USER GUIDE

Getting started with Emarsys

Automations with Emarsys save time and money

optilyz

Emarsys, meet optilyz.
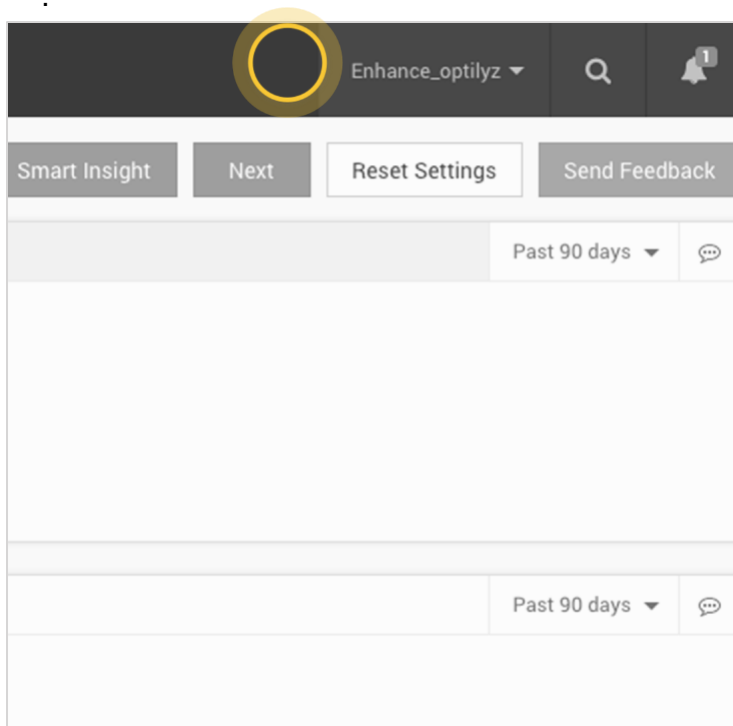
MAKING THE CONNECTION

In order to connect your Emarsys account with optilyz, we need to request that the channel first be activated.

To do this, we will ask Emarsys to share your Account ID with us.

☑ **Please provide the company account name associated with your Emarsys account**.

HELP US FIND YOUR DATA

Your automation data will be transferred to optilyz directly.

Please help us map the Emarsys data field names to optilyz fields so that we know what to do with it when it arrives.

The fields to the right are available within the optilyz platform. Required fields are marked with an *.

Note: address1 OR street and houseNumber are required

- title
- otherTitles
- gender
- firstName
- lastName *
- companyName1…3
- careOf
- individualisation1…9
- address1…2 *
- street
- houseNumber
- zipCode *
- city
- country

Field Editor

Custom and System fields	Voucher fields

Search [Search   ]

Field ID	Field String ID	Field name
10	address	Address
40	anniversary	Anniversary
24	company_annual_revenue	Annual Revenue (in 000 EUR)

☑ **What we need from you is the corresponding Field String IDs within Emarsys. These can be found under Admin > Field Editor.**

Mapping Emarsys

Need an example?

The default mappings for a new Emarsys-optilyz integration would resemble those below.

☝ Important: Once we receive and confirm your mapping, you will be able to continue to Step 3, testing.

☑ **Please provide your mapping data to us via your customer support representative or by email to support@optilyz.com**

☑ DO THIS:

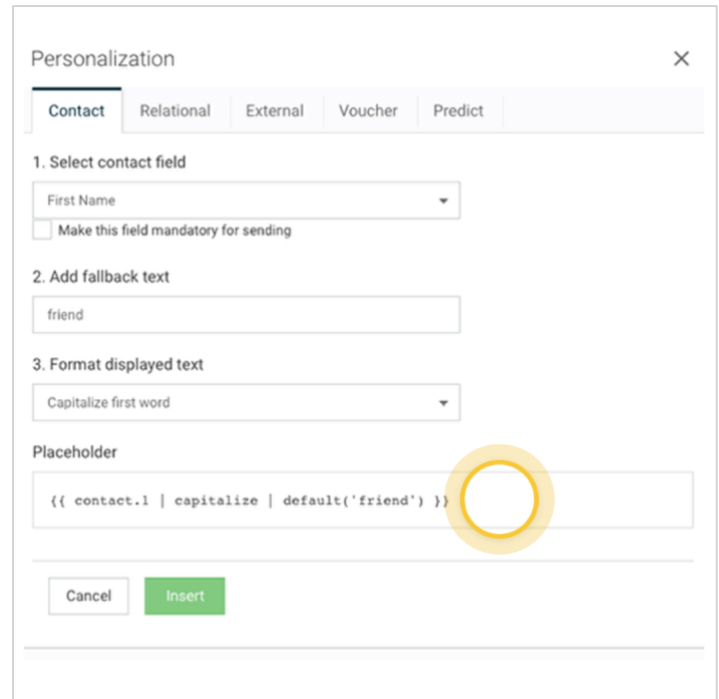|	
title:	salutation
otherTitles:	title
firstName:	first_name
lastName:	last_name
companyName1:	company_name
address1:	address
zipCode:	zip_code
city:	city
country:	country

Pro-level: Personalization Service

In addition to standard data fields, you can further customize your mailings with data from 5 additional sources.

- Data from their Emarsys contact database
- Vouchers
- External data using the API and external events.
- The Relational Data Service
- Predict

More information on using the personalization service can be found here: **Visit** ☞

☑ Please provide us any personalization fields you would like to use by mapping optilyz individualization fields with Emarsys personalization service placeholders.

To: support@optilyz.com
Subject: Personalization mappings

Dear optilyz,

Please add the following mappings to my account:

Individualisation1 : {{ rds.AWS_RDS.preferences(contact.100008453)[0].favoriteColor }}

Individualisation2 : {{ rds.AWS_RDS.preferences(contact.100008453)[0].defaultSize }}

Xoxo,

Your favorite customer.

Voucher codes

If you can't measure it, you can't improve it.

Adding voucher codes to your mailings is crucial to tracking your campaign's performance.

Emarsys allows you to provide voucher codes from dedicated voucher pools configured under Admin > Voucher Management.

1. **Select [Add New Pool] to create a new pool of voucher codes.**

2. **Upload a CSV file containing a single column of unique voucher codes.**

Voucher Pool

Pool name

Emarsys Integreation Test Pool

Admin	Phelan
Date created	2018-07-12 17:45:29

Upload code list

VC-Short-1000.csv   📁 Choose File

Upload

Send reminder to upload new codes when [100] codes left in pool.

Send reminder to the following email address(es):

max@muster.com

☐ Do not send emails if voucher pool is empty

Enter default text which appears in email when pool is empty and/or has not been refilled in time:

Please note that your voucher pool is approaching empty.

☑ **Under the Visuals step in optilyz, select [Add vouchers]. If you would like to use personalized code, then provide the name of the voucher pool containing your codes.**

Visuals   What do I need to upload?

Postcard
Maxi Postcard, 300g, Picture printing paper matt, 2 pages, Full color, Standard personalisation postcard

