

Personalized Emails

Send personalized emails
directly from Personyze.



PERSONYZE

Why use personalized emails?

Read more details on [how to execute an email campaign here](#)

Note: Email broadcasting requires a paid account, not available with the free trial

EASY SETUP

Setting up Personyze to send from your own email address is easy, there's a simple email verification, and then you're ready to go.

RICH FEATURE SET

Personyze email broadcasting includes:

- Email drip/workflow functionality
- Wide variety of email algorithms
 - Products like those you viewed
 - Accessories to your recent purchase
 - Newest from your favorite topic/author
 - Most popular this week
- Dynamic variables like first name, account info, company name, etc.

REAL-TIME RECOMMENDATIONS

Each visitor sees the recommendation that's most relevant for them based on their most recent product or content interactions.

Personalized email setup process

Note: Personyze must first be activated on your site. Installing Personyze involves a 5-minute or less copy/paste of our tag to your tag manager, and requires no dev work. [Read how to do so here.](#)

STEP 1

Set Recipients & Triggers

STEP 2

Content and Design

STEP 3

Timing Settings & QA



PRODUCT/CONTENT FEED

For any recommendations to work, you'll need to have your feed uploaded/synced. This will usually be a part of your onboarding.
[Read more here](#)



INTERACTIONS TRACKING

Personyze needs to be tracking the interactions that users are having with your products/content. This is standard onboarding setup.
[Read more here](#)



USER DATA

This is only relevant if you plan to filter your algorithms with CRM data. For instance, "Show most popular among users with CRM variable X."
[Read more here](#)

Recommendation Preliminaries

All these preliminary elements are standard onboarding, one-time setups usually handled by your account manager.

Step 1: Set Recipients, User List

User Base

Target

Content

QA

Performance

Email Base

Here you can review your account's user email database, and users and their email can be selected from this existing database, added from a file or user feed upload, added by API, collected via Personyze forms, or collected by setting Personyze to grab users' emails from the site as they browse (such as from a login field).

When you upload users to Personyze and don't collect their email from the site, rules such as "Last time visited the site" will not apply to them, until they have visited the site.

Upload file or set RSS/Atom Feed

✔ There are 166163 users in your database.

« 1 2 3 4 »

Filters

Show columns

Export

Import

Use API

User ID		Session counter	Last session time	Data last modified	Current city	Current state	Current country	company
<div><div></div><div>2082407808</div></div>	<div><div>View Profile</div><div>User lists</div><div>Interests</div><div>Product Interactions</div><div>Article Interactions</div><div>Delete user</div></div>	1	May 24, 21 12:20 PM	May 24, 21 2:11 PM	San Ramon	CA	United States	

Import options

Total users on your account, use this to create filters, for example show only email = not empty, to see only users whose emails you have.

Step 1: Set Recipients, Targeting

Personyze emails can be sent to a user list, or visitors you choose through targeting.

The screenshot displays the 'Email Targeting' configuration interface. At the top, a navigation bar includes 'User Base', 'Target' (active), 'Content', 'QA', and 'Performance'. The main area is divided into two sections: 'User Profile Data' and 'Product interactions', both with '+ Add' buttons. Under 'User Profile Data', the rule 'User: Subscriber Contains YES' is selected. Under 'Product interactions', the rule 'Purchased Any product Distinct products ≥ greater than or equal to 1 < less than 10 days' is selected. A central black callout box with an arrow pointing to the 'AND' connector states: 'Set who this email campaign is targeting, you can use different rules such as CRM data or last product interaction, etc.' On the right, a blue sidebar contains three sections: 'Changes not saved yet:' (listing actions like 'Update audience', 'Create actiongroup: Rotation group A', etc.), 'Your campaign is targeting' (summarizing the selected rules), and 'Rotation among 3 actiongroups:' (describing the distribution of actions across groups).

User Base ► Target ► Content ► QA ► Performance

Email Targeting

User Profile Data + Add ^

Include

User: Subscriber Contains YES x

User List (profile data) + Add v

Days till birthday + Add v

AND ◀ ▶ ✕

Product interactions + Add ^

Include

Purchased Any product Distinct products ≥ greater than or equal to 1 < less than 10 days x

Last product interaction + Add v

Number of items in cart v

Cart value v

Number of products purchased v

Products purchased value v

Changes not saved yet:

- Update audience
- Create actiongroup: Rotation group A
- Add action Forgotten Cart Email (after 2H) - Returning Visitor to group Rotation group A
- Create actiongroup: Rotation group B
- Add action (untitled) to group Rotation group B
- Delete action Forgotten Cart Email (after 2H) - Returning Visitor from group Always shown

Your campaign is targeting

Include User: Subscriber Contains YES
and
Include Purchased Any product Distinct products ≥ greater than or equal to 1 < less than 10 days

Rotation among 3 actiongroups:

Always shown (no actions), Rotation group A (50% of users, 1 actions), Rotation group B (50% of users, 1 actions)

Please, set time frames and limits for this email. While a user matches the audience, this email can be sent to him once or several times.

