>%%#custNumber%%</td>
<td>The customer ID</td>
</tr>
<tr>
<td>%%#orderNumber%%</td>
<td>The order number</td>
</tr>
<tr>
<td>%%#orderShipping%%</td>
<td>Total shipping amount after discounts</td>
</tr>
<tr>
<td>%%#orderShippingNoDiscount%%</td>
<td>Total shipping with no discounts</td>
</tr>
<tr>
<td>%%#orderTax%%</td>
<td>Total tax on order</td>
</tr>
<tr>
<td>%%#accountUrl%%</td>
<td>URL to customer account</td>
</tr>
</tbody>
</table>

**Table 30: Payment message variables**

<table>
<thead>
<tr>
<th>Payment methods - Loop API tags Confirmation</th>
<th>Loop tags used for every payment method</th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#payAmount_#%%</td>
<td>Payment amount</td>
</tr>
<tr>
<td>%%#payBankHolder_#%%</td>
<td>Payment bank holder name (If available)</td>
</tr>
<tr>
<td>%%#payBankLicense_#%%</td>
<td>Payment bank license (if available)</td>
</tr>
<tr>
<td>%%#payBankNumber_#%%</td>
<td>Payment bank number (if available)</td>
</tr>
<tr>
<td>%%#payBankRouting_#%%</td>
<td>Payment bank routing number (if available)</td>
</tr>
<tr>
<td>%%#payCCExpMonth_#%%</td>
<td>Payment credit card expiration month (if available)</td>
</tr>
<tr>
<td><strong>Payment methods - Loop API tags Confirmation</strong></td>
<td><strong>Loop tags used for every payment method</strong></td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>%%#payCCExpYear_##%%</td>
<td>Payment credit card expiration year (if available)</td>
</tr>
<tr>
<td>%%#payCCHolder_##%%</td>
<td>Payment credit card holder name (if available)</td>
</tr>
<tr>
<td>%%#payCCNum_##%%</td>
<td>Payment credit card masked number (if available)</td>
</tr>
<tr>
<td>%%#payCCTYPE_##%%</td>
<td>Payment credit card type (if available)</td>
</tr>
<tr>
<td>%%#payGiftCode_##%%</td>
<td>Payment gift code (if available)</td>
</tr>
<tr>
<td>%%#payName_##%%</td>
<td>Payment name (credit card, PayPal, etc.)</td>
</tr>
</tbody>
</table>

Table 31: Gift and product message variables

<table>
<thead>
<tr>
<th><strong>Payment methods - Loop API tags Confirmation</strong></th>
<th><strong>Loop tags used for every payment method</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>%%#giftMessage_##%%</td>
<td>Gift message (if available)</td>
</tr>
<tr>
<td>%%#giftRecipientEmail_##%%</td>
<td>Gift recipient email (if available)</td>
</tr>
<tr>
<td>%%#giftRecipientName_##%%</td>
<td>Gift recipient name (if available)</td>
</tr>
<tr>
<td>%%#giftSenderName_##%%</td>
<td>Gift sender name (if available)</td>
</tr>
<tr>
<td>%%#productAdjPrice_##%%</td>
<td>Product adjusted price</td>
</tr>
<tr>
<td>%%#productAdjUPrice_##%%</td>
<td>Product adjusted unit price</td>
</tr>
<tr>
<td>%%#productDesc_##%%</td>
<td>Description of product (configurable in Connector to either Short or Long Description)</td>
</tr>
<tr>
<td>%%#productGrossPrice_##%%</td>
<td>Product unit pricing after taxes</td>
</tr>
<tr>
<td>%%#productId_##%%</td>
<td>Product ID/SKU</td>
</tr>
<tr>
<td>%%#productImgUrl_##%%</td>
<td>URL to product image (view type configurable in Connector)</td>
</tr>
<tr>
<td>%%#productName_##%%</td>
<td>Product name</td>
</tr>
<tr>
<td>%%#productNetPrice_##%%</td>
<td>Product unit pricing before taxes</td>
</tr>
<tr>
<td>%%#productOpts_##%%</td>
<td>Product options (comma separated)</td>
</tr>
<tr>
<td>%%#productPrice_##%%</td>
<td>Product unit price (Net or Gross depending on site settings)</td>
</tr>
<tr>
<td>%%#productProUPrice_##%%</td>
<td>Product prorated unit price</td>
</tr>
<tr>
<td>%%#productQuantity_##%%</td>
<td>Quantity of product ordered</td>
</tr>
<tr>
<td>%%#productSku_##%%</td>
<td>Product ID/SKU</td>
</tr>
<tr>
<td>%%#productTotalPrice_##%%</td>
<td>Product total price</td>
</tr>
<tr>
<td>%%#productUrl_##%%</td>
<td>URL to product</td>
</tr>
<tr>
<td>%%#productVars_##%%</td>
<td>Product variation attribute (Comma separated)</td>
</tr>
</tbody>
</table>

**Configure Demandware Connector Recommendations Module**

You can use the Demandware Connector to configure recommendations that can be used in Bronto messages or as content tags.
You will use this module to select recommendations that have already been created in Demandware. The recommendations available here are not Bronto Recommendations.

When selected on the Messages tab, a recommendation will supply product data for messages or content tags based on the results of the recommendation selected. You will need to add the appropriate API tags to the message in order to pull the recommendations in.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Recommendations.
4. Set Enabled to Yes.
5. Click Save Changes.
6. To set the import schedule:
   a) Click Advanced Options.
   b) Select how often you want imports to run from the Frequency list.
      By default imports are run in 1,000 record batches, so the frequency also determines the maximum number of records Bronto will attempt to import in a day. For example, if you set Frequency to Daily, the maximum number of record imports in a day will be 1,000. Inversely, if you set Frequency to once every hour, the maximum number of imports is 24,000 per day.
   c) Optional: If you selected Minute Intervals, select a number of minutes from the Interval list.
      For example, if you select 30, imports will run at 30 minute intervals. We recommend 1 minute for the initial sync, and 15 minutes after that.
   d) Set a Start Time.
   e) Set an End Time.
      If you selected daily, you will not see an option to set an End Time.
   f) In the Days section, select which days of the week you want imports to run.
      If a day box has a check mark, the import will run on this day at the interval frequency you set.
7. Click Create New and select Recommendation for Demandware Message to build a message recommendation.
   a) Enter a name for the recommendation in the Name box.
   b) Select the minimum number of items the recommendation needs to include from the Number of Items list.
   c) If you want to ensure specific products are always included as part of this recommendation:
      1. Click the Prioritized Products Select button.
      2. Click on the products you want to always include. If you want to remove a product you already selected, click on it again.
      3. Click Confirm.
   d) Select the Demandware recommendation you want to use to supply products from the Primary Type list.
   e) Select the Demandware recommendation you want to use to supply additional products from the Secondary Type list. This list is only used when the Primary Type and Prioritized Products do not yield enough results for a message.
   f) Select one of the default Demandware recommendations from the Fallback Sorting Rule list. This will supply products if all of the other sources of product recommendations have not returned the minimum Number of Items.
   g) If you want to ensure specific products are always excluded from this recommendation:
      1. Click the Excluded Products Select button.
      2. Click on the products you want to always exclude. If you want to remove a product you already selected, click on it again.
      3. Click Confirm.
   h) Enter the Demandware image type you want to import and use as the Bronto image in the ImageView Type box.
   i) Click Save.
8. Click Create New and select Recommendation for Bronto Content Tag to build a content tag recommendation.
   a) Enter a name for the recommendation in the Name box.
   b) Select the minimum number of items the recommendation needs to include from the Number of Items list.
   c) If you want to ensure specific products are always included as part of this recommendation:
      1. Click the Prioritized Products Select button.
      2. Click on the products you want to always include. If you want to remove a product you already selected, click on it again.
      3. Click Confirm.
   d) Select the Demandware recommendation you want to use to supply products from the Primary Type list.
   e) Select the Demandware recommendation you want to use to supply additional products from the Secondary Type list.
      This list in only used when the Primary Type and Prioritized Products do not yield enough results for a message.
   f) Select one of the default Demandware recommendations from the Fallback Sorting Rule list. This will supply products if all of the other sources of product recommendations have not returned the minimum Number of Items.
   g) If you want to ensure specific products are always excluded from this recommendation:
      1. Click the Excluded Products Select button.
      2. Click on the products you want to always exclude. If you want to remove a product you already selected, click on it again.
      3. Click Confirm.
   h) Enter the Demandware image type you want to import and use as the Bronto image in the Image View Type box.
   i) Provide the HTML code to be used as a design template for the product recommendations in the content tag in the Template box.
   j) Select the Bronto content tag to use the recommendation in from the Content tag list. You can create a new content tag by selecting Create New Content Tag in Bronto, entering a Name for the content tag, then clicking Create New Content Tag.
   k) Click Save.

9. Repeat steps 6 and/or 7, as necessary, to create more recommendations.

10. When you have finished configuring your recommendations, click Save Changes.

Configure Demandware Connector Coupons Module

You can use the Demandware Connector to style coupons that can be used with Demandware generated coupon codes.

The Coupon tab can be used to configure a coupon redirect link and the messages that will be displayed to contacts for each status of a coupon. This redirect link can be used with coupon codes generated using Demandware. It will not generate coupon codes.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click Coupons.
4. Set Enabled to Yes.
5. Optional: If you want to use a different query parameter than coupon in the URL for valid coupons, enter it in the Coupon Code Query Parameter box.
6. Optional: If you want to use a different query parameter than invalid_coupon in the URL for invalid coupons, enter it in the Invalid Coupon Query Parameter.
7. If you want to provide a notification for contacts when they try to use a coupon in your store set Display Message to Yes and configure the message for each type of message. The two major types of messages are Success Message and Failure Message.
• **Success Message** is used when the coupon was successfully added to the shopping session.
  • **Background Color**: Set the color of the message box.
  • **Text Color**: Set the color of your message text.
  • **Message**: Default message is "Coupon {code} was successfully applied to your basket."

• **Failure Message** is used when the coupon could not be applied.
  • **Background Color**: Set the color of the message box.
  • **Text Color**: Set the color of your message text.
  • **Message**: There are three different default failure messages:
    • **Invalid Message** is used when the coupon could not be added because it is invalid.
    • **Depleted Message** is used when the coupon pool has been used to completion.
    • **Expired Message** is used when the coupon has expired.

8. When you have finished configuring the **Coupons Module**, click **Save Changes**.

**Configure Demandware Connector Integrations Module**

The Demandware Connector can be used to supply data from Demandware to several Bronto apps, including Browse Recovery, Cart Recovery, Pop-Up Manager, and Coupon Manager.

Use the Demandware Connector to configure a connection between a Bronto app and Demandware. You need to purchase any Bronto app you are integrating with Demandware to fully leverage its functionality. You can integrate these Bronto apps with Demandware:

• Cart Recovery: This connection will use the cart and order data from your Demandware domain for the Cart Recovery data. You will need to configure the app at Bronto > Apps > Cart Recovery and create a relevant workflow for Cart Recovery to be fully functional. We recommended that you enable this script even if you have not purchased Cart Recovery because it sends order data to Bronto in near real time. Learn more about **Cart Recovery**.

• Browse Recovery: This connection will send browse related events from your Demandware site to the app. You will need to configure the Browse Recovery settings at Home > Settings > Browse and rules for the app at Bronto > Apps > Browse Recovery. Learn more about **Browse Recovery**.

• Pop-Up Manager: This connection will deploy your pop-ups to your Demandware domain. If you enable this, you should remove the embedded code snippet from your site if it is already configured. You will need to configure the app in Bronto > Apps > Pop-Up Manager and create and activate a pop-up for this integration to be fully functional. Learn more about **Pop-Up Manager**.

• Coupon Manager: This connection sends coupon redemption statistics for your Demandware site to Bronto. You will need to create and configure coupons at Bronto > Apps > Coupon Manager for the app to be fully functional. Learn more about **Cart Recovery**.

1. Go to Apps > Connector.
2. Locate the connector you want to work with and click its Edit link.
3. Click **Integrations**.
4. Find the app you want to use and set Enabled to Yes.
5. If you enabled Browse Recovery, you will need to configure the Browse Recovery capture points and settings at Apps > Browse Recovery.
6. If you enabled Cart Recovery, you will need to configure the app at Apps > Cart Recovery and create a relevant workflow for the integration to work. The Embed Code field should be automatically populated.
7. If you enabled Pop-Up Manager, enter the domain for your site in the Domain box.
8. If you enabled Coupon Manager, select whether you use a Server-Side Pipeline or Storefront JavaScript integration.
9. When you have finished configuring the **Integrations Module** settings, click **Save Changes**.

**Related Topics**

Capture Browse Data on page 1463
You can configure Bronto to capture browse data from your site. Browse data is information about which products your contacts view.

Embed Tag Manager Code On Your Site on page 1155
The Tag Manager custom embed code allows you to track cart and order activity on your site.

**Demandware Connector Advanced Module**

The Demandware Connector Advanced page provides several options you can use to tweak and/or test your connector settings.

Each option on this page is explained in the table below.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
</table>
| Test Mode                   | Enabling this turns off the exchange of data. You can use Test Mode if you are concerned there is a problem with the Connector or if you are testing and do not want to bring data from your development or staging environment into Bronto. Test Mode is enabled by default. Demandware Connector allows you to individually manage the different pieces of data:  
  - **Send Messages as Tests** Enabling this will send messages configured in the Message Module to contacts with active, onboarding or transactional status. This will allow you to test messages that may not yet be approved for transactional sending.  
  - **Disable Contact Import** Enabling this will turn off automated contact imports if you have enabled the Contacts Module. You can still use **Contact Import Tests** on the **Advanced** tab to test contact imports.  
  - **Disable Opt-In Import** Enabling this will turn off automated opt-in imports if you have enabled the Opt-Ins Module.  
  - **Disable Order Import** Enabling this will turn off automated order imports if you have enabled the Orders Module. You can still use **Order Import Tests** on the **Advanced** tab to test order imports.  
  - **Disable Content Tag Recommendations Import** Enabling this will turn off any Bronto Content Tag recommendations you may have configured.  

We recommend the following settings during testing.

- **Send Messages as Tests**: No  
- **Disable Contact Import**: Yes  
- **Disable Opt-In Import**: No  
- **Disable Order Import**: Yes  
- **Disable Content Tag Recommendations Import**: No

Note: To test Orders and Contacts, see the Order Import Test and Contact Import Test below.
<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooke Management</td>
<td>Enabling <strong>Transfer Cookies Across Sessions</strong> will allow cookies to transfer across your sites. This is especially important for sites with multiple storefronts that have a shopping cart persist across sites (Example: one site with tabs and a shared checkout process).</td>
</tr>
<tr>
<td>Service Timeouts</td>
<td>You can manually adjust timeout settings for various API processes:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Connector API (seconds)</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>Bronto API Connection (seconds)</strong> Number of seconds before an attempt to connect to Bronto's API will time out.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Bronto API Request (seconds)</strong> Number of seconds before an API request will time out.</td>
</tr>
<tr>
<td>Dynamic Imaging Service (DIS)</td>
<td>Dynamic Imaging Service (DIS) leverages Demandware image management functionality to create a default image view that can be applied to the images you import. To use this setting, you need to already be set up with Demandware's DIS. To create and use a default image view:</td>
</tr>
<tr>
<td></td>
<td>1. Set <strong>Use Dynamic Image Service</strong> to <strong>Enabled</strong>.</td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>Create New DIS View Type</strong> located under the Dynamic Imaging Service area.</td>
</tr>
<tr>
<td></td>
<td>3. Set the <strong>Width</strong> and <strong>Height</strong> you want to scale images to.</td>
</tr>
<tr>
<td></td>
<td>4. In the <strong>Scale mode</strong> list select <strong>Fit</strong> to scale images down to this size or <strong>Cut</strong> to crop images to this size.</td>
</tr>
<tr>
<td></td>
<td>5. Enter a name for the image type in the <strong>Name</strong> box. The name you use must match a Demandware pre-configured image type (icon, thumbnail, small, medium, large, hi-res).</td>
</tr>
<tr>
<td></td>
<td>This field is the <strong>Name</strong> you will provide in other areas of the Connector for the <strong>Image View Type</strong> when you want to use this image view.</td>
</tr>
<tr>
<td></td>
<td>6. Click <strong>Save</strong> to save the <strong>Image View Type</strong>.</td>
</tr>
<tr>
<td></td>
<td>7. When you have finished configuration for the DIS settings on the Advanced page, click <strong>Save Changes</strong>.</td>
</tr>
<tr>
<td></td>
<td>8. Update the <strong>Image View Type</strong> field with the name from step 4 on either the <strong>Orders</strong> or <strong>Messages</strong> tab.</td>
</tr>
<tr>
<td>Schedule Import</td>
<td>Manually runs an import so you can see if your import configuration settings will import data as expected. To kick off an import, select the import type from the list and click <strong>Execute</strong>. After you run a process you can view the results in the Execution Results area. Click <strong>View Results</strong> for a detailed report.</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Contact Import Test      | Tests the connection by searching for a contact in Demandware and optionally importing the contact in order to test that the data import is configured properly. To test contact imports:  
1. Select whether to search by **Email** or **Customer Number**.  
2. Enter either the email or customer number in the **Search For** box.  
3. Select whether or not you want to import this customer's data into Bronto as you test.  
4. Click **Execute**.  
5. Locate your import test in the Execution Results area and click **View Results** for a detailed report. |
| Order Import Test        | Tests the connection by searching for an order in Demandware and optionally importing the order in order to test that the data import is configured properly. To test order imports:  
1. Enter the order number in the **Order Number** box.  
2. Select whether or not you want to import this order data into Bronto as you test.  
3. Locate your import test in the Execution Results area and click **View Results** for a detailed report. |
| Reset Import Status      | Changes the import status in Demandware for orders or contacts that have a time stamp within a specified time range. You might want to use this to mark contacts or orders that have previously been imported to not imported so that you can update the data in Bronto using new connector settings. Or you might want to mark items that have not been imported as imported if you have a chunk of data in Demandware you know you don't want imported into Bronto. To reset the import status:  
1. Select the type of data you want to work with from the **Type to Reset** list.  
2. In the **Mark As Imported** list select **No** if you want to update the data so that Demandware does not recognize it as imported or **Yes** if you want to mark the data as imported.  
3. Use the Created After and Created Before calendars to establish a date range for the data you want to apply this change to.  
4. Click **Execute**.  
5. Locate your import test in the Execution Results area and click **View Results** for a detailed report. |
| Verify Installation      | Checks the connector installation details and provides a log in the Execution Results area that can be used to debug issues. Click **Execute** to run the installation verification. |
### Persado Predict

Persado Predict analyzes your subject lines and estimates how your subject lines are likely to perform with a predicted open rate uplift.

#### About Predict

Persado is a Natural Language Processing technology and Persado’s Predict is a standard part of the Bronto Marketing Platform. Predict analyzes your subject lines and finds similar ones within your industry or data sets. The powerful prediction algorithm then utilizes all the information gathered from the analysis—such as emotions and key words or phrases—to estimate how your subject lines are likely to perform with a predicted open rate uplift.

#### Related Topics

- **Effective Email Subject Lines** on page 203
  We've provided tips for writing subject lines that will catch reader's attention.

### Configure Data Exchange With Persado Predict

You can use an API token to upload your campaign history to Persado Predict.

You must create a free Persado account before you can configure Persado to integrate with Bronto.

You can upload your campaign history to help improve predictions.

1. In Bronto, go to **Home > Settings** and click **Data Exchange**.
2. Click the **Add Access Token** button.
   The **Create API Token** window opens.
3. Enter a name for the token.
4. For **Permissions and Settings**, select **Read**.
   Make sure the box next to **Token is active?** is checked.
5. Click **Save**.
   Your API Token is created and available to use. Copy your token.
6. In Persado, log in and go to **Settings**.
7. For **ESP Connections**, click **Add Bronto Connection**.
8. For **Bronto API Access Token**, paste the token you copied.
9. Name the connection.
10. Click **Add Connection**.
    You should now be able to see the connection on the **Settings** page.
11. Import your data into Persado Predict.
    a) On the Persado Predict Dashboard, click **Upload Data Set**.
    b) Click **I Want to Import from My ESP**.
    c) Click the Bronto connection.
    d) Select the Date Range for the history you want to import.
    e) Click **Next: Upload**.
    f) Name your data set.
       If you want this data set to be your default, check the box next to **Set as my default data set**.
    g) Choose what industry to compare your subject lines to.
    h) Click **Upload Data Set**.
Your Bronto campaign history is now uploaded to Persado Predict.

If you have questions about Predict, please see the Persado Help Documentation or contact Persado Support directly at gosupport@persado.com

**Use Predict**

When you are creating a subject line for a message, you can use Predict to help determine what subject line will be the most successful.

You must have a free Persado account before you can use Predict.

Persado Predict analyzes your subject line and predicts how it will perform.

**Note:** Predict will not work with dynamic subject lines.

1. Click the Persado button next to the subject line.
2. Log in to Persado.
3. Enter the subject line you want to use.
4. Select what industry you want to compare it to.
5. Select what data set you want to compare it to.
6. Click **Get Predictions**.
7. Repeat steps 3-6 until you get a subject line you like. Then, copy it and paste it into the subject line of your message.

If you have questions about Predict, please see the Persado Help Documentation or contact Persado Support directly at gosupport@persado.com

**Set Up/Edit SOAP API Access Tokens**

SOAP API Access Tokens allow you to manage access to our SOAP API.

You can grant basic permissions (read, write, and send), as well as activate and deactivate specific tokens.

To set up SOAP API Access Tokens:

1. Go to **Home > Settings > Data Exchange**.
2. Click **Add Access Token**.
3. Specify a name for the token in the API Token Name text box.
   You should specify a descriptive name for the token.
4. Click the checkboxes in the Permissions section that best describe the level of access you want for this token. Your options for SOAP API Access Token permissions are:
   - **Read Access** - Allow this token to read data from your account.
   - **Write Access** - Allow this token to write data and objects (such as fields, segments, contacts, etc.) to your account.
   - **Send Access** - Allow this token to schedule and send emails from this account.
5. Click the **Token is active** checkbox if you want to activate the token at this time.
   You can always come back and activate the token at a later time.
6. Click **Save**.

**REST API Integrations**

REST API integrations allow you to manage access to the Orders and Shopping Cart REST APIs.

You can grant read/write access to each API, as well as create and delete multiple integrations with different permissions.

**Create A REST API Integration**

You can set up a REST API integration in order to use our REST API to pass product and Order Service order data.

If you use Legacy Conversion Tracking, you will need to use Bronto's SOAP API to pass order data.

To create REST API Integration:

1. Go to **Home > Settings > Data Exchange**.
2. Click **Create a New Integration**.
   The **Edit REST Integration** page is displayed.
3. Add name for the integration in the **Client Name** text box.

4. In the **Permissions & Settings** section, click the checkboxes that describe the level of access you want for this integration. Your options for REST API integration permissions are:
   - **Orders Read** - Allows the integration to read Order Service order data from your account.
   - **Orders Write** - Allows the integration to write Order Service order data to your account.
   - **Campaigns Read** - Allows the integration to read campaign data from your account.
   - **Campaigns Write** - Allows the integration to write campaign data to your account.
   - **Carts Read** - Allows the integration to read cart data from your account.
   - **Carts Write** - Allows the integration to write cart data to your account.
   - **Products Read** - Allows the integration to read product data from your account.
   - **Products Write** - Allows the integration to write product data to your account.

5. Click **Save**.

The **Data Exchange** page is displayed. The **REST Integrations** section should contain a new gray box for the integration you just created. This box will contain the **ID** and **Secret** required to access the REST API.
Integrate

Edit A REST API Integration
You can edit an existing REST API integration.

To edit a REST API Integration:
1. Go to Home > Settings > Data Exchange.
2. In the REST Integrations section, click Edit Settings in the gray box representing the REST integration you want to edit.
3. Make any edits to the Client Name or Permissions & Settings.
For more information on what the Permissions & Settings mean, see Create A REST API Integration on page 1277.
4. Click Save.

The Data Exchange page is displayed. The REST Integrations section should contain a new gray box for the integration you just created. This box will contain the ID and Secret required to access the REST API.

Delete A REST API Integration
You can delete an existing REST API integration.

To delete a REST API Integration:
1. Go to Home > Settings > Data Exchange.
2. In the REST Integrations section, click Delete in the gray box representing the REST integration you want to delete.
3. Click OK.

SMS Integration Settings
The SMS integration allows you to view the SMS short code for your account and to view and configure the STOP and HELP responses your contacts will receive.

SMS and MMS opens a new channel through which you can engage your contacts. SMS messages are allocated independently of your regular email allocation. In order to purchase SMS messages, contact your account manager.

Setting up the SMS integration in your account allows you to send scheduled SMS deliveries to contacts subscribed to a keyword, and transactional SMS deliveries to contacts who text in to non-subscription keywords. For more information about subscription keywords, see SMS Keywords on page 259. For more information about creating and sending SMS messages see SMS.
For the most part, the STOP and HELP messages for your account cannot be edited. This is by design in order to ensure that these messages meet compliance standards. You can, and should, update the support contact information included in these messages to the support contact specific for your account. For HELP response messages only, you can also edit the alert text at the beginning of the message.

**Related Topics**

SMS

Schedule A Delivery Of An SMS or MMS Message on page 335

**Related Topics**

SMS

### Set Up The Support Contact Information For SMS

The support contact information is shown to your contacts when they text HELP or STOP to your short code.

You have the option of using the default support contact information, or adding your own custom support email and phone number.

To add custom support information for SMS:

1. Go to Home > Settings > SMS Integration.
2. In the Support URL text box, add a support URL.
3. In the Support Information text box, add a custom support email.
4. In the Support Phone # text box, add a custom support phone number.
5. Scroll to the bottom of the page, and click Save.

You can view a preview of the SMS message sent to contacts who text STOP to your short code in the Short Code Stop Messaging section. This message will contain any custom support information you added.
You can view a preview of the SMS message sent to contacts who text HELP to your short code in the **Short Code Help Reply** section. This message will contain any custom support information you added.
View The SMS Short Code Stop Message In Your Account

The SMS Short Code Stop Message is the SMS message sent to your contacts when they text STOP to your short code.

A contact can text stop back in one of three languages:

- English: STOP
- French: ARRET
- Norwegian: STOPP

and will receive the response that corresponds to that language. If a contact is subscribed to more than one SMS keyword they must text "STOP ALL" to unsubscribe from all SMS and/or MMS messages and "STOP <keyword>" to unsubscribe from a particular keyword. If they just text STOP then the contact will receive a response that contains all of the keywords they are subscribed to.

Most of the text in the STOP response message cannot be edited, but you can change the support contact information. When you change this, the new support contact information will be used in both the STOP and HELP messages. For more information see Set Up The Support Contact Information For SMS on page 1280.

To view the SMS Short Code Stop Message:

1. Go to Home > Settings > SMS Integration.
2. Scroll to the SMS Short Code Stop Messaging section.

The preview of the SMS Short Code Stop Messages are displayed.
Edit SMS Short Code Help Reply Message

The SMS Short Code Help Reply Message is sent to your contacts when they text HELP to your short code.

A contact can text help back in one of three languages:

- English: HELP
- French: AIDE
- Norwegian: HJELP

and will receive the response that corresponds to that language.

The application dynamically adds the support phone number, email address, help alert, and keyword frequency cap to the SMS Short Code Help Reply Message, but you can personalize the help alert text that appears before the rest of the message. You can also you can change the support contact information. When you change this, the new support contact information will be used in both the STOP and HELP messages. For more information see Set Up The Support Contact Information For SMS on page 1280.
Tip: You can view a preview of the SMS Short Code Help Reply Message in the Short Code Help Reply section.

To view and edit the SMS Short Code Help Reply Message:

1. Go to Home > Settings > SMS Integration.
2. Scroll down to the Short Code Help Messaging section.
3. If you want to
   - Use the default help alert, click the Use default help alert checkbox.
• Add a custom help alert, add the alert you want to use in the **Help alert** box.

When you add a custom alert, we do not translate the alert text in the **Help alert** box. It is appended to the SMS Message for all three languages as it is written.

4. Click **Save**.

## Set Up Your Account So You Can Post To Twitter

Integrating your account with a Twitter account allows you to post to Twitter.

This is not the same as tracking a Twitter username.

You can also trigger workflows when someone mentions a Twitter username you are tracking.

For more information on tracking a Twitter username, see [Track Twitter Usernames on page 1286](#).

To integrate your account with a Twitter account:

1. Go to **Home > Settings > Social Networks**.
2. Click **Add Twitter Integration**.

   If your Twitter login information is not cached, you will be taken to a Twitter page asking you to login to your Twitter account. Enter your Twitter username and password in the designated text boxes and click **Sign In**.

A grey box containing the username (aka handle) for the Twitter account will be created. At this point, Twitter access for that Twitter account is active.

You can view replies, retweets, and click metrics for the messages you post to Twitter. For more information on viewing these metrics, see [View Metrics About A Twitter Message on page 981](#).

**Related Topics**

- [View Metrics About A Twitter Message on page 981](#)
- [Create Twitter on page 250](#)
Track Twitter Usernames
When you track a Twitter username, anyone who mentions or retweets that username will be added to your account as a contact.

You can also trigger workflows when someone mentions a Twitter username you are tracking.

Tip: For more information on triggering a workflow when someone mentions a Twitter username you are tracking, see Use The Twitter Event Trigger Node In Workflows on page 362.

Note: You don't need to be integrated with a Twitter account in order to track a Twitter username. For more information on integrating with a Twitter account, see Set Up Your Account So You Can Post To Twitter on page 1285.

To add a Twitter username to track:

1. Go to Home > Settings > Social Networks.
2. In the Track Twitter Usernames section, add in the Twitter username you want to track in the Username text box.
3. Click Add.

Deactivate/Reactivate Posting For A Twitter Account
In some cases you may want to deactivate, or reactivate posting for a specific Twitter account.

You can only post to active Twitter accounts.

Note: Deactivating/reactivating a Twitter account does not affect Twitter usernames you are tracking. To delete Twitter usernames you are tracking, see Delete A Tracked Twitter Username on page 1287.

To deactivate/reactivate posting for a Twitter account:

1. Go to Home > Settings > Social Networks.
2. Find the Twitter account you want to deactivate/reactivate.
3. Click Edit Settings.
4. Either:
   - Uncheck the Enable Twitter Access checkbox to deactivate access to the Twitter account.
   - Check the Enable Twitter Access checkbox to reactivate access to the Twitter account.
5. Click Save.

Delete An Integrated Twitter Account From Your Account
In some cases, you may want to completely remove a Twitter account you have integrated with in your account.
Integrate

This is not the same as deactivating/reactivating posting for a Twitter account! Additionally, deleting a Twitter account does not affect Twitter usernames you are tracking. To delete Twitter usernames you are tracking, see Delete A Tracked Twitter Username on page 1287.

To delete a Twitter account from your account:

1. Go to Home > Settings > Social Networks.
2. Find the grey box associated with the Twitter account you want to delete.
3. Click Delete.
4. Click Ok.

Delete A Tracked Twitter Username

You can stop tracking a Twitter name.

This is not the same as deactivating/reactivating posting for a Twitter account or deleting an integrated Twitter account! For more information on deactivating/reactivating access for a Twitter account, or deleting an integrated Twitter account, see Deactivate/Reactivate Posting For A Twitter Account on page 1286 and Delete An Integrated Twitter Account From Your Account on page 1286.

To remove a Twitter Username:

1. Go to Home > Settings > Social Networks.
2. In the Track Twitter Usernames section, click Remove next to the Twitter username you want to remove.

Set Up Your Account So You Can Post To Facebook

Integrating your account with a Facebook account allows you to post messages to Facebook.

Note: If you use a private domain, you will need to use a custom Facebook app instead of Bronto's integration. For more information, see Post To Facebook Using A Custom Facebook App on page 1288.

Although not dependent on setting up the Facebook integration, you can also add a Facebook Like button to your email messages, map Facebook fields to fields in your account, and allow contacts to login using Facebook. For more information on adding a Facebook Like button to your email messages, see Insert A Facebook Like Button Using The WYSIWYG Editor on page 113. For more information on mapping Facebook fields to fields in your account, see Map Facebook Fields To Fields In Your Account on page 1289. For more information on allowing contacts to login using Facebook, see Allow Contacts To Login With Facebook on page 218.

To integrate your account with a Facebook account:

1. Go to Home > Settings > Social Networks.
2. Click Add Facebook Integration. You will be redirected to the Facebook login screen.
3. Enter the email address and password for the Facebook account you want to integrate with.
4. Click Login.
   You will be redirected back to the application.
5. Click Edit Settings in the Facebook Access box that was just created.
6. In the **Edit Facebook Authentication Status** light box, click the checkboxes next to walls, pages, and apps that can be posted to.

7. Click **Save**.

8. Log into the Facebook account that was used to set up the Facebook integration.

9. In Facebook, verify the Bronto app can:
   - Post on your behalf
   - Manage your pages
   - Publish as pages you manage

**Related Topics**

- *Insert A Facebook Like Button Using The WYSIWYG Editor* on page 113
- *Allow Contacts To Login With Facebook* on page 218
- *Create A Facebook Message* on page 251

**Post To Facebook Using A Custom Facebook App**

If you use a private domain, you will need to post to Facebook using your own custom Facebook app.

By default, your account is setup to post to Facebook using the Bronto Facebook app. If you use a private domain, you will need to post to Facebook using your own custom Facebook app. First, you need to create the app and then you will need to add the credentials for the app to the **Social Integration** page.

**Note:** Providing assistance creating custom Facebook apps is outside the scope of services provided by our support team.

To setup access for a custom Facebook app:

1. Get the **App ID** and **App Secret** for your app from Facebook.
2. Go to **Home > Settings > Social Networks**.
3. Click **Show App Information**.
4. Add the **App ID** in the **Facebook App ID** text box.
5. Add the **App Secret** in the **Facebook App Secret** text box.
6. Click **Add Facebook Integration**.
7. Log into the Facebook account that was used to set up the Facebook integration.
8. In Facebook, verify the Bronto app can:
   - Post on your behalf
• Manage your pages
• Publish as pages you manage

Map Facebook Fields To Fields In Your Account
You can map Facebook fields to Bronto fields in order to pull that data into Bronto.

Mapping Facebook fields to fields in your account allows you to populate fields in your account with data pulled from a contact's Facebook account when they click Login with Facebook from a webform.

❗ Note: You don't need to be integrated with a Facebook account in order to map Facebook fields to fields in your account. For more information on integrating with a Facebook account, see Set Up Your Account So You Can Post To Facebook on page 1287.

To map Facebook fields to fields in your account:
1. Go to Home > Settings > Social Networks.
2. Click Edit Mappings in the Mapped Facebook Fields section.
3. Click on the name of a field.
   You could also create a new field. For instructions on creating a new field and mapping it to a Facebook field, see Create Custom Contact Fields on page 562.
4. In the Edit Field light box, select which Facebook field you want to map this field to using the Facebook Field pull-down menu. You can select the following:
   • Biography
   • Birthday
   • Email
   • First Name
   • Last Name
   • Gender
   • Location
5. Click Save.

❗ Note: For Add Contacts, Look Up Contacts, and Manage Preferences webforms, we allow you to add a Login with Facebook link that lets contacts subscribe or edit their information using their Facebook login information. For more information on allowing contacts to login using Facebook, see Allow Contacts To Login With Facebook on page 218.

Related Topics
Create Custom Contact Fields on page 562
Reactivate Posting To A Facebook Account

If your Facebook account is deactivated, you can reactivate it.

If a problem occurs with a Facebook account you have integrated with, you will receive an in application alert.

To reactivate posting to a Facebook account:

1. Go to Home > Settings > Social Networks.
2. Find the Facebook account you want to reactivate posting to.
3. Click Fix Problem.

4. You can now follow the steps to reactivate posting to a Facebook account.
   For details on these instructions, see Set Up Your Account So You Can Post To Facebook on page 1287.

Deactivate Posting To A Facebook Account

In some cases you may want to deactivate posting to a Facebook account.

To deactivate/reactivate posting to a Facebook account:

1. Go to Home > Settings > Social Networks.
2. Find the Facebook account you want to deactivate posting to.
3. Click Edit Settings.

4. Uncheck the Enable Facebook Access checkbox to deactivate access to the Facebook account.
5. Click Save.

Deactivate/Reactivate Posting For A Facebook Page Or Wall

In some cases you may want to deactivate, or reactivate posting for a Facebook page or wall in a Facebook account you are integrated with.

To deactivate/reactivate posting for a page or wall:

1. Go to Home > Settings > Social Networks.
2. Find the Facebook account you want to deactivate/reactivate wall or page posting for.
3. Click Edit Settings.
4. Uncheck the checkbox associated with the wall or page you want to deactivate posting for.
   To reactivate posting for a wall or page, click the checkbox associated with that wall or page.
5. Click Save.

Delete An Integrated Facebook Account From Your Account

In some cases, you may want to completely remove a Facebook account you have setup in your account.

Note: This is not the same as deactivating/reactivating posting for a Facebook account!

To delete a Facebook account from your account:

1. Go to Home > Settings > Social Networks.
2. Find the grey box with associated with the Facebook account you want to delete.
3. Click Delete.
4. Click Ok.

Connections Center

You can set up connections between Bronto and other applications.

The Connections Center is where you can set up connections with other products you can use to improve your marketing campaigns.
Baynote Connection

Baynote provides product recommendations based off of general customer behavior in relation to other products. If you are a Baynote Recommendations user, then you will be able integrate recommendations directly into your emails with point and click simplicity. This will open up cross-sell and up-sell opportunities within your existing email marketing communications by leveraging your Baynote Recommendation catalogs. Don’t just recommend products on your site, drive increased ROI in your emails too. We have provided an intuitive point and click tool to create and manage recommended items within marketing, as well as automated, email marketing messages sent through the application.

After you have setup the Baynote connection on the Baynote Connections page (located at Home > Connections Center), you will see a new button in the WYSIWYG editor for adding a Baynote Recommendation. Clicking this button will reveal a point-and-click tool for creating Baynote Recommendation images within your email.

The images generated by this tool will include several different elements. Generally, these elements will be an image of the product being recommended, a price for that product, and a description of that product. All of those pieces will be shown within your email as one image - due to the restrictions of emails they must be rendered as an image.

The exact data that is shown within the recommendation is determined by the attributes that you specify when configuring the connection. This is limited only by the data that is maintained within your Baynote account. Take some time to determine what is the best fit for your marketing efforts.

Product urls are used to control which recommendations appear in your emails. You can also choose to show multiple recommendations for any product, not just the top recommendation.

Using different Baynote Recommendation Guides allows you to control the type of recommendation being displayed, (e.g. complimentary vs. competitive recommendations). In a marketing email, you may want to show competitive product recommendations to highlight the diversity of your offerings, whereas in a receipt email, you may want show complimentary products to incentivize an up-sell.

The images that are shown to your contacts are generated in real-time. This means that they may see different recommendations as visitor behavior on your site changes. All information used to generate these images is managed by Baynote Recommendations.

The last item to note is that all images generated by this connection tool will automatically link to the recommended item. This link goes to Baynote, which redirects the contact to the appropriately recommended item based on the same
Set Up The Baynote Connection

In order to enable the Baynote Recommendation connection, you will need to fill out the configuration details. This information is used to construct the image and link URLs needed to generate the product recommendation within your email.

You will need to have a subscription to the Baynote service to take advantage of the Baynote Connection. To enable the connection, a user with administrative privileges must check the Enable Baynote Connection checkbox on the Baynote Connections page. To get to the Connections Center page, go to Home > Connections Center. From here, click the Baynote icon and then click Options.

To setup the Baynote Connection:
1. Go to **Home > Connections Center**
2. Click the Baynote icon.
3. Click **Options**.
4. Click the Enable Baynote Connection checkbox.
5. Fill in your Baynote customer name and customer code in the designated text boxes.
   Your Baynote customer name and customer code are used to indentify your store and customer information within Baynote.
6. Add the Baynote attribute names to the appropriate text boxes.
   Each attribute name represents a piece of data (name of the product, price, etc.) that will be displayed for each recommended product. You can specify up to 3 attributes and may choose to omit some as you wish. We generally recommend that you choose attributes that correlate to:
   - Product title
   - Product price
   - Product savings
   - Product description
   **Tip:** You can choose any attributes that serve your marketing needs. For whichever attributes you do choose, we suggest that you do several tests with different products to ensure that you are happy with how the generated images look.
7. Add a Baynote Image Attribute in the designated checkbox.
   The Baynote Image Attribute is used to determine which image is pulled from Baynote and displayed in your message. Baynote Image Attributes are defined by you in your Baynote account.
8. Add a Baynote Attribute Filter in the designated text box.
   The Baynote Attribute Filter Default setting allows you to choose a default attribute filter to limit the results that are shown in your recommendations. This is only a default setting, which means that it will automatically be used within all your recommendations, but it can be changed as needed when you place a recommendation into an email.
   The Attribute Filter is generally used to limit your recommendations to a specific group of products. For example, if you used a filter of `ProductFlag: true`, this would limit your recommendation to products that have the `ProductFlag` attribute set to `True`. This would remove the possibility of your contacts receiving any recommendations for items in your product catalogs that don't have this attribute set to `True`.
   Refer to Baynote's documentation for more information about attribute filters.
9. Add a Baynote Guide Name in the designated text box.
   The Baynote Guide Name is a default value, which means that you can change it for any specific recommendation that you set up. This tells Baynote Recommendations which of your guides to use when selecting the recommendation for this product. For a listing of available guides, log into your Baynote Account.
10. Click **Save**.

**Custom Web Analytics Connection**

The Custom Web Analytics Connection provides you with insight into the effects of traffic that was driven to your site via email marketing, as well as how effective that traffic was at reaching your marketing goals.

Data can be sliced and diced at deeper levels, including link information and even custom field information for your contacts. This connection opens the door to post-click marketing analysis for increased ROI. While the application does have connections in place for several specific web analytics tools, this connection allows you to provide custom url parameters on your urls. This allows for a one-way connection with almost any web analytics platform.

Once enabled, we will append several tracking parameters onto all URLs within the emails you send out. These parameters provide information about your marketing efforts with every click, thus allowing your web analytics tool to track and deliver analytics information to you.
**Warning:** If the URLs in your messages contain parameters that are the same as the parameters being added by the Custom Analytics connection, we will replace the existing parameters with the Custom Analytics parameters. This could potentially break the existing functionality of the link, so please be mindful of the parameters being added via the Custom Analytics connection and the parameters that already exist in your URLs.

The parameters are added to the end of the URL after we log the click, just as we are redirecting the contact on to their final destination. The difference in the URLs is illustrated below:

Non-tracked URL:

```
http://yoursite.com/landingpage.html
```

Tracked URL:

```
http://yoursite.com/landingpage.html?channel=email&...
```

Within your web analytics tool, you will now be able to track the actions of the contacts that click through from messages you send. From this data, you can better understand how email marketing is impacting website activity and online sales. You will also be able to more easily identify goals reached by visitors who originated from your messages. You can further analyze these results based off of more detailed information from your messages, such as which link they clicked or which subject they received (in the case of an A/B split).

**Set Up Custom Web Analytics Connection**

Once you have enabled this connection, we will automatically begin adding tracking parameters onto the end of all URLs contained in messages you send via the application.

You will need to specify which keys and values you want appended. Within the options tab of this connection, you can create as many parameters as you need. It's a best practice not to pass PII in URLs over the internet, so we recommend not including key and value pairs that might expose PII. For example, email addresses are considered PII.

To setup the Custom Web Analytics Connection:

1. Go to **Home > Connections Center**.
2. Click the **Custom Analytics** box.
3. Click **Options**.
4. Click the **Enable Custom Analytics** checkbox.
5. Add custom Keys and Values in their respective text boxes.

   The Key should be used to designate the type of data being tracked in the URL. The Value is the actual data you want to track. You can hard code values by adding them into the Value text box, or use the dynamically populated Keys and Values we provide. The dynamically populated Keys and Values we provide are:

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>message_name</td>
<td>%%!message_name%%</td>
<td>The name of the message is set as the value.</td>
</tr>
<tr>
<td>message_subject</td>
<td>%%!message_subject%%</td>
<td>The name of the message subject is set as the value.</td>
</tr>
<tr>
<td>Key</td>
<td>Value</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>contact_eid</td>
<td>%%!contact_eid%%</td>
<td>The external identifier of the contact receiving the message is set as the value. This is the same as a contact's API ID.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Important: You should use the contact_eid instead of using a contact's email address. An email address is considered PII and it's a best practice not to pass PII in a URL.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When you use this, you may need to add contact_eid as an excluded query parameter in the View Settings for your Google Analytics account. This prevents Google Analytics from reporting URLs that contain contact_eid as unique. See Adjust Google Analytics Settings on page 199 for more information.</td>
</tr>
<tr>
<td>link_title</td>
<td>%%!link_title%%</td>
<td>The title of the link pointing to the online version of the message</td>
</tr>
<tr>
<td>link_url</td>
<td>%%!link_url%%</td>
<td>The actual URL pointing to the online version of the message</td>
</tr>
<tr>
<td>date_sent</td>
<td>%%!date_sent%%</td>
<td>The date the message was sent is set as the value.</td>
</tr>
</tbody>
</table>

6. Once changes have been made, click **Save** at the bottom of the page.

One last thing you may wish to do within this section is restrict which links we place tracking data onto. By entering your domain name (e.g. yoursite.com) into the **Only include tracking for the following domains** text boxes, we will not place web analytics parameters onto links that go to other sites. These extra parameters do not usually cause any problems, but you could potentially be sending your campaign tracking information to other sites.

Nothing needs to be done within your web analytics solution for this connection to work. However, now that you will be identifying email traffic separately, you may wish to set up new goals or conversions that reflect your marketing efforts.

**Google Analytics Connection**

Google Analytics is a free digital analytics tool that you can use to better understand how customers interact with your site and make purchase decisions. Once you connect Google Analytics with Bronto, Bronto will pass embedded UTM parameters to Google Analytics when your customers click a link within an email. Google Analytics data can help you better understand how to effectively appeal to customers on your Bronto lists and segments.

**Note:** This Bronto connection requires Google Analytics to be configured and running on your website.

Data is sent to Google Analytics when a customer clicks a link within an email. Using Google Analytics' reporting tools, you can create reports to better understand the behavior of customers who came to your site by clicking an email link. Within Google Analytics, site visitor data can be sliced and diced at deeper levels and can be used to fine-tune your marketing efforts. For more information about Google Analytics, visit [https://www.google.com/analytics/](https://www.google.com/analytics/).

When you enable the Google Analytics connection, UTM tracking parameters are added to links within your emails. UTM parameters provide information about your marketing efforts with every click, which allows Google Analytics...
Integrate to track and deliver analytics information to you. If you have set Google Analytics to only track specific domains, the parameters will only be added for links that include those domains.

Parameters are added to the end of a URL after Bronto logs the click and redirects your contact to their destination. You will not be able to see Google Analytics parameters when previewing a message. The difference in the a link with and without tracking parameters is illustrated below:

Non-tracked URL:

`http://yoursite.com/landingpage.html`

Tracked URL:

`http://site.com/index.cgi?utm_source=bronto&utm_medium=email&utm_term=somelinktitle&utm_content=joe%40example.com&utm_campaign=message_group_name`

⚠️ **Warning:** If the URLs in your messages contain parameters that are the same as the parameters being added by the Google Analytics integration, we will NOT replace the existing parameters with the Google Analytics parameters. This could potentially break the existing functionality of the links, so please be mindful of the parameters being added via the Google Analytics integration and the parameters that already exist in your URLs.

Bronto will include the `utm_source`, `utm_medium`, `utm_term`, `utm_content`, and `utm_campaign` parameters by default. You can verify that Google Analytics integration is working by creating an external link in a message, doing a test send of the message, and then clicking a link in the message using your email client.

Bronto automatically sets three UTM parameters. These cannot be overridden:

- **utm_source**: Set to **bronto** unless you have a Multi-Brand account. If you have a Multi-Brand account, your `utm_source` value will be **bm23**. Google Analytics uses `utm_source` to identify the referring source of web traffic.
- **utm_medium**: Set to **email**. Google Analytics uses `utm_medium` to identify a marketing or advertising medium (banner, email, web, etc.).
- **utm_term**: Bronto sets the `utm_term` to the link that was clicked within the message. The `utm_term` is either the title or URL associated with the link the contact clicked in the message to access your site. If an image is a link, the image alt text might also be used. Google Analytics uses `utm_term` to identify paid search keywords used to access your site.

Two parameters can be configured within Bronto:

- **utm_content**: Google Analytics uses `utm_content` to differentiate between links within an email. Use the **Choose the value for utm_content** list to pick what data gets passed from Bronto to Google Analytics to populate `utm_content`. By default this is set to the Message Subject, which can be useful for identifying performance of A/B splits.
- **utm_campaign**: Google Analytics uses `utm_campaign` to differentiate between promotions and other marketing campaigns. Use the **Choose the value for utm_campaign** list to set what data gets passed from Bronto to Google Analytics to populate `utm_campaign`. You can use this parameter to identify a specific variable related to the campaign, such as Send Date or Message Name. By default, this value is set to the Message Name.

By default, any domains linked to via your emails are tracked. To restrict tracking to only specific domains, you can enter the exact URL for those domains in the **Only include Google Analytics tracking for the following domains** text box.

**What You'll See In Google Analytics**

The traffic that you drive to your website via email is represented within the Google Analytics page for your website. When you look at your Traffic Sources within Google Analytics, you will see email as a traffic source.
Integrate

Using this data, you can track contact behavior after clicking a link in an email. This will help you better understand how email marketing impacts your site activity and online sales, identify if marketing goals are reached by visitors who originated from your emails, and further analyze results based off of more detailed information from your messages (such as which links contacts clicked or which subject they received in the case of an A/B split).

**Note:** You may see different conversion numbers reported within Google Analytics and Bronto depending on how you have set up your Google Analytics goals. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper.

### Set Up The Google Analytics Connection

This section describes what you need to do in Bronto to set up the Google Analytics Connection. Google Analytics needs to be configured and running on your website to use the Google Analytics Connection.

1. Go to **Home > Connections Center**.
2. Click the **Google Analytics** box.
3. Click the **Enable Google Analytics** checkbox.
4. Use the **Select a the value for utm_content** list to pick what data gets passed from Bronto to Google Analytics to populate **utm_content**. By default, **Message Subject** will be used.
5. Use the **Select a the value for utm_campaign** list to pick what data gets passed from Bronto to Google Analytics to populate **utm_campaign**. By default, **Message Name** will be used.
6. You may want to have UTM parameters only be appended for specific domains in your emails. If you want a domain link to include UTM parameters, enter it into the **Only include Google Analytics tracking for the following domains** text box. Click **Add Another Domain** to add multiple domains.
7. Click **Save**.

### MyBuys (Magnetic) Connection

MyBuys (Magnetic) allows you to embed MyBuys (Magnetic) recommendations in your transactional emails, such as order confirmations, shipping notifications, and marketing emails like periodic newsletters.

When a contact opens a message containing MyBuys (Magnetic) recommendations, MyBuys (Magnetic) will serve product recommendations as images. These products are recommended based on a contact’s profile in MyBuys (Magnetic), the type of message (e.g. newsletter, order confirmation, or shipping notification), and the content of the message (for example a product that is purchased or shipped). This is done by using HTML `img` tags, where the image source is downloaded from MyBuys (Magnetic) and the clicks are routed through MyBuys (Magnetic).

### Set Up The MyBuys (Magnetic) Connection

In order to enable the MyBuys (Magnetic) Recommendation connection, you will need to fill out the configuration details.

**Note:** You will need to have a subscription to the MyBuys (Magnetic) service to take advantage of the MyBuys (Magnetic) Connection. To enable the connection, a user with administrative privileges must click the **Enable MyBuys (Magnetic) Connection** checkbox on the MyBuys (Magnetic) Connections page. To get to the Connections Center page, go to **Home > Connections Center**. From here click the MyBuys (Magnetic) icon and then click **Options**.
To setup the MyBuys (Magnetic) Connection:

1. Go to **Home > Connections Center**
2. Click the MyBuys (Magnetic) icon.
3. Click **Options**.
4. Click the **Enable MyBuys (Magnetic) Connection** checkbox.
5. Fill in your MyBuys (Magnetic) Client ID and Client Specific Domain in the designated text boxes.
6. Click **Save**.

**Omniture Connection**

Omniture SiteCatalyst provides marketers with actionable, real-time intelligence about online strategies and marketing initiatives.

Through a data connection with Omniture, you will be able to remarket to contacts based on website interactions, while also enriching your Omniture reporting. In Bronto you will gain access to Omniture segment data within both Message Reports and the segment tool. This provides you with the ability to identify contacts who have converted, viewed products, or abandoned products (depending on your Omniture segment selection). In Omniture, you will see crucial email marketing metrics offered alongside the existing reporting information. This gives you a beginning to end view of your email marketing efforts all in one place. Please note that this connection requires a subscription to Omniture SiteCatalyst, as well as their Genesis platform.

Once enabled, we will append several tracking parameters onto all links within the emails you send out. These parameters identify the delivery and contact with every click. This allows Omniture to track and deliver precise marketing information to you. It doesn't stop there. Every night, Bronto connects to Omniture and passes over information about recent deliveries, including all crucial details, such as sent, delivered, bounced, unsubscribes, open and clicks. In return, Omniture passes back detailed segment information that is collected on your website.

**Warning:** If the URLs in your messages contain parameters that are the same as the parameters being added by the Omniture connection, we will replace the existing parameters with the Omniture parameters. This could potentially break the existing functionality of the links, so please be mindful of the parameters being added via the Omniture connection and the parameters that already exist in your URLs.

**Warning:** Product names from Omniture containing greater than 250 characters will be truncated when they are passed to the application. For greater usability in the application, we suggest you limit product names in Omniture to less than 250 characters.

**Access To The Web Analytics Tab**

With this connection enabled, you will now gain access to the Web Analytics tab within Message Reports. This tab provides a listing of products associated with the Omniture segments you have selected for the connection. From here you can create lists within Bronto from this data.
Additional Segment Criteria

You will find that Bronto's segments have an additional option of **Converted via Omniture**. This option allows you to identify people by the product and segment data passed over from Omniture.

Tip: For more information on using the Converted Via Omniture segment criterion, see Create A Segment Based On Contacts Who Converted Via An Omniture Segment on page 472.

Your Reporting Data In Omniture

Within Omniture, you will be able to track email marketing metrics within their powerful reporting tool. From this, you can better understand how email marketing is impacting website activity and online sales.

As you can see, you not only get raw email marketing metrics, but you can actually map revenue to individual email marketing efforts. Whether looking at the hard numbers or Omniture's graphical views, you will easily be able to prove the value of your email marketing efforts.

**Related Topics**

Create A Segment Based On Contacts Who Converted Via An Omniture Segment on page 472
Omniture Connection Prerequisites

Before activating this connection, review the following items against your deployments of Omniture SiteCatalyst and Bronto. Doing so will ensure the appropriate best practices and prerequisites are in place prior to activation.

Omniture SiteCatalyst

Report Suite Specific

Be advised that this connection is report suite specific. Ensure you have selected the desired report suite prior to activating the connection.

Authorized Representative

Be advised this connection will incur fees. By activating this connection, you represent you are an authorized representative of your company and you agree to pay the fees associated with this connection.

Current Customer of Bronto

This connection requires you to be a customer of both Omniture and Bronto. If you are not currently a customer of Bronto, you will not have the information necessary to complete the connection wizard (visit the Genesis Showcase to learn more about Bronto). If you are currently a customer of Bronto, you will need your Bronto Account ID, or the unique identifier assigned to your organization by Bronto, in order to complete the connection wizard.

Omniture Data Warehouse

This connection requires the Omniture Data Warehouse to be enabled in order to generate remarketing segments. If you have not enabled the Omniture Data Warehouse, contact Omniture LiveSupport for details.

Visitor ID

If you're not currently following the best practice of capturing a "Visitor ID" within a Custom Commerce Variable (eVar), you'll want to do so prior to activating the connection. Otherwise, the connection system will be unable to generate remarketing segments. Ideally, this Visitor ID should be the same Visitor ID used by Bronto (if not, see "Recipient ID" below).

Recipient ID

If you use a different Visitor ID than Bronto, you must identify a separate eVar in which to capture the Bronto Visitor ID, sometimes called the "Recipient ID," and select it when prompted by the connection wizard.

External Tracking

If you're not currently following the best practice of enabling external tracking for each e-mail campaign you send, you must do so to ensure a successful connection. See the Bronto section below for details.

SiteCatalyst Plug-In

If you haven't already done so, you must install the SiteCatalyst plug-in below (simply copy these few lines of code and add them to the SiteCatalyst code on your pages). This plug-in will enable SiteCatalyst to automatically identify and capture incoming traffic resulting from Bronto-produced e-mail campaigns appropriately.