˅ Print files - 1 variations

Variation	Volume	Voucher
Unique	1	No

A/B TEST   ADD VOUCHERS

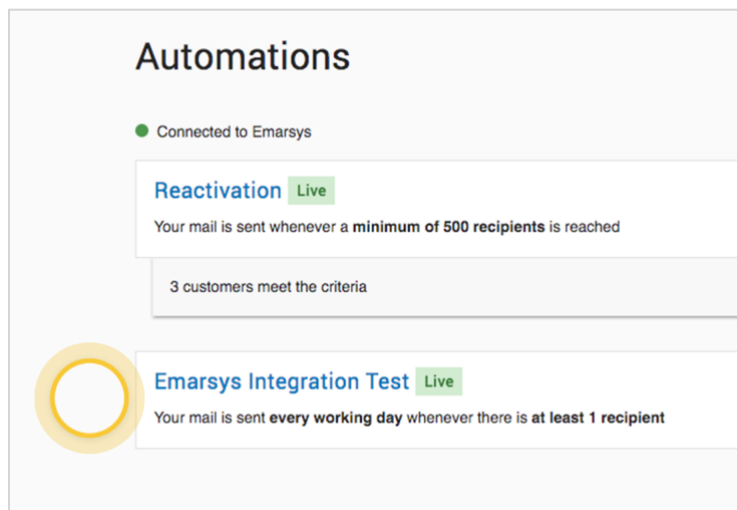> Personalised example - Uploaded
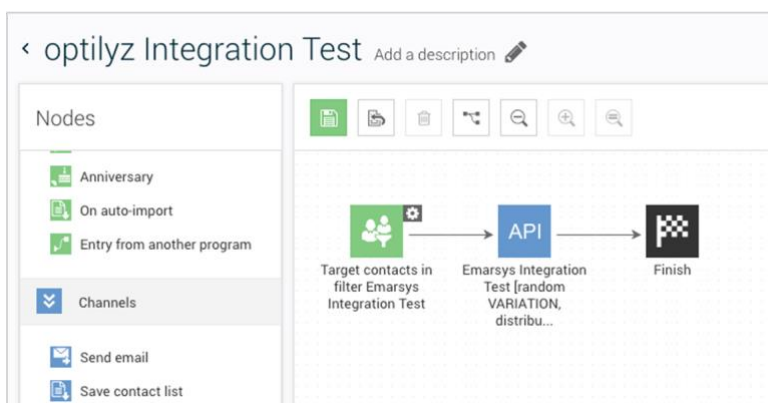
Let's test it out

THE MOMENT OF TRUTH

Before going into production mode, let's test that we've configured everything correctly.

☑ **Create an automation on the optilyz platform called 'Emarsys Integration Test'.**

Our operations department knows to ignore any campaigns created by these automations.

Automations

● Connected to Emarsys

Reactivation Live
Your mail is sent whenever a **minimum of 500 recipients** is reached

3 customers meet the criteria

Emarsys Integration Test Live
Your mail is sent **every working day** whenever there is **at least 1 recipient**

Meanwhile, over at Emarsys…

‹ optilyz Integration Test Add a description ✏

Nodes

Anniversary
On auto-import
Entry from another program

Channels

Send email
Save contact list

Target contacts in filter Emarsys Integration Test → API Emarsys Integration Test [random VARIATION, distribu... → Finish

1. **Create a test segment from your available contacts.**
   Tip: Be sure to add a filter, otherwise you will not be able to use the segment. We suggest setting zip code as not empty.