Email send trigger

What should trigger sending emails to users that match campaign rules.



Campaign rules
match



After site visit



Cart abandonment



After purchased



On form submit

How long to wait after email triggered ▾

The user can actually receive the email with delay of up to 1 hour.

Wait after the trigger triggers

000 days 02 hr



✓ Mon

✓ Tue

✓ Wed

✓ Thu

✓ Fri

✓ Sat

✓ Sun



Send more than once to each user ^

Max send times to a given user

3

Send not more frequently than this period

7

days

Set triggers, such as to send an email after a purchase, which will mean the user will only be part of the campaign and receive an email once they've made a purchase. If you use other targeting rules, they may also have to be part of another segment.

Step 1: Triggers

Emails are typically triggered in 3 ways:

- Site visited
- Cart abandoned
- Form submitted

For example, in e-commerce, you can show them a popup offering to send them their cart, the items they recently viewed, or a coupon code, and the email will send immediately after they submit the form.

Step 1: Sender Settings

Here you have various settings for how email should be sent, from which address, etc.

✉ **New action: Products recommendation by email**

> 1 Recommendation type > 2 Sender settings > 3 Email look > 4 URL parameters

You can send using Personyze server, or you can use different Mail S... with the SMTP protocol.

Send using

+ Add new mail or webhook provider ▼

☒ Use Personyze mail server ☐ Mail provider (SMTP) ☐ Webhook (HTTP POST)

"From" email address

Save

Cancel

Subject

Broadcast service: from which email address or provider this campaign is going to be sent?

Step 2: Choose a Widget

Next, you'll be directed to select one of a few different types of email campaigns. The webhook option is for triggering emails in a third party platform, by sending a webhook.

Campaign description

User Base ▶ Target ▶ **Content** ▶ QA Performance

Set the email that will be sent to the campaign's target audience. You can choose to send a single email, or more emails to send in a drip, and in the email set up, you can choose to send the campaign, and then sends emails.

Es alone, or include dynamic recommendations (if you are set up for product recommendations alone, or if the visitor visits the site before that. Personalize checks every 30 minutes,

Emails that include dynamic recommendations, such as "Recommended for you based on other users like you" or "Items left in your cart," etc.

Products recommendation by email

Webhook

Dynamic email/Remarketing email

In this content widget, you set the email content with no dynamic recommendations. You can still use dynamic variables, such as account values, first or last name, etc.

Recommendation by email

< 1

> 2 Sender settings

> 3 Email look

> 4 URL parameters

> 5 Timing

should be recommended.

Recommendation algorithm type

Buy it Again Recommendations

Recommend products that the visitor bought in the past. Present most

Recently interacted

Up-Sell

Increase your profit margins by recommending higher priced products but similar to last bought product. You need to set "Upsale category" in the products catalog to "Category" of another product. Present the most

Viewed

Recently

Those Who Bought This Also Bought

Items bought by visitors who boughts one or more of the items bought by the visitor. Prefer most

recommended

 Recommend

any

Last Bought Item: Those Who Bought This Also Bought

Items bought by visitors who boughts the last item bought by the current visitor. Prefer most

transactions

Require at least

4

 transactions Recommend

any

Select the algorithm that makes the most sense, for instance here we ask to recommend items that were frequently bought together by other users who bought the same item as the one most recently viewed, or currently viewing.

How many items should be shown, whether to fill empty cells with default items, and fallback recommendations if we don't have enough data.

☐ Number of cells

Maximum recommendations to show:

3

☐

 Fill empty cells with default selection

to exclude unwanted products.

urrent page ⓘ

ⓘ

Step 2: Algorithm

If you selected an email with recommendations, Personyze has algorithms for both products and content

Some popular email algorithms include:

- Products like those you recently viewed
- Accessories to your recent purchase
- New content from your favorite topic
- Most popular content this week
- New from your favorite writers

