

# **Starter Guide**

## Inxmail Commerce

Last updated: 2 May 2019

© 2019 Inxmail GmbH, Wentzingerstr. 17, 79106 Freiburg, Germany

Tel.: (+49-761) 296979-0 | Fax: (+49-761) 296979-9

info@inxmail.de | [www.inxmail.de](http://www.inxmail.de)

This publication is protected by copyright. All rights reserved, especially the right of translation, reproduction, photocopying or copying in any other form, and storage in electronic form.

Names, trade names, commodity names etc. used in this publication may be brand names or trademarks and therefore subject to legal requirements, despite the fact that they are not labelled as such.

# Contents

<b>1</b>	<b>What's in this Starter Guide</b>	<b>1</b>
<b>2</b>	<b>How to read this Starter Guide</b>	<b>2</b>
<b>3</b>	<b>About Inxmail Commerce</b>	<b>4</b>
<b>4</b>	<b>Before you begin: understanding placeholders</b>	<b>6</b>

## PART 1

<b>5</b>	<b>Connecting the source system technically to Inxmail Commerce</b>	<b>7</b>
5.1	Installing the Inxmail integration .....	7
5.2	Connecting the source system to Inxmail Commerce.....	9
5.3	Setting up email sending via Inxmail Commerce .....	12

## PART 2

<b>6</b>	<b>Specifying data to be transferred from the source system to Inxmail Commerce</b>	<b>14</b>
6.1	Specifying mailing types and events .....	14
6.2	Specifying the contents of the transactional emails .....	15

## PART 3

<b>7</b>	<b>Specifying data received by Inxmail Commerce – configuring events</b>	<b>17</b>
7.1	Configuring events.....	17
7.2	Understanding event tags (event XML) .....	18
7.3	Creating an event in Inxmail Commerce.....	20

## PART 4

<b>8</b>	<b>Creating mailings in Inxmail Commerce</b>	<b>25</b>
8.1	Mailings consist of modules .....	25
8.2	Creating a mailing – settings.....	26
8.3	Creating a mailing – adding modules .....	28
8.4	Creating a mailing – inserting placeholders .....	29

## PART 5

<b>9</b>	<b>Setting up workflows in Inxmail Commerce</b>	<b>30</b>
9.1	Use case – Various mailings for German and English recipients .....	31
9.2	Integrating a mailing into a workflow.....	31

## 1 What's in this Starter Guide

### Source system, event, mailing, workflow

This Starter Guide will give you an introduction to *Inxmail Commerce*. It should help you to understand the main functional areas of *Inxmail Commerce* – *event, mailing, workflow* – and their interaction with your source system (for example, your online shop). Even a basic understanding of the interaction of *Inxmail Commerce* and the source system can be helpful at many points in the connection of a specific source system.

### Make settings and carry out action steps

In this Starter Guide, you will find detailed step-by-step instructions in respect of main settings and actions in *Inxmail Commerce*. Due to the limitations of a starter guide, you will also find more general or basic information. Often this information can be sufficient to carry out particular settings or actions. Your prior knowledge in relation to the respective topic may also play a role here.

### Limits and further information

This Starter Guide frequently refers to further information, in particular to the documentation of the respective source system and also to sections in the *Inxmail Commerce* online help. In the case of the source systems, this is due to the fact that the connection of the respective source systems can be very different. With regard to the *Inxmail Commerce* functionalities, the intention of this Starter Guide is to describe only the main functional areas and setting options. References are made to the *Inxmail Commerce* online help, where you can find details and more in-depth information.

### Terms

**Email, transactional email** In this Starter Guide, the terms 'email' and 'transactional email' are used synonymously. Use of the shorter form 'email' improves readability at many places in the document.

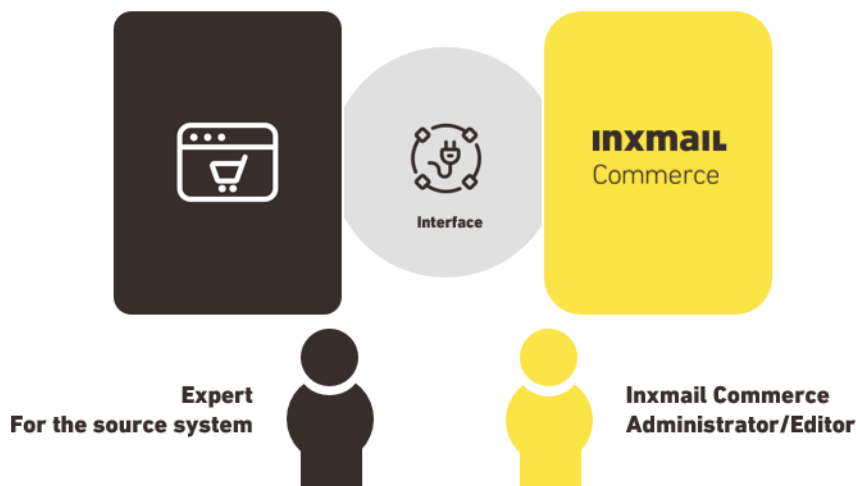
**Mailing type** Refers to different types of transactional emails. Examples of mailing types are order confirmations, reminders about items left in shopping baskets, payment reminders, and so on.

**Mailing** Mailings serve as a template or basis for the transactional emails to be sent. You create a mailing in *Inxmail Commerce*. This mailing contains, on the one hand, the information that remains the same in the transactional email. This may include the sender address or the company logo. On the other hand, dynamic information is added, which changes per recipient. This may include the delivery address and the product data. Based on the mailing, the specific transactional email is generated for the respective recipient. That is to say, recipients receive specific transactional emails. In *Inxmail Commerce* there are mailings, on the basis of which these are generated.

## 2 How to read this Starter Guide

*Inxmail Commerce* is not a stand-alone application. Rather, it is characterised by its simple and flexible connection to source systems. Knowledge of the source system and of *Inxmail Commerce* is therefore required for setting up *Inxmail Commerce* and its interaction with the source system. To later work with *Inxmail Commerce* (on a daily basis), knowledge of the source system is usually no longer required.

This Starter Guide is divided into five parts. These are aimed at people with different roles or knowledge. At the same time, the sections describe actions that are usually performed only once when setting up the interaction of *Inxmail Commerce* and the source system, and actions that have to be performed again and again when working with *Inxmail Commerce* on a daily basis.



Below is an overview of the five main parts of this Starter Guide. The person who should read the respective part is specified in each case, as are the permissions and (prior) knowledge that this person should have.

### Part 1: Connecting the source system technically to Inxmail Commerce



Experts who have technical knowledge of the source system. Usually you have administrator permissions for the source system.



The first part of this Starter Guide describes how to set up the (technical) connection between the source system and *Inxmail Commerce*. This begins with the download and installation of the respective integration software or plug-in. It also includes the storing of the *Inxmail Commerce* REST API credentials in the source system. The actions described in this part are setup activities that are done only once.

### Examples

*Inxmail Commerce* can be connected to countless source systems. Many steps in the connection of *Inxmail Commerce* to source systems are similar in principle. In detail, however, they can differ for each source system.

To be able to cite specific action steps in this Starter Guide, examples are given for the online shop *Shopware*. In general, the examples should help you perform similar steps for your source system. You will also find instructions on the pages of the manufacturers of the integration.

Information on *Shopware* can be found on the [Shopware website](#).

## Part 2: Specifying information/data to be transferred from the source system to Inxmail Commerce



Experts who have technical knowledge of the source system and an understanding of which information is to be transferred in the transactional emails. Usually you have administrator permissions for the source system.

The actions described in this part are setup activities usually done only once. The setup can be later adjusted if changes are to be made in relation to the data to be transferred.



The second part of this Starter Guide describes how to define the data to be transferred and where its transfer to *Inxmail Commerce* is defined.

## Part 3: Setting up the events in Inxmail Commerce



Experts who have administrative knowledge in *Inxmail Commerce*. You must have administration permissions in *Inxmail Commerce*. The actions described in this part are setup activities usually done only once.

The setup can be later adjusted if changes are to be made in relation to the data to be transferred.



This part describes how to set up events in *Inxmail Commerce*, including how to configure the event XML.

## Part 4: Creating mailings in Inxmail Commerce



*Inxmail Commerce* editors. You must have (at least) editor permissions in *Inxmail Commerce*. To create (and not just edit) mailings, you need workspace administrator permissions.



This part describes how to create mailings using the *Mail Builder* in *Inxmail Commerce*. This involves, in particular, the use of modules and placeholders in a mailing.

## Part 5: Setting up workflows in Inxmail Commerce



*Inxmail Commerce* workspace administrators. You must have workspace administrator permissions in *Inxmail Commerce*.



This part describes how to set up workflows in *Inxmail Commerce*. To start with, this involves activating the sending of mailings by *Inxmail Commerce*. Then there are ways to control the sending of mailings, for example, by specifying the sending time or by making sending conditional.

## Further information in the Inxmail Commerce online help



This icon precedes links to the [Inxmail Commerce online help](#). There you will find further information.

## 3 About Inxmail Commerce

### What Inxmail Commerce is

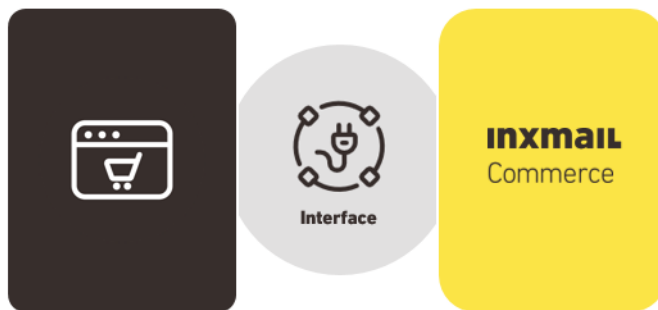
*Inxmail Commerce* is a powerful application for creating and sending transactional emails.

'Transactional emails' are emails that are triggered by automated means as a result of visitor or user actions in Web shops, online portals, booking systems, communities, social networks or similar systems. Such systems are referred to below as 'source systems'. A transactional email is always triggered through a specific event in a source system.

**Example** You order a product in an online shop. Just a few seconds after clicking the 'Place Order' button, you receive an email with all relevant information about your order, such as the product number, product price, delivery address, and so on. By clicking the 'Place Order' button, you trigger a purchase event.

### How Inxmail Commerce interacts with the source system

*Inxmail Commerce* is not a stand-alone application. Rather, *Inxmail Commerce* has been developed to receive information/data from connected systems, prepare this information/data and (in most cases) finally forward it as an email.



### Possibilities for connecting Inxmail Commerce to source systems

The transfer of the data from the source system to *Inxmail Commerce* (and possibly also back again) can be carried out technically using a REST API interface or via SMTP using the so-called email connector.

This Starter Guide describes only the connection using the REST API interface.

 [Email connector \(SMTP\)](#)

### Edit transactional emails or (only) send transactional emails

*Inxmail Commerce* offers two main application scenarios.

**Inxmail Commerce as an email sending system** In this application, the transactional emails are created and/or edited by an editor in *Inxmail Commerce*. The editor enters the basic settings (for example, the sender address), defines the modular structure of the transactional email and inserts placeholders at the desired locations. Suitable values for the respective recipient from the source system are subsequently assigned to these placeholders.

**Inxmail Commerce as a mail relay system** In this application, you use *Inxmail Commerce* to send the transactional emails that your source system generates. The emails are therefore not edited in *Inxmail Commerce*. In this scenario, you benefit from the powerful sending technology of *Inxmail*

*Commerce*. You can be sure that your emails will arrive reliably. Furthermore, you have at your disposal bounce management and reporting functionality.

Generally speaking, only one-time setup activities are required for this scenario. Therefore, this scenario is not discussed in further detail in this Starter Guide.

