

Agenda



- Introduction
- Sitecore Send a quick glance
- Integrating with XM & Rendering Host
- Sample automation flows (standard & custom)
- Q&A

Introduction



At some point, add proper content too!



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A bit of history



- Mailinglist (ISV)
- Newsletter
- ECM
- EXM
- Sitecore Send (Moosend)
- OMS
- DMS
- xDB
- XP
- Sitecore Send (Moosend)





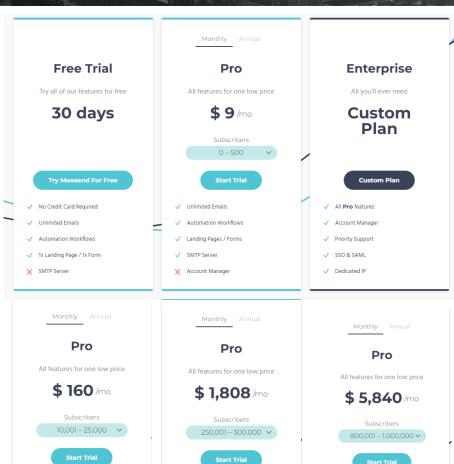




Sitecore Send







✓ Unlimited Emails

✓ SMTP Server

X Account Manager

✓ Automation Workflows

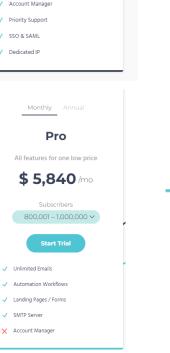
✓ Landing Pages / Forms

✓ Unlimited Emails

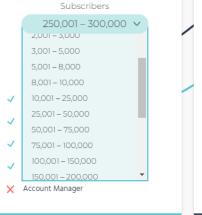
✓ SMTP Server

Account Manager

Automation Workflows



✓ SMTP Server

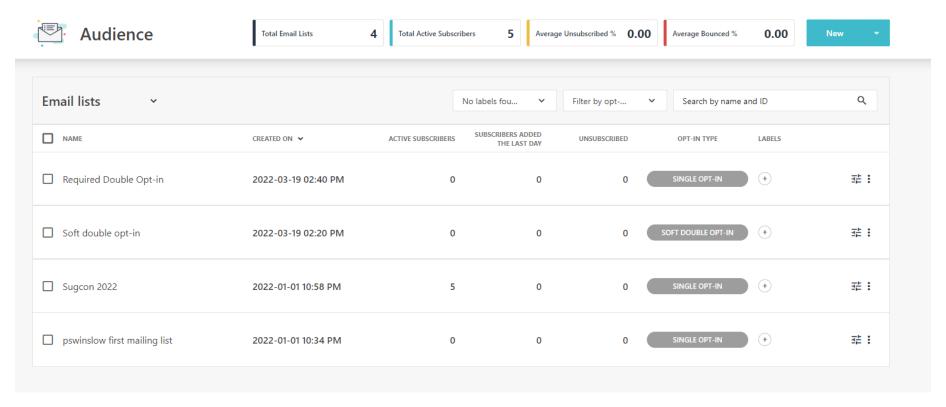




Lists



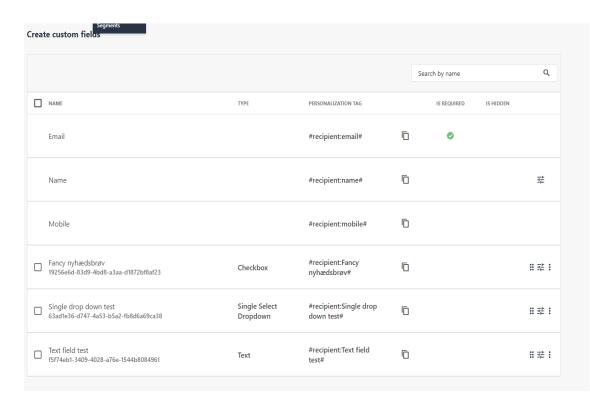
- Single opt-in
- Soft double opt-in
- Strong double opt-in

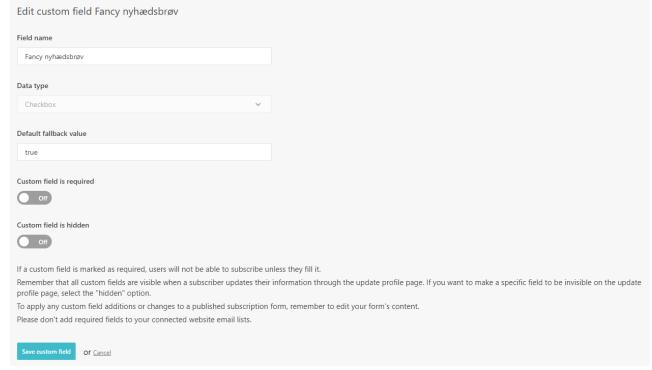


Custom fields



- For personalization tags
- For segmentation
- For conditions in automations





Segments



Details				Prev	view members Select meml					
Segment name										
Member email ends with x										
Fetch										
All	✓ of mem	bers that match All		of the following criteria.						
Rules										
Member Email	~	ends with	· (dk ⊗	×					
		AND -								
Member Mobile	~	is not	· (12345678 💿	×					
		AND								
Select a criteria	~	Select a comparer	~		×					
					~					
Add rule Soft d					in edit list name 8a7415e1a818					Create segment
				Your dashboard						
				View all members				No labels fou 💙	Search by name and ID	Q
				Perform bulk actions	NAME		CREATED ON ▼	SEGMENT ID	LABELS	
				Set your settings	Member email ends Member Email ends with	with x	2022-03-19 02:28 P	M 116484	(+)	幸:
				Create custom fields						
				Segments	Double opt-in verifie Verified for Double Opt-I	ed members n	2022-03-19 02:27 P	VI 116483	+	非 :

Campaigns



Create new campaign

What's it gonna be today?