2. **Within the Automation Center, create a new program using the newly created segment as the entry point.**
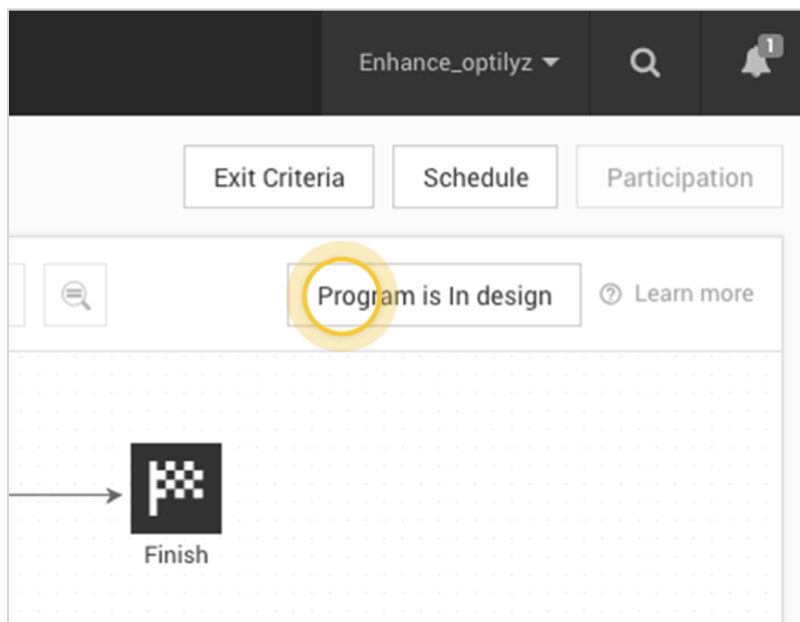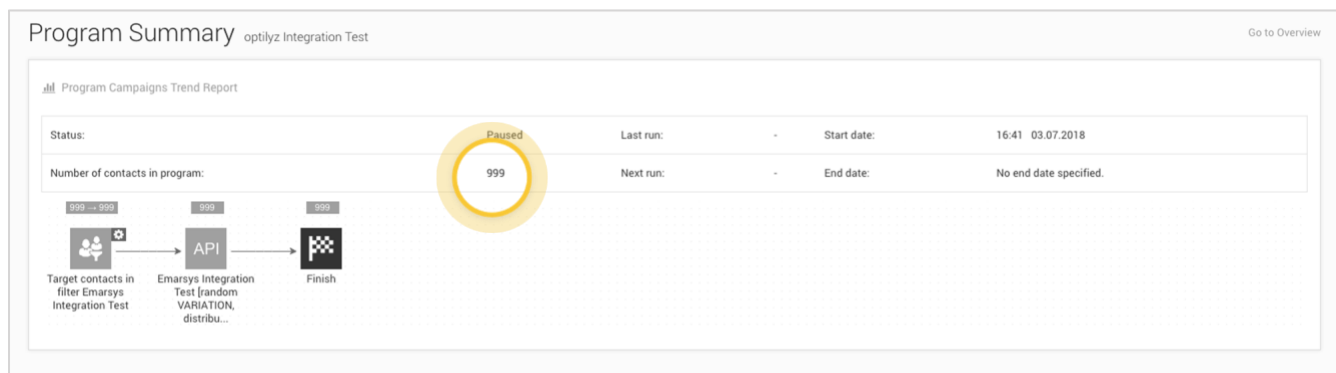
Let's test it out

Still over at Emarsys…

3. Attach the optilyz API node and select your Emarsys Integration Test automation.

4. Select the button [Program is In Design] on the upper right corner of the program builder. **Press [Launch].**
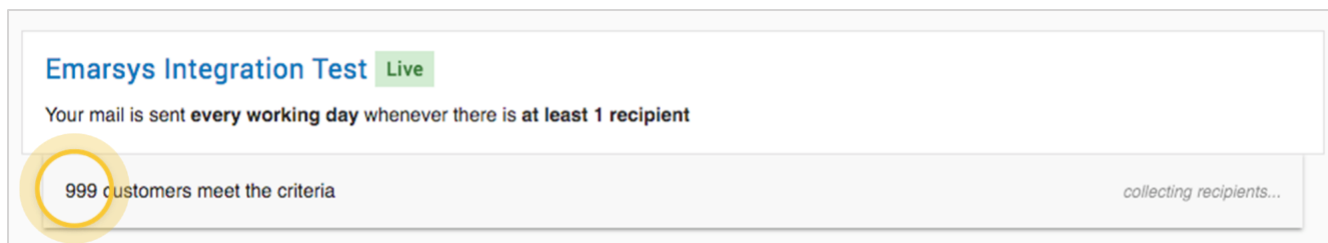

Within the Emarsys Automation Center, select to view the summary of your test program. The report indicates how many contacts should have been sent to the automation.

Wrapping it up.

We're almost done…promise.

Emarsys Integration Test [Live]

Your mail is sent **every working day** whenever there is **at least 1 recipient**

999 customers meet the criteria

collecting recipients…

☑ **Navigate to automations and confirm that the correct number of recipients are enqueued for the test automation.**

CONGRATULATIONS
This concludes your test.

You can delete the program in Emarsys and the optilyz automation.
To delete the automation, select the automation from the automations list; change its state to 'Edit'. Return to the automations list where you are now able to delete the automation.

You are now ready to start automating direct mail with Emarsys and optilyz.

Made with ♥ in Berlin.