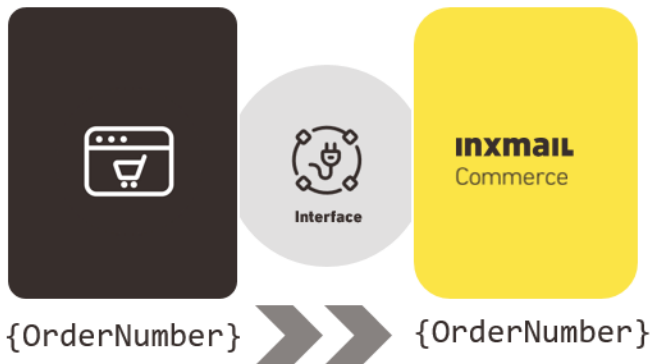
 [Inxmail Commerce Mail relay](#)



## 4 Before you begin: understanding placeholders

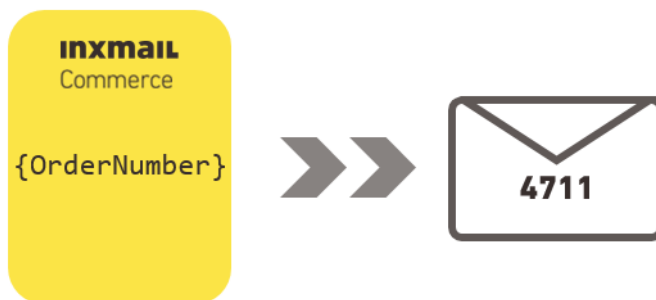
To be able to use *Inxmail Commerce*, it helps if at this point you already have an understanding of how placeholders work. (In many systems, placeholders are also called variables.)

The main process when using *Inxmail Commerce* is the transfer of data from the source system to *Inxmail Commerce*. The data is not transmitted 'statically', but using placeholders.



The placeholders transferred from the source system to *Inxmail Commerce* are available to you in *Inxmail Commerce* at all the relevant places. For example, in the *Mail Builder*, you can select the desired placeholder from a drop-down list. When the transactional email is sent, the placeholder is replaced by the information for the respective recipient. So you only need to insert the placeholders for the desired information once into the mailing. The correct contents for the recipient are automatically inserted instead of the placeholders. Detailed information can be found in the section *Creating a mailing – inserting placeholders* page 29.

**Example** The `{OrderNumber}` placeholder is used in the *Inxmail Commerce* editor. The placeholder is replaced by the order number 4711 in the transactional email sent.



## PART 1

### 5 Connecting the source system technically to Inxmail Commerce

To be able to connect *Inxmail Commerce* to your source system, you need appropriate integration software or a plug-in. The plug-ins are programmed specifically for the connection of the respective source system to *Inxmail Commerce*.

#### 5.1 Installing the Inxmail integration

The plug-ins for your source system are usually available for download or installation on the platforms of the manufacturers of your source system. Some integrations are manufactured and sold by Inxmail. Most integrations are manufactured and sold by the source system manufacturer or third-party vendors.

Get in touch with your Inxmail contact person for more information.

Here you will find a selection of common source or online shop systems, for which integrations with *Inxmail Commerce* exist.

Source system	Reference and information source
OXID	<a href="#">OXID exchange</a>
Magento	<a href="#">Magento 1 Package</a>
SAP	<a href="#">App Center SAP Marketing Cloud</a>
Shopware	<a href="#">Inxmail Connect for Shopware</a>
Spryker	<a href="#">Spryker Documentation</a>

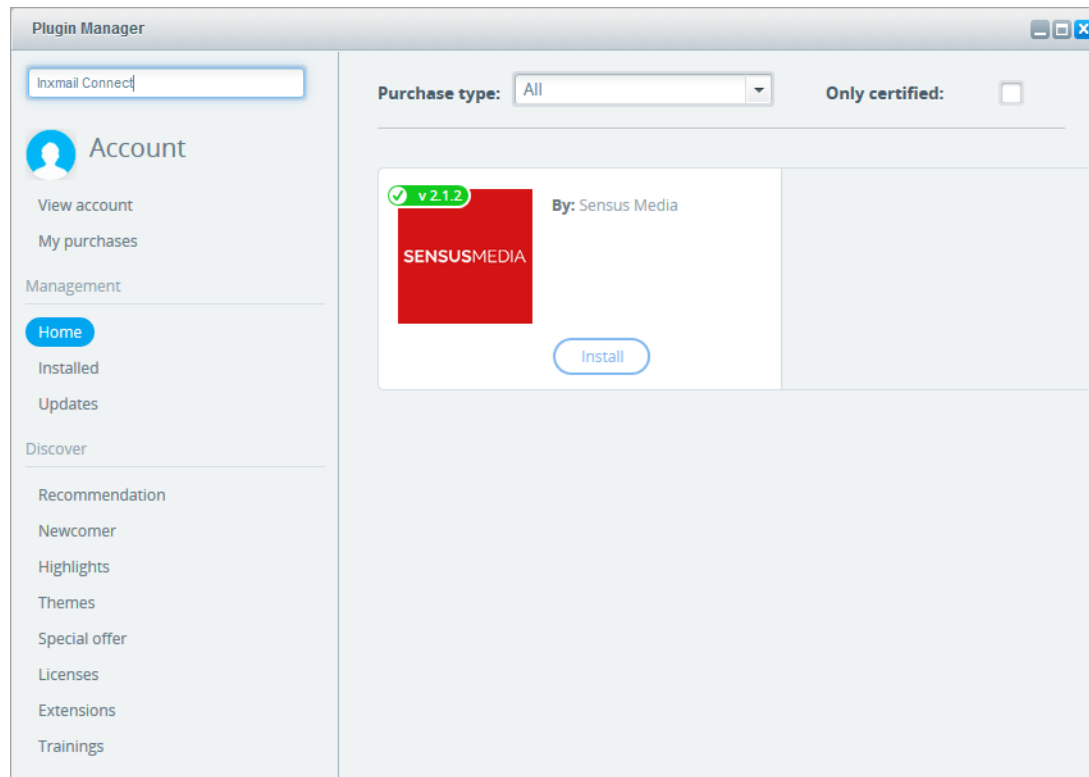
Further information can be found on our integrations for [Inxmail Commerce webpage](#).

## Installing the plug-in

The first step is to install the plug-in for connecting your source system to *Inxmail Commerce*. To do so, you usually need administration permissions for your source system.

### Example using Shopware

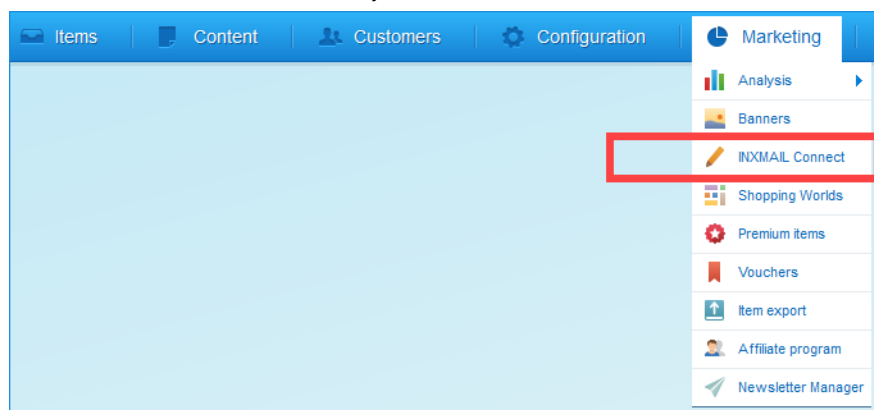
1. Under the *Configuration* menu item, select *Plugin Manager*.
2. Search for *Inxmail Connect*.



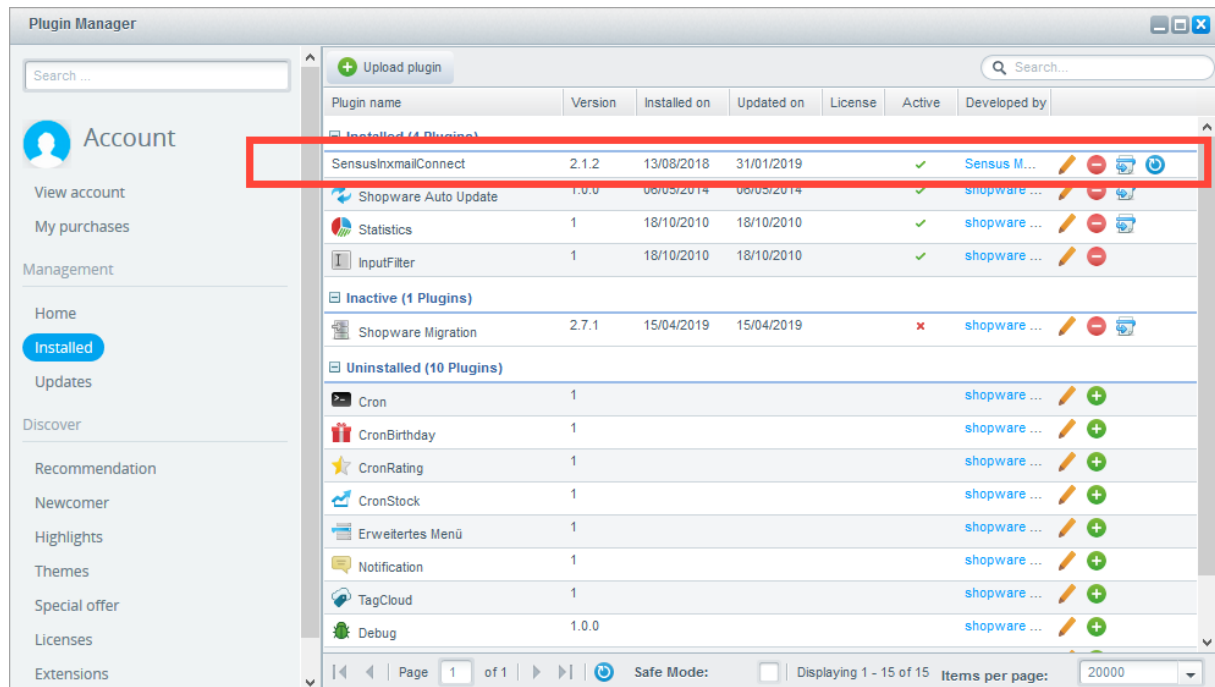
3. Click *Install* and follow the instructions displayed.

## After the installation

After successful installation, you will find *INXMAIL Connect* under the *Marketing* menu item.



In addition, in the Plugin Manager, you will find *INXMAIL Connect for Shopware* under *Installed*.



## 5.2 Connecting the source system to Inxmail Commerce

After installing the *Inxmail Commerce* plug-in, you must connect your source system to your *Inxmail Commerce* workspace.

### Inxmail Commerce workspace

As soon as you are a *Inxmail Commerce* customer, Inxmail GmbH will set up a *Inxmail Commerce* account for you. An account is an administrative unit.

One or more workspaces belong to an account. A workspace is an independently usable working environment with its own user interface and data storage. As soon as you have logged into *Inxmail Commerce*, you are in your workspace. This is where you perform tasks such as creating mailings or setting up workflows.

To connect your source system to your *Inxmail Commerce* workspace, the following two steps are usually required:

#### 1. Store the workspace ID of the *Inxmail Commerce* workspace in the source system

The ID of your *Inxmail Commerce* workspace can be found in the URL of your workspace.

You will find it between <https://> and [app.inxmail-commerce.com](https://demo.app.inxmail-commerce.com).

#### Example

<https://demo.app.inxmail-commerce.com>

Here, the ID of the *Inxmail Commerce* workspace is: *demo*

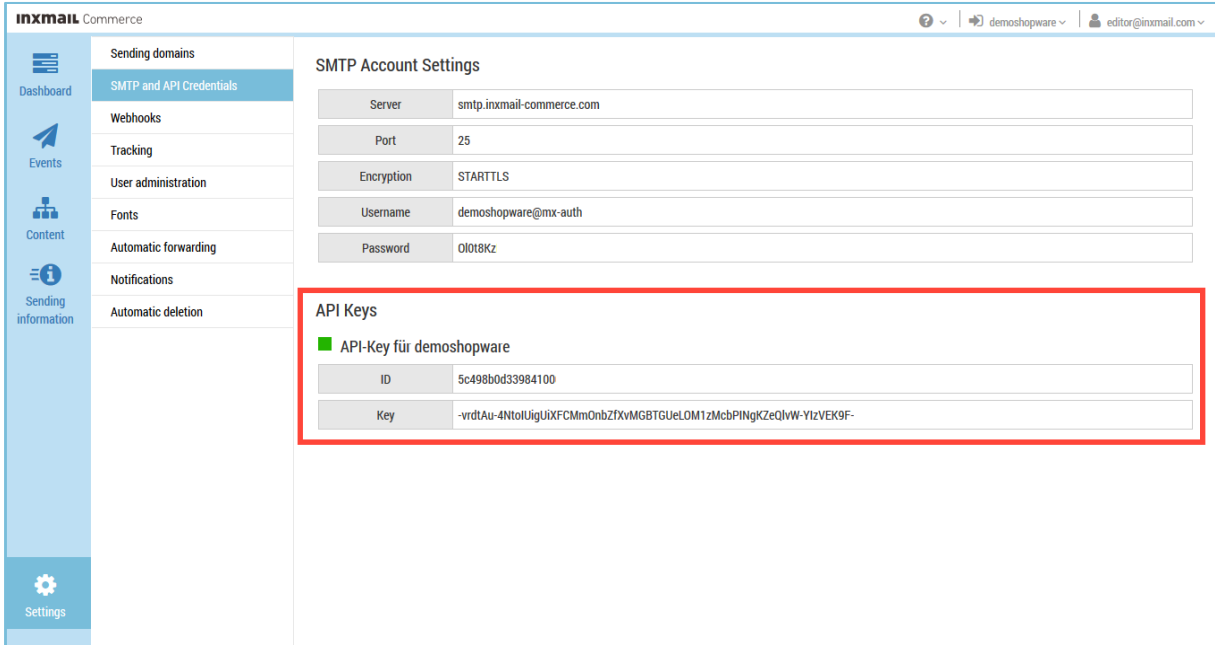
Copy the workspace ID and store it in the appropriate place in your source system.