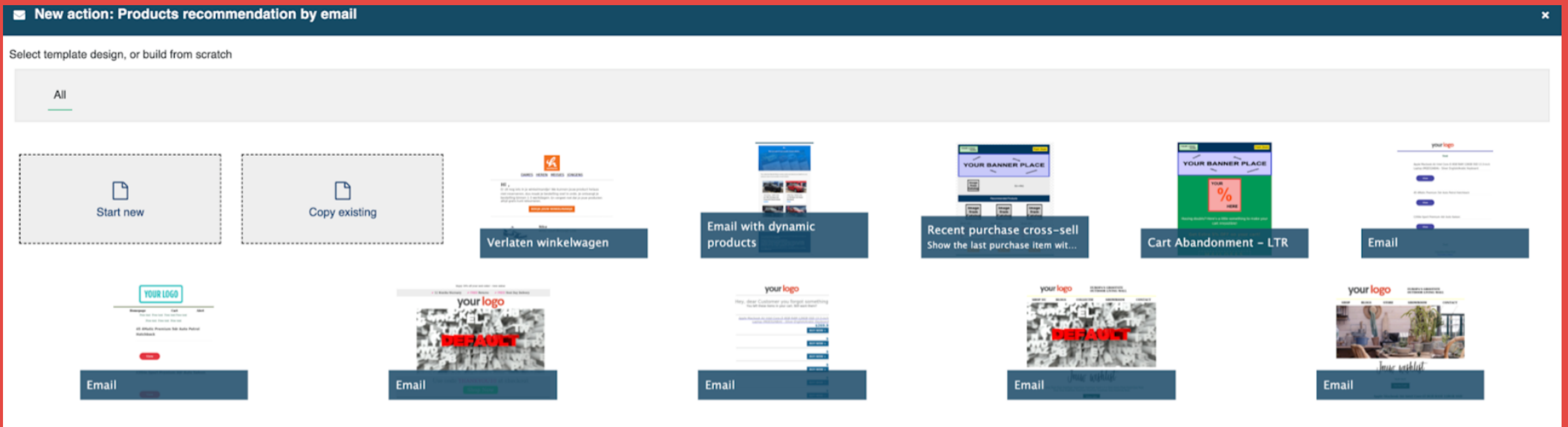
Read more about Personyze algorithms

Step 2: Template

Next is the design of the email itself.

The first step is choosing a template, or uploading your own.

All Personyze templates are responsive.



Step 2: Email Design

Use our HTML editor to edit one of our templates, or your own design.

> 1 Recommendation type > 2 Sender settings > 3 Email look > 4 URL parameters > 5 Timing

Design the widget that will be presented on the site.

☰ Frame

🖼️ Logo Line

☰ Top Menu

🖼️ Picture

△ Text

🖼️ Product image

📄 Product name

📄 Second line ☒

△ Bottom Text

🖱️ Button ☒

△ Bottom Text 2


🔗 HTML Source (advanced)

Preview as on: ☒ Phone ☐ Tablet

Select the element and see edit options

Click on the element to edit its content

You have the option to directly edit the HTML



HEREN MEISJES JONGENS

Hi,


Er zit nog iets in je winkelmandje, vergeet niet te bestellen! Wacht niet te lang, want deze favorieten zijn erg populair. Je ontvangt je bestelling binnen 1-3 werkdagen. En vergeet niet dat je jouw producten altijd gratis kunt retourneren.

Text: Text


BEKIJK JOUW WINKELMANDJE



Medicus
Lichtgrijze suède sneaker
€ 34.99



Easy Street
Zwarte leren Zweedse muil
€ 22.99



Graceland
Beige sneaker mesh
€ 29.99

Step 2: Dynamic Variables

Personyze variables can be inserted into the email content, for example first name, company name, or account details.

1 Sender settings > 2 Email look > 3 Timing

Design the widget that will be presented on the site.

Properties of: Info: Text before button

Return

Text before button

Source

B I U abc x₂ x²

Insert image

Insert Personyze variable

Insert Close Action button


Font Size A A

Double click to edit. This variable will be substituted with corresponding data, that Personyze has for current visitor

Split to alternatives

more

Preview as on: Phone Tablet



Hello Customer

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec libero purus, efficitur dictum dolor nec, malesuada vestibulum lorem. Quisque imperdiet pharetra nunc et rutrum.

Quisque at augue et neque rhoncus dictum. Suspendisse risus magna,

Step 2: No Recommendations Designs

Personyze can also send emails with no recommendations.

> 1 Sender settings > 2 Email look > 3 Timing

Design the widget that will be presented on the site.

Box

Call

Event

Text

Link

Style

Location

Attend event

Twin Cities Code Camp 17

Use HTML editor

https://www.eventbrite.com/

Font size: 24 px

Line height: 26 px

Text transform: uppercase

Text color:

Text decoration: none

Text

Bg

Box


Pos

Other

Source




Preview as on: Phone Tablet

Event to be held at the following time, date, and location:



Saturday, October 4, 2014 from 8:30 AM to 5:00 PM (CDT)
University of Minnesota - Keller Hall
EE/CS Building
200 Union Street SE
Minneapolis, MN 55455
[View Map](#)

Attend Event

Share this event:


Twin Cities Code Camp 17 is happening on October 4th, 2014 at the University of Minnesota! The Twin Cities Code Camp is a FREE, biannual coding conference held in the Minneapolis / St. Paul area. TCCC is full of content from great local and regional speakers across all stacks and styles of software development. It's by devs for devs! Be prepared, you will learn a ton! TCCC follows the guidelines...