SiteCatalyst Plug-In example:

```javascript
<script type="text/javascript">
/*
 * Plugin: getQueryParam 1.1 - Return query string parameter values
 */

s.getQueryParam = new Function("qp", "d", ""
+ " var s=this,v=',d=d?d:'",i,t;while(qp){i=qp.indexOf(',');i=i<0?qp.length:i;
+ "t=s.gcgi(qp.substring(0,i));if(t)v+=v?d+t:t;qp=qp.substring"
+ "(i=qp.length?i:i+1))return v");
</script>
```
Integrate

```javascript
s_cny.gcgi = new Function("k", ""
+ "var v='',s=this;if(k&&s.wd.location.search){var q=s.wd.location.search.toLowerCase();
+ "q=q.indexOf('?');q=q>0?q[q.substring(qq+1);v=s."
+ "pt(q,'&','cgif',k.toLowerCase())return v});

s_cny.cgif = new Function("t", "k", ""
+ "if(t){var s=this,i=t.indexOf('='),sk=i<0?t:t.substring(0,i),sv=i<0?
+ "'True':t.substring(i+1);if(sk.toLowerCase()==k)return s.epa(sv)}return ''");

/*in the s_doPlugins function */

s.campaign = s.getQueryParam("bro_MID");
//places query param value from cid in campaign variable
s.eVar2 = s.getQueryParam("bro_RID");
//places query param value from rid in eVar2 variable
</script>

Note: The plug-in above assumes certain Custom Commerce Variables (eVars) are available. If the variables specified in the plug-in above are not available within your SiteCatalyst deployment, simply replace them with those that are available.

Privacy Compliance

You should understand that by enabling "Visitor ID" tracking, this feature may track personally identifiable information of your site visitors. This has privacy implications requiring the implementation of appropriate procedures by your organization, such as providing notice to, and consent of, your site visitors.

Bronto

- **Click Through Tracking Required** - Web Analytics connections are only possible if Click Through Tracking is enabled
- **Bronto Account ID** - This can be found when you enable Omniture connection on the settings page. See "Configure Bronto" section below for further instructions.

Set Up The Omniture Connection

This section describes what you need to do in Bronto and in Omniture to properly setup the Omniture Connection.

You must first enable the Omniture connection within Bronto. This is done via the Options tab on the Omniture Connections page. By checking the Enable Omniture Connection checkbox, you will turn this connection on from the Bronto side.

To setup the Omniture Connection in Bronto:

1. Go to **Home > Connections Center**.
2. Click on the Omniture box.
3. Click Options.
4. Click the Enable Omniture Genesis checkbox.
   Make note of the BrontoID. You will need the BrontoID in order to complete the Omniture portion of the connection.
5. Optional: You may wish to restrict which links we place Omniture tracking data onto. The box at the bottom of the screen allows you to limit the links to which we will add tracking parameters.
   This is useful if you often link to other sites and don't want Omniture tracking parameters added to those links.
   For example, if your site is http://mysite.com or http://commerce1.mysite.com and you often link to http://partner1.com and http://partner2.com, then you may want to enter mysite.com into this box. This will limit Bronto to adding parameters onto links that contain mysite.com - this will work for both of those first links because they both contain mysite.com. If you also want tracking data added to links to http://myothersite.com then you should add that in after a coma. (i.e. mysite.com, myothersite.com)
6. Click Save.
   What you need to do in Omniture to configure SiteCatalyst:
7. Log into SiteCatalyst.
8. Click the Genesis tab or icon.
   You will see the power of Genesis in the following screen. The options or choices presented to you may differ from those shown here.
9. Click on the Bronto icon on the list on the left side of your screen and drag the icon to an empty outlined area to the right.

This will plug the Bronto icon into SiteCatalyst and begin the connection process.

When Bronto has been dropped into the upper left hand outline, dashed lines will appear. The dashed lines indicate that connection has not been accomplished.

As soon as the Bronto icon is dropped into place, a series of popups will appear.

10.

11. Click in the Acceptance checkbox.
12. Click Next.

13. Specify the name your system will apply to this Bronto connection.

14. Enter the email address where you wish to receive confirmations or notices concerning this connection.

15. Click Next.

16. Specify your Account ID for this Bronto account.

17. Click Next.

18. Use the drop-down box to identify which SiteCatalyst eVar will be used for tracking the Bronto Visitor ID.

19. Check the box confirming that you agree with and understand the statement: "I understand that by enabling "Visitor ID" tracking, this feature may track personally identifiable information of our site visitors. This has
privacy implications requiring the implementation of appropriate procedures by my organization, such as providing notice to, and consent of, our site visitors."

20. Should you wish to participate in the Remarketing Segments program, check the box beside each one you wish to have.

21. Click Next.

22. Use the drop-down box to identify and specify which eVar will be used for tracking the E-Mail Message ID.

23. Click Next.

24. Click the checkbox for each E-Mail Metric you wish to map to an established SiteCatalyst Event.

25. Use the drop-down box to identify and specify which SiteCatalyst Event should be mapped to the chosen E-mail Metric.
26. Review your connection configuration. Click **Save** to finish your Bronto Connection process.

If you successfully completed the connection, you will see the following screen:
Salesforce Connection

Salesforce (salesforce.com) is a leading provider of on-demand customer relationship management (CRM) services. Salesforce customers can leverage the application's Salesforce connection to import contacts, including custom fields, directly from your custom Salesforce.com reports. This process will save time and ensure data synchronization.

The Salesforce Connection works by allowing you to import contacts and data from a Salesforce report. Once you have the Salesforce Connection enabled and configured, you will see a new import option, **Import from a Salesforce report**. When performing a contact import in the application (go to **Contacts > Manage > Import**), you will be able to choose to import your contacts from a Salesforce report.

The application will use the salesforce username and login information you added on the Salesforce Connections page to access your Salesforce account. A pull-down menu will be populated with all of the reports available in your Salesforce account.

From here, you can select a specific report and continue along with the import process. You can use the data contained in Salesforce reports to create new lists and segments based on your existing Salesforce data.

**Note:** Enabling this connection has no impact on your Salesforce.com account, but does require the Salesforce.com API.

**Tip:** For more information on importing contacts contained in Salesforce.com reports, see **Import A Salesforce Report** on page 1091.

**Related Topics**

Import A Salesforce Report on page 1091

**Prerequisites to Setting Up The Salesforce Connection**

The Salesforce connection requires that you have purchased and are using the Salesforce API. You will also need to add the following IP address range (216.27.63.0 - 216.27.63.255) into your Salesforce account's trusted networks in order for the two applications to be properly connected. You will be adding our IP address range to your Network Access list. To get to the network access settings, you will need to log into Salesforce.com with an administrative account and go to the Setup area.

To add our IP address range to your Network Access list:

1. Log in to Salesforce.com with an administrative account.
2. Go to the set up area.
3. Go to **Administration Section > Network Access**.
4. Click New.
5. Add in a range with a Start IP Address of 216.27.63.0 and an End IP Address of 216.27.63.255.
6. Click Save.
   This range should show up within your Salesforce.com list and you will be ready to import new contacts via Salesforce.com reports.

**Set Up The Salesforce Connection**

In order to enable the Salesforce.com connection, you will need provide your Salesforce.com username and password. This information will be stored securely on our servers for use in accessing your Salesforce.com reports.

To setup Salesforce connection:

1. Go to **Home > Connections Center**.
2. Click on the **Salesforce** box.
3. Click **Options**.
4. Click the **Edit Salesforce Login Info** link.
5. Enter you Salesforce username and password in the Username and Password text boxes.
6. Click **Save**.

**Stone Edge Connection**

Stone Edge provides a leading order management system for independent retailers.

The Stone Edge connection makes it easy to send contact data updates from Stone Edge to the application. Using the data from Stone Edge, you can send more targeted emails to your contacts, thus increasing conversions and contact engagement.

The Stone Edge connection uses the standard Direct Import functionality to upload a list of contacts and their corresponding data into the application. If the contacts already exist in the application, then their field data is updated. If the contacts do not exist, then they are created with a status of "transactional". To setup the connection, you must enter the details contained in the Direct Import section on the Data Exchange page (**Home > Settings > Data Exchange**) into Stone Edge. Specifically, the URL, key, user_id, and site_id must be entered into Stone Edge.

**Set Up The Stone Edge Connection**

1. Go to **Tables > Contacts > Fields**.
2. Click **Create New Field**.
3. Create fields in the application as specified below.
   The Name and Type of the field must exactly match the table below for the field data to be imported properly.

   **Note:** Contact your account manager if you reach your field allocation limit and need to purchase more fields.
4. Go to Home > Settings > Data Exchange and note the information under the Direct Import section. This includes:
   - The URL (known as BrontoSite in Stone Edge)
   - key (known as BrontoToken in Stone Edge)
   - user_id (known as BrontoUserId in Stone Edge)
   - site_id (known as BrontoSiteId in Stone Edge)

5. From here, you will need to log into your Stone Edge account to finish setting up the connection.
   You can access the Stone Edge documentation for instructions on how to finish setting up the connection from within Stone Edge.

<table>
<thead>
<tr>
<th>Stone Edge Field</th>
<th>Field Name in the Application</th>
<th>Field Type</th>
<th>Field Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>prefix</td>
<td>text</td>
<td>Contact's prefix</td>
</tr>
<tr>
<td>First Name</td>
<td>firstname</td>
<td>text</td>
<td>Contact's first name</td>
</tr>
<tr>
<td>Middle Name</td>
<td>middlename</td>
<td>text</td>
<td>Contact's middle name</td>
</tr>
<tr>
<td>Last Name</td>
<td>lastname</td>
<td>text</td>
<td>Contact's last name</td>
</tr>
<tr>
<td>Suffix</td>
<td>suffix</td>
<td>text</td>
<td>Contact's suffix</td>
</tr>
<tr>
<td>Company</td>
<td>company</td>
<td>text</td>
<td>Contact's company name</td>
</tr>
<tr>
<td>City</td>
<td>city</td>
<td>text</td>
<td>Contact's address city</td>
</tr>
<tr>
<td>State</td>
<td>state</td>
<td>text</td>
<td>Contact's address state</td>
</tr>
<tr>
<td>Zip</td>
<td>zip</td>
<td>text</td>
<td>Contact's address zip</td>
</tr>
<tr>
<td>Country</td>
<td>country</td>
<td>text</td>
<td>Contact's address country</td>
</tr>
<tr>
<td>Phone</td>
<td>phone</td>
<td>text</td>
<td>Contact's address phone</td>
</tr>
<tr>
<td>Original Order Date</td>
<td>originalorderdate</td>
<td>date</td>
<td>The date of the first order ever placed by this contact.</td>
</tr>
<tr>
<td>Recency</td>
<td>recency</td>
<td>date</td>
<td>The date of the most recent order placed by this contact.</td>
</tr>
<tr>
<td>3 Month Frequency</td>
<td>3mofrequency</td>
<td>number</td>
<td>The number of orders placed by this contact in the last 3 months.</td>
</tr>
<tr>
<td>3 Month Monetary Value</td>
<td>3momonetaryvalue</td>
<td>currency</td>
<td>The total amount of orders placed by this contact in the last three months.</td>
</tr>
<tr>
<td>6 Month Frequency</td>
<td>6mofrequency</td>
<td>number</td>
<td>The number of orders placed by this contact in the last six months.</td>
</tr>
<tr>
<td>6 Month Monetary Value</td>
<td>6momonetaryvalue</td>
<td>currency</td>
<td>The total amount of orders placed by this contact in the last six months.</td>
</tr>
<tr>
<td>12 Month Frequency</td>
<td>12mofrequency</td>
<td>number</td>
<td>The number of orders placed by this contact in the last twelve months.</td>
</tr>
<tr>
<td>Stone Edge Field</td>
<td>Field Name in the Application</td>
<td>Field Type</td>
<td>Field Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------</td>
<td>------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>12 Month Monetary Value</td>
<td>12momoneyvalue</td>
<td>currency</td>
<td>The total amount of orders placed by this contact in the last twelve months.</td>
</tr>
<tr>
<td>Previous Order Date 1</td>
<td>previousorderdate1</td>
<td>date</td>
<td>The date of the most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Source 1</td>
<td>previousordersource1</td>
<td>text</td>
<td>The source of the most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Amount 1</td>
<td>previousorderamount1</td>
<td>currency</td>
<td>The amount of the most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Date 2</td>
<td>previousorderdate2</td>
<td>date</td>
<td>The date of the second most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Source 2</td>
<td>previousordersource2</td>
<td>text</td>
<td>The source of the second most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Amount 2</td>
<td>previousorderamount2</td>
<td>currency</td>
<td>The amount of the second most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Date 3</td>
<td>previousorderdate3</td>
<td>date</td>
<td>The date of the third most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Source 3</td>
<td>previousordersource3</td>
<td>text</td>
<td>The source of the third most recent order placed by this contact.</td>
</tr>
<tr>
<td>Previous Order Amount 3</td>
<td>previousorderamount3</td>
<td>currency</td>
<td>The amount of the third most recent order placed by this contact.</td>
</tr>
</tbody>
</table>

**TicketReturn Connection**

TicketReturn provides a ticketing and box office system for clients that are mid-market sports and entertainment venues.

The TicketReturn connection makes it easy to send contact data updates from TicketReturn to the application. Using the data from TicketReturn, you can send more targeted emails to your contacts, thus increasing tickets sales, reducing no-shows, etc.

The TicketReturn system uses our API to send contact information to the application on a nightly basis. Any contact fields required by TicketReturn are automatically created and populated.
What Field Data Is Updated By The TicketReturn Connection?

Once the TicketReturn connection is enabled, specific fields in your account will be updated with data from TicketReturn on a nightly basis. The TicketReturn connection first checks to see if a field exists. If the field exists, then it is updated. If a field does not exist, it is created.

<table>
<thead>
<tr>
<th>Field Name Updated/Created By TicketReturn In Your Account</th>
<th>Data Added To The Field By TicketReturn</th>
</tr>
</thead>
<tbody>
<tr>
<td>email</td>
<td>The email address of a contact. The Email Address is mandatory.</td>
</tr>
<tr>
<td>firstname</td>
<td>The first name of the contact.</td>
</tr>
<tr>
<td>lastname</td>
<td>The last name of the contact.</td>
</tr>
<tr>
<td>sponsorid</td>
<td>The Sponsor ID for all event information on the contact.</td>
</tr>
<tr>
<td>sponsoridother</td>
<td>List of other Sponsor IDs that the contact has also purchased. For lists, each item should only be listed once, each item is separated by a space, and each item is enclosed in [square braces].</td>
</tr>
<tr>
<td>ticketpackages</td>
<td>List of ticket packages that the contact has purchased. For lists, each item should only be listed once, each item is separated by a space, and each item is enclosed in [square braces]. The fields is blank if the contact has not purchased any ticket packages, only individual tickets.</td>
</tr>
<tr>
<td>Individualtickets</td>
<td>Total number of tickets the contact has purchased that were not a part of a package.</td>
</tr>
<tr>
<td>Field Name Updated/Created By TicketReturn In Your Account</td>
<td>Data Added To The Field By TicketReturn</td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>tickettotalnumber</td>
<td>Total number of tickets the contact has purchased (including both package and individual tickets). For contacts with multiple ticket packages, the field value is the sum of the number of tickets in all packages and individual tickets.</td>
</tr>
<tr>
<td>percentticketsused</td>
<td>Percentage of all tickets purchased that could have been used, which have been used. For contacts with multiple ticket packages, the field value is the sum of the number of used tickets in all packages and individual tickets, divided by the Total Tickets from the tickettotalnumber.</td>
</tr>
<tr>
<td>percenteventsattended</td>
<td>Percentage of events purchased by the contact that they could have been attended, which they did attend.</td>
</tr>
<tr>
<td>lasteventpurch</td>
<td>The name of the last event for which the contact had purchased a ticket.</td>
</tr>
<tr>
<td>lasteventdatepurch</td>
<td>The date of the last event for which the contact had purchased a ticket.</td>
</tr>
<tr>
<td>lasteventtimepurch</td>
<td>The time of the last event for which the contact had purchased a ticket to.</td>
</tr>
<tr>
<td>lasteventpurchattended</td>
<td>Flag indicating if the contact's ticket to the last event was used. To determine if a contact with multiple ticket packages and individual tickets attended an event, any single used ticket is represented as a &quot;Yes&quot; in the lasteventpurchattended field.</td>
</tr>
<tr>
<td>lasteventattended</td>
<td>The name of the last event for which the contact has a used ticket.</td>
</tr>
<tr>
<td>lasteventdateattended</td>
<td>The date of the last event for which the contact has a used ticket.</td>
</tr>
<tr>
<td>lasteventtimeattended</td>
<td>The time of the last event for which the contact has a used ticket.</td>
</tr>
<tr>
<td>nextevent</td>
<td>The next event name.</td>
</tr>
<tr>
<td>nexteventdate</td>
<td>The date of the next event.</td>
</tr>
<tr>
<td>nexteventtime</td>
<td>The time of the next event.</td>
</tr>
<tr>
<td>nexteventhasticket</td>
<td>Flag indicating if the contact has a ticket to the next event. To determine if a contact with multiple ticket packages and individual tickets has tickets to an event, any single purchased ticket is counted as a &quot;Yes&quot; in the nexteventhasticket field.</td>
</tr>
<tr>
<td>nexteventpurch</td>
<td>The name of the next event for which the contact has a ticket.</td>
</tr>
<tr>
<td>nexteventdatepurch</td>
<td>The date of the next event for which the contact has a ticket.</td>
</tr>
<tr>
<td>nexteventtimepurch</td>
<td>The time of the next event for which the contact has a ticket.</td>
</tr>
</tbody>
</table>
**Set Up The TicketReturn Connection**

**Warning:** Fields that already exist that have the same name as those fields used by the TicketReturn connection will be overwritten with the data from TicketReturn.

**Note:** If you delete a field used by the connection, it will be re-created and populated with data during the nightly data refresh.

1. Go to **Home > Connections Center**.
2. Click **TicketReturn**.
3. Click the Enable TicketReturn connection checkbox.
4. Go to **Home > Settings > General**.
   - Make note of your Site Name. You will need this information later on.
5. Go to **Home > Users**.
6. Click on a user's name.
7. Click **Edit Permissions**.
8. Click **Other**.
9. Click the **API Permissions** checkbox.
10. Click **Save**.
11. Contact Ticket Return to provide them with your Bronto API token.
   - The TicketReturn connection will be enabled when Bronto starts receiving data from Ticket Return. After it is enabled, the applicable contact fields in your account will be updated with data from TicketReturn.

**Pontiflex Connection**

Pontiflex provides a leading signup advertising platform for ecommerce companies and nonprofit organizations.

The Pontiflex connection makes it easy to transfer contact data from Pontiflex to the application and to trigger real-time welcome messages to new subscribers. Using Pontiflex, you can run signup ads within mobile apps and websites, and accelerate the growth of your housefile with brand-specific, new-to-file confirmed opt-ins.

The Pontiflex connection uses the standard Direct Import functionality to upload a list of contacts and their corresponding data into the application. If the contacts already exist in the application, then they are "de-duplicated" and not added. All you need to do to setup the Pontiflex integration is provide data from your account to Pontiflex. They will need the following data:

- `user_id`
- `site name`
- `list ID`
- `field names` Optional

To trigger a welcome email to your new signups, you will need to supply Pontiflex with a message ID and the From email (delivery address the message should appear to come from).

**Set Up The Pontiflex Connection**

Using Pontiflex, you can run signup ads within mobile apps and websites, and accelerate the growth of your housefile with brand-specific, new-to-file confirmed opt-ins.

**Acquiring The Data Needed For Direct Import (Data Transfer)**

1. Obtain and make note of the `user_id`. To do this:
   a) Go to **Home > Settings > Data Exchange**.
   b) Scroll down to the Direct Import section. Make note of the `user_id`
2. Obtain the site name for your account. To do this:
   a) Go to **Home** > **Settings** > **General**.
   b) Make note of the site name specified for your account.

3. Obtain a list ID for the list you want to add the contacts to. To do this:
   a) Go to **Tables** > **Contacts** > **Lists**.
   b) Click on the name of the list you want to add the contacts to. You will be brought to the overview page for that list.
   c) Scroll down to the bottom right corner of the list overview page. Make note of the **List API ID**.

4. Optional: You can pass additional data about contacts from Pontiflex into Bronto (first name, last name, city, state, zip, etc.). This information is stored in fields in the application. If you wish to store additional contact data from
Pontiflex in fields in the application, make note of the field names you wish to use. To view all the fields in your account, go to **Tables > Contacts > Fields**.

5. Send this information to Pontiflex.

6. Go to **Messages > Messages**.

7. Click on the name of the email message you wish to send.

8. From the Message Overview page, make note of the **Message API ID** for the message.

   The Message API ID is located in the bottom right portion of the page.

9. Choose a from name for the email being sent.

   The from name, also called an alias, is the name that appears to the recipient of the email message.

---

**Manage**

Manage Knowledge Base topics cover how to manage your Bronto account.

This includes both your account settings - passwords, etc - and Bronto settings - system formatting, private domains, etc.
Your Account Information

The Account Information page (accessible via the Account Info link in the top right corner of the application) is where you manage all of the information regarding your account.

This includes your credit card information, account usage, billing contact information, subscription information, sending history, and invoice information.

User Information In Your Account

The User Information Overview section contains the basic information about your account. To access the User Information Overview, click Account Info in the top right of the page. In this section you can:

- Change your password
- Change your security question
- View your email address
- View your application edition
- View the modules you are using
- View your billing period
- View your allocation period
- View your data retention period

Account Resource Usage

The Account Info link, located under your name in the platform banner, shows the number and allocation percentage of account resources that are being used.

The Resource Usage section on the Account Info page lets you view the following information in your account:

- Emails Sent - In this section you can view the total number of emails sent, the total number of emails allocated to your account, and the percentage of emails you have used so far.
- Bump Upgrade Emails - In this section you can view number of Bump Upgrades currently available in your account. Bump Upgrades allow you to purchase extra sending capacity if you are nearing your allocation limit before the end of your billing period.

  Tip: Contact your account manager if you are interested in purchasing additional bump upgrades.

- SMS Messages - In this section you can view the number of SMS messages sent, the total number of SMS messages allocated to your account, and the percentage of SMS messages you have used so far.
- Contacts - In this section you can view the total number of contacts used in your account, the total number of contacts allocated to your account, and the percentage of contacts you have used so far.
- Hosting - In this section you can view the total amount of hosting space used, the total amount of hosting space allocated to your account, and the percentage of hosting space you are currently using.
- Users - In this section you can view the total number of users created in your account, the total number of users allocated to your account, and the percentage of users created in your account so far.
- Fields - In this section you can view the total number of fields created in your account, the total number of fields allocated to your account, and the percentage of fields you have used so far.
Manage Subscription Information

The Subscription Information section lets you see an overview of your subscription contract. Here you can see the number of contacts allotted to your account, the number of users you are allowed to have, the amount of hosting space allotted to your account, the number of API permissions allotted to your account, and whether or not your account has branding enabled. Contact your account manager to upgrade or change your subscription.

View Your Billing Contact Info

You can view your billing contact information by going to Account Info > Billing. You can edit your billing contact information by clicking Edit.

Providing your billing information and keeping it up to date is required to keep your account active.

Note: If you are late on your payment, your account will automatically be disabled - meaning that you can no longer send messages. If your payment is 30 days overdue, we will terminate your account. Please contact your account manager if you have questions about payment terms for your subscription.

Change Your Contact Info

You can update your contact information.

To change your contact information

1. Go to Home > Settings > Personal.
2. Click Edit Contact Information.
3. Make any desired edits to your contact information.
4. Click Save.
Change Your Password

You can update your Bronto account password.

To change your password:

1. Go to Home > Settings > Personal.
2. Click Change Password.
3. Enter in your current password.
4. Enter in a new password and confirm the new password.
5. Click Save.

Change Your Security Question

You can update the security question you use to log in.

To change your security question:

1. Go to Home > Settings > Personal.
2. Click Change Security Question.
3. Select a security question using the Security Question pull-down menu.
4. Add an answer for the question in the Security Answer text box.
5. Click Save.
Sending Domain

A sending domain is the domain that Internet Service Providers (ISPs) associate with your Bronto deliveries. It's used by ISPs to verify a sender's identity and to track sending reputation.

A sending domain is a back-end configuration that is set up one time in Bronto and is used for email authentication, specifically DomainKeys Identified Mail (DKIM) authentication. The sending domain isn't used to provide the domain your contacts see in the From Address, unless you enable reply tracking. Instead, the From Address is a field that is configured by either setting a default for your account or by typing it in when you send a message. You can use the same domain/subdomain for both of these, but it isn't required. The thing to remember is:

• A sending domain is used for email authentication and should not be changed once it is configured.
• The From Address shown to customers can be modified any time you schedule a delivery.

Your sending domain affects your deliverability; your From Address does not.

You can use one of these for your sending domain:

• Bronto's shared sending subdomains.
• Your company's domain. For example, orangelimes.com.
• A subdomain of your company's domain used specifically for Bronto deliveries. For example email.orangelimes.com.

Once you've configured Bronto to use one of these, every delivery will be associated with this (sub)domain. The Bronto subdomain is a shared domain; it is used by many Bronto customers. Your corporate (sub)domain is a private domain; only the messages you send are associated with this sending domain.

The reputation of your sending domain greatly impacts your Gmail deliverability; i.e. determines whether your messages make it to your contacts' inboxes. So it's important to weigh the advantages and disadvantages of each option before configuring your sending domain.

For more information about sending reputation see Check Your Gmail Sending Reputation on page 1321.

Bronto Shared Sending Subdomain

By default, your account will use the Bronto sending subdomain. Our reputation is shared by all customers who use our domain. Their decisions affect our sending reputation, which could affect your deliverability. While we strive to maintain a good reputation, you'll need to weigh whether you want to give up the ability to control your own reputation.

There are a couple of other disadvantages to using Bronto's sending domain:

• Some ISPs use DomainKeys Identified Mail (DKIM) for sender authentication. When your From Name uses a domain that doesn't match your sending domain, some ISPs, like Gmail, will register a DKIM authentication issue and display a warning at the top of contacts' email. This may make contacts distrust the message content or mark it as spam.
• Some links in your messages - links to webforms, for example - will include the sending domain. A contact can see this when hovering over the links. If contacts notice that the URL for a link does not match the From domain, they might not trust the message is from your company.
**Corporate Domain**

You can use your corporate domain to send with Bronto. This will allow you to control your own sending reputation and promotes an consistent branding.

However, using a corporate subdomain will also accomplish these things and is generally a better strategy. Your corporate domain is already used to send business messages. When you also use your corporate domain to send marketing messages, this will have an impact on the sending reputation of your corporate domain. If issues with your marketing messages lower your corporate domain reputation, your ability to send business emails could be impacted. Using a corporate subdomain dedicated to marketing messages will prevent this.

**Corporate Subdomain**

Generally, we recommend using a corporate subdomain for your sending domain. Sometimes this is also referred to as a child domain. Using a corporate subdomain:

- Lets you control your own reputation, You won't share your reputation with other Bronto customers like you do when you use Bronto's shared sending subdomain.
- Separates your business sending from your marketing sending. When you use your corporate domain, issues with your marketing messages can affect the deliverability of all messages sent from your corporate domain. Using a corporate subdomain dedicated to sending marketing messages will keep these reputations separate.
- Allows you to promote clear and consistent branding.
- Eliminates domain mismatch issues that can be caused by DKIM authentication.

If you already send from a subdomain with a good reputation, you can leverage your existing reputation and your future reputation will only be impacted by decisions you make. If you aren't currently using a sending subdomain, or have one with a bad reputation, you can set up a new subdomain and use Bronto's warm up strategy to help establish or raise your domain's reputation.

If you've decided to use the Bronto sending domain, do nothing. If you've decided to use a private domain, click here for instructions on how to Set Up A Private Sending Domain on page 1322.

**Check Your Gmail Sending Reputation**

Gmail tracks your (sub)domain's deliverability record and uses this to assign a reputation. It's important to understand how Gmail reputation works, what your reputation is, and how you can influence your future reputation.

Your Gmail sending reputation is based on several factors:

- Contact engagement metrics. The more opens and/or clicks, the higher your sending reputation.
- How "old" your domain is. A new domain is automatically labeled as suspicious until there are several days of sending activity.
- Number and frequency of complaints or sends to invalid email addresses. Sending to contacts that mark your messages as spam, or sending to nonexistent email addresses, will hurt your reputation.

We recommend using Google's postmaster tools to check your reputation. Google has set 4 levels of sender reputation:

- High - Your domain has a good track record and low spam rate.
- Medium - Your domain has intermittently sent low volumes of spam.
- Low - Your domain has sent a considerable volume of spam and future messages are also likely to be marked as spam.
- Bad - Your domain has a history of sending extremely high volumes of spam and/or the email that is being delivered to customers has a low engagement rate.

When you have a High-Low rating, Google allows your messages to be delivered. Messages sent from a Bad domain go straight into Google's spam folder.

**Tip:** Most other ISPs use IP-based sending to track and assign reputation, but still use contact engagement as the primary reputation metric. If you see less than 1% contact engagement from other providers, such as Microsoft, consider using a modified version of Bronto's Gmail warm up strategy targeted towards engaged contacts who use these providers.
You can continue to use a subdomain with a Low reputation, but you should implement a warm up plan to improve your reputation as soon as your private domain is set up in Bronto. But when your domain's reputation is Bad, it can takes weeks to warm up (if ever) and it's better to make a new subdomain that you can warm up more quickly.

To check your Gmail sending domain's reputation:

1. Go to postmaster.google.com
2. Use Google's wizard to submit your domain information.

   If you run into issues, Google provides this help topic you can use to troubleshoot.

   The postmaster site will provide you with your sending reputation. Use this information to decide whether to use this domain to Set Up A Private Sending Domain on page 1322.

Set Up A Private Sending Domain

This topic explains how to set up your corporate domain or subdomain so Bronto can use it as your sending domain.

In order to accomplish this, you will need to update your DNS records so Bronto can be configured to use your (sub)domain to send messages and still be able to collect delivery metrics. If you don't have access to your DNS records, work with your IT team on this update.

We recommend using a subdomain dedicated to Bronto deliveries so that any changes to your marketing sending reputation won't impact deliveries of business emails from your corporate address. If you have an existing subdomain with a good reputation, we suggest you continue to use that. There are some extra considerations when moving a subdomain between ESPs (Email Service Providers):

- While you can send from the same domain using two different email providers, you will need to set up and use a different subdomain for managing links, replies, and bounces. See step 1 for more details.
- CAN-SPAM rules require that the unsubscribe methods provided in a message remain active for 30 days after a message is sent. When you move your subdomain over, you will need to set up a way to manage unsubscribe requests in messages you sent from your previous provider.

If your reputation isn't great, you can still use your current sending domain if you implement a warm up plan to improve your reputation after your sending domain is set up in Bronto. But when your current reputation is bad, it can takes weeks to warm up and it might be better to make a new subdomain. For more information see Check Your Gmail Sending Reputation on page 1321.

If you don't have an existing domain/subdomain you want to use, your IT team will need to register and set up the new corporate subdomain. This should be a subdomain of your corporate domain reserved for Bronto to use for sending messages; for example, email.yourdomain.com.

Tip: Don't use a hyphen to create a new subdomain because ISPs will interpret this as being a completely different domain.

A new domain will also require a warm up plan, though it can take only a few strategic, successful sends to warm up.

To configure Bronto to use your corporate domain or subdomain:

1. Add CNAME resource entries to your domain's DNS records:

   This lets Bronto to track delivery metrics and send messages using your domain while allowing ISPs to associate messages with your corporate domain/subdomain. Do one of the following:

   - If using your corporate domain for your sending domain add:


   to your domain's DNS records.
   - If using a subdomain for your sending domain add:

to your domain's DNS records.

$b$ and $yourdomain$ are variables that need to be replaced with your real sending domain information. The first entry manages links, replies, and bounces and the second entry manages your sending domain. When you're using a subdomain, the first and second subdomains can match - unless you're still sending from your old ESP. If you are still sending using your old ESP, the first value

```
```

must be different than the subdomain you use with your current ESP. The DKIM can, and should, be the same as your current sending subdomain so you can continue to leverage your existing sending reputation.

2. Open a support case requesting a private domain.
   a) Go to Bronto's support page and click Open Support Request.
   b) Enter Private Domain Request in the Subject box.
   c) Enter Private Domain in the Application Feature Affected box.
   d) Enter your domain/subdomain information in the Reproducing The Issue & Description box.
   e) Make sure I authorize Bronto Support to access my account and customer data for support purposes is checked.
   f) Click Submit Request.

When Bronto support receives your request, a support professional will update your account and notify you when your private domain has been activated.

After your private domain is set up there are a few things you need to do. If:

- Your domain was migrated from another ESP, set up a hosted URL for the unsubscribe links in messages sent by your previous provider.
- You want to host a Bronto webform on your site, set up an SSL certificate in order for secured (HTTPS) subdomain traffic to work properly.
- Your domain doesn't have a good reputation, implement a warm up strategy.

Related Topics

DNS record types
Tracking URL Parameters on page 1353
You can append additional parameters onto tracking URLs.

Legacy Conversion Tracking

Warm Up Your Sending Domain Reputation

Your sending domain needs to have a good sending reputation or messages will never make it to your contact's inboxes. A warm up strategy can be used to help improve the sending reputation of a private sending domain.

Gmail tracks your sending domain's contact engagement record and use this to assign a reputation. While other providers have traditionally used IP-based tracking, they're also starting to associate sending reputation with domains. When you send to contacts who are engaged and opted-in, your domain reputation should be good with these providers. But if a service provider receives a lot of complaints, particularly over a short period of time, your reputation will be damaged. A high number of bounces and a low open or click rate can also damage your reputation.

When you start sending from a new domain, you have no reputation and will need a warm up plan to establish a good one. When you have no reputation, sending volume is also heavily considered. If a provider suddenly sees a high-volume of activity from a new domain, it's likely to mark your messages as spam. This will damage your reputation and possibly get your domain marked as a spammer. While it's tempting to send to as many of your most engaged contacts as possible right away, a warm up should be gradual.

Whether you have no reputation or a bad one, implementing a plan where you send to opted-in contacts who engage with your messages can help establish a good reputation. You can only warm up one service at a time, so if you need to warm up your domain reputation with multiple providers you will need to run multiple warm up plans. For example, you would need separate Gmail and Hotmail plans.
**Determine Your Total Sending Volume**

The success of a warm up plan is contingent upon gradually sending messages to all of your opted-in contacts who use the email service that you have issue with. First, you need to figure out how many contacts you have to work with. When you know the total number of contacts that can be sent to, you can use engagement metrics to divide these contacts into groups.

1. Determine what email service you want to warm up. For example, Gmail.
   
   If you want to warm up more than one, you will need to engage in a separate warm up plan for each.

2. Calculate the total number of opted-in contacts you have emailed on this service in the past 2 years.

3. Find the number in this table that is closest to your total number of opted-in contacts, rounding down if necessary.

Identify the number of groups you'll use in your plan by looking in the second column of this table.

**Table 32:**

<table>
<thead>
<tr>
<th>Number of Contacts</th>
<th>Total Number of Sends To Complete Warm Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>1</td>
</tr>
<tr>
<td>40</td>
<td>2</td>
</tr>
<tr>
<td>80</td>
<td>3</td>
</tr>
<tr>
<td>160</td>
<td>4</td>
</tr>
<tr>
<td>320</td>
<td>5</td>
</tr>
<tr>
<td>640</td>
<td>6</td>
</tr>
<tr>
<td>1,280</td>
<td>7</td>
</tr>
<tr>
<td>2,560</td>
<td>8</td>
</tr>
<tr>
<td>5,120</td>
<td>9</td>
</tr>
<tr>
<td>10,240</td>
<td>10</td>
</tr>
<tr>
<td>20,480</td>
<td>11</td>
</tr>
<tr>
<td>40,960</td>
<td>12</td>
</tr>
<tr>
<td>81,920</td>
<td>13</td>
</tr>
<tr>
<td>163,840</td>
<td>14</td>
</tr>
<tr>
<td>327,680</td>
<td>15</td>
</tr>
<tr>
<td>655,360</td>
<td>16</td>
</tr>
<tr>
<td>1,310,720</td>
<td>17</td>
</tr>
<tr>
<td>2,621,440</td>
<td>18</td>
</tr>
<tr>
<td>5,242,880</td>
<td>19</td>
</tr>
<tr>
<td>10,485,760</td>
<td>20</td>
</tr>
<tr>
<td>20,971,520</td>
<td>21</td>
</tr>
<tr>
<td>41,943,040</td>
<td>22</td>
</tr>
<tr>
<td>83,886,080</td>
<td>23</td>
</tr>
<tr>
<td>167,772,160</td>
<td>24</td>
</tr>
<tr>
<td>335,544,320</td>
<td>25</td>
</tr>
</tbody>
</table>
### Identify And Group Engaged Contacts

Now that you know how many groups of contacts you will use, we need to make sure your smallest groups have your most engaged contacts. Sending to your most engaged contacts first will boost a domain's warm up rate. To do this, you will use historical click and open metrics from your previous ESP to determine contact engagement.

<table>
<thead>
<tr>
<th>Number of Contacts</th>
<th>Total Number of Sends To Complete Warm Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>671,088,640</td>
<td>26</td>
</tr>
<tr>
<td>50</td>
<td>1</td>
</tr>
<tr>
<td>150</td>
<td>2</td>
</tr>
<tr>
<td>650</td>
<td>3</td>
</tr>
<tr>
<td>1,650</td>
<td>4</td>
</tr>
<tr>
<td>3,650</td>
<td>5</td>
</tr>
<tr>
<td>7,650</td>
<td>6</td>
</tr>
<tr>
<td>15,650</td>
<td>7</td>
</tr>
<tr>
<td>31,650</td>
<td>8</td>
</tr>
<tr>
<td>63,650</td>
<td>9</td>
</tr>
<tr>
<td>127,650</td>
<td>10</td>
</tr>
<tr>
<td>255,650</td>
<td>11</td>
</tr>
<tr>
<td>511,650</td>
<td>12</td>
</tr>
<tr>
<td>1,023,650</td>
<td>13</td>
</tr>
<tr>
<td>2,047,650</td>
<td>14</td>
</tr>
</tbody>
</table>

4. Continue to the next section to learn how to group contacts.

- **Identify contacts with:**
  - a click through rate of 2.5% or higher
  - a click rate of 10% or higher

  and move them to the top of the list.

3. Sort this group of contacts from highest engagement to lowest engagement based on percentages.

4. Sort the rest of your contacts from highest open rate to lowest open rate.

5. Add a new column to the file called `service_group_name`.

   Replace `service` with the email service you're sending your warm up plan emails to. For example, `gmail_group_name`.

6. Use the `service_group_name` column to assign your contacts to groups.

   Start with the first contact and assign from the top to the bottom of the list based on the numbers in this table. For example, the 50-most-engaged contacts should be assigned `A` in the `gmail_group_name` column. The 100-second-most-engaged contacts should be assigned `B` in the `gmail_group_name` column. And so on.
### Table 33:

<table>
<thead>
<tr>
<th>Contact Numbers</th>
<th>Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 20</td>
<td>A</td>
</tr>
<tr>
<td>21 - 41</td>
<td>B</td>
</tr>
<tr>
<td>42 - 82</td>
<td>C</td>
</tr>
<tr>
<td>83 - 163</td>
<td>D</td>
</tr>
<tr>
<td>164 - 324</td>
<td>E</td>
</tr>
<tr>
<td>1,287 - 2,567</td>
<td>F</td>
</tr>
<tr>
<td>2,568 - 5,128</td>
<td>G</td>
</tr>
<tr>
<td>5,128 - 10,249</td>
<td>H</td>
</tr>
<tr>
<td>10,250 - 20,490</td>
<td>I</td>
</tr>
<tr>
<td>20,491 - 40,971</td>
<td>J</td>
</tr>
<tr>
<td>40,972 - 81,932</td>
<td>K</td>
</tr>
<tr>
<td>81,933 - 163,853</td>
<td>L</td>
</tr>
<tr>
<td>163,854 - 327,694</td>
<td>M</td>
</tr>
<tr>
<td>327,695 - 655,375</td>
<td>N</td>
</tr>
<tr>
<td>655,376 - 1,310,736</td>
<td>O</td>
</tr>
<tr>
<td>1,310,737 - 2,621,457</td>
<td>P</td>
</tr>
<tr>
<td>2,621,458 - 5,242,898</td>
<td>Q</td>
</tr>
<tr>
<td>5,242,899 - 10,485,779</td>
<td>R</td>
</tr>
<tr>
<td>10,485,780 - 20,971,540</td>
<td>S</td>
</tr>
<tr>
<td>20,971,541 - 41,943,061</td>
<td>T</td>
</tr>
<tr>
<td>41,943,062 - 83,886,102</td>
<td>U</td>
</tr>
<tr>
<td>83,886,103 - 167,772,183</td>
<td>V</td>
</tr>
<tr>
<td>167,772,184 - 335,544,344</td>
<td>W</td>
</tr>
<tr>
<td>335,544,345 - 671,088,640</td>
<td>X</td>
</tr>
<tr>
<td>1 - 50</td>
<td>A</td>
</tr>
<tr>
<td>51 - 151</td>
<td>B</td>
</tr>
<tr>
<td>152 - 652</td>
<td>C</td>
</tr>
<tr>
<td>653 - 1,6503</td>
<td>D</td>
</tr>
<tr>
<td>1,654 - 3,654</td>
<td>E</td>
</tr>
<tr>
<td>3,655 - 7,655</td>
<td>F</td>
</tr>
<tr>
<td>7,656 - 15,656</td>
<td>G</td>
</tr>
</tbody>
</table>
Manage Contact Numbers

<table>
<thead>
<tr>
<th>Contact Numbers</th>
<th>Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>15,657 - 31,657</td>
<td>H</td>
</tr>
<tr>
<td>31,658 - 63,658</td>
<td>I</td>
</tr>
<tr>
<td>63,659 - 127,659</td>
<td>J</td>
</tr>
<tr>
<td>127,660 - 255,660</td>
<td>K</td>
</tr>
<tr>
<td>255,661 - 511,661</td>
<td>L</td>
</tr>
<tr>
<td>511,662 - 1,023,662</td>
<td>M</td>
</tr>
<tr>
<td>1,023,663 - 2,047,663</td>
<td>N</td>
</tr>
</tbody>
</table>

7. Create a Bronto contact field to store the engagement information.

The Bronto field name must be an exact match to the `service_group_name` column heading in your contact import file or the data will not be imported properly. Once imported, you will use this field to create segments you can use to send strategically.

The correct Type for this field is Text.

8. Upload your contact file into Bronto using the Add or Update Contacts option.

**Send Strategically**

After your contacts are in Bronto you can create segments and use them to implement your warm up plan. For most people, sending a new warm up message once per day works best. However, this frequency can be increased when your warm up plan is going well. When you run into engagement issues, stop sending and try to troubleshoot what caused the issue before you resume sending in order to avoid further damaging your reputation.

1. Use the `service_group_name` contact field to create a unique segment for each group.

When you create each segment, make sure to use Text for the contact field type, Is for the operators, and Group Name (for example A) for the value as your segment criteria. Make sure each segment matches the total number of contacts that should be in the segment. For example, if group A isn't a group of 50 contacts, something went wrong either when you updated or imported your contact file.

2. Send to segment A, which will target your 50 most engaged contacts.

3. Wait 1 day and check the contact engagement.

You can use Bronto's delivery report to look at engagement. If your click and open rates were high and your bounce and unsubscribe rates were low, engagement is good and you can move forward with the warm up plan.

If engagement isn't good, don't resend to any contacts who haven't engaged. Also, consider waiting to send the next message to allow more time for contact engagement.

4. When you're comfortable with engagement from your first send, send a message to segment B.

This should be your next 100 most engaged contacts.

- If you typically send messages daily, send a new message to contacts on segment A who engaged with your last message and the same message to segment B.
- If you're typically a weekly sender, send the same message to segment B.

5. Wait 1 day and check contact engagement for segment B on your delivery report.

If engagement is good then continue to send. If engagement is poor, make sure you don't resend to problematic contacts.

6. When you're comfortable with engagement from your last send, send a message to segment C.

- If you're a daily sender, send a new message to the previously engaged contacts from segments A and B and the same message to segment C.
- If you're a weekly sender, send the same message to segment C.
7. Continue to check contact engagement and to double your sending volume with each send until you've sent to every segment.

Daily senders should send to all previously-engaged warm up contacts every day. Weekly senders can send to all previously-engaged warm up contacts after 1 week of warm up sending.

Closely monitor your contact engagement and sending reputation with each send and stop sending and regroup as soon as you see a negative trend. If you see your open rate plummet - particularly to less than 1%, it's possible that your reputation has crashed, but this may be temporary. Continue sending for 2 more days to 2 additional segments and see if the open rate rebounds. If not, go back to the last most successful segment send and try again. If you catch and fix the issue quickly, it will be much easier to recover your reputation.

Things to consider:

• As sends start to include less engaged contacts, your open rate will naturally decline. Follow a 90:10 (engaged:unengaged) mix rule to trickle in the unengaged contacts with each send. If you see a significant drop-off, send to a smaller portion of your unengaged list. Over time, you may want to stop sending to some of these unengaged contacts or pursue a re-opt-in or last chance campaign.
• Are you sending to the same non-engaged contacts again and again? Filter out contacts who don't engage with your warm up messages as you start resending to contacts.
• Are you sending too many messages too frequently so the email provider marks your messages as spam? If a provider doesn't trust you and you send "too frequently" your contacts will never have a chance to engage because your messages will go straight to spam. If you see a high bounce rate, try sending to smaller groups of engaged contacts and gradually increase your sending volume and frequency as your reputation improves.
• Are contacts not engaging with your messages because of an ineffective subject line? If you aren't seeing a lot of bounces or complaints, but your open rate is still low, consider adjusting your subject line.

If engagement continues to be good and your domain's reputation shows improvement, consider accelerating your sending strategy to more than once per day.

8. Continue to check your domain's reputation as you warm it up. When your domain reputation is high again, you can continue normal (responsible) sending practices.

Note: If you don't have engagement metrics to go by, you can still follow this plan by just sending to contacts who use the service provider you need to warm up.

FAQs:

• Typical sending cadence is once per day. This can be accelerated if things are going well, or slowed down if you run into issues.
• Make sure that your earliest sends are to your most recently engaged contacts. When you don't have contact engagement information, send to any contacts but make sure to closely monitor the results of each send.
• Daily senders can resend to previously-engaged warm up contacts every day, as long as these contacts are sent a new message.
• Weekly senders can resend to previously-engaged warm up contacts after 1 week.
• When you resend to contacts during the warm up plan, those contacts should not be counted in the total number for the day.

SSL Certificates, Private Domains, And Webforms

If you use a private domain and want to host a Bronto webform on your site, we recommend you host an SSL certificate with Bronto in order for secured (HTTPS) subdomain traffic to work properly.

When you use a private domain, Bronto uses the HTTP protocol to route traffic to your subdomains. This can cause an issue when you want to use an HTTPS link to route traffic to a secured location. For example, a contact will see a browser-based security error when trying to submit an Add Contacts webform that's stored on a secure website due to the contact trying to access an HTTPS location using the HTTP protocol.

SSL certificates can be used to ensure fully-encrypted communications, which will allow your contacts to reach HTTPS secured webforms via Bronto without issue. To set up SSL certificate hosting for your account with Bronto:

1. Record the following for your site:
2. Contact Bronto support.

Let support know you use a private domain and need Bronto to generate a Certificate Signing Request (CSR). Provide the information listed in step 1 so Bronto can complete the CSR request.

3. Wait for support to provide you with the CSR that has been created by Bronto for your organization.

4. Use the CSR provided by Bronto to purchase a Geotrust-issued SSL certificate.

The certificate should match these specifications:

- Key Length = 2048bits
- Public Key Type = RSA
- Signature Algorithm = SHA256 + RSA
- CN = Domain you are trying to secure
- Expiration = Set this to as long as possible. You will need to acquire an updated certificate and provide the updated details to Bronto every time your certificate expires.

Bronto's preferred GeoTrust subsidiary is RapidSSL, but you can use any of these to obtain your SSL certificate:

- RapidSSL - https://www.rapidssl.com/
- Entrust - http://www.entrust.com/
- GlobalSign - http://www.globalsign.com/
- VeriSign - http://www.verisign.com/

5. After you've received the SSL certificate, contact Bronto support so they can guide you on providing the certificate to Bronto.

Make sure you have your support case number and certificate details ready when you reach out.

Keep in mind that you have to renew your SSL certificate and send the new details to Bronto every time it is set to expire.

**General Account Settings**

General account settings let you manage the settings for your account.

The **General Account Settings** page lets you adjust several settings that help you to better manage your account.

**Change The Site Name For Your Account**

The Site Name section lets you specify the name that will appear in the sign in URL for your account, as well as the From Address for email messages sent using the Reply Tracking/Domain Keys option.

You can also set the **From Address** for email messages sent using the Reply Tracking/Domain Keys option.

**Tip:** DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email. This digital signature is verified by the receiving mail server to ensure that it is not forged. To enable DKIM, you must enable Sender Authentication when scheduling an email message to be sent. DKIM can optimize your email message delivery to Hotmail, MSN, and Yahoo! email addresses.

To change the site name for your account:

1. Go to **Home** > **Settings**.
2. Click **General**.
3. In the **Site Name** section, enter the site name you want to use.
4. Click Save.

**Add An Emergency Contact Email Address**
The *Emergency Contact Email Address* section lets you specify an email address that will be notified when an email message is unable to be sent.

Typically an email cannot be sent due to it exceeding the email allocation for your account.

1. Go to **Home > Settings**.
2. Click **General**.
3. In the **Emergency Contact Email Address** section, enter then email address you want to use.

4. Click **Save**.

**Set A Bounce Limit For Your Account**
The *Bounce Limit* section lets you pick the number of times contacts can consecutively bounce without recorded activity before they are automatically unsubscribed.

Understanding what a bounce is and how we keep track of bounces can help you choose which bounce limit is right for you. For more information on bounces, see *Email Bounce* on page 196.

Not all types of bounces get counted towards the bounce limit. For more information on how bounces are classified and which bounces count toward the bounce limit, see *Email Bounces with Bronto* on page 197.

Note: Only users with administrative permissions can set the bounce limit for an account. For more information on granting a user administrative permissions, see *Grant A User Admin Permissions* on page 1342.

1. Go to **Home > Settings**.
2. Click **General**.
3. In the **Bounce Limit** section, select the number of bounces.
   - You are able to choose between 3 and 7 bounces. The default is set to 5 bounces.

4. Click **Save**.

**Related Topics**
*Email Bounce* on page 196
An email bounce is an automated message about a delivery failure.

*Email Bounces with Bronto* on page 197

**Set Email Frequency Caps For Your Account**
You can set email frequency caps to avoid sending too many emails too frequently to your contacts.

Email frequency caps allow you to specify the maximum number of emails that can be sent to your contacts over given time periods. This is a valuable resource if you are sending automated messages, because you no longer have
to worry about automated messages, promos, and other marketing efforts overwhelming your contacts and inducing what is known in email marketing as “contact fatigue”.

On the other hand, this setting can affect how long it takes to prepare a bulk delivery to send. During delivery preparation, Bronto will evaluate contacts in a delivery to see if they meet your account's email frequency cap setting and each setting (daily, weekly, monthly) will be evaluated independently. If your delivery includes a large number of contacts, and/or you've set multiple frequency caps, it could take longer than normal to prepare your delivery to send.

For example, checking to see if any of 1 million contacts have received an email from you in the last day, then checking if the remaining contacts have received 3 emails from you within the last month, will take much longer than checking if 50,000 contacts have received 3 emails from you in the last week. Therefore, when you set up your email frequency cap, carefully balance the need to avoid contact fatigue with the need to schedule large deliveries.

This setting will not delay automated messages or transactional messages. Also, you have the option to override your default frequency cap setting while scheduling a bulk delivery.

1. Go to Home > Settings.
2. Click General.
3. Scroll down to the Email Frequency Caps section.
4. Check the box next to the frequency cap you want to enable.

You can enable a daily, weekly, or monthly frequency cap.

5. In the text box, enter the max number of emails a contact can receive in the past day, past week (7days), and/or past month (30 days).

A blank value means no frequency cap has been set.
6. Click Save.

Set Up Test Message Delivery Options
You can set up your account to send text and HTML versions of test delivery messages and to include text before the subject line of each test message.

If you enable sending separate text and HTML versions of a message on the General Settings page, when a test delivery is made, two different deliveries are created:

• One delivery will have the regular (HTML) version of the message.
• The other delivery will be the plain text version.

Each delivery is treated separately for accounting/tracking purposes.

You can also use the Prefix the subject of all test sends with: box to pre-append text to your test messages. The text you enter in this box will be added before the subject line of every test message that is sent from your account. A space is automatically added between the prefix and subject line. For example, if you enter testmail in the Prefix the subject of all test sends with: box, when you send a test email with the subject line Welcome Back the subject line of the test email will read testmail Welcome Back.

Contacts will see the prefix in the subject line when they receive the email and you will see the subject line with the prefix when you view messages in your account. This allows you to quickly and easily identify which messages are test messages in Bronto. The text is only applied to the subject line of test messages that are sent after the prefix text is saved on this page. If you send the same email as a regular message the prefix will not be added to it. If you change
Manage or remove the Prefix the subject of all test sends with: text on this page, the subject line of previously sent test messages will retain the prefix that was set at the time the message was sent.

For information about how to send a test message see Send Test Email Deliveries on page 320.

To configure your test message delivery options:

1. Go to Home > Settings.
2. Click General.
3. Scroll down to the Test Message Delivery Options section.
4. Optional: If you want to test emails with both an HTML and plain text version of the message, select the Send text and HTML versions of message separately box.
5. Optional: If you want the subject line of your test messages to include a prefix, enter the prefix in the Prefix the subject of all test sends with: box.
6. Click Save.

Related Topics
Send Test Email Deliveries on page 320

Enable Message Approval Prior To Send
When you enable the message approval prior to send feature, all messages must be approved before they can be sent. Only users who have been given message approval permissions can approve a message to be sent. Once a message is approved, the message can be sent as usual.

1. Go to Home > Settings.
2. Click General.
3. Scroll down to the Message Approval section.

   Message Approval
   
   - Require messages to be approved before sending
   - Require messages to be re-approved whenever they are edited

4. Check the box next to Require messages to be approved before sending.
5. Optional: Check the box next to Require messages to be re-approved whenever they are edited.
6. Click Save.

   For more information on how to approve messages or request message approval, see Grant Or Request Message Approval on page 294.
   
   For more information on granting message approval permissions, see Grant A User Message Approval Permissions on page 1339.

Related Topics
Grant Or Request Message Approval on page 294
Grant A User Message Approval Permissions on page 1339

Set Up The Text Preference Option For Your Contacts
You can give your contacts the option of choosing to receive messages in text format.
The **Text Preference Option for Contacts** option adds a checkbox to your webform or **Manage Preferences** page that lets your contacts choose between receiving text only or HTML messages.

1. Go to **Home > Settings**.
2. Click **General**.
3. Scroll down to the **Text Preference Option for Contacts** section.
4. Check the box next to **Allow contacts to choose between receiving text and HTML messages**.

![Text Preference Option for Contacts](image)

5. Click **Save**.

**Configure Default Sender Options**

You can configure default sender options that will be used each time your account sends an email, unless you specify different sender options when you schedule the message.

Sender options include your from name, from email address, a reply-to email address, the ability to turn off sender authentication, and the ability to enable reply tracking.

To configure default sender options:

1. Go to **Home > Settings**.
2. Click **General**.
3. Scroll down to the **Default Sender Information** section.
4. Enter the name you want contacts who receive messages to see in the **From Name** box.
5. Enter the email address you want your email message to appear from in the **From Email Address** box.
6. Enter the email you want the platform to forward email replies to in the **Reply-To Email Address** box.
7. If you want to disable sender authentication, click the **Enable Sender Authentication** box to remove the check mark and disable it.

   We do not recommend disabling sender authentication. Sender authentication will sign your email message with DomainKeys/DKIM. DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email. This digital signature is verified by the receiving mail server to ensure that the email is not forged.

8. If you want to enable reply tracking, click the **Enable Reply Tracking** box to select it.

   Enabling Reply Tracking will store a copy of all email replies to your email messages on the **Email Replies** page. You may find this option convenient if you need someone other than the email address in the **From Email Address** line to read email replies, or simply want the application to store email replies.

9. Click **Save** to save your changes.

   Any other changes you made to other sections of the **General Settings** page will also be saved.

**Set A Default Throttle Time For Your Account**

Setting a default throttle time allows you to control the default delivery rate used when scheduling email deliveries.

![Default Throttling Time](image)

**Note:** You will still be able to choose a different value when scheduling an email delivery if need be.
Tip: Many major ISPs track a sender's reputation based on the number of unsolicited email complaints that they generate over a certain period of time. The worse your sender reputation is with ISPs, the more likely you are to have a low sender rating in the application. Spreading your email delivery over time can help mitigate the impact of this issue, help ensure optimal deliverability, and mitigate traffic spikes on your website. For example, 20 unsolicited email complaints received over 8 hours, though certainly undesirable, will be a softer blow to your sender reputation and sender rating than the same 20 complaints received over 15 minutes.

For more information on scheduling email deliveries, see Send Email on page 279.

To set the default throttle time for your account:

1. Go to Home > Settings > General.
2. Scroll down to the Default Throttling Time section.
3. From the Send Emails pull-down menu, select the default throttling time. You can select:
   - as quickly as possible
   - over at least 2 hours
   - over at least 4 hours
   - over at least 6 hours
   - over at least 8 hours
   - over at least 10 hours
   - over at least 12 hours
   - over at least 14 hours
   - over at least 16 hours
4. Click Save.

Handle Failures of Webpage Message Refresh
You can configure Bronto to automatically stop sending a bulk delivery if the refresh of a webpage message in the delivery is failing.

Webpage messages can be configured to automatically refresh before sending. If that refresh process fails (for example, if the connection to the server times out), then an in-app alert will be displayed. You have the option of configuring the platform to automatically stop the delivery of a message that includes a webpage message when the refresh fails.

To automatically manage webpage refresh failures:

1. Go to Home > Settings.
2. Click General.
3. Scroll down to the Handling Failures of Webpage Message Refresh section.
4. Click the Don't send bulk deliveries of webpage messages if refreshing the message fails box to select it.
5. Click Save to save your changes.

Any other changes you made to other sections of the General Settings page will also be saved.

Set Up Notifications When A Delivery Is Skipped
You can set up notifications in the application that notify you when a delivery is skipped.

When a delivery is skipped, the following will happen:
Skipped Delivery Notification

Deliveries may be skipped due to a variety of reasons such as no potential recipients, out of allocation, Social authentication issues, etc. An in-app alert will be displayed to the user who scheduled the delivery. The option below will send an email to the emergency email address as well as the email address associated with the user who scheduled the delivery. The email will contain delivery information as well as the reason why the delivery was skipped.

- An in application alert will be shown to the user who scheduled the delivery.
- An email containing information on the skipped delivery will be sent to the email address associated with the user who scheduled the delivery, and the emergency contact email address.

Tip: For more information on setting up an emergency contact email address, see Add An Emergency Contact Email Address on page 1330.

A delivery may be skipped for any of the following reasons:
- The delivery email delivery was scheduled to go to zero recipients.
- There are no more emails left in your email allocation.
- There were authentication issues with the social network (applies to Twitter and Facebook posts).

To set up notifications for skipped deliveries:

1. Go to Home > Settings > General.
2. Scroll down to the Skipped Delivery Notification section.
3. Click the Send email notification about skipped deliveries checkbox.
4. Click Save.

Select A Default Header And Footer For Emails

You can pick a default header and footer that will be selected by default when creating new email messages in your account.

You can select a different header or footer when creating an email message, but if you don't, the defaults you select here will be used.

For more information on creating headers and footers see Headers And Footers on page 142.

To select a default header and footer:

1. Go to Home > Settings > General.
2. In the Default Headers and Footers section, select a default header using the Default Header pull-down menu.
3. Select a default footer using the Default Footer pull-down menu.
4. Click Save.

Related Topics
Headers And Footers on page 142
You can create headers and footers that can be used across multiple messages.

Set Up The Application To Remember The Last Page Your Were On

You can configure Bronto to remember the last application page you were on when you were logged out.
If this feature is enabled, when you return to the application after your session expires or after closing your browser, you will be taken back to the last page you visited, rather than the Home Dashboard. To enable this feature, click the **Start at previous location after logging in** checkbox.

**Users**

Users are separate logins for different people that need to access your account.

Every Bronto account can have a maximum of 10 users. Multiple users in your account makes team collaboration easy. For example, users in different departments might have separate permissions that grant access only to the lists and fields related to their departments.

The **Users** page lets you view and delete existing users, edit user permissions, create new users, and arrange and sort how users are displayed.

**Note:** There is no limit to the number of users who can be logged into the platform at the same time or made an admin.

**Create Users**

You can create additional users for your account.

If multiple people are going to be using your account, creating individual users is a great way to organize who can sign in to your account, and what privileges they have once they are signed in. Below you will find instructions describing how to create users.

The first step in organizing who has permission to access your account is to create users.

**Note:** We require that all passwords contain at least 6 characters. We also require that all usernames contain at least 4 characters, and we recommend that you use email addresses for usernames.

You can apply additional security around user logins and passwords by adjusting the security settings. For more information on adjusting the security settings, see [Set Up Login Security](#) on page 1344 and [Set Up Password Security](#) on page 1345.

To create users:

1. Go to **Home > Users**.
2. Click **Create New User**.
3. Fill in the Login Information and Additional Details for the user you are creating.
4. Click **Save**.

You will be taken to that individual user's page. You will see a green box with a check mark inside of it that says “User added”. The page title will read “User:(Name of user you just created)”. The user is now created.

**Related Topics**

[Set Up Login Security](#) on page 1344

The login security settings allow you to add additional security measures around user logins.

[Set Up Password Security](#) on page 1345

The password security settings allow you to add additional security measures around user passwords.

**User Contact Info**

You can view the contact information for users in your account.

In the **Contact Information** section on the **User Information** page, you can view the name, email, phone number, and other contact information for an individual user.
To get to the User Information page, go to Home > Users and click on a user name.

Edit A User's Contact Information
You can edit the contact information for users in your account.

To edit a user's information:
1. Go to Home > Users.
2. Click on a user name.
3. Click Edit Contact Information.
4. Make any edits to the user's information.
5. Click Save.

View A User's Permissions Settings
You can view a users permission settings.

In the Permissions section on the User Information page, you can see all the features a user has been given access to. A blank box ☐ indicates that the user does not have permission to use the feature. A checked box ☑ indicates that the user has permission to use the feature.

To get to the User Information page, go to Home > Users and click on a user name.

For more information on editing a user's permissions, see User Permissions on page 1338.
Change A User's Password
You can change a user's password.

To change a user's password:
1. Go to Home > Users.
2. Click on a user name.
3. Click Change Password.
5. Re-type the new password in the Confirm Password text box.
6. Click Save.

Reset A User's Security Question
You can reset the security question for users in your account.

To reset a user's security question
1. Go to Home > Users.
2. Click the key icon 🪜 in the row associated with the user whose security question you want to reset.
3. Click the Reset the User's Security Question checkbox.
4. Click Save.

When the user attempts to login again, they will be required to pick a new security question and provide an answer for that question.

User Permissions
Setting user permissions allows you to control which features specific users have access to.

A good example of when this would be useful is if you have users spanning multiple departments within your company. Users in one department might not need access to lists, segments, and fields related to another departments' data. By managing user permissions, you can allow users to view all or only specified lists, segments, and fields. Also, you can disable a user's ability to create new lists, segments, and fields.

User Permissions - Contact Management
Administrators have the ability to manage what permissions each Bronto user has when it comes to working with contact data.

Users can have the ability to:
- View contacts using the Search Contacts page.
- Edit, create, or delete contacts.
- Export consent records for either individual contacts or all contacts.

To grant a user the ability to manage and view contacts:
1. Go to Home > Users.
2. Click a user's name.
3. Click Edit Permissions.
4. Click Manage contacts to grant the user the ability to create new contacts, edit existing contacts, and delete existing contacts in their account.
   If you allow a user to manage contacts, but not view contacts, then they will be able to create contacts, but not actually view them. Users who can view, but not manage contacts, will not be able to create, edit, or delete contacts.
5. Click View contacts to allow the user to view contacts and contact related data, such as viewing contacts on a particular list or segment.
6. Click Site Consent Records Export to allow the user to export the consent records for all contacts on your site.
Because consent records contain confidential contact information related to GDPR, you might want to limit the ability to export these records to users who specifically manage contact consent.

7. Click Single Contact Consent Record Export to allow the user to export the consent record for individual contacts.

8. Click Save All Changes.

Set Message Composition And Delivery Permissions For A User

To set the message composition and delivery permissions for a user:

1. Go to Home > Users.
2. Click a user's name.
3. Click Edit Permissions.
4. Click Messages.
5. Your can choose the following options by clicking the corresponding checkboxes:
   - The ability to create new messages
   - The ability to delete messages
   - Clicking the Use of a basic editor rather than the full What-you-see-is-what-you-get (WYSIWYG) editor checkbox will only allow the user to have access to the basic WYSIWYG editor used in composing messages. The Basic WYSIWYG editor is a stripped down version of the regular WYSIWYG editor that only contains the basic buttons. The buttons contained on the Basic WYSIWYG Editor are Bold, Italic, Underline, Select text color, Select background color, Insert/edit link, Unlink, Outdent, Indent, Align left, Align center, Align right, Align full, Ordered list, Unordered list, Toggle Spellchecker, Field tags pull-down, and Special tags pull-down.
   - Clicking the The ability to override Email Frequency Cap settings checkbox allows the user to send messages in excess of the restrictions put in place by contact frequency caps.
   - Tip: For more information on email frequency caps, see Set Email Frequency Caps For Your Account on page 1330.
6. Click Save.

Related Topics
Set Email Frequency Caps For Your Account on page 1330
You can set email frequency caps to avoid sending too many emails too frequently to your contacts.

Grant A User Message Approval Permissions

Message approval permissions allow a user to approve messages to be sent.

The message approval feature must be enabled for you to grant this permission to a user. For more information on enabling the message approval feature, see Enable Message Approval Prior To Send on page 1332.

For more information on how to approve messages or request message approval, see Grant Or Request Message Approval on page 294.

1. Go to Home > Users.
2. Click a user's name.
3. Click Edit Permissions.
4. Click Messages.
5. In the Message Composition and Delivery section, click the Approve messages for sending checkbox.
6. Click Save All Changes.

Related Topics
Enable Message Approval Prior To Send on page 1332
When you enable the message approval prior to send feature, all messages must be approved before they can be sent.
Grant Or Request Message Approval on page 294
Choose Which Messages A User Has Permission To View

The View Messages section, located on the Edit User Permissions Page in the Messages tab, lets you choose which messages a user can view.

To choose which message a user has permission to view:

1. Go to **Home** > **Users**.
2. Click a user's name.
3. Click **Edit Permissions**.
4. Click **Messages**.
5. In the View Messages section, you can click the
   - **All messages** radio button to allow the user to view all messages
   - **No messages** radio button to restrict them from viewing any messages
   - **Only some messages** radio button and then choose specific messages that they can view from the list

   If you choose the **Only some messages** radio button, you will need to click **Choose Messages** and select the messages the user can view.

6. Click **Save All Changes**.

Allow A User To Create And Edit Automated Message Rules

To allow a user to create and edit automated message rules:

1. Go to **Home** > **Users**.
2. Click a user's name.
3. Click **Edit Permissions**.
4. Click **Messages**.
5. In the Automated Message Rules section, click the **Create and edit automated message rules** checkbox to allow the user to create and edit automated message rules.

6. Click **Save All Changes**.

Allow A User To Create, Edit, View, And Deliver To Lists

There is no way to restrict which contacts a user can see. For example, lets say you have a contact that appears on List A and List B, and you restrict a user from seeing List B. The user will still be able to see the contact, just not List B, or the fact that the contact appears on List B. If the user were to view the information about the contact, they also would not be able to tell that the contact appears on List B.

**Note:** If you choose the **Only some lists** radio button, you will need to then click **Choose Lists** and select the lists the user has permission to view, edit, sent to, and/or change contacts on.

To assign list level permissions to a user:

1. Go to **Home** > **Users**.
2. Click a user's name.
3. Click **Edit Permissions**.
4. Click **Lists**.
5. From here you have several permissions you can assign around creating, editing, viewing, and delivering to lists. Each permission is described below:
   - **Create lists** checkbox allows you to restrict a user's ability to create new lists.
   - **Create lists, but not send to them** checkbox allows you a user to create lists, but not actually send any messages to them.
   - **View Lists** section allows you to choose whether a user can view all lists or only specific lists. If you click the **All Lists** radio button, then the user will have the ability to view all the lists in your account. If you click the **Only some lists** radio button, the user will only be able to view the lists you select.
Manage

• **Edit Lists** section allows you to choose whether a user can edit all lists or only specific lists. If you click the **All Lists** radio button, then the user will have the ability to edit all the lists in your account. If you click the **Only some lists** radio button, the user will only be able to edit the lists you select.

• **Send To Lists** section allows you to choose whether a user can send to all lists or only specific lists. If you click the **All Lists** radio button, then the user will have the ability to send to all the lists in your account. If you click the **Only some lists** radio button, the user will only be able to send to the lists you select.

• **Change Contacts On Lists** section allows you to choose whether a user can change contacts (i.e. add and delete contacts from lists) on all lists or only specific lists. If you click the **All Lists** radio button, then the user will have the ability change contacts on all lists in your account. If you click the **Only some lists** radio button, the user will only be able to change contacts on the lists you select.

6. Click **Save All Changes**.

**Allow A User To Create, Edit, And Deliver To Segments**

Note: If you choose the **Only some segments** radio button, you will need to then click **Choose Segments** and select the segments the user has permission to view, edit, and/or send to.

To assign segment level permissions to a user:

1. Go to **Home > Users**.
2. Click a user's name.
3. Click **Edit Permissions**.
4. Click **Segments**.
5. From here you have several permissions you can assign around creating, editing, viewing, and delivering to segments. Each permission is described below:

   • **Create Segments** checkbox allows you to restrict a user's ability to create new segments.

   • **View Segments** section allows you to choose whether a user can view all segments or only specific segments. If you click the **All Segments** radio button, then the user will have the ability to view all the segments in your account. If you click the **Only some segments** radio button, the user will only be able to view the segments you select.

   • **Edit Segments** section allows you to choose whether a user can edit all segments or only specific segments. If you click the **All Segments** radio button, then the user will have the ability to edit all the segments in your account. If you click the **Only some segments** radio button, the user will only be able to edit the segments you select.

   • **Segment Delivery** section allows you to choose whether a user can send to all segments or only specific segments. If you click the **All Segments** radio button, then the user will have the ability to send to all the segments in your account. If you click the **Only some segments** radio button, the user will only be able to send to the segments you select.

6. Click **Save All Changes**.

**Allow A User To Create, Edit, And View Fields**

To assign field level permissions to a user:

1. Go to **Home > Users**.
2. Click a user's name.
3. Click **Edit Permissions**.
4. Click **Fields**.
5. From here you have several permissions you can assign around creating, editing, and viewing fields. Each permission is described below:

   • **Create fields** checkbox allows you to restrict a user's ability to create new fields.

   • **Change field order/position** checkbox allows a user to change the order / position of fields. Changing the order / position of fields affects how they will appear to your contacts, and how they will appear in other locations in the application.
• **View Fields** section allows you to choose whether a user can view all fields or only specific fields. If you click the **All fields** radio button, then the user will have the ability to view all the fields in your account. If you click the **Only these fields** radio button, the user will only be able to view the fields you select.

• **Edit Fields** section allows you to choose whether a user can edit all fields or only specific fields. If you click the **All fields** radio button, then the user will have the ability to edit all the fields in your account. If you click the **Only these fields** radio button, the user will only be able to edit the fields you select.

6. Click **Save All Changes**.

**Grant A User Admin Permissions**

Granting administrator permissions allows a user to have complete access to all features, lists, segments, and fields within your account.

To grant a user administrator permissions:

1. Go to **Home > Users**.
2. Click on a user's name.
3. Click **Edit Permissions**.
4. Click **Other**.
5. Click the **Administrator Permissions** checkbox.
6. Click **Save**.

**Grant A User API Permissions**

Granting API permissions allows the user to sign in via the API. The API (Application Program Interface) provides an open platform for organizations to build and extend software applications. With the API, you can integrate with different software applications and create your own custom email marketing applications.

To grant a user API permissions:

1. Go to **Home > Users**.
2. Click on a user's name.
3. Click **Edit Permissions**.
4. Click **Other**.
5. Click the **API Permissions** checkbox.
6. Click **Save**.

**Lock A User To Prevent Them From Logging In**

There maybe times when you need to lock a user's account and prevent them from logging in to the application (security issue, employee change, etc.).

To lock a user's account:

1. Go to **Home > Users**.
2. Click on a user's name.
3. Click **Edit Permissions**.
4. Click **Other**.
5. Click the **Lock User And Prevent Login** checkbox.
6. Click **Save**.

**Delete A User**

You can delete users in your account.

When you delete a user, the user will lose all access to your Bronto account. Actions the user performed prior to deletion will continue to be displayed in the audit log, but the user's name will no longer be associated with the action.
You also have the option to reduce a user's permissions, lock their account, or change their password if you want to limit the user's access but don't want to lose historical data related to their actions.

To delete a user:

1. Go to **Home > Users**
2. Click the delete icon 🗑️ in the row associated with the user you want to delete.
3. Click **Ok**.

**Settings**

The **Settings** menu allows you to configure the settings associated with your account.

Settings include personal and account settings, security and network access settings, and various application settings.

**Usage Alerts**

You can use the **Usage Alerts** page to configure usage alerts in order to help you monitor your email allocation usage.

It is important to know when you are nearing the email allocation threshold for your account. To help you monitor this, email volume alerts are automatically sent to the email address associated with your account when your utilization hits or exceeds 85%, 90%, 95%, and 99%. On the **Usage Alerts** page you can specify other usage percentages you want to receive alerts at. You also have the option of sending alerts to additional email addresses.

To edit usage alerts:

1. Go to **Home > Settings > Usage Alerts**.
2. Click **Edit Usage Alerts**.

   The **Edit Usage Alerts** page is displayed.

3. Optional: Enter additional email address(es) in the **Usage Alert Email Address** box if you want alerts to go to another email address.

   If you want to enter multiple email addresses, separate each address with a comma. Alerts will still be sent to the email address associated with your account in addition to the specified email addresses.

4. Set the threshold percentages that will trigger usage alert emails.
5. Click **Save**.

**Bronto Labs**

Bronto labs is a testing ground for new features that aren't ready for all customers.
Often these features can present significant changes to existing functionality and workflows, so testing them in labs gives us an opportunity to make sure these changes work for our customers. Bronto labs features are subject to change, and some problems may be experienced while using these features.

**Application Security Settings**

You can adjust your security settings in order to protect your data.

In an effort to protect your data and secure our system, we have implemented several security features that allow you to "lock down" security in a very restrictive manner.

**Set Up Login Security**

The login security settings allow you to add additional security measures around user logins.

To set and/or change the login security settings:

2. Go to the Login Security section. From here, you can adjust the login security settings. Each setting is described below:

   • **Allow user logins from unknown IPs not defined in Network Access** - By going to Home > Settings > Network Access, you can define a set of network IP addresses or IP address ranges from which your users can log in to the application. If these range(s) are defined, and if a user visits from an IP that isn't contained in those ranges, you can click the **Allow user logins from unknown IPs not defined in Network Access** checkbox. Clicking this checkbox allows the user to enter the application, after logging in with their password and answering their security question. This makes it possible for users on the road (in a hotel, at a tradeshow, etc.) to still login even though their IP address isn't on the trusted list.

      **Note:** If this is checkbox is unchecked, then users attempting to access your account from an unauthorized IP will be rejected and will be unable to access the account.

      **Tip:** For more information on setting up trusted IP address ranges, see Configure Network Access on page 1347.

   • **Allow API access from unknown IPs not defined in Network Access** - By going to Home > Settings > Network Access, you can define a set of network IP addresses or IP address ranges from which your users can log in to the application. If this checkbox is checked, API access can come from any IP. If unchecked, API access to the account from an unauthorized IP will be rejected.

   • **Inactive Users Are Locked After** - Having people not log into the application for a long time can be a security risk. The **Inactive Users Are Locked After** pull-down menu automatically forces users to reset their password if they haven't logged in (i.e. have been inactive) for a given period of time. You can choose:

      • Never (default)
      • 1 month
      • 3 months
      • 6 months
      • 1 year
• **Maximum Number of Invalid Login Attempts** - The Maximum Number of Invalid Login Attempts setting allows you to set the limit for failed login attempts. You can choose:
  • 3 attempts
  • 5 attempts
  • 10 attempts (Default)

• **Lockout Effective Period** - When a user reaches the maximum number of invalid login attempts specified above, they will be locked out of their account. You can set the duration of the lockout using this pull-down menu. The options are:
  • Lock account for 5 minutes - The user will not be able to attempt another login until 5 minutes has passed. This further mitigates the possibility of a brute-force attack.
  • Lock account for 15 minutes.
  • Lock account for 30 minutes.
  • Lock account for 1 hour.
  • Permanently lock the account. Unlocking the account will require a Site Administrator to manually edit the user's record and unlock it. Additionally, the emergency contact email address for the site will receive a notice that the account has been locked.

3. Click **Save**.

**Set Up Password Security**
The password security settings allow you to add additional security measures around user passwords.

To set and/or change the password security settings:

1. Go to **Home > Settings > Security**.
2. Go to the **Passwords Security** section. From here you can adjust the password settings accordingly. Each setting is described below:

• **User Passwords Expire After** - The **User Password Expire After** pull-down menu allows you to set a length of time that passwords are allowed to remain active. When the period is over, the user will be prompted to change their password upon their next login. You can choose the following:
  • Never (default)
  • 1 month
  • 3 months
  • 6 months
  • 1 year

   **Tip:** Password expiration can be useful to make sure users change their passwords frequently. This can help you avoid a problem where a password becomes compromised and is used by a malicious intruder to access your system without your knowledge.
• **Expire all user passwords immediately** - This checkbox allows you to immediately force expiration of all user passwords. If you want all users to change their passwords when they next login, you can check this box.

• **Enforce Password History** - The **Enforce Password History** pull-down menu allows you to choose the length of the "history" for which previously used user passwords are remembered. This history is then checked against when a user is changing/choosing a new password. If the password they choose is on the history list, they will not be able to use that password. You can choose the following options:

  • No passwords remembered.
  • Remember previous password - you can't change your password to the one that you used one time before (Default).
  • Remember previous 2 passwords.
  • Remember previous 3 passwords.

  **Tip:** Password history can be used to stop users from bouncing back and forth between a few passwords and not truly choosing a new one.

• **Minimum Password Length** - The **Minimum Password Length** pull-down menu allows you to control how short a password can be. You can choose the following options:

  • 5 characters (Default)
  • 6 characters
  • 7 characters
  • 8 characters
  • 9 characters
  • 10 characters

  **Tip:** Password length can be used to make passwords conform to internal corporate IT policies, etc. Longer passwords are also generally more secure.

• **Password Strength / Complexity** - The **Password Strength / Complexity** pull-down menu allows you to apply several different levels of checks to passwords in an effort to ensure they are "strong." If a password does not pass the check, the user will not be allowed to use it. Check levels include:

  • Minimal - Will check for commonly used "bad" passwords and common strings on the keyboard (1234, asdf, etc.). (Default)
  • Must contain both letters and numbers - This is a "medium" type of password security setting and states that the password must contain both letters and numbers.
  • Must contain upper and lowercase letters, numbers, and at least one special symbol - This setting requires that a password contain upper and lowercase letters, numbers, and at least one special symbol. If you want the highest level of password security, you should choose this setting.

3. Click **Save**.

**Set Up Session Security**
The session security settings allow you to add additional security settings regarding a session (i.e. the time a user is logged in to an account).

To setup session security:

1. Go to **Home > Settings > Security**.

The session security section is located near the bottom of the page.
2. Go to the Session Security section. From here you can adjust the session security parameters. You can adjust the following settings:

- **Inactive Session Timeout** - The Inactive Session Timeout pull-down menu allows you to control how long an inactive session will last before the user is automatically logged off. Shorter inactive sessions are more secure, especially in shared/busy office environments. You can choose the following options:
  - 1 hour
  - 2 hours (Default)
  - 4 hours
  - 6 hours
  - 8 hours

- Lock sessions to the IP address from which they originate - Clicking this checkbox can strengthen session security by making it much harder for "session hijacking" to take place.

  **Warning:** This setting can POTENTIALLY cause issues if you have a firewall or other network device that automatically changes the originating IP address for each HTTP connection for a user. This is an unusual situation, but a real one. If this checkbox is checked, users will have to start a new session if they enter the application from a different IP address, even if they were already logged in with that session previously. Leaving the box unchecked does not enforce this restriction and mimics current behavior.

**Configure Network Access**

You can restrict the network IP addresses that can be used to log into the application.

By going to Home > Settings > Network Access, you can define a set of network IP addresses or IP address ranges from which your users can login to the application.

![Network Access](image)

**Note:** Users attempting to access your account from an unauthorized IP will be rejected and will be unable to access the account. If you go to Home > Settings > Commerce, you can configure settings that allow your users to login to the application and/or API from IP addresses not part of the ranges specified on the Network Access page.

For information on configuring the Application Security settings, see Application Security Settings on page 1344.

To configure network access IP address ranges:

2. Click Add New IP Address / Range.
3. Add a Starting and Ending IP Address in the appropriate text boxes.

**Add / Edit Network Access IP(s)**

![Add Network Access IP](image)

4. Click Save.
**Update Your Contact Info**

You can change your contact information.

The information you provide on the Contact Information page is extremely important. It is essential that you keep the information on this page up to date to ensure that your email messages are CAN-SPAM compliant.

The address information you supply on the Contact Information page is used to fill in special message tags, such as `%%!account_address%%` and `%%!account_organization%%`. These tags are required to be included in your email message body in order for the message to be CAN-SPAM compliant. For that reason, it is crucial that your contact information remain accurate.

**Tip:** For more information on special tags, see Special Tags on page 152. For information on the CAN-SPAM act and CAN-SPAM compliance, see CAN-SPAM Act on page 200.

**Contact Info Settings**

You must provide your company or organization name and full postal mailing address in every message in order to be CAN-SPAM compliant.

<table>
<thead>
<tr>
<th>Organization Name:</th>
<th>Bronto Software, Inc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td>Dino</td>
</tr>
<tr>
<td>Last Name:</td>
<td>Bronto</td>
</tr>
<tr>
<td>Email Address:</td>
<td><a href="mailto:bronto@example.com">bronto@example.com</a></td>
</tr>
<tr>
<td>Telephone:</td>
<td>919.555.5555</td>
</tr>
<tr>
<td>Country:</td>
<td>United States</td>
</tr>
<tr>
<td>Address:</td>
<td>324 Blackwell St.</td>
</tr>
<tr>
<td>Address Cont:</td>
<td>Suite 510</td>
</tr>
<tr>
<td>City:</td>
<td>Durham</td>
</tr>
<tr>
<td>State:</td>
<td>North Carolina</td>
</tr>
<tr>
<td>ZIP/Postal Code:</td>
<td>27701</td>
</tr>
</tbody>
</table>

**Warning:**

If your company or organization has several accounts with us, they may share contact information. In this case, you will see a warning. Changing the address information will affect all sites for your company or organization.

To add/update your contact information:

1. Go to **Home > Settings > Contact Info**.
2. Add a name for your organization in the **Organization Name** text box.
3. Add your first name in the **First Name** text box.
4. Add your last name in the **Last Name** text box.
5. Add an email address in the **Email Address** text box.
6. Add a telephone number in the **Telephone** text box.
7. Select a country using the **Country** pull-down menu.
   You will be able to select a different state/county/territory/province based on the country you select.
8. Add an address in the **Address** text box.
9. Optional: Add any address overflow in the **Address Cont:** text box.
10. Add a city/town in the **City** text box.
11. Based on the country you selected, select a state, county, territory/state, or province from the pull-down menu.
12. Add a ZIP/postal code in the **ZIP/Postal Code** text box.
13. Click Save.

**Configure System Formatting**

The Formatting settings dictate the time and date formats that are used in your account and let you set a default character encoding for contact import files.

All application times are dependent on the time zone settings you specify on the Formatting Settings page. For example, if you set your time zone setting to America/New_York, then all time dependent settings in your account (such as message send times) will be set according to America/New_York time.

**Formatting Settings**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Zone</td>
<td>(GMT-05:00) Eastern Time (US &amp; Canada)</td>
</tr>
<tr>
<td>Use the following format for dates</td>
<td>mm/dd/yyyy</td>
</tr>
<tr>
<td>Use the following format for time</td>
<td>12 hour</td>
</tr>
<tr>
<td>Locale</td>
<td>English (United States)</td>
</tr>
<tr>
<td>Use the following character set when importing contacts</td>
<td>UTF-8 (Default)</td>
</tr>
</tbody>
</table>

To edit the formatting settings:

1. Go to **Home > Settings > Formatting**
2. Use the **Time Zone** pull down menu to adjust the time zone used for your account.
   
   **Note:** Any changes made to the timezone settings will only affect report data (opens, clicks, conversions, etc.) going forward. We do not update old data to reflect time zone settings.
3. Select a date format for your account from the **Use the following format for dates** list.
4. Select a time format for your account from the **Use the following format for time** list.
5. Select a locale for your account from the **Locale** list.

   The locale setting effects how numbers are formatted, including the addition of commas to a number.
6. Select a default character set to apply to your contact import files from the **Use the following character set when importing contacts** list.

   This is used to set a default character set encoding that the platform will use when contact files are imported. You also have the option of selecting the appropriate character set encoding on a per contact import basis, as you set up the contact import. By default, **I don't know what my character set is** is selected here. When you indicate you don't know what character set your files use, Bronto will attempt to import the file as UTF-8. After the initial import, the platform runs a validation check on the imported data. If the imported data is not valid UTF-8, Bronto will remove it and reimport the files using ISO-8859-1 (Latin 1) encoding. This does not guarantee the files are using the ISO-8859-1 (Latin 1) character set. You should look at the contact data you imported to make sure it appears as expected.

   For more information about file encoding see **Contact Import Character Sets** on page 1096.
7. Click **Save**.

**Labels**

Labels allow you to group certain objects in the application together.

For example, you could create a label called **Marketing Campaign - October** and then apply that label to segments associated with the marketing campaign you ran in October.

**Add A New Label**

You can add labels in order to be able to group application items.
Labels allow you to group certain objects in the application together. You can then search based on a label.

Currently, labels can only be applied to lists and segments. See Segment Labels on page 497 and List Labels on page 539 for more information.

To add a new label:

1. Go to Home > Settings > Labels.
2. Click Add Label.
3. Add a name for the label in the text box.
4. Click Save Changes.

**Related Topics**

- Segment Labels on page 497
  Segment labels can be used to organize and visually group segments.

- List Labels on page 539
  List labels can be used to organize and visually group lists.

**Edit Existing Label Name**

You can change the name of existing labels.

To edit the name of an existing label:

1. Go to Home > Settings > Labels.
2. Click the pencil icon in the row associated with the label you want to edit.
3. Add a new name for the label in the text box.
4. Click Save Changes.

**Delete A Label**

Deleting a label removes that label from your account. It will also remove that label from any object it was applied to.

You can remove a label applied to a particular object (i.e. disassociating the label and the object), without deleting the label altogether. See Segment Labels on page 497 and List Labels on page 539 for more information about removing labels.

To delete a label:

1. Go to Home > Settings > Labels.
2. Click the checkbox in the row associated with the label you want to delete.
3. Click Delete.
4. Click Delete.

**Related Topics**

- Segment Labels on page 497
  Segment labels can be used to organize and visually group segments.

- List Labels on page 539
  List labels can be used to organize and visually group lists.

**Email Reply Settings**

You can configure how you want to manage email replies to your account.

The email reply settings help to streamline the process of handling the replies to your email messages by filtering out unwanted email replies and delivering relevant email replies to specific people. The email replies settings are applied to email replies that are handled by the application when email reply tracking is enabled for an email delivery.

**Tip:** To enable reply tracking when sending an email, see Sender Authentication And Reply Tracking For Emails.
Automatically Delete Automated Email Replies
You can configure your account to delete auto replies.

In the Automated Replies section, you can enable a setting to automatically delete any email replies that are determined to be automated vacation replies. The application classifies any email containing the text "autoreply" in the subject line as an automated vacation reply. We also examine the headers used in email replies to determine if they are automated replies.

Tip: We recommend that you test out replying to some of the emails you send after enabling this feature to ensure that normal replies are not accidentally getting classified as automated vacation replies.

To enable automatic deleting of automated email replies:
1. Go to Messages > Email Replies.
2. In the Automated Replies section, click the Delete automated (vacation) replies checkbox.
3. Click Save.

Filter Out Email Replies Determined To Be Spam
You can configure your account to automatically delete spam.

In the Spam section you can enable a setting that will delete email replies determined to be spam. Email replies are filtered out as spam based on parameters defined by our spam filtering software.

To filter out email replies determined to be spam:
1. Go to Home > Settings > Email Replies.
2. In the Spam section, click the Delete replies determined to be spam checkbox.
3. Click Save.

Automatically Handle Email Unsubscribe Requests
You can configure your account to automatically manage unsubscribe requests.

In the Unsubscribe Requests section, you can enable a setting that will change the status of contacts to Unsubscribed if their email reply contains specific keywords (defined by you) in the subject line. This option is useful if you want to unsubscribe contacts that produce unwanted email replies that do not get filtered out by the spam or automated vacation reply filters.

Note: Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.

For more information on Transactional Emails, see Transactional Emails on page 294.

To automatically handle unsubscribe requests:
1. Go to Messages > Email Replies.
2. In the **Unsubscribe Requests** section, click the **Handle unsubscribe requests** checkbox.

![Unsubscribe Requests](image)

3. In the text box, add in the keywords that, when found in reply subject lines, will automatically unsubscribe the contact.

4. Click **Save**.

**Related Topics**

*Transactional Emails* on page 294

**Forward Email Replies**

You can configure your account to automatically forward email replies to a specific email address.

In the **Email Forward** section, you can enable a setting that allows you to forward email messages that are not caught by the email reply filters to specific email addresses. This setting helps to streamline your work flow by sending relevant email replies to specific people, instead of having those people login to your account.

**Tip:** For more information on replies stored in your account, see *Email Replies* on page 317.

To forward email replies:

1. Go to **Messages > Email Replies**.

2. In the **Email Forward** section, add a comma separated list of email addresses that you want to forward replies to.

![Email Forward](image)

3. Click **Save**.

**Related Topics**

*Forward Email Replies* on page 1352

*You can configure your account to automatically forward email replies to a specific email address.*

**Enable Click Through Link Tracking**

Enabling Click Through Link Tracking allows you to see where people are clicking in your emails.

Enabling Click Through Link Tracking also allows you to take advantage of several other tracking analytics tools, such as direct update, Web Analytics, and conversion tracking.

Click through link tracking allows you to view the number of clicks (which people clicked on which links) in your tracking reports. Clicks are a great metric because they illustrate individual recipient activity, confirm interest in a linked topic, and make for easy segment creation based on contacts that clicked on certain links.
Warning: If you use click through link tracking, links will no longer work in deliveries whose last send time is outside of the data retention policy.

For more information on the data retention policy, see Data Retention Policy on page 1509.

To set up Click Through Link Tracking:

1. Go to Home > Settings > Data Exchange.
2. Scroll down to the Click Through Link Tracking section and click the Track which contacts follow links off of your messages checkbox.

Related Topics
Data Retention Policy on page 1509
Our Data Retention Policy outlines what data we maintain indefinitely and what data we periodically delete.

Use Branch for Deep Linking for Mobile Apps

If you have a native mobile app, deep links are URLs that direct contacts to specific content inside your app. Enabling deep linking by Branch allows you to convert normal links in your email to deep links. Customers who click a deep link in the email from a mobile device are directed to a specific page in your mobile app or to the app store if the app is not installed.

To use deep links, you need to have an account with Branch.io, a 3rd-party deep linking provider. After you have an account, you can set up and configure your account by following the instructions at https://docs.branch.io/pages/emails/bronto/

Once deep linking is enabled in the Bronto Marketing Platform and configured in Branch, you can determine which links are deep links when you create or edit a message in the Email Message Editor.

To turn on deep linking in Bronto:

1. Go to Home > Settings
2. Click Data Exchange.
3. Scroll down to Branch Deep Linking for Mobile Apps.
4. Select the Enable Branch deep linking for mobile apps checkbox.
5. Enter the Branch deep linking domain name.
6. Click Save.

Related Topics
Add Links In A Message (Email Message Editor) on page 70
You can add links to your messages by including a link as an attribute of an Image, Button, Text, or Text Grid element.

Add Deep Links to Messages on page 74
You can add deep links to messages after you have set up your account with Branch.io and enabled deep linking in Bronto's settings, including adding the deep linking tracking domain.

Tracking URL Parameters

You can append additional parameters onto tracking URLs.

These parameters allow you to change the way in which data is exchanged with Bronto.

When To Use The Tracking URL Parameters
Depending on how you have your tracking system setup, using the Tracking URL Parameters may or may not be the right option for you.
Please consider the following:

- If you are not using a private domain, you should consider using the **Tracking URL Parameters**. For non-private domain users, the cookie created in step 3 of the diagram below is a third-party cookie, thus making it subject to being blocked by browsers.
- If you are using a private domain and the page(s) where Legacy Conversion Tracking or Order Service scripts are hosted are on the same domain as your private domain, then it is not necessary to use the **Tracking URL Parameters**. The reason for this is the cookie created in step 3 of the diagram below will be a first-party cookie in this scenario. First-party cookies will not be blocked by most conventional browser settings.

---

**Tip:** For more information on setting up a private domain, see [Private Domains](#).

**Add Tracking URL Parameters Used To Create First-Party Cookies**

When you enable the **Tracking URL Parameters** feature, two additional URL parameters are added to URLs used in emails you send via Bronto.

**Note:** If you use Order Service, do not set this feature up on the **Data Exchange** page. Instead, see [this help topic](#) for information on how to set these parameters on the **Commerce** page.
These parameters allow the application to create first party cookies. The following URL parameters are added:

- `_bta_tid` - This parameter is a unique ID that identifies the contact who clicked the link, and the delivery the link was contained in.
- `_bta_c` - (Only used with the addConversionLegacy method) - This parameter is used to identify unique conversions when using the addConversionLegacy method.

For more information on deciding when to use the Tracking URL Parameters feature, see When To Use The Tracking URL Parameters on page 1353.

Provided you have Click Through Link Tracking enabled, when a contact clicks a link contained in an email you send them via Bronto, we create a tracking cookie (most commonly used for tracking conversions). If the domain the URL points to is different from your domain, then the cookie created will be a third-party cookie. Third-party cookies may be blocked, depending on your contacts' browser settings, resulting in a loss of tracking data. In contrast, first-party cookies are much less likely to be blocked, thus ensuring that conversions are tracked.

For more information on Click Through Link Tracking, see Enable Click Through Link Tracking on page 1352.

Note: When using the Tracking URL Parameters, you should add the JavaScript tracking snippet on any page that you might link to in emails you send from the application. This will ensure that a first-party cookie gets created each time a contact clicks from an email you send them, to a page on your site. Creating the first-party cookie helps to ensure that conversions made on your site get tracked.

If you are tracking conversions using Legacy Conversion Tracking or addConversion, the data contained in the first-party cookie will be used to attribute the conversion to a specific contact and delivery.

For more information on using Legacy Conversion Tracking, see Legacy Conversion Tracking.

Tip: See the API documentation for addConversion for more information on tracking conversions using addConversion and the tid parameter.

To ensure that a first-party cookie gets created:

1. Go to Home > Settings > Data Exchange.
2. Scroll down to the Click Through Link Tracking section.
3. Make sure the Track which contacts follow links off of your messages checkbox is checked.
   A tracking cookie will only get created if Click Through Link Tracking is enabled.
4. Scroll down to the Tracking URL Parameters section.
5. Click the Add tracking URL parameters used to create and use first-party cookies checkbox.
   This will append the tracking parameters to URLs added to emails you send via the application. These tracking parameters are used to create a first-party cookie.
6. Add the JavaScript tracking snippet (included below) to the top of any page (after the opening BODY tag) that you might link to in emails you send from the application. This JavaScript will create a first-party cookie using the tracking parameters appended to URLs added to emails you send via the application.

Add JavaScript (TOP of the page after the opening BODY tag)