## 2. Store the credentials for your *Inxmail Commerce* workspace in the source system

The (API) credentials for your *Inxmail Commerce* workspace can be found at the following place in *Inxmail Commerce*:

*Settings > SMTP and API credentials*

**Note** You need appropriate permissions to access this menu item.



The screenshot shows the Inxmail Commerce settings interface. On the left is a sidebar with navigation options: Dashboard, Events, Content, Sending information, and Settings. The main content area is titled 'SMTP Account Settings' and contains two sections. The first section, 'SMTP Account Settings', has a table with the following data:

Server	smtp.inxmail-commerce.com
Port	25
Encryption	STARTTLS
Username	demoshopware@mx-auth
Password	0l0t8Kz

The second section, 'API Keys', is highlighted with a red border and contains a table with the following data:

■ API-Key für demoshopware	
ID	5c498b0d33984100
Key	-vrdtAu-4NtoUigUjXFCMmOnbzfxvMGBTGueLOM1zMcbPINGKZeQJvW-YIzVEK9F-

Copy the API credentials for your *Inxmail Commerce* workspace and store them in the appropriate place in your source system.

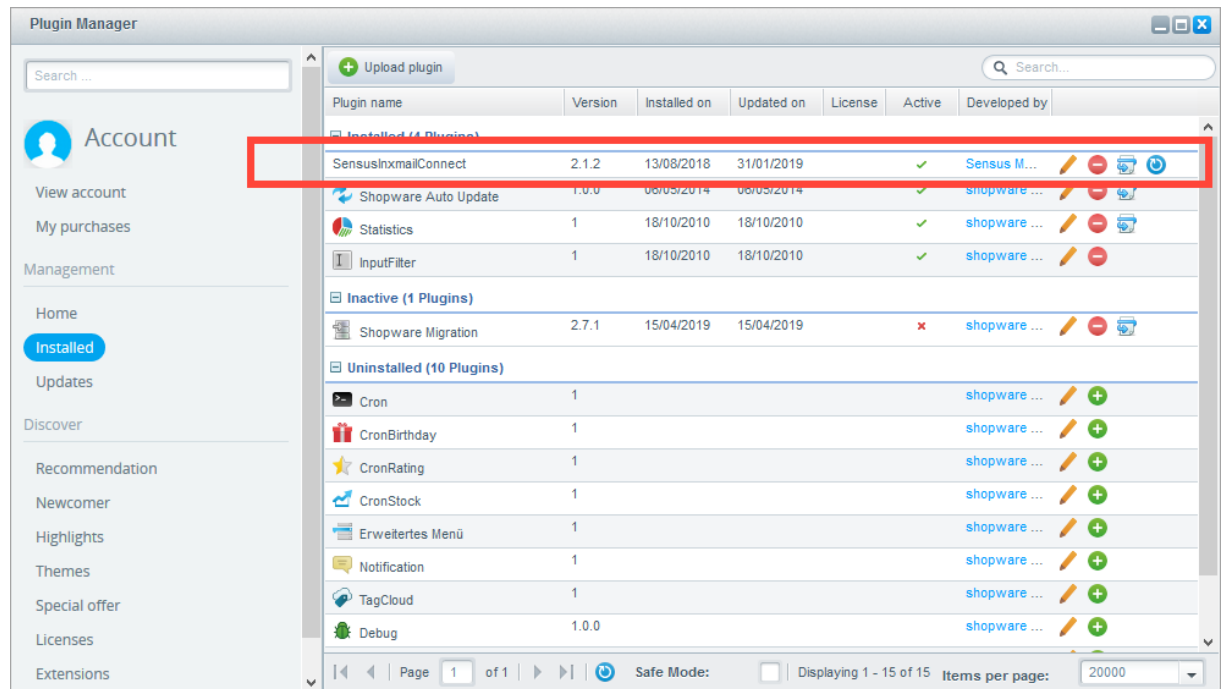
## Example using Shopware

### Step-by-step

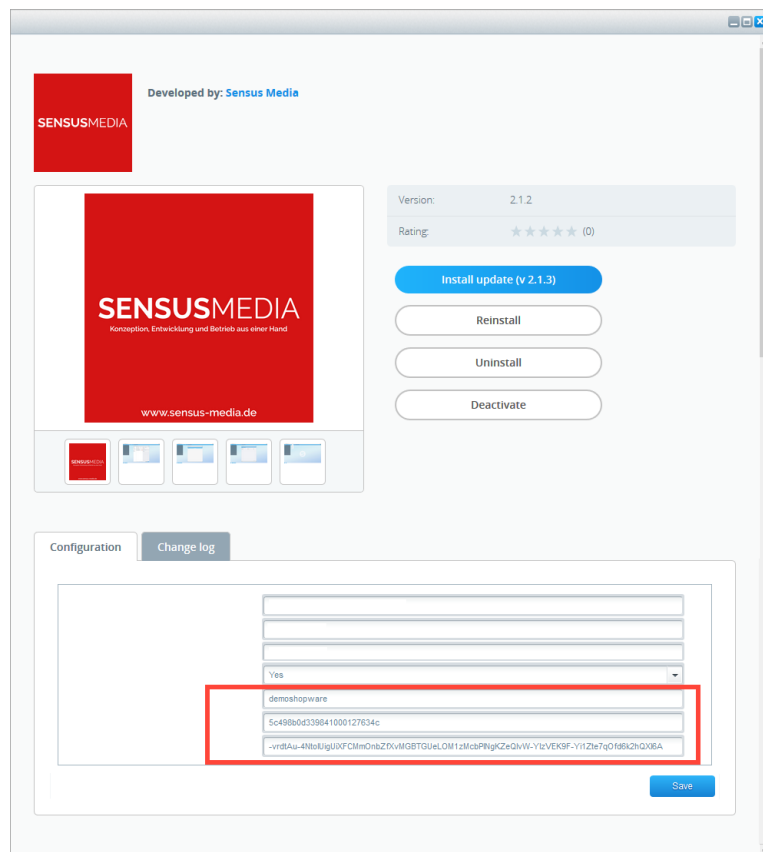
To connect *Shopware* to an *Inxmail Commerce* workspace, proceed as follows:

1. Under the *Configuration* menu item, select *Plugin Manager*.  
The *Plugin Manager* start page opens.
2. Click the *Installed* menu item.

The installed plug-ins are displayed.



- Click the pencil icon (*Open*) contained in the *INXMAIL Connect for Shopware* row.  
The plug-in is started.



- On the *Configuration* tab, go to the end of the list.

The fields in which you must enter the *Inxmail Commerce* workspace ID and the *Inxmail Commerce* API credentials are displayed at the end of the list.

Name	Description
Inxmail Commerce Space ID	Here you enter the ID of the <i>Inxmail Commerce</i> workspace.
Inxmail Commerce Key ID	Here you enter the ID of the <i>Inxmail Commerce</i> API credentials.
Inxmail Commerce Secret	Here you enter the key of the <i>Inxmail Commerce</i> API credentials.

✓ You have connected *Shopware* to an *Inxmail Commerce* workspace.

## 5.3 Setting up email sending via Inxmail Commerce

Once *Inxmail Commerce* is connected to your source system, it is normally necessary in the source system to set up the sending of transactional emails via *Inxmail Commerce*.

### Sending directly from the source system



### Sending via Inxmail Commerce



### Example

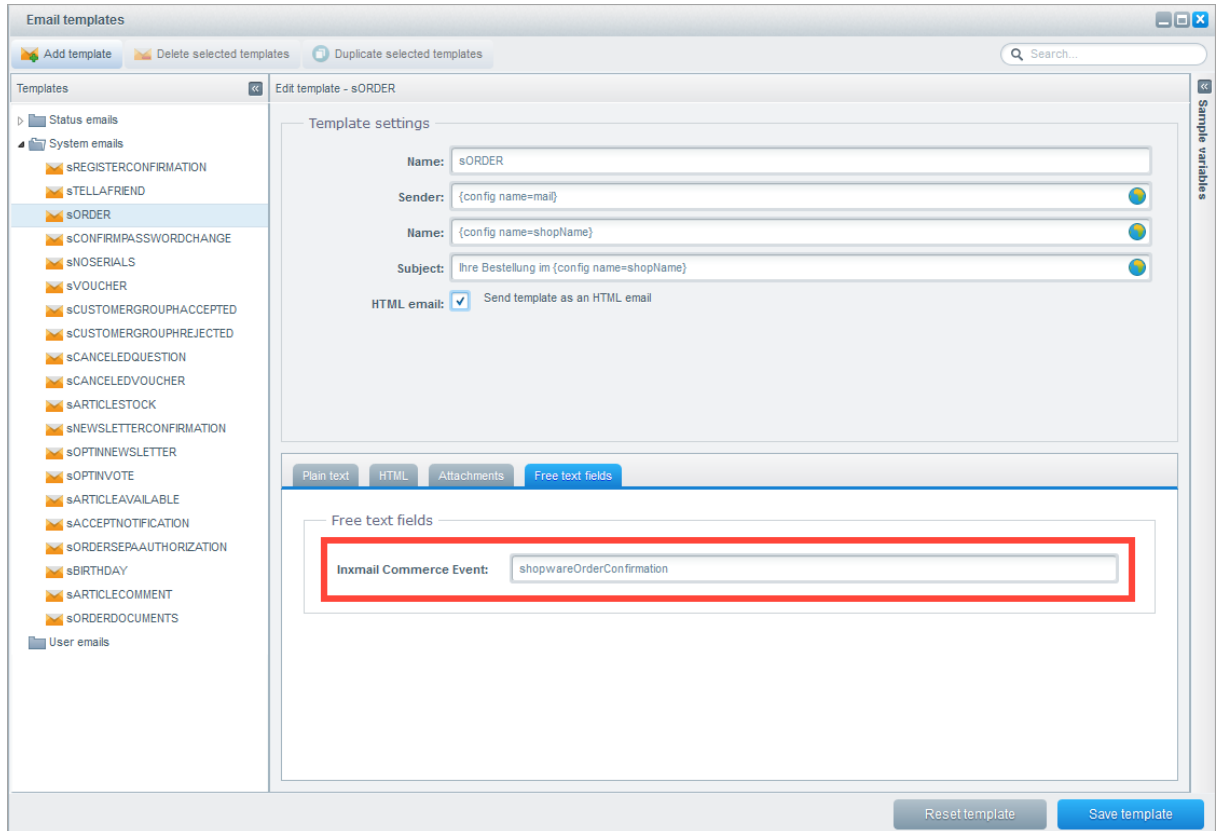
In *Shopware*, the sending of transactional emails via *Inxmail Commerce* needs to be specified for each individual mailing type.

### Step-by-step

To set up the sending of order confirmations via *Inxmail Commerce*, proceed as follows in *Shopware*:

1. Under the *Configuration* menu item, select *Email templates*.  
You will be directed to the *Email templates* window.
2. In the navigation area on the left, click *System emails > sOrder*.

- Click the *Free text fields* tab in the area on the right.