Share this event on [Facebook](#) and [Twitter](#)

We hope you can make it!

Cheers,
Twin Cities Code Camp

Action name

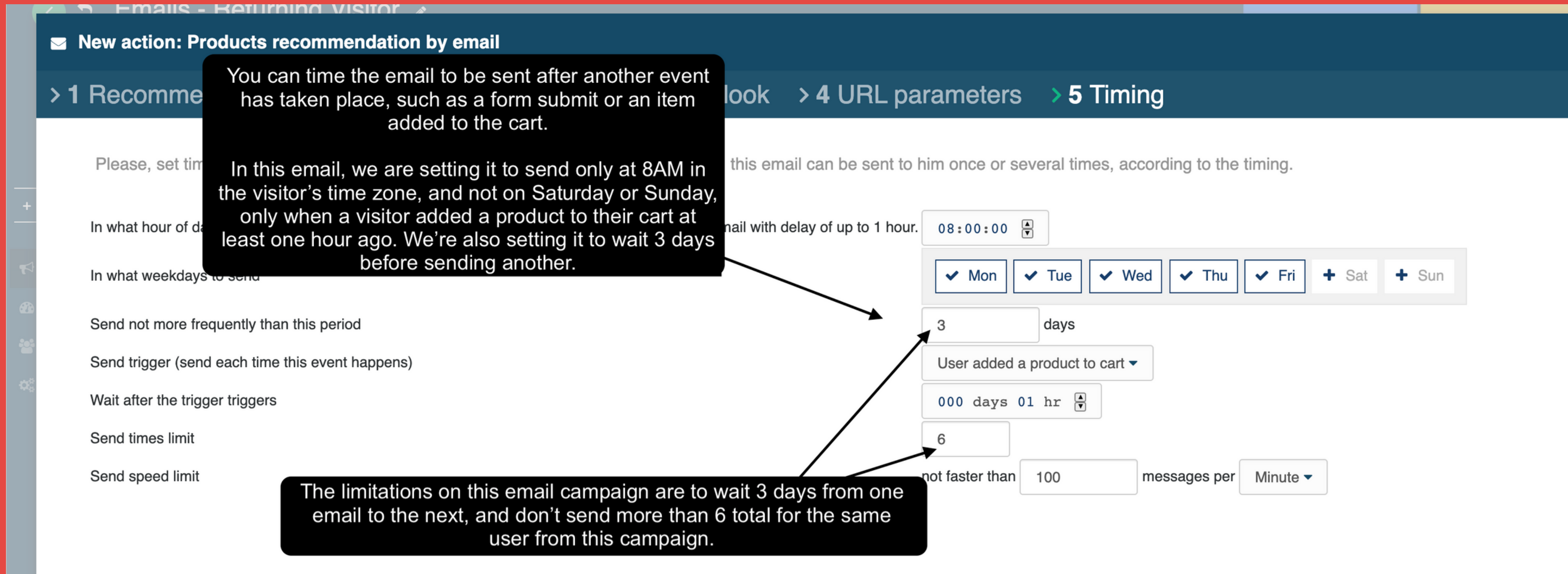
Add to templates

Cancel

Done editing (to save changes, save the Campaign)

Step 3: Timer Settings

Here you determine exactly when the email will be sent, and what limitations it should have.



Review and QA Campaign

Here you can
email who

each of the
also selected

In the QA step, you can preview exactly what emails and their content will look like if they are sent to any given user, and also review what sent emails looked like.

Testing mode

Users that are currently matching the audience

⌂ « 1 2 3 4 » Filters Show columns Last time audience rules checked against user

User ID	Properties	Session counter	Last session time	Data last modified
1909682100	Test send emails What executed <ul style="list-style-type: none"> View Profile User lists Interests Product Interactions Article Interactions 	2	Apr 22, 20 11:58 AM	Apr 22, 20 5:18 PM
	Test send emails			

Step 3: QA

Here you can send test emails, view what emails will look like if sent, review sent emails, and see the interests and data that are feeding the recommendations and variables.



Wist je dat...
we gemiddeld 90% van onze tijd binnen spenderen?

Hierdoor is het erg belangrijk dat de lucht die je thuis inademt schoon is. Toch is dit vaak niet het geval. **De luchtkwaliteit binnen is tot wel 5x slechter dan buiten.** Bacteriën, pollen, gassen en fijnstof kunnen de lucht binnen flink vervuilen. Een luchtreiniger is een goede manier om dit op te lossen, zeker nu de hooikoortsperiode weer is aangebroken.

Meer weten? Bekijk ons advies over luchtreinigers.

