

# Customer.io User Guide

**Customer.io** is a powerful customer communication platform that allows you to automate messaging based on user behavior and data. It's designed to help you send personalized emails, SMS, and push notifications at the right time, improving engagement and retention.

If you're new to Customer.io, this guide will walk you through the basics of using the platform, from creating your first campaign to sending automated messages.

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## 1. Getting Started with Customer.io

### Sign Up and Log In

1. **Sign Up:** Go to [Customer.io's website](#) and sign up for an account. If you already have an account, log in.
  2. **Set Up Your Workspace:** After logging in, you'll be prompted to set up your workspace, which is essentially your account's main environment where you'll manage campaigns, customer data, and communications.
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## 2. Integrating Customer.io with Your App or Website

To send messages based on user activity, you'll need to integrate Customer.io with your app, website, or other tools. You can do this using the following methods:

### Install the SDK

Customer.io provides SDKs for different platforms such as JavaScript (for websites), iOS, Android, and server-side libraries. These SDKs help you send events (like user sign-ups, purchases, or clicks) to Customer.io.

1. **Go to the Integrations Section:** Navigate to the **Integrations** section in your Customer.io account.
2. **Follow the Setup Instructions:** Depending on your platform (e.g., web, mobile, or server), follow the step-by-step instructions to install the appropriate SDK and send data to Customer.io.

### Send User Data (Events)

Once the SDK is set up, you can start sending user data (events) to Customer.io. For example, you can track when a user:

- Signs up for your service
- Makes a purchase
- Clicks a button

This data is essential for sending personalized messages at the right time.

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### 3. Creating Your First Campaign

Now that you've integrated Customer.io and are collecting user data, you can create your first campaign.

#### What is a Campaign?

A campaign in Customer.io is a series of automated messages triggered by specific user actions or events. For example, you might set up a welcome email campaign that is triggered when a new user signs up.

#### Steps to Create a Campaign:

1. **Go to the Campaigns Page:** In the left sidebar, click on **Campaigns**.
  2. **Create a New Campaign:** Click on the **Create Campaign** button.
  3. **Choose a Campaign Type:**
    - **Triggered Campaign:** These campaigns are triggered by a specific event, like a user signing up or making a purchase.
    - **Recurring Campaign:** These run on a set schedule, for example, sending weekly newsletters.
  4. **Define the Trigger:** Choose the event or action that will trigger the campaign. For example, when a user subscribes to your newsletter.
  5. **Add Messages:** Once the trigger is set, create the messages (emails, SMS, or push notifications) you want to send. You can use dynamic content and personalization to make each message feel more personal.
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### 4. Personalizing Your Messages

Customer.io allows you to create highly personalized messages using user data (like first name, location, or product preferences). This is essential for increasing engagement and conversion rates.

#### Using Personalization Tokens:

1. **Dynamic Data:** Use personalization tokens to insert dynamic content into your messages. For example, you can use `{{first_name}}` to address the user by their first name in emails.
2. **Custom Attributes:** You can also use custom attributes to personalize emails further. For example, if you store a user's product preferences, you can insert relevant product recommendations into your emails.

### Message Templates:

Customer.io also provides a drag-and-drop editor to create visually appealing email templates. You can choose from ready-made templates or create your own.

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## 5. Setting Up Triggered Messages

Triggered messages are messages that are sent automatically based on specific actions or events, such as when a user signs up or abandons their cart.

### Example: Sending a Welcome Email

1. **Create a Triggered Campaign:** When a new user signs up, you might want to send them a welcome email.
  2. **Set the Trigger:** Choose a trigger like "User signed up" from your integrated event data.
  3. **Create the Email:** Use the visual editor to create your welcome email, adding personalized content like the user's name and any other relevant data.
  4. **Activate the Campaign:** Once you're satisfied with the email content, activate the campaign so it sends automatically whenever a user signs up.
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## 6. A/B Testing Your Campaigns

A/B testing allows you to test different versions of a message to see which one performs better. This is useful for optimizing your emails and improving your engagement rates.

### Steps for A/B Testing:

1. **Create Variants:** In the campaign builder, you can create multiple versions of your email (e.g., different subject lines or calls to action).
2. **Set a Split Test:** Decide what portion of your audience will receive each version. For example, 50% get Version A and 50% get Version B.
3. **Measure Results:** After your campaign has run for a while, check the performance metrics (open rates, click-through rates) to see which version of your message performs better.

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## 7. Analyzing Campaign Performance

Once your campaigns are running, you'll want to monitor their performance to see how well they're performing and if any adjustments are needed.

### Metrics to Track:

- **Open Rate:** How many people opened your email.
- **Click-Through Rate (CTR):** How many people clicked on links within your message.
- **Conversion Rate:** How many people took the desired action (e.g., made a purchase, signed up).
- **Bounce Rate:** How many emails failed to reach their destination.
- **Unsubscribe Rate:** How many people unsubscribed from your emails.

Customer.io provides detailed reports and analytics, which can help you optimize your campaigns over time.

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## 8. Segmenting Your Audience

Segmentation allows you to send targeted messages to specific groups of users based on their behavior, attributes, or other criteria.

### Types of Segments:

1. **Behavioral Segments:** Based on user actions (e.g., users who added items to the cart but didn't complete a purchase).
2. **Demographic Segments:** Based on user attributes like location, language, or subscription plan.
3. **Custom Segments:** Create segments based on custom data points you send to Customer.io (e.g., users who viewed a particular product).

### Creating a Segment:

1. **Go to the "People" Section:** In the left sidebar, click on **People**.
  2. **Create a New Segment:** Use filters to define the segment criteria.
  3. **Use the Segment in Campaigns:** Once your segment is created, you can target it in any campaign or workflow.
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## 9. Automating Workflows with Journeys

Customer.io allows you to create **Journeys**, which are visual workflows for automating multiple steps in your messaging process. For example, you can set up an automated workflow to send:

- A welcome email
- A follow-up email after 3 days
- A reminder email for an abandoned cart

### Building a Journey:

1. **Create a Journey:** In the **Journeys** section, click on **Create New Journey**.
  2. **Define the Trigger:** Choose the event that triggers the journey (e.g., user signs up).
  3. **Add Steps:** Add actions such as sending emails, waiting for a certain period, or checking conditions (e.g., did the user open the email?).
  4. **Activate the Journey:** Once you've set up the steps, activate the journey to start automating your messaging.
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## Conclusion

Customer.io is a versatile and powerful tool for automating customer communications. By integrating it with your app, creating targeted campaigns, and personalizing messages, you can improve user engagement and drive conversions. With features like A/B testing, segmentation, and journey automation, you can continually optimize your messaging strategy and enhance your customer relationships.

As you get more familiar with the platform, you'll discover even more advanced features that will help you create sophisticated workflows and increase your marketing efficiency. Happy automating! 🚀