- In the *Inxmail Commerce Event* field, enter the event ID that you use in *Inxmail Commerce*. (You can assign any event ID. However, it must be exactly the same in the source system and in *Inxmail Commerce*.)

(For more information, see section *Creating an event in Inxmail Commerce* page 20.)

The effect of entering an event ID is twofold:

- As soon as a value is stored in the *Inxmail Commerce Event* field, the mailing type is automatically sent via *Inxmail Commerce*.
  - You have defined the event ID that must be stored in *Inxmail Commerce* for the corresponding mailing type or for the corresponding event.
- ✓ You have now set up the sending of order confirmations via *Inxmail Commerce*.



## PART 2

### 6 Specifying data to be transferred from the source system to Inxmail Commerce

To specify the data that you transfer from your source system to *Inxmail Commerce*, you carry out two steps.

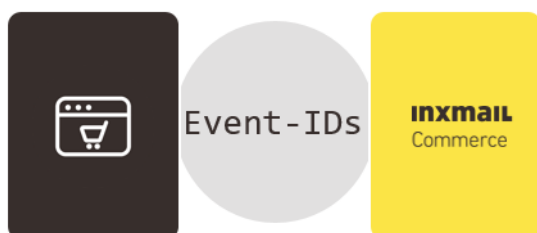
**Specify email types and events** First, you specify which transactional emails you would like to send, that is, whether you would like to send order confirmations, password changes or tickets. Usually your source system provides a range of mailing types, possibly in rudimentary form. The various transactional emails correspond to so-called events. When a customer clicks the 'Place Order' button in your online store, he/she triggers an 'order event', which in turn triggers the sending of the transactional email.

**Specify the contents of the transactional emails** In the second step, you specify which information should be available in which transactional email. Here too, you will usually find placeholders or variables in your source system that you can transfer per transactional email or per event.

#### 6.1 Specifying mailing types and events

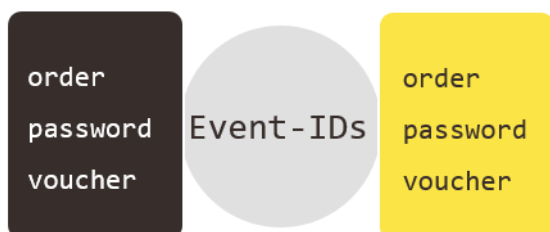
##### Events

Events or event IDs are the main link between *Inxmail Commerce* and your source system in respect of the contents of the transactional emails that you send via *Inxmail Commerce*.



For each mailing type, the same event ID must be entered in the source system and in *Inxmail Commerce*.

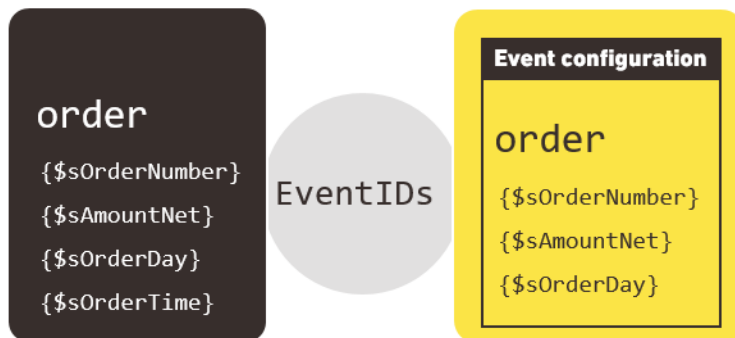
**Note** It is possible that your source system does not use the term 'event ID', but another term with a similar meaning.



## 6.2 Specifying the contents of the transactional emails

Your source system provides a range of placeholders per mailing type (and thus per event). Setting up your source system, or rather connecting it to *Inxmail Commerce*, requires you to select the information that you want to send to your customers or recipients, or else must send to them for legal reasons. As a rule, you do not need all the information from the source system for the emails to be sent via *Inxmail Commerce*. In the so-called event configuration (*Configuring events* page 17), you are able to store just the placeholders that you actually want to transfer.

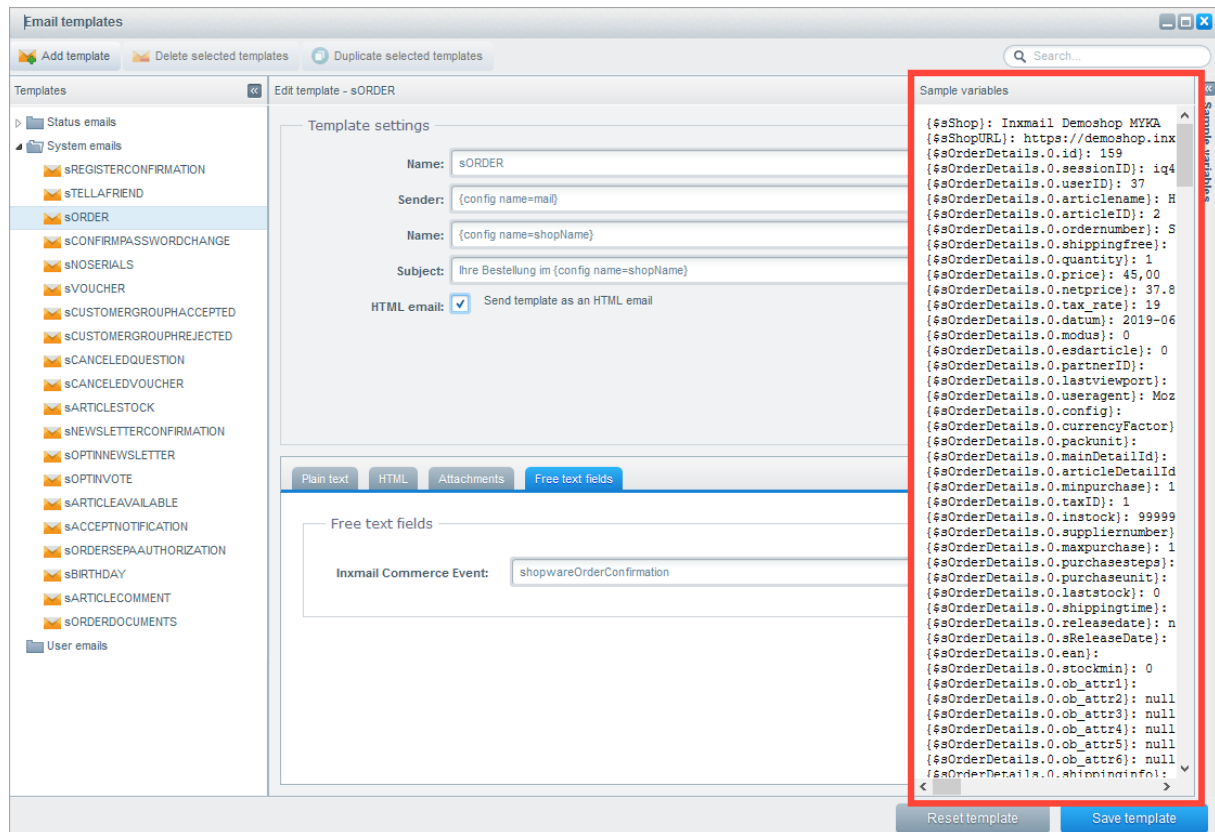
**Example** In the diagram below, the last placeholder `{sOrderTime}` was not included in the event configuration in *Inxmail Commerce*.



### Example using Shopware

An overview of all placeholders (variables) that you can use for each mailing type in *Shopware* and thus transfer to *Inxmail Commerce* can be found under *Configuration > Email templates*.

In the navigation area on the left, click the desired mailing type. Click *Sample variables* in the area on the right.



## Additional information

An overview of the email templates and variables in *Shopware* can be found in the [Shopware online documentation](#).

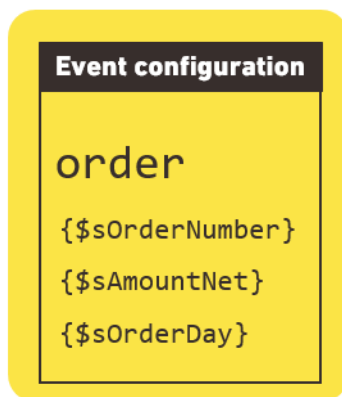
## PART 3

### 7 Specifying data received by Inxmail Commerce – configuring events

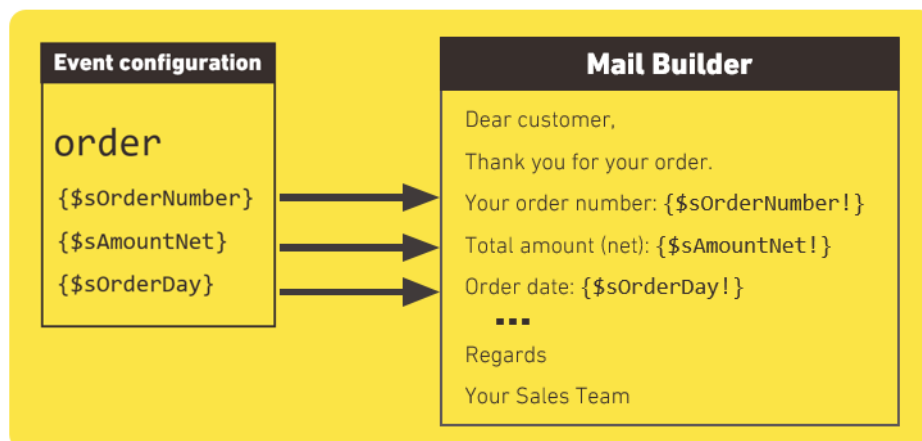
#### 7.1 Configuring events

##### Specify placeholders for Inxmail Commerce

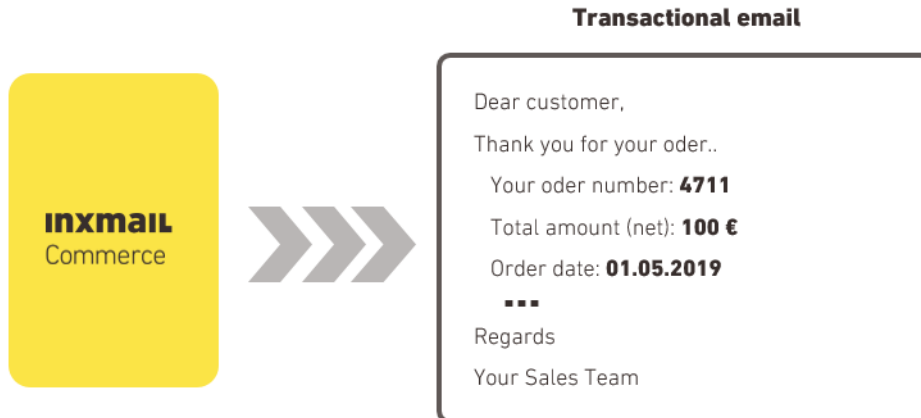
Before you can use *Inxmail Commerce* to send transactional emails, you must first specify in *Inxmail Commerce* which placeholders you would like to use from the source system. This is done in the event configuration in *Inxmail Commerce*. There, in the so-called event XML, you enter all placeholders that *Inxmail Commerce* is to receive from the source system and which you can therefore use in transactional emails.



You can insert the placeholders entered in the event XML into the transactional emails.



When the transactional email is sent, the placeholders are filled with the appropriate values.

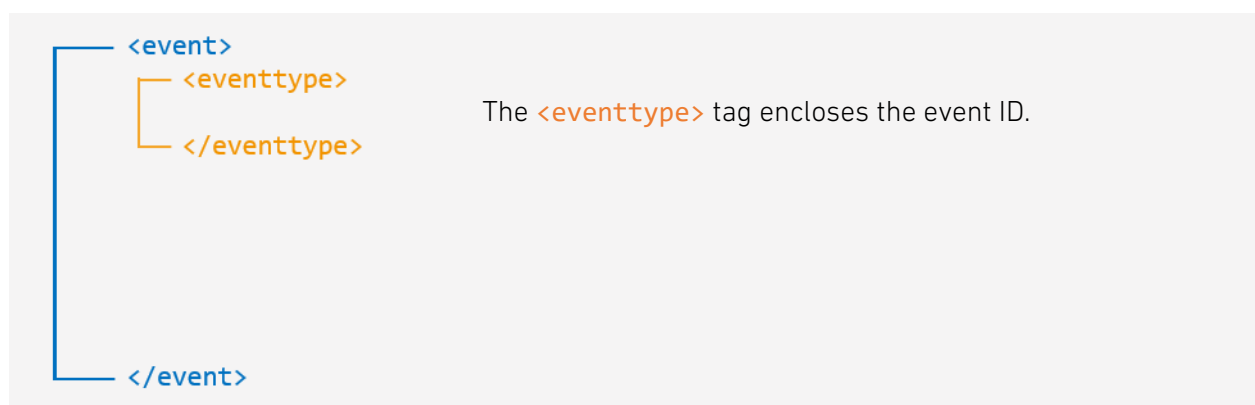


 [Ensuring correct event data](#)

## 7.2 Understanding event tags (event XML)

The event configuration is carried out using the XML markup language. The XML tags are used in a descriptive function. (The data transfer between the source system and *Inxmail Commerce* is via JSON.) Only the placeholders that you enter in the event configuration, within the corresponding XML tags, can be received by *Inxmail Commerce* and then used in the transactional emails.