Regular

Create an email to share your news, promotions, or announcements with your subscribers.

Create



A/B testing

Split your email list into two separate lists and test different versions of your email to see what works best for your subscribers.

Create



Repeatable

Quickly set up digests and newsletters that get their updated content from a URL and are automatically sent whenever you want.

Create





RSS

Automatically email your latest posts and articles to your subscribers, with content updated from an RSS feed URL.

Create

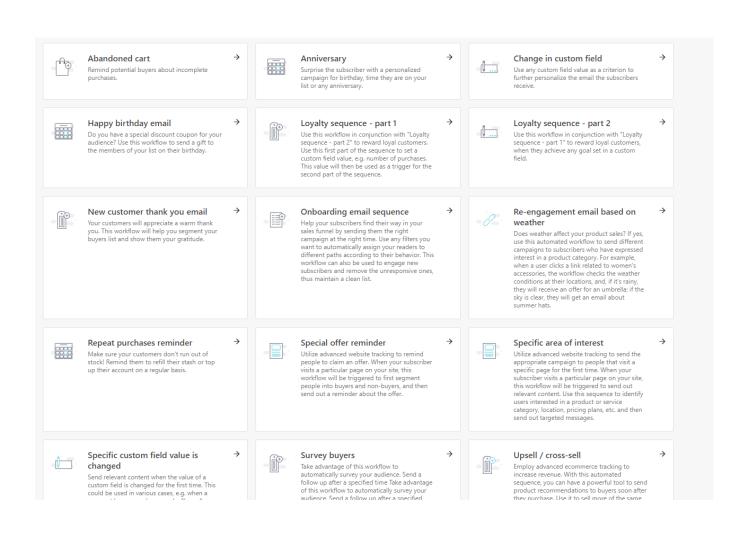


Automations



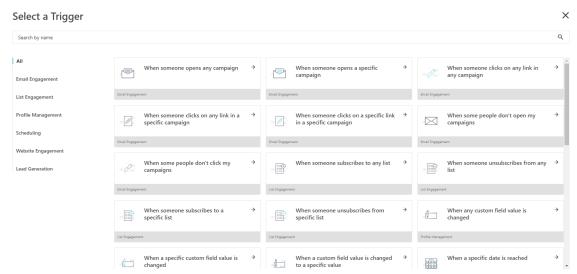
- Very easy & intuitive
- A wide selection of standard flows, which can be customized