[Advies luchtreinigers >](#)

Speciaal voor jou geselecteerd



Krups Nescafé Dolce Gusto MiniMe KP123B (Grijs)

54,99
49,99


[Shop nu >](#)



Samsung Amerikaanse koelkast RS68A8821S9

1.499,-
1.274,15

[Shop nu >](#)



Bosch industrie kookplaat PVS775FB5E

578,-

[Shop nu >](#)

← → ↺ 🏠 https://personyze.com/site/tracker/condition/index/server_id/4861#cat=Campaigns/condition.offline_email.offline-c45-cv1

Recently viewed

Campaign description

User Base ▶

Review and analysis

Here you can view the results of the campaign based on their user data. In testing mode will only show the results of the testing mode email.

Testing mode email

Users that viewed

🔄

«

1

User ID

1485585825


1308941423

View Profile

User lists

Interests


Product Interactions



20/70 Reg | 1214 miles

Vauxhall Corsa 1.2 Turbo Elite Nav 5dr Petrol Hatchback - Sale now on


£6841



18/18 Reg | 19457 miles

Vauxhall Corsa 1.4 Design 5dr Petrol Hatchback - Sale now on

£6841



20/70 Reg | 3115 miles

Kia Picanto 1.25 2 5dr Petrol Hatchback - Sale now on

£9640

Location: Coatbridge, United Kingdom

User ID: 1485585825

rel: 1

Session counter: 3

Last session time: May 24, 21 12:32:59 PM

Data last modified: May 24, 21 2:17:51 PM

Current city: Coatbridge

Current country: United Kingdom

Last used domain: www.macklinmotors.co.uk

Available location: Nissan Glasgow Central

Email: [redacted]@icloud.com

rules checked against users: before 3

Current state

Current count

Product ID	Product title	Quantity	Status	When
2601486	1.4 Design 5dr Petrol Hatchback	1	Viewed	May 20, 21 5:00:29 AM
2657893	1.2 Turbo Elite Nav 5dr Petrol Hatchback	1	Viewed	May 20, 21 4:58:39 AM
2644662	1.25 2 5dr Petrol Hatchback	1	Viewed	May 20, 21 4:56:58 AM
2601486	1.4 Design 5dr Petrol Hatchback	1	Viewed	May 19, 21 4:52:32 PM
2497266	1.4 Boosterjet 48V Hybrid Sport 5dr Petrol Hatchback	1	Viewed	May 19, 21 4:46:52 PM
2644662	1.25 2 5dr Petrol Hatchback	1	Viewed	May 19, 21 4:41:47 PM