There are nine XML tags in total for the event configuration. Below is an explanation of some of the main XML tags.



```

<event>
  <eventtype>
  </eventtype>

  <phgroup>
  </phgroup>
</event>

```

The **<phgroup>** tag is used to group placeholders or data. For example, you can group placeholders that relate to the customer or the product.

```

<event>
  <eventtype>
  </eventtype>

  <phgroup>
    <placeholder>
    </placeholder>
  </phgroup>
</event>

```

The **<placeholder>** tag is used to define the actual placeholders. The placeholders within **<placeholder>** tags are displayed in the placeholder drop-down lists in the Mail Builder.

```

<event...>
  <eventtype>
    <id>...</id>
  </eventtype>

  <phgroup>
    <id>...</id>
    <placeholder>
      <id>...</id>
    </placeholder>
    <placeholder>
      <id>...</id>
    </placeholder>
  </phgroup>
</event...>

```

Most tags require an **<id>** tag. The text/name within the ID tag must match the text/name in the source system.

## Example using Shopware

The example shows a simplified event configuration for an order confirmation for *Shopware*.

```

001 <event xmlns="http://www.inxmail.com/xcom/eventtype">
002   <eventtype>
003     <id>shopwareOrderConfirmation</id>
004   </eventtype>
005   <phgroup>
006     <id>Data</id>
007     <placeholder>
008       <id>SOrderNumber</id>
009     </placeholder>
010     <placeholder>
011       <id>SAmountNet</id>
012     </placeholder>
013     <placeholder>
014       <id>SOrderDay</id>
015     </placeholder>
016   </phgroup>
017 </event...>

```

## Further tags

Other possible tags not shown in this example relate to the language and data type. Therefore, the **Integer** data type would normally be specified for the *SOrderNumber* placeholder, the **DateTime** data type for the *SOrderDay* placeholder.

Another main tag often used for order and shipping confirmations is **<phlist>**. Placeholders within a **<phlist>** tag are displayed as a list within the transactional email. This tag relates specifically to the *Article list* module in mailings (*Creating a mailing – adding modules* page 28).



[Structure and content of the event XML](#)

[Event XML – Overview of all XML tags](#)

[Event XML example file](#)

## Event templates in Inxmail Commerce

For some source systems, templates for standard events are available in *Inxmail Commerce*, so that you do not have to create the event XML yourself. Here you may only need to modify the corresponding event XML according to your needs.

## 7.3 Creating an event in Inxmail Commerce

**Note** The following step-by-step instructions describe how to create an event without using a template. For some source systems, templates for standard events are available in *Inxmail Commerce*, so that you do not have to create the event XML yourself.

## Step-by-step

Proceed as follows to create a new event that is not based on a template:

1. Select the **Events** menu item in the Navigation bar.  
Events that have already been created are displayed in the Selection bar.
2. Click **+ Create new Event** at the bottom end of the selection bar.

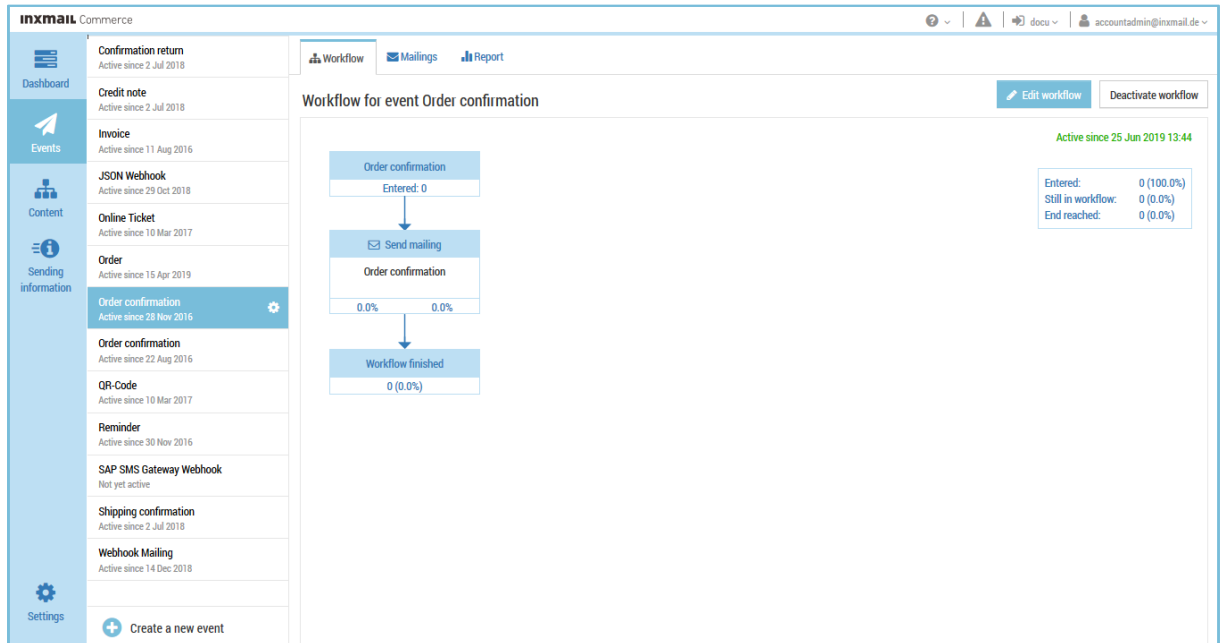


Fig. 1: Creating a new event

You will be directed to the page to select various default event templates.

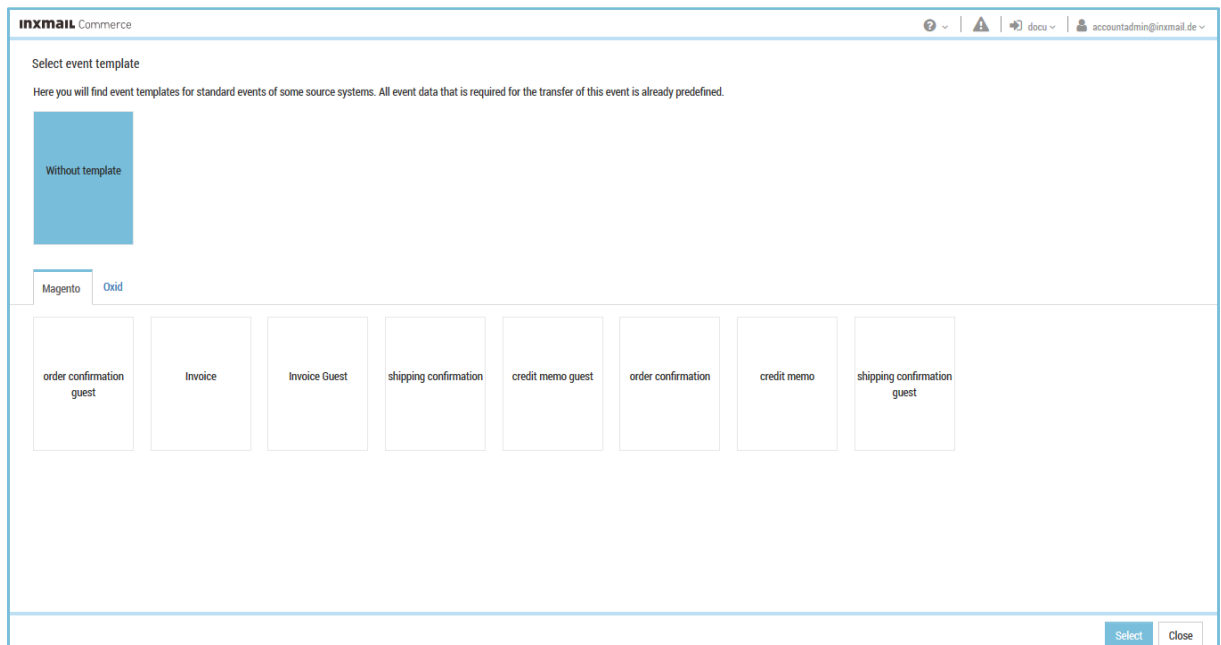


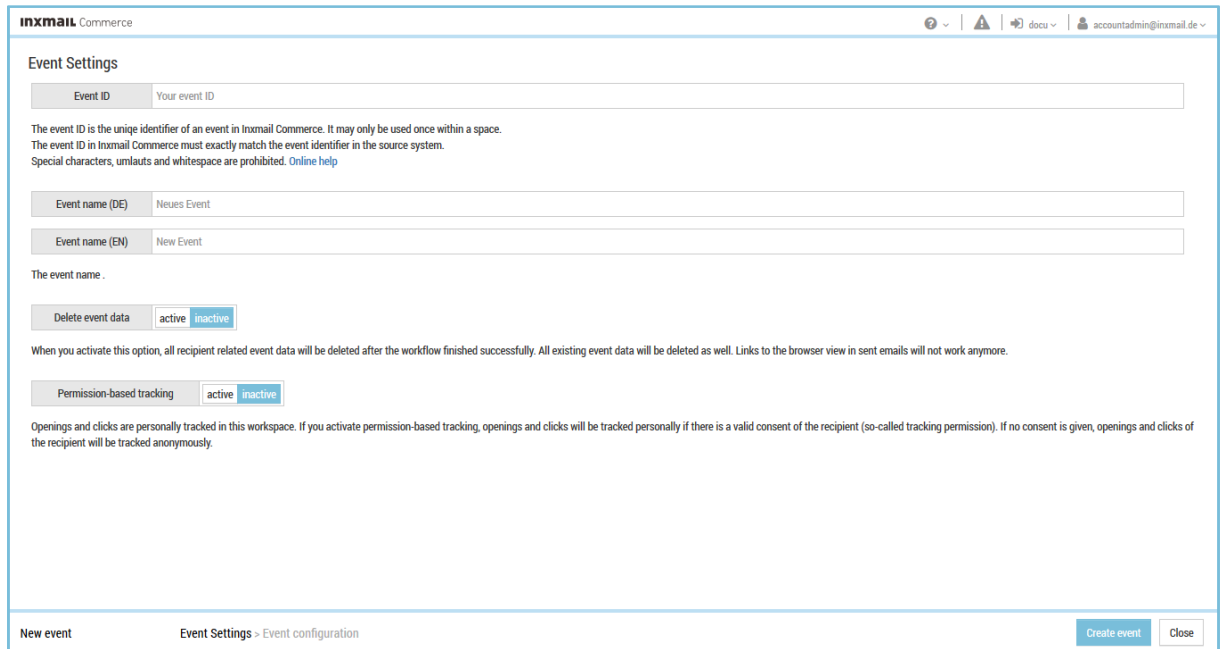
Fig. 2: Selecting a default event template

3. Select **Without template**.



4. Click **Select**.

You will be directed to the *Event settings* page.



**Event Settings**

Event ID

The event ID is the unique identifier of an event in Inxmail Commerce. It may only be used once within a space. The event ID in Inxmail Commerce must exactly match the event identifier in the source system. Special characters, umlauts and whitespace are prohibited. [Online help](#)

Event name (DE)

Event name (EN)

The event name .

Delete event data ☒ active ☐ inactive

When you activate this option, all recipient related event data will be deleted after the workflow finished successfully. All existing event data will be deleted as well. Links to the browser view in sent emails will not work anymore.

Permission-based tracking ☒ active ☐ inactive

Openings and clicks are personally tracked in this workspace. If you activate permission-based tracking, openings and clicks will be tracked personally if there is a valid consent of the recipient (so-called tracking permission). If no consent is given, openings and clicks of the recipient will be tracked anonymously.