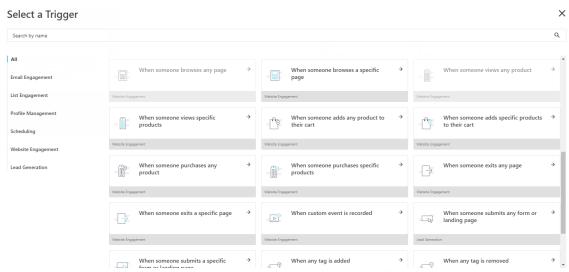
Create and save your own



Automations - Triggers





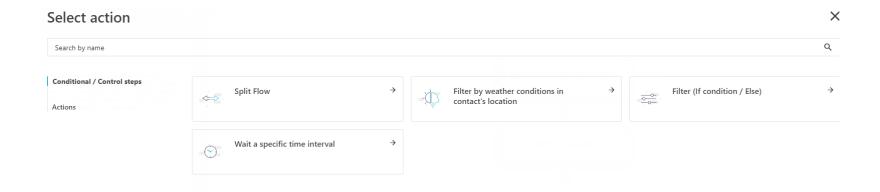


Automations - Conditions/Controls



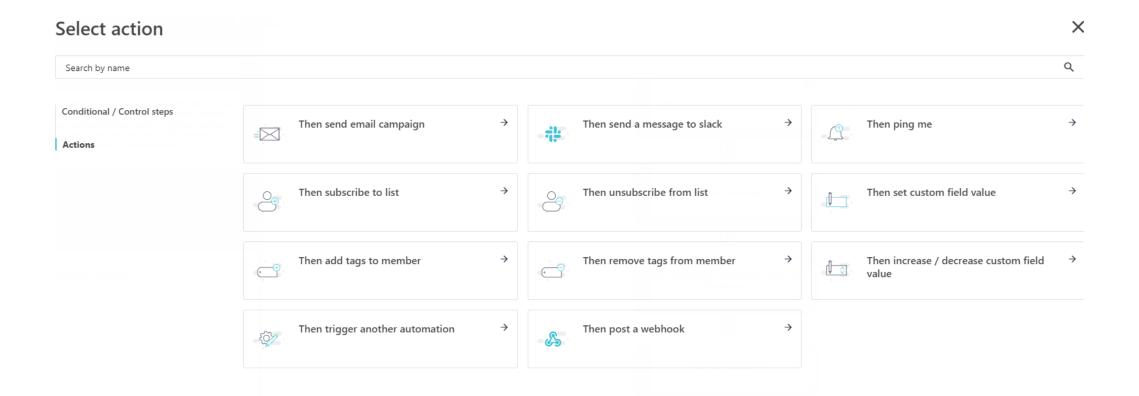
Custom fields

- Time
 - § Months
 - § Days
 - § Hours
 - § Minutes



Automations - Actions

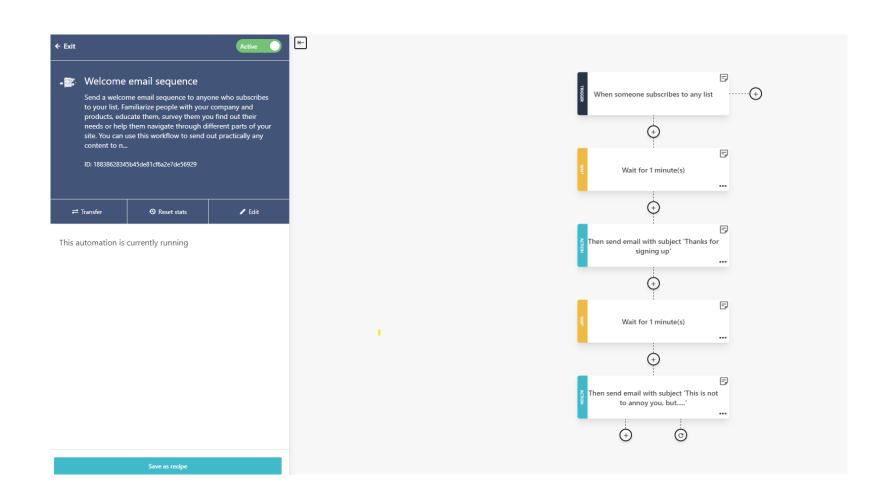




Welcome email



- Recipe
- Title / Description
- Triggers
- Conditions/Controls
- Actions





Website, SPF and Tracking



- Websites are added in order for Moosend to be able to track events
- Default tracking script with Site ID.
- Placed in <Head> section
- Tracking is for triggers in automations
- Custom events needs to be registered once in order for them to be used in automations
- SPF record information provided, ensure to register this so that emails are not by default categorized as junk.

- Different tracking options
 - § mootrack('identify', <email>, [<name>])
 - § mootrack('trackPageView')
 - § mootrack('<custom event>')
 - § mootrack('<custom event>', <object>)
 - § mootrack('trackAddToOrder', itemCode, itemPrice, itemUrl ,itemQuantity [, ...])
 - § mootrack('trackOrderCompleted', products)

Domains - be aware ©



<u>OK</u>

- http://cm-sugcon-send-51-138-106-154.nip.io/
- http://www.mydomain.com
- https://cd-sugcon-sendmain.devtest.sh

- Not OK
- http://www-sugcon-send-51-138-106-154.nip.io/
- http://www2-sugcon-send-51-138-106-154.nip.io/
- http://www-sugcon-send-51-138-106-154.nip.io/
- https://cd-sugcon-sendmain.aksdc1.devtest.sh/

Service



```
3 references | Jesper Balle, 4 days ago | 1 author, 1 change
public async Task<ICollection<MooSendCustomField>> GetListCustomFields(string listId)
    var response = await _client.GetAsync($"https://api.moosend.com/v3/lists/{listId}/details.json?apikey={_apiKey}");
    var model = await Read<MooSendResponse<MooSendListDetails>>(response);
    return model?.Context?.CustomFieldsDefinition;
2 references | Jesper Balle, 4 days ago | 1 author, 1 change
public async Task Subscribe(string listId, MooSendSubscriberUpdate subscriber)
    var json = JsonConvert.SerializeObject(subscriber);
    var content = new StringContent(json);
    content.Headers.ContentType = new System.Net.Http.Headers.MediaTypeHeaderValue("application/json");
    var response = await _client.PostAsync($"https://api.moosend.com/v3/subscribers/{listId}/subscribe.json?apikey={_apiKey}",
    var model = await Read<MooSendResponse<MooSendSubscriber>>(response);
    if(model.Error != null)
        throw new Exception(model.Error);
2 references | Peter Sebastian Winslow, Less than 5 minutes ago | 2 authors, 2 changes
public async Task<T> Read<T>(HttpResponseMessage response)
    var content = response?.Content != null ? await response.Content.ReadAsStringAsync() : null;
    if (!response.IsSuccessStatusCode || content == null)
        throw new Exception("Error: " + content);
    return JsonConvert.DeserializeObject<T>(content); ;
```