Preview the recipient's email, with the algorithm as recently vieweved

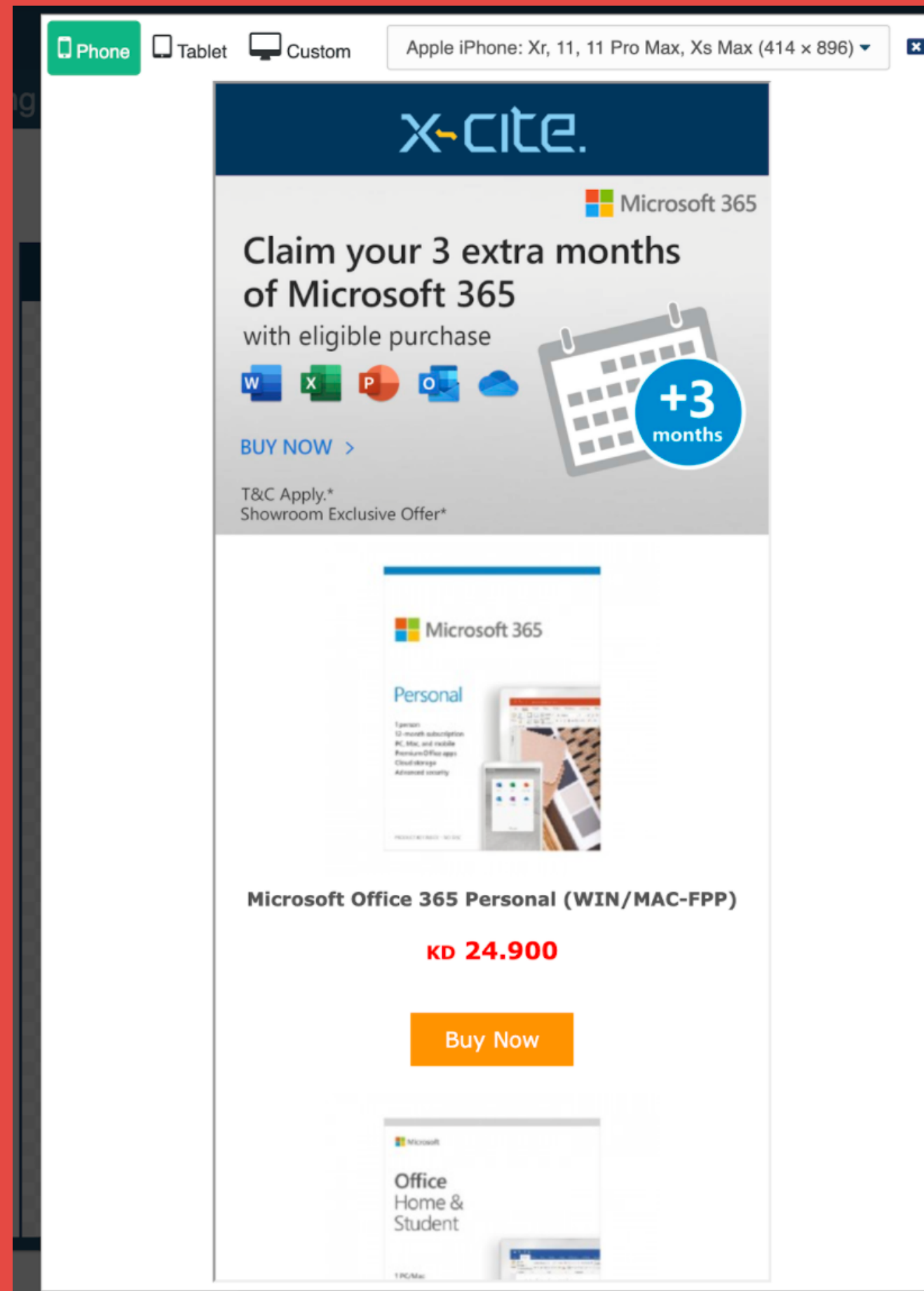
View the recipient's user data

Recipient's activity on the site

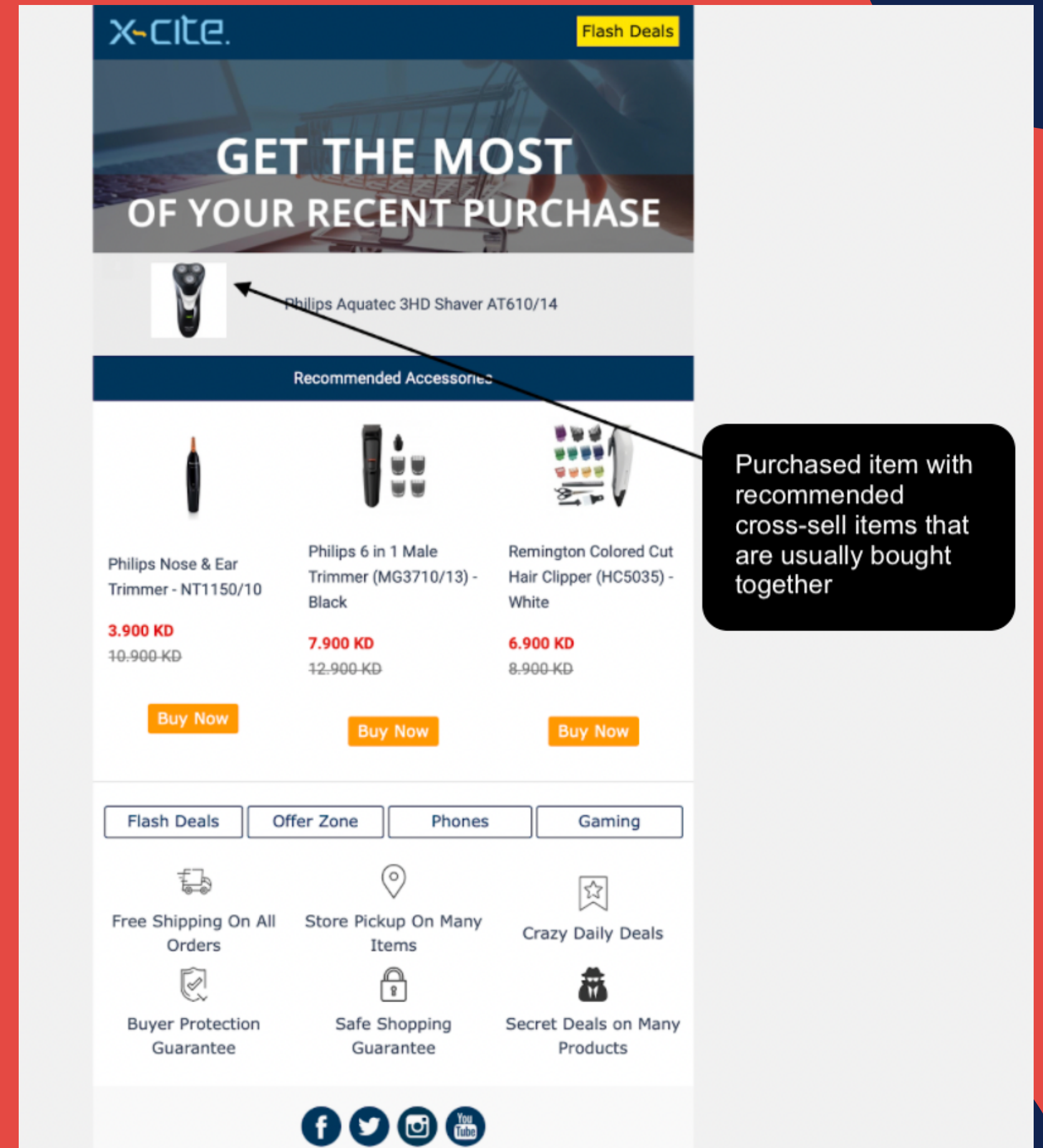
Step 3: QA

QA for emails, allows you to see what the recipient will see and why, such as detailed user info, as well as user activity on the site.