New event      Event Settings > Event configuration      [Create event](#) [Close](#)

Fig. 3: Event settings

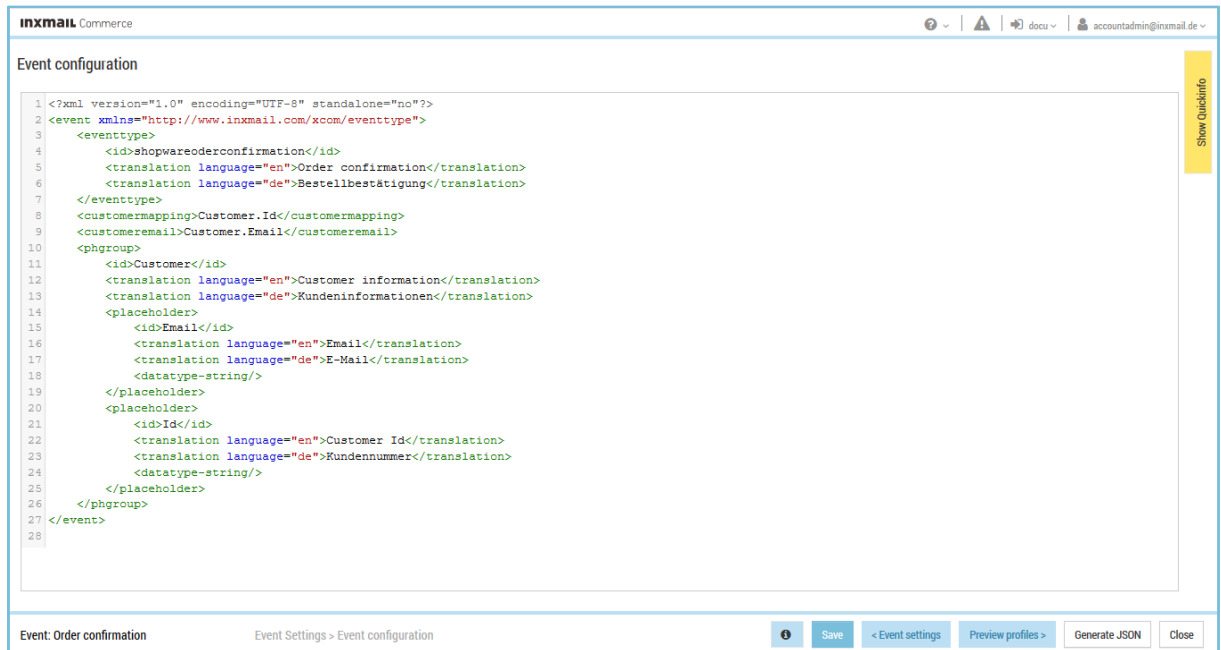
Name	Description
Event ID	<p>Enter the event ID here.</p> <p>The event ID uniquely identifies an event in <i>Inxmail Commerce</i>. It may only be used once for each workspace.</p> <p>The event ID in <i>Inxmail Commerce</i> and the name of the associated event in your source system must match exactly.</p>
Event name (DE)	<p>Enter the German event name here. The event name can be freely assigned. Descriptive names such as 'Reminder' or 'Reset password' are recommended. The event name is displayed in the event overview (selection bar) once the event has been created.</p>
Event name (EN)	<p>Enter the English event name here.</p>
Delete event data	<p>You can specify here whether the event data transferred from your source system should be automatically deleted after successful completion of the workflow. (A workflow has usually been completed successfully once the transactional email has been sent without any problems.)</p> <p>If you select this option, event records from any earlier dispatches will also be deleted. The event data is deleted approximately 24 hours after the workflow has been completed. The link to the Web view or browser view in the transactional email is also no longer active after this period of time.</p>

- Specify your settings in the fields.

**Note** The entries made for the event ID and event name are transferred to the event XML. They can be changed both in the event settings and in the event XML.

- Click **Create event**.

You will be directed to the page for editing the event template (event XML).



*Fig. 4: Configuring a default event template*

- Adjust the event template, if necessary.
  - Click **Save**.
- ✓ You have now created a new event.

## Additional information

When you start *Inxmail Commerce* for the first time or begin to set it up, you can use the *Dashboard* menu item or the *Events* menu item to create a new event. For this purpose, the *Create a new event* button is displayed in the display section.

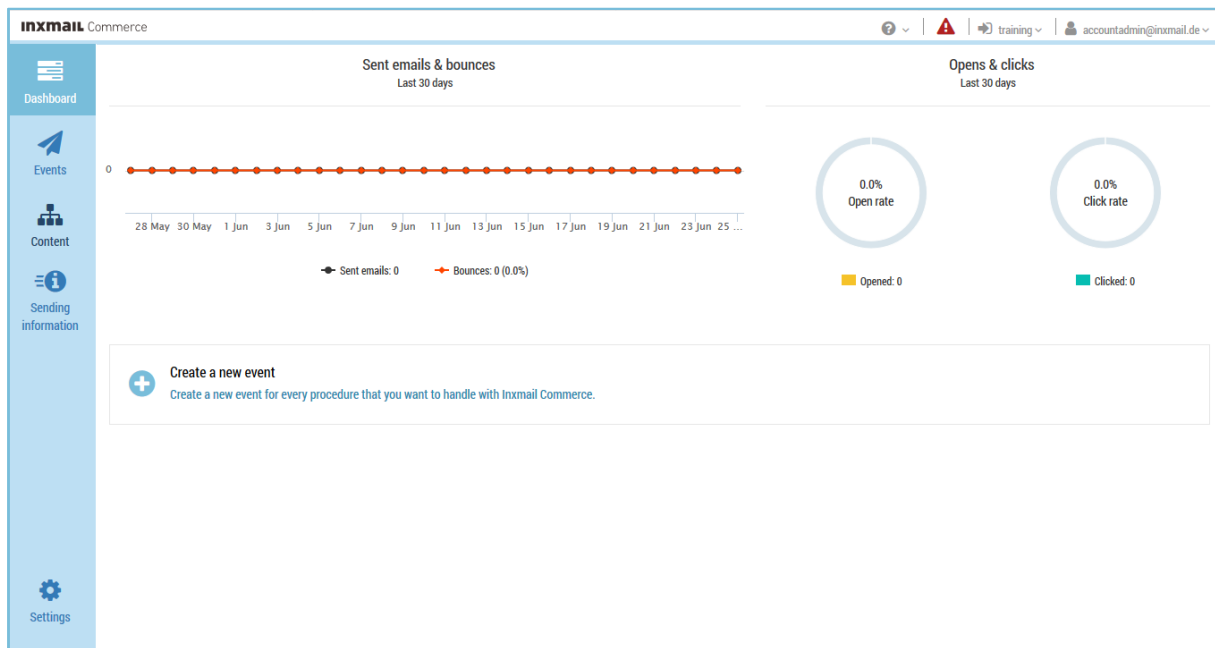



Fig. 5: Creating a new event

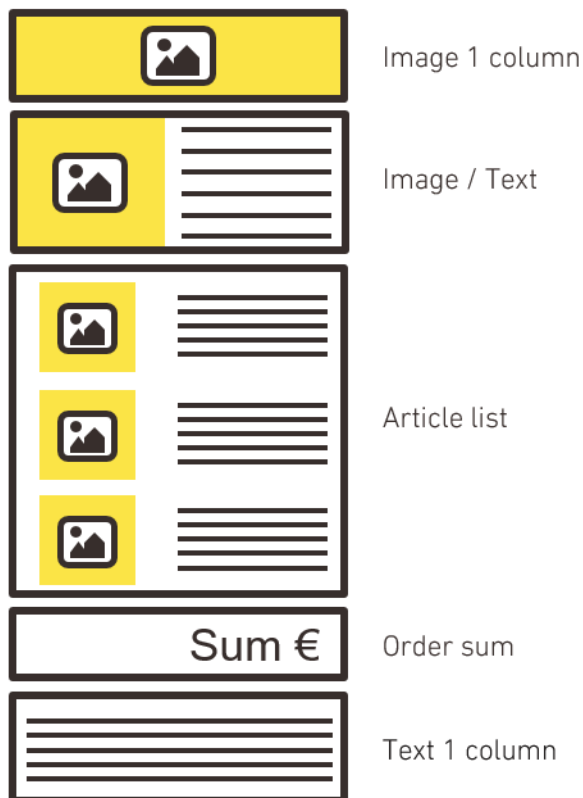
-  [Creating a new event based on an event template](#)
- [Configuring an event](#)

## PART 4

### 8 Creating mailings in Inxmail Commerce

#### 8.1 Mailings consist of modules

The mailings that you create with the *Mail Builder* are structured using a modular principle. At the highest level, they consist of modules. The mailing sketched here consists of the modules *One-column image*, *Image/text*, *Article list* and *One-column text*.



Some modules remain unchanged whenever you send a mailing. These are usually the 'frame modules' at the beginning and end of the mailing (for example, a header or banner image at the top and the imprint at the bottom). So if you have designed the frame elements or inserted them into the mailing, you will seldom need to change them.

The *Article list* module plays an important role. It behaves dynamically by automatically determining the ordered articles (in an order confirmation) and listing them together with the price and other desired information. The *Article list* module only has to be inserted once. The content is updated dynamically.

Another main module is the *Order amount*. Inserted once, it automatically determines the total of the article prices listed in the article list.

Before you start creating your mailings, it is a good idea to think about the layout and the content you want to integrate into your mailing. The overview of the standard modules provided by *Inxmail Commerce* will help you:

 [Overview of standard modules](#)

**Note** We can create custom modules specially tailored to your requirements, if desired. For more information, contact your Inxmail contact person or send an email to: Care-Consulting@inxmail.de.

## Your next steps

To create a mailing, three main steps are required.

1. First of all, you have to make the basic settings for the mailing. These include the name of the mailing and the sender address.
2. In the next step, you determine the layout by adding the desired modules to the mailing. To a certain extent, you already decide on the content of your mailing, for example by inserting an article list.
3. The last step concerns further contents of your mailing. On the one hand, there is static content, such as your logo or the imprint. On the other hand, there is dynamic content, which is integrated into the mailing primarily through the insertion of placeholders and which is different for each recipient.

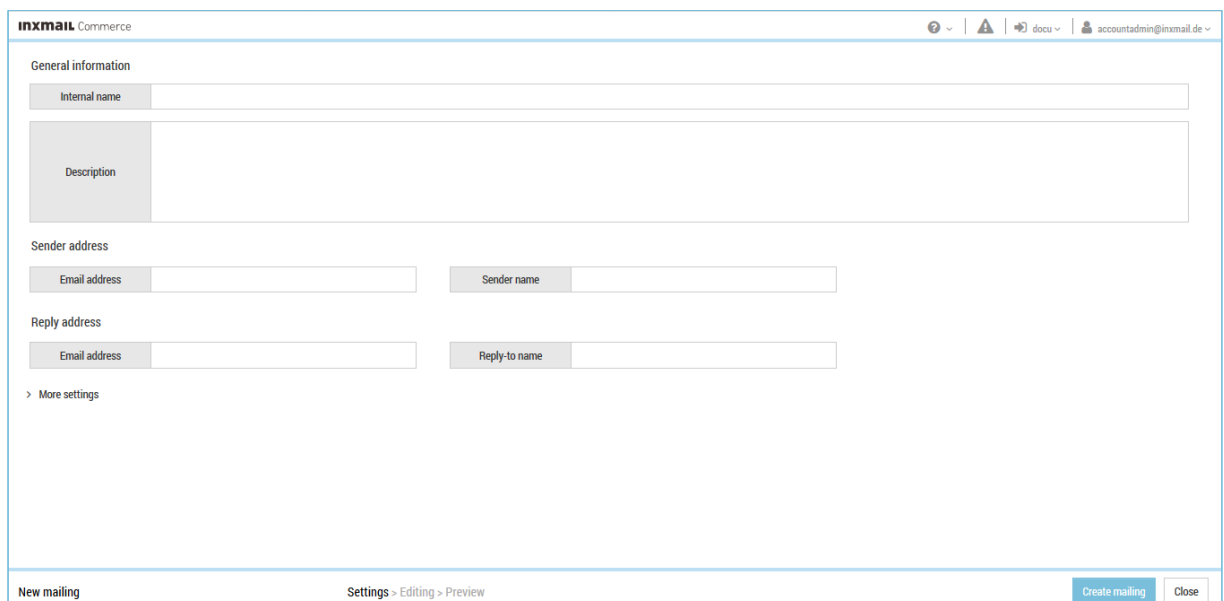
## 8.2 Creating a mailing – settings

### Step-by-step

To create a new mailing with the *Mail Builder*, proceed as follows:

1. Select the **Events** menu item in the Navigation bar.  
Events that have already been created are displayed in the Selection bar.
2. Select the event for which you would like to create a Mailing.
3. Switch to the *Mailings* tab.
4. Click **New mailing**.  
You will be directed to the page to select the editor.
5. Click the *Mail Builder* tile.
6. Click **Select**.