Listprovider



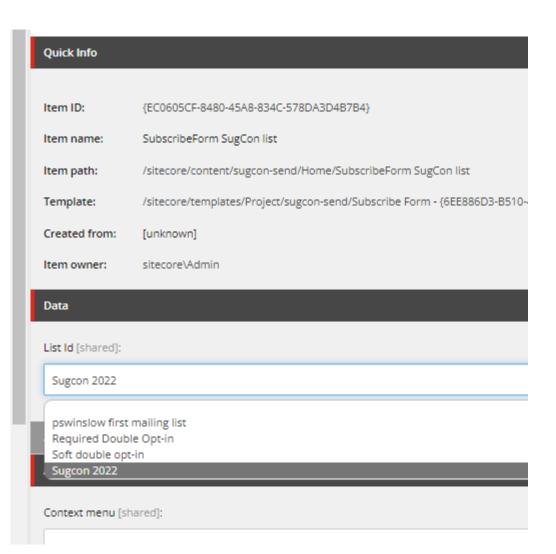
Choose the list in Sitecore

```
private Dictionary<Guid, MooSendList> GetModels()
{
    var key = "sitecoresend-lists";
    if (_cache.Value.GetValue(key) is Dictionary<Guid, MooSendList> result1) return result1;

    lock (this)
    {
        if (_cache.Value.GetValue(key) is Dictionary<Guid, MooSendList> result) return result;

        Sitecore.Diagnostics.Log.Info("Provider request to MooSend starting", this);
        try
        {
            var lists = _service.GetLists().ConfigureAwait(true).GetAwaiter().GetResult();
            result = lists.ToDictionary(x => Guid.Parse(x.ID), x => x);
        }
        catch (Exception exc)
        {
                Sitecore.Diagnostics.Log.Fatal("Could not fetch lists: " + exc.Message, exc, this);
            result = new Dictionary<Guid, MooSendList>(0);
        }
        Sitecore.Diagnostics.Log.Info("Provider request to MooSend done" this);
        result = new Dictionary<Guid, MooSendList>(0);
    }
}
```

```
public async Task<ICollection<MooSendList>> GetLists()
{
   var response = await _client.GetAsync($"https://api.moosend.com/v3/lists.json?apikey={_apiKey}\");
   var model = await Read<MooSendResponse<MooSendListContext>>(response);
   return model?.Context?.MailingLists;
}
```



Signup



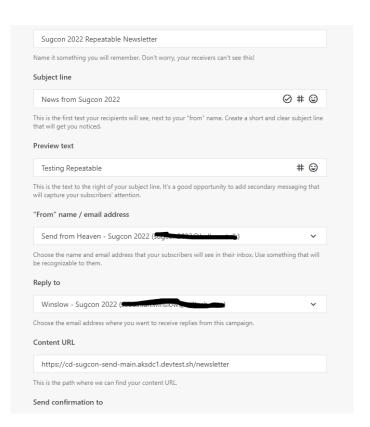
- Simple form leave out custom fields
- Sign up with interests (custom fields)
 - § Personalization tags
 - § Segments
 - § Conditions

```
[Route("/subscribe/{listId}"), HttpPost]
0 references | Jesper Balle, 7 hours ago | 1 author, 2 changes
public async Task<IActionResult> Index(string listId, MooSendSubscriberUpdate subscriber)
    var fields = await _service.GetListCustomFields(listId);
    subscriber.CustomFields = fields.Select(field => new
        field,
        postedValue = Request.Form[field.HtmlSafeName()],
    }).Where(x => !string.IsNullOrEmpty(x.postedValue))
    .Select(x =>
        var value = x.postedValue;
        if(x.field.Type == MooSendFieldType.Checkbox)
            value = "true";
        return $"{x.field.Name}={value}";
    .ToArray();
    try
        await _service.Subscribe(listId, subscriber);
        return Redirect($"/?subscribe=ok&email={subscriber.Email}");
    catch (Exception exc)
         return Redirect($"/?subscribe=error&error={exc.Message})"):
```

Dynamic newsletter



- Sitecore Send
 § Repeatable Newsletter
 - Content from URL



Sitecore Rendering Host
 § Custom Content Resolver

```
namespace SugCon.SitecoreSend.ContentResolvers
     public class NewsletterContentResolver : RenderingContentsResolver
         O references | Peter Sebastian Winslow, 3 days ago | 1 author, 1 change
         public override object ResolveContents(Rendering rendering, IRenderingConfiguration renderingConfig)
              var contextItem = GetContextItem(rendering, renderingConfig);
              return GetNewsletter(contextItem);
         1 reference | Peter Sebastian Winslow, 3 days ago | 1 author, 2 changes
         private object GetNewsletter(Item newsletterRoot)
              var newsletterItem = newsletterRoot.Children.OrderByDescending(a => a["__updated"]).FirstOrDefault();
              var newsletter = new
                  Title = newsletterItem["title"],
                  Text = newsletterItem["text"],
                  Articles = newsletterItem.Children.Select(x \Rightarrow new \{ Title = x["title"], Text = x["text"] \})
              return newsletter;
```

Webhook action



- Example: Writing context to the log
- Schema: <u>cdn.stat-track.com/send-to-webhook-context-schema.js</u>

```
[Route("/api/webhooks/incoming/moosend"), HttpPost]
Oreferences[Jesper Balle, 5 hours ago | 1 author, 1 change
public ContentResult WebHookPost([FromBody] object obj)
{
    _logger.LogInformation($"Received webhook POST: \r\n{JsonConvert.SerializeObject(obj, Formatting.Indented)}");
    return Content("OK");
}
[Route("/api/webhooks/incoming/moosend"), HttpGet]
Oreferences[Jesper Balle, 5 hours ago | 1 author, 1 change
public ContentResult WebHookGet([FromQuery] object obj)
{
    _logger.LogInformation($"Received webhook GET: \r\n{JsonConvert.SerializeObject(obj, Formatting.Indented)}");
    return Content("OK");
}
[Route("/api/webhooks/incoming/moosend"), HttpHead]
Oreferences[Jesper Balle, 5 hours ago | 1 author, 1 change
public ContentResult WebHookHead([FromQuery] object obj)
{
    _logger.LogInformation($"Received webhook HEAD: \r\n{JsonConvert.SerializeObject(obj, Formatting.Indented)}");
    return Content("OK");
}
```