```javascript
<script type="text/javascript">
</script>

var bta = new __bta('ENTER APP BTA KEY HERE
');
bta.setHost("ENTER SETHOST KEY HERE
");
```
Add The Web Integration Manager Code To Your Site

The Web Integration Manager code allows Recommendations Web to collect and exchange data with your site. This code is used to capture contact browsing activity including the products being viewed. If you use Recommendations Web, you need to add this to every page of your website.

Note: If you currently use the Browse JavaScript on your site, remove it once the Web Integration Manager Code is on your site. Both capture your site’s browsing events but the Browse JavaScript does not work with Recommendations Web.

To use the code:

1. Go to Home > Settings > Web Integration Manager.
2. Copy all of the code in the black box. Do not edit the code.
3. Paste the copied code into the code for your site.

The code should be added to each page on your site. We also recommend embedding the code in the site's footer code so that the embed code runs after everything else on the page.

You also need to configure selectors on your page to get the Product ID (for product pages) and Email Address and/or Contact EID. See Capture Browse Data on page 1463 for more information.

Note: If you already use Browse Recovery or Recommendations Premium, your selectors should be configured already and you can skip this.

Oracle Bronto Affiliates and Subcontractors That May Process Personal Data

The following third-party subprocessors may process Personal Data. Additional subprocessors may be used to deliver services on a project by project basis. To request this information to be included in your applicable order for services, please contact your Oracle NetSuite sales representative.

<table>
<thead>
<tr>
<th>Subprocessor Name</th>
<th>Incorporation Location</th>
<th>Service Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>250ok LLC</td>
<td>United States</td>
<td>250ok provides email analytics and deliverability tools.</td>
</tr>
<tr>
<td>Akamai Technologies, Inc</td>
<td>United States</td>
<td>Akamai provides a global content delivery network and DDOS services.</td>
</tr>
<tr>
<td>Amazon Web Services LLC</td>
<td>United States</td>
<td>AWS provides hosting services.</td>
</tr>
<tr>
<td>LivePerson</td>
<td>United States</td>
<td>Liveperson provides chat services.</td>
</tr>
<tr>
<td>Tierpoint</td>
<td>United States</td>
<td>Tierpoint provides data center co-location hosting, managed backup services, and internet bandwidth.</td>
</tr>
<tr>
<td>Triblio</td>
<td>United States</td>
<td>Triblio provides web personalization and account-based marketing services.</td>
</tr>
<tr>
<td>Twilio Inc.</td>
<td>United States</td>
<td>Twilio’s service is utilized to deliver SMS alerts and notifications.</td>
</tr>
</tbody>
</table>
Oracle Affiliates that may process Personal Data can be found here: https://www.oracle.com/corporate/oracle-affiliates.html

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alertSize and getScrollXY scripts are provided for free by [http://www.howtocreate.co.uk](http://www.howtocreate.co.uk). Customers are not charged for use of this script.

**Multi-Brand Platform**

Bronto's Multi-Brand account allows you to separate internal business lines or departments while still using a common product.

A Multi-Brand account is comprised of a parent account and sub-accounts. You will use the parent account to create and manage sub-accounts.

When a sub-account logs in to one of you sub-accounts, they will be able to see and share content with other sub-accounts, however, from their perspective, sub-accounts are called peer accounts.

All of the topics relating to Multi-Brand discuss how to work within the Multi-Brand account view. At the sub-account level, Bronto appears and functions the same as any other Bronto account.
Multi-Brand Overview Page

The Overview page in a Multi-Brand account is the starting point for managing both your users and your sub-accounts.

Below you will find an explanation of each section and table found on the Overview page. To get to the Overview page, go to Home > Overview.

View Sub-Account's Total Email Volume

You can view a sub-account's total email volume in the Email Volume Overview area.

The Email Volume Overview section displays the total emails sent versus the total number of emails you have allocated.

View Sub-Accounts' Total SMS Volume

You can view a sub-account's total SMS volume in the SMS Volume Overview area.

The SMS Volume Overview section displays the total SMS messages sent versus the total number of SMS messages you have allocated.

View Bronto Announcements

You can view Bronto announcements in the Announcements From Bronto area.
The **Announcements From Bronto** section contains the most recent announcements sent from Bronto. These announcements contain relevant application information, such as application status updates, webcast announcements, and news about new features. Only a preview of each announcement is displayed. To see the full announcement, click **Read**.

![Announcements From Bronto](image)

**View Sub-Account Announcements**

You can view the announcements for your sub-accounts in the **Announcements For Sub-Accounts** area.

The **Announcements For Sub-Accounts** section contains all the announcements that you are currently displaying to your sub-accounts. These can include custom announcements you have created for your sub-accounts, or announcements from Bronto that you wish to pass on to your sub-accounts.

![Announcements For Sub-Accounts](image)

For information about how to create announcements for your sub-accounts see **Add Sub-Account Announcements** on page 1360.

**View Sub-Account Alerts**

You can view alerts for your sub-accounts in the **Sub-Account Alert** area.

The **Sub-Account Alert** section lets you quickly identify sub-accounts with low sender ratings, or sub-accounts who are reaching the limit of their email allocation. For the sender rating, your sub-accounts who have a sender rating of 5 or less will be displayed in red, and your sub-accounts with a rating of 7 or less will be displayed in orange. For email volume, your sub-accounts who have exceeded 100% of their email volume (also known as email allocation) will be displayed in red. Your sub-accounts whose email volume is at 90-100% of their total will be displayed in yellow.
Manage

View Sub-Account's Email Volume Over Time

You can view your sub-accounts' email volume over time in the Email Volume Over Time graph.

The Email Volume Over Time graph displays the email volume of your sub-accounts.

Add Sub-Account Announcements

You can create announcements for your sub-accounts.

To add an announcement for your sub-accounts:

1. Click Create New in the Announcements For Sub-Accounts section.
2. In the Release Date text box, select the date you want to post the announcement to your sub-accounts.
3. In the Release Time text box, select the time you want to post the announcement to your sub-accounts.
4. In the Expiration Date text box, select the date you want the announcement to expire.
5. In the Expiration Time text box, select the time you want the announcement to expire.
6. Select a type for the alert using the Message Type pull-down menu. You can select:
   - Normal - Appears in the Announcement And News dashboard widget in sub-accounts.
Manage

• Alert - Appears as an in-application alert in sub-accounts.

7. Add a headline for the announcement in the **Headline** text box.
8. Add a body for the announcement in the **Body** text box.
9. Click **Save**.

**Multi-Brand Settings**

The Multi-Brand **Settings** page is where you can manage the settings for your sub-accounts.

This includes managing your contact information, the site name, the sub-account's look and feel, usage alerts, connections, and API access tokens.

**View And Edit Your Contact Info Shown To Sub-Accounts**

The **Contact Info** page lets you view and edit the contact information for your account.

The information you provide on this page is displayed for your sub-accounts in the support area of their account.
To edit your contact info:

1. Go to Home > Settings > Contact Info.
2. Click Edit Contact Info.
3. Add a name, support email address, and support number.
   Remember, the information you provide on this page is displayed to your sub-accounts in the support area of their accounts.
4. Click Save.

Assign A Site Name For Sub-Account's Sign In Page
The Sign In page lets you specify the site name and where your sub-accounts will sign in to their accounts.

**Warning:** If you change the site name, all links in prior messages sent will no longer work and images will not render. Additionally, sub-accounts will no longer be able to reach the application through the URL that used the original site name.

To edit the site name:

1. Go to Home > Settings > Sign In.
2. Click Edit Site Name
3. Enter the new site name in the Sub-domain text box.
   **Warning:** Changing the site name affects the URL your sub-accounts used to log in, so exercise caution when changing the site name.
4. Click Save.

Create A Custom Sign In Page
If you wish to co-brand or privately brand the sign in page, you can build your own sign in page.

You can use the code example below to get started creating your custom sign in page.
You need to be familiar with HTML forms in order to properly implement a custom sign in page.

**Share Templates With Sub-Accounts**

The Template Sharing page gives you the ability to create templates and share them with all your sub-accounts.

You must upload your templates to a Master Account in order for them to be available for sharing. You can also share templates one sub-account at a time by clicking **Sub-Accounts->Sub-Account List->(the name of a specific sub-account)->Share Templates->Edit Template Settings.**

To manage template sharing:

1. Go to **Home > Settings > Template Sharing.**
2. Click **Edit Template Sharing Settings.**
3. Click the **Show template folder hierarchy to sub-accounts** checkbox to show the template folder hierarchy used to organize your templates.
   
   If you don't click this, the templates will be shown as a flat list with no hierarchy or folder structure.
4. Click the checkbox next to the templates you want to share with your sub-accounts.
   
   Optionally, you can click **Select All** to select all templates, or **Deselect All** to deselect all templates.
5. Click **Save.**
Set Up Sub-Accounts' Usage Alerts

You can use the Usage Alerts page to configure usage alerts in order to help you monitor your sub-accounts' allocation usage.

By default, email volume alerts are automatically sent to the email address associated with your account when your sub-accounts' allocation usage hits or exceeds 85%, 90%, 95%, and 99%. On the Usage Alerts page you can specify other usage percentages you want to receive alerts at. When the set thresholds are met an email is sent to the address associated with your account, or you can specify other email addresses that you want alerts sent to.

To edit usage alerts:

1. Go to Home > Settings > Usage Alerts.
2. Click Edit Usage Alerts.
3. Optional: Enter an email address in the Usage Alert Email Address text box.
   
   You can enter multiple email addresses by separating them with a comma. Alerts will still be sent to the email address for the account.

4. Set the threshold percentages that will trigger the usage alert email.
5. Click Save.

Add Contacts Or Domains To Suppression Lists

The suppression list in your account consists of email addresses or domains that can not be added to your sub-accounts and cannot receive marketing emails from your sub-accounts.

There are various reasons why you might need to exclude certain email addresses or domains from being added to your sub-accounts, with the most common being to honor the request of people who have opted-out of receiving marketing emails from your sub-accounts.

The most easily realized benefit of using the suppression list is improved sender and delivery ratings for your sub-accounts. For example, lets say you have a suppression list that consists of email addresses that have continually bounced and email addresses that have opted-out from receiving marketing emails from your sub-accounts. Because these email addresses are on the suppression list, they can no longer receive marketing emails from your sub-accounts. Because they are no longer receiving your sub-account's marketing emails, there will be a decrease in bounced messages and complaints generated by angry people who do not want to receive marketing emails from your sub-accounts. A decrease in bounces and complaints means an increase in both sender and delivery ratings for your sub-accounts! Additionally, having these email addresses on the suppression list ensures that they will not receive
marketing emails from your sub-accounts, even if they are accidentally added to one of your sub-account's accounts via a contact add or a list import.

To add an email address to the suppression list:

1. Go to Tables > Contacts > Suppression List.
2. Click the Add Email Addresses.
3. Type the email address(es) you want to suppress in the text box.
   If you are adding multiple email addresses, separate the email addresses using commas.
4. Click Add.

To add a domain to the suppression list:

5. Go to Tables > Contacts > Suppression List.
6. Click the Add Email Addresses.
7. Type the domain(s) you want to suppress in the text box.
   If you are adding multiple domains, separate the domain names using commas.
8. Click Add.

Delete Email Address Or Domain From Suppression List
You can manually remove an email address or domain from the suppression list.

Note: When you remove an email address or domain from the suppression list, all of the restrictions put in place by the suppression list are removed. This means that your sub-accounts can send marketing emails to that email address or domain, and those contacts can be added to your sub-accounts. In the case of an email address, make sure your sub-accounts once again get the approval of the contact to send marketing emails to them. This can be done via a subscription confirmation webform.

To delete an email address or domain from the Suppression List:

1. Go to Tables > Contacts > Suppression List.
2. Click the checkbox next to the email address(es) or domain(s) you want to delete.
3. Click Delete.
4. Click Delete on the confirmation page to finalize the deletion of the email address(es).

Enable A Sub-Account's Connections
You can enable connections between your sub-account and other platforms.

We have partnered with several web-analytics, e-commerce, and CRM platforms to enhance the marketing power of the application. You can enable these connections for your sub-accounts and increase the power of their marketing campaigns.

These are the connections displayed to your sub-accounts under Home -> Connections Center.

Google Analytics: Unavailable
Omniture: Available
Custom Analytics: Unavailable
SalesForce: Available
Baynote: Unavailable
TicketReturn: Unavailable
MyBuys: Available
Stone Edge: Unavailable
Pontiflex: Available
To enable a connection for you sub-accounts:

1. Go to Home > Settings.
2. Click Connections.
3. Click Edit Available Connections.
4. Click the checkbox next to the connection you want to enable.

For more information on each of the available connections, view the following help topics:

- Google Analytics Connection on page 1296
- Omniture Connection on page 1299
- Custom Web Analytics Connection on page 1294
- Salesforce Connection on page 1308
- Baynote Connection on page 1292
- TicketReturn Connection on page 1311
- MyBuys (Magnetic) Connection on page 1298
- Stone Edge Connection on page 1309
- Pontiflex Connection on page 1314
5. Click Save.

**Baynote Connection**

Baynote provides product recommendations based off of general customer behavior in relation to other products.

If you are a Baynote Recommendations user, then you will be able integrate recommendations directly into your emails with point and click simplicity. This will open up cross-sell and up-sell opportunities within your existing email marketing communications by leveraging your Baynote Recommendation catalogs. Don't just recommend products on your site, drive increased ROI in your emails too. We have provided an intuitive point and click tool to create and manage recommended items within marketing, as well as automated, email marketing messages sent through the application.

After you have setup the Baynote connection on the Baynote Connections page (located at Home > Connections Center), you will see a new button in the WYSIWYG editor for adding a Baynote Recommendation. Clicking this button will reveal a point-and-click tool for creating Baynote Recommendation images within your email.

The images generated by this tool will include several different elements. Generally, these elements will be an image of the product being recommended, a price for that product, and a description of that product. All of those pieces will be shown within your email as one image - due to the restrictions of emails they must be rendered as an image.

The exact data that is shown within the recommendation is determined by the attributes that you specify when configuring the connection. This is limited only by the data that is maintained within your Baynote account. Take some time to determine what is the best fit for your marketing efforts.
Product urls are used to control which recommendations appear in your emails. You can also choose to show multiple recommendations for any product, not just the top recommendation.

Using different Baynote Recommendation Guides allows you to control the type of recommendation being displayed, (e.g. complimentary vs. competitive recommendations). In a marketing email, you may want to show competitive product recommendations to highlight the diversity of your offerings, whereas in a receipt email, you may want show complimentary products to incentivize an up-sell.

The images that are shown to your contacts are generated in real-time. This means that they may see different recommendations as visitor behavior on your site changes. All information used to generate these images is managed by Baynote Recommendations.

The last item to note is that all images generated by this connection tool will automatically link to the recommended item. This link goes to Baynote, which redirects the contact to the appropriately recommended item based on the same parameters as the image. All of this is created for you automatically when you use the image build tool within the WYSIWYG editor.
Custom Web Analytics Connection
The Custom Web Analytics Connection provides you with insight into the effects of traffic that was driven to your site via email marketing, as well as how effective that traffic was at reaching your marketing goals.

Data can be sliced and diced at deeper levels, including link information and even custom field information for your contacts. This connection opens the door to post-click marketing analysis for increased ROI. While the application does have connections in place for several specific web analytics tools, this connection allows you to provide custom url parameters on your urls. This allows for a one-way connection with almost any web analytics platform.

Once enabled, we will append several tracking parameters onto all URLs within the emails you send out. These parameters provide information about your marketing efforts with every click, thus allowing your web analytics tool to track and deliver analytics information to you.

**Warning:** If the URLs in your messages contain parameters that are the same as the parameters being added by the Custom Analytics connection, we will replace the existing parameters with the Custom Analytics parameters. This could potentially break the existing functionality of the link, so please be mindful of the parameters being added via the Custom Analytics connection and the parameters that already exist in your URLs.

The parameters are added to the end of the URL after we log the click, just as we are redirecting the contact on to their final destination. The difference in the URLs is illustrated below:

Non-tracked URL:

http://yoursite.com/landingpage.html

Tracked URL:

http://yoursite.com/landingpage.html?channel=email&...

Within your web analytics tool, you will now be able to track the actions of the contacts that click through from messages you send. From this data, you can better understand how email marketing is impacting website activity and online sales. You will also be able to more easily identify goals reached by visitors who originated from your messages. You can further analyze these results based off of more detailed information from your messages, such as which link they clicked or which subject they received (in the case of an A/B split).

Google Analytics Connection
Google Analytics is a free digital analytics tool that you can use to better understand how customers interact with your site and make purchase decisions. Once you connect Google Analytics with Bronto, Bronto will pass embedded UTM
parameters to Google Analytics when your customers click a link within an email. Google Analytics data can help you better understand how to effectively appeal to customers on your Bronto lists and segments.

Note: This Bronto connection requires Google Analytics to be configured and running on your website.

Data is sent to Google Analytics when a customer clicks a link within an email. Using Google Analytics' reporting tools, you can create reports to better understand the behavior of customers who came to your site by clicking an email link. Within Google Analytics, site visitor data can be sliced and diced at deeper levels and can be used to fine-tune your marketing efforts. For more information about Google Analytics, visit https://www.google.com/analytics/.

When you enable the Google Analytics connection, UTM tracking parameters are added to links within your emails. UTM parameters provide information about your marketing efforts with every click, which allows Google Analytics to track and deliver analytics information to you. If you have set Google Analytics to only track specific domains, the parameters will only be added for links that include those domains.

Parameters are added to the end of a URL after Bronto logs the click and redirects your contact to their destination. You will not be able to see Google Analytics parameters when previewing a message. The difference in the a link with and without tracking parameters is illustrated below:

Non-tracked URL:

http://yoursite.com/landingpage.html

Tracked URL:

http://site.com/index.cgi?utm_source=bronto&utm_medium=email&utm_term=somelinktitle&utm_content=joe%40example.com&utm_campaign=message_group_name

Warning: If the URLs in your messages contain parameters that are the same as the parameters being added by the Google Analytics integration, we will NOT replace the existing parameters with the Google Analytics parameters. This could potentially break the existing functionality of the links, so please be mindful of the parameters being added via the Google Analytics integration and the parameters that already exist in your URLs.

Bronto will include the utm_source, utm_medium, utm_term, utm_content, and utm_campaign parameters by default. You can verify that Google Analytics integration is working by creating an external link in a message, doing a test send of the message, and then clicking a link in the message using your email client.

Bronto automatically sets three UTM parameters. These cannot be overriden:

- **utm_source** - Set to bronto unless you have a Multi-Brand account. If you have a Multi-Brand account, your utm_source value will be bm23. Google Analytics uses utm_source to identify the referring source of web traffic.
- **utm_medium** - Set to email. Google Analytics uses utm_medium to identify a marketing or advertising medium (banner, email, web, etc.).
- **utm_term** - Bronto sets the utm_term to the link that was clicked within the message. The utm_term is either the title or URL associated with the link the contact clicked in the message to access your site. If an image is a link, the image alt text might also be used. Google Analytics uses utm_term to identify paid search keywords used to access your site.

Two parameters can be configured within Bronto:

- **utm_content** - Google Analytics uses utm_content to differentiate between links within an email. Use the Choose the value for utm_content list to pick what data gets passed from Bronto to Google Analytics to populate utm_content. By default this is set to the Message Subject, which can be useful for identifying performance of A/B splits.
- **utm_campaign** - Google Analytics uses utm_campaign to differentiate between promotions and other marketing campaigns. Use the Choose the value for utm_campaign list to set what data gets passed from Bronto to Google Analytics to populate utm_campaign. You can use this parameter to identify a specific variable related to the campaign, such as Send Date or Message Name. By default, this value is set to the Message Name.
By default, any domains linked to via your emails are tracked. To restrict tracking to only specific domains, you can enter the exact URL for those domains in the **Only include Google Analytics tracking for the following domains** text box.

**What You’ll See In Google Analytics**

The traffic that you drive to your website via email is represented within the Google Analytics page for your website. When you look at your Traffic Sources within Google Analytics, you will see email as a traffic source.

<table>
<thead>
<tr>
<th>Medium</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>email</td>
<td>bronto</td>
</tr>
</tbody>
</table>

Using this data, you can track contact behavior after clicking a link in an email. This will help you better understand how email marketing impacts your site activity and online sales, identify if marketing goals are reached by visitors who originated from your emails, and further analyze results based off of more detailed information from your messages (such as which links contacts clicked or which subject they received in the case of an A/B split).

**Note:** You may see different conversion numbers reported within Google Analytics and Bronto depending on how you have set up your Google Analytics goals. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper.

**MyBuys (Magnetic) Connection**

MyBuys (Magnetic) allows you to embed MyBuys (Magnetic) recommendations in your transactional emails, such as order confirmations, shipping notifications, and marketing emails like periodic newsletters.

When a contact opens a message containing MyBuys (Magnetic) recommendations, MyBuys (Magnetic) will serve product recommendations as images. These products are recommended based on a contact's profile in MyBuys (Magnetic), the type of message (e.g. newsletter, order confirmation, or shipping notification), and the content of the message (for example a product that is purchased or shipped). This is done by using HTML `<img>` tags, where the image source is downloaded from MyBuys (Magnetic) and the clicks are routed through MyBuys (Magnetic).

**Omniture Connection**

Omniture SiteCatalyst provides marketers with actionable, real-time intelligence about online strategies and marketing initiatives.

Through a data connection with Omniture, you will be able to remarket to contacts based on website interactions, while also enriching your Omniture reporting. In Bronto you will gain access to Omniture segment data within both Message Reports and the segment tool. This provides you with the ability to identify contacts who have converted, viewed products, or abandoned products (depending on your Omniture segment selection). In Omniture, you will see crucial email marketing metrics offered alongside the existing reporting information. This gives you a beginning to end view of your email marketing efforts all in one place. Please note that this connection requires a subscription to Omniture SiteCatalyst, as well as their Genesis platform.

Once enabled, we will append several tracking parameters onto all links within the emails you send out. These parameters identify the delivery and contact with every click. This allows Omniture to track and deliver precise marketing information to you. It doesn't stop there. Every night, Bronto connects to Omniture and passes over information about recent deliveries, including all crucial details, such as sent, delivered, bounced, unsubscribes, open and clicks. In return, Omniture passes back detailed segment information that is collected on your website.

**Warning:** If the URLs in your messages contain parameters that are the same as the parameters being added by the Omniture connection, we will replace the existing parameters with the Omniture parameters. This could potentially break the existing functionality of the links, so please be mindful of the parameters being added via the Omniture connection and the parameters that already exist in your URLs.

**Warning:** Product names from Omniture containing greater than 250 characters will be truncated when they are passed to the application. For greater usability in the application, we suggest you limit product names in Omniture to less than 250 characters.

Access To The Web Analytics Tab
With this connection enabled, you will now gain access to the Web Analytics tab within Message Reports. This tab provides a listing of products associated with the Omniture segments you have selected for the connection. From here you can create lists within Bronto from this data.

**Message Report: The BrontoGear Winter Sale**

Additional Segment Criteria

You will find that Bronto's segments have an additional option of *Converted via Omniture*. This option allows you to identify people by the product and segment data passed over from Omniture.

**Tip:** For more information on using the Converted Via Omniture segment criterion, see Create A Segment Based On Contacts Who Converted Via An Omniture Segment on page 472.

Your Reporting Data In Omniture

Within Omniture, you will be able to track email marketing metrics within their powerful reporting tool. From this, you can better understand how email marketing is impacting website activity and online sales.

As you can see, you not only get raw email marketing metrics, but you can actually map revenue to individual email marketing efforts. Whether looking at the hard numbers or Omniture's graphical views, you will easily be able to prove the value of your email marketing efforts.
Salesforce Connection

Salesforce (salesforce.com) is a leading provider of on-demand customer relationship management (CRM) services.

Salesforce customers can leverage the application's Salesforce connection to import contacts, including custom fields, directly from your custom Salesforce.com reports. This process will save time and ensure data synchronization.

The Salesforce Connection works by allowing you to import contacts and data from a Salesforce report. Once you have the Salesforce Connection enabled and configured, you will see a new import option, **Import from a Salesforce report**. When performing a contact import in the application (go to **Contacts > Manage > Import**), you will be able to choose to import your contacts from a Salesforce report.

The application will use the salesforce username and login information you added on the Salesforce Connections page to access your Salesforce account. A pull-down menu will be populated with all of the reports available in your Salesforce account.

**Related Topics**

Import A Salesforce Report on page 1091

Stone Edge Connection

Stone Edge provides a leading order management system for independent retailers.

The Stone Edge connection makes it easy to send contact data updates from Stone Edge to the application. Using the data from Stone Edge, you can send more targeted emails to your contacts, thus increasing conversions and contact engagement.
The Stone Edge connection uses the standard Direct Import functionality to upload a list of contacts and their corresponding data into the application. If the contacts already exist in the application, then their field data is updated. If the contacts do not exist, then they are created with a status of "transactional". To setup the connection, you must enter the details contained in the Direct Import section on the Data Exchange page (Home > Settings > Data Exchange) into Stone Edge. Specifically, the URL, key, user_id, and site_id must be entered into Stone Edge.

**TicketReturn Connection**
TicketReturn provides a ticketing and box office system for clients that are mid-market sports and entertainment venues.

The TicketReturn connection makes it easy to send contact data updates from TicketReturn to the application. Using the data from TicketReturn, you can send more targeted emails to your contacts, thus increasing tickets sales, reducing no-shows, etc.

The TicketReturn system uses our API to send contact information to the application on a nightly basis. Any contact fields required by TicketReturn are automatically created and populated.

**Pontiflex Connection**
Pontiflex provides a leading signup advertising platform for ecommerce companies and nonprofit organizations.

The Pontiflex connection makes it easy to transfer contact data from Pontiflex to the application and to trigger real-time welcome messages to new subscribers. Using Pontiflex, you can run signup ads within mobile apps and websites, and accelerate the growth of your housefile with brand-specific, new-to-file confirmed opt-ins.

The Pontiflex connection uses the standard Direct Import functionality to upload a list of contacts and their corresponding data into the application. If the contacts already exist in the application, then they are "de-duplicated" and not added. All you need to do to setup the Pontiflex integration is provide data from your account to Pontiflex. They will need the following data:

- user_id
- site name
- list ID
- field names Optional

To trigger a welcome email to your new signups, you will need to supply Pontiflex with a message ID and the From email (delivery address the message should appear to come from).
Social Integration Settings
You can manage your Twitter and Facebook integrations.

The social integration settings allow you to connect your account with Twitter and Facebook.

Set Up Sub-Accounts’ Twitter Access
Setting up Twitter access for your sub-accounts allows them to post to Twitter and track the posts made via the application.

They can also trigger workflows based on whether a contact replies to, or retweets a Twitter username they have setup in their account.

To setup Twitter access for your sub-accounts:
1. Go to https://dev.twitter.com/apps.
2. Click Register a new app.
3. Fill in the pertinent information for your account. You need to make sure you setup the following options:
   • Application Type - Make sure the Browser radio button is selected.
   • Callback URL - The Callback URL needs to be http://app.example.com/mail/pref/social_integration/. Make sure you replace app.example.com with the domain you use to login to the application.
   • Default Access Type - The Default Access Type needs to be set to Read And Write.
4. Click Register Application.
5. Click I Accept.
6. Copy and remember the Consumer Key and the Consumer secret.
7. Login to the application.
8. Go to Home > Settings > Social Networks.
9. Add the Consumer Key you got from Twitter to the Twitter Consumer Key text box.
10. Add the Consumer secret to the Twitter Consumer Secret text box.
11. Click Save.

Your sub-accounts will now be able to access the Social Networks settings and configure the integration for their accounts.

Post To Facebook Using A Custom Facebook App
If you do not want to use the Bronto Facebook app, you will need to configure Bronto to post to Facebook with your custom application.

By default, your account is setup to post to Facebook using the Bronto Facebook app. If you want to post to Facebook using your own custom Facebook app, you'll need to first create the app and then add the credentials for the app to the Social Integration page.

Note: Providing assistance creating custom Facebook apps is outside the scope of services provided by our support team.

To setup access for a custom Facebook app:
1. Get the App ID and App Secret for your app from Facebook.
2. Go to Home > Settings > Social Networks.
3. Click Show Custom App Settings in the Posting To Facebook section.
4. Add the App ID in the Facebook App ID text box.
5. Add the App Secret in the Facebook App Secret text box.
6. Click Save.

Data Exchange
You can set up Bronto to exchange data outside entities.

Data Exchange allows you to configure methods of exchanging data with Bronto.
**Set Up Sub-Accounts' API Access Tokens**

The Data Exchange page on the Customize Agency Preferences page allows you to setup API Access Tokens for your sub-accounts.

API Access Tokens let you manage API access and permissions for your sub-accounts. The sub-account will not have access to these API Access Tokens, thus allowing you as an agency to have complete control over access to the API via this token.

To setup an API Access Token for a sub-account:

1. Go to **Home > Settings > Data Exchange**.
2. Click **Create New API Token**.
3. Give the API Token a name in the API Token Name text box.
4. In the Unique Identifier section, use the pull-down menu to choose the sub-account you are creating the API Token for. The actual Unique Identifier is also displayed.
5. In the Permissions and Settings section, click the checkboxes that correspond to the permissions you want to grant for this API Access Token. The options are:
   - Read - Allows data to be read from this account.
   - Write - Allows data to be written to this account.
   - Send - Allows emails to be scheduled and sent from the this account.
   - Token is active - Activates the token. You can always come back and either activate or deactivate the API token.
6. Click **Save**.

**Multi-Brand Sub-Accounts Menu**

The **Sub-Accounts** menu is where you can view and edit your sub-accounts and allocations.

**Sub-Accounts Overview Page**

The **Sub-Accounts Overview** page is the starting point for managing your sub-accounts and viewing metrics about their performance.

It is packed full of useful information that you can use to monitor the performance of your sub-accounts. To get to the **Sub-Accounts Overview** page, go to **Sub-Accounts > Sub-Account List**.

The **Sub-Account Overview** page is the starting point for managing your sub-accounts and viewing metrics about their performance. It is packed full of useful information that you can use to monitor the performance of your sub-accounts. To get to the **Sub-Accounts Overview** page, go to **Sub-Accounts > Sub-Account List**.

**Sub-Accounts Overview Table Columns**

This topic is a description of the columns in the Sub-account's Overview table.
Each of the columns that appears on the sub-accounts overview table is described below.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Login</td>
<td>The Last Login column indicates the date the sub-account was last logged into.</td>
<td>N/A</td>
</tr>
<tr>
<td>Last Delivery</td>
<td>The Last Delivery column indicates the date of the last delivery sent from the sub-account.</td>
<td>N/A</td>
</tr>
<tr>
<td>Period Start Date</td>
<td>The date that the allocation period for the sub-account started.</td>
<td>N/A</td>
</tr>
<tr>
<td>Period</td>
<td>The allocation period assigned to the sub-account.</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Last Period</td>
<td>The Total Last Period column indicates the number of emails sent from the sub-account during the last billing period.</td>
<td>The Total Last Period column numbers are dependent on the period start date for each sub-account. This needs to be taken into consideration if you add up the numbers in this column, and attempt to compare it to the to the total email volume for your account. Because the allocation period for each individual sub-account may differ from the allocation period for your account, these numbers may not align.</td>
</tr>
<tr>
<td>Total This Period</td>
<td>The Total This Period column indicates the number of emails sent from the sub-account during the current billing period.</td>
<td>N/A</td>
</tr>
<tr>
<td>Transactional</td>
<td>The Transactional column indicates the number of transactional emails sent from the sub-account during the current billing period.</td>
<td>N/A</td>
</tr>
<tr>
<td>API</td>
<td>Indicates if the sub-account has API access enabled.</td>
<td>N/A</td>
</tr>
<tr>
<td>Add-ons</td>
<td>Indicates the number of add-ons that have been used by the sub-account.</td>
<td></td>
</tr>
</tbody>
</table>
View Your Sub-Account's Allocation Usage

The Allocations page lets you view the allocations for your sub-accounts.

You can also edit your sub-account's email allocations by clicking **Sub-Accounts->Allocations**.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring Emails</td>
<td>Recurring emails are the emails regularly made available to the sub-account at the beginning of each allocation period.</td>
</tr>
<tr>
<td>Bump Emails</td>
<td>Bump emails are the extra emails allocated to the sub-account in excess of their regularly allotted email allocation (in other words, their recurring emails).</td>
</tr>
<tr>
<td>SMS Messages</td>
<td>The number of SMS messages regularly allocated to the sub-account at the beginning of their allocation period.</td>
</tr>
<tr>
<td>Bump SMS messages</td>
<td>Bump SMS messages are the extra SMS messages allocated to the sub-account in excess of their regularly allotted SMS message allocation.</td>
</tr>
<tr>
<td>SMS Keywords</td>
<td>The number of SMS keywords allocated to the sub-account at the beginning of their allocation period.</td>
</tr>
<tr>
<td>Contacts</td>
<td>The number of contacts regularly allocated to the sub-account at the beginning of their allocation period.</td>
</tr>
<tr>
<td>Users</td>
<td>The number of users regularly allocated to the sub-account at the beginning of their allocation period.</td>
</tr>
<tr>
<td>Hosting</td>
<td>The amount of Hosting space allocated to the sub-account.</td>
</tr>
<tr>
<td>Fields</td>
<td>The number of fields allocated to the sub-account.</td>
</tr>
<tr>
<td>API</td>
<td>Indicates if the sub-account has API access enabled.</td>
</tr>
</tbody>
</table>

Edit A Sub-Account's Message Allocations

The Edit Allocations page allows you to edit the email, and SMS allocations for all of your sub-accounts in one location.

To edit the allocation for a sub-account:

1. Go to **Sub-Accounts > Allocations**.
2. Click **Edit Allocations**.
3. Edit the number of allocations for the sub-account. You can edit the following:
   - Recurring Emails
• Bump Emails

  Note: Bump emails are emails that can be purchased in addition to the normal (aka recurring) number of emails allocated.

• SMS Messages
• Bump SMS Messages

4. Click Save.

**Find Out The Last Time A Sub-Account Used Account**
You can view the last time sub-accounts logged into their accounts.

The Usage Info section lets you see the Last Login date and the Last Message send date for the sub-account you are viewing.

**View How Many Emails A Sub-Account Sent**
The *Emails Sent* section lets you see how many emails a sub-account has sent for the current and previous allocation periods.

This section also includes how many transactional emails the sub-account has sent.

**View A Sub-Account's Average Email Metrics Over The Past 30 Days**
You can view your sub-accounts metrics related to the last 30 days of activity.

The *Average Email Metrics for the Past 30 Days* section lets you see the open rate, click rate, click through rate, conversion rate, and contact loss rate for the sub-account you are viewing. Each of these metrics is described below:
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Why It's Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Rate (email)</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate  The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Click Rate (email)</td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO)  The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Why It's Useful</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Click Through Rate (email)</strong></td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see <strong>Click Rate Metric</strong> on page 858.</td>
</tr>
<tr>
<td><strong>Conversion Rate (email)</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Contact Loss Rate (email)</strong></td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

**View Sub-Accounts' Sender Ratings**

You can view the sender rating for all of your sub-accounts.

To view the current sender ratings for all of your sub-accounts, go to Reporting > Sender Rating.
Tip: For more information on the sender rating, see Sender and Delivery Rating on page 309.

View A Sub-Account's Feature Access
The Feature Usage section lets you see all of the available features that are currently enabled for the sub-account you are viewing.

A checked box represents an enabled feature, whereas an unchecked box represents a feature that has not been enabled.

View Sub-Account's Email Volume
You can view your sub-accounts' email volume in graph form.

The Email Volume graph shows you how many emails the sub-account you are viewing has sent during a given time period.
Tip: You can sort the graph by day, week, month, or year using the Groups By radio buttons. You can also use the calendar icon to sort the graph by a date range of your choosing.

**View A Sub-Account's Number of Active Contacts**
You can view the number of active contacts for your sub-accounts in graph form.

The Active Contacts graph lets you see how many active contacts a sub-account had during a given time period.

For more information on the active contact status and all other contact statuses, see Contact Status on page 1083.

Tip: You can sort the graph by day, week, month, or year using the Groups By radio buttons. You can also use the calendar icon to sort the graph by a date range of your choosing.

**View A Sub-Account's Contact Loss Metrics**
The Contact Loss graph shows you the contact loss rate for a sub-account.

The contact loss rate is the percentage of contacts that have unsubscribed or been given a status of inactive (via the bounce policy).

When an email bounce occurs, the bounce will be placed within one of seven categories within the application. Six of the seven categories are assigned a 1 or a 0. This is where the email bounce limit for your account comes into play. By default, the email bounce limit is set to 5. If a contact accumulates 5 consecutive bounces with a 1 assigned to it, then the contact will be automatically given a status of inactive. A status of inactive means the contact is disabled and cannot receive messages from you. The lone application email bounce type that is not assigned a 1 or 0 is Bad Email Address. Contacts that bounce because of a Bad Email Address are immediately given a status of inactive.
Tip: You can sort the graph by day, week, month, or year using the Groups By radio buttons. You can also use the calendar icon to sort the graph by a date range of your choosing.

View A Sub-Account's Email Sender Rating History
The Historical Sender Rating graph lets you see the email sender rating history for the sub-account you are viewing. You can use this graph to chart the progress and relative success of a given sub-account's email marketing campaign.

Tip: You can sort the graph by day, week, month, or year using the Groups By radio buttons. You can also use the calendar icon to sort the graph by a date range of your choosing.

Tip: For more information on the email sender rating, see Sender and Delivery Rating on page 309.

Create A New Sub-Account
You can create new sub-accounts.

To create a new sub-account:

1. Click the Sub-Accounts tab.
2. Click Create New Sub-Account.
3. Fill in the contact information for the sub-account in the Contact Information section.
4. In the Master Account section, choose if you want this sub-account to be the master account.

   **Warning:** The Master Account is where shared templates are stored. It can also be used for internal marketing purposes and testing. Once selected, you cannot change the Master, nor can you delete a Master Account. Do not select this if this account is intended to be a sub-account.

5. Add a site name for the sub-account in the Site Name section.

   It is usually a good idea to make a sub-account's site name something similar to their organization's name because the site name is used when the sub-account enables message reply tracking.

6. Choose the modules you want to enable for the sub-account.

7. In the Emails section, you will set the number of emails allocated to the sub-account, and choose if they can exceed their email allocation.

   - **Number of Emails** - The number of emails allocated to the sub-account per allocation period.
   - **Can Exceed Email Allocation** - Clicking this checkbox allows the sub-account to exceed their email allocations.

8. In the SMS Allocations section, choose to enable SMS sending for the sub-account.

   If you choose to enable SMS for a sub-account, you will also need to specify the number of SMS messages allocated to the sub-account.
9. In the Allocation Period section, choose the allocation period for the emails and/or SMS messages allocated to the sub-account. Each option is described below:

- **Per** - The time period for which the number of messages you specified above will be allocated. You can choose 1, 3, 6, or 12 months.
- **Start On Date** - The date the allocations for the sub-account will begin.
- **Starting On Time** - The time the allocations for the sub-account will begin.

10. In the Usage Alerts section, you can choose to send usage alerts to a specific email address if the sub-account exceeds their allocation limits.

In order to use this feature, you need to setup usage alerts by going to **Home > Settings > Usage Alerts**.

11. In the Optional Admin User section, you can choose to add an optional admin user (a user with administrative privileges) in the sub-account.

The admin user in the sub-account will be able to create users and assign permissions for other users in the sub-account.

Create an optional admin user will create a user with administrative privileges in the sub-account. Administrative privileges allow a user to create new users in the sub-account and assign permissions to those users. This is not the same as adding a user in your account.

12. Click **Save**.

**Managing Your Sub-Accounts**

You can manage the settings for your sub-accounts in order to provide each account the appropriate access for their needs.

Managing your sub-accounts is extremely important and can help ensure that your sub-accounts are provided with the permissions and allocations to let them effectively conduct their email marketing campaigns. You can get to the Management page for a sub-account by going to **Sub-Accounts > Sub-Account List**. Click on the name of sub-account. Click on **Settings**.

**View Sub-Account's Contact Info Allocations**

In the **Contact Information** section, you can view and edit the contact information that was assigned to the sub-account when you created the sub-account.
To edit the contact information for the sub-account, click **Edit Information**

**Edit A Sub-Account's Contact Info**
You can edit the contact information for your sub-accounts.

From the Settings page for a sub-account, you can edit their contact information by clicking **Edit Information**.

**View A Sub-Account's Settings And Allocations**
The **Settings and Allocations** section on the **Settings** page allows you to view and edit any of the features/settings and allocations that you have set for the sub-account.

**Settings**
The Settings section on the Edit Sub-Account Settings And Allocations page allows you to edit the following settings:

- **Account Active** - Whether or not the account is active. Inactive accounts cannot send mail.
  
  **Note:** Users will not be able to login (from the UI or the API) to accounts with a status of inactive. However, account performance metrics (clicks, conversions, etc.) will still function normally.

- **Template Uploading** - Allows the sub-account to upload templates.
- **Default Templates** - Allows the sub-account to access the default templates we provide.
- **Bounce Limit** - Let's you specify the number of times contacts in the sub-account can consecutively soft bounce before they will be marked inactive.
Usage Alert Settings

The Usage Alert Settings section lets you choose to send usage alerts to a specific email address.

- **Send Usage Alerts** - This option will send usage alert emails when the sub-account reaches email volume thresholds you can specify by going to Home > Settings > Usage Alerts.
- **Usage Alert Email Address** - The email address that will receive the usage alerts.

Sub-Account Type

- **Marketing Platform** - Provides access to core email marketing features. Marketing Platform accounts receive 5 users, 100MB of hosting, 100 fields, and 1,000,000 contacts.
- **Marketing Platform with Workflow Automation** - Provides access to core email marketing features as well as an advanced feature set which includes: automated message rules, conversion tracking, direct update, Connections, A/B splits, Advanced Reports, and dynamic content. Marketing Platform with Workflow Automation accounts receive 5 users, 100MB of hosting, 100 fields, 1,000,000 contacts, 12 Inbox Previews, and API Access. Add-ons may also be purchased for Marketing Platform with Workflow Automation accounts, allowing you to further increase any of these allocations.

**Note:** API Access is enabled by default with the Marketing Platform with Workflow Automation.

Emails And Allocations

The Emails And Allocations section allows you to edit the allocations for a given sub-account.

- **Email Allocation** - The number of emails allocated to the sub-account.
- **Bump Email Allocation** - The number of bump emails allocated to the sub-account.
- **Enable Inbox Previews** - Allows you to enable inbox previews for the sub-account.

**Note:** By default, Marketing Platform with Workflow Automation accounts that were established before July 2015 receive 12 inbox previews.

- **Inbox Previews** - Allows you to specify the number of inbox previews allocated to the sub-account.
• *Set As Master Account* - Allows you to set this account as the master account
• *Allocation Period Length* - Allows you to specify the duration of the allocation period.
• *Starting On Date* - Allows you to specify the start date for the allocation period.
• *Starting At Time* - Allows you to specify the start time for the allocation period.

### Account Add-Ons

The Account Add-Ons section allows you to choose additional add-ons for the sub-account.

• *Enable API Access* - Allows you to enable API access for the sub-account.

### Set A Bounce Limit For Multi-Brand Account

The Bounce Limit section lets you pick the number of times contacts can consecutively bounce without recorded activity before they are automatically unsubscribed.

For a Multi-Brand account the bounce limit is set for each sub-account by editing its allocations. To do this, go to [Sub-Accounts > Sub-Account List](#), click the edit icon for a sub-account, and then click [Edit Allocations](#).

You can choose between 3 and 7 bounces. The default is 5.

Understanding what a bounce is and how we keep track of bounces can help you choose which bounce limit is right for you. For more information on bounces, see [Email Bounce](#) on page 196.

Not all types of bounces get counted towards the bounce limit. For more information on how bounces are classified and which bounces count toward the bounce limit, see [Email Bounces with Bronto](#) on page 197.

**Note:** Only users with administrative permissions can set the bounce limit for an account. For more information on granting a user administrative permissions, see [Grant A User Admin Permissions](#) on page 1342.

### Edit A Sub-Account’s Settings and Allocations

From the Settings page for a sub-account, you can view their settings and allocations by clicking [Edit Allocations](#).

To edit the allocations and settings for the sub-account, click [Edit Allocations](#). Each of the allocations and settings is described below:

• **Sub-Account Type** - The type of sub-account you are viewing.
• **Template Uploading** - Enables the sub-account to upload custom templates in the application.
• **Default Templates** - Allows the sub-account to access the default templates that we provide.
• **Email Volume Alerts** - Indicates if you set up email volume alerts for the sub-account. Email volume alerts can be setup by going to [Home > Settings > Usage Alerts](#).
• **Bounce Limit** - The Bounce Limit indicates the bounce limit for the sub-account. The bounce limit refers to number of times a contact can consecutively soft bounce before they will be marked inactive.
• **Master Account** - Indicates if the account is a master account.
• **Recurring Emails** - Indicates how many recurring emails the account is using.
• **Bump Emails** - Indicates how many bump emails the account is using. Bump emails are emails that can be purchased in addition to the normal (aka recurring) number of emails allocated.
• **Contacts** - Indicates how many contacts are currently in the account as compared to the total number of contacts allocated.
• **Hosting** - Indicates the total hosting space used by the account as compared to the total hosting space allocated.
• **Uses** - Indicates how many users have been created in the account as compared to the total number of users allocated.
• **API** - Indicates if the API is activated. If the API is activated, the number of API calls made by the sub-account for the day will also be displayed.
• **Data Fields** - Indicates how many fields have been created in the account as compared to the total number of fields allocated.

**View And Add To A Sub-Account's Shared Templates**

The **Shared Templates** page lets you pick and choose which templates a specific sub-account has access to.

To view the Shared Templates page for a sub-account, go to **Sub-Accounts > Sub-Account List**. Click on the name of a sub-account and click **Shared Templates**.

To share templates with your sub-accounts, you must first upload your templates to a Master Account. You can then globally share templates by going to **Home > Settings > Template Sharing**. To edit which templates you choose to share with your sub-accounts, click **Edit Template Settings**, and then click the checkbox next to the name of the template you wish to share.

**Delete A Sub-Account**

You can delete your sub-accounts.

To delete the sub-account:

1. Go to **Sub-Accounts > Sub-Account List**.
2. Click on the name of the sub-account.
3. Click **Settings**.
4. Click **Delete**.

**Sub-Accounts Email Deliveries And Related Metrics**

On the **Deliveries** page, you can view metrics describing the most recent deliveries made from a sub-account.

To view the Deliveries page for a sub-account, go to **Sub-Accounts > Sub-Account List**. Click on the name of the sub-account. Click **Deliveries**.

**View A Sub-Account's Email Deliveries**

You can use the **Deliveries** table to see the emails sent from the sub-account, along with metrics for each email message.

You can also view the actual message by clicking the message name. A description of what each column represents can be found below:
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Name: Subject</td>
<td>The Message Name: Subject column displays the name of the email message and the subject line. Note: When searching for an email delivery or sorting the Message Name: Subject column, you can only search and sort based on the email message name. You can not search or sort based on the subject. Note: If the message was used in a remail delivery, the word Remail will appear at the beginning of the subject line. Remails (also know as remarketing) allow you to send a follow-up email to contacts as a reminder or to persuade them to continue along the conversion process.</td>
<td>N/A</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Delivery Type</td>
<td>The delivery Type represents the type of send. Each type is described below:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• <em>Normal</em> - The <em>Normal</em> email delivery type represents a regular email delivery sent to more than one contact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Bulk</em> - The <em>Bulk</em> email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Skipped</em> - The <em>Skipped</em> email delivery type represents email messages that were skipped by Bronto and not sent.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Single Contact</em> - The <em>Single Contact</em> email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as <em>Single Contact</em>, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Test</em> - The <em>Test</em> email delivery type represents email deliveries that were sent as test deliveries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>AMR</em> - The <em>AMR</em> email delivery type represents email deliveries that were sent via an <em>Automated Message Rule</em>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Split Group</em> - The <em>Split Group</em> email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>FTAF</em> - The <em>Forwards to a Friend</em> email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Transactional</em> - The <em>Transactional</em> email delivery type represents email deliveries were sent as transactional emails.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

**Note:** Transactional deliveries are hidden by default. For information on how to show them, see View Transactional Email Deliveries on page 1014.
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
</table>
| **Status**  | The Status column indicates the state of the delivery or post. Each status is described below:  
  • *Skipped* - The *Skipped* status represents deliveries that have been canceled or were attempting to send emails in excess of your email allocation.  
  • *Partially Sent*  
  • *Canceled*  
  • *Successful* | N/A |
<p>| <strong>Recipients</strong> | The recipients column shows the lists and segments that the delivery was sent to. If the delivery was sent to more than one list and/or segment, you can move your mouse over the list or segment currently shown in the recipients column to reveal a tool-tip which contains the other lists and/or segments the delivery was sent to. For deliveries that were a part of an A/B split test, you can view the split size percentage in the column. You can also view the name of the split group if you hover over the text in the recipients column. | N/A |</p>
<table>
<thead>
<tr>
<th>Metric/Data</th>
<th>Description</th>
<th>Why It's Useful (Metrics Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Date</td>
<td>The send date column contains the actual date and time the delivery was sent or the post was made. If the delivery made use of send time optimization, you may see one or both of the following icons:</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• 🕒 - For each contact, the Optimize Time of Day option will schedule the delivery so that the email arrives in the contact's inbox at the time of day the contact is most likely to open emails from you. This delivery may appear in your outgoing deliveries for up to 24 hours</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 🍃 - For each contact, the Optimize Day of the Week option will schedule an email message to send on the day of the week the contact is most likely to open emails from you. On that day, the email will be sent at the contact's optimal time of day. This delivery may appear in your outgoing deliveries for up to a week</td>
<td></td>
</tr>
<tr>
<td>Sent</td>
<td>The emails sent metric represents the total number of emails that were sent.</td>
<td>The emails sent metric is important to know for two main reasons. First, you need to know the number of emails sent for the purpose of making sure you don't exceed the number of emails allocated for your account. Second, the emails sent metric is the starting point for evaluating how many of your emails actually got delivered.</td>
</tr>
<tr>
<td></td>
<td>Note: Deleted email deliveries will still be counted as part of the emails sent metric.</td>
<td></td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Open Rate</strong></td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO) The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td>Metric/Data</td>
<td>Description</td>
<td>Why It's Useful (Metrics Only)</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Email Revenue</strong></td>
<td>The <em>Email Revenue</em> metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.</td>
<td>The <em>Email Revenue</em> metric is important because it allows you to see the revenue that directly ties to your email marketing efforts.</td>
</tr>
<tr>
<td><strong>Revenue Per Email</strong></td>
<td>The <em>Revenue Per Email</em> metric represents the average revenue tracked for an email successfully delivered from your account.</td>
<td>The <em>Revenue Per Email</em> metric is important because it allows you to see how much revenue, on average, a successfully delivered email earns.</td>
</tr>
<tr>
<td><strong>Contact Loss Rate (email)</strong></td>
<td>The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.</td>
<td>The contact loss rate is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under the contact loss rate, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or you're sending the wrong message to the wrong group of contacts.</td>
</tr>
</tbody>
</table>

**View A Sub-Account's Delivery Metrics**

You can view your sub-accounts' delivery metrics in graph format.

The Delivery Metrics graph allows you to view a sub-account's 's delivery metrics for a given time period.
The Usage Info section lets you see the Last Login date and the Last Message send date for the sub-account you are viewing.

Tip: You can hover over any point on the line graph, or any bar on the bar graph to view more detailed data.

Multi-Brand Sub-Account Reporting

The Reports menu is where you can view statistical information related to your sub-accounts and users.

View Sub-Accounts’ Open And Click Rates
You can view all of the open and click rates for your sub-accounts in graph format.

You can view the open and click rates for all of your sub-accounts by going to Reporting > Opens.

Tip: You can use the Reports Period menu to sort the graph by one of the following predefined date ranges:

- Last 7 days (week)
- Last 30 days (month)
- Last 60 days
- Last 90 days
- Last 365 days (year)

You also can use the calendar icons to sort the graph by a date range of your choosing.

Tip: For more information on the open and click rates and how they are calculated, see Open Rate Metric on page 882 and Click Rate Metric on page 858.
**View Sub-Accounts’ Conversion Rate**
You can view the conversion rate for all of your sub-accounts.

You can view the conversion rate for all of your sub-accounts by going to Reports > Conversions.

**Tip:** You can use the Reports Period menu to sort the graph by one of the following predefined date ranges:
- Last 7 days (week)
- Last 30 days (month)
- Last 60 days
- Last 90 days
- Last 365 days (year)

You also can use the calendar icons to sort the graph by a date range of your choosing.

The conversion rate represents the percentage of times a conversion was made, as compared to the number of clicks recorded.

\[
\text{Conversion Rate} = \left( \frac{\text{Conversions}}{\text{Clicks}} \right) \times 100
\]

**View Sub-Accounts’ Sender Ratings**
You can view the sender rating for all of your sub-accounts.

To view the current sender ratings for all of your sub-accounts, go to Reporting > Sender Rating.

**Tip:** For more information on the sender rating, see Sender and Delivery Rating on page 309.

**View Sub-Account’s Email Volume For The Current Allocation Period**
You can view the email volume for the current period for all of your sub-accounts.

You can view the email volume for all of your sub-accounts for the current allocation period by going to Reporting > Email Volume.
View Sub-Account's SMS Volume For The Current Allocation Period
You can view the SMS volume for the current period for all of your sub-accounts.

You can view the SMS volume for all of your sub-accounts for the current allocation period by going to Reporting > SMS Volume.

View A Sub-Account's Hosting Usage For The Current Allocation Period
You can view the hosting usage for the current period for all of your sub-accounts.

You can view the hosting usage for all of your sub-accounts for the current allocation period by going to Reporting > Hosting Usage.
Manage Tip: For more information on how your sub-accounts can use the hosting provided in the application, see Upload Files To Bronto on page 1161.

Manage Contacts

Manage contacts allows you to import, export, and clean contact lists, as well as generate contact reports.

While contacts are essential to a successful email marketing campaign, don't fall into the trap of thinking more is better. Equally important to having contacts, is how you manage those contacts. Adding new contacts, removing old or inactive contacts, and learning more about your contacts by generating reports is essential to ensuring that your messages are being sent to people who will get the most from your emails, and in turn, help your business to grow.

Edit A Contact’s Info

To Edit a Contact:

1. Go to Tables > Contacts > Search Contacts.
2. Search for your contacts. For more information about how to do this, see Search For Contacts In Your Account on page 896.
3. Click on the email address of the contact you wish to edit.
4. Click Edit.
5. Optional: In the General section, you can edit a contact's:
   - Email Address
   - Message Preference (Email)
   - Twitter account
   - Dynamic Preview
   - Contact Source
   - Mobile Number
6. Optional: To edit a field, depending on the type of field you are viewing, either click the radio button, click the checkbox, or add text in the text box to add data to that field for contact you are viewing. The Fields section lists all of the fields in your account. If the field is blank, not selected, or not checked, the contact you are viewing does not have data stored in that field. For information on fields, see Contact Fields on page 558.
7. Optional: To add the contact to a list, click the checkbox next to the name of the list you want to add them to. The Lists section contains all of the lists that have been created in your account. The lists that are checked represent the lists that the contact you are viewing belongs to. You can use the Select All and Deselect All links to quickly add or remove the contact from all lists.
   - If you want to remove a contact from a list, un-check the checkbox next to the name of the list you want to remove them from.
   - For information on lists, see Lists on page 533.
8. Click Save.

Clean Contacts

Cleaning contacts allows you to maintain high deliverability rates by choosing to either delete, add to a new list, or add to an existing list any contacts that have bounced a certain number of times, are not associated with any lists in your account (aka Orphaned contacts), or who have not opened or clicked a specific number of email messages you have sent them.

Separating active and inactive contacts allows you to target and format your email messages based on a contact's activity. For example, you could send a plain text email message that re-introduces your offerings to any contact that has not opened or clicked the last 10 email messages you have sent them.
There are two types of contacts that you will frequently clean:

- **Orphan Contacts**: are contacts that are not on any lists. (i.e. they are in your account, but they are not associated with any of your lists).
- **Non-engaged Contacts**: are contacts have not opened or clicked any of your messages (i.e. no activity since they were added).

There could be a number of reasons why contacts have not engaged:

- Your contacts could be receiving your messages in plain text. The application does not track messages sent in plain text format.
- Your contacts may not be receiving your messages. HTML messages can sometimes be caught in spam filters or routed to junk folders.
- Your contacts may no longer be interested in receiving your communications.

**Related Topics**

- **Contact Status** on page 1083
  Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

- **Contact Fields** on page 558
  Contact fields are data containers that you can use to save information about your contacts.

- **Contact Imports** on page 1080
  The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

- **Search For Contacts In Your Account** on page 896

**Use The Clean Contacts Feature**

To use the clean contacts feature:

1. Go to **Tables > Contacts > Manage**.
2. Click **Clean**.
3. Select whether you want to clean contacts on all of your lists or a specific list using the **Choose A List** pull-down menu.
4. Select the type of contacts you want to clean in your account.
   You can select:
   - **Bounced Contacts** - allows you to clean contacts in your account who have recorded X number of soft bounces. Next to each radio button, you can see how many contacts fall under each bounce category (1 bounce, 2-3 bounces, 4 or more bounces).
     Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.
     **Tip:** For more information on the bounce classification system, see **Email Bounce** on page 196.
   - **Non-Engaged Contacts** - allows you to clean contacts in your account who have not opened or clicked the last X number of email messages you have sent them. Next to to each radio button, you can see the number of contacts who fall under each non-engaged category.
     **Warning:** The application cannot track plain text email messages. Because of this, contacts who receive plain text email messages will be categorized as non-engaged, even if they opened or clicked the email messages. We recommend that you add contacts to a new list or an existing list before actually deleting them to help make sure that none of your contacts receiving plain text email messages accidentally get deleted.
   - **Orphaned Contacts** - allows you to clean contacts in your account that are not on any lists.
5. Select what you want to do with the contacts.
• **Clean these contacts** - This option will immediately delete all the contacts who match the criteria selected above. Contacts cleaned in this way cannot be recovered.

• **Add these contacts to a new list** - This option will create a new list containing the contacts who match the criteria selected above. You can use this list to run a re-engagement campaign.

• **Add these contacts to an existing list** - This option will add the contacts who match the criteria selected above to an existing list.

6. Click **Next Step**.

7. If you selected:

   • **Clean these contacts** - Review the selections you have made and click **Finish** to complete the process.
   
   • **Add these contacts to a new list** - Add an internal and external name for the new list.
     
     The internal name that you assign to your list is only visible to users within your account.

     The external name is the name that will appear to your contacts if you make this list visible on a webform.

   • **Add these contacts to an existing list** - Select the list you want to add the contacts to using the **List** pull-down menu.

8. Only if you selected **Add these contacts to a new list** or **Add these contacts to an existing list**: Click **Next Step**.

9. Only if you selected **Add these contacts to a new list** or **Add these contacts to an existing list**: Review the selections you have made and click **Finish**.

**Related Topics**

[Email Bounce](#) on page 196

An email bounce is an automated message about a delivery failure.

**Manage Duplicate Contacts**

The best way to manage duplicate contacts is to avoid them by encouraging your customers to use a managed preferences webform to make updates to their accounts. But it is possible that contacts might submit more than one email address in a variety of ways and it is important to try to manage duplicate contact records quickly when this happens.

Bronto only requires the email address contact field to be unique. This means that it is possible to have more than one record for a contact if the contact submits information to you using different email addresses. For example, a contact may have used both a Yahoo account and a Google account to place orders. Or an engaged contact may have switched email providers and subscribed again using their new email address. Because fields like first name, last name, address, etc. do not need to be unique there is nothing to prevent both from being imported into Bronto as separate contact records even though it is the same person.

If you discover that you have a contact who has more than one email address stored in Bronto you can delete the record associated with the outdated email address. However, when the outdated email address is associated with a great deal of historical contact data you will not want to delete it. Instead you should:

1. Change the email address you want to use for the contact. The best way to do this is to prefix the word deleted to the email address.

2. Delete this record.

3. Update the outdated email address for the contact.

You must change the email address before using it to update a contact's email or Bronto won't be able to recognize the email address as unique when you try to make the update. This is true even if you delete the record before you try to use the email address again.

To simply delete a duplicate contact record and all of their data see [Delete Contacts On The Search Contacts Page](#). To update the email address for a contact in order to preserve the contact's historical data:

1. Go to **Tables > Contacts > Search Contacts**.

2. Search for the email address you want to maintain for the contact.

   The contact record should appear in the table. If it does not, make sure you searched using **Email**.
3. Make sure you have a copy of the email address saved somewhere else.
4. Click the pencil icon to edit the contact record.
5. In the Email Address box enter deleted. before the email address.

   For example the email address would look similar to deleted.dora@example.com. To save time, you can copy the new email address so you can search for it on the Search Contacts page.

   Make sure you are updating and deleting the correct contact record.

6. Click Save & Close.
7. Search for the contact record you just updated and delete it.

   Make sure you delete the correct version of the contact record.
8. Search for the email address you want to update.
9. Click the pencil icon to edit the contact record.
10. In the Email Address box enter the correct email address for the contact.

   This is the email address before deleted. was added to it.
11. Click Save Changes.

Direct Unsubscribe

Direct Unsubscribe allows you to unsubscribe contacts via pages on your website, or from emails you send them via the application.

Direct Unsubscribe uses an img tag added to a page on your site to handle unsubscriptions. When a contact navigates to a page on your site where you have added the Direct Unsubscribe img tag, they will be identified via a cookie. If a cookie is not set in the contact's browser, you will need to add the email address of the contact on to the URL used in the img tag. The Direct Unsubscribe URL is contained in the img tag obtained on the Data Exchange page. When a contact is unsubscribed, they will be given a status of Unsubscribed and will no longer receive marketing emails from your account.

Warning:

   If you are using a private domain and want to use Direct Unsubscribe on a page accessed using https, you must do the following:

   • Change the URL in the Direct Unsubscribe img tag src attribute to use https.
   • Change the domain in the Direct Unsubscribe img tag src attribute to app.bronto.com.

If you are programmatically adding the email address, it should be added to the URL as a parameter using the following format: &email=example@example.com.

http://public_domain/public/?
q=direct_unsubscribe&fn=Public_DirectUnsubscribeForm&id=IDSTRING&email=email@example.com

If you choose to programmatically add in the email address of the contact you wish to unsubscribe, the email address you add will take precedence over the cookie.

Some characters that are allowed in a URL are considered reserved characters. A reserved character is a character that can have a special meaning, for example a + symbol. It's a best practice to avoid using reserved characters within an email address (except for @) and you should try to limit your contacts' ability to use them. However, if they do have a reserved character in their email you can encode the character so that it can be used in your URL. For example + would need to be encoded as %2B.

The Direct Unsubscribe URL provided is unique to your account and allows the application to identify your account. The q, fn, and id parameters allow the application to process the data that is to follow, as well as identify your account. The last bit, &email=email@example.com is the actual string that contains the contact's email address.

You can also use the comment parameter to provide more information about your contact source in consent reports. For example, if the last part of your URL is &email=email@example.com&comment=UnsubscribedWeb, the source detail value for this contact in your consent report will be "UnsubscribedWeb".
Note: Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.

Set Up Direct Unsubscribe
You can enable direct unsubscribe in your account.

To setup Direct Unsubscribe:
1. Go to Home > Settings > Data Exchange.
2. Scroll down to the Direct Unsubscribe section and click the Enable Direct Unsub for unsubscribing contacts checkbox.
   You will be provided with an img tag.
3. Copy the img tag and add it to a page on your site that you want to use to handle unsubscriptions.

   Warning:
   If you are using a private domain and want to use Direct Unsubscribe on a page accessed using https, you must do the following:
   • Change the URL in the Direct Unsubscribe img tag src attribute to use https.