You will be directed to the page for creating a new mailing in the *Settings* workflow step.



The screenshot displays the 'New mailing' settings page in the Inxmail Commerce interface. The page is titled 'inxmail Commerce' and shows a user profile 'accountadmin@inxmail.de'. The main content area is divided into sections for 'General information', 'Sender address', and 'Reply address'. Each section contains input fields for specific details. A 'More settings' link is available below the 'Reply address' section. The bottom of the page features a breadcrumb trail 'Settings > Editing > Preview' and two buttons: 'Create mailing' and 'Close'.

Fig. 6: Creating a new mailing

Name	Description
General information	
Internal name	Enter an internal name for the mailing. The internal name is displayed in the details section on the <i>Mailings</i> tab. You can use the internal name to analyse your mailings on the <i>Report</i> tab. The internal name is not displayed in the sent mailings.
Description	Enter a description of the mailing (for internal use). The description allows you to enter detailed information on the mailing for yourself and others. You might want to specify the intended purpose of the mailing, for example.
Sender address	
Email address	Enter the sender's email address.
Sender name	Enter the name of the sender.
Reply address	
Email address	Enter the sender's reply email address. It is displayed in the recipient's email client when the recipient replies to the mailing.
Reply-to name	Enter the sender's reply-to name. It is displayed in the recipient's email client when the recipient replies to the mailing.
More settings	
Track openings	Use this option to specify whether <i>Inxmail Commerce</i> should track the recipient's opening of the sent (transactional) email. In the standard settings, this option is active.  The opening of an email is tracked by automatically inserting a tracking pixel in the email. <i>Inxmail Commerce</i> determines that the email has been opened as a result of the tracking pixel or images linked in the email being loaded in the recipient's email program.  To ensure that the opening can be tracked, the recipient should therefore not have suppressed the display of images in their email program.
Localisation	Here you can specify regional settings for the mailing if they are to differ from the default settings in your workspace. Regional settings are relevant in connection with date and number formats. <b>Example</b> Switzerland 1'000.00 Germany 1.000,00 <b>Note</b> If you select the Use the default setting value, the language or regional setting from your workspace will be used.

- Specify your settings in the fields.

8. Click [Create mailing](#).

You will be directed to the *Mail Builder*.

- ✓ You have now created a new mailing with the *Mail Builder*.

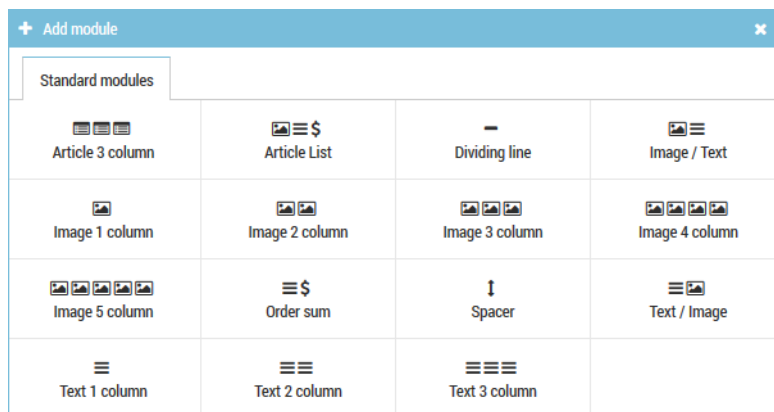
 [Creating a mailing – ‘Settings’](#)

## 8.3 Creating a mailing – adding modules

### Step-by-step

To insert a standard module into a mailing, proceed as follows:

1. Open the mailing in the *Mail Builder*.
2. Click the *Insert new module* button.
3. The *Add module* dialog box is displayed.



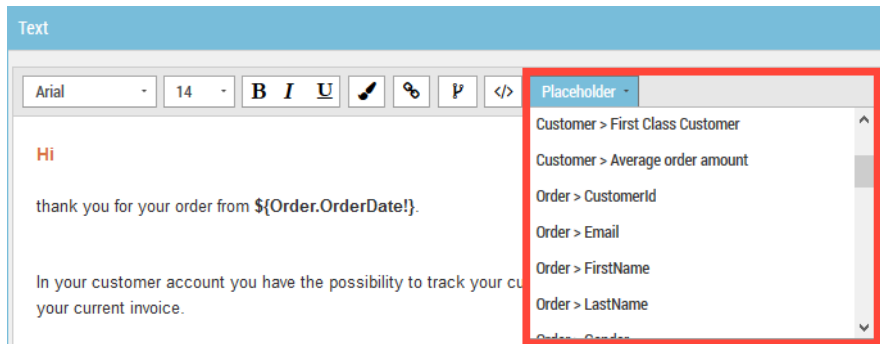
4. Click the module that you would like to insert into the mailing.
5. You return to the mailing editor.
- ✓ You have inserted a standard module into a mailing.

 [Working with modules](#)

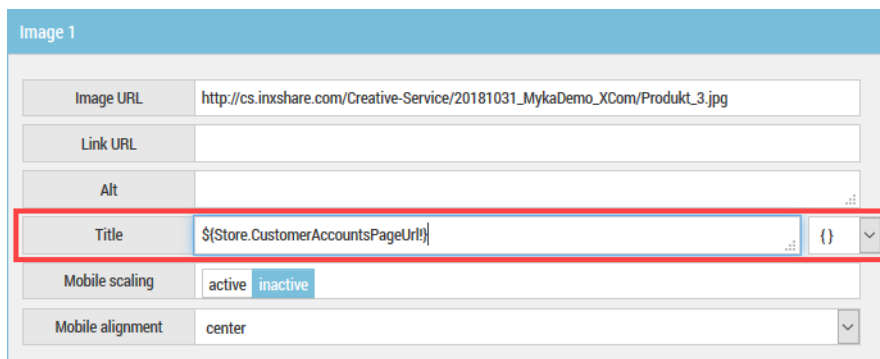
## 8.4 Creating a mailing – inserting placeholders

You can insert placeholders into mailings using the drop-down menu. The drop-down menus are available in the individual modules.

The screenshot shows the placeholder drop-down menu in the text element of a module.



In the case of some modules/elements, it is first necessary to click the respective element or the respective property in order for the placeholder drop-down menu to be displayed. This is the case for the Image element.



 [Inserting placeholders](#)



## PART 5

### 9 Setting up workflows in Inxmail Commerce

Transactional emails must be integrated into a workflow before they can be sent by *Inxmail Commerce*. At the same time, the workflow offers plenty of ways to control the sending of emails, especially if you are integrating multiple mailings into a workflow. In addition, the most important key figures for the sending of emails are displayed in the workflow.

#### Controlling the sending time

You can use the *Wait* element to specify that follow-up emails are sent after a certain time period, for example.

**Example** If the recipient has ordered shoes, you can set the workflow so that a follow-up email with information on shoe care products is sent one month after the shoes have been purchased.

 [Controlling the sending time](#)

#### Making sending conditional

You can use the *Apply filter* element to link the sending of a mailing to conditions.

**Example** If the order value is greater than EUR 500, a coupon for the next purchase will be integrated into the order confirmation.

 [Defining target groups on the basis of event data](#)

You can use the *Mailing opened* element to control the sending of an email so that recipients will only receive it if they have opened another email or have not opened it.

**Example** If a recipient has not opened an invoice within a certain time period, he/she will receive a reminder email.

 [Defining target groups for mailings](#)

## 9.1 Use case – Various mailings for German and English recipients

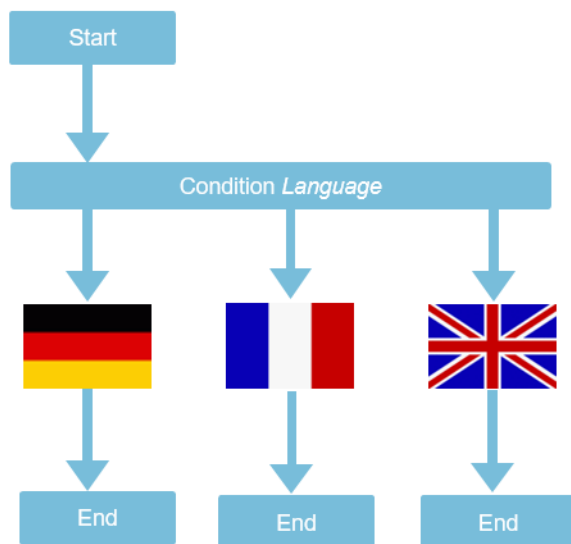
The possibility to set conditions in a workflow is of particular relevance when using Inxmail Commerce in an international environment.

### Initial situation

You operate an online shop within Europe. Your customers are located predominantly in German, English and French-speaking countries. You would like to send the transactional emails in the language of your customers.

### Solution in Inxmail Commerce

Create mailings in the respective national languages. Create a workflow in which the language of the respective recipient is queried. Set up the workflow so that German, French and English recipients (automatically) receive the mailing in their own language.



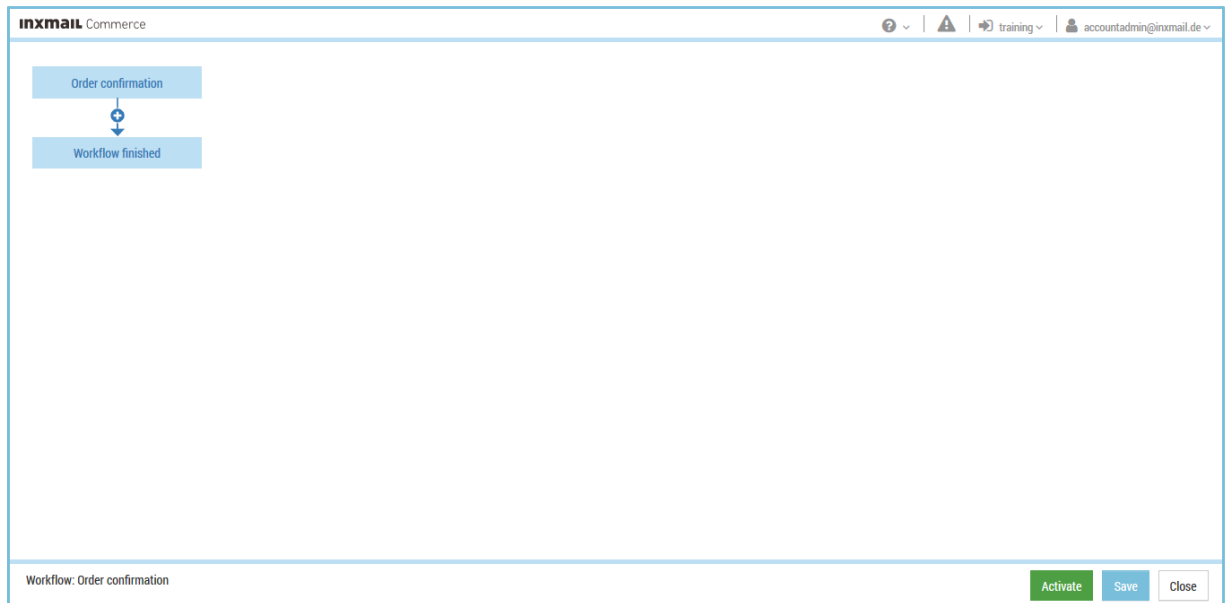
## 9.2 Integrating a mailing into a workflow

### Step-by-step

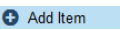
Proceed as follows to integrate a mailing into a workflow and thereby activate the sending of the mailing:

1. In the Selection bar, click the event in whose workflow you would like to integrate a mailing.  
The start and end points of the workflow are displayed.
2. Click [Edit workflow](#).