- AutomationID
- StepId
- Event with properties (userid, name, timestamp etc.)
- Contexts for the action (Contact, Bounce, Location, Purchase, Link, Campaign, ContactChanged...)

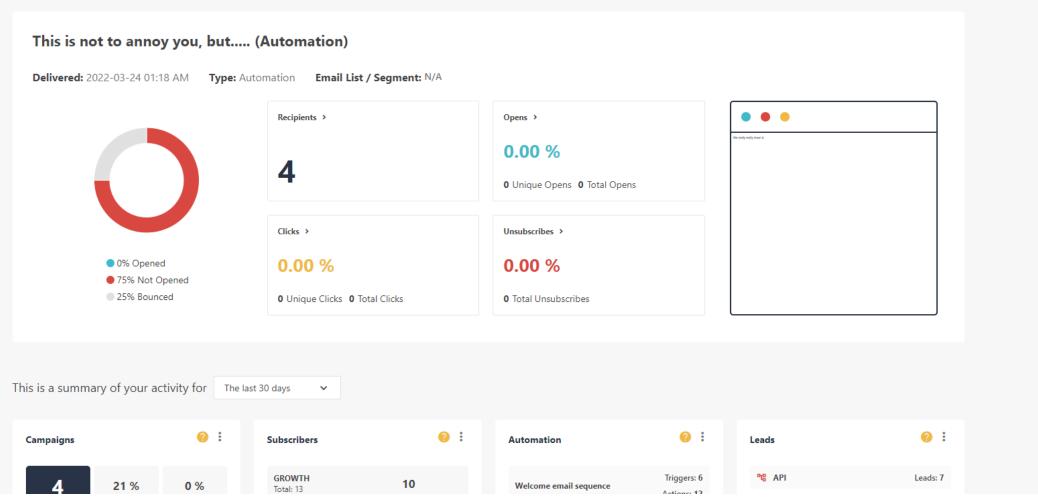


Overview



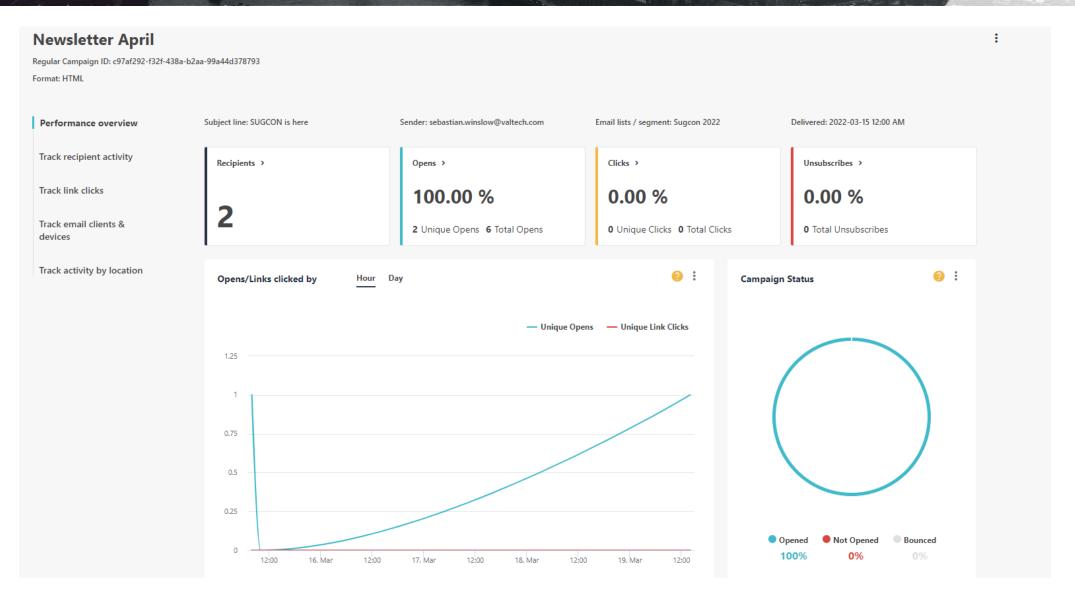
Welcome back, **Sebastian Winslow**

Latest sent campaign activity



Campaign





Activity

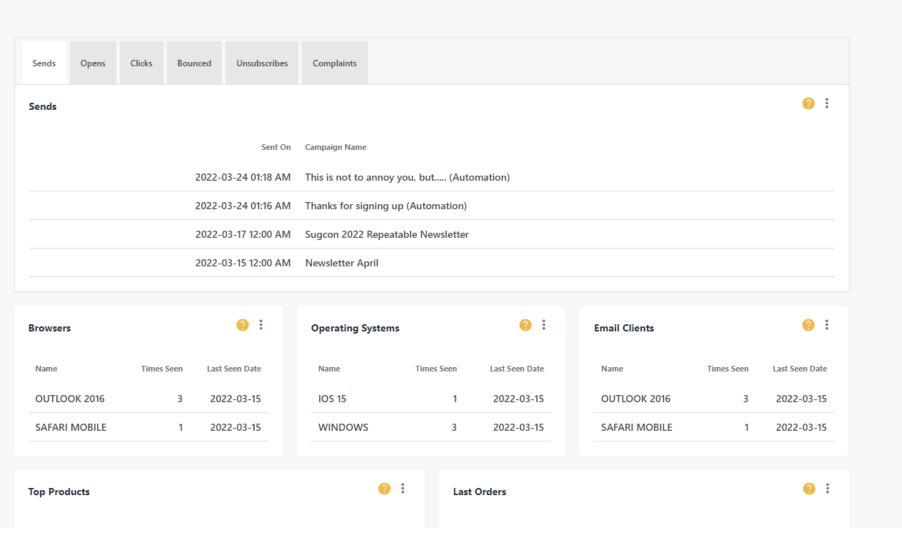