   • Change the domain in the Direct Unsubscribe img tag src attribute to app.bronto.com.

Suppression Lists
A suppression list is a list of email addresses or domains that cannot be added to, or contacted by, your account.

When an email address is added to the suppression list, you will not be able to:
• Send messages to this contact.
• Import this email address as part of a contact import.
• Manually add a contact with this email address to your account.

If the email address belongs to an existing contact, that contact will be deleted from your account. It may take up to 24 hours for the contact to be added to the suppression list and deleted from your account. To prevent the contact from receiving emails within this waiting period, manually unsubscribe them from your account after they are added to the suppression list.

When used properly, a suppression list can improve your sender and delivery ratings. For example, you can suppress both email addresses that continually bounce and email addresses that have opted-out from receiving marketing emails from you. Once these types of contacts are on the suppression list, they can no longer receive emails from you. This will decrease bounces and complaints for your account, which will lead to an increase in both your sender and delivery rating. See Sender and Delivery Rating on page 309 or Email Bounce on page 196 for more information on these topics.

A contact on the suppression list cannot be added to your account until the email address is removed from the suppression list. If a contact who is on the suppression list attempts to sign-up to receive email messages from you via an Add Contacts webform or via Direct Add, they will not be added as a contact in your account.

You can download a suppression list from the Export Contacts page. For more information see Export Contact Data on page 940.

Related Topics
Export Contact Data on page 940
Contact Fields on page 558
Contact fields are data containers that you can use to save information about your contacts.
Contact Imports on page 1080
The import feature allows you to upload a list of contacts that you can add, update, unsubscribe, or delete as part of the import process.

**Search For Contacts In Your Account** on page 896

**Clean Contacts** on page 1399

### Add An Email Address To The Suppression List

To add an email address to the Suppression List:

1. Go to **Tables > Contacts > Suppression List**.
2. Click the **Add Email Addresses**.
3. Type the email address(es) you want to suppress in the text box.
   - If you are adding multiple email addresses, separate the email addresses using commas.
4. Click **Add**.

### Add An Entire Domain To The Suppression List

To add a domain to the suppression list:

1. Go to **Tables > Contacts > Suppression List**.
2. Click the **Add Email Addresses**.
3. Type the domain(s) you want to suppress in the text box.
   - If you are adding multiple domains, separate the domain names using commas.
4. Click **Add**.

### Delete An Email Address Or Domain From The Suppression List

When you remove an email address or domain from the suppression list, all of the restrictions put in place by the suppression list are removed. This means that you can send emails to that email address or domain and they can be added to your account. In the case of an email address, make sure to once again get the approval of the contact to send emails to them via a subscription confirmation when you remove them from the Suppression List.

For information about Subscription Confirmation webforms, see **Webforms**.

To delete an email address or domain from the Suppression List:

1. Go to **Tables > Contacts > Suppression List**.
2. Click the checkbox next to the email address(es) or domain(s) you want to delete.
3. Click **Delete**.
4. Click **Delete** on the confirmation page to finalize the deletion of the email address(es).

### Reactivate Inactive Contacts

To reactivate an inactive contact:

1. Go to **Tables > Contacts > Search Contacts**.
2. Find the contact you want to reactivate using the search settings.
   - For more information about how to search for contacts, see **Search For Contacts In Your Account** on page 896.
3. Once you have located the contact you wish to reactivate, click on the email address associated with that contact.
4. On the Contact Overview page, click the **Activate** button. This will give the contact a status of active, however, you once again need to get permission to send marketing email to the contact. There is no way to reactivate a large number of contacts at once. This is largely due to the seriousness of an unsubscribe request and the legality of re-subscribing someone who has unsubscribed.

### Peers

Peers are other accounts that you can view metrics for and evaluate your email marketing performance against.

**Important:** If you do not have a Multi-Brand account, your account does not use peers.

You can also share templates and messages with other peer accounts.

The **Peers Overview** page lets you see all of your peers, as well as information about their account and their performance metrics. To view information about a particular peer account, click on their name in the Peers table.

#### What Do The Columns On The Peers Table Mean?

The Peers table provides detailed information about messages sent by your peers.

**Important:** If you do not have a Multi-Brand account, your account does not use peers.

Each of the columns on the Peers Table is described below.

**Note:** The numbers shown for the open rate, click through rate, click rate, conversion rate, and contact loss rate are in reference to the last delivery made from the peer account.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Delivery</strong></td>
<td>The Last Delivery column indicates the date of the last delivery sent from the sub-account.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Total Last Period</strong></td>
<td>The Total Last Period column indicates the number of emails sent from the sub-account during the last billing period.</td>
<td>The Total Last Period column numbers are dependent on the period start date for each sub-account. This needs to be taken into consideration if you add up the numbers in this column, and attempt to compare it to the to the total email volume for your account. Because the allocation period for each individual sub-account may differ from the allocation period for your account, these numbers may not align.</td>
</tr>
<tr>
<td><strong>Total This Period</strong></td>
<td>The Total This Period column indicates the number of emails sent from the sub-account during the current billing period.</td>
<td>N/A</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Additional Information</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Open Rate</td>
<td>The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: <em>Render Rate</em> The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.</td>
<td>The open rate is important because it represents the first level of contact engagement. The open rate lets you see out of all the contacts who received the email you sent, who actually took the time to open it. You can use the open rate to gauge the effectiveness of your from name, from address, and subject line.</td>
</tr>
<tr>
<td>Click Through Rate</td>
<td>The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.</td>
<td>The click through rate gives you an overall indication of contacts who, first received your message, and second, were engaged enough to open it and click on a link.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>Tip:</em> The click through rate metric is a legacy calculation. For a more useful calculation, we suggest you view the click rate. The click rate is determined by the number of unique clicks over the number of opens. For more information on the click rate, see Click Rate Metric on page 858.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Additional Information</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Click Rate</strong></td>
<td>The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: <em>Click to Open Rate (CTO)</em> The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the start of the report are included in the calculation. For example, a contact may have opened a message on a previous day, but clicked on the message on a day within the report range.</td>
<td>The click rate is important because it represents the second level of contact engagement. The click rate gives you an indication of how effective the email you sent was at getting contacts to click the links contained therein. The click rate can also give you an idea of how effective the placement and design of your calls to action are.</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.</td>
<td>The conversion rate metric is important because it indicates how effective the email you sent was at getting your contacts to perform an action. Whether it's making a purchase or downloading a white paper, the goal of email marketing is to compel your contacts to perform an action.</td>
</tr>
<tr>
<td><strong>Contact Loss (email)</strong></td>
<td>The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see Contact Status on page 1083</td>
<td>The contact loss metric is important because it points out potential problems in the targeting of your deliveries, and/or the design and content of your message. If you notice a high number under contact loss, you should review both who you are sending to, and what you are sending them. There is a good chance you are either sending to a bad list or segment, or sending the wrong emails to the wrong group of contacts.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Additional Information</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------</td>
</tr>
<tr>
<td>Email Sender Rating</td>
<td>Your sender rating is driven by the level of contact engagement (opens, clicks, conversions) your sent emails that were received, complaints your emails receive from ISP Feedback Loop, and internal measurements that we use to help you optimize your deliverability.</td>
<td>Tip: For more information on the email sender rating, see Sender and Delivery Rating on page 309.</td>
</tr>
</tbody>
</table>

**View All The Messages In A Peer Account**

The Peers tab lets you view all of the messages that have been created in a peer account.

1. **Important:** If you do not have a Multi-Brand account, your account does not use peers.

By default, the most recently edited messages are shown first.

You can also use the folder links on the right side of the page to navigate through the message folder hierarchy in the account you are viewing.

**Copy Messages From A Peer Account**

You can copy messages from one subaccount to another using the options on the Home > Peers page.

1. **Important:** If you do not have a Multi-Brand account, your account does not use peers.

When you copy a message from one peer account to another, the URL for any content in the message referenced by a URL (images, links, etc.) will remain the same. Copying a message from one peer account to another will not change any URLs, including URLs for content hosted in the application.

1. Log into the subaccount you want to add the message to.
2. While in this account, go to Home > Peers.
3. Click on the name of subaccount that contains the message you want to copy.
   This is the name located in the Peer column.
4. Click the Messages tab.
5. Select the message or messages you want to copy by clicking the checkbox for each message.
6. Click the Copy to My Account button.
You should now see the copied messages in this subaccount when you go to the Messages > Messages page.

Peer Templates
The Peer Templates tab allows you to view the templates that have been created in a peer account.

⚠️ Important: If you do not have a Multi-Brand account, your account does not use peers.

You can also copy these templates from a peer's account to your account. The Peers tab lets you view all of the templates that have been created in a peer account. By default, the most recently edited templates are shown first.

You can also use the folder links on the right side of the page to navigate through the template folder hierarchy in the account you are viewing.

Copy Templates From A Peer Account
You can copy a template from a peer's account.

⚠️ Important: If you do not have a Multi-Brand account, your account does not use peers.
You can copy a template from a peer's account to your account by clicking on the checkbox next to the template(s) you want to copy, and then clicking **Copy to My Account**.

### Apps

Apps are applications developed by Bronto and by third party developers that can be used to interact with your account.

These applications are available for purchase on the **Apps Dashboard**. Bronto only provides in-depth documentation for Bronto-developed apps.

### Recommendations

With the Recommendations app you can build customized lists of relevant product recommendations using what Bronto knows about your products and contact behavior. These recommendations can be used to build highly-targeted email messages and campaigns that contain products relevant to your contacts.

**Important:** If you do not have the Recommendations app and would like information about purchasing it, see Bronto's App Center or contact your account manager.

A recommendation is a list of items from your product catalog that meet a set of criteria that you define as you build a recommendation. When you use a recommendation in a message, what products best match its criteria are determined at the time a message is sent.

There are two versions of the Recommendations app - Standard, which can build recommendations based on what Bronto knows about your products and Premium, which can build recommendations based on what Bronto knows about your products and contacts' order and browse history.

### Recommendations Standard

Recommendations Standard helps you to build recommendation lists based on what Bronto knows about your products. This includes things like a list of your top-rated products, new arrivals, or best sellers. For example, with Recommendations Standard you could:

- Build a list of high inventory items in order to promote them when you want to move inventory. Or you could build a recommendation list using the Sale Price Effective Start Date in order to promote an upcoming sale.
• Use recommendations to automate the inclusion of product data in daily or weekly promotions.
• Build a recommendation that includes small quantities of high priced items and use it to build a promotion geared towards contacts on a high spender segment or list in order to try to close out your stock.

**Important:** Recommendations uses the product data you have already imported into Bronto. If you need information about importing product data see Products.

**Recommendations Premium**
Recommendations Premium helps you to build recommendation lists based on what Bronto knows about your products and your contacts' engagement data. This intersection of contacts' order and browse history combined with product data allows you to create recommendations that are highly personalized based on contact behavior. For example, with Recommendations Premium you could:

• Build a recommendation of products that contacts frequently also buy when they have bought another product and send this recommendation to contacts who have bought the first item.
• Use information about which products are frequently ordered together to build recommendation you can use in a "Don't forget!" message.
• Build a recommendation of products that a contact is most interested in using the contact’s most recently browsed and most recently ordered products.

**Recommendations Web**
Recommendations Web can be used to design and place recommendation blocks on your website using the recommendations built with either Recommendations Standard or Premium. Recommendations Web is a paid for app that can be accessed from the Tables menu. When you have the app, you will see + Web after either Recommendations Standard or Recommendations Premium in the Tables menu.

For more information about Recommendations Web, see Recommendations Web on page 1438.

**Before You Can Begin**
Recommendations uses data stored in Bronto, so the quality of a recommendation can only be as good as the data it's built upon. Therefore, before you begin using Recommendations you should:

• Import a product catalog and implement a plan for keeping your product data up-to-date. The more robust and accurate your product data is, the better your recommendation results will be. See Products for more information.
• If you have product variations, make sure that your catalog uses Parent Product IDs to link variant products. A parent product is the main product record for a group of products that are variations of each other. The parent product should not have a value saved in Bronto for its Parent Product ID. The Product ID for the parent product should be stored as the Parent Product ID for all of its variants. Each variant will have its own unique Product ID. Using this parent product and variant model allows Bronto to see more in depth connections between products, which leads to more sophisticated recommendation results.
• Import historical product data into Bronto in order to create a rich set of data for Recommendations to pull from. These historical records should have archived status in Bronto so they are not used in recommendations.

**Tip:** Bronto automatically archives products when product data that was previously imported is not in the most recent import file. So to archive historical records, import a data feed that contains your historical product data and then immediately import the product data feed that only contains your current product data.

For Recommendations Premium you should also:

• Configure Bronto to capture contacts' browse activity. Recommendations can use up to 90 days of a contact's browse data. See Capture Browse Data on page 1463 for more information.
• Make sure you're using Bronto's order service and check that you've properly configured Bronto to capture order data.
• Verify that the product IDs coming from your order data match the product IDs in your catalog.
If you recently configured order service, import historical order data into Bronto. Bronto can use up to 5 quarters of order data when building recommendations so the more data you have the better the recommendations will be.

**Building Recommendations**

Bronto provides recommendation templates that cover common use cases. These templates can be used as a foundation to build more complex recommendations. But you aren't limited to just these scenarios - any product field in your product catalog can be used to build general recommendation criteria.

With Recommendations Premium, you also have the option of building personalized recommendations using Bronto predictive models and/or personalized settings. The available predictive models are defined in Create A Premium Recommendation on page 1423. Personalized settings are special filters that are applied using a point-of-reference product or contact. For example, you might want to limit a list of recommendations to products that are the same brand as your reference product. To do this you would set Related Products criteria and include the reference product in your message or configure settings on the Reference Products tab of the recommendation as you create it.

The results of a recommendation automatically update as changes are made to your data in Bronto. Therefore, the more up-to-date your product, order, and/or browse data is the better your recommendations will be.

**Draft vs Published**

Any recommendation can exist in up to two versions:

- Draft: A draft recommendation reflects the most recent edits to a recommendation, but a draft recommendation cannot be used until it is published.
- Published: A published recommendation is the version of the recommendation that can be used. You can edit a published recommendation, but this creates a draft version of the recommendation where your edits will be saved until the draft version is published. A published recommendation can be made either active (available for use) or inactive (not available for use).

Each recommendation can only have one draft and one published version. When you publish a draft, the previously published version of a recommendation is overwritten.

Published recommendations can be included in messages using rec loops. The product information that corresponds with your rec loop settings will be inserted into the message when it is sent. Replacing rec loop placeholders at the time a message is sent allows Bronto to provide up-to-date recommendations. See Recommendation Messages on page 1429 for more information.

The first time you use Recommendations you should:

- Configure Recommendations Global Settings on page 1418
- Create A Standard Recommendation on page 1419 or Create A Premium Recommendation on page 1423
- Publish A Recommendation on page 1428

**Related Topics**

**Products**

Capture Browse Data on page 1463

You can configure Bronto to capture browse data from your site. Browse data is information about which products your contacts view.

**Recommendations Tips And Troubleshooting**

This topic is meant to help you quickly navigate different actions in the app and to provide troubleshooting advice. For more detailed instructions, see the topic related to what you want to accomplish.

**How To**

This section is a quick start for things you can do in the app. For more detailed instructions, see the topic related to what you want to accomplish.
<table>
<thead>
<tr>
<th>To Do This:</th>
<th>Do This:</th>
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</table>
| Create a recommendation | 1. Navigate to the **Recommendations** page by clicking the [home] icon and click **New Recommendation**.  
2. Configure your recommendation and set up the criteria and priorities to use for the recommendation.  
3. Click **Preview Results** to see the results of your recommendation and continue to tweak the recommendation settings until you're happy with the results. If you're building a premium recommendation you need to provide a reference contact and/or a reference product to see the recommendation results.  
4. Click **Publish Draft** to publish the recommendation. If you want to exit the recommendation without publishing it, click the [home] icon to return to the **Recommendations** page. The recommendation will be saved as a draft.  
For more details about each option see Create A Standard Recommendation on page 1419 or Create A Premium Recommendation on page 1423. |
| Preview the results of a recommendation | If you have a recommendation open, click **Preview Results**. If you do not have a recommendation open:  
1. Navigate to the **Recommendations** page by clicking the [home] icon.  
2. Click on a recommendation to open it.  
3. Optional: If you have both a draft and a published version of a recommendation,  
   • Click **View Published Version** if you want to see what the settings and results are for the available version of the recommendation.  
   • Click **Edit Draft** if you want to see what the results are for the draft version of the recommendation.  
4. Click **Preview Results**. If you're building a premium recommendation you need to provide a reference contact and/or a reference product to see the recommendation results. |
| Publish a recommendation | If you have the recommendation open, click **Publish Draft**. If you do not have the recommendation open:  
1. Navigate to the **Recommendations** page by clicking the [home] icon.  
2. Click on a recommendation to open it.  
3. Optional: If you have both a draft and a published version of a recommendation click **Edit Draft**.  
4. Click **Publish Draft**.  
For more information see Publish A Recommendation on page 1428. |
<table>
<thead>
<tr>
<th>To Do This:</th>
<th>Do This:</th>
</tr>
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</table>
| View a recommendation | 1. Navigate to the **Recommendations** page by clicking the 🏘 icon.  
2. Click on a recommendation to open it.  
3. Optional: If you have both a draft and a published version of a recommendation,  
   • Click **View Published Version** if you want to see what the results are for the available version of the recommendation. You may need to provide a reference contact or reference product to see the recommendation results.  
   • Click **Edit Draft** if you want to see what the results are for the draft version of the recommendation. If you're building a premium recommendation, you may need to provide a reference contact or reference product to see the recommendation results.  

The recommendation will open in an editable view and you can see all of the current settings on its summary card. |
| Edit a recommendation | 1. Navigate to the **Recommendations** page by clicking the 🏘 icon.  
2. Click the pencil icon ✏️ associated with the recommendation you want to edit.  
3. If a window is displayed, click **Edit Draft**.  
4. Edit the configuration, criteria, and/or priorities for the recommendation.  
5. Click **Publish Draft** to publish the recommendation. If you want to exit the recommendation without publishing it, click the 🏘 icon to return to the **Recommendations** page. Your changes will be saved to the existing draft.  

For more details about each option see **Create A Standard Recommendation** on page 1419 or **Create A Premium Recommendation** on page 1423. |
| Delete a recommendation | 1. Navigate to the **Recommendations** page by clicking the 🏘 icon.  
2. Click the X icon associated with the recommendation you want to delete.  
3. Click **Yes** to delete the recommendation. |
| Discard the draft of a recommendation | If you have the recommendation open, click **Discard Draft**. If you do not have the recommendation open:  
1. Navigate to the **Recommendations** page by clicking the 🏘 icon.  
2. Click on the recommendation name.  
3. Click **Discard Draft**. |
| Create a copy of a recommendation | 1. Navigate to the **Recommendations** page by clicking the 🏘 icon.  
2. Click the clipboard icon 🗄️ associated with the recommendation you want to copy.  
3. Enter the name for the new recommendation in the **Label** box.  
4. Premium only: If desired, select a predictive model.  
5. Enter a description for the new recommendation.  
6. Click **Copy Recommendation**. |
<table>
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<tr>
<th>To Do This:</th>
<th>Do This:</th>
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</table>
| **Activate or deactivate a recommendation** | **1.** Navigate to the **Recommendations** page by clicking the ![icon](icon.png).  
**2.** Click the **Active/Inactive** switch associated with the recommendation you want to change the status of. Green means active and white means inactive.  
**3.** If a window is displayed, click **Yes**.  
For more information see **Activate Or Deactivate A Recommendation** on page 1428. |
| ** Quickly view the current settings for all of your recommendations** | **1.** Navigate to the reports by clicking the ![icon](icon.png).  
**2.** Click **Published Settings** report. |
| **Receive app notifications in the platform** | **1.** Navigate to the global settings by clicking the ![icon](icon.png).  
**2.** Check the **Receive platform notifications** box to receive notifications in Bronto.  
**3.** Check the **Receive email notifications** box and enter the relevant email address in the **Email Address** box to receive email notifications.  
**4.** Click **Publish Changes**. |
| **Set a default recommendation at the app level** | **1.** Navigate to the global settings by clicking the ![icon](icon.png).  
**2.** Select a recommendation from the **Select Default Recommendation** list.  
This list contains published, active standard recommendations you have built and a **Bronto Predefined Default** option. **Bronto Predefined Default** is the default value for **Select Default Recommendation**. If you choose **Bronto Predefined Default**, products from your product catalog will be randomly selected. You can edit the **Bronto Predefined Default** or delete it if you do not want to use it.  
**3.** Click **Publish Changes**.  
For more information see **Configure Recommendations Global Settings** on page 1418. |
| **Set global criteria that can be applied to multiple recommendations** | **1.** Navigate to the global settings by clicking the ![icon](icon.png).  
**2.** Click **add** located next to **Global Criteria**.  
**3.** Select a product field to use from the **Field** list.  
**4.** Select the rule you want to apply to the field from the **Operator** list.  
**5.** Enter or select the value you want the criteria to meet in the **Value** box.  
**6.** Click **Save & Close** to save your criteria and move on or **Save & Add Another** to save your criteria and add another global criteria option.  
**7.** Click **Publish Changes**.  
For more information see **Configure Recommendations Global Settings** on page 1418. |

**Troubleshooting**

This section provides quick resolutions for common issues that you may encounter.
<table>
<thead>
<tr>
<th>Issue</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product content doesn’t align across the row</td>
<td>This can be either due to inconsistent image sizes or product content wrapping across rows. It's a best practice to have an image product field stored in Bronto that contains images scaled at a size that's appropriate for use in emails. Product wrapping issues can be solved by using CSS to set the height of the content in a container to account for wrapping.</td>
</tr>
</tbody>
</table>
| Preview of recommendation results is blank | Either:  
- The reference contact or reference product you're using to generate the preview isn't producing results due to a lack of historical data. To fix this use a different reference contact and/or product.  
- The criteria you set are too restrictive and your recommendation cannot produce results.  
- You haven't clicked the Preview button yet. |
| Recommendations aren’t returning selected option for parent or variations | This can occur when Parent or Parent Product ID data is missing from your product catalog. To fix this make sure that you have parent and variation products properly imported and mapped.  
A parent product is the main product record for a group of products that are variations of each other. The parent product should not have a value saved in Bronto for its Parent Product ID. The Product ID for the parent product should be stored as the Parent Product ID for all of its variants. Each variant will have its own unique Product ID. |
| Recommendation based on reference products are blank | This can occur because a reference product was not provided. Possible ways to fix this:  
- Add a product placeholder to your message to display product to use as reference product.  
- Ensure API loops are using product tag with Product ID as “placeholder”.  
- Ensure message is initiated by workflow with Cart is Abandoned or Order is Added trigger node.  
A second reason this can happen is because a reference product doesn't produce results due to lack of historical data. To fix this:  
- Provide more reference products.  
- Store description, brand and category in product catalog for best product content matching.  
- Use a backup and/or default recommendation in order to make sure there are enough product recommendations. |
| Recommendation based on a contact’s history is blank | One reason this can happen is if a contact has little to no order and/or browse history. The only solution for this is to make sure you use segments or lists that contain contacts with a full set of historical data when you send a recommendation message based on contact history.  
A second reason this may happen is because your reference products don’t have results due to lack of historical data. To fix this:  
- Store description, brand and category in product catalog for best product content matching.  
- Use a backup and/or default recommendations in order to make sure there are enough product recommendations. |
### Related Topics

**Browse Settings** on page 1462
Browse settings can capture product page views on your site and send this data to Bronto for use in Recommendations Premium and Browse Recovery messages.

**Workflow Trigger Nodes** on page 356
Triggers nodes represent events that occur in your account which kickoff (or start) a workflow.

### Recommendations Home Page

The **Recommendations Home** page is where you can view and manage your product recommendations.

This page can be accessed by clicking the 🏛️ icon located in the left navigation bar.

On the Recommendations page you can see a list of the recommendations you have created in your account with high-level information about each recommendation. The Versions column shows which version the recommendation is currently in.

The Type column is only displayed if you have Recommendations Premium. In the Type column Premium users can see whether a recommendation is standard or premium. All Recommendations Standard recommendations are standard recommendations, which means they’re built based on what Bronto knows about your products. A
Recommendation Premium recommendation can be either standard, based on product data, or premium, based on product and order/browse data for a contact.

Any recommendation can exist in up to two versions:

- **Draft**: A draft recommendation reflects the most recent edits to a recommendation, but a draft recommendation cannot be used until it is published.
- **Published**: A published recommendation is the version of the recommendation that can be used. You can edit a published recommendation, but this creates a draft version of the recommendation where your edits will be saved until the draft version is published. A published recommendation can be made either active (available for use) or inactive (not available for use).

Using the **Recommendations** page you have the option to edit, copy, or delete any of your recommendations or you can make published recommendations **Active** or **Inactive** using the **Active/Inactive** toggle. Active recommendations are available for use in your marketing campaigns. Inactive recommendations are not available. You should not make a recommendation inactive if you are currently using it.

To view a recommendation, click on the name of the recommendation or the edit icon. If you have both a draft and published version of a recommendation, a pop up window will be displayed that allows you to choose whether you want to view the published version, to continue editing your draft (which allows you to view the draft), or to discard the current draft.

You can also create a new recommendation by clicking the **New Recommendation** button on the **Recommendations** page. For more information see **Create A Standard Recommendation** on page 1419 or **Create A Premium Recommendation** on page 1423.

### Configure Recommendations Global Settings

The Recommendations Global Settings page is how you set up the global configuration options for the Recommendations app.

On the Global Settings page you can:

- Indicate your notification preferences
- Select a default recommendation that can be used to flush out a list of recommendations when the settings in a recommendation don't return enough results
- Set up global criteria that can be applied to any recommendation

Global setting configuration is the same for Standard and Premium.

1. In Recommendations, click the 📭 icon.
2. Set up your notification preferences in the **Communication Information** area:
   a) If you want to receive Recommendations notifications as alerts in Bronto, check the **Receive platform notifications** box.
   b) If you want to receive Recommendations notifications via email, check the **Receive email notifications** box and enter the relevant email address in the **Email Address** box.
3. Select a recommendation from the **Select Default Recommendation** list to set the default recommendation to use when you have recommendations that don't provide the desired number of results.

   This list contains published, active standard recommendations you have built and a **Bronto Predefined Default** option. **Bronto Predefined Default** is the default value for **Select Default Recommendation**. If you choose **Bronto Predefined Default**, products from your product catalog will be randomly selected. You can edit the **Bronto Predefined Default** or delete it if you do not want to use it.

   The default recommendation you select should be very generic in order to ensure that it returns enough results.

   When you create an individual recommendation, you will need to configure it to use the default recommendation if you want it to use the default recommendation you set here.
4. Click **add** to add global criteria that can be applied to recommendations:
a) Select a field to use from the Field list.

See either product, commerce, or browse fields for more information about what each of these fields are.

b) Select the rule you want to apply to the field from the Operator list.

c) Enter or select the value you want the criteria to meet in the Value box.

The Operators and Values you see are determined by the type of Field you selected. While there are several types of fields, these fields fall into three main categories:

- Date-based. When you select a date-based field, you can specify either an exact date or a range of days relative to the operator you selected. For example, you can set a date range within the next week by selecting On or Before and entering 7 for the days from now value.
- Numeric. When you select a numeric field, you can specify an exact number or a number range that is relative to your Operator.
- Text-based. There are a few rules for text-based fields, which are basically any field that isn't a date or number. If your Operator is set to Equals or Does Not Equal, the content you enter for Value must be an exact match for the information stored in the field, including capitalization. For the operators In, Not In, Contains, or Does Not Contain the values entered must be provided in a comma-separated list and each individual value must be in quotes. For example: "Sneakers", "Shoes, High tops", "Shoes, Hightops", "Shoes, High-tops", "Tennis shoes". In this example, the comma between shoes and high tops is included as part of the field in the database. The use of quotes lets Recommendations identify the difference between this type of comma and a comma separating items in your list of Values. The quotes are always required, even if there is only one item in your list.

Some Field and Operator combinations may not require a Value.

After you enter your value, you can click to see how many products in your catalog match the criteria you specified.

d) Click Save & Close to save your criteria and move on or Save & Add Another to save your criteria and add another global criteria option.

Note: You still have to click Publish Changes for these criteria to be available for your recommendations.

After it is set up, the global criteria can be applied to any recommendation but are not applied by default. When you apply global criteria, all of the global criteria rules you have set up are used. You cannot pick and choose which ones to apply. Therefore, it's a good idea to keep the global criteria rules to general rules you want to use frequently, such as only returning items that are in stock.

5. Click

- Publish Changes to save your changes and apply them.
- Discard Changes if you do not want to save or apply your changes to the app.

Create A Standard Recommendation

A recommendation is a combination of criteria and priority settings that are used to created a targeted list of products from your product catalog. A standard recommendation can only be built using product data.

If you want to build a recommendation using predictive models, related product criteria, or filters based on a reference contact or product you need to build a premium recommendation.

Building a standard recommendation is broken into three functional areas:

- General Settings are the configuration options for the recommendation.
- Product Criteria are the rules that you apply to your product data in order to determine which products qualify for the recommendation.
- Priorities determine how the products that meet the product criteria settings are sorted and ranked against each other.

When you create your recommendation, the changes you make are automatically saved as a draft version of the recommendation. This allows you to use the Preview Results button to view the results of your recommendation.
as you build it so you can adjust your recommendation until you're happy with your results. If you exit the recommendation while you are creating it without publishing it, all of the settings, priorities, and criteria you created and saved will be kept as a draft.

Once created, this can be used to design dynamic emails that will always include the latest, most relevant products from the recommendation you use in your message.

To create a recommendation:

1. In Recommendations, navigate to the Recommendations page by clicking the icon.
2. Click New Recommendation.
   The Create Recommendation window is displayed.
3. Enter a name for your recommendation in the Label box.
   The name can only contain alphanumeric characters.
4. If desired, enter a brief description for the recommendation in the Description box.
5. Click Create Recommendation.
   The Recommendation Settings page is displayed.
6. If you are not already on the General Settings tab, click General Settings.
7. Select a recommendation from the Use Backup list if you want to use another recommendation you created if this one doesn't return enough relevant results.
   This is a list of the active, standard recommendations you have published. If you do not have any other recommendations or do not want to use a backup, select Don't Use.
8. Set Use Default to On if you want to use the default backup recommendation you configured for your account.
   If this is set to on, the default recommendations are only used when your recommendation (and backup recommendations) do not provide the number of desired results.
9. Click Product Criteria to open the Product Criteria tab.
10. Select an option for Restrict Parent/Variation Results to:

    In order to use this, you must use the Parent Product ID field in your product catalog. When a product has a parent and multiple variations of that parent, this setting will determine which product results to use in your recommendation. For example, you might want to limit a result to One Variation Only if the variant products are very similar and might result in what appears to be duplicate recommendations. (Items of a same color, for example.)

    No matter what you select, any product that isn't a parent or variation will be included in the recommendation results if it matches the other criteria you set for the recommendation.

    • Parent Only if you want your recommendation to only include parent products that match the recommendation's criteria.
    • One Variation Only if you want to only include the variation product that best matches the recommendation's criteria.
    • Multiple Variations Only if you want to include all variant products that match the recommendation's criteria.
    • Parent and Multiple Variations if you want to include any product, parent or variation, that matches the recommendation's criteria.

    Note: If you update your product catalog to include Parent Product IDs after the recommendation is built then all parents and variant products that match the recommendation criteria are included by default. If you want to limit what is included, you will need to edit the recommendation and change the Restrict Parent/Variation Results to setting.

11. Set Set Inventory Minimums to On if you want to ensure that only products with a certain amount of stock are returned.
This setting uses the value stored in the Inventory Threshold and Quantity product fields. Only products that have a Quantity amount that is equal to or greater than the value in the Inventory Threshold will be returned when Set Inventory Minimums is set to On.

12. Set Use Global Criteria to On if you want to use the default criteria you configured for your account.

When you set this to on, the Global Criteria you have set up are displayed on this page.

13. If you want to include a single criteria setting that you can customize within the Rec Loop of a message:

   Use Request Time Criteria lets you reuse a recommendation for multiple purposes by providing a single, dynamic field that can be modified at the message level. You will set the field and operator here, and then provide the value you want to use within the message. For example, you could build a recommendation where Use Request Time Criteria is set to Product Category equals and then use the recommendation to feature different product categories in different emails.

   a) Set Use Request Time Criteria to On.
   b) Select a field from the first list.
      
      See either product, commerce, or browse field help topics for more information about what each of these fields are.
   c) Select an operator from the second list.
      
      The Operators you see are determined by the type of Field you selected. See step 15 c for more information about each type of operator.
   d) When you use this recommendation in a message, map the value you want to use within the Rec Loop.

      See Recommendation Messages on page 1429 for information on how to do this. If you set Use Request Time Criteria in your recommendation but do not set a value in an email that uses the recommendation then this field will be ignored.

14. Click add, located to the right of Criteria, to set up the criteria used in the recommendation:

   a) Select a field to use from the Field list.
      
      See either product, commerce, or browse fields for more information about what each of these fields are.
   b) Select the rule you want to apply to the field from the Operator list.
   c) Enter or select the value you want the criteria to meet in the Value box.
      
      The Operators and Values you see are determined by the type of Field you selected. While there are several types of fields, these fields fall into three main categories:

      • Date-based. When you select a date-based field, you can specify either an exact date or a range of days relative to the operator you selected. For example, you can set a date range within the next week by selecting On or Before and entering 7 for the days from now value.
      • Numeric. When you select a numeric field, you can specify an exact number or a number range that is relative to your Operator.
      • Text-based. There are a few rules for text-based fields, which are basically any field that isn't a date or number. If your Operator is set to Equals or Does Not Equal, the content you enter for Value must be an exact match for the information stored in the field, including capitalization. For the operators In, Not In, Contains, or Does Not Contain the values entered must be provided in a comma-separated list and each individual value must be in quotes. For example: "Sneakers", "Shoes, High tops", "Shoes, Hightops", "Shoes, High-tops", "Tennis shoes". In this example, the comma between shoes and high tops is included as part of the field in the database. The use of quotes lets Recommendations identify the difference between this type of comma and a comma separating items in your list of Values. The quotes are always required, even if there is only one item in your list.

      Some Field and Operator combinations may not require a Value.

      After you enter your value, you can click ✂ to see how many products in your catalog match the criteria you specified.
   d) Click Save & Close to save your criteria and move on or Save & Add Another to save your criteria and add another global criteria option.
Note: You still have to click Publish Changes for these criteria to be available for your recommendations.

For example, if you are creating a recommendation for items targeted to women, Field is set to Gender, Operator is set to Equals, and the Value is the word your product data uses to indicate it is a woman's item.

15. Click Priorities to open the Priorities tab and define your product priorities:

When setting priorities, do not use the same values you used for your criteria settings. Instead, identify how you want to rank the products that match your recommendation criteria against each other. Each recommendation can have no more than three priorities. If you try to add more than three, you will be asked to delete one of the existing priorities before adding a new one.

a) Choose an option from the Apply Randomness to Results dropdown.
   - Do Not Use- This is the default option.
   - Randomize Best Results- Products that meet both your recommendation's criteria and priorities will be randomized.
   - Randomize All Results- All of the products that meet the recommendation's criteria will be randomized.
   
   Note: If you select this option, you can not add a priority.

b) Click add located to the right of Priorities.

c) Select a system, product, commerce, or browse field to use from the Field list.

d) Select the rule you want to apply to the field from the Operator list.

e) Enter or select the value you want the criteria to meet in the Value box.

All of the rules outlined in the step regarding criteria also apply to the Field, Operator, and Value options for priority. Additionally, you have the option to select ranking-based values from the Operator list. For example, you can set a date from newest to oldest or a numerical value from lowest to highest, etc.

f) Select the priority from the Priority Level list.

Priority is a way of creating a hierarchy of products within your recommendation results:

- **Strongly Upgrade** Products that match the priority settings are given a significant boost in the results. For example, if a priority is based on Price Highest to Lowest, the highest priced items are ranked highest in the results and the lowest priced items are not boosted in the rankings.

- **Slightly Upgrade** Products that match the priority settings are given a boost in the recommendation results, but the boost is less than those with Strongly Upgrade.

- **Slightly Downgrade** Products that match the priority settings are given a downgrade in their relevance in the results.

- **Strongly Downgrade** Products that match the priority settings are given a significant downgrade in their relevance in the results. For example, if a priority is based on Price Highest to Lowest, the highest priced items are ranked much lower in the results, and the lowest priced items are not given a downgrade.

So, if your criteria is women’s items and you want to make sure you recommend items you have a large stock of, you can set up the priority with Field set to Quantity, Operator set to Highest to Lowest, and Priority Level set to Strong Upgrade in order to make sure items with a large quantity are surfaced higher in the list of recommendations.

16. To preview the results of your recommendation, click the Preview Results button.

This provides a preview of the products that match the recommendation criteria and settings, as well as the number and percentage of products that matched your recommendation. The Preview list can be switched between a list view or an card view. Each view provides a slightly different overview of the products. Click on any product name to see the complete details for the product.

If you update your recommendation with new criteria or priority settings then return to the Preview tab you will see these updates reflected in the recommendations on this page.

17. Optional: If you are finished building the recommendation, click Publish Draft to make the recommendation available for use.
You do not have to click **Publish Draft** to save your recommendation.

### Create A Premium Recommendation

A recommendation is a combination of criteria and priority settings that are used to create a targeted list of products from your product catalog. A premium recommendation uses predictive models or filters based on a reference contact or reference products in order to create highly-personalized product recommendations. You can build a standard recommendation using either Recommendations Standard or Premium, but you must have Recommendations Premium to create a premium recommendation.

Building a premium recommendation is broken into six functional areas:

- **General Settings** are the configuration options for the recommendation.
- **Product Criteria** are the rules that you apply to your product data in order to determine which products qualify for the recommendation.
- **Related Products Criteria** are filters that can limit the recommendation results based on how products in your catalog relate to a reference product.
- **Contact History Criteria** are filters that can limit the recommendation results based on contacts' order and browse data.
- **Priorities** determine how the products that meet the product criteria settings are sorted and ranked against each other.
- **Reference Products** are settings that can be used to identify how Bronto should determine the reference products used for a recommendation.

When you create your recommendation, the changes you make are automatically saved as a draft version of the recommendation. This allows you to use the **Preview Results** button to view the results of your recommendation as you build it so you can adjust your recommendation until you're happy with your results. If you exit the recommendation while you are creating it without publishing it, all of the settings, priorities, and criteria you created and saved will be kept as a draft.

Once created, this can be used to design dynamic emails that will always include the latest, most relevant products from the recommendation you use in your message.

To create a recommendation:

1. In Recommendations, navigate to the **Recommendations** page by clicking the **🏠** icon.
2. Click **New Recommendation**.
   
   The Create Recommendation window is displayed.
3. Enter a name for your recommendation in the **Label** box.
   
   The name can only contain alphanumeric characters.
4. If desired, turn **Predictive Model** to **On** and select a predictive model to use for the recommendation.

   Bronto's predictive models use patterns of behavior related to a reference product in order to provide recommendation results. You don't have to use a predictive model to create a personalized recommendation. The available predictive models are:

   - **Bought This Bought That** returns a set of products typically bought by customers who bought the reference product.
   - **Frequently Bought Together** returns a set of products typically bought by customers in the same order in which they bought the reference product.
   - **Browsed This Browsed That** returns a set of products typically browsed by customers who browsed the reference product.
   - **Browsed This Bought That** returns a set of products typically bought by customers who browsed the reference product.
   - **Best Product** returns a set of products the reference contact would be most interested in using the contact’s 10 most recently browsed products and 10 most recently ordered products as reference products.
• **Similar Content Products** returns a set of products that have similar words in the title, description, brand and product category fields (if mapped). For this recommendation to be effective, if your site has multiple variations of the same base product in your product catalog, you will want to leverage the Parent Product ID field to group these products and enable the **Restrict Parent/Variation Results to** option on the recommendation so your results aren’t monopolized by these products based on their near-identical product content.

You cannot change a recommendation's predictive model setting once you create it. The results of predictive models are recalculated nightly.

5. If desired, enter a brief description for the recommendation in the **Description** box.

6. Click **Create Recommendation**.

   The Recommendation Settings page is displayed.

7. If you are not already on the **General Settings** tab, click **General Settings**.

   a) Select a recommendation from the **Use Backup** list if you want to use another recommendation you created if this one doesn't return enough relevant results.

   This is a list of the active recommendations you have built. If you do not have any other recommendations or do not want to use a backup, select Don't Use.

   b) Set **Use Default** to **On** if you want to use the default backup recommendation you configured for your account.

   If this is set to on, the default recommendations are only used when your recommendation (and backup recommendations) do not provide the number of desired results.

8. Click **Product Criteria** to open the **Product Criteria** tab.

9. Select an option for **Restrict Parent/Variation Results to**

   In order to use this, you must use the Parent Product ID field in your product catalog When a product has a parent and multiple variations of that parent, this setting will determine which product results to use in your recommendation. For example, you might want to limit a result to **One Variation Only** if the variant products are very similar and might result in what appears to be duplicate recommendations. (Items of a same color, for example.)

   No matter what you select any product that isn't a parent or variation will be included in the recommendation results if it matches the other criteria you set for the recommendation.

   • **Parent Only** if you want your recommendation to only include parent products that match the recommendation's criteria.

   • **One Variation Only** if you want to only include the variation product that best matches the recommendation's criteria.

   • **Multiple Variations Only** if you want to include the variation products that match the recommendation's criteria.

   • **Parent and Multiple Variations** if you want to include any product, parent or variation, that matches the recommendation's criteria.

10. Set **Set Inventory Minimums** to **On** if you want to ensure that only products with a certain amount of stock are returned.

   This setting uses the value stored in the Inventory Threshold and Quantity product fields. Only products that have a Quantity amount that is equal to or greater than the value in the Inventory Threshold will be returned when **Set Inventory Minimums** is set to **On**.

11. Set **Use Global Criteria** to **On** if you want to use the default criteria you configured for your account.

   When you set this to on, the Global Criteria you have set up are displayed on this page.

12. If you want to include a single criteria setting that you can customize within the Rec Loop of a message:
**Use Request Time Criteria** lets you reuse a recommendation for multiple purposes by providing a single, dynamic field that can be modified at the message level. You will set the field and operator here, and then provide the value you want to use within the message. For example, you could build a recommendation where **Use Request Time Criteria** is set to **Product Category equals** and then use the recommendation to feature different product categories in different emails.

a) Set **Use Request Time Criteria** to **On**.
b) Select a **field** from the first list.
   
   See either **product**, **commerce**, or **browse** field help topics for more information about what each of these fields are.
c) Select an **operator** from the second list.
   
   The **Operators** you see are determined by the type of **Field** you selected. See step 15 c for more information about each type of operator.
d) When you use this recommendation in a message, map the value you want to use within the Rec Loop.
   
   See **Recommendation Messages** on page 1429 for information on how to do this. If you set **Use Request Time Criteria** in your recommendation but do not set a value in an email that uses the recommendation then this field will be ignored.

13. Click **add**, located to the right of **Criteria**, to set up the criteria used in the recommendation:

a) Select a field to use from the **Field** list.
   
   See either **product**, **commerce**, or **browse** fields for more information about what each of these fields are.
b) Select the rule you want to apply to the field from the **Operator** list.
c) Enter or select the value you want the criteria to meet in the **Value** box.
   
   The **Operators** and **Values** you see are determined by the type of **Field** you selected. While there are several types of fields, these fields fall into three main categories:

   - **Date-based.** When you select a date-based field, you can specify either an exact date or a range of days relative to the operator you selected. For example, you can set a date range within the next week by selecting **On or Before** and entering 7 for the **days from now** value.
   - **Numeric.** When you select a numeric field, you can specify an exact number or a number range that is relative to your **Operator**.
   - **Text-based.** There are a few rules for text-based fields, which are basically any field that isn't a date or number. If your **Operator** is set to **Equals** or **Does Not Equal**, the content you enter for **Value** must be an exact match for the information stored in the field, including capitalization. For the operators **In**, **Not In**, **Contains**, or **Does Not Contain** the values entered must be provided in a comma-separated list and each individual value must be in quotes. For example: "Sneakers", "Shoes, High tops", "Shoes, Hightops", "Shoes, High-tops", "Tennis shoes". In this example, the comma between shoes and high tops is included as part of the field in the database. The use of quotes lets Recommendations identify the difference between this type of comma and a comma separating items in your list of **Values**. The quotes are always required, even if there is only one item in your list.

   Some **Field** and **Operator** combinations may not require a **Value**.

   After you enter your value, you can click **○** to see how many products in your catalog match the criteria you specified.

d) Click **Save & Close** to save your criteria and move on or **Save & Add Another** to save your criteria and add another global criteria option.

   **Note:** You still have to click **Publish Changes** for these criteria to be available for your recommendations.

For example, if you are creating a recommendation for items targeted to women, **Field** is set to **Gender**, **Operator** is set to **Equals**, and the **Value** is the word your product data uses to indicate it is a woman's item.
14. Click the Related Products Criteria tab to filter the recommendation results based on how products in your catalog relate to a reference product:

a) Set Same Brand/Category to On in order to include or exclude products from the same brand or category as the reference product.

These options are only available if you have the brand and category product fields mapped in your product catalog. Select:

- **Exclude Products from the Same Brand** to exclude products that have the same brand in your product catalog from being included as a recommendation.
- **Limit Products to the Same Brand** to limit recommendations to products that have the same brand in your product catalog.
- **Exclude Products from the Same Category** to exclude products that have the same product category in your product catalog from being included as a recommendation.
- **Limit Products to the Same Category** to limit recommendations to products that have the same product category in your product catalog.

b) Set Specified Products to On in order to either limit the results to items that are whitelisted in your product catalog or exclude items that are blacklisted in your product catalog.

For the given reference products, the entire list of whitelist or blacklist products will be consolidated, and the first 250 random products will be used. The other products will be ignored from the criteria.

**Note:** These options are only available if you have the product whitelist and product blacklist fields mapped in your product catalog.

c) Set Similarly Priced to On in order to set a price range recommended products should fall into.

This price range will be within a percentage of the reference product. Select:

- **Within** to have recommendations be items that are priced no lower or higher than the set percentage.
- **Greater Than** to have recommendations be items that are priced equal to or up to the indicated percentage higher than the reference product.
- **Less Than** to have recommendations be items that are priced equal to or up to the indicated percentage lower than the reference product.

then enter the percentage within the box. For example, you select **Less Than** and set the percentage to 10%. If the reference product costs $100 then all recommendations will be between $90 - $100.

15. Click the Contact History tab to set filter criteria based on a contact's order and browse behavior.

These settings will use the order and browse data for the contact who is sent the message.

a) To prevent a contact from seeing a recommendation for an item they recently ordered set Exclude Ordered Products to On and indicate how many days back you want order data to be considered.

Up to the last 250 products ordered will be excluded within the time period specified by the user.

b) To make sure only products a contact recently browsed are in the recommendation set Limit Results to Browsed Products to On and indicate how many days back you want browse data to be considered.

Up to the last 250 products browsed will be excluded within the time period specified by the user.

16. Click the Priorities tab to define your product priorities:

**Note:** Priorities tab is not available when you have a predictive model associated with your recommendation.

When setting priorities, do not use the same values you used for your criteria settings. Instead, identify how you want to rank the products that match your recommendation criteria against each other. Each recommendation can have no more than three priorities. If you try to add more than three, you will be asked to delete one of the existing priorities before adding a new one.

a) Choose an option from the Apply Randomness to Results dropdown.
• **Do Not Use**- This is the default option.
• **Randomize Best Results**- Products that meet both your recommendation's criteria and priorities will be randomized.
• **Randomize All Results**- All of the products that meet the recommendation's criteria will be randomized.

  **Note:** If you select this option, you can not add a priority.

b) Click **add** located to the right of Priorities.
c) Select a field to use from the **Field** list.

  For Recommendations Standard or Premium you can select product fields and for Recommendations Premium you can also select commerce or browse fields.
d) Select the rule you want to apply to the field from the **Operator** list.
e) Enter or select the value you want the criteria to meet in the **Value** box.

  All of the rules outlined in the step regarding criteria also apply to the **Field**, **Operator**, and **Value** options for priority. Additionally, you have the option to select ranking-based values from the **Operator** list. For example, you can set a date from newest to oldest or a numerical value from lowest to highest, etc.
f) Select the priority from the **Priority Level** list.

  Priority is a way of creating a hierarchy of products within your recommendation results:

  • **Strongly Upgrade** Products that match the priority settings are given a significant boost in the results. For example, if a priority is based on **Price Highest to Lowest**, the highest priced items are ranked highest in the results and the lowest priced items are not boosted in the rankings.
  • **Slightly Upgrade** Products that match the priority settings are given a boost in the recommendation results, but the boost is less than those with **Strongly Upgrade**.
  • **Slightly Downgrade** Products that match the priority settings are given a downgrade in their relevance in the results.
  • **Strongly Downgrade** Products that match the priority settings are given a significant downgrade in their relevance in the results. For example, if a priority is based on **Price Highest to Lowest**, the highest priced items are ranked much lower in the results, and the lowest priced items are not given a downgrade.

So, if your criteria is women's items and you want to make sure you recommend items you have a large stock of, you can set up the priority with **Field** set to **Quantity**, **Operator** set to **Highest to Lowest**, and **Priority Level** set to **Strong Upgrade** in order to make sure items with a large quantity are surfaced higher in the list of recommendations.

17. Click the **Reference Products** tab to filter recommendation results based on recent contact behavior.

  The options you set on this tab determine what the reference products are, not which products are included in the recommendation results. If you set reference products here then any products in your email will not be used as reference products.

  a) Turn **Recently Browsed Products** to **On** in order to base recommendation results on the last 10 products a contact has looked at.
  b) Turn **Recently Ordered Products** to **On** and select a date range in order to base recommendation results on the last 10 products a contact bought within that many days.

  This option is not available if you are using the **Browsed This Bought That** predictive model.

18. To preview the results of your recommendation, click the **Preview Results** button.

  This provides a preview of the products that match the recommendation criteria and settings. If you have settings that are based on a reference product or reference contact, you will need to enter an example contact email address and/or Product ID in order to see the results of your recommendation.

  a) Enter a contact's email address in the **Contact Reference** box.
  b) Enter a product ID in the **Product Reference** box.

  If you have set criteria on the **Reference Products** tab you will not need to set a product ID.
c) Click **Preview**.

The **Preview** list can be switched between a list view or an card view. Each view provides a slightly different overview of the products. Click on any product name to see the complete details for the product. Here you can see the number and percentage of products that matched your recommendation.

If you update your recommendation with new criteria or priority settings then return to the **Preview** tab you will see these updates reflected in the recommendations on this page.

**19. Optional:** If you are finished building the recommendation, click **Publish Draft** to make the recommendation available for use.

You do not have to click **Publish Draft** to save your recommendation.

**Related Topics**

- Webinar: Ask the Experts... about Recommendations
- Premium: Predictive Models
- Webinar: Ask the Experts... about Recommendations
- Premium: Getting the Most From Your Product Catalog

**Publish A Recommendation**

You must publish a recommendation before you can use it to populate product data into your messages.

A recommendation can have both a draft and published version. When you create a recommendation, the changes you make are automatically saved as a draft version of the recommendation. After you click the **Publish Draft** button, a published version of the recommendation is created. If you edit a published recommendation, a new draft of the recommendation is created but the published version of the recommendation will continue to exist until you overwrite it with the new draft version.

**Note:** You can only have one draft and one published version of a recommendation at a time.

Any changes you make to a draft are only applied to the draft until you click the **Publish Draft** button and update the published version of the recommendation. This allows you to make changes to a recommendation without affecting the published recommendation that you may be actively using.

To publish a recommendation:

1. In Recommendations, navigate to the **Recommendations** page by clicking the **home** icon.
2. Locate the recommendation in the list of recommendations. You can
   - Search for the recommendation name by typing it into the search box.
   - Filter for recommendation status by selecting a status from the status list.
   - Filter for recommendation type by selecting a type from the type list.
3. Click on the recommendation name to open it.
4. Click **Publish Draft**.
   A confirmation window is displayed.
5. Click **Publish**.
   The recommendation is published and available for use.

**Activate Or Deactivate A Recommendation**

A recommendation must be active in order for you to be able to use it. When you publish a recommendation it is automatically made active.

This means it can be used in your marketing campaigns. Sometimes you might want to deactivate a recommendation so it cannot be used. You can see whether or not a recommendation is active from the Recommendations Home page.

To activate or deactivate a recommendation:

1. In Recommendations, navigate to the **Recommendations** page by clicking the **home** icon.
2. Locate the recommendation in the list of recommendations. You can
• Search for the recommendation name by typing it into the search box.
• Filter for recommendation status by selecting a status from the status list.
• Filter for recommendation type by selecting a type from the type list.

3. Click on the Active/Inactive toggle for the recommendation to activate or deactivate it.

Only published recommendations have a toggle.

4. If you are deactivated a recommendation, a warning will appear. Click Yes to continue the deactivation process.

**Use A Recommendations Template**

Bronto provides templates you can use to build recommendations.

Recommendations templates are designed to save you time by targeting common recommendation areas. Recommendations Standard templates cover situations like products currently on sale, products with the highest or lowest inventory, top rated products, and new arrivals. Recommendations Premium templates cover all of these as well as behavior-based situations. Behavior-based situations include things like contacts who browsed a product typically buy this other product, contacts who bought a product a year ago are typically buying these products now, contacts usually buy this set of products together, and top-rated products in the same category as another product.

Each template can be used as is or can be customized in order to further refine its recommendations.

The name of a template reflects the purpose the template is designed to serve. You can view a template's settings by going to the Recommendations Home page, clicking the Templates tab, then clicking the view icon for the template you want to view. If the template uses any product fields that your account does not have you will see a red triangle to the right of the setting.

To create a recommendation using a template:

1. In Recommendations, navigate to the Recommendations page by clicking the house icon.

2. Click Templates.

   The template list is displayed.

3. Locate the template you want to use and click the copy button for that template.

4. Enter a name for your recommendation in the Label box.
   The name can only contain alphanumeric characters and spaces.

5. If desired, enter a brief description for the recommendation in the Description box.

6. Click Copy Template.

   The copy of the recommendation is open with the General Settings tab displayed. All settings that are included with the template are already set.

7. Click Preview Results to see the list of recommendations.

8. If you
   • Are happy with your results and do not wish to make any changes to the template click Publish Draft to make the recommendation available for use.
   • Want to tweak your recommendation results, use the steps outlined in Create A Standard Recommendation on page 1419 or Create A Premium Recommendation on page 1423 to make adjustments.

9. Optional: If you are finished building your recommendation, click Publish Draft to make the recommendation available for use.

   You do not have to click Publish Draft to save your recommendation.

**Recommendation Messages**

After you have built a recommendation you can use it to dynamically add products from its results to an email.

When you use recommendations to populate product data into messages, you are not including specific products from a recommendation in the message. Instead, you are including placeholders that will be replaced with real product data based on what the recommendation results are at the time the message is sent.
When you add multiple Premium Recommendations to a message a customer will only see results for the first 3 Rec Loops (that have results). We don't limit the number of Rec Loops that can be included in the message to support adding different Rec Loops when working with dynamic content.

**Email Message Editor**

In the email message editor recommendations are added to messages using the Rec Loop element. If you created a premium recommendation that relies on a reference product, you will need to include at least one product or p in your message that the recommendation can reference in order for it to build results. Typically, if you use a predictive model and/or have set Related Products Criteria you will need a reference product. The contact the message is sent to will be used as the reference contact. To add a recommendation to an email message editor message:

1. If necessary, add a reference product to your message using product tags.

   Standard recommendations do not require a reference product. A premium recommendation may or may not require a reference product, depending on your settings for the recommendation. An easy way to tell if you need a reference product in your message is to preview the premium recommendation you plan to use. If the preview asks for a product reference before it can return results, then you need to supply a reference product in your message.

   If you use parent and variant products, the recommendation will never recommend a product that is from the same variant family as the reference product.

2. Drag the Rec Loop into a single-column container on the canvas.

3. In the Rec Loop palette:
   a. Enter a Loop Name.
      
      The loop name must be alphanumeric.
   b. Select the recommendation you want to use from the Recommendation List.
   c. Enter the recommendation number you want this list of recommendations to start with in the Starting Point box.
      
      Typically your starting point will be 1, but if you plan on including multiple loops using the same recommendation in your message, you may want to start with a different number in order to avoid duplicate recommendations.

4. Enter the number of product recommendations you want to include in the message in the # of Results box.

   For standard recommendations you can include up to 100 products. For premium you can include up to 20.

5. Enter the number of products you want to appear in each recommendation row in the Iterations Per Row box.

   The combination of the # of Results and Iterations Per Row will inform the design of your message. For example, if you set both to 3 you will have a single row of content but if you select 9 results and 3 iterations, you will have a block of content. Which is better depends on your audience and the purpose for the message.

   **Note:** Iterations Per Row only works correctly when all of the Recommendation Loop information is in 1 single-column container, including the Begin Rec Loop and End Rec Loop tags. For advanced styling for recommendation messages, you can use the methods in Advanced Styling For Browse Recovery Messages on page 1475.

6. Only if you set Use Request Time Criteria enter the value you want to use for this message in the Request Time Criteria box.

   - For operators Equals, Does Not Equal, Greater Than, Greater Than or Equal, Less Than, Less Than or Equal enter the value. For example, Female.
   - For operators In, Not In, Contains, Does Not Contain enter the value enclosed in quotes. For example, "Female". You can include multiple values by offsetting them with a comma.
   - For operator Between the values must be entered as a comma separated list. For example, 10,20

   If a change is made to the Use Request Time Criteria setting in the recommendation after you have configured Request Time Criteria in the message, the options you set here will be deleted. This is to prevent email from being sent with the wrong content.

7. Click Done.
8. Add product tags to the loop:

   The elements/product tags you add to the Rec Loop will represent the information about the product that is displayed in the email.

   a. Drag an element into the loop.

      For example, if you want to add an image, drag the Image element between the opening and closing loops tags.

   b. Add a product tag to the element.

      The Insert menu can be used to add product tags to elements. For more information see Add Tags Using The Message Editor on page 67. When the product tag is added to the loop it will have a syntax similar to `%$product.(?).title%`. Do not change the default syntax or the recommendation will not populate properly.

   c. Design the element.

      Design options vary from element to element. Remember, you are only designing the appearance of the product information. For example, the color of a button or size of the description text. The number of products and products per row are determined by your loop settings. Keep the placement of multiple products in a row in mind as you design your elements.

   d. Continue to add elements and product tags until you have added each product field you want represented for a recommendation.

      You only need to add each product field (element) once per loop in order for it to be present for all product recommendations.

**HTML Messages**

Including a recommendation in an HTML message requires hard-coding a recommendation loop in your message. You cannot use the WYSIWYG editor to add a recommendation loop to an HTML message.

The loop should be included within a table that is wrapped in a dynamic code block. For example:

```html
{dynamic_code}
<table>
{app_loop tag="$app.rec.recloop1.productIds" recId="recommendation_id" start="starting_point" rows="number_of_results"}
{if "%%$app.rec.recloop1.productIds._loopIndex%%" mod iterations_per_row eq 1}{literal}<tr>{/literal} {/if}
<td>
%%$product.($app.rec.recloop1.productIds).title%%
</td>
{if "%%$app.rec.recloop1.productIds._loopIndex%%" mod iterations_per_row eq 0 OR "%%$app.rec.recloop1.productIds._loopIndex%%" eq "%%$app.rec.recloop1.productIds._count%%"}{literal}</tr>{/literal} {/if}
{/app_loop}
</table>
{/dynamic_code}
```

In the example above all of the content required in the email message editor Rec Loop editor are represented as attributes of the app_loop tag. Anything in italics needs to be replaces with real content:

- **recommendation_id** is the name of the recommendation you want to use.
- **starting_point** is the recommendation number you want this list of recommendations to start. Typically your starting point will be 1, but if you plan on including multiple loops using the same recommendation in your message, you may want to start with a different number in order to avoid duplicate recommendations.
• **number_of_results** is the number of product recommendations you want to include in the message. For standard recommendations you can include up to 100 products. For premium you can include up to 20.

• **iterations_per_row** is the number of products you want to appear in each recommendation row.

• **recloop** is a variable that must be unique for each recommendation loop in a message. So if you have three recommendations this could be recloop1, recloop2, and recloop3.

If your recommendation includes the **Use Request Time Criteria** parameter, you will need to add `params=[XXXX]` to the `app_loop` tag in the rec loop code in order to pass in the values you want to use. The `XXXX` portion will vary based on the type of operator you specify:

• For operators Equals, Does Not Equal, Greater Than, Greater Than or Equal, Less Than, Less Than or Equal: `params=[field:value]`. For example, `params=[Gender:Male]`

• For operators In, Not In, Contains, Does Not Contain: `params=[field:"value"]`. For example, `params=[Gender:"Male"]` You can include multiple values by offsetting them with a comma. For example, `params=[Gender:"Male","Female"]`

• For operator Between: `params=[quantity_lower:value BETWEEN quantity_upper:value]`. For example, `params=[quantity_lower:10 BETWEEN quantity_upper:20]`

Additionally, the product tags between the `<td></td>` tags are just an example of what product tags you might want to include here. You should include the product tags that represent the product data you want to include for each recommendation.

**Note:** When you save the message, the code you entered will be temporarily replaced as the message is saved. This is Bronto converting the code for our database. After the message is saved the code will return to what you entered.

### Sending Recommendation Messages

Recommendation messages are scheduled the same way you send any other message. We recommend sending a test message so you can see the design and overall effectiveness of the message with its recommendations before sending it to your contacts. This way you can tweak your Rec Loop settings, or recommendations criteria, etc. so you know you're sending the best possible recommendations.

We also recommend using A/B Split testing as a way to compare the effectiveness of recommendation messages. For example you could compare a message that uses recommendations to a message that have specific products included in them. Or compare a recommendation message to a message that includes links to your site instead of using products. For more information see A/B Split Tests on page 321. You can also A/B split test in workflows by using the Random Filter node.

**Related Topics**

*Add Tags Using The Message Editor* on page 67

With the new message editor you can quickly add field, special, content, RFM, product, and cart/order tags to your messages using the **Insert** menu. You also have the option of adding tags to the subject line of your message using the drop down arrow to the right of the subject line.

### Migrate Predictor Tags To Recommendation Loops

The Recommendations app has simplified the process of using product recommendations in messages. Any Predictor tags that were added to messages before we released Recommendations will need to be updated to use the new Recommendation loop format.

The process for updating Predictor tags to Recommendation loops is slightly different depending on which email editor you created the message with. We recommend making a copy of a message and editing the copy. It will allow you to compare the new message to the old message and gives you a way to easily revert if there are any issues with your changes.
Email Message Editor

In the email message editor recommendations are added to messages using the Rec Loop element. To replace the existing Predictor tag implementation, you will need to add a Rec Loop to your message, move the existing Predictor tags into the loop, and then update the tag syntax.

1. Drag the **Rec Loop** into a single-column container on the canvas.
2. In the Rec Loop palette:
   a. Enter a **Loop Name**.
      The loop name must be alphanumeric.
   b. Select the recommendation you were already using from the **Recommendation List**.
   c. Enter the recommendation number you want this list of recommendations to start with in the **Starting Point** box.
      Typically your starting point will be 1, but if you plan on including multiple loops using the same recommendation in your message, you may want to start with a different number in order to avoid duplicate recommendations.
3. Enter the number of product recommendations you have included in the message in the **# of Results** box.
   For standard recommendations you can include up to 100 products. For premium you can include up to 20.
4. Enter the number of products you want to appear in each recommendation row in the **Iterations Per Row** box.
   The combination of the **# of Results** and **Iterations Per Row** will inform the design of your message. For example, if you set both to 3 you will have a single row of content but if you select 9 results and 3 iterations, you will have a block of content. Which is better depends on your audience and the purpose for the message.
5. Click **Done** to close the Rec Loop design palette.
6. Move one of the Predictor tag blocks into the loop.
   To move the Predictor tag block, mouse over it and click and hold the **Move** button. Then drag the block into the loop.
   The elements/product tags that are added to the Rec Loop will represent the information about the product that is displayed in the email. Because you are replacing tags with a loop, you only need to include one tag for each type of product data you want to include in the message.
7. Update the placeholders in the tags to (?).
   For example, if your product tag was %%%product.ytee.price%% it should be updated to %%%product.(?).price%%. Because the target recommendation is specified when the Rec Loop is configured, there is no need to create placeholders and map them to a recommendation. Instead, always use (?) so Bronto knows this is a recommendation tag.
   Make sure you remember to update the placeholder in URLs also.
8. If necessary, fix any custom CSS you used for the tags so that it will be appropriately applied to the Rec Loop contents.
9. Delete all of the old Predictor tags that you didn't copy into the new Rec Loop.
10. Delete the now empty containers that were used for the Predictor tags.
11. Save the message and send a test message to yourself.
   This will allow you to make sure the formatting and design are correct.

**HTML And WYSIWYG Messages**

In an HTML message you will need to update the existing code to use the proper recommendation loop format. To do this:

1. Add the recommendation loop opening tag before the existing `<table>` tag [that your current Predictor tags are in].
   The recommendation loop tag needs to contain certain data. It should look similar to

   ```html
   {app_loop tag="$app.rec.recloop1.productIds" recId="recommendation_id"
   start="starting_point" rows="number_of_results"}
   ```

   where anything in bold needs to be replaces with real content. This includes:
   - `recommendation_id` is the name of the recommendation you want to use.
   - `starting_point` is the recommendation number you want this list of recommendations to start. Typically your starting point will be 1, but if you plan on including multiple loops using the same recommendation in your message, you may want to start with a different number in order to avoid duplicate recommendations.
   - `number_of_results` is the number of product recommendations you want to include in the message. For standard recommendations you can include up to 100 products. For premium you can include up to 20.
   - `iterations_per_row` is the number of products you want to appear in each recommendation row.

2. Add the recommendation loop closing tag after the table close tag.
   This is simply `{/app_loop}`.

3. Remove all but one of the old Predictor code blocks.
   Loops only need each tag to be represented once.

4. Update the placeholders in the remaining tags to `(?)`.

   For example, if your product tag was `%%$product.ytee.price%%` it should be updated to `%%$product. (?) . price%%`. Because the target recommendation is specified when the Rec Loop is configured, there is no need to create placeholders and map them to a recommendation. Instead, always use `(?) ` so Bronto knows this is a recommendation tag.

5. As necessary, update the code in the table so that the message will be properly formatted.

6. Save the message and send a test message to yourself.
   This will allow you to make sure the formatting and design are correct.

**Recommendations Reports**

Recommendations reports can be used to view information about your recommendations.

Currently, there are no additional reports that specifically demonstrate the effectiveness of recommendations in your messages. However, you can use the current Message, Delivery, and Delivery Group reports to see open, click, conversion, revenue and contact loss rates for recommendation messages. You can also use this data to compare these metrics to your overall delivery metrics.

**Effectiveness Report**

This report shows the effectiveness of each recommendation in terms of usage and results produced. The metrics displayed at the top of the report page include totals, or averages, across all of your recommendations.
If you have the Recommendations Web app, you will see metrics for both email and web effectiveness. These metrics can include recommendations that were previously used but have since been deleted and therefore don't show up in the grid.

**Table 34: Effectiveness Metrics**

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Contacts Sent</td>
<td>Total number of contacts who have received a recommendation.</td>
</tr>
<tr>
<td>Total Web Views</td>
<td>Recommendations Web only. Total number of times recommendation blocks have been viewed on your site.</td>
</tr>
<tr>
<td>Average Products</td>
<td>Average number of products produced from all recommendation requests. This number reflects the total number of products that met the recommendation criteria, not the number of products requested from the recommendations. <strong>Note:</strong> If you have Recommendations Web you will see this metric twice. Once for email and once for web.</td>
</tr>
<tr>
<td>% Fulfilled</td>
<td>Percentage of requests where the primary recommendation returned the number of results requested. <strong>Note:</strong> If you have Recommendations Web you will see this metric twice. Once for email and once for web.</td>
</tr>
<tr>
<td>% Backup Used</td>
<td>Percentage of requests where the primary recommendation requested returned less than the number of products requested and the backup recommendation was used. <strong>Note:</strong> If you have Recommendations Web you will see this metric twice. Once for email and once for web.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Description</th>
</tr>
</thead>
</table>
| Email              | Total Contacts Sent: 292  
|                    | Average Products: 45.0  
|                    | % Fulfilled: 66.4 %  
|                    | % Backup Used: 4.5 %  
|                    | % Default Used: 11.3 %  |
| Web                | Total Contacts Sent: 5,826  
|                    | Average Products: 17.5  
|                    | % Fulfilled: 54.2 %  
|                    | % Backup Used: 0.0 %  
|                    | % Default Used: 28.6 %  |
### Apps

| Statistic               | Description                                                                                                                                                                                                                                                                                                                                 |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------**************************************************************************|
| % Default Used          | Percentage of requests where the primary and backup recommendations requested returned less than the number of products requested and the default recommendation was used.                                                                                      |
|                         | **Note:** If you have Recommendations Web you will see this metric twice. Once for email and once for web.                                                                                                                                                                                                                                     |

In the grid is a list of your published recommendations and the effectiveness statistics related to each one. You can search the grid by recommendation name and filter the based on recommendation status.

| Statistic               | Description                                                                                                                                                                                                                                                                                                                                 |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------**************************************************************************|
| Name                    | Name of the recommendation                                                                                                                                                                                                                                                                                                                                                                               |
| Status                  | Current status of the recommendations; either Active or Inactive                                                                                                                                                                                                                                                                                                                                           |
| Recommendation Type     | Indicates whether it is a standard or premium recommendation.                                                                                                                                                                                                                                                                                                                                            |
| Last Executed           | When the recommendation was last used                                                                                                                                                                                                                                                                                                                                                                     |
| Counts Since            | Date that Recommendations started recording data for the recommendation; this is typically the date the recommendation was enabled                                                                                                                                                                                                             |
| Contacts Sent - Email   | Number of contacts who have been sent the message                                                                                                                                                                                                                                                                                                                                                         |
| Contacts Sent - Web     | Recommendations Web only. Total number of times the recommendation has been requested by your website.                                                                                                                                                                                                                                                                                                  |
| Average Products        | Average number of products produced from all recommendation requests. This number reflects the total number of products that met the recommendation criteria, not the number of products requested from the recommendations.                                                                                           |
|                         | **Note:** If you have Recommendations Web you will see this metric twice. Once for email and once for web.                                                                                                                                                                                                                                                                                                    |
| % Fulfilled             | Percentage of requests where the primary recommendation returned the number of results requested.                                                                                                                                                                                                                                                                                                      |
|                         | **Note:** If you have Recommendations Web you will see this metric twice. Once for email and once for web.                                                                                                                                                                                                                                                                                                    |
| % Backup Used           | Percentage of requests where the primary recommendation requested returned less than the number of products requested and the backup recommendation was used.                                                                                                                                                                                                                                         |
|                         | **Note:** If you have Recommendations Web you will see this metric twice. Once for email and once for web.                                                                                                                                                                                                                                                                                                    |
### Published Settings Report

This report provides an at-a-glance look into the settings for your published recommendations. This report lists every recommendation you have published and the settings for the published version of each. It does not include criteria or priority settings, but you can view the full details for any of these recommendations by clicking on the recommendation name.

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the recommendation</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the recommendations; either Active or Inactive</td>
</tr>
<tr>
<td>Recommendation Type</td>
<td>Indicates whether it is a standard or premium recommendation.</td>
</tr>
<tr>
<td>Uses Backup</td>
<td>Whether or not the recommendation uses a backup</td>
</tr>
<tr>
<td>Uses Default</td>
<td>Whether or not the recommendation uses the default recommendation for your account</td>
</tr>
<tr>
<td>Apply Randomness</td>
<td>Whether or not the recommendation uses randomness</td>
</tr>
<tr>
<td>Restrict Parent/Variation Results</td>
<td>How the recommendation manages variant products in the results</td>
</tr>
<tr>
<td></td>
<td>• Parent Only - Only the parent products are included</td>
</tr>
<tr>
<td></td>
<td>• One Variation Only - Only one variant product, that best matches the recommendations criteria and priorities, is included in recommendation results</td>
</tr>
<tr>
<td></td>
<td>• Multiple Variations Only - The parent product will not be included in the recommendation results</td>
</tr>
<tr>
<td></td>
<td>• Parent And Multiple Variants - The best matches for the recommendations criteria and priorities are included</td>
</tr>
<tr>
<td>Uses Inventory Minimums</td>
<td>Whether or not the recommendation uses inventory minimums</td>
</tr>
<tr>
<td>Uses Global Criteria</td>
<td>Whether or not the recommendation uses the global criteria for your account</td>
</tr>
<tr>
<td>Used As Backup</td>
<td>Whether or not the recommendation is used as a backup for another recommendation</td>
</tr>
</tbody>
</table>

### Top Recommended Products

This report shows which of the products in your catalog have been recommended most frequently. This report provides a list of the top 100 products that have been included in the recommendations you have built. The report
shows the number of times each product has been recommended, how frequently it appears in all recommendations, and the last time it was recommended.

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Image</td>
<td>Main image for the product; pulled from your product catalog</td>
</tr>
<tr>
<td>Title</td>
<td>Title for the product; pulled from your product catalog</td>
</tr>
<tr>
<td>Product ID</td>
<td>ID, or SKU, for the product; pulled from your product catalog</td>
</tr>
<tr>
<td>Recommendation Count</td>
<td>Number of times the product has appeared in the results of a recommendation that was used in a delivery</td>
</tr>
<tr>
<td>Recipient Count</td>
<td>Number of contacts who have received this product in a recommendation</td>
</tr>
<tr>
<td>Frequency</td>
<td>Percentage of all recommendation requests where the product appeared in the recommendation</td>
</tr>
<tr>
<td>Last Recommended</td>
<td>Last time the product appeared in the results of a recommendation</td>
</tr>
</tbody>
</table>

Recommendations Web

Recommendations Web allows you to display your Bronto recommendations on your website as recommendation blocks.

Important: If you do not have the Recommendations Web app and would like information about purchasing it, see Bronto's App Center or contact your account manager.

Recommendations Web is a paid for app that can be accessed from the Tables menu. It can be used to place product recommendations your website using the recommendations built with either Recommendations Standard or Premium. This extends the use of Recommendations Standard and Recommendations Premium from email to your website.

When you have the app, you will see + Web after either Recommendations Standard or Recommendations Premium in the Tables > Recommendations navigation path.

With Recommendations Web you can:

- design content blocks for your recommendations
- identify pages you want to surface recommendations on
- use basic coding to display recommendations on your website

To make this integration easy, once purchased, Recommendations Web can be accessed from within the Recommendations app by clicking the globe icon.
Prerequisites

Recommendations Web has all of the same prerequisites as your version of Recommendations. If you're new to Recommendations, see Before You Can Begin on page 1411. It's particularly important you have a current product catalog that contains Title, Image URL, and Product URL product fields. You will use these fields when building recommendation blocks.

Configuration and Implementation

Making recommendation blocks appear on your site requires completing these tasks:

1. Add the Web Integration Manager script to your site. This allows Bronto to collect and pass data necessary to providing targeted recommendation data. See Add The Web Integration Manager Code To Your Site on page 1356 for more information.
2. Add an additional script to the bottom of each page.
3. If you have Recommendations Premium, you will need to configure selectors on your page to get the Product ID (for product pages) and Email Address and/or Contact EID. See Capture Browse Data on page 1463 for more information.
   
   Note: If you are already use Browse Recovery or Recommendations Premium, your selectors should be configured already and you can skip this.
4. Place bronto-rec div tags in the code on pages where you want the recommendation to be displayed. See Use Div Tags To Place Recommendations Within A Page on page 1440 for more information.
5. If necessary, add page identifiers to your code so you can use them to map recommendations. If your site has clearly defined URL parameters, these can be used as identifiers also. See Add A Page Identifier Script To Your Site on page 1441 for more information.
6. Use the Identifiers tab to associate page identifiers with recommendations and configure the settings for each recommendation. See Configure Identifiers For Recommendations Web on page 1455 for more information.

Design

Recommendations Web provides a drag and drop editor, similar to the email message editor, that you can use to design your recommendation blocks. A recommendation block design is called a layout. When you add a recommendation to an identifier, you will select a layout and this will determine how your products are displayed. See Recommendations Web Layouts on page 1444 for more information.

Bronto provides layout templates you can copy and use as a design shortcut. You can also create completely new layouts from scratch.

Settings

Recommendations Web provides a Settings page you can use to configure default values for identifiers and to define how the recommendations should behave on your website. See Recommendations Web Settings on page 1458 for more information.
**Test And Publish**

After you create an identifier in Bronto you will need to publish it before it can be used on your site. This lets you make changes in the app without those changes being automatically displayed on your site. You also have the option of using Recommendations Web in test mode. Test mode will let you promote changes to a staging site for testing before publishing to your production site. See Recommendations Web Test Mode on page 1460 for more information.

**Recommendations Web Site Configuration**

Recommendations Web requires that different blocks of code are added to your site in order for it to be able to work properly.

These code blocks fall into three categories:

- Code that allows Bronto to exchange data.
- Code that tells Bronto where to place the recommendation on the page.
- Code that provides an identifier the app can use to match recommendations to pages.

The first two types of code are required. The third code is only necessary when your site doesn't have unique page identifiers that can be used instead.

**Data Exchange**

In order to exchange data with Recommendations Web, you need to:

1. **Add The Web Integration Manager Code To Your Site** on page 1356. This code is used to capture contact browsing activity including the products being viewed.

2. Add

   ```html
   <script type="text/javascript" defer="defer"> 
   bronto("webRecs:render"); 
   </script>
   ```

   as the last piece of code on your website pages.

   With this code in place, each page will look to capture the contact browsing, the product being viewed and any other pertinent information provided on the page, and will make a request for results of the recommendation(s) associated to the Identifier matched to that page, based on your Identifier settings within the Recommendations app.

**Recommendation Placement**

You need to place `bronto-rec` div tags on your website pages so Bronto knows where on a page to place each recommendation block. See **Use Div Tags To Place Recommendations Within A Page** on page 1440 for complete details on how to do this.

**Identifier Code**

Identifiers are values from your website that can be used to identify a page or a set of pages. Typically part of a URL path can be used as an identifier. However, when this isn't possible you can add code to your site's pages that will create an identifier Bronto can use. See **Add A Page Identifier Script To Your Site** on page 1441 for complete details on how to do this.

**Use Div Tags To Place Recommendations Within A Page**

You need to place `bronto-rec` div tags on your website pages so Bronto knows where on a page to place each recommendation block.

When an identifier is matched to a page on your site, Recommendations Web will look for a set of div tags that have an id that matches `bronto-recX`. This is where the app places the recommendation results. `X` is a variable that should be replaced by a number. For example `bronto-rec1,bronto-rec2, etc. When you have multiple
recommendations for an identifier, we'll use the recommendation ranking and the number provided in the div id to place recommendations into code blocks.

For example, you have an identifier with three recommendations. The div with id="bronto-rec1" will be populated with products from the first recommendation and the div with id="bronto-rec2" will be populated with products from the second recommendation. If you do not have a div with id="bronto-rec3" then the third recommendation won't be used.

In addition to having the proper bronto-rec id, you will need to style your div tag so it is displayed in the location on the page you want it to appear. You should also include header text if you want it to be displayed. All styling of the recommendation block itself is done within the Recommendations Web app.

Tip: Occasionally a recommendation might not return a result. To ensure that a div tag associated to a recommendation without results is not displayed, set div tags to be hidden by default. When a recommendation does have results, the Bronto code will update the div tag to visible when it renders the results.

We've provided some code examples you can use as a baseline.

**Center Aligned Code Example**

```html
<div id="bronto-rec1" style="margin-left: auto; margin-right: auto; display: none;"> We Thought You Might Like </div>

<div id="bronto-rec2" style="margin-left: auto; margin-right: auto; display: none;"> People Who Bought This Also Bought </div>
```

**Left Aligned Code Example**

```html
<div id="bronto-rec1" style="margin-left: 0; margin-right: auto; display: none;"> We Thought You Might Like </div>
```

**Right Aligned Code Example**

```html
<div id="bronto-rec1" style="margin-left: auto; margin-right: 0; display: none;"> We Thought You Might Like </div>
```

**Add A Page Identifier Script To Your Site**

If pages on your site do not have unique identifiers in their URL paths, you can use a page identifier variable to create identifiers that Recommendations Web can use.

Recommendations Web uses a unique page identifier in order to know what page to display a recommendation block on. Typically you will be able to use a parameter in a page's URL. However, if your site doesn't support this, you can add a brontoIdentifier script to place identifiers on pages.

The script should look similar to

```html
<script type="text/javascript">
var brontoIdentifier = {value: "identifier"};
</script>
```
where \textit{identifier} is replaced with the identifier you want to use for the page.

So if you wanted to place recommendation blocks on all pages that have children's products your code would look like

\begin{verbatim}
<script type="text/javascript">
var brontoIdentifier = {value: "kids"};
</script>
\end{verbatim}

and the identifier you would map in Recommendations Web would be \textit{kids}.

\textbf{Recommendations Web Reference Products}

When building a premium recommendation, you decide whether a reference product should be based on a contact's history by enabling toggles on the \textbf{Reference Products} tab. If you do not enable these toggles, Recommendations Web assumes reference products will be provided with the request and needs code it can use to identify these products.

If the recommendation is on a product page, the Web Integration Manager script collects the product's ID and passes it to Bronto. Recommendations Web can use this as the reference product and if this is the only reference product you want to use, no additional configuration is required. If you want to use other reference products, for example the products in a contact’s cart or wishlist, you will need to add code that passes those product IDs.

You can pass up to 10 product IDs in one of three different ways. We've provided code examples you can use to build your own.

\textbf{Comma-Separated List of Product IDs Script}

In this example, the numbers in quotes are examples of product IDs. You will need to supply your own product IDs, typically by using code to dynamically pull these IDs from the current cart object.

\begin{verbatim}
<script type="text/javascript">
var referenceProducts = ["123", "456"];
bronto("webRecs:setReferenceProducts", referenceProducts);
</script>
\end{verbatim}

\textbf{JSON Object Containing Product IDs Script}

This example shows how you might construct this if you already use a JSON object on your site.

\begin{verbatim}
<script type="text/javascript">
brontoCart = {
  "lineItems": [
    {"sku": "123", "name": "Shirt", "description": "A description of a shirt"},
    {"sku": "456", "name": "Pants", "description": "A description of some pants"}]

bronto("WebRecs:setReferenceJsonProducts", brontoCart.lineItems);
</script>
\end{verbatim}

\textbf{JSON Object Comma-Separated List of Product IDs Script}

There are two ways valid ways to construct this; we've provide an example for both. You only need to use one of these formats.

\begin{verbatim}
<script type="text/javascript">
var jsonProducts = [{sku: "123"}, {sku: "456"}]
bronto("webRecs:setReferenceJsonProducts", jsonProducts);
</script>
\end{verbatim}
Recommendations Web Request Time Criteria

Request time criteria lets you build generalized recommendations that can be customized based on the context its used in. For Recommendations Web, this means adding a script to pages where you want to use the recommendation that tells the recommendation what to use for customization.

For example, you could make a **Top Rated Products** recommendation that uses the request time criteria **Product Category Contains**. Next you could add a scripts on your site's category pages that identifies what request time criteria to use. For example, your request time criteria for pages in the shoe category would be **shoes** and your request time criteria for accessories pages would be **accessories**. This allows you to use the same recommendation for all of these pages, but customize the results to the category being viewed.

The code for using product category shoes would look like this:

```javascript
<bronto("webRecs.setParameter", {name: "product_category", value: "\"shoes\""});
</script>
```

The name and value provided must match a product field name and a value stored for that product field in your product catalog. It also must match the request time criteria you provided in your recommendation. Since text fields require the use of quoted values, \ is used in front of the start and end quotes around clothing so the quotes can be recognized. The code for accessories would look like:

```javascript
<bronto("webRecs.setParameter", {name: "product_category", value: "\"accessories\""});
</script>
```

You can use any product field in your catalog for request time criteria. Just supply the product field name after `name:` and the value you want to match after `value:`. For example, if your recommendation was using a **Request Time Criteria** of price greater than, your code would look similar to:

```javascript
<bronto("webRecs.setParameter", {name: "price", value: "10"});
</script>
```

If your identifier uses multiple recommendations with different **Request Time Criteria** fields, you can make multiple function calls on the page to set each value individually.

### Configure Recommendations Web for a Single Page App

You can implement Recommendations Web on a site built as a Single Page App (SPA), but it requires a little more planning and a few more steps.

With SPA sites, managing the life cycle of the Recommendations Web performance is the key to it functioning properly on the site. Code and data must load in the correct order for the solution to render properly on each page.

Specifically, when the site is initially loaded (or the browser is manually refreshed by the site visitor) AND after every subsequent dynamic reload of a page, the following steps must occur in this EXACT order:

1. Insert the **Bronto-specific div tags** on the page. Recommendation results are automatically rendered into HTML and appended to these div tags.
2. On all product pages, insert the **Product ID** value into the JS or CSS variable you have configured within Bronto.
3. Insert the page identifier value into the `brontoIdentifier JS variable`, if applicable. You do not need to do this if the URL is being used to identify the page.

4. Set the page's URL. You do not need to do this if the `brontoIdentifier` is being used to identify the page.

   Note: Steps 1-4 can occur in any order.

5. Load the **Web Integration Manager JS snippet**. This snippet will run all required scripts to produce recommendations on the page.

6. Call the `setReferenceProducts` or `setReferenceJsonProducts` function call, if applicable. This is needed if the recommendations for the page require reference products other than the page's product ID.

7. Call the `setParameter` function call, if applicable. This is needed if the recommendations for the page require Request Time Criteria values.

   Note: Steps 6 and 7 can occur in any order after step 5.

8. When the site initially loads (or the browser is manually refreshed by the site visitor), call the `Render` function to initiate the recommendation execution process.

9. When a site visitor triggers a new page load, call the `changeIdentifier` function.

   ```javascript
   <script type="text/javascript">
   bronto("webRecs:changeIdentifier");
   </script>
   ```

   This reruns the entire recommendations execution process including gathering new data points.

**Recommendations Web Layouts**

Layouts provide the design for recommendation blocks that are placed on your site.

You can design and preview layouts in Recommendations Web so you can see what your products will look like before you publish them to your site. Layouts only control the design within the recommendation block. The placement of your recommendation block is managed by code on your site. See **Use Div Tags To Place Recommendations Within A Page** on page 1440 for more information.

To design a layout:

2. Click the Recommendations Web icon.
3. Click the Layouts tab.
4. Either:
   - Copy a template to use as a design baseline, then edit the template copy.
   - Click **New Layout**, give the layout a name, and click **Create Layout**.
5. In the layout designer, use containers, elements, and layout design settings to create your layout.

   For more information about containers, elements, and settings, see the sections of help for each on this page.

   a. Drag a container or element onto the canvas.
   b. When you add an element, make sure the element uses the product field you want to be displayed in the block.
   c. Use the design settings to visually style your element.
6. Use the **Preview** button, located above the canvas, to see what your recommendation block will look like.

   When the preview first opens, it will display based on your site's default Product ID. You can edit this Product ID on the **Settings** tab. You can change the Product ID used for the preview by changing the **Product ID** and clicking **Refresh**.

   You can also use the HTML, located to the left of the preview button, to see the HTML used to generate the layout on your website. From the **HTML Code** window, you can copy the content in case you want to view it in some other editor. This can be helpful in identifying class names for use in your website’s CSS.

7. When you're done, save your changes.
Your account comes with a Bronto Predefined Layout. This is a basic layout that is initially configured as your default layout for your identifier recommendations. You can edit this layout or you can delete it if after you change your default layout to another layout on the Settings tab. We also provide template layouts that address many common recommendation block needs on the Templates tab. You can copy and use any template.

**Containers**

Containers are used to add rows to your design and can be between one and six columns. To add a container, simply click Containers, then drag a container from the palette onto the canvas.

You can add multiple containers to a single layout, stacking them on top of each other to create a customized layout. You can also apply a Minimum Height in the Container Settings to ensure enough space for the container’s contents to fit without pushing down the other containers. This is useful to ensure product content aligns across multiple products on your site.

Within each container, you can apply dynamic content to determine what to display. This works similarly to the use of Dynamic Content Rules for the Email Message Editor. To make a container dynamic:

1. Hover over the container and click the Dynamic button from the panel at the top of the container.

   This will open the Edit Dynamic Content Rules settings panel.

2. Build rules based on a product.

   For example, on a sale or on the value of a specific product field, such as the availability of a product. For each rule, you can use the canvas to design content to be displayed.

**Elements**

To use elements, simply drag an item from the palette to a container on the canvas. Then use the settings panel and design menu to add your content. Once on the palette, the element's settings panel can be used to provide the content and design for the element. The options available on the Content and Design tabs will vary from element to element.

Each element has a unique ID you can use to target it in the CSS. To find the CSS class ID for an element, open the element in the palette and scroll to the bottom of the Design tab. For example: .element-36789743892.
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Text | Adds text; this includes the ability to insert dynamic code and tags. | Within a text element, you can add product content directly from your product catalog. Within the element’s toolbar, use the dropdown box labelled **Insert Field** to find and select the product field you wish to display. If you have the Price and Sales Price fields mapped in your product catalog, you will also see two calculated fields available for **Sale Discount Amount** and **Sale Discount Percentage**. You can create hyperlinks on any of your content by highlighting that content and clicking the icon on the toolbar. Within the **Link Settings** window, enter the URL, or click the icon and select the **Product URL** or **Relative Product URL**. You can also configure text and numeric product fields with special formatting by highlighting the entire product field name, including the double curly braces before and after the field name, and then clicking on the **Pencil** icon in the toolbar. From here you can:  
  - Trim text fields to a maximum length.  
  - Specify thousands and decimal place symbols as well as the number of decimal places.  
  - Display numbers as symbols, such as for displaying ratings. You can also use the various toolbar items to format your content and the **Design** tab to format the entire element. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Image</td>
<td>Places an image in your layout.</td>
<td>Within an image element, you can specify a specific image and link URL or you can select it from your product catalog. To do so, click the + icon to the right of the text box to find and select the field you wish to use. If you are adding a product URL, you can use a <strong>Product URL</strong> (Example: <a href="http://www.mysite.com/product-A">www.mysite.com/product-A</a>) for the full path or a <strong>Relative Product URL</strong> (Example: /product-A) for the relative path. You can also use the Design tab to format the entire element. Images should always include a brief description in the Alt Text box so that text is displayed if the image cannot be.</td>
</tr>
<tr>
<td>Button</td>
<td>Adds a button.</td>
<td>Within a button element, you can specify the button’s text and a specific link URL or you can select it from your product catalog. To do so, click the + icon to the right of the text to find and select the field you wish to use. You can also use the Design tab to format the entire element.</td>
</tr>
<tr>
<td>Spacer</td>
<td>Allows you to specify the height of a container without adding other content to it.</td>
<td>The Spacer element can be used to increase or decrease the use of white space. The maximum spacer height is 100 (px, em, rem, mm, or vh). Even though you only add the Spacer element to a single box, an entire container is effected.</td>
</tr>
</tbody>
</table>

**Settings**

Within the settings tab, use the **Layout Design** to set up the basic design of the background, including the fixed width of the design. When displayed on your site, the design will maintain this width for individual products, but products will stack responsively. The height of the design will be based on the individual elements used.

You can also enter your **Custom CSS** for the elements in the design.

**Design Options**

This table describes the design options for containers, elements, and/or layout design.
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alignment</td>
<td>Controls the horizontal spacing of the element within the container.&lt;br&gt;When you apply an alignment to a container, it is applied to all of the elements in the container. You can only choose one of the alignment settings available in the list.&lt;br&gt;For more information about alignment, see <a href="http://www.w3schools.com/cssref/pr_text_text-align.asp">http://www.w3schools.com/cssref/pr_text_text-align.asp</a>.&lt;br&gt;&lt;br&gt;Note: When editing a Button element, alignment adjusts the alignment of the text on the button. If you want to align a button in relation to the position of the button in the container, then you should edit the alignment for the container from the Container Design menu or use padding to adjust the position of the button in relation to the container box.</td>
</tr>
<tr>
<td>Background Color</td>
<td>Applies the selected color to the container cell the element is in.&lt;br&gt;You can either select a color by clicking on the color picker, or you can enter the CSS color value if you know the exact color you want to use.&lt;br&gt;If you set the background color for an element, it will override any other background color settings you may have applied to a container or a layout. Except for buttons. Background color for a button will make the area within the button a specific color. To change the color of the space behind a button use Element Background Color.&lt;br&gt;For more information about background color see <a href="http://www.w3schools.com/cssref/pr_background-color.asp">http://www.w3schools.com/cssref/pr_background-color.asp</a>.</td>
</tr>
<tr>
<td>Border Color</td>
<td>Changes the color of a border around the element.&lt;br&gt;You can either select an option from the color picker, enter any generic color (blue, red, purple), or enter the HEX value for a color.&lt;br&gt;When you set a border color you must also set a border style in order for the border to be displayed.&lt;br&gt;When you assign a border color to an element, the border is applied to the perimeter of the element, not to the container box the element is in. So if you have more than one element in a container box only the element you applied the border color to will have the border.&lt;br&gt;Note: Due to some email client's limited ability to support complex borders, this value cannot be used with a border radius.</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Border Radius  | Adds a rounded border to a button. If you set a border radius any other border values you set will not be applied due to the limited ability of some email clients to support complex borders. If you decide, after setting a border radius, you'd rather use the other border options, set a border style and the border radius will be overwritten. Use either a px value or a % to change the shape of the button. If you enter multiple px values, then the button shape will be rounded differently on each corner:  
  • One value will round all of the corners equally. For example 2px  
  • Two values will round the left and right sides of the button. For example 2% 10%  
  • Four values will round each corner in relation to the other corners. For example 2px 10px 4px 20px  
For more information about the CSS properties for border radius see [http://www.w3schools.com/cssref/css3_pr_border-radius.asp](http://www.w3schools.com/cssref/css3_pr_border-radius.asp). Note: Due to some email client's limited ability to support complex borders, this value cannot be used with a border radius. |
<p>| Border Style   | Adds a border in the specified style around the element. You can select an option from the menu. The border style shown is what the border will look like. For more information see <a href="http://www.w3schools.com/cssref/pr_border-style.asp">http://www.w3schools.com/cssref/pr_border-style.asp</a>. If you want to change the color of the border, use the border color design option. If you want to change the width from the default use the border width design option. When you assign a border style to an element, the border is applied to the perimeter of the element, not to the container box the element is in. So if you have more than one element in a container box only the element you applied the border style to will have one. |</p>
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Border Width</td>
<td>Adjusts the width of the lines in a border. You should use this element if you want to use a variable border width or want to use a border to create a line between elements on the canvas (instead of a box). To use border width to create a line instead of a border, set the sides of the border you don't want to display to 0px. Border width overrides any width setting you have applied to the same element or container using the border option. You will only see the border width settings applied to your layout if the element or container also has border settings.</td>
</tr>
<tr>
<td></td>
<td>Note: Due to some email client's limited ability to support complex borders, this value cannot be used with a border radius.</td>
</tr>
<tr>
<td>Bulleted list</td>
<td>Adds bullets to your list items. You can choose from a disc bullet or a circle bullet. For information on numbered lists, see the Numbered Lists entry.</td>
</tr>
<tr>
<td>Column Width</td>
<td>Sets the width of a box in a container. Set custom column width for a container box by opening a container's settings and selecting either Equal Column Widths or Custom Column Widths from the Layout tab. If you select Custom Column Widths you can further edit each box width by either: • Sliding the bar for a container to the left or right • Entering a new number in the px box The total width of a container must equal 640 px. When you adjust one container box, the other container boxes will be adjusted in order to meet the 640 px requirement.</td>
</tr>
<tr>
<td>Element Background Color</td>
<td>Sets the color of the container box behind a button. This can be used to style the background color behind a button if you want only the container column behind a button to be a specific color. To set the color of the entire container a button is in, set the Background Color for the container.</td>
</tr>
<tr>
<td>Font Color</td>
<td>Sets the color used for text. You can either select a color by clicking on the color picker, or you can enter the CSS color value if you know the exact color you want to use. If you set the font color for an element, it will override any other font color settings you may have applied to a container or the layout. This means, if you make the font color of a Text element yellow, the text will be yellow, even if you have set the font color of the rest of the container to be green.</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Font Family</td>
<td>Specifies the type of font used for text. Fonts have been divided into three categories. In the <strong>Font Family</strong> list, the first set of fonts that appear are considered supported fonts. These fonts will display as designed in any situation a contact may open an email in. The second set of fonts, found under the <strong>Reduced Support</strong> heading, may not be supported in all situations. When you use one of these fonts it's possible a contact opening an email using a specific browser, email client, or mobile device might see a different font than the one you select. Generally, the font you chose will be replaced by another font in the same font family. The final set of fonts, found under the <strong>Limited Support</strong> heading, are generally not supported by most email clients or browsers. We do not recommend using these fonts. For more information about font family see <a href="http://www.w3schools.com/cssref/pr_font_font-family.asp">http://www.w3schools.com/cssref/pr_font_font-family.asp</a>.</td>
</tr>
<tr>
<td>Font Size</td>
<td>Sets the size of the text. While you can set the font size to a percentage or a general size (small, medium, etc.) we recommend you set the font size in px. The default font size is 16px.</td>
</tr>
<tr>
<td>Font Style</td>
<td>Specifies if the font is italic. Font style can either be italics or normal text. By default, text is set to normal.</td>
</tr>
<tr>
<td>Font Weight</td>
<td>Specifies if the font is bold. Font weight can be bold or normal text. By default, text is set to normal.</td>
</tr>
<tr>
<td>Height</td>
<td>Controls the amount of space that is used for a Spacer. Setting the height for the <strong>Spacer</strong> or <strong>Text</strong> element lets you control the amount of space between elements. Always use a px value for the height.</td>
</tr>
<tr>
<td>Line Height</td>
<td>Sets the distance between lines in text. By default, line height is set to normal but you can select other percentages in order to increase the line height. The higher the line height percentage is set, the greater the space there will be between lines of text in the element. You cannot apply line height at the container level or to a selection of text within a single element. If you have two <strong>Text</strong> elements in the same container cell, only the <strong>Text</strong> element you apply line height to will be effected by the setting.</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Letter Spacing  | Sets the amount of space between letters. You can set letter spacing using px or em.  
By default, letter spacing is set to 0. You have the option of either using a preset letter spacing (0px, 0.25px, 0.5px, 0.75px, 1px, 1.25px, 1.5px, 1.75px and 2px) or specifying your own letter spacing value.  
When you set letter spacing to a number larger than 0, it will increase the spread between letters. When you set letter spacing to a number smaller than 0 (Example: -0.25), letters will appear closer together. |
| Numbered list   | Adds numbers to your list items. You can choose from numbers or Roman numerals. For information on bulleted lists, see the [Bulleted List entry](#).                                                                                                                                                                                                                                                                  |
| Padding         | Controls the white space around the element.  
If you select a padding setting from the list, the padding is applied equally on all sides on the element. You can also type values into the box in order to apply different margin widths to each side of your element. For example, if you type 15px 5px then the top and the bottom of the element will have 15px of white space and the left and right space in the element will have a 5px of white space around it. |
| Subscript       | Sets the selected text below the line.  
For example, if you type H2O for water, you can put the 2 in a subscript and it will look like this: H$_2$O.                                                                                                                                                                                                                                                                                   |
| Superscript     | Sets the selected text above the line.  
For example, if you want to add the registered trademark symbol after your product name, you could put the symbol in a superscript and it would look like this: Product$^*$.                                                                                                                                                                                                                   |
| Text Alignment  | Sets the alignment for text at the layout level.  
You can set the text alignment for all text in a layout by going to Settings > Message Design. From here you can choose one of the following for text alignment:  
- left: the text will be aligned to the left edge of the element or container its in  
- center: the text will be centered in the element or container its in  
- right: the text will be aligned to the right edge of the element or container its in  
- justify: stretches the text so that each line has equal width  
If you set alignment for text at the container or element level, those settings will override the text alignment set at the layout level. |
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Decoration</td>
<td>Specifies if the font has an underline or strikethrough. By default, text decorations is set to normal.</td>
</tr>
</tbody>
</table>
| Width            | Sets the width of an element. The width can be set with  
|                  | • Percentages: sets the width in relation to the size of the container the element is in. So, if you set a button to have 100% width, it will completely fill the container box.  
|                  | • Px: sets the width to a specific size. If that size is larger than the container box, the container box size is automatically adjusted to accommodate the width setting. |

**Layouts Actions**

This table describes what you can manage layouts after they are built.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy A Layout</td>
<td>To copy an existing layout, go to the <strong>Layouts</strong> tab and click the <strong>Copy</strong> icon to the right of the layout name, then provide the new layout name to use. This feature is helpful if you want to create something very similar for a new layout, with only minor modifications.</td>
</tr>
<tr>
<td>Edit A Layout</td>
<td>To edit an existing layout, go to the <strong>Layouts</strong> tab and either click the layout name or click the <strong>Pencil</strong> icon to the right of the layout name. If only a Published version exists, this will create a draft version for you to edit. If a Published and Draft version both exist, you will be given a choice to discard the draft which will create a new draft for you to edit, edit the existing draft or view a read-only version of the published version.</td>
</tr>
<tr>
<td>Delete A Layout</td>
<td>To delete an existing layout, go to the <strong>Layouts</strong> tab and click the <strong>Delete</strong> icon to the right of the layout name. If the layout is currently in use by an identifier, you will see an alert informing you that you are not able to delete the layout until it is removed from use.</td>
</tr>
<tr>
<td>Preview A Layout</td>
<td>To preview an existing layout without opening it, go to the <strong>Layouts</strong> tab and click on the <strong>Preview</strong> icon to the right of the layout name. A window will open displaying a preview of the layout with the default preview product.</td>
</tr>
<tr>
<td>Publish A Layout</td>
<td>To publish an existing layout, go to the <strong>Layouts</strong> tab and click the <strong>Publish</strong> icon to the right of the layout name. This will make it available for use on your website, and if a previously published version of this layout exists, it will be replaced with this new version. This option is only available for layouts with a Draft version.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Use A Layout Template</td>
<td>The <strong>Templates</strong> tab displays a list of all template layouts available. From this tab, you can copy a template by clicking on the <strong>Copy</strong> icon to the right of the template name. Provide a new layout name and the template is immediately opened for editing as well as copied to the <strong>My Layouts</strong> tab. You can also preview a template by clicking on the <strong>Preview Layout</strong> icon to the right of the template name to see what the layout would look like for your default preview product. From that preview, you can also copy the template.</td>
</tr>
<tr>
<td>Save or Discard Draft Layouts</td>
<td>Layouts are auto-saved after every change you make so there is no need to proactively hit the <strong>Save Changes</strong> button, but it is there in case you feel the need to do so. Similarly, if you wish to leave the layout after making changes, you can just navigate away, but pressing the <strong>Save &amp; Close</strong> button will return you to the <strong>Recommendations Web dashboard</strong>. If you no longer want the draft, you can click <strong>Discard Draft</strong> to return to the <strong>Recommendations Web dashboard</strong>. If there is a published version of the layout, it will remain with no draft. If there is no published version, the layout will be completely deleted.</td>
</tr>
</tbody>
</table>

### Date Formatting in Layouts for Recommendations Web

You can format date fields in a text element in your Recommendations Web layouts.

You can add different date fields to a text element in your Recommendations Web layout. For example, you can add an **Available Date** field to show when an item is going to be available to purchase.

To add a date field to your layout:

1. Create a new layout or open an existing layout.
2. Add a **Text** element.
3. Choose a date field from the **Insert Field** list.
4. When you first add the date field, you will be able to format it. If you choose to format it later, highlight the date field and then click the pencil icon.
5. Type the date format you want to use.
6. Click **Save**.

For example:

- mmm d, yyyy (displays as Apr 25, 2018)
- dddd, mmmm d, yyyy (displays as Wednesday, April 25, 2018)
- mm/dd/yyyy (displays as 04/25/2018)

### Supported Date Formats

These are the supported date formats for date fields in Recommendations Web layouts.

<table>
<thead>
<tr>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>d</td>
<td>Day of the month as digits; no leading zero for single-digit days.</td>
</tr>
<tr>
<td>dd</td>
<td>Day of the month as digits; leading zero for single-digit days.</td>
</tr>
<tr>
<td>ddd</td>
<td>Day of the week as a three-letter abbreviation.</td>
</tr>
<tr>
<td>Format</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td>dddd</td>
<td>Day of the week as its full name.</td>
</tr>
<tr>
<td>m</td>
<td>Month as digits; no leading zero for single-digit months.</td>
</tr>
<tr>
<td>mm</td>
<td>Month as digits; leading zero for single-digit months.</td>
</tr>
<tr>
<td>mmm</td>
<td>Month as a three-letter abbreviation.</td>
</tr>
<tr>
<td>mmmm</td>
<td>Month as its full name.</td>
</tr>
<tr>
<td>yy</td>
<td>Year as last two digits; leading zero for years less than 10.</td>
</tr>
<tr>
<td>yyyy</td>
<td>Year represented by four digits.</td>
</tr>
<tr>
<td>h</td>
<td>Hours; no leading zero for single-digit hours (12-hour clock).</td>
</tr>
<tr>
<td>hh</td>
<td>Hours; leading zero for single-digit hours (12-hour clock).</td>
</tr>
<tr>
<td>H</td>
<td>Hours; no leading zero for single-digit hours (24-hour clock).</td>
</tr>
<tr>
<td>HH</td>
<td>Hours; leading zero for single-digit hours (24-hour clock).</td>
</tr>
<tr>
<td>M</td>
<td>Minutes; no leading zero for single-digit minutes.</td>
</tr>
<tr>
<td>MM</td>
<td>Minutes; leading zero for single-digit minutes.</td>
</tr>
<tr>
<td>N</td>
<td>ISO 8601 numeric representation of the day of the week.</td>
</tr>
<tr>
<td>o</td>
<td>GMT/UTC timezone offset, e.g. -0500 or +0230.</td>
</tr>
<tr>
<td>s</td>
<td>Seconds; no leading zero for single-digit seconds.</td>
</tr>
<tr>
<td>ss</td>
<td>Seconds; leading zero for single-digit seconds.</td>
</tr>
<tr>
<td>S</td>
<td>The date's ordinal suffix (st, nd, rd, or th). Works well with d.</td>
</tr>
<tr>
<td>l</td>
<td>Milliseconds; gives 3 digits.</td>
</tr>
<tr>
<td>L</td>
<td>Milliseconds; gives 2 digits.</td>
</tr>
<tr>
<td>t</td>
<td>Lowercase, single-character time marker string: a or p.</td>
</tr>
<tr>
<td>tt</td>
<td>Lowercase, two-character time marker string: am or pm.</td>
</tr>
<tr>
<td>T</td>
<td>Uppercase, single-character time marker string: A or P.</td>
</tr>
<tr>
<td>TT</td>
<td>Uppercase, two-character time marker string: AM or PM.</td>
</tr>
<tr>
<td>W</td>
<td>ISO 8601 week number of the year, e.g. 42</td>
</tr>
<tr>
<td>Z</td>
<td>US timezone abbreviation, e.g. EST or MDT.</td>
</tr>
<tr>
<td>'...'</td>
<td>Literal character sequence. Surrounding quotes are removed.</td>
</tr>
<tr>
<td>UTC:</td>
<td>Must be the first four characters of the mask. Converts the date from local time to UTC/GMT/Zulu time before applying the mask. The &quot;UTC:&quot; prefix is removed.</td>
</tr>
</tbody>
</table>

**Configure Identifiers For Recommendations Web**

Identifiers define what recommendations to use for a single page or for sets of similar pages.

Identifiers are values from your website that can be used to identify a page or a set of pages. They can come either from the path of a page URL or you can add Bronto identifiers to your site code. When your website’s URLs contain unique values that can identify these sets of pages, you should use these values as your identifiers. In Recommendations Web, you will associate an identifier with recommendations and a recommendation block layout.
design. Then, once the identifier is published and your site has the required Recommendations Web code on it, recommendation blocks will be added to pages that match an identifier.

Before you start configuring identifiers in Bronto, take time to map out how you want to use recommendation blocks on your site. This map should include:

1. A list of the pages you want to display recommendations on.
2. The recommendations you want to associate with each page.
3. The identifier for each page.

As you work on your map, see if there are patterns. Does your site have categories you want to display similar recommendations on? Do these pages share a URL value that can be used to group them? If so, you can group these pages under the same identifier.

Before you begin:

1. Have your identifier map ready.
2. Make sure all of the recommendations you want to use have been created.
3. Make sure you have designed the layouts you want to use.

To configure identifiers:

2. Click the Recommendations Web icon.
3. Click New Identifier.
4. Provide a name in the Label box.
   You'll use this label to keep track of the identifier in Bronto.
5. Enter the identifier in the Identifier Contains box.
   The identifier must match either a URL variable for your site or a Bronto identifier you added. You can use a wildcard (*) before and/or after the identifier if you want pages which contain other details in the identifier to match. For example, if you have pages for shoes that use variables like /womenshoes/, /menshoes/, and /kidshoes/ you can use *shoes* to use the same identifier (hence, recommendations) on all of these pages.
   
   Note: Your domain cannot be used when matching identifiers.
6. Click Create Identifier.
   The identifier is displayed in the list of identifiers.
7. Add a recommendation to the identifier:
   a) Click Add Another Recommendation.
   b) Either
      • Start typing the name of a recommendation and click on the name when it auto-completes.
      • Click the search icon and select the recommendation from the list by clicking on it.
8. Now configure the settings for the recommendation:
   You only need to do this if you do not want the recommendation to use your default settings.
   a) Click the gear icon that's located next to the recommendation you just added.
   b) Select the Layout you want to use.
   c) Enter the recommendation number you want this list of recommendations to start with in the Starting Position box.
      Typically your starting point will be 1, but if you plan on using the same recommendation more than once, you may want to start with a different number in order to avoid duplicate recommendations.
   d) Enter the number of product recommendations you want to include in the block in the Number of Results box.
   e) Enter the number of products you want to appear in each recommendation row in the Number of Products Per Row box.
f) Indicate whether or not to use **Scrolling** to display your results.

If you enable scrolling, you will not need to set the **Number of Products Per Row**. Instead, you will need to:

1. Provide the number of products you want to be visible in the **Number of Products Per Scroll** box.
2. Select the visual design you want to use for the scroll from the **Scrolling Design** list.

g) Click **Save**.

9. Repeat the previous two steps to associate and/or design additional recommendations.

Each identifier can be associated with up to 3 recommendations. At this point, the identifier exists in Bronto, but it isn't available for use on your website. To use the identifier outside of Bronto, it needs to be published.

10. If you're ready to use the identifier to post recommendation blocks on your site, click **Publish Draft**.

This lets Bronto use the identifier to try to match identifiers on your site. Your [Recommendations Web Site Configuration](#) on page 1440 must be set up properly for the identifier you just configured to work properly.

**Manage Identifiers**

Recommendations Web provides a Settings page you can use to configure default values for identifiers and to define how the recommendations should behave on your website.

App settings provide a default recommendation block design. If you do not configure the design for a recommendation that is associated with an identifier then these settings will be used.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit identifier Label</td>
<td>Click on the <strong>Edit</strong> icon on the far right of the blue bar for the identifier you want to edit. This option is not available for the <strong>Default</strong> identifier.</td>
</tr>
<tr>
<td>Edit Identifier Value</td>
<td>Click on the <strong>Edit</strong> icon on the far right of the blue bar for the identifier you want to edit. This option is only available until the identifier has been published and is not available for the <strong>Default</strong> identifier.</td>
</tr>
<tr>
<td>Remove A Recommendation From An Identifier</td>
<td>Click the <strong>X</strong> icon to the right of the recommendation you want to remove.</td>
</tr>
<tr>
<td>Edit A Recommendations Settings</td>
<td>When a recommendation is first added to an identifier, its settings are set to your default settings. These settings are defined on the <strong>Settings</strong> tab. To update these settings for the specific recommendation, click on the <strong>Gear</strong> icon to the right of the recommendation. From the <strong>Recommendations Settings</strong> window which appears, you can choose what layout you want to use to display the results on your website, the number of products you want to display, and whether or not to use scrolling to display your results, including the selection of the arrow icons to use.</td>
</tr>
</tbody>
</table>
### Settings and Description

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publish A Draft</td>
<td>Once you feel comfortable with the identifier’s configuration, click the <strong>Publish Draft</strong> button to make it available to your website. Edits made to the identifier and its settings after it is published will create a new draft version that won’t affect your website until it is subsequently published and overwrites the currently published version. In the event your draft identifier is using a layout which contains a draft version, that draft layout will also be published.</td>
</tr>
<tr>
<td>Delete A Draft</td>
<td>Click on the <strong>Delete Draft</strong> button to delete a draft of the identifier. If a published version already exists, it will remain published with no draft. If only a draft version existed, the entire identifier will be deleted.</td>
</tr>
<tr>
<td>Copy An identifier</td>
<td>Click on the <strong>Copy</strong> icon on the far right of the blue bar for the identifier you want to copy, then provide the new <strong>Identifier Label</strong> and <strong>Identifier Contains</strong> to use. This feature is helpful if you want to create something very similar for a new identifier, with only minor modifications.</td>
</tr>
<tr>
<td>Delete An Identifier</td>
<td>Click on the <strong>Delete</strong> icon on the far right of the blue bar for the identifier you want to delete. This option is not available for the <strong>Default</strong> identifier.</td>
</tr>
<tr>
<td>View A Published Identifier</td>
<td>If you have an identifier which has a version of <strong>Published</strong> or <strong>Published / Draft</strong>, you can view what is currently published by clicking on the <strong>Up Arrow</strong> to the right of the <strong>Recommendations</strong> label, and then clicking on the Published tab to see what recommendations are currently published. You can click on the <strong>Gear</strong> icon to the right of the recommendation to see a read-only view of that recommendation’s settings.</td>
</tr>
</tbody>
</table>

### Recommendations Web Settings

Recommendations Web provides a Settings page you can use to configure default values for identifiers and to define how the recommendations should behave on your website.

You can access Recommendations Web settings by going to **Home > Tables > Recommendations + Web**, clicking the Recommendations Web icon, then clicking on the **Settings** tab.

### App Settings

App settings provide a default recommendation block design. If you do not configure the design for a recommendation that is associated with an identifier then these settings will be used.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Layout</td>
<td>The default layout design. This will be Bronto Predefined Recommendation until you select a different layout.</td>
</tr>
</tbody>
</table>
### Setting | Description
---|---
Starting Position | The starting point to use in your recommendation result set. If you wish to start with the best products from your results, set this value to 1. This will be the most common value to set.
Number of Results | The number of products you want to display on your site.
Number of Products Per Row | The number of products from your results you want to display on each line. If you select a number less than the Number of Results, products will be displayed on multiple rows.
| This option is not available if you enable **Scrolling**.
Scrolling Design | Enabling this displays results with scrolling arrows rather than displaying multiple rows of data. This option is a good way to show a larger number of results to visitors in a limited space on your site.
| When the visitor gets to the end of the results, clicking the right or down arrow will return to the first set of products.
Number of Products Per Scroll | Only visible when you enable **Scrolling**. The number of products to display at one time within the scrolling arrows.
Select a design | Only visible when you enable **Scrolling**. Choose from a list of horizontal and vertical designs for your scrolling.
| Choosing
• **Horizontal** displays results horizontally with arrows displayed to the left and right of the products.
• **Vertical** displays results vertically with arrows displayed above the products.
Preview Product | This **Product ID** will be used to preview layout designs in the **Layout Editor** and on the **Layouts Dashboard**.
| When editing, you can use the **Magnifying Glass** to search your product catalog.

### Site Settings
Site Settings helps you to define how product data should be used to display results, what to do when unexpected circumstances occur and whether or not to track clicks for reporting.

| Setting | Description |
---|---|
Sale Price Rule | Lets you display dynamic product content in your results based on a product being on sale. To use this, choose the rule that aligns to how your data will be represented in your product catalog to indicate the product is on sale.
| This option is only available if you have the appropriate fields mapped in your product catalog.
Disabled all Recommendations Web usage | When enabled, this blocks recommendations from executing. No recommendations will be sent to your site.
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| Use Offline Storage                | Recommendations Web stores a copy of the results of your site’s **Default Recommendation** (defined on the **Global Settings** page) offline for access in the unlikely event Bronto experiences downtime or extreme slowness. This storage occurs once a day.  
When this option is enabled, if response times become slow, the offline results are used to populate your recommendation, ensuring something is always displayed to the user. This assumes your default recommendation is producing results. If it is not producing results, you will receive an email when we attempt to store these results nightly.  
If this option is disabled and slowness occurs, no products will be displayed for the recommendation(s). |
| Use Default Recommendations        | When this option is enabled, if a requested recommendation does not return sufficient results to meet the requested number of products, the recommendation’s setting for whether or not to use the default recommendation will be ignored, and the default will always be used.  
This allows you to have a different set of logic for usage of the default recommendation for your email messages and your site. |
| Send Google Analytics click events  | When this setting is enabled, all links in your product display will be appended with a Google Analytics click event, which when clicked will send an event to Google Analytics with the recommendation id and product id clicked. This data can be viewed in Google Analytics if your website has it configured for event tracking. |
| Display Audit Log for Live Mode    | When this setting is enabled, a log of actions taken by the Recommendations Web JavaScript will be displayed in the browser’s Developer Tools Console tab.  
When disabled, this log can still be viewed at any time by typing the command `bronto('webRecs:printBrontoLogVar');` in the Console. |

**Recommendations Web Test Mode**

You can run Recommendations Web in test mode by modifying it's script. Typically, this will be done on a staging website where testing is conducted prior to promoting those changes to your production site.

When using test mode, several changes in behavior will occur:

- If available, draft versions of recommendation identifiers and layouts will be used instead of published versions. This allows you to test changes to your identifiers and layouts without having an impact on your production site.  
To make drafts available when running in test mode, click the **Promote Changes for Testing** button in the app.  
Whenever you make changes to your draft identifiers and layouts, you must click this button again to see your changes reflected on your test site.  

- Browse events will not be stored for the contacts you use for testing. This means you can test using real contact email addresses without affecting their browse history or triggering Browse Recovery emails (if you use this app).
• Metrics will not be captured on the Recommendation Effectiveness report.
• Google Analytics click events will not be triggered.

To run in test mode, place the following function call code on every page:

```javascript
<bronto('enableTestMode');
</script>
```

after the Web Integration Manager code. All of your other site configuration code must also be properly set up for test mode to work.

To make drafts available when running in test mode, click the **Promote Changes for Testing** button in the app. You will still need to publish identifiers individually to make them available on your production site.

If you do not see your changes on your testing site, try opening a private browsing session in your browser.

---

**Browse Recovery App**

Browse Recovery allows you to capture potentially lost revenue based on the behavior of contacts on your site.

1. **Important:** If you do not have the Browse Recovery app and would like information about purchasing it, see Bronto’s App Center or contact your account manager.

You can access Browse Recovery by going to **Apps > Browse Recovery**. The first time you open this page there will be a wizard that walks you through configuring Browse Recovery settings.

Browse Recovery allows you to define rules that can be used to send targeted messages to contacts based on their browse behavior. Before you can configure Browse Recovery rules you need to have imported a product catalog and configured browse settings to capture browse data.

When Bronto captures page views that are associated with an email address that does not belong to an existing Bronto contact, a new transactional contact is created. Contacts with a transactional status can only be sent transactional emails, so they will not be used to trigger Browse Recovery Rules. These contacts do not count against your contact allocation.

Browse Recovery has three rules that are used to engage Bronto contacts:

1. **Product Threshold:** This rule is based on the number of times a contact browses a specific product within a set period of time.
2. **Category Threshold:** This rule is based on the number of times a contact browses products within the same category within a set period of time.
3. **Recently Viewed:** This rule is based on overall product views on your site within a set period of time. The products viewed do not have to have a relationship to each other.

Each rule is taken into consideration in the order listed above. If a contact meets the criteria defined for Product Threshold, and any additional rule settings you have defined, the contact will be sent the email associated with Product Threshold. If they do not meet the Product Threshold criteria, but meet the Category Threshold criteria, then the contact will be sent the email associated with Category Threshold. If the contact does not meet the Product or Category Threshold criteria, but meets the Recently Viewed criteria, the contact will be sent this message. This hierarchy is designed to send each contact the most accurately targeted email while also avoiding sending too many emails to a single contact.

Once Bronto has begun collecting browse data and Browse Recovery is scheduling deliveries, you can view statistics on the **Browse Recovery Dashboard** on page 1472 and browse message sends and exclusions on the **Browse Recovery Activity Page** on page 1473. In addition to report metrics for Bronto contacts, on the dashboard you can see what percentage of the customers browsing your site are not associated with a Bronto contact and cannot be engaged.
Browse Settings

Browse settings can capture product page views on your site and send this data to Bronto for use in Recommendations Premium and Browse Recovery messages.

**Note:** If you do not use the Recommendations Premium or the Browse Recovery apps you cannot access the browse settings page in Bronto.

You can access browse settings by navigating to **Home > Settings > Browse**. Before you can see data on this page you need to have imported a product catalog.

**Warning:** If you use Recommendations Web, do not use the browse scripts located on this page; use the Web Integration Manager script instead. See Add The Web Integration Manager Code To Your Site on page 1356 for more information.

After you have imported a product catalog, the first time you come to the page you will see a wizard that walks you through the steps to configure your browse settings. These steps are the same as the steps in the Capture Browse Data on page 1463 topic, starting with step 4. So, you can use the information in the Capture Browse Data on page 1463 topic if you need help when completing the wizard.

After you complete the wizard, this page can be used to monitor the health of your account and to view browse-related events.

**Settings Panel**

The Settings panel can be accessed by clicking the settings gear icon 🛡️. This panel has two tabs. The Script tab contains the Bronto script you need to incorporate into your site. The Selectors tab is where you indicate what CSS selectors or JSON objects Bronto should use to collect data from your site. For more information see Capture Browse Data on page 1463.

**Inspector Tab**

The Inspector tab provides a high-level view of the health of your browse setting that can be used to monitor your account. It's possible that a change to your site, whether it is a major overhaul in site design or a small change that impacts your selectors, could cause your browse settings to stop working properly. In order to prevent this from going unnoticed, the Inspector tab allows you to see a high-level view of the overall browse activity status, events, and the collection of email addresses and product browse data.

You can also click the notification settings icon on the **Overall Status** card and provide an email address that Bronto can use to notify you of issues. We will send you an email if:

- More than 24 hours have passed since the last browse event was recorded. This could indicate that something has gone wrong with the JavaScript snippet on the site, or that the page has changed and the product id selectors are no longer valid.
- None of the browse events in the last 24 hours contained an email address and/or product ID.
- Four or more of the last 10 product IDs captured do not match a product ID in your catalog.
- The last event that was checked is not reflected in the product catalog. This could indicate the product catalog isn’t up-to-date or that the Product ID Selector is not targeting the correct product IDs for the site.

**Events Tab**

The Events tab contains a list of the real-time browse events that Bronto has recorded for your site. The list contains the most recent 100 browse events that have occurred in the last 24 hours. Here you can view the:

- Contact's email address

  When browse captures page views that are associated with an email address that does not belong to an existing Bronto contact, a new transactional contact is created. Contacts with a transactional status can only be sent transactional emails, so they will not be used to trigger Browse Recovery Rules or be sent marketing messages from the app. These contacts do not count against your contact allocation.

- Path for the page that triggered the event
• Product ID that is associated with the browsed page
• Date and time the browse activity was recorded

Related Topics
Contact Status on page 1083
Contact status indicates whether or not you can send marketing emails to a contact and the level of engagement you have with a contact.

Transactional Emails on page 294

Capture Browse Data
You can configure Bronto to capture browse data from your site. Browse data is information about which products your contacts view.

Note: If you do not use the Recommendations Premium or the Browse Recovery apps you cannot access the browse settings page in Bronto.

Once captured, Bronto can use this data to help improve product recommendations in messages that are sent either automatically by Browse Recovery or that you've designed to include a Recommendations Premium recommendation that leverages browse data. In order to capture browse data you need to:

1. Add the Bronto script to your site.

   Warning: If you use Recommendations Web, do not this script; use the Web Integration Manager script instead. See Add The Web Integration Manager Code To Your Site on page 1356 for more information.

   The script allows Bronto to track browsing behavior, identify email addresses associated with Bronto contacts, and to send this information back to Bronto. You can either manually add the script or use Google Tag Manager to add the script. We recommend adding the script to the footer of your site in order to ensure that pop-ups and all other possible opt-in sources are captured.

   If you are a marketer and want to have a developer who works on your site embed the code, the script settings include an option to email your developer the information they need to complete this work.

   To email the script to your developer:
   a. Go to Home > Settings > Browse.

      Important: The first time you configure Browse there will be a wizard designed to make this process easier. If you see the wizard, skip to step d and use the wizard to send the information to your developer.

   b. Click the settings gear icon.
   c. Click Script.
   d. Enter the developer's email address in the To Email box.
   e. Enter the developer's name in the To Name box.
   f. Enter your email address in the From Email box.
   g. Enter your name in the From Name box.
   h. Click Send.

   To embed the script yourself, follow the steps below.

2. Configure selectors in Bronto.

   Selectors let Bronto know which CSS selectors or JSON objects to use in order to capture unique product views and associate these views with a contact. In the code for your site, there are variables that are used to identify types of data on your site including variables that represent product data and email addresses. Once the Bronto script is embedded on your site, you can use the selectors tab to map the selectors associated with these variables. When the selectors are mapped, Bronto can use these variables to capture data from your site.

   Because all of your product data is stored in Bronto, the only product selector you need to target is the variable that represents the product ID. The selector you identify for the Product ID Selector must pull in product IDs that match the Product ID field data in your Bronto product catalog. If this selector is mapped to data that does not line up with Product IDs in Bronto, then Bronto cannot recognize activity associated with these IDs as valid
events. Make sure the targeted ID doesn’t contain any additional labels, prefixes or suffixes that are not found on the Product ID in Bronto or it won’t match.

Note:

If your site only uses parent product IDs (i.e. a product with multiple variations such as color and/or size) and does not change IDs as variations change on the page, then the Parent's Product IDs must be available in the Bronto product catalog so that browse events can be tracked using the parent product.

In addition to the Product ID Selector, you will need to target the selector that is used to capture email data. Email address might come from multiple sources on your site; it’s critical to capture every one of these selectors. The email address is what is used to associate browse activity with Bronto contacts. If an email selector isn't configured properly, none of the browse data associated with the selector is captured.

When you use a Bronto connector (Shopify, Magento, or Demandware) you can choose your integration from the Commerce Platform Integration list and the selector configuration you already have for your connector will be populated into the app. If you do not use a connector, you will need to decide whether to target a CSS selector or JSON object. Both are objects that contain a data point for a product and can be found in your site's code.

What you need to choose depends on how your site was designed. Typically, a product ID can be targeted using a CSS selector. If your site uses a JSON object to store your product ID, then that should be targeted instead. When you use JSON selectors, you must use array notation when configuring the selectors; JSON dot notation does not work properly.

The steps below walk you through both of these tasks. When you complete them Bronto will begin capturing browse data for your site.

1. Go to Home > Settings > Browse.

   🔄 Important: The first time you configure Browse there will be a wizard designed to make this process easier on the main page. If you see the wizard, skip to step 4 and use the wizard to complete this task.

2. Click the settings gear icon 🔄.

3. Click Script.

4. From the Script Installation list, select

   • Add Manually to Footer to view code you can copy and paste into your site.
   • Leverage Google Tag Manager to view code you can copy to use with Google Tag Manager.

5. Copy the script from the Script box.

6. If you selected

   • Add Manually to Footer then add the script to your site.

      The code should be added to each page on your site that contains product data or email addresses. We recommend embedding the code in the site’s footer code so that the embed code runs after everything else on the page.

   • Leverage Google Tag Manager then use the code snippet within your Google Tag Manager account.

7. Once the code is embedded on your site, click the Selectors tab in Bronto.

   🔄 Note: If you are using the wizard, click Next instead.

8. If you use one of the listed integrations, select it from the Commerce Platform Integration list or select Other/None:

   • If you select Magento Connector v3.0+, the other selector settings are no longer displayed and the settings you have in the Magento Connector are used. Click Save to finish.
   • If you select Demandware Connector v16.1+, the Selector Type is set to CSS and the Product Selector fields are automatically populated. You cannot edit these options, but you can still edit the email and general selector parameters.
• If you select **Shopify Connector v1.0+**, the **Selector Type** is set to **JSON** and the **Product Selector** fields are automatically populated. You cannot edit these options, but you can still edit the email and general selector parameters.

• If you selected **Other/None** nothing is automatically populated and you should complete all of the following steps.

9. For **Domain**, specify the domain you want to capture browse data for.

   **Note:**
   - When you specify a domain, all events for a unique contact across all subdomains will be merged under the same contact record, from that point forward. All browse events from before you specified a domain will remain separate across the subdomains.
   - If you capture an email address from one subdomain, it can be used across all subdomain event associations.

10. Optional: If you want to capture email addresses only after a contact has clicked a button, turn on the **Use Email Submit Button Selector(s)** toggle.

    If this toggle is turned on, enter the button selector(s).

    • When the button being targeted has a type identified, such as `<button type="submit">`, the value entered should be `input[type=button]`
    • When the button has an ID, such as `id="popup-submits-button-123"`, the value entered should be `#popup-submits-button-123`

11. Enter the **CSS selector(s)** used to capture emails on your site in the **Email Selector(s)** box.

    This allows Bronto to recognize the email address of a customer browsing on your site and, when possible, to associate that email with a Bronto contact. If you use different selectors to capture email addresses, you can enter multiple selectors using a comma separated list.

12. Optional: Enter **contact_eid** in the **Contact ID URL Parameter(s)** box.

    This allows Bronto to capture data for a contact by associating the browse data with the contact's unique external ID. You should use Bronto's custom analytics feature to help set this association up. See **Custom Web Analytics Connection** on page 1294 for more information.

13. From the **Product Selector Type** list select

    • **CSS** if you are using jQuery selectors to identify your products.
    • **JSON** if you are using JSON objects to identify your products.

    It is more typical to use CSS. If you're not sure which your site uses, find a product ID on your site and view its source code. If the product ID is defined inside of a `<script>` tag and looks similar to `"Product ID" : "SKU123"`, the site is using JSON. If it is defined inside any other element, such as a `<div>` tag, and looks similar to `<div class="product" sku="SKU123">`, the site is using CSS.

14. Enter the jQuery selector or JSON object you want to target in the **Product ID Selector** box.

    You can target multiple selectors by entering each one in the box using a comma separated list.

    Typically you would want to target the selector that represents the SKU, which will map to the Product ID field. The selector you identify for the **Product ID Selector** must pull in product IDs that match the Product ID field data in your Bronto product catalog or Browse Recovery rules will not trigger properly. Because the Product ID is unique, Browse Recovery can pull all of the other product data from your Bronto product catalog.

    **Note:** If you use JSON, you must use JSON array format. For example, `product["id"]`.

Examples of how you might translate the code to a selector:

- **CSS code:** `<div class="product" name="My Product Name" sku="SKU123" url="https://mysite.com/sku123.jpg"></div>` would translate to the selector `div.product`
- **CSS code:** `<span class="sku-value" itemprop="sku">SKU123</span>` would translate to the selector `span.sku-value`
• CSS code: `<input id="productID">SKU23</input>` would translate to the selector `#productId` or `input[id="productId"]`.

• JSON code: `dataLayer = [{ ‘ProductId’ : ‘SKU123’ }];` would translate to the selector `dataLayer[0]\\['ProductId’]`.

• JSON code: `dataLayer = { ‘ProductId’ : ‘SKU123’ };` would translate to the selector `dataLayer[‘ProductId’]`.

15. Optional: If you use CSS selectors and want to target an attribute, enter it in the Product ID Selector Attribute box.

You can only target an attribute for CSS selectors and you only need to target an attribute when the code snippet related to the Product ID (SKU) is stored at the attribute level. For example, your site code might have `<div id="product-sku" data-actual-sku="blah-123"></div>`. In this case, the Product ID Selector would be `product-sku` and the Product ID Selector Attribute would be `data-actual-sku`.

16. From the Product ID Selector Visibility list select

- All if you want the view tracked any time the selector is present in the code for the page, even if the contact does not see it.
- Visible On Page if you want the view tracked only when a contact views a page with the content associated with the selector on it.

This setting mostly impacts whether you want a pop up or mouse over to count as a page view. If you want to count every interaction with a product, select All.

17. Click Save.

    Note: If you are using the wizard, click Next, enter an email address you want to receive email alerts at, then click Next again.

18. Close the Settings panel.

Related Topics

Custom Web Analytics Connection on page 1294

The Custom Web Analytics Connection provides you with insight into the effects of traffic that was driven to your site via email marketing, as well as how effective that traffic was at reaching your marketing goals.

Browse Recovery Rules

Browse Recovery uses a set of three rules in order to determine when messages should be sent to a contacts based on browse behavior.

Important: If you do not have the Browse Recovery app and would like information about purchasing it, see Bronto’s App Center or contact your account manager.

These rules are:

1. Product Threshold: This rule is based on the number of times a contact browses a specific product within a set period of time.
2. Category Threshold: This rule is based on the number of times a contact browses products within the same category within a set period of time.
3. Recently Viewed: This rule is based on overall product views on your site within a set period of time. The products viewed do not have to have a relationship to each other.

Each rule is taken into consideration in the order listed above. If a contact meets the criteria defined for Product Threshold, and any additional rule settings you have defined, the contact will be sent the email associated with Product Threshold. If they do not meet the Product Threshold criteria, but meet the Category Threshold criteria, then the contact will be sent the email associated with Category Threshold. If the contact does not meet the Product or Category Threshold criteria, but meets the Recently Viewed criteria, the contact will be sent this message. This hierarchy is designed to send each contact the most accurately targeted email while also avoiding sending too many emails to a single contact.

To use a rule you:
• Configure the global rule settings, which include setting rule time delays, providing sending options, and defining the product fields you plan to use in your Browse Recovery emails.
• Build the Browse Recovery emails to be used for each rule using the Browse Recovery tags provided in the Rule Settings.
• Configure the criteria used for the rule and associate the appropriate email.
• Turn the rule on.

For the best performance, monitor the results of your rules after initial configuration. After a few weeks, make adjustments that you feel will improve its performance. It's best not to make too many adjustments at once. Instead, make incremental tweaks so that you can easily see which changes improve performance and which hurt. Also, making adjustments at the beginning of a month will allow you to use the monthly metrics on the Rule Performance Report in order to see how changes to the rules improve (or hurt) rule performance from month to month. Or you can use delivery groups to organize and track the different sends and performance metrics.

**Related Topics**

Delivery Groups on page 577

Delivery groups allow you to group together messages, deliveries, posts, and/or automated message rules in any combination you like.

**Configure Browse Recovery Rules Global Settings**

In order for Browse Recovery rules to send emails, you will need to configure the sending options to use for your messages. These settings are applied to all three Browse Recovery rules.

There are two types of global settings you will need to configure:

• The time-based settings that determine when emails are sent to contacts.
• Your sender options. This is the same as the sender options you would configure when you schedule an email.

To configure the global settings for your Browse Recovery rules:

1. Go to Apps > Browse Recovery.
2. Click the Rules tab and then click Settings button.
3. Set the time delays:
   a) Set Evaluate rules X hours after last page view to the number of hours you want to pass before the contact's browse history is evaluated.
      The clock begins when the contact's last interaction with the site is recorded. Once the Rule Evaluation Time Delay has passed, a contact will be evaluated and sent an email if they meet the all of the settings and criteria for a rule.
   b) Set Do not send the same rule within X days to the number of days you want to pass before a contact can be sent an email using any of the rules after the last email was sent using Browse Recovery.
      In this case, even if the contact meets the criteria for a rule they will not be sent a new message if it is within the Customer Eligibility Time Delay period, no matter which rule was used when the last message was sent.
   c) Set Allow sending again after X days to the number of days you want to pass before a contact can be sent an email using the same rule.
      For example, if a contact was sent an email using the Product Threshold rule, they will not be sent another email with this rule before this number of days pass. However, the contact can still be sent an email using one of the other rules so you should make sure this setting is fewer days than Do not send the same rule within X days. This lets Browse Recovery send messages that are triggered by other rules and keeps a contact from receiving repetitive email due to the same rule.
4. Configure your sender options:

Browse Recovery automatically sends messages based on a contact meeting the criteria defined for a rule, so you will need to provide the sender options here instead of on the Send Message page. You need to provide sender options here even if you have set up default sender options for the platform.
   a) Enter a From Name.
The from name, also called an alias, is the name that appears to the recipient of the email message.

b) Enter a **From Email**.

The from address is the email address that your email message will appear from.

c) Enter a **Return Name**.

The reply address is the address that the application will forward email replies to.

d) Select **Sender Authentication** if you want to sign your email message with DomainKeys/DKIM.

e) Select **Reply Tracking** if you want to store a copy of all email replies to your email messages on the Email Replies page.

f) Select **Fatigue Override** if you want to Browse Recovery to send email to a contact even when it would exceed the email frequency cap you designated for your contacts.

Email frequency caps allow you to specify the maximum number of emails that can be sent to your contacts over given time periods. Because Browse Recovery sends emails to contacts based on their behavior, you might want to override the frequency cap setting so that revenue opportunities aren't lost due to the contact already meeting the cap due to regularly scheduled marketing messages.

g) If you want Browse Recovery to be able to send a contact an email while they still have a page on your site open, select **Allow Sending when Browser Idle**.

This allows you to contact someone if they've left the page open in a tab or window and "forgot" about it. However, it could seem intrusive to receive an email while still on a site, so this option is turned off by default.

5. Click **Save**.

**Configure Browse Recovery Rules Exclusions**

You can configure criteria that will exclude certain contacts from being sent a Browse Recovery message or certain products from being included in messages. These exclusions are applied to all three of the rules.

You can exclude contacts on any list or segment in your account from being sent Browse Recovery messages but you can only exclude one list and one segment at a time. You can also use order data stored in Bronto to set a number of days that should pass since a contact's last order before they can receive a Browse Recovery message.

For products, you have the option of setting up a filter on any product field that can be used to exclude products that meet the filter criteria. For example, you might want to exclude products that are less than a certain price or exclude products in a certain category, such as gift cards.

To configure the exclusions applied to your Browse Recovery rules:

1. Go to **Apps > Browse Recovery**.
2. Click the **Rules** tab and then click the **Exclusions** button.
3. On the **Contacts** tab, set the exclusion you want to apply to contacts:
   a) If relevant, select a list from the **List** list.

   Any contact on this list will not be sent a Browse Recovery email even when they meet the defined criteria.

   b) If relevant, select a segment from the **Segment** list.

   Any contact on this segment will not be sent a Browse Recovery email even when they meet the defined criteria.

   c) Set the number of days you want to pass since a contact's last order before they can receive a Browse Recovery message using the **Days Since Last Purchase** slider.

   This setting is independent of the list and segment exclusion settings and will be applied to all contacts.

4. On the **Products** tab, define filter criteria you want to use to exclude contacts from being included in your messages:
   a) Select **Exclude Multiple Variations** if you do not want variations of a product to count as unique views.

   b) Click **Add Filter**.

   c) Select a product field to filter against from the **Product Field** list.

   d) Select an operator to apply to a field from the **Operator** list.
e) If required, enter the information relevant to your **Operator Product Field** combination in the **Value** box.

Most, but not all, **Operator Product Field** combinations require you to specify a value to compare the field data for each product against. For example, if you wanted to make sure items are in stock when a message is sent, you could select **Quantity** for the **Product Field**, **Greater Than** for the **Operator**, and provide the minimum number of items you want to be in stock for the **Value**.

f) Click the smaller **Save** button.

g) If you want to add more filters, repeat the previous steps.

5. Click **Save**.

**Configure Browse Recovery Test Send Emails**

You can send a test email in Browse Recovery to see if the message you created looks correct.

To send a test email:

1. Go to **Apps > Browse Recovery**.
2. Click the **Rules** tab and then click **Test Send**.
   The **Test Send** window slides open.
3. In the **Email(s)** text box, enter the email addresses, separated by commas, that you want to receive the test message.
4. For **Message to send**, choose the message you would like to test.
5. In the **Product ID(s)** text box, enter the product IDs of the products you would like to use to test the message.
6. For **Sort products by**, choose how you would like the products sorted in your message.
7. Click **Send**.

**Set Browse Recovery Product Threshold Rules**

Product Threshold will email contacts based on the number of times a contact views the same product within a specified period of time.

As you set up the criteria for Product Threshold, you will set the number of product views you want to occur within a certain number of days in order for the message you associate with the rule to be sent. You will also define the maximum number of products that can be included in the message, as well as criteria that is used to define the order in which products are shown.

To set up your Product Threshold rule criteria:

1. Go to **Apps > Browse Recovery**.
2. Click the **Rules** tab.
3. Locate the Product Threshold rule and click the edit icon.
4. Select the number of times you want a contact to view the same product in order to be eligible to receive a message from the **Threshold for views of the same product** list.
5. Set the number of days you want to monitor contact behavior within using the **Evaluate products viewed in the last** slider.
   This setting determines the length of time consecutive views have to occur during in order to trigger the rule. It does not mean that contact behavior is only monitored in this increment of time.
6. Select the minimum number of products you want to include in a message from the **Min number of products in message** list.
7. Select the maximum number of products you want to include in a message from the **Max number of products in message** list.
   If the contact has multiple products associated with the browse behavior defined by this rule's criteria, the message to this contact will contain multiple products. Setting a max limits the message to only the number of products you have defined. If the number of relevant products is less than the max, the message for the contact will contain less than this number.
8. Set how products will be included in a message:
These settings determine the order products are displayed in your message. You can set the order products appear in a message based on contact behavior (Most Viewed or Most Recently Viewed) or using product attributes. If a contact browsed more products than the maximum number of products you identified for the message, the products with the highest rank based on these settings are included in the message.

a) Select the product inclusion criteria from the first Sort products by list.

b) If you sorted using a product attribute, select how you want to sort products from the second Sort products by list.

9. Select the message you want to send from the Message to send list.

10. Click Save.

11. When ready, enable the rule by clicking the Enable toggle.

Set Browse Recovery Category Threshold Rules

Category Threshold emails contacts based on the number of times a contact views products within the same category during a specified period of time.

As you set up the criteria for Category Threshold, you will set the number of product views you want to occur within a certain number of days in order for the message you associate with the rule to be sent. Unlike the Product Threshold Rule, these products must be in the same category instead repeated views of the same product. This message is only sent if a contact does not qualify to be sent a Product Threshold message.

You will also define the maximum number of products that can be included in the message, as well as criteria that is used to define the order in which products are shown.

To set up your Product Threshold rule criteria:

1. Go to Apps > Browse Recovery.

2. Click the Rules tab.

3. Locate the Category Threshold rule and click the edit icon.

4. Select the number of times you want a contact to view the a product within the same category in order to be eligible to receive a message from the Threshold for product views in the same category list.

5. Set the number of days you want to monitor contact behavior within using the Evaluate products viewed in the last slider. This setting determines the length of time views have to occur during in order to trigger the rule. It does not mean that contact behavior is only monitored in this increment of time.

6. Select Only include unique product views if you do not want the rule to count multiple views of the same product.

7. Select the minimum number of products you want to include in a message from the Min number of products in message list.

8. Select the maximum number of products you want to include in a message from the Max number of products in message list.

If the contact has multiple products associated with the browse behavior defined by this rule's criteria, the message to this contact will contain multiple products. Setting a max limits the message to only the number of products you have defined. If the number of relevant products is less than the max, the message for the contact will contain less than this number.

9. Set how products will be included in a message:

These settings determine the order products are displayed in your message. You can set the order products appear in a message based on contact behavior (Most Viewed or Most Recently Viewed) or using product attributes. If a contact browsed more products than the maximum number of products you identified for the message, the products with the highest rank based on these settings are included in the message.

a) Select the product inclusion criteria from the first Sort products by list.
10. Select the message you want to send from the **Message to send** list.

11. Select the product field you want to use to identify your categories from the **Category Field** list.

12. Select **Separate catagory field by delimiter** if you want to broaden the scope of the product categories that will be evaluated for comparison.

   If enabled, when a category contains a delimiter each part of the delimiter is evaluated separately. For example, when this is not enabled the rule will only match `Apparel > Shoes` to `Apparel > Shoes`. When this is enabled, the rule will match `Apparel > Shoes` to `Apparel > Shoes` and also both `Shoes` and `Apparel` individually.

13. Click **Save**.

14. When ready, enable the rule by clicking the **Enable** toggle.

**Set Browse Recovery Recently Viewed Rules**

Recently Viewed will email contacts when there is browse activity within a specified period of time.

The Recently Viewed rule is only considered when a contact failed to meet the criteria defined for Product Threshold or Category Threshold within the time period being evaluated. If a contact meets the criteria defined for Recently Viewed - they viewed a certain number of products within the set period of time - the contact will be sent an email that contains at least some of the products they have browsed.

As you set up your criteria for this rule it is important to carefully consider how a contact receiving a Recently Viewed Message will impact their eligibility to receive Product and/or Category Threshold emails in the near future based on your global rule settings. If you set the **In How Many Days** criteria for this rule to a much shorter period of time than the other rules, then the contact is more likely to qualify for this rule first. This isn't to say you should set this rule using difficult-to-achieve criteria; sending a Recently Viewed email has value and the ability to capture potentially lost revenue. Just be sure to balance your settings for all three rules so they best reflect and capture the consumer behavior for your site.

To set up your Product Threshold rule criteria:

1. Go to **Apps > Browse Recovery**.
2. Click the **Rules** tab.
3. Locate the Recently Viewed rule and click the edit icon.
4. Set the number of days you want to monitor contact behavior within using the **Evaluate products viewed in the last** slider.

   Browse Recovery will evaluate a contact's browse behavior this many days back from the contact's last browse event to see if their behavior during this period of time meets any of the active rules.

5. Select the minimum number of products you want to include in a message from the **Min number of products in message** list.
6. Select the maximum number of products you want to include in a message from the **Max number of products in message** list.

   This both defines the minimum number of products a contact needs to have browsed in order to be sent a message as well as the maximum number of products the message for this rule will contain.

7. Set how products will be included in a message:

   These settings determine the order products are displayed in your message. You can set the order products appear in a message based on contact behavior (**Most Viewed** or **Most Recently Viewed**) or using product attributes. If a contact browsed more products than the maximum number of products you identified for the message, the products with the highest rank based on these settings are included in the message.

   a) Select the product inclusion criteria from the first **Sort products by** list.
   b) If you sorted based on a product attribute, select how you want to sort products from the second **Sort products by** list.

8. Select the message you want to send from the **Message to send** list.
9. Click Save.
10. When ready, enable the rule by clicking the Enable toggle.

**Browse Recovery Dashboard**

The Browse Recovery dashboard provides reports that give you insight into the performance of the Browse Recovery app.

**Important:** If you do not have the Browse Recovery app and would like information about purchasing it, see Bronto's App Center or contact your account manager.

The Dashboard page can be accessed by going to Apps > **Browse Recovery**, then clicking the **Dashboard** tab. It's also the page that is shown by default when you open the app. At the top of the dashboard are the lifetime conversion metrics for Browse.

Below are four reports, each providing a unique insight into the performance of the Browse Recovery app. The Most Viewed Products, Rule Performance, and Exclusions reports are all based on the past 30 days of performance, while the Product Views Over Time report reflects all of the historical view data since the app began receiving Browse data.

If you want to see Browse Recovery performance data specifically related to contacts, you can view this on the **Browse Recovery Activity Page** on page 1473. If you see unexpected results on the dashboard, the Activity page is also a good place to dig into the specific cause of an unexpected metric.

**Product Views Over Time, Rule Performance, and Visitor Views Report**

This report has three tabs. The first tab, **Rule Performance**, lets you see the metrics related to each rule. To view a metric, select it from the list located in the top-right corner of the report. You can mouse over any dot on the line graph to see the specific metric details related to that point in time.

The second tab, **Product Views**, provides statistics related to the overall browsing behavior on your site. In this report you can see:

- How many products have been viewed per month.
- The breakdown of product views by contacts in 4 different groups:
  - **No Email Address** - No email address is associated with the contact.
  - **New Email Address** - The contact has an associated email address but it is unable to be retrieved from Bronto.
  - **Unmarketable Visitor** - The contact has an associated email address but is not Active or Onboarding.
  - ** Marketable Visitor** - The contact has an associated email address that is Active or Onboarding.

The third tab, **Visitor Views**, lets you see the number of unique visitors per month. The visitors are broken into 3 groups:

- New Email Address
- Unmarketable Visitor
- Marketable Visitor

The number of visitors in each group is based on the contact's current status and so the number of contacts for each group of visitors can change within a month. However, if a contact's status changes, it does not affect the metrics from previous months.

**Rule Performance Report**

This report provides message performance metrics for each rule. This includes:

- The number of messages sent by the rule.
- The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered.
- The click rate represents the number of clicks that were recorded, as compared to the number of opens recorded.
- The loss rate represents the number of contacts who unsubscribed after receiving one of these messages.
You can use the statistics in this report to make decisions about how to tweak the criteria or messages for each rules based on their performance. For example, if click or conversion rates are lower than expected it might help to redesign the message that is being sent. Or if the loss rate is high you might want to adjust the sending frequency or exclusions rules.

**Exclusions Report**

This reports lists all of the exclusions that have occurred during the last 30 days, the reason for the exclusion, and the number of delivery attempts that were not made. You can use this report to adjust your exclusion rules if you feel like too many deliveries are not being delivered.

When your contact matches with an exclusion reason, they will not be sent messages after meeting Product Threshold, Category Threshold, or Recently Viewed Browse Recovery trigger criteria.

If the number of exclusions is much higher than expected, use the Exclusions list on the Activity tab to take a closer look at which contacts are being excluded and why. If the number of exclusions is much higher than the number of sends it's likely that the exclusion rules are too restrictive and should be adjusted. Though in some cases, such as exclusions due to recent purchases, a high number of exclusions are acceptable.

Some examples of exclusion reasons you may see on this report are:

- **Exclusion List**: The contact is on a list that you have set to exclude from receiving Browse Recovery messages. You can set an Exclusion List at Apps > Browse > Rules > Exclusions > Contacts. If the contact is on the selected list, then they will not be sent a message even if they meet the criteria for a rule.
- **Exclusion Segment**: The contact is on a segment that you have set to exclude from receiving Browse Recovery Messages. You can set an Exclusion Segment at Apps > Browse > Rules > Exclusions > Contacts. If the contact is on the selected segment, then they will not be sent a message even if they meet the criteria for a rule.
- **Recent Delivery**: The contact received a message recently and cannot be sent a new message until after the number of days configured at Apps > Browse Recovery > Rules > Settings under Allow sending again after X days elapses.
- **Recent Purchase**: The contact made a recent purchase and was not messaged because they are still within the set number of Days Since Last Purchase configured at Apps > Browse > Rules > Exclusions > Contacts.
- **Recent Rule Delivery**: The contact recently received a message because of the triggered rule and cannot be messaged again until the time set for Do not send the same rule within X days passes. This setting is configured at Apps > Browse Recovery > Rules > Settings.
- **Inactive Contact**: The contact does not have the status Onboarding or Active. Only contacts with those statuses can receive Browse Recovery messages.
- **Transactional Contact**: The contact has a status of Transactional. Transactional contacts cannot be sent Browse Recovery messages.
- **Product Filters**: The contact is viewing a product or a variation of a product that is excluded by Product ID at Apps > Browse Recovery > Rules > Exclusions > Products. Excluded products do not count toward meeting the Product Threshold rule.
- **Unknown Product**: The contact did not trigger the Product Threshold rule because a Browse Recovery activity was sent with an unrecognized Product ID. The Product Threshold rule can only be used to message contacts based on the number of times a contact views a product with a valid Product ID in Bronto.

**Most Viewed Products Report**

This report is a list of the most viewed products in the last 30 days, with the number of views for each product listed. You could use the information in this list to build other promotional campaigns around these products.

**Browse Recovery Activity Page**

The Browse Recovery Activity page is a contact-based record of the sends and exclusions the app has triggered in the last 30 days.

**Important**: If you do not have the Browse Recovery app and would like information about purchasing it, see Bronto's App Center or contact your account manager.
The Activity page can be accessed by going to Apps > Browse Recovery, then clicking the Activity tab. On this page there is an activity table that is divided into Sends, Exclusions, and Events. You can access any of these activity lists by clicking on the tab associated with the activity you want to view. You can also search any of these activities for a specific contact using their email address.

**Sends**

Sends is a list of the contacts Browse Recovery has sent messages to in the last 30 days. Here you can view the:

- Contact's email address
- Name of the message the contact was sent
- Browse Recovery Rule that triggered the delivery
- Product IDs that were included in the sent message
- Date and time the delivery was sent

Information about sends can be useful for strategic planning of future messages and marketing campaigns. For example, if you see a contact was sent a Category email, but that contact did not convert, you could send them a follow up message that provides a discount when they buy multiple products in the category.

**Exclusions**

Exclusions is a list of contacts who were excluded from a Browse Recovery delivery they were otherwise eligible for based on the criteria for a rule.

Here you can view the:

- Contact's email address
- What caused the exclusion
- Browse Recovery Rule that the contact was eligible for
- Product IDs the contact browsed that triggered the rule
- Date and time the exclusion occurred

There are many different reasons a contact can be excluded from a send and this tab provides the details you need to determine if and when you need to adjust your settings so contacts are not excluded. Some examples of what exclusions you might see here are:

- The contact is on a list or segment that was excluded
- The products the contact browsed did not meet your product filter criteria
- Browse Recovery recently sent the contact a different message
- The contact recently made a purchase

You could also use this information to schedule message deliveries for excluded contacts using the platform. If you do decide to send contacts on the exclusion list messages using the platform, do not use the messages you configured for your Browse Recovery rules. When one of these messages is sent without using the app, the platform will not have the information it needs to map the Browse Recovery tags appropriately. Instead, you should either make a copy of one of your Browse Recovery messages and replace the Browse Recovery tags with properly formatted Product tags or you should create a new message that contains the product information you want to send to your contacts.

**Browse Recovery Emails**

While you can use any editor to build your emails, you will need to carefully consider the placement of your Browse Recovery tags and how replacing the tags with product data will impact your overall message design.

**Important:** If you do not have the Browse Recovery app and would like information about purchasing it, see Bronto's App Center or contact your account manager.

Each Browse Recovery rule can have a single message associated with it. We recommend you make a unique email for each rule and do not reuse these messages for other purposes. Typically, a Browse Recovery email contains a single API loop that includes a Browse Recovery tag for each product field you want to include in your email. The syntax for a Browse Recovery tag is `%%$product. (#product_id_#).field%%` where
• $$product.(#product_id_#).$$ is a required syntax that must be used exactly as written.
• field is a variable that should be replaced with the product field you want included.

In your message design this will look similar to:

```{loop}
$$product.(#product_id_#).title$$
$$product.(#product_id_#).price$$
{/loop}
```

You only need to add a single API loop with one tag per each product field you want included in the message. When a rule is triggered, Browse Recovery provides the relevant product data to Bronto's API for each product that matches the rule's criteria and settings. At send, the placeholders are replaced in the message with the product data Browse Recovery provides. In this example the title and price for the products that meet the rule's criteria will be inserted into the message. If there are three products that meet the Browse Recovery rule's settings and criteria, then the title and price for three products are included in the message.

Browse Recovery using API Loop

To add the loop in emails designed with the email message editor:
1. Drag an API Loop element onto the canvas and place it where you want the products to appear.
2. Drag a Text element onto the canvas, placing it after the Begin API Loop tag but before the End API Loop tag.
3. Enter the relevant Browse Recovery tags in the Text element's Add Content box.

If you use the WYSIWYG or HTML editor, hard code the loop into your message. To do this:
1. Add `{dynamic_code}{loop}{/loop}{/dynamic_code}` tags to the email where you want the products to appear.
2. Enter the relevant Browse Recovery tags between the opening and closing loop tag.

You can manipulate what the results look by styling the column (email message editor) or div the loop is contained in.

### Advanced Styling For Browse Recovery Messages
You can use product tags and dynamic code in different ways to style your Browse Recovery messages.

#### Target specific products in your message
You can use product tags to target specific products from your array in your message or subject line. You can add the tag into the content directly, without an API loop.

If you want the first product in your array to show up in the subject line, you can add `%%$product. (#product_id_1).title%%` to the subject, where `title` can be any product attribute.

You can also use this syntax to style your message so that the products are in a layout of your choosing, rather than the default of being stacked. For example, you can style your message so that they are in a 3x2 grid.

> **Note:** You need to make sure the rule the message is associated with will always show the exact number of products that will be in the grid. So, for this example, you want the browse recovery rule to show from 6 to 6 products.

The following steps are for targeting products in a 3x2 grid in a message using the Email Message Editor:
1. Add 2 three column containers to your message.
2. Add an image element to each container if you want your message to show images of the products. In the image settings, add the tag to the Image URL. You can also add tags to the other fields in the image settings.
3. Add a text element to each container and add the tags for each product. For example, `%%$product. (#product_id_1).product_attribute%%` for the first product in the array and `%%$product. (#product_id_2).product_attribute%%` for the second product in the array, etc.

When you are finished, your message might look something like this:
Use Dynamic Code to style your message

You can use dynamic code to have a message display products a specific way, based on certain criteria.

For example, you can use dynamic code to have a message display a certain way if there is only 1 product result versus if there are many products. The following steps show how to do this in the Email Message Editor:

1. Add a 1 column container to your message.
2. Add an API Loop to the first container.
3. In the API loop, add an HTML element and add `{if "%%$product.(#product_id_2).title%%" eq ''}{literal}
4. Add a second 1 column container and add elements to create a layout for when a single product is displayed.
5. Add a third 1 column container, add an HTML element to it, and add `{/literal}{else}{literal}
6. Add a 2 column container and add elements to create a layout for when multiple products are displayed.
7. Add another 1 column container, add an HTML element to it, and add `{/literal}{/if}
8. Add one more 1 column container.
9. Go to the first container and find `</> End API Loop`. Move it to the last container.

When you are finished, your message should look something like this, depending on how you styled containers 2 and 4.
Related Topics
Include Product Data In Cart and Order Tags on page 174
When you use the Order Service and have imported product data, you can use a combination of product and cart data in your messages.

Add Tags Using The Message Editor on page 67
With the new message editor you can quickly add field, special, content, RFM, product, and cart/order tags to your messages using the Insert menu. You also have the option of adding tags to the subject line of your message using the drop down arrow to the right of the subject line.

Add Recommendations In The Email Message Editor on page 76
You can add a recommendation to your messages using the Rec Loop element.

Use The Browse Recovery Wizard
The first time you use Browse Recovery you will need to use a wizard to configure the basic Browse Recovery settings.

The wizard is designed to get you up-and-running quickly; you can adjust any of the settings from the Rules page later. Before you can use the Browse Recovery wizard, you need to configure your account's browse import settings.

To use the wizard:
1. Go to Apps > Browse Recovery.
2. On the Exclude page, set the exclusion you want to apply to contacts:
   a) If relevant, select a list from the List list.
      Any contact on this list will not be sent a Browse Recovery email even when they meet the defined criteria.
   b) If relevant, select a segment from the Segment list.
      Any contact on this segment will not be sent a Browse Recovery email even when they meet the defined criteria.
   c) Set the number of days you want to pass since a contact's last order before they can receive a Browse Recovery message using the Days Since Last Purchase slider.
      This setting is independent of the list and segment exclusion settings and will be applied to all contacts.
   d) Click Next.
3. On the Sending page, configure the global settings:
   a) Set Evaluate rules X hours after last page view to the number of hours you want to pass before the contact's browse history is evaluated.
      The clock begins when the contacts last interaction with the site is recorded. Once the Rule Evaluation Time Delay has passed, a contact will be evaluated and sent an email if they meet the all of the settings and criteria for a rule.
   b) Set Do not send the same rule within X days to the number of days you want to pass before a contact can be sent an email using any of the rules after the last email was sent using Browse Recovery.
      In this case, even if the contact meets the criteria for a rule they will not be sent a new message if it is within the Customer Eligibility Time Delay period, no matter which rule was used when the last message was sent.
   c) Set Allow sending again after X days to the number of days you want to pass before a contact can be sent an email using the same rule.
      For example, if a contact was sent an email using the Product Threshold rule, they will not be sent another email with this rule before this number of days pass. However, the contact can still be sent an email using one of the other rules so you should make sure this setting is fewer days than Do not send the same rule within X days. This lets Browse Recovery send messages that are triggered by other rules and keeps a contact from receiving repetitive email due to the same rule.
   d) Click Next.
4. On the next Sending page, configure your sender options:
Browse Recovery automatically sends messages based on a contact meeting the criteria defined for a rule, so you will need to provide the sender options here instead of on the Send Message page. You need to provide sender options here even if you have set up default sender options for the platform.

a) Enter a **From Name**.

   The from name, also called an alias, is the name that appears to the recipient of the email message.

b) Enter a **From Email**.

   The from address is the email address that your email message will appear from.

c) Enter a **Return Name**.

   The reply address is the address that the application will forward email replies to.

d) Click **Next**.

e) Select **Sender Authentication** if you want to sign your email message with DomainKeys/DKIM.

f) Select **Reply Tracking** if you want to store a copy of all email replies to your email messages on the Email Replies page.

g) Select **Fatigue Override** if you want to Browse Recovery to send email to a contact even when it would exceed the email frequency cap you designated for your contacts.

   Email frequency caps allow you to specify the maximum number of emails that can be sent to your contacts over given time periods. Because Browse Recovery sends emails to contacts based on their behavior, you might want to override the frequency cap setting so that revenue opportunities aren't lost due to the contact already meeting the cap due to regularly scheduled marketing messages.

h) If you want Browse Recovery to be able to send a contact an email while they still have a page on your site open, select **Allow Sending when Browser Idle**.

   This allows you to contact someone if they've left the page open in a tab or window and "forgot" about it. However, it could seem intrusive to receive an email while still on a site, so this option is turned off by default.

i) Click **Next**.

5. Click **Finish**.

---

**Cart Recovery App**

Cart Recovery allows you to identify and capture contacts that have placed items in the shopping cart without completing their order, including cart details.

Working with shopping cart data is a three step process:

1. First, you must configure Bronto's Commerce settings. Commerce settings allow you to pass cart data from your site to Bronto and control how that data is managed. For more information about how to do this see Commerce Settings.

2. Next, you need to configure the Cart Recovery app settings. This sets at what point you want Bronto to consider a cart to be abandoned. For more information see Adjust Cart Recovery App Settings on page 1479.

3. Finally, you can use the cart and order data captured by Bronto to:
   - Add cart and order data into messages. See Cart and Order Tags on page 174.
   - Trigger personalized messages via workflows. See Use The Cart Is Abandoned Trigger Node In Workflows on page 364, Use The Order Is Added Trigger Node In Workflows on page 365, and Use The Order Is Shipped Trigger Node In Workflows on page 365.
   - Create segments. See Commerce Segment Criteria on page 459.

After Cart Recovery is set up and you have successfully sent messages using the Cart Recovery related workflows, you will be able to see statistics on the Overview page of the app.
## Cart Recovery

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reachable Abandoned Carts</td>
<td>The number of carts that have been abandoned (based on the Cary Recovery settings) and have a contact with a valid email address associated with them.</td>
</tr>
<tr>
<td>Reachable Abandoned Revenue</td>
<td>The sum of the Grand Total fields for all of the Reachable Abandoned Carts.</td>
</tr>
</tbody>
</table>

### Related Topics

- **Commerce Settings**
  - Commerce Segment Criteria on page 459
- **Workflow Trigger Nodes** on page 356
  - Triggers nodes represent events that occur in your account which kickoff (or start) a workflow.

### Adjust Cart Recovery App Settings

The Cart Recovery app allows you to identify and capture contacts that have placed items in the shopping cart without completing their order, including cart details.

Using this data you can trigger personalized messages, add cart and order data into messages, and create segments.

The **Settings** page in the Cart Recovery app allows you to configure the time frames and behaviors that determine when a shopping cart is abandoned. You can set shopping cart abandonment to be based on the amount of time that has passed after a contact has left your site and/or the amount of time that has passed since the last item was added to a cart. When a shopping cart meets the criteria you specify on this page, data about that cart is sent back to Bronto.

> **Note:** In order to pass shopping cart data back to Bronto, you need to have the Storefront Settings configured on the **Commerce** page and the Embed Code added to each page on your commerce site. For more information on how to do this, see Commerce Settings.

To configure the Cart Recovery app settings:

1. Go to **Apps > Cart Recovery**.
2. Click **Settings**.
3. To set cart abandonment to be based on the amount of time that passes after a contact has left your website after leaving items in a cart:
   a) Click the checkbox next to **A cart is abandoned if there has been no activity for X time**.
   b) Click on **X time** and set the length of time you want to pass the cart is considered abandoned.

   You can choose to set an amount of time in minutes, hours, or days. We recommend setting this to 15 minutes.

4. To set cart abandonment to be based on the amount of time that passes after the last item was added to a contact's cart:
   a) Click the checkbox next to **A cart is abandoned if there has been no update to the cart for X time**.
   b) Click on **X time** and set the length of time you want to pass before the cart is considered abandoned.

   You can choose to set an amount of time in minutes, hours, or days. We recommend setting this to 30 minutes.

5. Click **Save Changes**.
**Cart Recovery Workflow**

You can use workflows strategically to improve the effectiveness of your cart recovery campaigns. Cart recovery messages must be triggered by a workflow that uses the *Cart Is Abandoned* trigger node.

**Table 35: Useful nodes for Cart Recovery workflows**

<table>
<thead>
<tr>
<th>Node Name</th>
<th>Node Type</th>
<th>How to Use It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cart Is Abandoned</td>
<td>Trigger node</td>
<td>This trigger node is required if you are going to send messages for Cart Recovery. You can exclude contacts who have placed an order during a certain time frame from receiving messages from this cart recovery series.</td>
</tr>
<tr>
<td>Send Email</td>
<td>Action Node</td>
<td>Make sure your <em>Send Email</em> nodes are associated with your Cart Recovery campaign. The first message in your series can be a transactional message. The next messages in your series must be marketing messages and your contacts will only receive them if they have opted-in to receive messages.</td>
</tr>
<tr>
<td>Delay</td>
<td>Action Node</td>
<td>The <em>Delay</em> node lets you determine how long you want to wait after sending your first message, to send a second cart recovery message. For example, you can wait 1 day after the cart was considered abandoned to send a second message.</td>
</tr>
<tr>
<td>Cart Status</td>
<td>Filter Node</td>
<td>Use this node with the <em>Delay</em> action node to check if the cart is still abandoned. If the cart status is <em>Abandoned</em> after your delay, then the second message in your series is sent.</td>
</tr>
<tr>
<td>Contact Field Comparison</td>
<td>Filter Node</td>
<td>Use this node after the <em>Cart Status</em> filter node. If the cart is still abandoned, use this node to check if the contact has placed an order recently. It could be that the contact placed an order over the phone instead, or on a different device. If they have not placed an order, the second message in your series is sent. You can also use this node after the <em>Cart Is Abandoned</em> trigger node to give a coupon to a first-time buyer on your site.</td>
</tr>
<tr>
<td>Node Name</td>
<td>Node Type</td>
<td>How to Use It</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Cart Phase</td>
<td>Filter Node</td>
<td>Use this node to determine when the contact abandoned the cart. For example, if the cart was abandoned during the checkout phase or the shopping phase, you can send a different message.</td>
</tr>
<tr>
<td>Cart/Order Field Comparison</td>
<td>Filter Node</td>
<td>Use this node after the Cart Is Abandoned trigger node to filter based on the cart. For example, you can decide to only send cart abandonment emails to contacts whose cart total is greater than $25.</td>
</tr>
<tr>
<td>Line Item Comparison</td>
<td>Filter Node</td>
<td>You can use this node after the Cart Is Abandoned trigger node to filter on the contents of the cart and even the products. For example, you can send a unique experience for a certain category of products or for a specific SKU.</td>
</tr>
<tr>
<td>Segment Membership</td>
<td>Filter Node</td>
<td>Use this node after the Cart Is Abandoned trigger node to filter specific segments that will receive a specific cart abandonment message. For example, you could send a coupon to your VIP segment.</td>
</tr>
<tr>
<td>Random</td>
<td>Filter Node</td>
<td>You can use this node to test your campaign to see if you need to send an offer code to get your contacts to convert.</td>
</tr>
</tbody>
</table>

For more tips on using workflows with your cart recovery campaigns, see our Rescue Revenue With Cart Recovery webinar.

**Coupon Manager App**

Coupon Manager is an easy way to generate unique coupon codes and keep track of the coupon codes you use in your marketing campaigns.

**Important:** If you do not have the Coupon Manager app and would like information about purchasing it, see Bronto's App Center or contact your account manager.

Coupon Manager manages coupon codes using campaigns. A campaign is a set of rules and design elements that are applied to a group of coupon codes. To use Coupon Manager, you will:

- Set up global configuration rules
- Create campaign tags that can be used for list management and reporting
- Configure campaigns
- Associate coupon codes with campaigns
- Optional: Configure a connection between Coupon Manager and your site so that coupon manager can track and report on redemptions
Once these items are accomplished, you can use Coupon Manager to add coupon codes to your messages and, optionally, to track coupon code redemptions. Coupon validation is managed by your site and is not configured in coupon manager.

Create Coupon Manager Campaigns

A campaign is a set of rules (both configuration and design) that are applied to a group of coupon codes.

Campaign configuration includes setting up expiration, redirect, notification, and uniqueness rules so it is a best practice to set up a unique Coupon Manager campaign for each marketing campaign you want to use coupon codes with. This allows you to easily match the rules for your campaign to your marketing objectives and to track and compare metrics for each of your campaigns. Coupon codes appear in your message as HTML images, so you need to design the appearance of the coupon code and the depleted and expired messages as part of creating a campaign.

After you have created your campaign, you will still need to associate coupon codes with the campaign.

1. Go to Apps > Coupon Manager.
2. Click Create Campaign.
3. Enter a name for the campaign in the Campaign box.
   You will use the campaign name when you add a coupon to an email, but your contacts will not see this name in the messages they receive.
4. Enter a description for the campaign in the Description box.
   This should allow your account users to quickly identify the differences between the various campaigns for your account.
5. Enter the tag you want to use for the campaign in the Tag box.
   If you want to use an existing tag, select it from the list. The tag is used for reports, so make sure you only reuse tags when you want to combine report metrics.
6. Click Create Campaign.
   The Coupon Manager Campaign Design page is displayed.
7. Configure your campaign settings:
   You can edit these settings at a later time by clicking the edit button for the campaign you want to change.
   a) Click the Configuration tab.
   b) Set the expiration date rules:
      • Click the Coupon Expiration Date box and select a specific date from the calendar in order to set coupons to expire on a specific day.
      • Set a number of days in the Rolling Expiration (in days) box if you want contacts to have a certain length of time to redeem a coupon.
      A rolling expiration starts from the time a message was opened by a contact. For example, if you set this number to 8, a contact will have 8 days from the time they opened your message to redeem the coupon. After 8 days, the contact will see the coupon expired message instead of the coupon code. This value overrides any specific expiration date that was set, so leave it set to zero if you only want your coupon codes to expire on a specific date.
   c) Select how you want coupon code uniqueness to be managed:
      • Contact and Delivery means a contact will receive a unique coupon code for each delivery of a message they receive. You might want to use this option if you plan on sending multiple messages in a campaign and have set your coupon codes to a short expiration period.
      • Contact and Message means a contact will receive the same coupon code for every delivery of a message. You might want to use this if you plan on sending the same message several times and do not want a contact to be able to receive and redeem multiple coupon codes.
      • Contact only means a contact will receive the same coupon code for every message and delivery that uses this campaign. You might want to use this if you plan on using a variety of messages in your campaign and do not want a contact to be able to receive and redeem multiple coupon codes.
d) If you want to use a redirect when a contact clicks on your coupon, enter the query parameter to be appended to the redirect URL in the **Redirect Query Parameter for Coupon Code** box.

A common use case is to setup a redirect URL that can accept the coupon query parameter and automatically apply the coupon code for the customer. This could allow you to wrap your image in a link so that if the user clicks on the coupon image, or another call to action in their email, the code is automatically applied in their shopping cart.

e) If you plan to use a redirect, enter the query parameter to be appended to the redirect URL if a coupon already expired in the **Redirect Query Parameter for Invalid Coupon** box.

The redirect URL can be used to send contacts to a particular URL when they click on the coupon code. The query parameter provided here ensures the contact is redirected to the version of the URL you have set up for expired coupons.

f) To receive notifications when the campaign is running low on coupon codes, enter the number of remaining coupon codes in the **Notify Me When There Are Less Than X Codes Remaining** box.

g) Enter the email address you want notifications sent to in the **Send Email Notification To** box.

If you do not enter an email address you will not receive notifications related to coupon depletion.

8. Click the **Design** tab to design your coupon code and messages.

Design determines how your coupon codes and expired and depleted messages look in your messages. You cannot use the message editor to design these elements.

9. Design text-based coupon codes:

For information about designing barcode coupon codes, skip to the next step.

a) If necessary, click **Coupon Code** to reveal the coupon code designer.

b) Enter text in the **Test Code** box that mimics how your coupon codes are formatted.

This allows you to accurately preview what your coupon codes look like.

c) Select **Text** from the **Type** options.

d) Design the text appearance by clicking on or selecting different **Format** options.

The preview text to the right will change as you make selections.

e) If you wish the change the background color for the code, select it from the **Background Color** interface then click choose.

f) If you wish to increase or decrease the size of the box around the code text, increase or decrease the **Padding**.

g) If you want the expiration date to be include with the code text, select **Above** or **Below** from the **Include Expiration Date** list, otherwise set this to **No**.

h) If you selected **Above** or **Below**, design the expiration date.

• Change the **Prefix Label** text so it matches the date format your selected. For example, you might want to change **Expires in** to **Expires on**.

• Select a date format from the **Format** list.

• Design the expiration date text appearance by clicking on or selecting different **Expiration Text Font** options.

10. Design barcode-based coupon codes:

a) If necessary, click **Coupon Code** to reveal the coupon code designer.

b) Enter text in the **Test Code** box that mimics how your coupon codes are formatted.

You have the option of displaying text below the barcode and this will allow you to accurately preview what this will look like.

c) Select **Barcode** from the **Type** options.

d) Select the correct barcode format from the **Barcode Format** list.

For example, if your coupon codes are scannable QR codes then you should select **QR Code** from the list. Setting the barcode option does not translate your coupon codes into barcodes, it tells coupon manager which barcode rendering will be used for the uploaded coupons.
e) Select Yes if you want to include a text-based code with the barcode from the Include Human Readable Text list.

f) To change the orientation for the coupon code display in your message, select Clockwise or Counter-Clockwise from the Rotation list to make the coupon code display vertical.

g) To make the barcode larger or smaller, adjust the Height.

h) Design the text appearance by clicking on or selecting different Format options.

The preview text to the right will change as you make selections.

i) To change the background color for the message, select it from the Background Color interface then click choose.

j) To increase or decrease the size of the box around the text, increase or decrease the Padding.

11. Design your depleted message:
   a) If necessary, click Depleted Message to reveal the designer.
   b) Type the text you want to use in the Message box.
   c) Highlight the text and use the options at the top of the Message box to style it.

   The preview text to the right will change as you make different selections except for text alignment changes. Alignment settings are only visible within the context of a message.

   d) If you wish to change the background color for the message, select it from the Background Color interface then click choose.

   e) If you wish to increase or decrease the size of the box around the text, increase or decrease the Padding.

12. Design your expired message:
   a) If necessary, click Expired Message to reveal the designer.
   b) Type the text you want to use in the Message box.
   c) Highlight the text and use the options at the top of the Message box to style it.

   The preview text to the right will change as you make different selections except for text alignment changes. Alignment settings are only visible within the context of a message.

   d) If you wish to change the background color for the message, select it from the Background Color interface then click choose.

   e) If you wish to increase or decrease the size of the box around the text, increase or decrease the Padding.

13. Click Save & Close.

Create or Upload Coupons

You can either upload coupon codes or use coupon manager to create unique coupon codes.

In order to use a coupon codes in your message, you must create a campaign and associated coupon codes with it.

1. Go to Apps > Coupon Manager.

2. Find the campaign you want to associate codes with in the Campaign list and click its upload coupons icon.

3. To upload coupon codes:

   Coupon codes can only be uploaded from a CSV file.
   a) Click the CSV File Upload tab.
   b) Click Choose File and select the file you want to upload.
   c) If your file includes header rows, select the number of header rows from the Number of Header Rows to Skip list.

      This prevents the header rows from being accidentally provided as a coupon code.
   d) Select the column number that contains the first coupon code you want to use from the Column Containing the Coupon list.

      All unique coupon codes after this column will be used.

4. To generate unique coupon codes:
a) Click the **Generate Coupons** tab.
b) Enter the number of coupon codes you want to create in the **Quantity** box.
   You can only generate up to 200,000 codes at a time. If you need more than 200,000, you can generate coupon codes for your campaign multiple times.
c) Select the desired coupon code character format from the **Format** list.
d) Enter the number of characters you want a coupon code in the **Code Length** box.
e) To include a prefix or a suffix with your coupon code, enter the value in the **Prefix** or **Suffix** box.
   You might want to use a prefix or suffix if you plan to use redeemed coupon codes to build segments.
f) To offset characters in your coupon code with a separator, enter the separator and the desired number of consecutive characters in the **Separator** boxes.

5. Click **Upload Coupons**.

### Test Coupon Codes

Coupon Manager includes a test mode you can use while testing your coupon codes in messages.

The test mode allows you to "force" Coupon Manager to display the desired message in message previews or sent test messages. When you have your campaign in test mode, the coupon codes in your test messages do not count against your coupon code allocation and can be used again when the campaign is set back to normal mode.

1. Go to **Apps > Coupon Manager**.
2. Find the campaign you want to test in the **Campaign** list and click its status icon.
3. Select the testing mode you want to use from the list.
   - Select **Testing > Coupon Mode** to send test messages with a coupon code in it.
   - Select **Testing > Depleted Mode** to send test messages with a depleted message in it.
   - Select **Testing > Expired Mode** to send test messages with an expired mode message in it.
4. Click **Apply**.
5. Using the platform, either preview your message or send test messages.
6. When you are done testing, change to status of the message by clicking status icon and selecting the appropriate status.

### Manage Coupon Codes

You can move or delete unused coupon codes, or download the coupon codes for a campaign to a CSV file.

When you delete or move coupon codes, these codes are no longer associated with the current campaign. Delete and Move actions cannot be reversed.

1. Go to **Apps > Coupon Manager**.
2. Find the campaign you want to manage codes for in the **Campaign** list and click its download coupon icon.
3. To download coupon codes:
   a) Click the **Download** tab.
   b) Select the type of coupon codes you want to download from the **Type** list.
      You can download assigned, unassigned, or redeemed codes. Assigned codes have been sent in a message but have not been redeemed.
   c) Click **Download Coupons**.
4. To move unassigned coupon codes to another campaign:
   a) Click the **Move Unassigned** tab.
   b) Select the campaign you want to move unassigned coupons to from the **Target** list.
      You can only move unassigned coupons to one campaign. Once coupons are moved they are no longer associated with the current campaign and this action cannot be undone.
   c) Click **Move Coupons**.
5. To delete unassigned coupon codes:
   This action cannot be reversed.
   a) Click the **Delete Unassigned** tab.
   b) Click **Delete Coupons**.

**Configure Redemption Tracking**

In order for Coupon Manager to be able to track and report on coupon redemptions, you need to configure the redemption settings and add the redemption JavaScript snippet to your site.

This is optional and not required in order to use Coupon Manager but it allows Bronto to collect the email, coupon, and order data when your contacts redeem a coupon. Both the redemption settings and the redemption JavaScript snippet can be found by clicking the **Redemption Settings** icon in the Coupon Manager app.

When you enable Coupon Manager by enabling the redemption settings, the following contact fields are added to your Bronto account:

- Coupon Manager Total Revenue
- Coupon Manager Total Discount
- Coupon Manager Last Code
- Coupon Manager Last Redemption Date
- Coupon Manager Total Redeemed
- Coupon Manager Most Used Tag
- Coupon Manager Tags Redeemed
- Coupon Manager Codes Redeemed

and these fields can be used in the same ways any other contact fields are used in the platform. For example, you could use the Coupon Manager Last Redemption Date to create a segment of contacts who have not redeemed a coupon code in the last 90 days. Additionally, when a coupon is redeemed, the `CouponManager_Redeemed` API event is recorded. Any workflows that start with the Received API Event trigger node using the `CouponManager_Redeemed` keyword can be triggered by this event.

If you want to target these workflows to specific coupon codes, you could also use the Contact Field Comparison filter node with the Coupon Manager Codes Redeemed contact field or the Coupon Manager Tags Redeemed contact field to target the workflow.

1. Go to **Apps > Coupon Manager**.
2. Click **Redemption Settings**.
3. Select **Yes** from the **Enabled** list.
   When this is set to **No** the coupon codes generated by Coupon Manager cannot be redeemed on your site.
4. Select the correct currency for your account from the **Currency** list.
   Currently Coupon Manager supports US dollars, UK pounds, and Euros.
5. Add the redemption JavaScript snippet to your site:
   a) Click **Redemption JavaScript Snippet**.
   b) Copy the script provided, including the opening and closing `<script>` tags, and paste it into a code editor.
      You will need to update the variables provided in the script before adding it to your site.
   c) Remove any variables you do not want Bronto to collect.
      Your variables are email, coupon, orderID, orderSubtotal, orderDiscount. Email and coupon are required variables but the rest are optional. Bronto cannot collect the data associated with any variable you delete.
   d) In your list of variables, replace `<value-or-selector-definition>` with the appropriate CSS selector used to identify this data on your site and, if relevant, an optional attribute.
e) After you have updated the code snippet so that it is accurate for your site, copy the code and insert the snippet into your web page following a successful checkout.

**Work With Coupon URLs**

Coupon Manager provides the ability to quickly and easily access the image URL and HTML tag text for a campaign so that you can copy and paste into your messages.

You also have the option to configure an embeddable URLs that can be used to redirect contacts to a specific site location when the URL is included in the message. The most common use case for a redirect URL is to redirect contacts to your site with the coupon code automatically applied.

1. Go to Apps > Coupon Manager.
2. Locate the campaign you want to work with and click its Get HTML button.
3. To copy the image URL:
   a) Click the Image URL tab.
   b) Copy the text in the box.
   c) Paste the image URL into your message.
4. To copy the HTML Tag:
   a) Click the HTML Tag tab.
   b) Copy the text in the box.
   c) Paste the HTML Tag into the HTML for your message.
5. To set up an embeddable redirect:
   a) Click the Redirect URL tab.
   b) Enter the redirect path in the Target URL box.
   c) Copy the generated URL and paste it into your message.
   d) Click Save.

**Archive Coupon Manager Campaigns**

Coupon Manager campaigns cannot be deleted but they can be archived so they are hidden from the list of active campaigns. This allows you to manage your list of active campaigns without breaking any coupon codes you may have already sent out.

When you archive a campaign you are performing a soft delete. All of the metrics associated with the campaign are retained, but the campaign will no longer show up in the app unless you filter your campaign list to view campaigns with an archived status. When you archive a campaign that has been used, you should set the status of the campaign as you archive it so that any coupons associated with the archived campaign are managed properly.

1. Go to Apps > Coupon Manager.
2. Find the campaign you want to manage codes for in the Campaign list and click its status icon.
3. Select the Archived status you want to apply to the campaign:
   • Archived Normal - all coupons associated with this campaign will show the normal coupon code as long as codes are not depleted or expired.
   • Archived Coupon Mode - all coupons associated with this campaign will show a test coupon code.
   • Archived Depleted Mode - all coupons associated with this campaign will show a depleted message.
   • Archived Expired Mode - all coupons associated with the campaign will show an expired message.
4. Click Apply.

**Coupon Manager Reports**

Coupon Manager provides reports you can use to view the effectiveness of your campaigns.

Coupon Manager has three types of reports.
**Campaign Reports**

Campaign reports display the redemption and revenue metrics for a specific campaign. You can access a campaign report by clicking the report icon associated with a specific campaign.

**Account Reports**

The account report displays the aggregate redemption and revenue metrics for all of the Coupon Manager campaigns in your account. You can access this report by clicking the view reports icon, then clicking Account Report.

**Comparison Reports**

Comparison reports allow you to create a report that compares the success of different campaigns and tags. To create a comparison report:

1. Click the view reports icon.
2. Click Comparison Report.
3. Click in either the Add Campaigns or Add Tags box and add the items you want to compare.
4. Click either the Add Campaigns or Add Tags button to add the items to the report.

**Upload Coupon Manager Codes Using Data Loader**

You can use Data Loader to upload Coupon Manager codes that you can use in your Coupon Manager campaigns.

In order to use this Data Loader feature, you must also have the Coupon Manager app. When you create an import job that uploads coupon codes, you are asked to associate the upload with a particular Coupon Manager campaign. Therefore, if you want to upload codes for multiple campaigns you need to configure a separate Data Loader import for each campaign. As long as you use the same filename matching pattern for each import, you will be able to upload coupon codes for each campaign from the same file or set of files.

To add or update contacts:

1. Go to Tables > Data Loader.
2. Click Create Import.
3. Enter the relevant information in the Create Import Job window.
   a) Enter a name for the import in the Name box.
   b) Enter a description for the import in the Description box.
      The description is a good way to distinguish between similar imports.
   c) Select Upload Codes from the Type list.
   d) Click Create Import Job.
4. Click Upload Sample File To Begin Mapping to map the categories in your file to fields in Bronto.
   This lets Bronto know how to appropriately manage your data as it is imported. For Upload Codes the only available field you can map is Coupon Code.
5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   • Pipes |
   • Commas ,
   • Semicolons ;
   • Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the Upload Sample File window, select Upload a file.
   b) Select your file from the Files list.
c) Click **Upload Sample File**.

If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.

7. If you have transferred a file to the server that you want to map data for:
   a) In the **Upload Sample File** window, select **Select one of the files in your account**.
   b) Click **Choose File**, select your file in the finder window, then click **Open**.
   c) Click **Upload Sample File**.

If the file upload is successful, the mapping page will be displayed.

8. On the mapping page, select **Coupon Code** from the **Mapped to** list.

9. On the **Configuration** tab in the **General** area, configure the general settings for your import:
   a) Select **Yes** or **No** in the **Skip First Row Header** list.
   b) Select **30 days** or **3 days** from the **Cleanup Schedule** list.

   This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.

   c) Select the method you want Bronto to use for filename matching from the **Filename Matching Scheme** list

   - **Ends with** will match files based on the extension specified for the **Filename Matching Pattern**. Only use **Ends with** when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, **Custom Glob** is the best choice.

   - **Starts with** will match files based on the characters specified for the **Filename Matching Pattern** starting with the first character. For example, if you have contact for the **Filename Matching Pattern** then all files on the FTP server that start with the word contact will attempt to be imported.

   - **Custom Glob** will match files based on the characters and the extension specified for the **Filename Matching Pattern**. This allows you to use wildcards in order to build more complex import queries.

   d) Enter a full or partial filename in the **Filename Matching Pattern** box.

   This is used in conjunction with the **Filename Matching Scheme** to recognize what files on the FTP server should be imported using this import job. If you use the **Custom Glob** option for **Filename Matching Scheme** you can use wildcards. Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.

   e) If you want to receive an email notification when your imports complete, enter an email address in the **Confirmation Email** box.

   The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In **Expected Data Format**, select the delimiter for your file from the **Delimiter** list.

11. In **Bronto Settings**, select the Coupon Manager campaign you want to associate the coupon codes with from the **Coupon Manager Campaign** list.

12. When you have finished import configuration, click **Save & Close**.

13. If you haven't already, **Transfer Your Files to the FTP Server**.

14. Find the import you just configured and **Perform a Test Run** to ensure that the files are valid.

   Based on the results of the test run, fix any issues as necessary.

After the import has run, you can **Data Loader Reports** on page 1182 to see details about your import.

**Related Topics**

*Transfer Files To FTP Server For Data Loader* on page 1168

Before Data Loader can import a file you must transfer your files to the FTP server that Bronto configured for you. This is done outside of Data Loader.
Redeem Coupon Manager Codes Using Data Loader

You can use Data Loader to redeem Coupon Manager codes.

In order to use this Data Loader import, you must also have the Coupon Manager app. When you use the Redeem Coupon Codes import, you can also update order data related to the order the coupon code was used for.

To redeem codes:

1. Go to Tables > Data Loader.
2. Click Create Import.
3. Enter the relevant information in the Create Import Job window.
   a) Enter a name for the import in the Name box.
   b) Enter a description for the import in the Description box.
      The description is a good way to distinguish between similar imports.
   c) Select Redeem Codes from the Type list.
   d) Click Create Import Job.
4. Click Upload Sample File To Begin Mapping to map the categories in your file to fields in Bronto.
   This let's Bronto know how to appropriately manage your data as it is imported.
5. In the Upload Sample File window, select the delimiter used in your file from the Delimiter list.
   The delimiter is the character that is used to offset, or indicate, unique pieces of information in your file. For example, if there is a comma between the fields in your file, then your file uses a comma as a delimiter. Data Loader supports:
   • Pipes |
   • Commas ,
   • Semicolons ;
   • Tabs
6. If you have not transferred your file to the server, upload the file as a sample file so you can use it to complete the import mapping:
   a) In the Upload Sample File window, select Upload a file.
   b) Select your file from the Files list.
   c) Click Upload Sample File.
   If the file upload is successful, the mapping page will be displayed. This does not upload the file to the FTP server or import the data into Bronto. You will still need to complete a file transfer and configure your import for that to occur.
7. If you have transferred a file to the server that you want to map data for:
   a) In the Upload Sample File window, select Select one of the files in your account.
   b) Click Choose File, select your file in the finder window, then click Open.
   c) Click Upload Sample File.
   If the file upload is successful, the mapping page will be displayed.
8. On the mapping page, map the values in the file by selecting a value from the Mapped to list.
   Make sure you map the Coupon Code to the coupon code in the file and map other order details as appropriate. At a minimum you must map a coupon code and an email address.
9. On the Configuration tab in the General area, configure the general settings for your import:
   a) Select Yes or No in the Skip First Row Header list.
   b) Select 30 days or 3 days from the Cleanup Schedule list.
      This determines if you want the files to persist on our servers for the minimum of 3 days or the maximum of 30 days.
   c) Select the method you want Bronto to use for filename matching from the Filename Matching Scheme list
• **Ends with** will match files based on the extension specified for the Filename Matching Pattern. Only use **Ends with** when this your only import that uses this file type and you are only submitting one type of file for this import. If you have multiple Data Loader import jobs and want the file extension taken into consideration, **Custom Glob** is the best choice.

• **Starts with** will match files based on the characters specified for the Filename Matching Pattern starting with the first character. For example, if you have **contact** for the Filename Matching Pattern then all files on the FTP server that start with the word contact will attempt to be imported.

• **Custom Glob** will match files based on the characters and the extension specified for the Filename Matching Pattern. This allows you to use wildcards in order to build more complex import queries.

d) Enter a full or partial filename in the Filename Matching Pattern box. This is used in conjunction with the Filename Matching Scheme to recognize what files on the FTP server should be imported using this import job. If you use the **Custom Glob** option for Filename Matching Scheme you can use wildcards. Make sure the information you include here is specific enough that the import job won't attempt to import files on your FTP server location that are intended for other import jobs you may have configured. But also keep the filename general enough that the import will be able to import multiple files with slightly different names if your import requires using multiple files.

e) If you want to receive an email notification when your imports complete, enter an email address in the Confirmation Email box.

The notification email contains high-level information about the import and includes a link to download a run log that contains any errors the import may have.

10. In the Expected Data Format area, configure how you want the data in your file to be managed as it is imported:

a) Select a delimiter from the Delimiter list.

b) If you plan to import date-based data, click the calendar icon under Date Format and fill in the options in the Date Format Builder window.

You must map a date-based field before you can configure Date Format. In the Date Format Builder, select a data from the Example Date & Time list, click Go, then click on each number in the date to select whether it is a Day, Month, or Year, and then click Done.

c) Select a currency type from the Locale list.

The currency should match the Locale setting you have set for your Bronto account. For more information see Formatting Settings.

11. In the Bronto Settings area, enter the list name in the Add Contacts to Specified Lists box if you want to add contacts to a list as they are imported.

12. When you have finished import configuration, click Save & Close.

13. If you haven't already, Transfer Your Files to the FTP Server.

14. Find the import you just configured and Perform a Test Run to ensure that the files are valid.

Based on the results of the test run, fix any issues as necessary.

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**Pop-Up Manager**

Pop-Up Manager is used to design pop-up messages that can capture the email addresses of people who visit your site.

**Important:** If you do not have the Pop-Up Manager app and would like information about purchasing it, see Bronto's App Center or contact your account manager.

With Pop-up Manager you can design pop-ups and ribbons. A pop-up is a form that site visitors can enter contact information into. When the pop-up is submitted, this information is passed to Bronto as contact data. Pop-ups are an easy way to quickly and easily manage your list growth by turning site visitors into Bronto contacts. Additionally, you know these contacts are engaged and interested in your marketing promotions.
A ribbon is a banner attached to the top of your page that contains a single line of text that serves as a call to action. Clicking on a ribbon opens your pop-up so that a site visitor can submit their information. Ribbons are less intrusive than pop-ups on mobile devices and provide an easy way to access a pop-up again after it has been dismissed.

To use Pop-up Manager you need to connect Pop-up Manager to your site, design and configure your pop-ups and ribbon, and activate the pop-ups so they can be displayed on your site.

**Configure Pop-Up Manager**

Before pop-ups can display on your site, you need to provide the domain for your site and embed the Pop-Up Manager code in your site's code.

Providing the domain and adding the code creates a connection between Pop-Up Manager and your site so that the currently active Pop-Up can be displayed on your site. When you provide your domain, you should only provide your domain name, or a subdomain, not the URL for your site. For example your domain name is `mysite.com` but your domain URL is `http://www.mysite.com/`.

Your pop-up will not appear on your site until it is activated.

1. Go to **Apps > Pop-Up Manager**.
2. Provide your domain name:
   a) Click **Update Domain**.
   b) Paste the domain name in the **Domain** box.
   If you only want the pop-up to appear on a certain area of your site, enter the subdomain for these pages instead of the site's primary domain.
   c) Click **Update Domain**.
3. Embed the pop-up manager code on your site:
   a) Click **Script Tag**.
   b) If you use Google Tag Manager, click on the **Google Tag Manager Script** tab and copy the text in the box.
   c) If you do not use Google Tag Manager, copy the text in the **HTML Script Tag** box.
   d) Paste the script you copied in the appropriate place related to your site.
   We recommend placing the script in the footer of your site. Make sure that you have either the script tag or the Google tag manager approach deployed on your site. If both appear on the page, a conflict can occur causing both pop-ups to deploy, and only one to close.
   e) Click **Close**.

**Create Pop-Ups**

Pop-up creation includes setting the rules that determine who sees the pop-up - and when these contacts see it - in addition to designing the pop-up.

There is no difference in the process for creating a mobile pop-up versus a normal pop-up, though you will want to use the appropriate design principles for each. For example, the width of a mobile pop-up should be targeted for mobile devices.

After a pop-up is created, it must be activated in order to be displayed on your site. There is currently no limit to the number of pop-ups you can create, but you can only have one active pop-up type per domain, expect when you have a mobile and non-mobile version of a pop-up and/or are A/B testing your pop-ups.

1. Go to **Apps > Pop-Up Manager**.
2. Click **Create Version**.
3. Enter a name for the pop-up in the **Name** box.
4. Select whether you want a normal or mobile template to start with from **Template** list.
5. Click **Create Version**.
6. Click the **Configuration** tab.
7. Configure pop-up's display settings:
a) Click **Display Triggers**.
b) Enter the number of times you want a contact to visit the site before seeing the pop-up in the **Display After X Visits** box.
c) If you want to delay the pop-up until after a contact clicks on a page, enter the desired number of clicks in the **Display After X Clicks** box.
d) If you want to set a time-based delay, enter the number of seconds in the **Display After X Seconds** box.
e) If you want this pop-up to only display on certain areas on your site, specify the path in the **Include URL Paths** box.

You only need to provide the path on the domain or subdomain you specified in your configuration settings. Offset multiple paths with a comma. For example, you might want a pop-up only to appear on your product pages, so you would include /product/ here. Any page with product in the path would now show the pop-up.

f) If you want to prevent the pop-up from being displayed on certain pages, enter their path(s) in the **Exclude URL Paths** box.

8. Configure pop-up's cookie settings:

a) Click **Cookie Policies**.
b) Select whether you want your cookies to be associated with the domain or with the pop-up using the **Cookie Uniqueness** list.

Pop-up Manager uses this cookie to determine whether or not the activated pop-up is displayed. The default behavior is **Domain** setting, which writes the cookie for the entire domain so multiple activated pop-ups use the same cookie. You may decide that multiple pop-ups need to be displayed at different times on the same domain, and that's when you would use the **Pop-up** setting.

c) Enter the number of days you want to pass before a contact will see a dismissed pop-up again in the **Display Again X Days After Opt-Out** box.

d) Enter the number of days you want to pass before a contact will see the pop-up again after providing information in the **Display Again X Days After Opt-In** box.

This is useful when you want to use variations of the same pop-up for seasonal campaigns.

e) If you also use conversion tracking, indicate whether you want this pop-up to display if the conversion tracking cookie is present by selecting **Yes** or **No** from the **Display If Bronto Cookie Present?** list.

f) If you want to create a submission cookie, select **Yes** from the **Create Bronto Cookie After Submission?** list.

9. Configure the platform settings:

a) Click **Bronto Settings**.
b) Select the status you want contacts who submit the pop-up to be given in Bronto from the **Add Contacts With The Following Status** list.

c) Select the lists you want contacts to be added to:

You do not need to select a list for every option provided. Only select lists for the options you want to use.

- **Master List For** is the list contacts who submit any pop-up are added to.
- **List For Version** is the list contacts who submit this pop-up are added to.
- **List For A/B Testing** is the list contacts who are part of an A/B test of this message are added to.
- **Other List** is a random list you can add contacts to when they submit the pop-up.

d) If you want to pass any additional contact data to Bronto, select a contact field from the **Set Hidden Field** list and enter the field value in the **Hidden Field X Value** box.

For example, if your pop-up is related to baseball you might want to select the contact field Sport and enter baseball in the **Hidden Field Value** box. This will populate baseball into the Sport contact field for any contact who submits this pop-up.

10. Click the **Design** tab to design your pop-up.

Each pop-up has a main page and a confirmation page that you can style. The template you selected provides a baseline pop-up that you can customize.

11. Click **Background** and design the background for your message:
a) Use **Canvas Width** and **Canvas Height** to adjust the size of canvas the pop-up is on.
   
   You can use the canvas to place the close button for the pop-up outside of the pop-up's design.

b) Use **Width** and **Height** to adjust the size of the pop-up.

c) Use the **Border** settings to design a border for the pop-up's body.
   
   If you do not want a border, set this to 0.

d) Use **Border Radius** to control whether or not your pop-up has rounded edges.

e) To include your logo, click the **Logo Image** folder icon and upload your logo.
   
   You cannot adjust the size of the logo once it is uploaded, so do any image editing outside of Pop-Up Manager before uploading an image.

f) Either select a background color from the **Background Color** list or upload a background image by clicking the **Background Image** folder icon and upload your image.
   
   If you uploaded a background image, set how you want the image to be displayed using the **Background Image** lists.

12. Click **Text Elements** to add and design the text used in the pop-up:
   
a) Highlight the text currently in the **Title** box and replace it with the new text you want to be the main text in your pop-up.

b) Make sure the text is highlighted then use the formatting options in the banner of the **Title** box to style the text.

c) Highlight the text currently in the **Subtitle** box and replace it with the new text you want to be the secondary text in your pop-up.
   
   Having subtitle text is optional.

d) Make sure the text is highlighted then use the formatting options in the banner of the **Subtitle** box to style the text.

e) To reposition the text, click on the text in the canvas and move the text around.

13. Click **Input Fields** to configure and style the input boxes for the pop-up.
   
   Email is always provided as a default input field because it is required, but you can add other input fields as needed.

   a) If you want to add additional input fields to your pop-up, click the plus button, select the field from the list of fields, and click **Add Field**.

   b) To style a field, make sure the field is selected in the **Selected Input** list.

   c) To change the default text, enter new text in the **Contextual Text** box.

   d) Use **Width** and **Height** to adjust the size of the input box.

   e) Use the **Font** options to style the input text.

   f) If you added a new field, indicate whether or not it must be filled out before the form is submitted using the **Required** box.

   Optionally, include a default value to pass to Bronto if the input field is left blank in the **Default** box.

14. Click **Preferences** to add and configure an opt-in checkbox for marketing messages.
   
a) Select Yes for **Add Checkbox?** to have a checkbox appear on your pop-up. Customers will be required to check the box to successfully submit the form.

b) Select Yes for **Checked By Default?** to have the checkbox automatically checked when the pop-up loads.

c) Add a **Label** that will display next to the checkbox.

   d) Use **Label Font** to customize the display of your **Label** text.

   e) Add an **Error Message** that displays when a customer tries to submit the pop-up without checking the checkbox.

   f) Use **Error Message Font** to customize the display of your **Error Message** text.

15. Click on **Submit Button** and design the pop-up's submit button.
   
a) To change the default text, enter new text in the **Text** box.

   b) Use **Width** and **Height** to adjust the size of the button.
c) Use the **Border** settings to design a border for the button.
   If you do not want a border, set this to 0.

d) Use **Border Radius** to control whether or not your pop-op has rounded edges.

e) Use the **Font** options to style the button text.

f) Use **Background Color** and **Hover Background** to set the button's colors, or use **Background Image** and **Hover Background Image** to use images for the button.
   If you use images, you might not want to also use button text.

16. Click on **Close Links** and design the pop-up's close button and text.
   a) Select the design for the close button from the **Icon Style** list.

   b) If you'd like to include a link someone can click to close the pop-up, enter text in the **Link Text** box.

   If you provide link text, style the text using the **Link Font** options.

17. Click on **Confirmation Page** to configure what happens when the pop-up is submitted and/or design the pop-up confirmation page.
   a) Select what you want to happen when the pop-up is submitted from the **Behavior** list.

      • **Close Pop-up after submission** removes the pop-up and does not display anything else on the page.

      • **Redirect to a specified URL** opens the provided URL in the same window.

      • **Display HTML Content Within Pop-up** displays a confirmation pop-up that can be dismissed.

   b) If you selected **Redirect to a specified URL** enter the URL in the **URL** box.

   c) If you selected **Display HTML Content Within Pop-up**, style the confirmation pop-up using the same type of options you used to style the main pop-up.

18. When you are happy with the pop-up design and settings, click **Save & Close**.

### Create A Pop-Up Dynamic Ribbon

You can use Pop-Up Manager to design and display a call to action ribbon that can be used to access your pop-ups.

When implemented, the ribbon is displayed at the top or bottom of a page. Clicking on the ribbon will display the pop-up.

There are several advantages to using a ribbon instead of just displaying a pop-up:

• Providing a ribbon instead of a pop-up greatly improves the mobile user experience for your customers. A ribbon is a non-intrusive banner at the top of your page while, on mobile, a pop-up often covers most of what someone is trying to see.

• Google changed the mobile pop-up game and using a ribbon can help prevent your pop-ups from hurting your mobile SEO score.

• When a user discards the pop-up, the ribbon will continue to be displayed at the top of the page. This provides continuous access to the pop-up until it has been submitted.
You can only create and design one ribbon each, for mobile and desktop, but you can choose when and how to use the ribbon when you activate the pop-up. During activation you can use the ribbon for mobile and/or desktop and indicate whether the ribbon will be displayed initially or only displayed if the pop-up is dismissed. For things like display triggers and cookie usage, the ribbon will use whatever settings you configured for the pop-up.

1. Go to Apps > Pop-Up Manager.
2. Click Create Ribbon.
3. Enter a name for the dynamic ribbon in the Name box and click Create Ribbon.
4. Choose to create a mobile or desktop ribbon.
   
   Note: Both the mobile and desktop ribbon will have the same name.

5. Click Ribbon Setup.
   
   a) Choose the Position of the ribbon.
      
      • Pinned-Page Top: The ribbon stays pinned to the top of the webpage and scrolls up/down with the webpage.
      • Floating-Page Top: The ribbon stays at the top edge of the browser window and does not scroll up/down with the webpage.
      • Floating-Page Bottom: The ribbon stays at the bottom edge of the browser window and does not scroll up/down with the webpage.
   
   b) Choose the Height for your ribbon.
      
      For a mobile ribbon, you can only choose a dynamic height. For a desktop ribbon, you can choose a dynamic or a static height.
      
      Note: Dynamic height can only be set to between 1% and 10% of the screen size.

6. Click Background to configure the ribbon's border, background color, and arrow settings:
   
   a) Select a color for the Background.
   b) Set a Border Radius.
      
      The border radius controls how rounded the corners of the ribbon are. The larger the border radius the more rounded the corners will appear.
   c) Select whether or not to Show Arrow.
      
      The arrow serves as a visual indicator that a ribbon click provides more content without redirecting visitors to another page, but the arrow is not required.
   d) If you set Show Arrow to yes, select an Arrow Color.

7. Click Text Elements to configure the ribbon's text:
   
   a) Enter the ribbon's text in the Title box.
   b) Select a text color, font, and styling from the Title Font options.
   c) Select a Title Size.
      
      Note: If you are creating or editing a desktop ribbon and you have static height selected in the Ribbon Setup section, you will select your text size in pixels.

8. Click Close Links.
   
   a) Select a Position for the close link.
   b) Select a Close Link Color to set the color of the close button.

9. Click Preview to see how your ribbon will look on different desktop sizes or mobile devices.
   
   If you are not happy with how your ribbon looks, you can click Discard Changes and choose to revert to the default ribbon or to the last saved version of your ribbon.

10. When you are happy with the ribbon's design and settings, click Save & Close.

Activate a Pop-Up

Pop-ups need to be activated in order to show up on your site.
The pop-up activation window is divided into three areas. The area furthest to the left contains configuration settings. This is where you can turn on A/B testing, indicate if you want to display a different pop-up version on mobile devices, and set the screen width at which the desktop version of a pop-up is displayed. The next two areas, Version - A and Version - B, are where you select the pop-up(s) you want to use and indicate whether or not to initially display the dynamic ribbon or the pop-up.

What you can configure for Versions A and B change based on the configuration settings to the left. For example, if A/B Testing is OFF you cannot configure Version - B. Or, if you have not designed a dynamic ribbon you cannot select a Ribbon option.

Before you activate a pop-up, make sure you have configured pop-up manager and have set up and designed your pop-up(s) appropriately. As soon as you activate a pop-up it will display on your site.

1. Go to Apps > Pop-Up Manager.
2. Click Activate.
3. Optional: If you want to A/B test your pop-ups set A/B Testing to On.
4. Optional: If you want your pop-ups to display differently on mobile:
   a) Set Mobile Version to On.
   b) Enter the largest screen width and height, in px, that you want a mobile pop-up to display on in the Max Mobile Width and Max Mobile Height boxes.

   For example, most mobile phones have a width of 480 px or smaller and a height smaller than 750 px. So, if you wanted to use mobile pop-ups on a phone but not tablets or desktop devices, entering a Max Mobile Width of 480 and a Max Mobile Height less than 750 would accomplish this. But if you also want to use mobile pop-ups on a tablet, you need to set the mobile width and mobile height so that they are larger than the width and height of the tablet screen.

   Note: The desktop version will display only if both the Max Mobile Width and Max Mobile Height are smaller than the screen size of the device.
5. Under Version - A and Desktop:
   a) Select the pop-up you want to display on desktop devices from the Pop-up list.

   Note: You cannot select the same pop-up for desktop and mobile. If you want the pop-up to look the same, create a copy of the pop-up you want to use and rename it to use it either as a mobile or a desktop version.
   b) Select an option from the Ribbon list.

      • Select Do Not Display if you do not want to use a ribbon.
      • Select Display Ribbon First if you want the dynamic ribbon to be what is initially displayed during a page visit.

      When you select this, the pop-up is only displayed when the ribbon is clicked. If the pop-up is dismissed, the ribbon will be displayed at the top of the page until the ribbon is closed or the contact completes the pop-up sign up process.

      • Select Display Pop-up First if you want the pop-up to be what is initially displayed during a page visit.

      When you select this, the ribbon is displayed if the pop-up is dismissed. If a contact completes the sign up process using the pop-up, the ribbon is not displayed.
   c) Enter the maximum device width you want to display the mobile pop-up on in the Max Mobile Width box.
6. Optional: If you are using a mobile pop-up version under Version - A and Mobile:
   a) Select the pop-up you want to display on mobile devices from the Pop-up list.

   Note: You cannot use the same pop-up for desktop and mobile.
   b) Select an option from the Ribbon list.

   For mobile, we recommend using Display Ribbon First to minimize the impact of Google's new mobile SEO policies.

      • Select Do Not Display if you do not want to use a ribbon.
• Select **Display Ribbon First** if you want the dynamic ribbon to be what is initially displayed during a page visit.
• Select **Display Pop-up First** if you want the pop-up to be what is initially displayed during a page visit.

7. If you turned on A/B testing, repeat steps 5 and 6 for **Version - B Desktop** and, if applicable, **Mobile**.
   While you cannot A/B test different versions of a ribbon, you can A/B test pop-up engagement based on whether the ribbon is displayed first vs displaying the pop-up first or engagement based on having a ribbon vs not using a ribbon. Keep in mind that using different pop-up versions can also affect engagement and keep what you choose to test simplified.

8. **Click Activate.**

---

**Socialite**

Socialite allows you to connect your Bronto contact data to your social media accounts in order to drive list growth and revenue.

**Important:** If you do not have the Socialite app and would like information about purchasing it, see Bronto's App Center or contact your account manager.

Socialite is used to pass contact information between Bronto and your Facebook account.

**Facebook**

There are two ways you can use Socialite with Facebook. First, you can create a Facebook audience from a Bronto list or segment. This audience can be used as a custom audience in Facebook to target ads to these contacts. An audience can also be used to make a lookalike audience. A lookalike audience identifies other Facebook users who are similar to the custom audience but not already part of it.

You can also use Socialite to create Facebook tabs. A Facebook tab created in Socialite is similar to Bronto's add contact webform; it collects and passes contact data from Facebook to Bronto.

**Configure Socialite**

In order to use Socialite, you will need to configure your locale settings and connect Socialite to your Facebook account.

You can use the Settings menu **Settings >** to configure Socialite. Here you will find

- **Advanced Settings:** Where you set your locale. The locale setting for your account effects how currency is stored and how numbers are formatted, including the addition of commas to a number.
- **Add Account button:** Used to connect your Facebook account to Socialite.
- **A list of the accounts you currently have connected:** For each account you have the option of editing or deleting the connection and refreshing the access token. Refreshing the access token will prompt you to log back into the associated social network account. This is used to quickly and easily refresh Socialite’s ability to connect to the social network and operate on your behalf.

1. **Go to Apps > Socialite.**
2. **Click Settings.**
3. **Set up your locale:**
   Make sure to use the same locale you configured for your Bronto account to avoid inconsistencies in how your currency and numbers are stored.
   a) **Click advanced settings.**
   b) **Select your locale from the Number and Currency Locale list.**
   c) **Click Save.**
4. **To connect your Facebook account:**
a) Click Add Account.
b) Enter a unique account name in the Name box.
c) Enter a brief description in the Description box.
   If you plan to connect multiple Facebook accounts to Socialite, use the name and description to help your
   Bronto account users easily tell the difference between your Facebook accounts.
d) Enter the email address you want notifications associated with this account sent to in the Email For
   Notifications box.
   Socialite only sends email notifications if your account credentials expire or no longer work. For example, if
   you log into Facebook and change the password associated with the account. These notifications also appear in
   the activity log.
e) Select Facebook from the Network list.
f) Click Add.

Set Up A Facebook Audience (Socialite)
You can use Socialite to create an audience from any list or segment in your Bronto account that Facebook can use as
a custom audience.

A Facebook custom audience is a list of contacts that can be used for targeting ads on Facebook and excluding
contacts from ads on Facebook. When you create a custom audience in Socialite, any active contacts on the list
or segment you targeted is added to the audience. Once a custom audience is created and you have established a
connection between Socialite and your Facebook account, you will be able to see the audience in Facebook.

Socialite pulls metrics related to the audience from Facebook when you load the Facebook Audience page in
Socialite. These metrics include:

- Members: Number of contacts in the audience.
- Match: Percentage of contacts in the audience in comparison to your entire Facebook audience.
- Lookalikes: Number of Facebook contacts not in the current audience but that are similar to the traits of contacts
  in the audience.

These metrics are updated once-per-hour.

You can use Socialite to create a lookalike audience from any of the custom audiences you make. The members of
a lookalike audience resemble ("look like") the contacts in the source audience, but aren't part of the list or segment
that was used to make the original custom audience. These new contacts are pulled from Facebook and may or may
not already be Bronto contacts. For more information see Set Up A Lookalike Facebook Audience (Socialite) on page
1499.

To set up a Facebook audience:

1. Go to Apps > Socialite.
2. Click New Audience.
3. Select the Facebook account you want to associate the audience with from the Account list.
4. Enter a unique name for the audience in the Name box.
5. Enter a description for the audience in the Description box.
6. Select either List or Segment from the Source Type options, depending on which you are using to build the
   audience.
7. Select the specific list or segment from the Source list.
8. Click Create.
   The audience is created and displayed on the Facebook Audiences page in the Custom Audiences list. You can
   also see and use the audience in the Facebook account associated with the audience.

Set Up A Lookalike Facebook Audience (Socialite)
You can create a lookalike audience from any of the custom Facebook audiences you have created using Socialite.
The members of a lookalike audience resemble ("look like") the contacts in the source audience, but aren't part of the list or segment that was used to make the original custom audience. You can use the lookalike audience to market to contacts in Facebook the same way you use a custom audience. A lookalike audience can only target Facebook users from a single country.

To set up a lookalike audience:

1. Go to Apps > Socialite.
2. Locate the custom audience you want to use to create a lookalike and click the Create Lookalike action button.
3. Enter a unique name for the audience in the Name box.
4. Enter a description for the audience in the Description box.
5. Select the country you want to use to identify lookalike contacts from the Target Country list.
   Facebook requires that all lookalike audiences target Facebook members in a specific country.
6. Select what percentage of contacts in the target country you want to include by sliding the Match the top X% of the source audience bar.
   Match the top X% of the target audience means to build a lookalike audience consisting of the specified percentage of Facebook users in the target country that best match your audience. A higher the percentage will result in a larger but less targeted lookalike audience. A lower percentage will result in a smaller but more targeted audience.
7. Click Create.

Set Up A Facebook Tab (Socialite)

You can use Socialite to create content that can be loaded into a Facebook tab if your page has more than 2000 fans.

Socialite Facebook tabs are similar to Bronto's add contacts webform. Tabs can be used to capture email addresses, collect contact data for any contact field you store in Bronto, and/or add contacts to a list. A tab can have one or two stages plus a confirmation page. You might want to use a two stage tab when you want to request a contact provide a lot of additional information. Capturing the email address during the first stage ensues that Bronto has this contact information even if the contact declines to complete the second stage of the tab.

Once created in Socialite, you add the tab to your Facebook page by dragging it to the Drag any tab here box at the top of the page. Facebook requires a page to have 2000 fans before you can publish a tab. When you add an inactive tab to this box, you are give the option to select a Facebook account and publish the tab. The tab is added to Facebook as a tab as soon as you click the Publish button. When you add an active tab to the Drag any tab here box, you can deactivate the tab. Deactivating an active tab removes it from Facebook.

Socialite collects information about tab interactions for active tabs and displays interaction data for active and inactive tabs.

To set up a Facebook tab:

1. Go to Apps > Socialite.
2. Click New Tab.
3. Enter the name for your tab in the Name box.
   This is what is displayed for the tab in Facebook. If you have an active tab that isn't getting many views, you might want to consider changing the tab name.
4. Click Create.
   The Facebook tab builder opens with some pre-populated content the tab editor.
5. Use the tab editor to build out your tab:
   a) Drag form elements from the banner onto the canvas.
      The form elements include
• **HTML** provides a rich text editor that you can use to add text, paragraphs, lists, movies, links, etc. to your tab.
• **Line** adds a solid line to the tab. You cannot style the line.
• **Field** adds a contact field box that a contact can enter the relevant information into. After you add a field to the form, you can double click the field name to edit it. Type to change the name or click the star to make it a required field.
• **List** adds a list opt-in checkbox to the tab.
• **Text editing options** change all of the text shown on the form but will not override any text settings you made using the HTML editor.
• **Advanced settings** allows you to add hidden fields, set whether a contact's status will be set to unconfirmed or onboarding, and allows you to specify whether a contact is automatically added to a list.

b) Provide additional information, as prompted.

For example, if you drag **Field** to the canvas you will need to select which contact field you want to add.

c) Arrange items on the form by clicking on an item, dragging it across the canvas, and "letting go" of the item when it is where you want it to appear.

The form is two columns, so you can arrange items either vertically or horizontally in relation to other items on the form.

d) Optional: If you want to add a second stage to your tab, click the **Toggle Middle stage** box then design the second page of the tab.

e) Use the arrow to view the submission confirmation page, and design as desired.

You cannot add a submit button or capture any data using this page.

6. Click **Save** when you have finished building your tab.

The tab is added to the Inactive tab list on the Facebook Tabs page.

7. To add the tab to your Facebook page:
   a) Click on the tab in the Inactive list.
   b) Drag the tab to the **Drag any tab here/Activate** box at the top of the page and "let go" of the tab.

   The Confirm Publish dialog box is displayed.
   c) Select the Facebook account you want to add the tab to from the **Page** list.
   d) Click **Publish**.

   The tab is added to your Facebook page and your Facebook users can begin interacting with it.

**Socialite Dashboard**

The Socialite dashboard provides reports that give you insight into the performance of the Socialite app.

The dashboard page can be accessed by going to **Apps > Socialite**, then clicking the **Dashboard** tab. It's also the page that is shown by default when you open the app. On the dashboard are reports that provide insight into the performance of the Socialite app based on each type of social media integration.

**Contact Growth Report**

This report provides contact engagement statistics related across all of the social media platforms you have connected with Socialite. Statistics are broken down into separate graphs based on the status of the contact in Bronto when they signed up. Mouse over the different colors in the graphs to see the engagement for the social media platform the color represents.
Facebook Tabs Report
This report shows how many times all of your Socialite created Facebook tabs have been viewed and submitted and provides a submission rate.

Socialite Activity Log
The Socialite Activity Log is a record of the activities the app has triggered.

The Activity Log can be accessed by going to Apps > Socialite, clicking Dashboard, then clicking Activity Log. On this page there is an activity table that lists all of the Socialite events that have occurred, in chronological order from most to least recent. For each activity you can see:

- **Tool**: Which part of the app triggered the event. For example, Facebook Audiences.
- **Username**: Social media account user name associated with the event. Not all actions have a specific social network account associated with them, so the username field might be blank. For example, creating and updating a tab in Socialite doesn't use a Facebook account.
- **Object**: What object within the Tool triggered the event.
- **Description**: What happened.
- **Timestamp**: When the activity was recorded.

Toolbox
The Toolbox app is a collection of advanced features that allow you to perform complex platform operations.

Toolbox is divided into the following functional areas:

- **Activity Log**: List of timestamped Toolbox-specific activities.
- **Barcode Generator**: Creates a URL that can be used to place barcodes in messages.
- **Feed Parser**: Extracts content from a feed's URL and adds it to message content.
- **Link Modifier**: Adds or removes URL parameters to help promote analytics and tracking.

Toolbox Activity Log
The Toolbox activity log lists the 100 most recent actions made in the Bronto Toolbox.

The activities are listed from most recent to least recent. This allows you to quickly glance at the information you need to know about.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tool</td>
<td>Toolbox feature that triggered the activity; either Barcode Generator, Feed Parser, or Link Modifier.</td>
</tr>
<tr>
<td>Object</td>
<td>What item was modified. For example, if Feed Parser was used to populate a content tag, the Object would be Content Tag.</td>
</tr>
<tr>
<td>Description</td>
<td>Explanation of the activity that occurred. Note: If you see Invalid Message from Template here, this error occurs when attempting to make a change to a message that is based on a Bronto Template. Bronto Templates cannot be modified in the Toolbox.</td>
</tr>
<tr>
<td>Timestamp</td>
<td>The UTC time the action occurred. UTC (Coordinate Universal) time is the primary standard time which the world uses to regulate clocks and time. This time is useful for providing a common date and time across multiple time zones.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar Icon</td>
<td>The calendar icon is either present or not present. If it is present the entry in the Activity Log was performed by a scheduled job. For example, the Feed Parser can perform automatic nightly refreshes and will log these types of entries whenever that happens. This allows you to determine what was executed manually, or automatically.</td>
</tr>
</tbody>
</table>

### Generate Barcodes With Toolbox

You can use Toolbox to generate a URL that can be used to share a barcode.

The barcode feature in Toolbox is not used to bulk generate barcodes. Instead, barcode generator can create a URL that you can copy and paste into a message or browser in order to generate a barcode. If added to a message, the barcode is generated when the message is sent.

The URL/barcode that you generate cannot be saved in Toolbox. When you exit the page the changes you make will be lost. However, you can copy and save the generated URL and make changes directly to it. All of the data and settings specified in the barcode generator are parameters in the generated barcode URL. So you can modify portions of a saved URL to make formatting or content changes. Each change you make defines how these parameters are added to the link to properly render a barcode meeting the specifications you create.

1. Go to Apps > Toolbox.
2. Click Barcode Generator.
3. Enter text in the **Enter a code to use for rendering the preview** box that mimics how your coupon codes are formatted.
   
   This allows you to accurately preview what your coupon codes look like. This is not the text that will be used in the barcode itself; that text is entered later. However, if you're using an API or field tag, entering text here will allow you to preview what your barcode will look like once the tag is replaced.
4. Select the correct barcode format from the **Barcode Format** list.
   
   This indicates which barcode rendering will be used for the uploaded coupons. For example, if your coupon codes are QR codes then you should select **QR Code** from the list.
5. Select **Yes** if you want to include a text-based code with the barcode from the **Include Human Readable Text** list.
6. To change the orientation for the coupon code display in your message, select **Clockwise** or **Counter-Clockwise** from the **Rotation** list.
7. To make the barcode larger or smaller, adjust the **Width**.
8. Design the text appearance by clicking on or selecting different **Format** options.
   
   The preview text below will change as you make selections.
9. To change the background color for the message, select it from the **Background Color** interface then click **choose**.
10. To increase or decrease the size of the box around the text, increase or decrease the **Padding**.
11. In the **Provide a static code to be used or select a Bronto tag** box either:
    - Enter the text you want embedded in your barcode by typing it into the box.
    - Click the tag button and select the **API** or **Field** tag you want to use.
12. When you finish designing the barcode, copy the URL and paste it into whatever you are trying to use the barcode in.

   The URL can be placed in an image tag in a message. It can also be sent directly to someone and will open in any browser. This can be useful if a barcode URL is sent through an SMS message and viewed on a phone.

### Toolbox Feed Parser

Feed parser gives you the ability to extract content from a feed's URL so it can be included in message content.
With feed parser, you can identify the feed you want to pull content from, modify the feed's content, and add the content to a header, footer, content tag, or message body. You can also use feed parser to automatically update content from the feed using a nightly refresh or manually update content as changes to the feed occur.

The following table covers the basics:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="create-parser.png" alt="Create Parser" /></td>
<td>Allows you to create a need connection between a message, header, footer, or content tag and a feed. For more information see Parse Feeds With Toolbox on page 1504.</td>
</tr>
<tr>
<td><img src="process.png" alt="Process" /></td>
<td>Checks the feed for new content and updates content in Bronto as needed.</td>
</tr>
<tr>
<td><img src="preview.png" alt="Preview" /></td>
<td>Displays a preview of the last imported feed content.</td>
</tr>
<tr>
<td><img src="edit-name.png" alt="Edit Name" /></td>
<td>Updates the name of a feed parser. To edit the parser itself, click on its name.</td>
</tr>
<tr>
<td><img src="duplicate.png" alt="Duplicate" /></td>
<td>Creates a copy of a feed parser. This is useful if you want to duplicate the current feed content and use it in a different way.</td>
</tr>
<tr>
<td><img src="delete.png" alt="Delete" /></td>
<td>Deletes a feed, breaking any connection that may exist between it and message content.</td>
</tr>
<tr>
<td><img src="toggle-nightly-refresh.png" alt="Toggle Nightly Refresh" /></td>
<td>Turns on or off a nightly pull of content from the feed.</td>
</tr>
</tbody>
</table>

Parse Feeds With Toolbox
You can use feed parser to design templates from RSS feeds that can be inserted into messages, headers, footers, or content tags.

To do this:

1. Go to **Apps > Toolbox**.
2. Click **Create Parser**.
3. Enter a name in the **Name** box.
4. Optional: Enter a description in the **Description** box.
5. Click **Create**.
6. Enter a URL for your feed in the **Enter a feed URL** box then hit Enter.
   
   The feed and entry variables for the URL are populated. Feed variables give access to top-level information about the feed, whereas entry variables provide access to information about the individual items provided by a feed such as announcements, products, blog posts, etc.). Both can be added to your template.
7. Click the **Template** tab to build your template.
   
   The template builder is displayed. Steps 8-12 explain how you can build a template, but do not need to be completed in the order they are provided.
8. Optional: Click **Insert Example Template** to start with a basic template outline you can work from.
9. As desired, add variables to your message by clicking on either the **Feed Variables** or **Entry Variables** tab, clicking the copy button to copy a variable or value, and pasting that variable or value into the template builder.

- **Feed Variables** give access to top-level information about the feed, whereas **Entry Variables** provide access to information about the individual items provided by a feed.

10. Optional: Use entry loops to select a set of entries from a feed and repeat a portion of the template.
   a) Add the opening and closing `{{entry_loop}}` tags.
   b) Click on the **Entry Variables** tab, copy a variable you want to use, then add it to the entry loop.
   c) Repeat the previous step until all of the entry variables you want to use are included in the loop.
   d) Optional: Include additional optional settings in the opening `{{entry_loop}}` tag.

These can include:

- **skip** - Specifies the number of items to skip in the feed before starting the loop.
- **limit** - Specifies the maximum number of items to loop over.
- **filter-variable** - Specifies the Entry Variable to use for filtering which items to include. (Requires a filter-value be set)
- **filter-value** - Specifies the value of the Entry Variable set in the filter-variable setting. (Requires a filter-variable be set)
- **filter-type** - Specifies how the Entry Variable set in filter-variable is compared to the filter-value. By default, if this setting is not set, it must be an exact match. The following options are supported:
  - **equalsIgnoreCase** - Variable value is an exact match, ignoring upper and lower case differences.
  - **startsWith** - Variable value begins with the filter-value text.
  - **contains** - Variable value contains the filter-value text.
  - **matches** - Variable value matches using filter-value as a Regular Expression.

The following example of an entry loop filters items that have the entry variable `{{category}}` with a value of "Features". It then skips the first entry and displays a maximum of 5 items. For each item that matches, it displays the title entry variable.