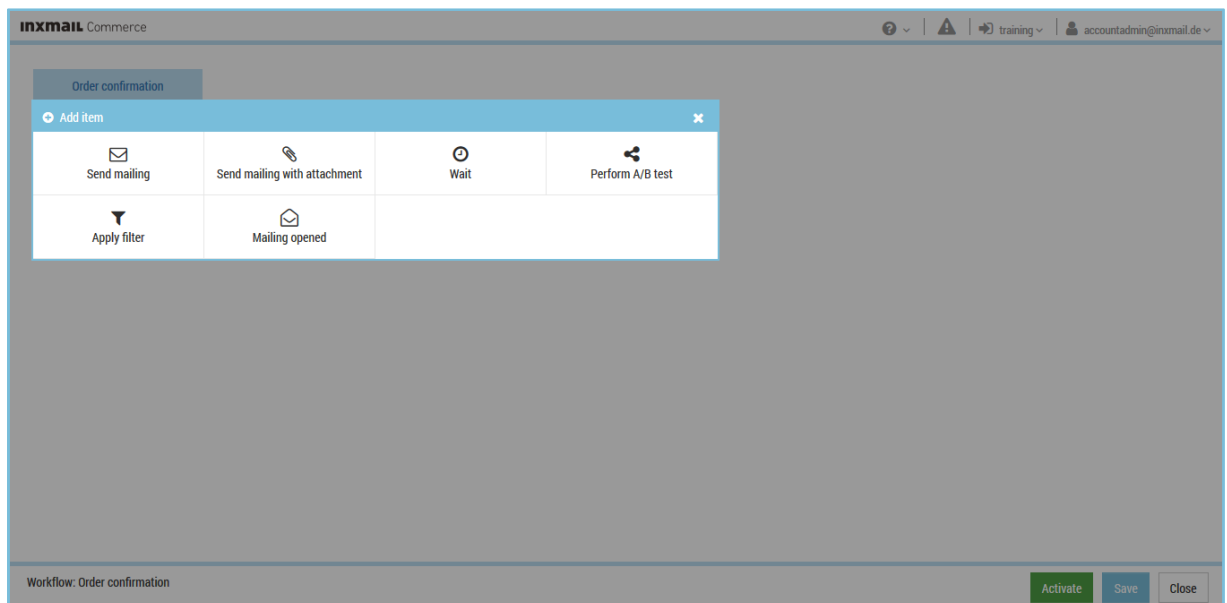
You will be directed to the Workflow editor.



*Fig. 7: Adding items to a workflow – initial situation*

3. Click the connecting arrow between the start and end points of the workflow.  
(As soon as you move your mouse pointer over the connecting arrow, the  button is displayed.)

The *Add item* dialog box is displayed.



*Fig. 8: Selecting an action for the workflow*

4. Select the *Send mailing* or *Send mailing with attachment* element type.

The *Send mailing* or *Send mailing with attachment* dialog box is displayed.

**Note** All of the mailings of the corresponding event will be displayed in both the *Send mailing* dialog box and the *Send mailing with attachment* dialog box.

Select the *Send mailing with attachment* element type if attachments for the mailing will be made available in the source system for the corresponding event. This may be the case for invoices and vouchers, for example.

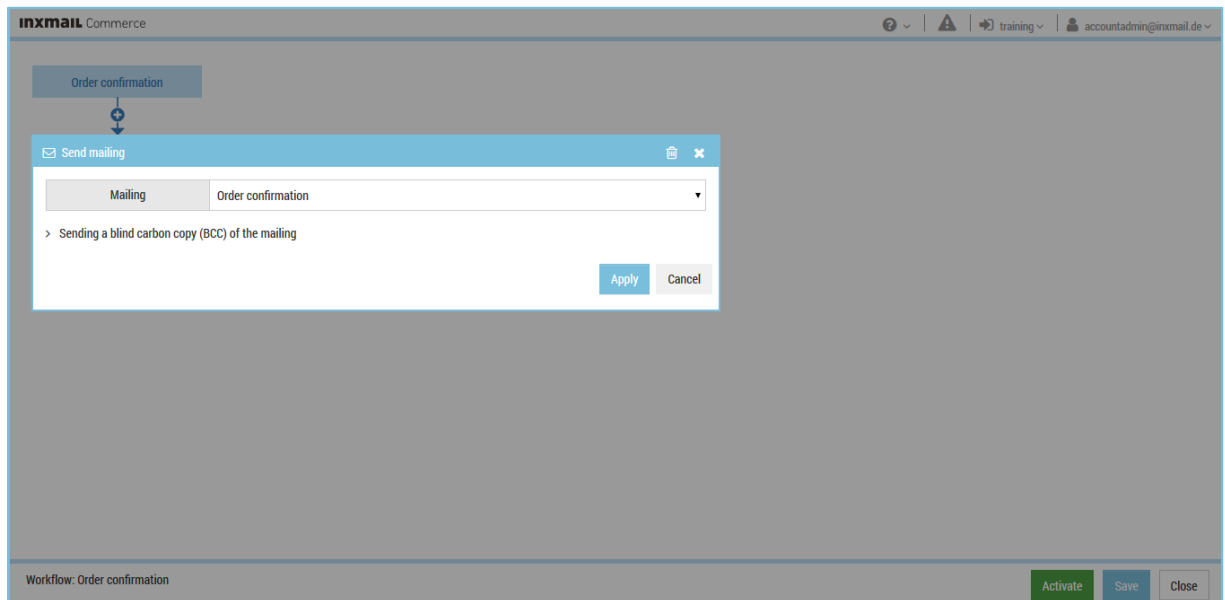


Fig. 9: Selecting a mailing for the workflow

5. Select the desired mailing.  
You return to the Workflow editor.  
The selected mailing is displayed as a component of the workflow.
6. Click **Activate**.

A confirmation dialog box appears.

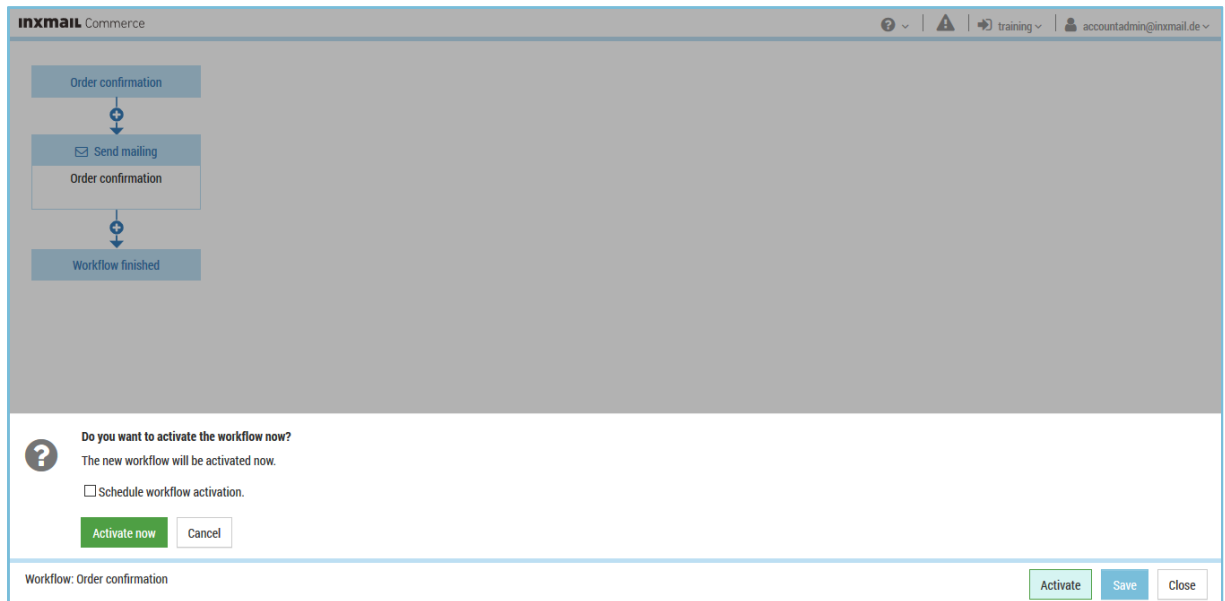


Fig. 10: Activating the workflow

7. Click **Activate now**.

(You can also activate the workflow at a scheduled time. For more information, see the [Activating the workflow](#) section.)

You return to the *Workflow* tab.

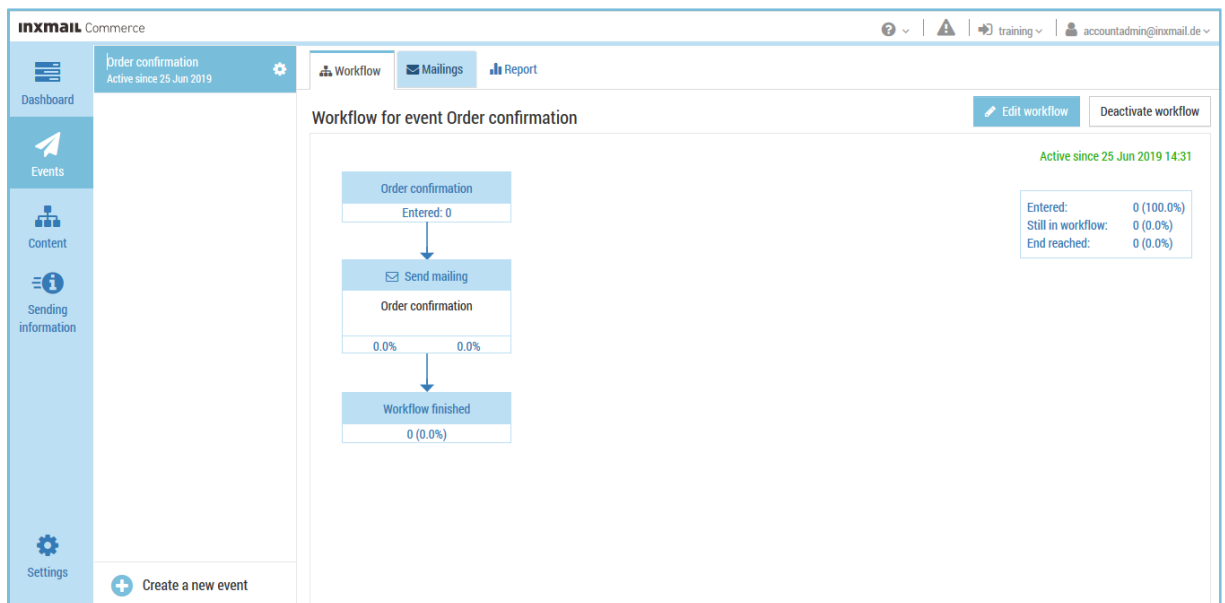


Fig. 11: Extended and activated workflow

- ✓ You have integrated a mailing into a workflow and activated the sending of the mailing.



[Integrating a mailing in the workflow – Activating the sending of mailings](#)

[Using the workflow editor](#)

## **About Inxmail**

The email marketing specialist Inxmail is renowned for high-performance software solutions and outstanding services covering everything from advice to implementation. Over 2,000 customers worldwide use Inxmail to produce custom newsletters, automated mailing campaigns and transaction emails. They know they can rely on reliable email delivery and that their data will remain secure. Interfaces can be used to connect the software to a range of specialist systems, including CRM, online shop and campaign management tools.

As a best-of-breed provider, Inxmail maintains close relationships with a range of agencies and technology providers. The email marketing specialist works hand in hand with these partners to deliver complex requirements such as connections to third-party systems and marketing automation. Inxmail was founded as an owner-operated company in 1999. Since then it has focused on providing outstanding service and individual advice – it has already won a number of awards for its close relationships with its customers. This approach has helped the email marketing provider win business from a number of international organisations, including CreditPlus, s.Oliver, Heise Media, Evonik and FC Cologne.

Inxmail believes in strong data protection in email marketing and is committed to protecting your rights. The company's servers are hosted exclusively in Germany and meet the most stringent data protection requirements. As a founder member of the Certified Senders Alliance (CSA) Inxmail has been committed to permission-based email marketing from the start.

For more information, visit: [www.inxmail.com](http://www.inxmail.com).

## **Contact**

Inxmail GmbH | Wentzingerstr. 17 | 79106 Freiburg | Germany  
T + 49 761 296979-800 | F + 49 761 296979-9  
[contact@inxmail.de](mailto:contact@inxmail.de) | [www.inxmail.com](http://www.inxmail.com)