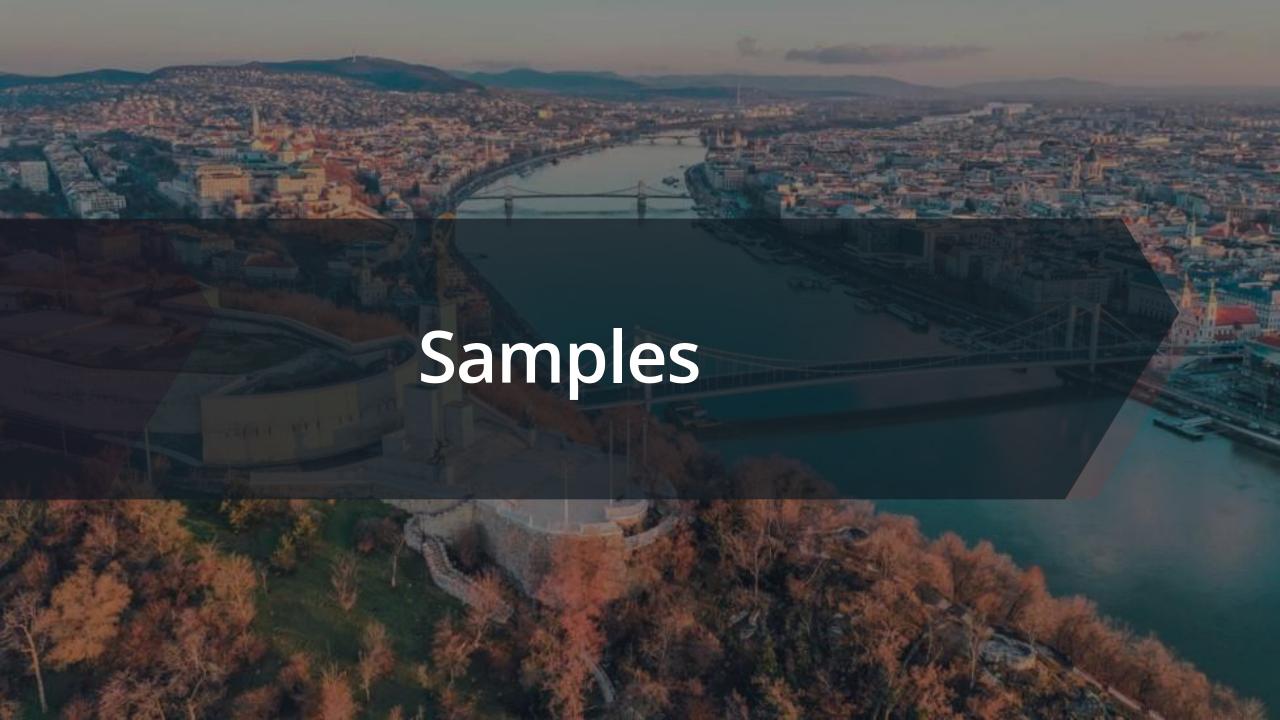
Person Activity

jesper.balle@valtech.com

This Campaign

All Campaigns





Newsletter x days



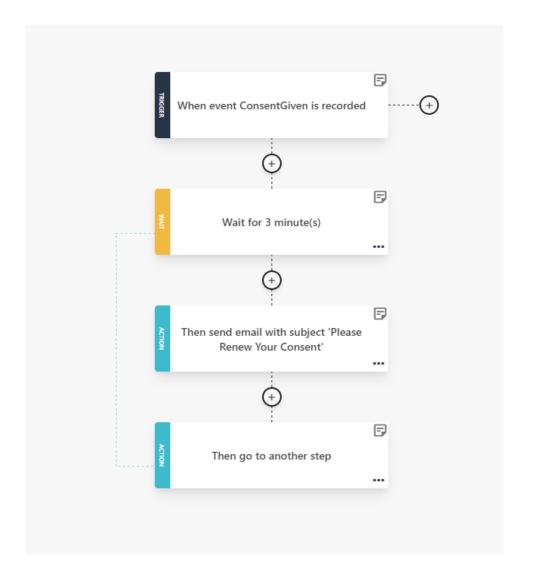
- Event: Subscribed to newsletter
- Condition:
 If within x days since last newsletter, send the newsletter otherwise do nothing
 - § Could do webhook to set a custom field, requires for Sitecore to know date for last dispatch.