```html
{{entry_loop filter-variable="category" filter-value="Features" skip="1" limit="5"}}

{{title}}

{{/entry_loop}}
```

11. Optional: Apply formatting expressions to your variables.

A formatting expression is added by placing a bar after the variable name. For example: `{{pubDate|dateformat("yyyy-MM-dd")}}`. The following expressions are supported:

<table>
<thead>
<tr>
<th>Formatting Expression</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>trim</td>
<td>Truncates the text of a variable at a certain length. The following example will cut off the value of the variable <code>{{title}}</code> at 200 characters and append an ellipsis as a suffix.</td>
<td>`{{title</td>
</tr>
<tr>
<td></td>
<td>The suffix is optional and defaults to an ellipsis. The following example is equivalent: `{{title</td>
<td>trim(200)}}`</td>
</tr>
<tr>
<td></td>
<td>An additional third parameter may be specified. When true, it will make sure to preserve words and not split in the middle of a word.</td>
<td>`{{title</td>
</tr>
<tr>
<td>Formatting Expression</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>dateformat</td>
<td>Formats a date from a variable using the patterns described here. The following example will convert the {{pubDate}} variable from a source format of &quot;EEE, dd MMM yyyy HH:mm:ss Z&quot; to &quot;yyyy-MM-dd&quot;. This would convert a date that looks like &quot;Fri, 25 Jul 2014 14:18:57 +0000&quot; to &quot;2014-07-25&quot;.</td>
<td>{{pubDate</td>
</tr>
<tr>
<td>extract_image</td>
<td>Strips all content except for the specified HTML image tag. This example will get the first image found in the {{description}} variable.</td>
<td>{{description</td>
</tr>
<tr>
<td>strip_images</td>
<td>Removes all HTML image tags from the variable content.</td>
<td>This example will remove all image tags from the {{description}} variable.{{description</td>
</tr>
<tr>
<td>strip_html</td>
<td>Removes all HTML tags from the variable content.</td>
<td>The following example will remove all tags from the {{description}} variable. {{description</td>
</tr>
</tbody>
</table>

Formatting expressions can be chained together using the pipe (|) character and, when chained, are applied from left to right. For example {{title|strip_html|trim(14, "...")}}.

12. Use the buttons at the top of the template builder to style your message.

You can hover over a button to see a brief description of what each button is.

13. Click on the Preview tab to see a preview of the message, and click Template to continue building your template until you are satisfied with the preview.

14. Click Settings to configure how your template will be used and updated:
   a) Select the type of message content you want to apply the template to from the first list.
   b) Select the specific message, header, footer, or content tag you want to apply the template to from the second list.

   If you selected Create New, enter a name in the box and click Create.
   c) If you wish to automatically update nightly with any changes from the feed, set Nightly Refresh to On.

15. When finished, click Save & Close.
Modify Links With Toolbox

Link modifier can add or remove URL parameters contained in links that are in the header, footer, or body of a message.

URL parameters exist in the query portion of a link after the ?. Parameters can be added to URLs to pass additional information to a server and are often used when collecting analytics. Link modifier allows you to select a message, content tag, header, or footer in order to identify common URL parameters in the links contained in the selected message element. It will only identify parameters that are shared across all links in the message content, if a parameter isn't shared across all of the links it will not be recognized as being modifiable.

Link modifier looks for the links that exist in the HTML code of the content you have selected. This includes any link in within an anchor tag. For example, `<a href="http://www.example.com">Example Link</a>` would find the link http://www.example.com. You can modify or delete these parameters or use link modifier to add new URL parameter.

1. Go to Apps > Toolbox.
2. Click Link Modifier.
3. Select either & or ; from the Select your parameter delimiter list.
   The delimiter you select offsets the parameter from the other parameters in the URL.
4. In the Select an object to parse section
   a) Select the type of message content you want to examine from the first list.
   b) Select the name of the message, content tag, footer, or header you want to examine from the second list.
   If there are any common URL parameters they are displayed and you are able to edit them.
5. Optional: If there are existing parameters you want to modify, update the existing VALUE that is displayed.
   You can either type in a new value or use the tag button to insert an API, Field, or Special tag.
   To delete a parameter, use the trash can button.
6. To add a new parameter:
   a) Click the Add Parameter button.
   b) Enter the variable for the parameter in the KEY box.
   c) Enter the value related to the variable in the VALUE box.
   You can either type in a new value or use the tag button to insert an API, Field, or Special tag.
   A preview of your parameters are displayed. For example, if you enter id in the KEY box and 12345 in the VALUE box, the parameter &id=12345 is appended to your links.
7. Click Modify Links to apply your changes to your message, content tag, footer, or header.

Apps Dashboard

The Apps Dashboard provides an access point to all of the apps provided through Bronto, including apps developed by third-parties.

The Apps Dashboard is divided into two areas. In the My Apps section, you can see all of the apps you have purchased. If you click on the icon for one of these apps, the app launches. In the Featured Apps section, you can see all of the apps that are available for purchase. If you click on app in this section, the Bronto AppCenter opens in a new browser tab or window with the page for the app displayed. The AppCenter provides a detailed overview of each applications' functionality and a link to request more information about purchasing the app.

Unlike other dashboards, the Apps Dashboard cannot be customized.

Find Out Information About An App

To find out more information about an app:

1. Go to Apps > Dashboard
2. Click on an app.
You will be taken to the **Overview** page for the app. You can view a description of the app as well as screenshots.

### Purchase An App

Apps can be purchased by contacting your account manager.

After your account manager enables the app for your account, it will appear in the **My Apps** section on the **Apps Dashboard**.

To contact your account manager about a specific app:

1. Go to **Apps > Dashboard**
2. In the **All Apps** section, click on the app you are interested in.
3. Click **Request Info**.
4. Optional: Add any additional information you want to send to your account manager in the **Additional Comments** text box.
5. Click **Submit Request**.

### View Purchased Apps

To view the purchased apps in your account:

1. Go to **Apps > Dashboard**.
2. The apps purchased in your account will be shown in the **My Apps** section.

### View Apps That Are Not Purchased

To view the apps in your account that have not been purchased:

1. Go to **Apps > Dashboard**.
2. The apps that have not been purchased in your account will be shown in the **All Apps** section.

### Launch An App

After an app has been purchased, you can launch the application and begin using it.

To launch an app:

1. Go to **Apps > Dashboard**.
2. In the **My Apps** section, click on the app you want to launch.

### Get Support For A Bronto App

Apps developed by Bronto are supported by Bronto.

Third party applications are developed and supported by third party developers. Bronto does not provide support for third party applications.

To open a support ticket for Apps developed by Bronto:

1. Click **Support** in the top right of the screen.
2. Click **Open Support Case**.
3. Add any additional information about the issue in the **Case Information And Description** section.
4. Click **Submit Request**.
Get Support For A Third-Party App

Third party applications are developed and supported by third party developers.

Apps developed by Bronto are supported by Bronto, but Bronto does not provide support for third-party apps.

To get support for a third-party app:

1. Go to Apps > Dashboard
2. Click on the app you want support for.
3. Click Support.
4. In the Contact Support section, you can find contact information for the app developer.

About Bronto

The Bronto Marketing Platform (BMP) helps you deliver timely, relevant, data-driven digital marketing that fuels engagement throughout the customer life-cycle and drives more revenue. In order to get started with Bronto, you will need to import valid contacts and design messages you can send to those contacts. It doesn't matter if you start by designing messages, or start by importing contacts, or even have a team tackle both at once. Contact management and message management are independent of each other until you start using contact data in messages, scheduling (sending) messages, or targeting message design for a particular audience using segments or lists. Then, once you have your contacts and messages, you can start sending messages and using reporting to monitor your success.

Data Retention Policy

Our Data Retention Policy outlines what data we maintain indefinitely and what data we periodically delete.

Generally, the things you create in Bronto, like workflows and messages, are kept indefinitely unless you delete them. But data that is collected by Bronto is subject to our Data Retention Policy. Under the policy some data in Bronto expires based on your Data Retention Period and some data is kept indefinitely:

- **Detailed Tracking Data**: Expires. The data for specific contacts about emails they were sent and actions that were performed (sends, clicks, opens) is kept for a limited amount of time due to the huge volume and relative shelf life of this data.
- **Aggregate Tracking Data**: Is Retained. Totals and statistics calculated from the detailed tracking data for every delivery is kept indefinitely for all messages.

By default, detailed tracking data for email deliveries are tracked and maintained in Bronto for 90 days. Depending on your account type, you can purchase an extended Data Retention Period of 1, 2, or 3 years in order to retain this data for a longer period of time. After data expires it is not available for review or use within Bronto. However, you can still view the aggregate information based on the expired data so you can use these statistics to recognize trends that can help you better target your marketing campaigns.

If you want to maintain detailed tracking data indefinitely you can save this data outside of Bronto by exporting and saving it. For more information, see Archive Data Affected By The Data Retention Policy on page 1513.

The Data Retention Period for your account can be viewed by clicking the Account Info link in Bronto. If you are interested in extending your Data Retention Period contact your Account Manager to see if you are eligible.
The following table outlines how things in Bronto are affected by the Data Retention Policy:

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Retained or Expires</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users and Account Settings</td>
<td>Retained</td>
<td>Cart data, including line item information, will be deleted from Bronto 90 days after the cart creation date. Cart statistics used to generate metrics will be saved indefinitely.</td>
</tr>
<tr>
<td>Carts</td>
<td>Expires</td>
<td></td>
</tr>
<tr>
<td>Consent Records</td>
<td>Retained</td>
<td>Retained for the lifetime of your Bronto account.</td>
</tr>
<tr>
<td>Contact History</td>
<td>Expires</td>
<td>This is the information on the History tab of the Contact Details page.</td>
</tr>
<tr>
<td>Contacts and their field data</td>
<td>Retained</td>
<td>When you delete a contact, they are no longer visible in your account and will not receive any of your emails. A contact's data is typically deleted within 24 hours but it could take up to 15 days to fully remove all related data.</td>
</tr>
<tr>
<td>Lists and Suppression Lists</td>
<td>Retained</td>
<td>Segment data is retained but some data segments may use does expire. The length of time we will keep contact-level sent, opened, clicked, and/or conversion click metrics are subject to your account's data retention policy at the time a segment is created. If a segment is built based on one of these metrics that are past the Data Retention Period, then the segment data may be inaccurate or not return results.</td>
</tr>
<tr>
<td>Segments</td>
<td>Retained</td>
<td></td>
</tr>
<tr>
<td>Data Type</td>
<td>Retained or Expires</td>
<td>Notes</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Product Data</td>
<td>Retained</td>
<td></td>
</tr>
<tr>
<td>Order Data and RFM Metrics</td>
<td>Retained</td>
<td></td>
</tr>
<tr>
<td>Messages</td>
<td>Retained</td>
<td>This includes:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• All messages (Email, SMS, Facebook, Twitter)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Message folders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Message templates and template folders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Message content blocks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Calendar data</td>
</tr>
<tr>
<td>Online version of previously sent email messages</td>
<td>Expires</td>
<td>This is the web version of an email that contacts can view by clicking the &quot;Have trouble viewing this?&quot; link. Once the data retention policy has passed, this link will no longer work in old emails.</td>
</tr>
<tr>
<td>Link Tracking</td>
<td>Expires</td>
<td>While link tracking data expires, the links contained in your sent emails continue to work for the life of your account.</td>
</tr>
<tr>
<td>Delivery History</td>
<td>Some data is retained, some data expires</td>
<td>The record of deliveries is maintained, but detailed information about deliveries that is subject to the Data Retention Policy will not be shown when you view a delivery or delivery report after the data expires. This includes detailed information about sends, clicks, and opens. Therefore, the name of any list, segment, or keyword that a delivery was sent to, or that was excluded from the send, is not displayed for deliveries past the Data Retention Period. Instead you may see the word <strong>Unavailable.</strong></td>
</tr>
<tr>
<td>Delivery Metrics</td>
<td>Retained</td>
<td>This includes things like the number of opens, the average clicks, and the conversion rate. It does not include contact-level details about these actions.</td>
</tr>
<tr>
<td>Email Replies</td>
<td>Expires</td>
<td>This does not apply to any email address that replies were forwarded to outside of Bronto.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Retained or Expires</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------------</td>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Content Menu Options</td>
<td>Retained</td>
<td>This includes:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Hosting Content</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Email Templates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Headers and Footers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Content Tags</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Webforms</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Feeds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• QR Codes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Shortened URLs</td>
</tr>
<tr>
<td>Automated Message Rules</td>
<td>Retained</td>
<td>Automated message rules may not be built based on contact-level sent/opened/clicked/converted data that has expired. AMR report data is subject to the Data Retention Policy for reports.</td>
</tr>
<tr>
<td>Workflows</td>
<td>Retained</td>
<td>Workflow report data is subject to the Data Retention Policy for reports.</td>
</tr>
<tr>
<td>Legacy Reports</td>
<td>Some data is retained, some data expires</td>
<td>Contact-level details about sends, opens, clicks, and conversions expire. Aggregate and summary reporting data is retained. User-generated reports and consent export reports expire after 90 days regardless of an account's Data Retention Period. &lt;br&gt; <strong>Note:</strong> Reports based on contact-level sent/opened/clicked/converted data older than the Data Retention Period will not display any data.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Retained or Expires</td>
<td>Notes</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>New Reports</td>
<td>Some data is retained, some data expires</td>
<td>Deliveries: hour-level data is only available for the first two weeks after the delivery is sent. When you view a report for a delivery that was sent more than two weeks ago, and select a data range that would display hour-level metrics within the first 2 weeks, data will be unavailable. Messages, Lists, Segments: the most recent two weeks of hourly-level data will always be available for querying. When you view a report for any of these objects and select a data range that would display hour-level metrics in charts outside of the most recent 2-weeks, data will be unavailable. <strong>Note:</strong> Hour-level data is the default view in charts for a 3-day period or less. Any date filter that is greater than 3 days results in charts defaulting to day-level data.</td>
</tr>
</tbody>
</table>
| Browse Events       | Expires             | Browse event data is available for storage to Browse Recovery and Recommendations Premium app users.  

- **Browse Recovery:** Stores the last 30 days of browse data. This data is used to evaluate Browse Recovery rules in order to trigger email messages.
- **Recommendations Premium:** Stores the last 90 days of browse data for use in identifying a contact's browsed products. This is used to recommend related products or to limit results of a recommendation to products browsed during that time period. |
| Apps                | N/A                 | App data is not subject to Bronto's Data Retention Policy but is subject to any Data Retention Policy that app may have. For more information on this, see the documentation specific to an app.                                                                                                                                  |
Each section below explains how to export that type of data.

**Email Replies**

Export the email replies using the Export button on the Email Replies page. To do this:

1. Go to **Messages > Email Replies**.
2. Click **Export**.
3. Choose the type of email replies you want to export using the **Type** pull-down menu. You can choose from:
   - All
   - Automated
   - Spam
   - Unclassified
   - Unsubscribe
4. Choose the date before or the date after for which you would like to receive the email replies report.
   
   Click the calendar icon to choose a specific date.
5. **Optional**: Choose an email address to be notified when the export is finished.
6. Click **Generate**.

You will be notified in the application when the report is finished. Additionally, if you choose to have an email address notified in the previous step, that address will receive an email as well.

**Contact History**

Use the API and the **readContacts** call to retrieve a contact's history.

**Online Message Version**

Navigate to each online version of a message and save the web page. Create the message as a web page hosted on your servers and use the **Send Webpage** functionality.

For more information on the **Send Webpage** message type, see Create Web Page-Based Email on page 120.

**Contact Level Sent/Opened/Clicked/Converted Data**

Navigate to each delivery report for a message and download a Detailed Report using the button provided.

For more information on downloading a detailed report, see Download A Summary of Detailed Contact Report on page 821.

**User Generated Reports**

If you have generated a report, the report will be kept on the report downloads page (Go to **Reports > Report Downloads**) for the duration of your data retention period. To permanently archive those reports (which are subject to the data retention policy) download the report from the report downloads page by clicking on the name of the report.

---

**Content Security Policies**

Content Security Policies are delivered as a header to your contacts' browser by your web server and they are used to declare which dynamic resources are allowed to load on your page.

For many websites, you can simply declare that only scripts/styles from your own domain and from any tools that your are using are allowed. But, this can become more involved when you use more complex set ups.
If you are using a default CSP, then adding the following line to your `default-src` rules will be sufficient. The ellipses (...) in the examples is a placeholder for any existing rules you might have in place:

```
default-src ... *.bronto.com:* *.bron.to *brontops.com ajax.googleapis.com;
```

If you want stronger restrictions we recommend the following template:

```
img-src ... *.bronto.com *.bron.to;
style-src ... *.bronto.com cdn.materialdesignicons.com;
script-src ... *.bronto.com ajax.googleapis.com 'unsafe-eval';
connect-src ... *.bronto.com* *.bronto.com* *.brontops.com*;
```

If your CSPs require more specific security allowances, these are the minimum security allowances that you need to add to your web server to allow Bronto to function properly on your site:

```
        http://app.bronto.com
        c.bron.to
        cdn.materialdesignicons.com
        https://cdn.materialdesignicons.com
        js.bronto.com
        c.bron.to https://
connect-src ... *.bronto.com* *.bronto.com* *.brontops.com*;
```

**Bronto Cookies**

Bronto uses cookies to collect information about your contacts in order to help you personalize marketing campaigns. In this topic we explain what each cookie is used for, the data that is collected by each cookie, and what the cookie duration is. Any information collected by the cookie that is stored in Bronto is retained based on Bronto's data retention policy for the type of data collected.

**Platform Cookies**

These are the cookies used by the Bronto platform. The only piece of contact data captured by (some of) these cookies is a contact identifier. This identifier is generated by Bronto and associated with the contact in Bronto's database. It is not a contact's email address or other PII.

These cookies can also collect information related to your account such as the Bronto-generated site identifier and the identifier for the delivery or message that was sent to the contact.
### About Bronto

<table>
<thead>
<tr>
<th>Cookie Indicator</th>
<th>Description</th>
<th>Data Collected</th>
<th>Cookie Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>bs_t_</strong></td>
<td>Cookie used by multiple tracking functions in Bronto. This cookie is specifically used with accounts that use Order Service. You can <a href="#">click here</a> to check if your account uses Order Service.</td>
<td>A contact identifier, your Bronto site identifier, and the delivery identifier</td>
<td>20 years</td>
</tr>
<tr>
<td><strong>bs_t_bc_</strong></td>
<td>Session-specific cookie that is used with the super cookie. This cookie tells Bronto whether to attribute the data in the Super Cookie to the current conversion or whether the browser has been closed. When browser is closed; no contact data is collected by the cookie</td>
<td>Expires at the end of the session</td>
<td></td>
</tr>
<tr>
<td><strong>du_</strong></td>
<td>Encrypted user-specific cookie that stores and is used with direct update.</td>
<td>Contact identifier</td>
<td>20 years</td>
</tr>
</tbody>
</table>
| **tid_** | Used to associate a contact and email delivery in conversion reporting. There are two versions of the TID cookie:  
• Version 3 is associated with messages sent before April 2016.  
• Version 4 is associated with any message sent after April 2016. | Contact identifier, site identifier, list identifier, segment identifier, delivery identifier, message identifier, and delivery type | Configurable |
| **Legacy Conversion Tracking Encrypted String** | Contains encrypted site ID and is only used when your account using Advanced Conversion Tracking. **Note:** If you use Order Service you do not use Advanced Conversion Tracking. You can [click here](#) to check in the platform which you use. | Site identifier | 20 years |

### Bronto App Cookies

These cookies are used by apps that are developed by Bronto. Some app cookies collect an encoded contact email address.

For information about cookies used by third-party applications, see their documentation.

<table>
<thead>
<tr>
<th>Cookie Indicator</th>
<th>Description</th>
<th>Data Collected</th>
<th>Cookie Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>vib_</strong></td>
<td>Pop-Up Manager cookie that contains the number of visitor sessions anonymously. This is used to prevent showing a pop-up more than once per session.</td>
<td>Number of visits; no contact data is collected by the cookie</td>
<td>Variable; based on your Pop-Up Manager configuration</td>
</tr>
<tr>
<td>Cookie Indicator</td>
<td>Description</td>
<td>Data Collected</td>
<td>Cookie Duration</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
<td>----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>vsb</td>
<td>Pop-Up Manager cookie that contains the number of page views anonymously. This is used when determining whether to trigger a pop-up.</td>
<td>Number of page views; no contact data is collected by the cookie</td>
<td>Variable; based on your Pop-Up Manager configuration</td>
</tr>
<tr>
<td>cib</td>
<td>Pop-Up Manager cookie that contains the number of times a link was clicked. This is used when determining whether to trigger a pop-up.</td>
<td>Number of times a link was clicked; no contact data is collected by the cookie</td>
<td>Variable; based on your Pop-Up Manager configuration</td>
</tr>
<tr>
<td>__bron_bar</td>
<td>Browse Recovery or Recommendations Premium cookie that contains anonymous user ID and 10 most recently viewed products. This is used to help personalize recommendations.</td>
<td>Last 10 products viewed; no contact data is collected by the cookie</td>
<td>1 year</td>
</tr>
<tr>
<td>__bron_bav</td>
<td>Used to only send 1 site visit event per individual per day. This is used to update the Browse Recovery Last Visit Date field in Bronto.</td>
<td>Current timestamp; no contact data is collected by the cookie</td>
<td>1 day or less (expires at midnight on the current day)</td>
</tr>
<tr>
<td>__bron_bas</td>
<td>Browse Recovery or Recommendations Premium cookie used to identify the individual associated with browse activity. Used to prevent repeated sending of the same data for a contact to Bronto.</td>
<td>A unique contact identifier. This identifier is not PII but could be linked to Bronto contact information like a contact EID or email address.</td>
<td>1 year</td>
</tr>
<tr>
<td>__bron_bac</td>
<td>Browse Recovery or Recommendations Premium cookie that contains unique ID for registered email recipient. Used to prevent repeated sending of the same data for a contact to Bronto.</td>
<td>(SHA-512 hashed) external contact ID</td>
<td>1 year</td>
</tr>
<tr>
<td>__btr_em</td>
<td>Cart Recovery cookie that contains an encoded customer email address.</td>
<td>Encoded contact email address</td>
<td>30 days</td>
</tr>
<tr>
<td>__btr_id</td>
<td>Cart Recovery cookie that contains a customer cart ID that can be associated with a user.</td>
<td>Encoded cart ID; no contact PII is collected by the cookie</td>
<td>24 hours</td>
</tr>
</tbody>
</table>
Browser Compatibility

Bronto supports the most recent versions of commonly used browsers. Due to the large number and diverse design of web browsers, we are unable to support every make and version. We do, however, strive to make the application fully compatible with the browsers that are the most popular and widely used by our customers.

Bronto fully supports Internet Explorer 11 and greater. We recommend you upgrade your browser version, or use a different browser, if you experience issues with older versions of Internet Explorer.

For other commonly-used browsers, such as Google Chrome, Mozilla Firefox, and Apple Safari, we recommend you keep your browser version up-to-date in order to avoid application usage or speed issues.

How Contacts Can Request To Be Unsubscribed

There are several ways Bronto contacts can request to be unsubscribed.

Direct email from subscriber to abuse@, postmaster@, privacy@bronto.com

Bronto contacts can email Bronto directly to request we remove them from your marketing list. Email addresses contacts can send a request to include privacy@bronto.com, abuse@bront.com, and postmaster@bronto.com. When we receive this request we will:

1. Access your account and find the contact using the Bronto platform.
2. Click on the Unsubscribe button associate with the contact record.

This updates the contact’s status to Unsubscribed. The contact is not notified by Bronto, unless they requested a confirmation.

This is an admin function that you can also perform.

Requests from IP address provider

Bronto contacts can write in to our IP address host provider asking to be removed from your email marketing list. The host provider sends an email to the Bronto deliverability team notifying us of the complaint. The email contains either the actual complaint email or just the contact’s email address and the organization that sent to them.

Bronto unsubscribes the contact and sends a confirmation to the host provider that the contact was unsubscribed. The host provider also creates their own internal tickets for this communication/interaction with Bronto and the contact.

Formal complaints from unsubscribe webforms or filing a formal complaint

When contacts click the unsubscribe link in an email, an unsubscribe webform opens. On the unsubscribe confirmation page, contacts are provided a formal complaint link. If they click this link, they can enter a complaint in a text box. Typically contacts will say that they have asked to be unsubscribed but they weren’t removed from the subscription.

When we receive a formal complaint, we will check if the contact has unsubscribed status. If they don’t, we unsubscribe the contact using the Bronto’s admin page.

Alert from ISP

ISPs, such as AOL, UOL, Yahoo, and Comcast, may send us a direct complaint from a Bronto contact. Typically, these are handled via the ISP FeedBack Loop program, however ISPs can also send complaints directly to Bronto at abuse@bronto.com.

These complaints include the original marketing email. Bronto clicks on the unsubscribe link within the email to unsubscribe the contact. There is no confirmation sent back to the requesting ISP.
This topic provides an easy way to access Bronto webinars.

Each webinar is listed below with a description and publication date. Click on the name of the webinar to open it in YouTube.

<table>
<thead>
<tr>
<th>Webinar</th>
<th>Presentation Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating A Revenue-Generating Welcome Series</td>
<td>2/27/2016</td>
<td>A walk through of strategies and tactics you can use to boost your welcome series.</td>
</tr>
<tr>
<td>15 List Growth Strategies</td>
<td>5/25/2016</td>
<td>15 tactics you can implement to help increase subscribers.</td>
</tr>
<tr>
<td>Automation Strategies That Drive Revenue and Engagement</td>
<td>6/23/2016</td>
<td>A demonstration on how to implement triggered messages as part of your commerce marketing strategy.</td>
</tr>
<tr>
<td>Crafting Emails Your Subscribers Will LOVE</td>
<td>8/30/2016</td>
<td>Some tips on what design, content, and considerations make up a must-open email.</td>
</tr>
<tr>
<td>Email Design Trends You Need To Try</td>
<td>10/21/2016</td>
<td>Take a look at different trends digital retailers and marketers are using in email today.</td>
</tr>
<tr>
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A/B Split Test

A/B split tests allow you to quickly compare multiple versions of a message in a way that lets you discover the best performing option. Whether it's the best subject line, or a choice between two images, A/B split tests take judgment calls out of the equation.

Active (Contact Status)

Contacts with a status of Active are contacts that can receive emails from you.

Action Node (Workflow)

An action node might send email, update field information, or change a contact's list membership. A workflow can have multiple action nodes.

AMR (Email Delivery Type)

The AMR email delivery type represents email deliveries that were sent via an Automated Message Rule.

API Message Tags

API message tags are user defined tags that allow you to insert HTML content into the body and subject line of messages using the API. The content you add via API message tags will be added to the message at send time. These tags are useful if you want to sync content from your system (database, CRM, etc.) with messages you send with the platform. You will need to call addDeliveries in order to use API message tags.

Audit Log

The Audit Log allows you to see actions that have been performed within your Bronto account. In the log you can see what action occurred, the user name associated with the action, and the date and time the action occurred.

Automated Onboarding

Automated onboarding is a simple process that allows you to quickly add contacts to your account, while mitigating the risk of these contacts negatively affecting sending in your account.

Automated Message Rules

AMRs are a set of criteria you define that can be used to automatically send email. With automated message rules, you gain the power and flexibility to deliver emails to your contacts when it makes the most sense. This allows you to focus your energy on compelling message design and campaign strategies.
### Average Click Rate (Lists And Segments)

The average click rate represents an average of the individual click rates for each delivery sent to the list or segment.

### Average Clicks

The average clicks metric represents the average number of times a link was clicked in an email. For example, if your email has 20 total clicks and 5 links, then the average clicks would be 4.

### Average Conversion Rate (Lists And Segments)

The average conversion rate represents an average of the conversion rates for each delivery sent to the list or segment.

### Average Delivery Rate (Lists And Segments)

The average delivery rate represents an average of the individual delivery rates for each delivery sent to a list or segment.

### Average Open Rate (List And Segment)

The average open rate represents an average of the individual open rates for each delivery sent to a list or segment.

### Average Opens

The average opens metric represents the average number of times emails you sent were opened. For example, if 20 total opens and 5 emails are recorded, then the average opens would be 4.

### Average Order Value (AOV)

The average order value is a comparison of the number of orders to the total revenue. This is important because it provides insight into how much contacts are spending, on average, each time an order is placed.

### Awaiting Assessment

After a contact has been sent their first email, they enter the assessment phase of the automated onboarding process, and hence move from Onboarding to Awaiting Assessment. After a contact has been assessed, they will move from Awaiting Assessment to Active. You can send to contacts while they are in the waiting assessment period and there is no limit on the number of sends allowed for a contact.

### Bad Email Address

The bad email address bounce type means that the email server in question has indicated that this is not a valid account. Whether the contact has left that host, had a typo in their registration, or simply made up the email address cannot be discerned from this message.
Basic Keywords (SMS)

Basic, or non-subscription based keywords are meant for individual transactional interactions. With non-subscription based keywords, a recipient texts in to a keyword and a response is sent back. The interaction ends there. The recipient is not added to a list because they have not agreed to receive future marketing messages from you.

Bounce

An email bounce, or failed DSN (Delivery Status Notification), is an automated electronic message from a mail system informing the sender about a delivery problem with their (the sender's) original email message. So in the context of the application, if you send an email message and the delivery fails, our mail server will receive a bounce message explaining why the email message bounced.

Bounce (Contact Status)

Contacts with a status of Bounce cannot be sent emails because they have hard bounced due to a bad email address, or they have exceeded the bounce limit set for your account.

Bounce Rate

The bounce rate indicates the percentage of bounces (as compared to the number delivered) recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group.

Browse Recovery

Browse Recovery allows you to capture potentially lost revenue based on the behavior of contacts on your site. Browse Recovery allows you to define rules that can be used to send targeted messages to contacts based on their browse behavior.

Bulk (Email Delivery Type)

The Bulk email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.

CAN-SPAM

CAN-SPAM spells out penalties for spammers and companies whose products are advertised in spam if they violate the law, and gives consumers the right to ask emailers to stop spamming them. Failure to comply with the CAN-SPAM Act can result in decreased deliverability (i.e. your messages get flagged as spam), placement onto an ISP's or spam filter's blacklist, and a potential $11,000 fine. Additionally, we will eventually remove you as one of our customers if violations of the CAN-SPAM Act persist.

Cart Recovery

Cart Recovery allows you to identify and capture contacts that have placed items in the shopping cart without completing their order, including cart details.
Character Set

A character set is a collection of characters with a defined set of rules, or encoding, that interprets and determines how those characters will be displayed. Because different character sets use unique encoding rules, it's important that you specify the character set your file uses when you upload contact data. If you specify the wrong character set for a contact import then the incorrect file encoding rules will be applied and your contact data will be incorrectly formatted in Bronto.

Clicks (Email)

The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through

Clicks (Facebook)

The Facebook clicks metric represents the total clicks recorded for a Facebook message or post.

Note: In order to track clicks for a Facebook message, you need to have enable URL shortening and tracking. For instructions on how to do this, see Create A Facebook Message on page 251.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Clicks (Twitter)

The Twitter clicks metric represents the total clicks recorded for a Twitter message or post. A click is recorded for a Twitter message or post when a Twitter user clicks a link contained in one of your Twitter posts.

Clicks Per Day (Shortened URLs and QR Codes)

The clicks per day metric represents the average number of clicks recorded per day.

Clicks Per Link

The clicks per link metric is a link centric metric that represents the clicks (unique clicks) recorded for a link contained in a particular message, delivery, A/B split test, automated message rule, or delivery group. This metric can be viewed in the table at the bottom of detailed click reports for a message, delivery, automated message rule, A/B split test, or delivery group. A click per link is recorded the first time a a link is clicked. If a link is clicked 9 times, 1 click per link will be recorded for that link. If 5 different links are each clicked 10 times, then 1 click will be recorded for each of the 5 links.

Clicks Per Month (Shortened URLs and QR Codes)

The clicks per month metric represents the average number of clicks recorded per month.
Clicks Per Week (Shortened URLs and QR Codes)
The clicks per week metric represents the average number of clicks recorded per week.

Click Rate
The click rate represents the number of unique clicks that were recorded, as compared to the number of unique opens recorded. DMA/EEC equivalent: Click to Open Rate (CTO)

Click Rate (SMS)
The Click Rate (SMS) metric represents the percentage of clicks that were recorded for an SMS message. The Click Rate (SMS) metric gives you an indication of how effective the SMS you sent was at getting contacts to click the links contained therein.

Click Through Rate
The click through rate represents the number of clicks that were recorded, as compared to the number of emails delivered.

Comments (Facebook)
The Facebook comments metric represents the total number of comments recorded for a Facebook message or post.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Complaint
Email complaints occur when an unsubscribed user elects to fill out a Complaint Webform or when one of your contacts submits an unsolicited email complaint via an inbound email to our abuse team or through an ISP feedback loop.

Complaint Rate
The Complaint Rate metric represents the percentage of contacts that were lost (made inactive) by complaining via an ISP feedback loop, or via the application.

Contact
A contact is a unique email address and/or mobile number in your account.

Contact Fatigue
Contact fatigue is characterized by your contacts feeling that they are receiving too many emails from you. Even if your list is entirely subscription based (aka opt-in), sending too many emails can annoy your customers and ruin the effectiveness of your e-mail marketing campaign.
**Contact Loss**

The contact loss metric represents the total number of contacts that were marked as inactive and can no longer receive marketing emails from you as a result of this email. For more information on the inactive status type, see Contact Status on page 1083.

**Contact Loss Rate**

The contact loss rate represents the percentage of contacts that were marked as inactive and can no longer receive marketing messages from you as a result of the email you sent them.

**Contact Updates Metric**

The contact updates metric represents the number of times a contact updated their information using a manage preferences link contained in an email you sent them.

**Content Tag**

A content tag is similar to an email template. You can save an entire message as a content tag or you can design content tags using the content tag editor. Content tags can be used again and again in your messages.

**Contact Update Rate**

This metric represents the percentage of contacts who updated information using a manage preferences link contained in the email compared to the number of contacts who were sent the email. This is important because a high rate can reveal an issue with the accuracy of your contact data. If you notice that the contact updates number is high, dig a little deeper and find out what updates contacts make using the manage preferences page. Depending on these actions, you may need to rework the content of the email, or reevaluate the lists or segments you've sent to.

**Contacts Who Shared Metric**

The contacts who shared metric represents the number of contacts who used the social sharing links contained in the email. For example,

- Contact A clicks the Facebook sharing link
- Contact B clicks the Twitter and LinkedIn sharing links
- Contact C clicks the Facebook and Twitter sharing links

Then 3 is recorded for the Contacts Who Shared metric.

- **Note:** Forward to a friend URLs are not included in the total social shares metric.
- **Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116.

**Conversions**

The conversions metric represents the unique conversions that have been recorded. Conversions track when a contact performs an action as a result of an email you send them, such as making purchases, making donations, or downloading a whitepaper. A unique conversion is only recorded the first time an action from an email is performed.
If a contact buys something from you via an email you send them, and then later on purchases something from you via that same email, then only 1 unique conversion is recorded.

**Conversion Rate**

The conversion rate represents the percentage of conversions made, as compared to the number of clicks recorded. The calculation does not take into account the history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a day prior to the starting date of the report are included in the calculation. For example, a contact may have clicked on a message on a previous day, but converted on a day within the report range.

**Conversion/Delivered Rate**

The conversion/delivered rate represents the percentage of conversions made, as compared to the number of emails delivered.

**Coupon Manager**

Coupon Manager is an easy way to generate unique coupon codes and keep track of the coupon codes you use in your marketing campaigns.

**Dashboard Widget**

Bronto provides a library of widgets that you can drag and drop on to dashboards in order to display the information and metrics that matter to you.

**Deferred Due To Message Content (Soft Bounce Type)**

Deferred due to message content is quite similar to the rejected message content bounce. Emails aren't often identified this way, as ISPs don't want you to resend something they identify as spam.

**Deliverability Rate**

The deliverability rate metric represents the average number of sent emails that are successfully delivered to your contacts. Another way to look at it is as the average of all the delivery rates for all the email deliveries in your account.

**Delivered (Emails)**

The emails delivered metric represents the total number of emails that were successfully delivered. DMA/EEC equivalent: Accepted

**Delivered (SMS)**

The Delivered (SMS) metric represents the total number of SMS messages that were successfully delivered.
**Delivery**

A delivery is a collection of all the emails or SMS messages sent to a particular group of contacts at a particular time. When you schedule a delivery, emails or SMS messages are sent to your contacts according to the settings you choose for the delivery.

*Note:* A delivery is not the same thing as a message or an email.

**Delivery Group**

Delivery groups are collections of deliveries and posts grouped together for the purposes of segmenting and reports. You can add individual deliveries, posts, messages, or automated message rules to a delivery group.

**Delivery Rate**

The delivery rate represents the percentage of emails that were successfully delivered, as compared to the total emails that were sent. DMA/EEC equivalent: *Accepted Rate*

**Delivery Rate (SMS)**

The *Delivery Rate (SMS)* metric represents the percentage of SMS messages that were successfully delivered.

**Delivery Rating**

The delivery rating is calculated on a per email delivery basis, rather than on the total email deliveries you have sent. The email delivery rating is driven by complaints an email delivery receives from ISP feedback loops, the level of contact engagement (opens, clicks, conversions) the email has, and our internal measurement thresholds.

**Delivery Type**

The delivery Type represents the type of send. Each type is described below:

- *Normal* - The *Normal* email delivery type represents a regular email delivery sent to more than one contact.
- *Bulk* - The *Bulk* email delivery type represents email messages that were sent in bulk and includes normal deliveries and split deliveries.
- *Skipped* - The *Skipped* email delivery type represents email messages that were skipped by Bronto and not sent.
- *Single Contact* - The *Single Contact* email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as *Single Contact*, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.
- *Test* - The *Test* email delivery type represents email deliveries that were sent as test deliveries.
- *AMR* - The *AMR* email delivery type represents email deliveries that were sent via an *Automated Message Rule*.
- *Split Group* - The *Split Group* email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.
- *FTAF* - The *Forwards to a Friend* email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.
- *Transactional* - The *Transactional* email delivery type represents email deliveries were sent as transactional emails.
**Destination System Unreachable (Hard Bounce Type)**

The destination system unreachable hard bounce type means that there was a connection issue with the email server.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

**Destination System Temporarily Unreachable (Soft Bounce Type)**

Destination system temporarily unreachable soft bounce type means that there was a temporary issue at the receiving mail server, such as a server busy message.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

**Digg Shares (Metric)**

The Digg shares metric represents the total number of times Digg social sharing links contained in emails you sent were clicked. For example, if a contact clicks the Digg social sharing link 10 times, then 10 would be recorded for the Digg shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

**Digg Views (Metric)**

The Digg views metric represents the total number of times an email shared via a Digg social sharing link was viewed.

Note: Digg views will be counted for anyone that views the email shared via the Digg social sharing link, not just contacts in your account.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

**DomainKeys Identified Mail (DKIM)**

DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email. This digital signature is verified by the receiving mail server to ensure that it is not forged. To enable DKIM, you must enable Sender Authentication when scheduling an email message to be sent. DKIM can optimize your email message delivery to Hotmail, MSN, and Yahoo! email addresses.

**Double Opt-in**

Double opt-in means a contact has subscribed via an explicit request and also confirmed the validity of their email address. You can only send one double opt-in message per contact. Bronto does not require double opt-in but it is a best practice.

**Drip Campaign (aka Waterfall Campaign)**

Drip campaigns (aka waterfall campaigns) are a powerful tool that you can use to automatically send messages to your contacts on a scheduled basis.
**Dynamic Code**

Dynamic Code is the language behind Dynamic Content. The code that is added to messages when you add Dynamic Content via the Dynamic Content Wizard is an example of Dynamic Code. You can add Dynamic Code directly to the content of SMS messages and HTML email messages. Dynamic Code allows you to have more control over the behavior of Dynamic Content.

**Dynamic Content**

Dynamic content is an advanced feature that allows you to add content to messages based on whether or not certain conditions are met.

**Dynamic Preview**

Dynamic Preview allows you to preview an email message or an SMS message as if you were a specific contact in your account.

**Email**

An email is the actual thing that arrives in a contact's inbox. The email was created from a message and sent when a delivery was scheduled.

**Email Frequency Caps**

Email frequency caps allow you to specify the maximum number of emails that can be sent to your contacts over given time periods. This is a valuable resource if you are sending automated messages, because you no longer have to worry about automated messages, promos, and other marketing efforts overwhelming your contacts and inducing what is known in email marketing as “contact fatigue”.

**Email Orders**

The *Email Orders* metric represents orders made from emails you sent from the application. These orders are the result of a contact clicking through an email you sent them and then placing an order. These orders have specific emails sent from the application associated with them. When a contact places an order as a result of being sent an email, a conversion is recorded. From a single conversion, multiple orders can be made. It is possible to have more orders than conversions. For example, if a contact clicks from an email to your site, purchases a shirt, and then also decides to purchase a hat, that could represent 2 orders made from 1 conversion.

**Email Revenue**

The *Email Revenue* metric represents the total revenue tracked for emails sent from the application. This revenue is tied to specific emails sent from the application.

**Error Correction Level (QR codes)**

The higher the error correction level, the more likely the QR code will be able to properly read (or scanned) even if the code is damaged. However, the higher the error correction level, the larger the QR code image is.
External Name (List)

The external name is the name that will appear to your contacts if you make this list visible on a webform.

Facebook Shares (Metric)

The Facebook shares metric represents the total number of times the Facebook social sharing links contained in emails you sent were clicked. For example, if a contact clicks the Facebook social sharing link 10 times, then 10 would be recorded for the Facebook shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Facebook Views (Metric)

The Facebook views metric represents the total number of times an email shared via a Facebook social sharing link was viewed.

Note: Facebook views will be counted for anyone that views the email shared via the Facebook social sharing link, not just contacts in your account.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

Feedback Loops

ISP feedback loops are services provided by some ISPs which allow us to receive notices when a contact clicks a Spam or Unsubscribe button in their email client.

Fields

Fields allow you to store additional information about your contacts - first name, postal code, age, etc. You can also use fields to personalize your messages and segment your lists. It's important to note that any field used in a message must be smaller than 1 MB in size.

Field Tags

Field tags use the contact data stored in Bronto contacts fields to populate email and SMS message content. At message send time Bronto looks up the value stored for the contact field for and replaces the field tag with the saved data specific to a contact.

Filter Node (Workflows)

You can use filter nodes to refine the actions of a workflow. For example, you can limit an action to the first 100 people who reply to a contest or to a group of people on a particular list or segment. A workflow can have multiple filter nodes.
First Order (Contacts)
The date of the first order recorded for the contact.

Forwards To A Friend (Metric)
The forwards to a friend metric represents the total number of times a contact forwarded an email you sent them using the forward to a friend link.

Tip: For more information on adding a forward to a friend link to your message, see Insert A Link To A Webform Using The WYSIWYG Editor on page 114. For more information on forward to a friend webforms, see Types of Webforms on page 204.

Frequency Caps (Email Frequency Caps)
Email frequency caps allow you to specify the maximum number of emails that can be sent to your contacts over given time periods. This is a valuable resource if you are sending automated messages, because you no longer have to worry about automated messages, promos, and other marketing efforts overwhelming your contacts and inducing what is known in email marketing as “contact fatigue”.

Frequency Caps (SMS)
The monthly frequency cap setting defines the maximum number of SMS deliveries that can be sent to a given keyword over a rolling 31 day period. Best practices dictate you should limit SMS deliveries to 30 or less per month for a given keyword.

Frequency Caps Skipped (Metric)
The frequency cap (skipped) metric represents the number of contacts that were not sent to because doing so would exceed the email frequency cap settings you have in your account.

Tip: For more information on the email frequency cap settings, see Set Email Frequency Caps For Your Account on page 1330.

From Complaint (Metric)
The Complaint (From Complaint) metric represents the total number of contacts that were lost (made inactive) by complaining via either an ISP feedback loop, or the application's complaint system.

From Complaint - Bronto Feedback (Metric)
The From Complaint - Bronto Feedback metric represents the number of contacts that were lost (made inactive) by complaining using a Complaint webform.

Warning: A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see Sender and Delivery Rating on page 309.

Tip: For more information on fixing a low sender or delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.

Tip: For more information on Complaint webforms, see Types of Webforms on page 204.
From Complaint - ISP Feedback (Metric)

The From Complaint - ISP Feedback metric represents the number of contacts that were lost (made inactive) by complaining via an ISP feedback loop.

⚠️ **Warning:** A high number of complaints will negatively impact your sender and delivery rating. For information on sender and delivery rating, see Sender and Delivery Rating on page 309.

⚠️ **Tip:** For more information on fixing a low sender or delivery rating, see Tips For Fixing A Low Email Sender/Delivery Rating on page 311.

From Unsubscribes Metric

The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.

⚠️ **Tip:** For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

FTAF (Email Delivery Type)

The Forwards to a Friend email delivery type represents email deliveries that were sent as part of a FTAF webform. FTAF deliveries do not appear in delivery groups.

GeoIP City (Per Contact Metric)

The GeoIP City metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the city where they reside or the location of the most recent open/click. It also does not take into account any city data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

GeoIP Country (Per Contact Metric)

The GeoIP Country metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the country where they reside or the location of the most recent open/click. It also does not take into account any country data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

GeoIP Country Code (Per Contact Metric)

The GeoIP Country Code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. Country codes are alphanumeric geographical codes (geocodes) used to represent countries and dependent areas.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.
**GeoIP State/Region (Per Contact Metric)**

The GeoIP State/Region metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the state/region where they reside or the location of the most recent open/click. It also does not take into account any state/region data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

**GeoIP Time Zone (Per Contact Metric)**

The GeoIP Time Zone metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. This means the IP that is returned is the IP that occurs most in that 14 day period. It does not necessarily indicate the time zone where they reside or the location of the most recent open/click.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

**GeoIP Zip (Per Contact Metric)**

The GeoIP Postal/ZIP code metric is based on the most frequent, non-mobile IP address recorded for a contact in the 14 days prior to the most recent open/click activity. It does not necessarily indicate the Postal/ZIP code where they reside or the location of the most recent open/click. It also does not take into account any Postal/ZIP code data that might be stored in fields.

For example, if the last open or click activity was on March 30, the IP address that is returned is the IP address associated with the most clicks/opens from March 19 - March 30.

**GSM**

GSM is the approved character set used in SMS messaging.

**Hard Bounce**

Hard bounces are permanent delivery failures. For example, the mailbox and/or domain does not exist for an email address. The from hard bounce metric represents the number of sent emails that were not delivered due to hard bounces.

**Inactive Due To Bounces Metric**

The inactive due to bounces metric represents the total number of contacts that were made inactive because they exceeded the bounce limit you have set in your account. The bounce limit represents the number of times emails sent to a particular contact can consecutively bounce before the contact is made inactive. Once a contact is made inactive, you can no longer send to them until they once again opt-in to receiving marketing emails from you.

**Incoming (SMS)**

The Incoming (SMS) metric represents the total number of times contacts replied to an SMS message you sent them.
Note: Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

### Incoming Rate (SMS)

The * Incoming Rate (SMS)  metric represents the percentage replies recorded for an SMS message.

Note: Once an initial SMS is received, the person begins an SMS session which lasts for 1 hour. During the life of the session, any additional SMS messages received from that person are considered SMS replies. If you receive an SMS from a person and no session exists, the SMS you receive will be treated as an initial incoming SMS and will be picked up by the Initial Incoming SMS With Keyword trigger node.

### Internal Name (List)

The internal name that you assign to your list is only visible to users within your account.

### ISP Feedback Loop

ISP feedback loops are services provided by some ISPs which allow us to receive notices when a contact clicks a *Spam* or *Unsubscribe* button in their email client.

### Keyword (SMS)

SMS keywords are words or names used to distinguish SMS messages on a given short code. Your account will have one short code, but you could have many keywords. This allows you to have keywords for different types of content you want to provide. For example, you could have a keyword for a big sale you are having, and another keyword for mobile updates you provide. There are two types of SMS keywords:

- **Subscription** - Subscription based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.

- **Basic or Non Subscription** - Basic, or non-subscription based keywords, are meant for individual transactional interactions. With non-subscription based keywords, a recipient texts in to a keyword and a response is sent back. The interaction ends there. The recipient is not added to a list because they have not agreed to receive future marketing messages from you.

### Labels

Labels allow you to group objects in the platform together in order to sort and compare related data. After a label is created you have the option of color coding the label so that you can use label colors to quickly identify related lists. You can also filter lists using labels and label colors.

### Last Order (Contacts)

The date of the last (or most recent) order recorded for the contact.
Likes (Facebook)

The Facebook likes metric represents the total number of times Facebook users liked a Facebook message or individual post.

Note: Due to the way Facebook's API works, it may take up to 24 hours for metrics from Facebook to appear.

LinkedIn Shares Metric

The LinkedIn shares metric represents the total number of times the LinkedIn social sharing links contained in emails you sent were clicked. For example, if a contact clicks the LinkedIn social sharing link 10 times, then 10 would be recorded for the LinkedIn shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

LinkedIn Views Metric

The LinkedIn views metric represents the total number of times an email shared via a LinkedIn social sharing link was viewed.

Note: LinkedIn views will be counted for anyone that views the email shared via the LinkedIn social sharing link, not just contacts in your account.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

Lists

Lists are static groups of contacts that are great for high-level organization of your contacts. You will want to think about multiple lists for different departments, different goals, etc. You might even break out your audience into opted-in and not yet opted-in lists.

Loop Tags

API loop tags are specially formatted API message tags that allow content to be passed in via API Message tags as an array. This an especially useful feature to use with transactional email messages. For example, if you are using transactional email messages to send receipts and you need to send back a receipt containing multiple purchases (say if a contact purchases more than one item from you during a single visit), you can use loop tags to create an array containing the relevant receipt information for each item purchased.

Message

A message is the actual design and content for an email, SMS message, Facebook post, or Twitter post created in the application. A message can be scheduled and sent to your contacts in the form of deliveries (Email and SMS) or posts (Facebook and Twitter). Messages can, and often do, have multiple deliveries or posts associated with them.

Mobile Browser (Per Contact Metric)

The mobile browser metric represents the mobile browser (Safari mobile, Android, Firefox mobile, etc.) used by a contact.
Mobile Email Client (Per Contact Metric)

The mobile email client metric represents the mobile email client (Gmail mobile, Yahoo Mail for mobile, etc.) used by a contact.

Multi-Part Messages (SMS)

The Multi-Part Messages (SMS) metric displays the number of SMS messages that exceeded the 160 character limit and were split in to multiple parts. Each part the message is split in to will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.

Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

Multi-Part Recipient (SMS)

The Multi-Part Recipients (SMS) metric displays the number of recipients who were sent an SMS message that was split in to multiple parts due to the message content exceeding the 160 character limit. Each message split will count against your allocation. This is important to know for allocation reasons, and for examining the content of your SMS messages.

Note: SMS messages are limited to 160 characters. If the content of the message exceeds the 160 character limit, the message will be split and sent as multiple messages. SMS messages containing one or more non-GSM characters are limited to 70 characters. If the message contains non-GSM characters, the character limit will change from 160 to 70. If the content of the message exceeds the character limit, the message will be split and sent as multiple messages. Each message will count against your SMS allocation. A bounced SMS message does not count against your SMS allocation.

MySpace Shares Metric

The MySpace shares metric represents the total number of times the MySpace social sharing links contained in emails you sent were clicked. For example, if a contact clicks the MySpace social sharing link 10 times, then 10 would be recorded for the MySpace shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.

MySpace Views Metric

The MySpace views metric represents the total number of times an email shared via a MySpace social sharing link was viewed.

Note: MySpace views will be counted for anyone that views the email shared via the MySpace social sharing link, not just contacts in your account.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.
**Net Response Rate**

Net Response Rate is a composite metric that represents open rate times click through rate times conversion rate. This is important because it represents the most comprehensive performance of your email content as it relates to opens, click throughs, and conversions from end-to-end.

**Node Connections (Workflows)**

After you add nodes to the workflow canvas, you need to connect them. There are two types of node connections, outgoing and incoming. Outgoing connections are represented by a green, orange, or blue circle at the bottom of a node. You can click on one of the outgoing connections, and drag it to a node with an incoming connection to connect two nodes together. Incoming connections are represented by a gray dot at the top of a node.

**Node Settings (Workflows)**

Once you have added nodes and node connections to a workflow, you can begin editing settings for each node. When you drag a node on to the canvas, certain text in the node will be **bold**. Each piece of bold text represents a given node setting. Clicking on the bold text will allow you to change the setting. Node settings are the details for a given node that describe what should happen at that particular point in the workflow. For example, if you add the **Email Was Sent** node to the workflow canvas, you will then pick a message in your account.

**Normal (Email Delivery Type)**

The **Normal** email delivery type represents a regular email delivery sent to more than one contact.

**Onboarding (Contact Status)**

Contacts with a status of Onboarding are new contacts who are waiting to be sent their first marketing email from you. Once they are sent their first marketing email from you, they will enter the automated onboarding process. After they complete the automated onboarding process, their status is switched to Active.

**Onboarding Skipped (Metric)**

The onboarding (skipped) metric represents the total number of contacts that were not sent to because doing so would exceed the number of contacts with a status of onboarding you can send to at this time. If you are continually seeing a high number of contacts skipped due to onboarding, it could mean you are trying to import a bad list. If you are importing a healthy list, contacts should very quickly move from onboarding to active. So, if you are continually seeing high numbers under onboarding (Skipped), you should re-examine the contacts you are importing or adding.

**Tip:** For more information on the automated onboarding process, see **Automated Onboarding** on page 1081.

**Opens**

The opens metric represents the *unique opens*. A unique open is recorded the first time a contact opens an email. If a contact opens an email 5 times, only 1 unique open is recorded. DMA/EEC equivalent: **Unique Renders**
Open Rate

The open rate represents the percentage of emails that were opened, as compared to the number of emails that were successfully delivered. DMA/EEC equivalent: Render Rate The calculation does not take into account the send history for individual messages. Therefore, on Over Time and Date Range reports, it is possible for the rates to equal a value greater than 100% if enough messages sent on a date prior to the start of the report are included in the calculation. For example, a message was sent 100 times a previous day and 100 times on a date within the report range. The message is opened 125 times within the report range. In this case, the Open Rate on the report is 125% because the message was opened more times than it was sent.

Operating System (Per Contact Metric)

The operating system (mobile or desktop) used by a contact (MacOSX, WinXP, Win7, Android, iOS, etc.)

Order ID

The order ID represents the unique identifier for a particular order. SKU IDs represent the IDs for individual products that make up an order. Orders are not required to have SKU IDs associated with them. If the Order has one SKU ID associated with it, there will be a backslash between the order ID and the SKU ID, with the order ID appearing on the left. If the order contains more than one SKU ID, there will be an arrow to the left of the order ID that you can click to drill-down and view the SKU IDs for the order.

Orphaned Contacts

Orphan contacts are contacts that are not on any lists. (i.e. they are in your account, but they are not associated with any of your lists).

Other Orders

The Other Orders metric represents orders that did not directly result from emails you sent from the application. You can pass in order data for contacts that is not associated with a specific delivery.

Other Revenue

The Other Revenue metric represents revenue that did not directly result from emails you sent from the application. You can pass in revenue data for contacts that is not associated with a specific delivery.

Percent Of Total Clicks

The percent of total clicks metric represents the percentage of times a specific link was clicked, compared to the total number of clicks recorded for the message, delivery, A/B split test, automated message rule, or delivery group.

Pop-Up Manager

Pop-Up Manager is used to design pop-up messages that can capture the email addresses of people who visit your site.
**Posts (Facebook and Twitter)**

A post is a collection of all the Facebook or Twitter posts posted to a Facebook or Twitter account you have integrated with.

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**Primary Browser (Per Contact Metric)**

The primary browser metric represents primary browser (Firefox, Chrome, Safari, etc.) used by a contact. This includes mobile and non-mobile browsers.

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**Primary Email Client (Per Contact Metric)**

The primary email client metric represents primary email client (Microsoft Outlook, Mozilla Thunderbird, Apple Mail, etc.) used by the contact. This includes mobile and non-mobile email clients.

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**Quantity (Orders)**

The total number of products purchased per order and SKU ID. For an order, the quantity represents the number of products purchased in the order. If there is only one product SKU ID for the order, the quantity will represent the total number times that specific product was purchased in the order. If the order contains multiple product SKU IDs, you can drill-down to each SKU ID to see the total number of products purchased for each SKU ID. If a contact purchases more than one of a specific product, you will see the number purchased and the unit price for the product. For example, 3 @ $10.00

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**Recommendations**

A recommendation is a list of items from your product catalog that meet a set of criteria that you define as you build a recommendation. When you use a recommendation in a message, what products best match its criteria are determined at the time a message is sent.

There are two versions of the Recommendations app - Standard, which can build recommendations based on what Bronto knows about your products and Premium, which can build recommendations based on what Bronto knows about your products and contacts' order and browse history.

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**Rejected Due To Message Content (Soft Bounce Type)**

The rejected due to message content hard bounce type means that the email server has identified the email as spam.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

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**Remail**

Remails (also know as remarketing) allow you to send a follow-up email to contacts as a reminder or to persuade them to continue along the conversion process.

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**Remarketing**

Remails (also know as remarketing) allow you to send a follow-up email to contacts as a reminder or to persuade them to continue along the conversion process.
Replies (Twitter)

The Twitter replies metric represents the total number of times users on Twitter replied to a post you made to Twitter. A Twitter user can choose to reply directly to your account via a Twitter post they receive from you by clicking Reply in Twitter.

Reply Tracking

Enabling Reply Tracking will store a copy of all email replies to your email messages on the Email Replies page. You may find this option convenient if you need someone other than the email address in the From line to read email replies, or simply want the application to store email replies.

Retweets (Twitter)

The Twitter retweets metric represents the total number of times a Twitter post is retweeted. When a message is posted to Twitter, Twitter users can retweet the post and share it with all of their followers.

Total Revenue

The Total Revenue metric represents the total amount of revenue tracked. It is a sum of the Email Revenue and Other Revenue metrics.

Revenue Per Contact

The total amount of revenue recorded for the contact.

Revenue Per Email

The Revenue Per Email metric represents the average revenue tracked for an email successfully delivered from your account.

Revenue Per Order

The Revenue Per Order metric represents the average revenue generated per order tracked in your account.

RFM

Recency, Frequency, Monetary metrics

RSS

RSS (Really Simple Syndication) technology allows internet users to subscribe to websites that provide RSS feeds. For example, in addition to reading the news headlines via email, you can read the latest news through bookmarks in your web browser, or through a RSS reader.
Segment
When you build your segment, you are setting criteria to use to dynamically associate contacts. For example, you can create a segment containing contacts from Chicago that opened the previous message you sent them. Contacts automatically move on and off of segments based on whether or not they match the criteria associated with a segment.

Sent (Emails)
The emails sent metric represents the total number of emails that were sent.

Note: Deleted email deliveries will still be counted as part of the emails sent metric.

Send Time Optimization (STO)
You should avoid using send time optimization for time sensitive deliveries where you want to control when email is sent.

Sender Authentication
Checking the Enable Sender Authentication box will sign your email message with DomainKeys Identified Mail (DKIM). DomainKeys is an authentication technology, developed by Yahoo!, that works by creating a digital signature of the contents of an email. This digital signature is verified by the receiving mail server to ensure that it is not forged. To enable DKIM, you must enable Sender Authentication when scheduling an email message to be sent. DKIM can optimize your email message delivery to Hotmail, MSN, and Yahoo! email addresses.

Sending Max (Onboarding)
The Sending Max represents the maximum number of contacts with a status of Onboarding that you can currently send to.

Sender Rating
Your sender rating is driven by the level of contact engagement (opens, clicks, conversions) your sent emails that were received, complaints your emails receive from ISP Feedback Loop, and internal measurements that we use to help you optimize your deliverability.

Short Code (SMS)
An SMS short code is basically a short version of a phone number associated with SMS messages you send. It allows recipients of an SMS message to identify where the SMS message is from, and also allows them to respond (subscribe, unsubscribe, etc.) The default short code for US and Canada is 33233 and the default for the UK is 63233. If your account does not use a default short code, you can view your short code by going to Home > Settings > SMS Integration.
**Single Contact (Email Delivery Type)**

The *Single Contact* email delivery type represents emails deliveries that were sent to only a single contact. Email deliveries sent via workflows are always marked as *Single Contact*, but this delivery type also includes email deliveries manually sent to a single contact or sent to a single contact via the API.

**Single Recipients (SMS)**

The *Single Recipients (SMS)* metric represents the count of recipients receiving a single SMS message. You can compare this metric with the *Multi-Part Recipients (SMS)* metric to find out the *Total Recipients (SMS)* metric.

**Skipped (Email Delivery Type)**

The *Skipped* email delivery type represents email messages that were skipped by Bronto and not sent.

**SKU (Orders)**

SKU IDs represent the IDs for individual products that make up an order.

**SMS Messages**

SMS messages are mobile or text messages you can send to your contacts.

**Social Views Metric**

The social views metric represents the total number of times an email shared via social sharing links was viewed.

- **Note:** Views will be counted for anyone that views the email shared via social sharing links, not just contacts in your account. Forward to a friend URLs are not included in the social shares metric.

- **Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116.

**Socialite**

Socialite allows you to connect your Bronto contact data to your social media accounts in order to drive list growth and revenue.

Socialite is used to pass contact information between Bronto and your Facebook account.

**Soft Bounce**

Soft bounces are temporary delivery failures. A soft bounce may occur if a contact's inbox is full, or the receiving email server is down.

- **Tip:** For more information on the bounce classification system, see Email Bounce on page 196.
Special Tags

Special tags represent the default tags that we provide in your account. When an email or SMS message is sent, special tags are replaced with data from your account.

Split Group (Email Delivery Type)

The Split Group email delivery type represents email deliveries that were sent as part of an A/B split test. If you hover over the Split Group text, a tool-tip will appear that contains the name of the split group.

Subscription Keywords (SMS)

Subscription based keywords require a contact to choose to receive SMS messages from you (via a webform or by texting in to a given keyword). Contacts who subscribe to a subscription based keyword will be added to a list so that you can send SMS messages to them in the future.

Suppression List

When an email address is added to the suppression list, you will not be able to:

• Send messages to this contact.
• Import this email address as part of a contact import.
• Manually add a contact with this email address to your account.

Temporary Contact Issue (Soft Bounce Type)

Temporary contact issue means that there was a temporary issue at the receiving mail server with respect to the contact in question. An example of this is a mailbox full message.

Tip: For more information on the bounce classification system, see Email Bounce on page 196.

Test (Email Delivery Type)

The Test email delivery type represents email deliveries that were sent as test deliveries.

Text-To-Join

Text-To-Join allows you to grow your email-marketing list by providing a way for potential contacts to text their email address to a short code and be automatically added to one of your lists.

Total Clicks

The total clicks metric is a contact centric metric that represents the total number of times contacts clicked links contained in the email you sent them. If Taylor Doe

• clicks link A 10 times
• and clicks link B 5 times

And Taylor Doe
• clicks link B 5 times

Then 20 total clicks are recorded.

**Total Clicks (SMS)**

The **Total Clicks (SMS)** metric represents the total number of times links contained in an SMS message were clicked.

**Total Clicks Per Link**

The total clicks per link metric represents the total number of times a specific link was clicked in a particular message, delivery, A/B split test, automated message rule, or delivery group. If a contact clicks link A in your message 10 times, then 10 clicks would be recorded for that particular link.

**Total Opens**

The total opens metric represents the total number of opens recorded for a particular message, delivery, A/B split test, automated message rule, or delivery group. If contact Alex Example opens an email you sent them 5 times, and contact Jayne Example opens an email you sent them 10 times, then 15 would be recorded for the total opens metric.

Note: The total opens metric is not the same thing as the opens metrics (which records unique opens). For more information on the opens metric, see **Opens Metric** on page 882.

**Total Orders**

The **Total Orders** metric represents the total number of orders tracked in your account. It is a sum of the Email Orders and Other Orders metrics.

**Total Orders Per Contact**

The total number of orders recorded for the contact.

**Total Recipients (SMS)**

The **Total Recipients (SMS)** metric represents the total count of recipients who received an SMS message.

**Total Sent (SMS)**

The **Total Sent (SMS)** sent metric represents the total number SMS messages sent. The **Total Sent (SMS)** metric is important to know for the purpose of making sure you don't exceed the number of SMS messages allocated for your account.

**Total Social Shares Metric**

The total social shares metric represents the total number of times social sharing links contained in the email were clicked. For example, if one contact uses the Twitter social sharing link, and another contact uses the Facebook social sharing link, then 2 would be recorded for the total social shares.

Note: Forward to a friend URLs are not included in the total social shares metric.
Throttling

Throttling slows your email delivery speed, and thus spreads your email deliveries out over time. For example, instead of sending your email message to 100K contacts as quickly as possible, throttling will spread the delivery over a period of 8 hours.

Transactional (Contact Status)

Contacts with a status of Transactional can only be sent transactional emails. A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

Transactional (Email Delivery Type)

The Transactional email delivery type represents email deliveries were sent as transactional emails.

Transactional Deliveries

A transactional email facilitates an agreed-upon transaction, or updates a customer in an existing business relationship. The primary purpose of the email must be transactional in both the subject line and body. It is permissible to mix in a marketing message/offer in the body. But if a marketing message/offer is added it cannot be the primary purpose of the email and must be included after the transactional content. The marketing portion can be up to 50% of the message as long as it is below the transactional content in the message. Examples of transactional emails include order confirmations, shipping notices, changes in account status, etc. Transactional emails are exempt from CAN-SPAM compliance in the US, but we suggest that all transactional emails adhere to our suggested best practices.

Trigger Node (Workflows)

Each workflow can only have one trigger node. This table describes all possible trigger nodes and provides links to the topics for using each individual node.

Twitter Shares Metric

The Twitter shares metric represents the total number of times the Twitter social sharing links contained in emails you sent were clicked. For example, if a contact uses the Twitter social sharing link 2 times, then 2 would be recorded for the Twitter shares metric.

Tip: For more information on social sharing links, see Social Share Links in Emails on page 116.
Twitter Views Metric

The Twitter views metric represents the total number of times an email shared via a Twitter social sharing link was viewed.

- **Note:** Twitter views will be counted for anyone that views the email shared via the Twitter social sharing link, not just contacts in your account.
- **Tip:** For more information on social sharing links, see Social Share Links in Emails on page 116.

Unclassified

The unclassified metric represents the number of bounces that could not be classified using our bounce classification system. We try our best to classify bounces and keep from showing them as unclassified so that you can better understand why bounces are occurring.

Unconfirmed (Contact Status)

Contacts with a status of Unconfirmed have not yet agreed to receive marketing emails from you. Remember, one of our policies is that contacts must agree to receive marketing emails from you in order for you to send to them.

Undeliverable (Email)

The email undeliverable metric represents the number of sent emails that were not delivered.

Undeliverable (SMS)

The Undeliverable (SMS) metric represents the number of sent SMS messages that were not delivered.

Undeliverable Rate (SMS)

The Unique Clicks (SMS) metric is the sum of all the unique clicks recorded for an SMS message. A unique click is recorded the first time a contact clicks any link contained in an SMS you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.

- **Note:** The Unique Clicks (SMS) metric if not the same as the Total Clicks (SMS) metric. For more information on the Total Clicks (SMS) metric and how it is calculated, see SMS Total Clicks Metric on page 890.

Unique Clicks (Same As Clicks)

The clicks metric is a per contact metric that represents the unique clicks recorded. A unique click is recorded the first time a contact clicks any link contained in an email you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded and 1 would appear under the clicks metric. DMA/EEC equivalent: Click Through
Unique Clicks (SMS)

The Unique Clicks (SMS) metric is the sum of all the unique clicks recorded for an SMS message. A unique click is recorded the first time a contact clicks any link contained in an SMS you send them. If a contact clicks a link 9 times, 1 unique click will be recorded. If 2 contacts each click a link 10 times, then 2 clicks will be recorded. If a single contact clicks 5 different links, than 1 unique click is recorded.

Note: The Unique Clicks (SMS) metric if not the same as the Total Clicks (SMS) metric. For more information on the Total Clicks (SMS) metric and how it is calculated, see SMS Total Clicks Metric on page 890.

Unsubscribe Rate Metric

The Unsubscribe Rate metric represents the percentage of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.

Tip: For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

Unsubscribed (Contact Status)

Contacts with a status of Unsubscribed have either unsubscribed themselves from receiving marketing emails from you, or were unsubscribed by you. Contacts can unsubscribe themselves by clicking an unsubscribe link, or by manually marking an email from you as spam in their inbox. When a contact is unsubscribed, their status changes to Unsubscribed. When their status is changed to Unsubscribed, the contact will no longer receive marketing emails from you. The contact can still receive transactional emails from you. The contact will also remain on any lists they have been added to.

Unsubscribes Metric

The unsubscribes metric represents the total number of contacts that were lost (i.e. made inactive) by unsubscribing. A contact can unsubscribe via an unsubscribe webform or a manage preferences webform.

Tip: For more information on the webforms a contact can use to unsubscribe, see Types of Webforms on page 204.

URL Tracking

You can append additional parameters onto tracking URLs.

These parameters allow you to change the way in which data is exchanged with Bronto.

Waterfall Campaign (aka Drip Campaign)

Drip campaigns (aka waterfall campaigns) are a powerful tool that you can use to automatically send messages to your contacts on a scheduled basis.

Webforms

Webforms provide you with a powerful way to sign-up new contacts, collect information from existing/future contacts, and allow your contacts to easily manage their preferences.
Workflows

Creating workflows is a simple process that involves dragging combinations of nodes (triggers, filters, and actions) on to the workflow canvas to automate certain marketing actions. The key to understanding workflows is to remember that they are centered around contacts. Contacts enter and move through workflows based on their actions or data about them. At the end of the workflow, some action is taken in regards to a contact (they are sent a message, their data is updated, etc.).

Zoom Level (QR codes)

The zoom level determines the pixel per square used in the QR code. To keep the QR code image a reasonable size, you should reduce the zoom level as the number of characters you are using in the URL increases.

Interactive Learning

Learn Bronto by using Bronto with our interactive guides and tutorials.

Bronto's Interactive Learning tools provide you with guided assistance in learning the Bronto platform. There are three types of interactive learning:

Show Me
These are page tours and short guides that introduce you to features and help answer quick questions.

A Show Me will give you an overview of the email message editor, or the basics of constructing a workflow, or help you figure out what your current orders configuration is. This requires some interaction between you and the platform in order to be able to show you things, but you will not be expected to complete or save work.

Teach Me
These are interactive walkthroughs that help you complete work as you learn to use the platform.

A Teach Me requires a lot of interaction between you, the platform, and the walkthrough. When you complete a Teach Me you will have completed a single piece of work, such as sending a message or building a segment.

Guide Me
These are comprehensive tutorials that are designed to help you master areas of Bronto.

A Guide Me is a combination of different types of learning resources - Show Mes, Teach Mes, videos, and help topics. Each Guide Me is designed so that when you complete it you will be completely set up and trained in that area. For example, when you complete Guide Me on Products, you'll have successfully imported your product data and set up Bronto to continuously imported new and updated product data.

How To Use

You can access a Show Me or Teach Me from the Learning Center tab in the platform. Each one is surfaced in the Learning Center tab relevant to the platform page or pages it related to. For example, Teach Me To Send A Message can be accessed from the Message Overview page.

You can also go to All Show Me and Teach Me Guides on page 1550 to see the full list of Show and Teach Me guides. Any guide can be launched from these tables.

All available Guide Me tutorials can be found in this Interactive Learning section of the knowledge base.
All Show Me and Teach Me Guides

The URLs in these tables can be used to launch Show Me and Teach Me guides outside of Bronto.

Some important things to know:

- This list will be updated every Wednesday around 4 PM EST with any new guides that were published since last Wednesday.
- Most of the guides break on a "clicking a button" step in Firefox. We've communicated to our third-party vendor and are waiting for them to offer a fix. Until then, we recommend that the customer launch the guide in Chrome or Safari.
- A few guides are not designed to be launched from outside of the page the guide is surfaced on. (Show Me Tables, for example.) If a guide is not in this table it falls into that category and we won't include a direct link to it.
- If you are not already logged into an account, you cannot use morph access in the process of launching a guide from a URL. This only impacts people inside of Bronto, so the customer will never have this experience. If you want to view a guide from a customer's perspective, morph into the account then use the link to launch the guide.
- If a customer is not already logged into Bronto, the guide will take them to the login screen and then begin after they log in.

Show Me

A Show Me is a page tour or short guide that introduces you to features and helps answer quick questions.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description and Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Me The Dashboard</td>
<td>Explains a few key widgets and how to add and remove widgets from the dashboard.</td>
</tr>
<tr>
<td></td>
<td><a href="https://app.bronto.com/mail/index/dashboard/?stStart=sad6fcld">https://app.bronto.com/mail/index/dashboard/?stStart=sad6fcld</a></td>
</tr>
<tr>
<td>Show Me How To See My Products</td>
<td>Explains how to view your product catalog after you have imported your products into Bronto.</td>
</tr>
<tr>
<td></td>
<td><a href="https://app.bronto.com/mail/product/index/?stStart=s9tfnanr">https://app.bronto.com/mail/product/index/?stStart=s9tfnanr</a></td>
</tr>
<tr>
<td>Show Me New Reports</td>
<td>Explains a few key, new features of new reports.</td>
</tr>
<tr>
<td></td>
<td>This guide must be launched from the Help tab on a new report page to work properly.</td>
</tr>
<tr>
<td>Show Me Webforms</td>
<td>Explains the different webform content blocks, how to add content to webforms, and how to access webform settings.</td>
</tr>
<tr>
<td></td>
<td><a href="https://app.bronto.com/mail/webform/index/?stStart=xrwk7jkq">https://app.bronto.com/mail/webform/index/?stStart=xrwk7jkq</a></td>
</tr>
<tr>
<td>Show Me How To Set Up API Access</td>
<td>Explains how to configure your account to use Bronto's SOAP and REST APIs.</td>
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<tr>
<td></td>
<td><a href="https://app.bronto.com/mail/pref/data_exchange/?stStart=wtqsenbo">https://app.bronto.com/mail/pref/data_exchange/?stStart=wtqsenbo</a></td>
</tr>
<tr>
<td>Show Me How To Change Our Account Info and Formatting</td>
<td>Explains how to modify your CANSPAM address and settings like currency and timezone.</td>
</tr>
<tr>
<td></td>
<td><a href="https://app.bronto.com/mail/pref/address_index/?stStart=4o5h6pjg">https://app.bronto.com/mail/pref/address_index/?stStart=4o5h6pjg</a></td>
</tr>
<tr>
<td>Show Me How To Change Our SMS Support Info</td>
<td>Explains how to update the support information shown to your contacts via SMS. Must have SMS for this guide to work.</td>
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<tr>
<td></td>
<td><a href="https://app.bronto.com/mail/pref/sms_integration/?stStart=k5iz8qm6">https://app.bronto.com/mail/pref/sms_integration/?stStart=k5iz8qm6</a></td>
</tr>
<tr>
<td>Show Me Recommendations Web Identifiers</td>
<td>Explains how to set up Recommendations Web identifiers. Must have the Recommendations Web app for this guide to work.</td>
</tr>
<tr>
<td></td>
<td><a href="https://app.bronto.com/mail/apps/recommendationsPremium/?stStart=35o94vsn">https://app.bronto.com/mail/apps/recommendationsPremium/?stStart=35o94vsn</a></td>
</tr>
</tbody>
</table>
## Teach Me

A Teach Me is an interactive walkthroughs that help you complete work as you learn to use the platform and apps.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description and Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teach Me To Build A New Arrivals Recommendation</td>
<td>Walks you through the steps to create a new arrivals recommendation in Recommendations Standard or Recommendations Premium.</td>
</tr>
<tr>
<td>Teach Me To Build A Predictive Model Recommendation</td>
<td>Walks you through the steps to create a recommendation using a predictive model in Recommendations Premium.</td>
</tr>
<tr>
<td>Teach Me To Configure Product Imports</td>
<td>Walks you through the steps to configure product imports. After you has imported products manually the first time, products can be imported automatically. When completed, you will have configured products to import automatically from a delimited or XML file, hosted on an HTTP or FTP site.</td>
</tr>
<tr>
<td>Teach Me To Create A Segment</td>
<td>Has you build a basic segment with two rules. The first rule using a birthday contact field; the second rule uses RFM metrics. Explains AND/OR operators and shows how to flip them. When finished you will have a basic segment that can be used to send birthday marketing to contacts who have spent or ordered more than a certain amount.</td>
</tr>
<tr>
<td>Teach Me To Create An SMS Keyword</td>
<td>Walks you through the steps to create a new SMS keyword. Explains the difference between subscription and non-subscription keywords. When completed you should have a new SMS keyword.</td>
</tr>
<tr>
<td>Guide</td>
<td>Description and Link</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Teach Me To Send An A/B Split Message      | Walks you through the steps specific to setting up an A/B Split test. When you gets to the normal schedule a message page they are given an option of starting the Teach Me to Send A Message guide or to close the A/B Split test guide and complete the send a message steps on their own.  
https://app.bronto.com/mail/sms/keywords/?stStart=cyvshjqq |
| Teach Me To Send A Message                 | Walks you through the steps to send or schedule a message. Allows you to pick the message, enter their own information, and make their own choices about sending options. When finished the message should be scheduled to send.  
https://app.bronto.com/mail/message_browser/messages/?stStart=9dyxj1yo |
| Teach Me To Send A Test Message            | Walks you through the steps to send or schedule a test message. Explains why testing is important. Allows you to pick the message, enter their own information, and make their own choices about sending options. When finished the test message should be scheduled to send.  
https://app.bronto.com/mail/message_browser/messages/?stStart=d9qu98e4 |
| Teach Me To Set Default Sender Options     | Walks you through the steps to set the default sending options for their account.  
https://app.bronto.com/mail/sms/keywords/?stStart=qj3enpca |
| Teach Me Workflow Builder Basics           | Has you add a trigger, filter, and action node to the canvas and select a list and an email from two of the nodes. The user also learns how to connect nodes, change node labels, copy/paste nodes, and about throttling and activating the workflow. When finished you will have a basic workflow they should be able to use to build a more complex workflow.  
https://app.bronto.com/mail/workflow/create/?stStart=de70vfhb |
| Teach Me To Create Users                   | Helps you create a new account user. You must have the correct permissions in order to be able to create users and use this guide.  
https://app.bronto.com/mail/permission/list_users/?stStart=dcn6bhti |
| Teach Me To Configure Usage Alerts         | Walks you through how to set up additional usage alerts so you can monitor your account allocation usage.  
https://app.bronto.com/mail/pref/usage_alerts/?stStart=5vka1rh3 |
| Teach Me To Update My User Info            | Has you update your own personal user information. This update will not affect any other user accounts.  
https://app.bronto.com/mail/pref/personal_index/?stStart=x6e1z5su |
| Teach Me To Secure My Account              | Walks you through restricting your account based on IP address and setting up password, login, and session security options. You can skip the IP restriction section of this guide if you do not with to use IP-based security.  
https://app.bronto.com/shared/settings/network_access/?stStart=7akz4j44 |
| Teach Me To Configure Default Email Options| Helps you understand and configure all of the options on the General Settings page, many of which are related to default sending options.  
https://app.bronto.com/mail/pref/general_index/?stStart=vypki81c |
| Teach Me To Import Orders Using Data Loader| Walks your through using Data Loader to import order data from an FTP server.  
https://app.bronto.com/mail/apps/dataloader/?stStart=aijveh0i |
**Guide Me On Products**

Importing and maintaining a product catalog in Bronto allows you to take your email marketing strategy to the next level.

When your product data is in Bronto, it can be used to dynamically insert products into messages. This means that you won't need to remember to update an image, or a sales price, or any product data in your messages when these things change. As long as you keep your Bronto product catalog up-to-date, Bronto can insert the current data for a product field at the time a message is sent.

First, select whether you plan to import a delimited or XML file and clean up your file for import. Then configure Bronto's product import settings, import your product data into Bronto, and verify your import was successful. Finally, learn how to use product tags in your messages.

### Prepare Delimited Product Data File for Import

**Important:** Skip this section if you are importing an XML product data feed file.

A delimited file is a document that contains rows of data where each data element is separated by a delimiter and each line represents a new item. You can use tabs, pipes, commas, colons, semi-colons or tildes as the delimiter in your

<table>
<thead>
<tr>
<th><strong>Guide</strong></th>
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<tbody>
<tr>
<td>Teach Me To Configure Order Data Imports From Shopify</td>
<td>Walks you through how to configure the order data you imported from Shopify. <a href="https://app.bronto.com/mail/apps/dataloader/?stStart=98y0qyoh">https://app.bronto.com/mail/apps/dataloader/?stStart=98y0qyoh</a></td>
</tr>
<tr>
<td>Teach Me To Configure Pop-up Manager To Use Shopify</td>
<td>Walks you through how to set up Pop-Up Manager to use with Shopify. <a href="https://app.bronto.com/mail/apps/dataloader/?stStart=1pmmzvbk">https://app.bronto.com/mail/apps/dataloader/?stStart=1pmmzvbk</a></td>
</tr>
<tr>
<td>Teach Me To Configure Coupon Manager To Use Shopify</td>
<td>Walks you through how to set up Coupon Manager to work with Shopify. <a href="https://app.bronto.com/mail/apps/dataloader/?stStart=awvpaic5">https://app.bronto.com/mail/apps/dataloader/?stStart=awvpaic5</a></td>
</tr>
<tr>
<td>Teach Me To Configure Contact Data Imports from Shopify</td>
<td>Walks you through how to configure the contact data you imported from Shopify. <a href="https://app.bronto.com/mail/apps/dataloader/?stStart=s6tx7q2h">https://app.bronto.com/mail/apps/dataloader/?stStart=s6tx7q2h</a></td>
</tr>
<tr>
<td>Teach Me To Configure Cart Recovery To Use Shopify</td>
<td>Walks you through how to set up Cart Recovery to use with Shopify. <a href="https://app.bronto.com/mail/apps/dataloader/?stStart=czefx22f">https://app.bronto.com/mail/apps/dataloader/?stStart=czefx22f</a></td>
</tr>
<tr>
<td>Teach Me To Map A Shopify Order Property To A Contact Field</td>
<td>Walks you through how to map a Shopify order property to a contact field in Bronto. <a href="https://app.bronto.com/mail/apps/dataloader/?stStart=bdmqlct0">https://app.bronto.com/mail/apps/dataloader/?stStart=bdmqlct0</a></td>
</tr>
<tr>
<td>Teach Me To Configure Shopify Product Imports</td>
<td>Walks you through how to configure the products you have imported from Shopify. <a href="https://app.bronto.com/mail/apps/dataloader/?stStart=f9haqhqo">https://app.bronto.com/mail/apps/dataloader/?stStart=f9haqhqo</a></td>
</tr>
<tr>
<td>Teach Me to Configure Opt-ins in Shopify</td>
<td><a href="https://app.bronto.com/mail/index/dashboard/?stStart=rl9bpjyf">https://app.bronto.com/mail/index/dashboard/?stStart=rl9bpjyf</a></td>
</tr>
</tbody>
</table>
delimited file. You must consistently use the same delimiter in the file. Whatever delimiter you use cannot be used within a field, unless the contents of the field is within quotation marks. For example, if you use a comma as your delimiter, you cannot use a comma to offset items in an attribute list unless the list is in quotation marks.

This two-minute video covers the common requirements for setting up your delimited file to import properly.

https://www.youtube.com/embed/5WSIRUmiD5Q

There is no limit to the number of attributes a product data feed may have, but only attributes that have been mapped to a Bronto field are imported. At a minimum, each product must have a **Product ID** and a **Title**. Each mapped attribute must validate against the rules for the Bronto field it is mapped to or it will not import successfully. For more information about field format and validation rules see *Product Field Descriptions* on page 1130.

### Prepare XML Product Data File for Import

**Important:** Skip this section if you are importing a delimited product data feed file.

This two-minute video covers the common requirements for setting up your XML file to import properly.

https://www.youtube.com/embed/IDKwUxS4lh0

There is no limit to the number of attributes a product data feed may have, but only attributes that have been mapped to a Bronto field are imported. At a minimum, each product must have a **Product ID** and a **Title**. Each mapped attribute must validate against the rules for the Bronto field it is mapped to or it will not import successfully. For more information about field format and validation rules see *Product Field Descriptions* on page 1130.

### Configure Bronto to Properly Manage the Import

Before you can import product data feeds, you need to configure your feed settings on the *Configure Import Feed* page so Bronto knows how to properly handle your data feed file. Whether you are importing an XML or a delimited file, this guide will help you configure your import. This guide also helps you set up automatic daily imports, which we highly recommend.

Teach Me To Configure My Product Import Settings

Next you need to map the product fields in your file to product fields in Bronto. This video explains how to map fields, as well as how to create custom fields.

https://www.youtube.com/embed/ftFAvOc3u8Y

Need more information? See *Product Field Descriptions* on page 1130 for information about the default product fields that Bronto provides or *Product Field Data Types* on page 1135 for information about the data types you can use when setting up a custom field.

### Import Your Product Catalog For The First Time

Bronto requires you to run a manual import the first time a product data feed is imported. This provides the opportunity to clean up any issues with your data feed file before imports are run automatically.
Tell Me How To Manually Import Product Data

Verify Your Import

After your import completes, check to make sure all of your product data was imported properly. This quick guide shows you how to verify your product data in Bronto.

Show Me How to See My Products

If your data wasn't imported successfully, you can use the Product Import Transaction Log to see what went wrong. Some common things to check for:

- Are your fields mapped properly?
- Are your delimiters or XML tags being used correctly?
- Do you have any special characters in your product data that is breaking the import?
- Did you forget to use quoted fields or indicate that you use quoted fields?

Use Product Tags To Include Products In Messages

Once your product catalog is in Bronto, you can use product tags to pull your imported product data into messages. This video shows how to include product data in messages designed using the email message editor.

https://www.youtube.com/embed/OevVZjqkUeY

If you don't use the email message editor, this topic explains how to manually add product tags to a message.

Guide Me On Order Service

Order Service is the back-end service Bronto uses to automatically pass order data from your site into your Bronto account. Some Order Service implementations can also be used to pass cart data. If you want to leverage our newest, and upcoming, offerings your account needs to have Order Service.

There are different paths you can take to implementation Order Service.

Learn Your Current Bronto Order Settings

Before you decide which path to take, you need to know if Order Service is available in your account. Some older accounts that previously used Legacy Conversion Tracking may not have Order Service available to them without assistance from customer support.
Show Me my current orders configuration.

If your account:
  • Uses a connector, go to the next section.
  • Has Order Service but you do not use a connector, skip the next section.
  • Does not have Order Service, skip to the Legacy Conversion Tracking section.

**I Use Shopify, NetSuite, Magento, or Demandware**

If you use one of these partners, you can use a Bronto connector to pass order data using Order Service.

Guide me on how to set up order imports using Shopify. Guide me on how to set up order imports using other connectors.

**I HAVE Order Service But Do NOT Use a Listed Partner**

If you do not use a partner, you can implement Order Service using either a JSON object or JavaScript snippet implementation. The primary difference between the two implementations is the JavaScript snippet cannot collect and pass cart data.

Do you need to collect and pass cart data to Bronto?


**I Use Legacy Conversion Tracking**

If you use Legacy Conversion Tracking you will need to work with Bronto to migrate your existing data to Order Service.

Guide Me on migrating to Order Service.
Guide Me On Order Service Using A JSON Object Implementation

Order Service is the method Bronto uses to automatically import order data (and sometimes cart data) from your site into your Bronto account. If you want to leverage our newest, and upcoming, offerings you will need to implement Order Service.

Construct A JSON Object

The JSON object you construct is essentially a database value mapping exercise. You need to:

1. Copy Bronto's example JSON object into a code editor.
2. Delete any order fields you don't want to pass to Bronto from the example.
3. Search the code that's used to build your site for the code that's used to store each order field you want to pass.
4. Replace the placeholder value with the order field code from your site.

For example, replace 35.98 in "grandTotal": 35.98, with the code that's used to store order IDs on your site. This would look similar to "grandTotal": order.endtotal,.

Some things to keep in mind as you construct your object:

- The JSON Object can contain a “cartPhase” element representing current stage of checkout. Phases include: CUSTOMER_LOGIN, BILLING, SHIPPING_INFO, SHIPPING_METHOD, PAYMENT, ORDER_REVIEW, ORDER_COMPLETE. The ORDER_COMPLETE cart phase is required.
- If mapped, taxAmount should have either 2 or 4 decimals places.
- grandTotal and orderId are required for ORDER_COMPLETE.
- Only provide emailAddress if you providing a corresponding value or data can be incorrectly attributed to contacts.
- Make sure you pass the full URL for imageUrl.

Add JSON Object and Bronto Tag Manager Code To Your Site

Now you need to add the JSON Object you just constructed and Bronto's Tag Manager code to your site.

Show Me my Tag Manager code.

The Tag Manager code should be added to each page on your site and the JSON Object needs to appear on every page you have a cart. The JSON object should load before the embed code. We recommend adding both to the footer for your site.

Configure Bronto Commerce Settings

Once the JSON object and embed code are added to your site, you can configure Bronto to collect cart and order data.

Tell me how to set up my Order Settings.
Tell me how to capture cart phases.

Tell Me how to map cart selectors.

Tell Me how to capture email addresses.

**Set Up Data Loader Order or REST API Imports**

We recommend using either Bronto's API or Data Loader as a backup method of importing order data. JavaScript has browser and configuration dependencies so we cannot guarantee the import of all order data when it is sent using the JSON object implementation method. Typically, this implementation will capture more than 90% of your traffic and configuring Data Loader or REST API imports helps ensure the other 10% will also be captured.

If you do not want to use Bronto's API, configure Data Loader to import order data.

**Teach Me to Configure Data Loader to Import Order Data.**

**Verify Your Order Data Is Being Imported Properly**

The *Tables > Orders* page can be used to check if your order data is being imported properly using Order Service. Use this 4-step guide to check that your Order Service implementation is properly configured.

**Show Me that my order data is being imported successfully.**

We also recommend exporting your order data from both Bronto and your commerce platform and running a comparison.
Guide Me On Order Service Using A JavaScript Snippet Implementation

Order Service is the method Bronto uses to automatically import order data (and sometimes cart data) from your site into your Bronto account. If you want to leverage our newest, and upcoming, offerings you will need to implement Order Service.

Construct A JavaScript Snippet

When you implement Order Service using the JavaScript snippet implementation, you will need to do the following to build the JavaScript Snippet:

1. Copy the Order Capture script from the Home > Settings > Commerce page and paste it into a code editor.
2. Delete any order fields you don't want to pass to Bronto from the example.
3. Search the code that's used to build your site for the code that's used to store each order field you want to pass.
4. Replace the placeholder value with the order field code from your site.

   For example, replace 35.98 in "grandTotal": 35.98, with the code that's used to store order IDs on your site. This would look similar to "grandTotal": order.endtotal,.

Add JavaScript Snippet and Bronto Tag Manager Code To Your Site

Now you need to add the JavaScript snippet you just constructed and Bronto's Tag Manager code to your site.

Configure Bronto Commerce Settings

Once the JavaScript snippet and tag manager code are added to your site, you can configure Bronto to collect order data.

Tell me how to set up my Order Settings.

We also recommend exporting your order data from both Bronto and your commerce platform and running a comparison. Roughly 90% of the data from your site should be represented in your Bronto export file. If the data does not match, check the formatting of the JavaScript snippet.
Set Up Data Loader Order or REST API Imports

We recommend using either Bronto's API or Data Loader as a backup method of importing order data. JavaScript has browser and configuration dependencies so we cannot guarantee the import of all order data when it is sent using the JavaScript snippet implementation method. Typically, this implementation will capture more than 90% of your traffic and configuring Data Loader or REST API imports helps ensure the other 10% will also be captured.

If you do not want to use Bronto's API, configure Data Loader to import order data.

Verify Your Order Data Is Being Imported Properly

The [Tables > Orders](#) page can be used to check if your order data is being imported properly using Order Service. Use this 4-step guide to check that your Order Service implementation is properly configured.

Guide Me On Order Service Using NetSuite, Magento, or Demandware

If you use NetSuite, Magento, or Demandware, you can use one of Bronto's connectors as part of your Order Service implementation.

Prerequisites

Before you get started the following must be true:

1. Your connector integration is configured.
   
   If you do not have a working connector, we recommend working with Bronto Professional Services to set up your integration.

2. Order Service is turned on in your account.
   
   Order Service is a configuration that tells Bronto how to store order data. If Order Service is not on in your account, contact your account manager so that Bronto can facilitate migrating your account to Order Service.

Configure Your Connector To Import Order Data

Once Order Service is available and your connector is installed, you can use the settings in Bronto to configure your connector to import order data from your site and start leveraging Order Service.

**Tell me how to configure NetSuite Connector to import order data.**

**Tell me how to configure Demandware Connector to import order data.**
Tell me how to configure Magento Extension to import order data.

Skip this if you already use Data Loader to import order data.

Tell me how to configure Magento Connector to import order data.

Teach Me to Configure Data Loader to Import Order Data.

Verify Your Order Data Is Being Imported Properly

Show Me that my order data is being imported successfully.

Guide Me On Order Service Using Shopify

If you use Shopify, you can use our connector as part of your Order Service implementation.

Complete the following to use Shopify to manage order data with Order Service:

Skip this if Shopify is already configured.

Tell me how to configure Shopify Connector.

Skip this if Shopify order import is already configured.

Tell me how to configure Shopify to import order data.

Verify Your Order Data Is Being Imported Properly

The Tables > Orders page can be used to check if your order data is being imported properly using Order Service. Use this 4-step guide to check that your Order Service implementation is properly configured.
Guide Me On Migrating To Order Service

Order Service is the method Bronto uses to automatically import order data (and sometimes cart data) from your site into your Bronto account. If you want to leverage our newest, and upcoming, offerings you will need to implement Order Service. When your account uses Legacy Conversion Tracking, it does not use Order Service and will need to be migrated.

You will complete some parts of orders migration yourself and some data migration steps will be performed by customer support.

JavaScript Snippet or JSON Object Implementation

You have two migration options:

1. Use a JSON object implementation. If you use JSON objects on your site, we highly recommend this type of Order Service implementation as it also supports collecting cart data which will allow you to implement Cart Recovery.
2. Use a JavaScript snippet implementation. This process involves building a JavaScript snippet and adding it to the code on your site in order to allow Bronto to collect order data. While easier, this type of implementation cannot support collecting cart data.

Once you’re sure order data is being collected, Bronto support will work with you to migrate your old order data to order service.

Add Bronto Tag Manager Code To Your Site

The Bronto embed code you currently have on your site will not work with Order Service. To migrate, locate your existing embed code in your site code and add the new Tag Manager code below it. You do not want to remove the old embed code until after Order Service is set up or some order data may be lost.

Configure A JavaScript Snippet Implementation

Attention: Do not complete this section if you are using a JSON object implementation.

If you do not need to capture cart data, you can use the JavaScript Snippet implementation. If you do need to capture cart data, or may want to in the future, skip to the JSON object implementation section.

The first step is to build a JavaScript snippet that maps your site's order code to Bronto order fields so that Bronto can properly recognize, capture, and store order data from your site. We've provided a JavaScript snippet code example on the Home > Settings > Commerce page.
Show Me the Order Capture script.

You will need to do the following to build the JavaScript Snippet:

1. Copy the Order Capture script and paste it into a code editor.
2. Delete any order fields you don't want to pass to Bronto from the example.
3. Search the code that's used to build your site for the code that's used to store each order field you want to pass.
4. Replace the placeholder value with the order field code from your site.

For example, replace 35.98 in "grandTotal": 35.98, with the code that's used to store order IDs on your site. This would look similar to "grandTotal": order.endtotal,

After you build your JavaScript snippet, add it to your site. The snippet should be added to the code that generates each page on your site that contains order data.

Finally, you will need to configure your Order Settings located on the Home > Settings > Commerce page.

Tell me how to set up my Order Settings.

Configure A JSON Object Implementation

**Attention:** Do not complete this section if you are using a JavaScript snippet implementation.

Once the Tag Manager code is added to your site, you can configure Bronto to collect cart and order data. The first step is to build a JSON object and add it to your site code.

The JSON object you construct is essentially a database value mapping exercise. You need to:

1. Copy Bronto's example JSON object into a code editor.
2. Delete any order fields you don't want to pass to Bronto from the example.
3. Search the code that's used to build your site for the code that's used to store each order field you want to pass.
4. Replace the placeholder value with the order field code from your site.

For example, replace 35.98 in "grandTotal": 35.98, with the code that's used to store order IDs on your site. This would look similar to "grandTotal": order.endtotal,

Some things to keep in mind as you construct your object:

- The JSON Object can contain a "cartPhase" element representing current stage of checkout. Phases include: CUSTOMER_LOGIN, BILLING, SHIPPING_INFO, SHIPPING_METHOD, PAYMENT, ORDER_REVIEW, ORDER_COMPLETE. The ORDER_COMPLETE cart phase is required.
- If mapped, taxAmount should have either 2 or 4 decimals places.
- grandTotal and orderId are required for ORDER_COMPLETE.
- Only provide emailAddress if you providing a corresponding value or data can be incorrectly attributed to contacts.
- Make sure you pass the full URL for imageUrl.

Next, add your JSON object to your site's code. The JSON object needs to appear on every page that collects order and cart data.
Finally, you need to configure settings located on the **Home > Settings > Commerce** page so Bronto knows how to manage your order and cart data as it's imported.

Tell me how to set up my Order Settings.

Tell me how to capture cart phases.

Tell Me how to map cart selectors.

Tell Me how to capture email addresses.

**Set Up Data Loader Order or REST API Imports**

We recommend using either Bronto's API or Data Loader as a backup method of importing order data. JavaScript has browser and configuration dependencies so we cannot guarantee the import of all order data when it is sent using either the JSON or JavaScript implementation methods.

Typically, these implementations will capture more than 90% of your traffic and configuring Data Loader or REST API imports helps ensure the other 10% will also be captured.

⚠️ **Important:** If you currently use Bronto's SOAP API to import order data, update your API process to use Bronto's REST API.

If you do not want to use Bronto's API, configure Data Loader to import order data.

Teach Me to Configure Data Loader to Import Order Data.
Verify Your Order Data Is Being Imported Properly

The Tables > Orders page can be used to check if your order data is being imported properly using Order Service. Use this 4-step guide to check that your Order Service implementation is properly configured before contacting support to migrate your order data.

Show Me that my order data is being imported successfully.

We also recommend exporting your order data from both Bronto and your commerce platform and running a comparison.

Work With Bronto Support To Migrate Your Legacy Order Data

When you're sure order data is being collected properly, contact customer support to request an order data migration. Let them know:

- You have already set up Order Service.
- The type of implementation you used.
- That you placed an order and verified it is showing up correctly.
- You are ready to migrate your data from Legacy Conversion Tracking to Order Service.

Guide Me On Recommendations

Recommendations help ensure that the messages you send your contacts are targeted and relevant.

A recommendation is a list of items from your product catalog that meet a set of criteria that you define as you build a recommendation. When you use a recommendation in a message, what products best match its criteria are determined at the time a message is sent. Recommendations can be used to build highly-targeted email messages and campaigns that contain products relevant to your contacts.

Before you use can use recommendations, you will need to have a product catalog in Bronto. Check out the Guide Me on Products if you do not have a product catalog in Bronto.

If you want to use Predictive Models in Recommendations Premium, you will also need to configure your Bronto account to use Order Service to collect order data from your website. Order Service is the method Bronto uses to automatically import order data (and sometimes cart data) from your site into your Bronto account. Check out the Guide Me on Order Service to learn more.

Create a Recommendation

After you have imported a product catalog, you can start building recommendations. This guide will teach you how to build a New Arrivals recommendation so that your recommendation will only show newly added products to your catalog. After you learn how to make a New Arrivals recommendation, you can use these steps to build many different kinds of recommendations to meet your needs.

Teach Me To Build A New Arrivals Recommendation
Create A Recommendation Using A Predictive Model

Important: Skip this section if you do not have Recommendations Premium.

If you have Recommendations Premium, you can build a recommendation that uses a predictive model. Bronto's predictive models use patterns of behavior related to a reference product in order to provide recommendation results. This guide will teach you how to build a recommendation that uses a predictive model. However, you can create recommendations in Premium that do not use predictive models as well.

Teach Me To Build A Predictive Model Recommendation

Add A Recommendation to Your Message

After you create your recommendations, you need to add them to your messages. This video shows you how to add a recommendation to your message using the Email Message Editor.

https://www.youtube.com/embed/MlBh1sickk0

Test Your Recommendation Message by Sending A Test Message

To make sure the message you created uses the recommendation correctly, it is important to send a test message. This guide will teach you how to send a test message for your recommendation.

Teach Me To Send A Test Message

Bronto Navigation

The Bronto platform has navigation tools that you can use to quickly move between areas of the platform. These tools can always be accessed at the top of the page, no matter where in the platform you are.

Bronto platform navigation is divided into the following functional areas:

Platform Banner

The platform banner contains many useful links. The Help link opens the online help page most closely related to the platform page you are on. Account Info provides an at-a-glance look at your resource usage and your user and subscription information. What's New is our weekly platform release notes. Both Live Chat and Support provide ways to contact Bronto support professionals.
Platform alerts can also be accessed from the banner. When alerts appear in the application, you will notice an icon like the red icon in the screenshot above. As more alerts appear, the number on the alert icon increases. To remove an alert from the alert drop-down, click **Dismiss**.

**Home**

The **Home** menu is where you go to manage your user and application configuration and settings. This menu is where you can access the main dashboard for your account, set up your e-commerce and web analytic connections, view the currently and recently run activities in your account, and configure all of your account settings - including your personal information, account security and network access, order service settings, and data connection and exchange settings.

**Tables**

The **Tables** menu is where you work with your contact, product, and order data. For contacts, this is where you can add contact fields to your account, use the platform to import contacts, create lists and segments that you can use to organize and group your contacts for more targeted marketing campaigns, and view special contact-related reports. For products, you can configure product import settings, import your products, view information about your product imports, and search for and view the products in your catalog. You can only search and view your order data from the **Tables** menu. If you want to import order data, you will need to use Data Loader or configure your Commerce settings on the **Home > Settings > Commerce** page.

**Messages**

The **Messages** menu is where you can manage the creation and sending of messages. Messages include emails, Tweets, Facebook posts, and SMS messages if you have purchased SMS. All of these types of messages can be created by going to **Messages > Messages**. To view, edit, or schedule message deliveries, or access message statistics simply click on the name of the message in the All Messages table on the **Messages > Messages** page. If you want to automate your message sending, you should use the **Automation > Workflows** option. The **Deliveries** page can be used to view statistics and reports related to a message delivery. On the **Delivery Groups** page you can combine messages and/or deliveries into delivery groups in order to see more complex patterns of contact behavior. Finally, on the **Email Replies** page, you can view all of the email replies that you have received.

**Content**

The **Content** menu is where you manage the assets you use in your messages. Use **Hosting** to upload and store files, **Headers and Footers** to create the headers and footers you'll use in your messages, **Content Tags** to create reusable "blocks" of content that you can use in your messages, **Feeds** to create and manage RSS feeds, and **QR Codes** to encode a URL into an image that you can add to email messages.

Finally, the **Content** menu is where you can create and manage **webforms**. A webform is an online form that can be used to interact with and gather information from contacts. Bronto provides several default types of webforms that you can customize. After you've created your webform you can add it to your messages as you build and edit them.

**Automation**

The **Automation** menu is where you can set up Bronto to automatically manage your marketing campaigns. **Workflows** is the primary tool you want to use to do this. With workflows, you can create multi-step, cross-channel campaigns using a drag-and-drop interface. For example, you can use workflows to engage new contacts in a welcome series in order to make a great first impression and set the tone for their relationship with your brand. Or you can set up a workflow campaign that will engage contacts after a purchase is made and intelligently encourage future purchases. In addition to workflows, **Automated Message Rules** can be used to automatically manage email campaigns with criteria you define by sending email on an on-going, or case-by-case basis. **Automated Message Rules** are our legacy automation technology that came before the more sophisticated workflows.
**Reports**

The **Reports** menu is where you can view, compare, and download reports. **Reports > Legacy Reports** allows you to quickly get an overview of the activity going on in your account and you can also access more detailed reports — everything from performance metrics to contact growth numbers. **Comparison Report** allow you to add multiple items to a single report in order to compare their metrics. **Report Downloads** allow you to export contact and tracking data to .csv files. The **Reports** menu isn't the only location in the app you can access reports. Reports for specific items, such as a message, a delivery, or a workflow, can be accessed by clicking the report icon found in the last column of an overview table row.

**Apps**

The **Apps** menu is how you access any apps you have purchased, whether they are Bronto apps or third-party. Up to 9 apps will appear in the apps list. If you have more than 9 apps, you can access any apps that do not appear in the list from the Apps Dashboard. For more information about purchasing apps, visit [https://appcenter.bronto.com](https://appcenter.bronto.com).

**Quick Links**

The **Quick Links** menu allows you to easily add a link to certain pages in the application that you can click at any time from any page. If you do not see **Add this page** when you open the **Quick Links** menu then the page you are on cannot be bookmarked.

**Search Table Content**

You can use the search box that accompanies tables to search the contents of that table.

To use the table search, type in a search term and click **Search**.

![Search Table Content](image)

**Change The Number Of Rows Displayed In A Table**

You can increase or decrease the number of rows displayed in a table.

You can use the **Show rows** pull-down menu to change the number of rows shown in the table.

**Hide or Show Columns In A Table**

You can hide table columns in order to only display the metrics you need.

All of the available columns on a table are shown by default.

⚠️ **Warning:** Due to limitations with WebKit, hiding/showing columns is not available in Safari, Mobile Safari, or Google Chrome.

To hide/show the columns in a table

1. Click the **Choose Visible Columns** icon.
2. Click the checkbox corresponding to the column you want to hide/show.
3. Click **Save Changes**.
Resize Table Columns

You can resize table columns.

You can resize table columns by moving your mouse over the edge of the header of the column you want to resize, and then dragging it to the size of your choosing. The columns will remain at this size until you choose to reset them to their default sizes.

Table Column Before Resize

Table Column After Resize

Restore Default Table Column Widths

You can restore table columns to their default width after you have resized them.

To restore table column widths to their default size:

1. Click the Choose Visible Columns icon.
2. Click Reset Column Sizes.
3. Click Done.