Preview on a phone or tablet

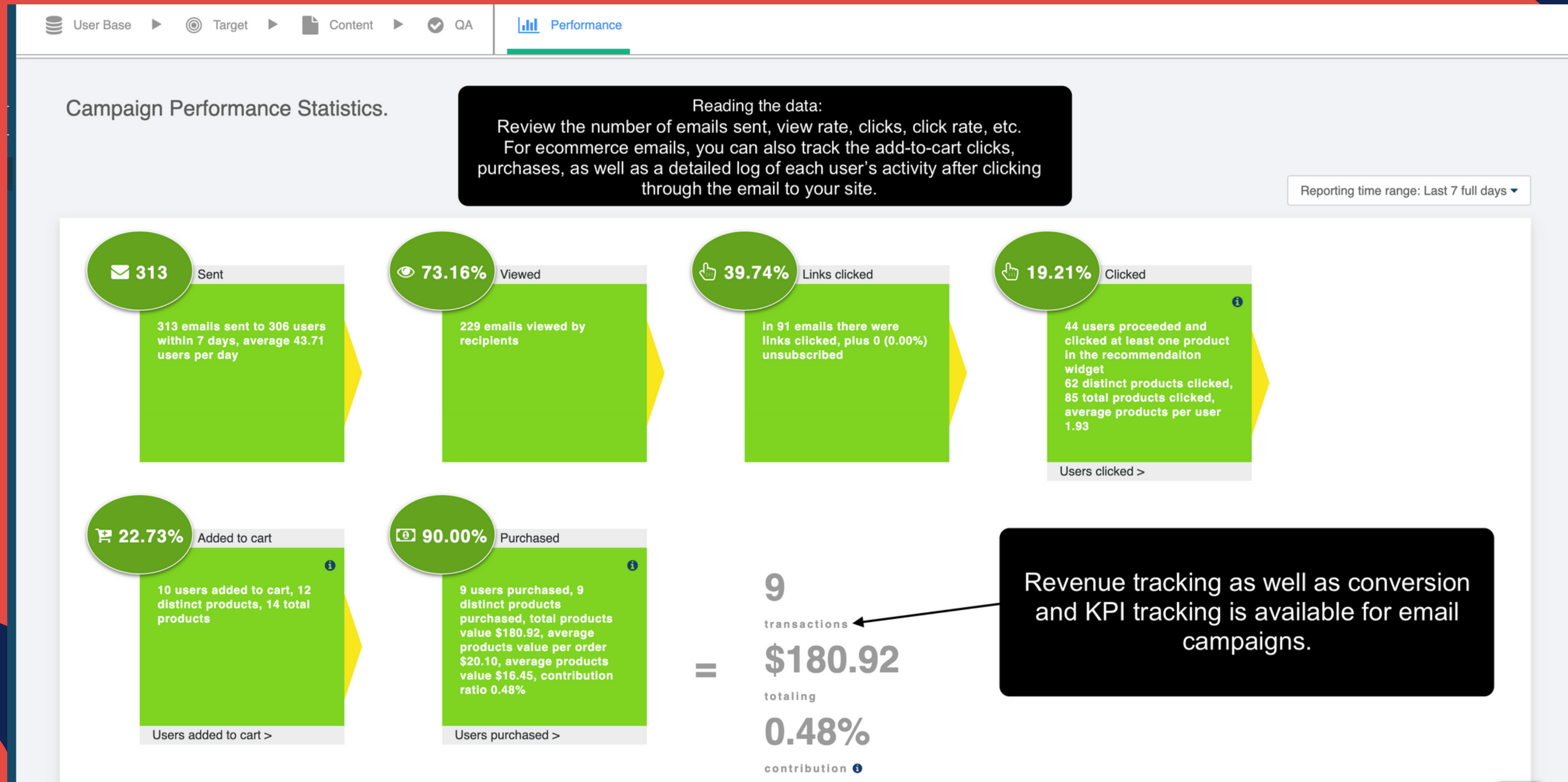


Send cross-selling recommendations



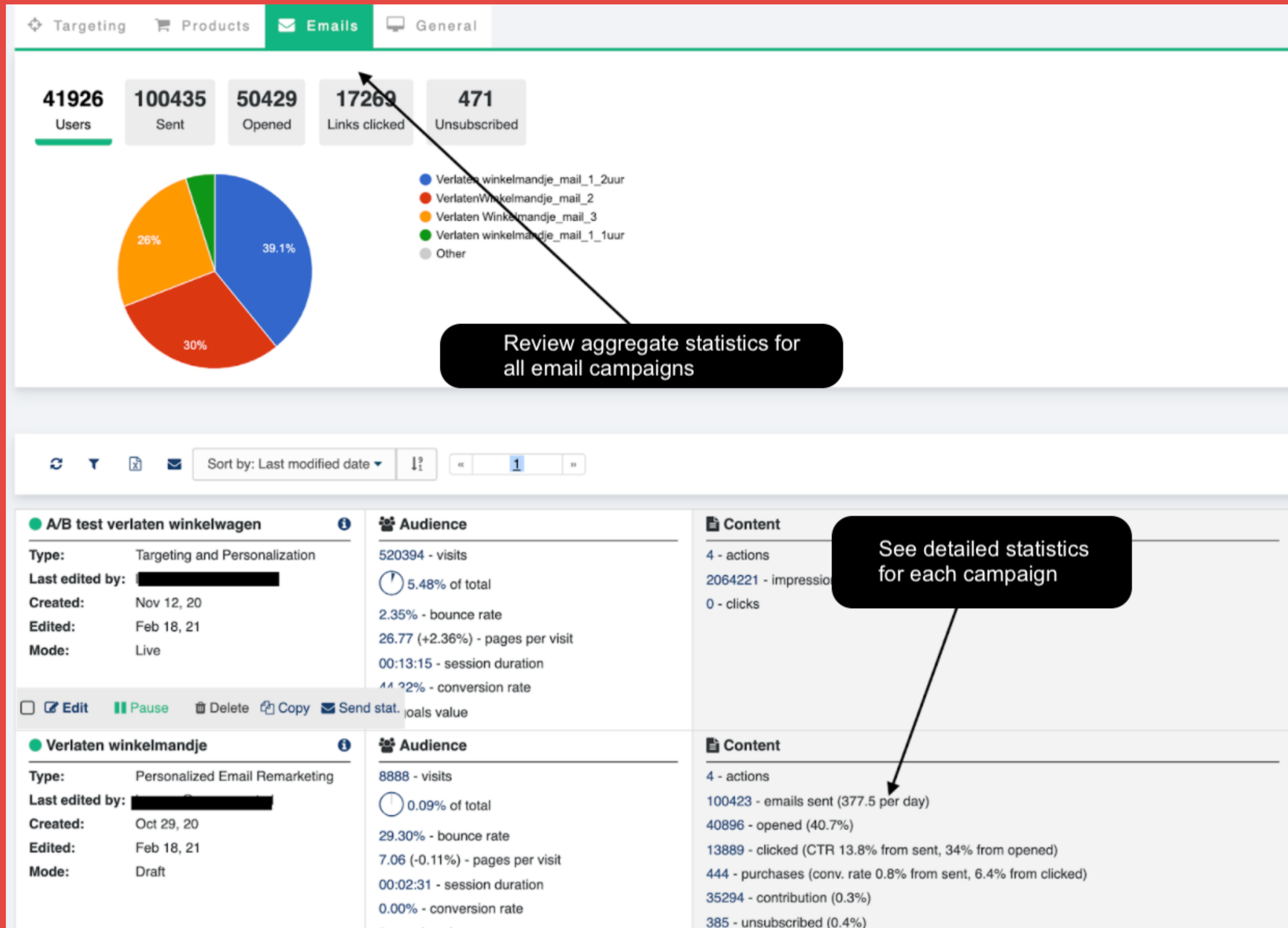
Review Performance

Once your emails are sent



[Read more about Personyze analytics here](#)

General Statistics





PERSONYZE

**It's as simple
as that!**

**IF YOU'D LIKE HELP WITH
YOUR PERSONALIZED
EMAILS, LET YOUR
ACCOUNT MANAGER KNOW.**

OR SIMPLY EMAIL:
SUPPORT@PERSONYZE.COM

**THANKS FOR VIEWING
OUR PRESENTATION**