- Send URL based campaign
 - § Send out email from Sitecore (no stats)
 - § Send out campaign with primary purpose of pointing to the webpage displaying dynamic newsletter (tracks the click)

GDPR Consent Simple



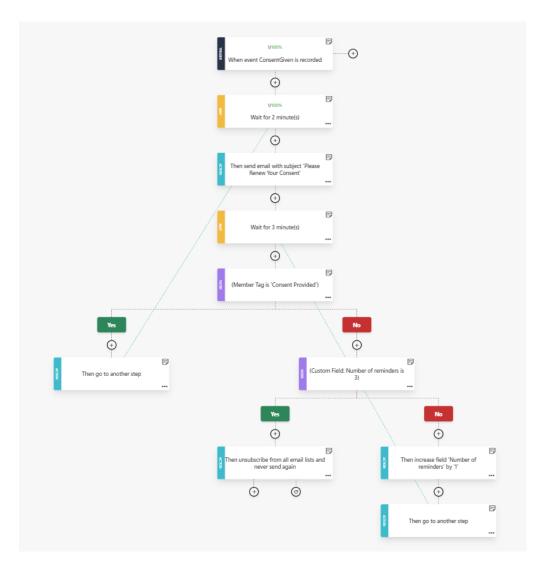
- Triggered by custom event
- Wait
- Send out request to renew consent
- Keep pestering recipient ©

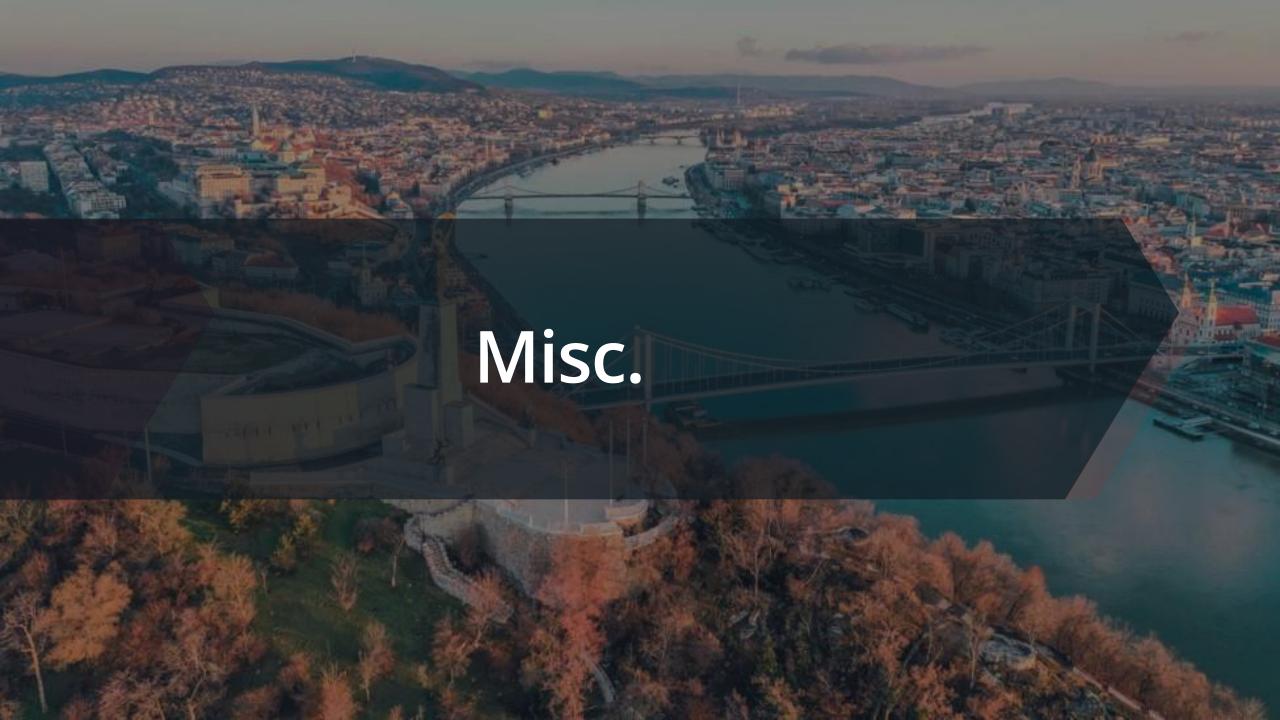


GDPR Consent Advanced



- Triggered by custom event
- Wait
- Send out request to renew consent
- Wait
- Validate if consents have been given
 - § If Yes go back to initial waiting stage (should also reset counter)
 - § If no validate if enough reminders have been sent
 - If yes Unsubscribe
 - If no Increase counter and loop





More Features



- In addition to what we have seen
 - § Subscription forms
 - § Landing pages
 - § Templates
 - § Custom reports (depending on plan)
 - § Import
 - § Export (CSV, PDF)

Wishlist



- Add your own actions/conditions
- Act on response from Webhooks
- View tracking data (pages and events)
- Add QS parameters with customfields dynamically to links
- Send campaign to single or selected members through API (not test)
- View members in automation state
- View members instead of campaigns or email lists as entry point
- Choose send URL campaign (to single person) as action
- Member stats are for 1 or all campaigns



Website Tracking

Our platform's website tracking is a web analysis service provided by our company.

The data collected is made available to the client for actionable insights (reporting, segmentation, and automation).

Direct access to the data is only provided to the client through the use of our platform.

The data may be used in anonymized and aggregated form from Moosend Ltd. for reporting purposes.

Visitor Tracking

Our platform's website tracking uses proprietary, cookie-based, technology to track data on end-user page visits, product views, user cart, and purchase information but not limited to product quantity and pricing. Data collection at any of the above levels can be turned on or off by the relevant client of our platform.

Our company has no control of the status or information shared through its website tracking feature. More specifically the cookie-technology stores:

- An identification number to uniquely identify a user's browser session.
- An identification number to uniquely identify a browser. It's not possible to uniquely identify a device through this feature
- An identification number to uniquely identify the relevant website.
- Relevant flags to enable or disable certain library features including but not limited to the exit-intent functionality

Identifying Specific Users

Our website tracking uses proprietary, cookie-based, technology to link the aforementioned data to a specific user identified by his email address. This setup allows for more accurate tracking of end-users by associating them with the same ID over various sessions and devices. This functionality is called Identify. Specific user data collection as part of the identify functionality can be turned on or off by the relevant client of our platform. Our company has no control of the status or information shared through its website tracking feature.

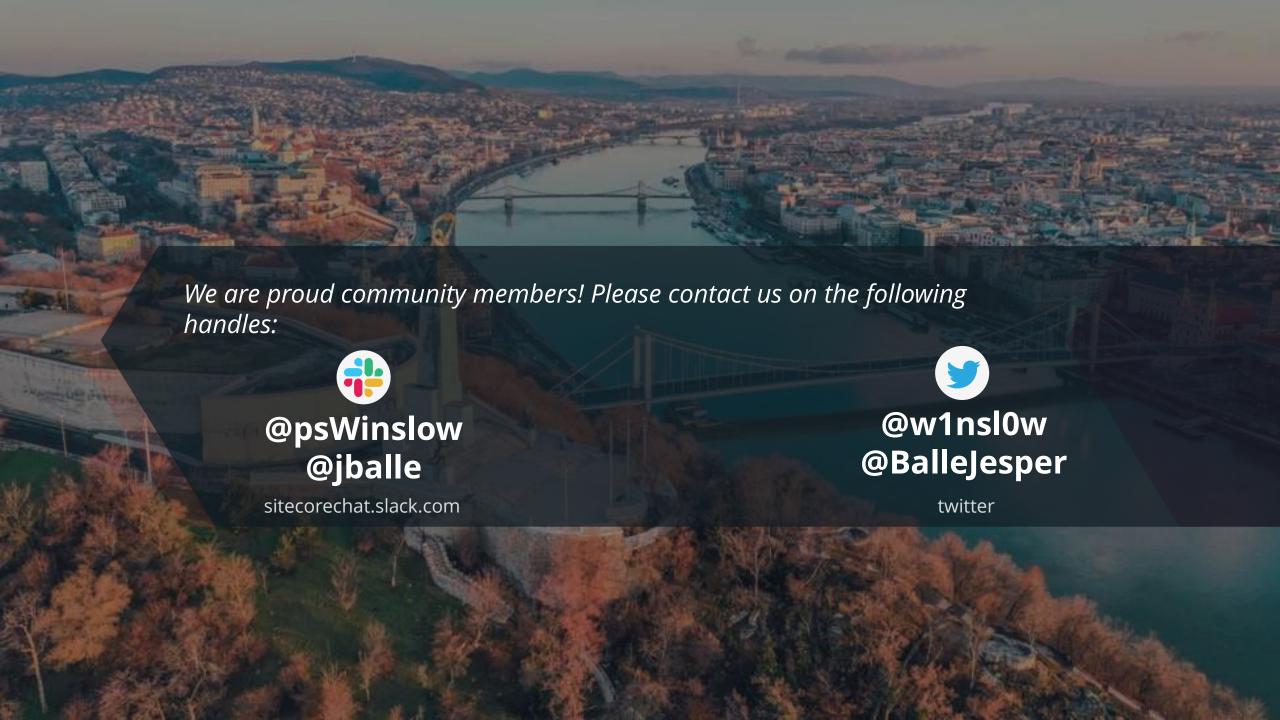
Ressources



- API
 - § https://moosendapp.docs.apiary.io
- Default integrations
 - § https://moosend.com/integrations/
- Github (this session)
 - § https://github.com/ValtechDK/SugCon2022- SitecoreSend

- Community blogs
 - § Miguel Minoldo (3 parts)
 - https://miguelminoldo.fr/2021/09/28/a-firstlook-at-moosend/
 - § Neil Killen
 - https://neilkillen.com/2022/01/23/generatingleads-with-sitecore-personalize-and-sitecoresend-moosend/
 - § James LePage
 - https://isotropic.co/moosend-review/







WUNDERMAN THOMPSON

Technology















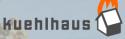
SUGDE

valtech_



delaware



















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sitecore.com/ukrainefund