



Adobe® Marketing Cloud

CheetahMail

GENESIS INTEGRATION GUIDE

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Preface

The Adobe® CheetahMail Integration Guide introduces the Genesis™ integration for CheetahMail. This integration lets CheetahMail automatically send data to Adobe SiteCatalyst®, and integrate it with the rest of your Web analytics. After configuring the integration, you can generate reports that include information about how CheetahMail email marketing drives traffic, and ultimately revenue, to your on-line business.

The CheetahMail Integration Guide includes the following sections:

- [Integration Overview](#)
- [CheetahMail Integration](#)

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Intended Audience

This document is intended for Information Services professionals and on-line Marketers that are familiar with configuring SiteCatalyst, including SiteCatalyst variables (eVars, events, props). You must also be familiar with CheetahMail Email Marketing Product.

Account Support

The Adobe support team is available to help you:

- Answer specific product questions
- Ensure that you can utilize the provided reports to their maximum capacity
- Help resolve any technical difficulties

For information about contacting Account Support, see [Adobe Contact Information](#).

Service and Billing Information

Depending on the service level you have purchased, some of the options described in this guide might not be available to you. Because each account is unique, refer to your contract for pricing, due dates, terms, and conditions. If you would like to add to or otherwise change your service level, or if you have questions regarding your current service, please contact your Account Support Manager.

Feedback

Adobe welcomes any suggestions or feedback you might have regarding the contents of this guide. Send comments to your Account Manager.

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Chapter 1

Integration Overview

Combining behavioral information from SiteCatalyst® with CheetahMail e-mail marketing creates a powerful tool for targeting audiences that are otherwise untapped. Delivering relevant email messages to these market segments can result in entirely new revenue opportunities, driving increased conversion and revenue among new and existing email campaigns.

For example, delivering relevant email messages based on products that were viewed during a visit or products that were left in an abandoned shopping cart can have dramatic impact on revenue with minimal impact on cost since this is simply leveraging visitors your site is already getting. This increase in marketing efficiency is one of the key benefits of integrating SiteCatalyst with CheetahMail. Additionally, this integration will automatically synchronize CheetahMail e-mail metrics with SiteCatalyst data for closed-loop reporting and remarketing.

This overview section contains information for the following topics:

- [Key Benefits and Features](#)
- [What You Should Know Before Activating This Integration](#)
- [Integration Procedure and Prerequisites](#)

1.1 Key Benefits and Features

- Consolidate e-mail marketing and analytics data into one reporting interface
- Optimize e-mail campaigns by conversion and contribution to revenue and site success
- Remarket to key visitors and market segments based on dynamic marketing segments spanning current and historical data (up to 90 days prior to activation)

Dynamic Marketing Segments Include:

- Purchase Profiles - Increase repeat orders and average order value through campaigns targeted by visitor purchase patterns
- Product/Content View Behavioral Profile – Reach prospective customers through marketing segments based on product views and content access profiling
- Cart Abandonment Profile – Help visitors convert to customers through fine-tuned campaigns specifically designed for those who are hesitant to complete orders

1.2 What You Should Know Before Activating This Integration

Before activating this integration, review the following requirements against your deployments of Adobe SiteCatalyst® and your CheetahMail setup. Additionally, confirm with your CheetahMail representative that you are configured correctly in their system to enable this integration.

This ensures that the appropriate best practices or pre-requisites are in place prior to activation, which results in a more optimal and successful integration.

Adobe Prerequisites

- This integration requires the Data Warehouse™ to be enabled in order to generate remarketing segments. If you have not enabled the Adobe Data Warehouse™, contact [Adobe Client Care](#) for details.
- Adobe SiteCatalyst report suite
- Up to 2 available and active SiteCatalyst custom conversion variables (eVars)

- Up to 6 available and active SiteCatalyst custom events (Refer [Preparing for the Genesis CheetahMail Integration](#)).

Adobe Pricing Considerations

There might be recurring and implementation fees associated with this integration. Please contact your Adobe Account Representative for pricing details. Contact information can be found in [Adobe Contact Information](#).

Partner Pricing Considerations

Experian has a one-time fee associated with this integration. Please contact your Experian Account Representative for further pricing details before starting the integration process. Contact Information can be found in [Experian Point of Contact](#).

Integration Time Line

This integration process may take approx. 3 – 6 weeks from the day of engagement. This time line may exceed depending upon the availability of Experian and the Client stakeholders.

1.3 Integration Procedure and Prerequisites

Before you can configure the integration for your account, review the following information:

- [Integration Details](#)
- [Preparing for the Genesis CheetahMail Integration](#)
- [Steps to reserve variables](#)

Integration Details

- **Report Suite Specific:** Be advised this integration is report-suite specific. Ensure that you have selected the desired report suite prior to activating the integration. Each CheetahMail Integration should be associated with only one SiteCatalyst report suite.
- **Authorized Representative:** Be advised that the enablement of this integration might cause your company to incur fees in accordance with your service agreement with Adobe, Inc. or your service agreement with one of Adobe's trusted partners, as applicable. By activating this integration, you hereby represent that you are an authorized representative of your company; and as such, your company agrees to pay the fees, if any, set forth in the service agreement described above.
- **Current Customer of CheetahMail:** This integration requires you to be a customer of both Adobe and CheetahMail. If you are not currently a customer of CheetahMail, and do not have an active deployment of CheetahMail features to your website, you will not be able to deploy this integration.

Preparing for the Genesis CheetahMail Integration

Before you can configure the integration for your account, you will need to have the following in place:

- Know which email address you want to use to receive notification concerning the integrated operations
- Decide which data collection method is to be used **i)** Automated (Recommended), **ii)** JavaScript Plugin (Refer Appendix B)
- You should know what **Query String Parameters** are being used for the Message/Campaign ID and Recipient/Visitor ID on the Landing Page
- Activate the custom conversion variables (eVars and events) that you will use for capturing CheetahMail event data within the Adobe SiteCatalyst. Please see the following table for information on activating eVars and events based on CheetahMail features you wish to track. These variables must be provided to the Adobe Consultant during Kick-off email

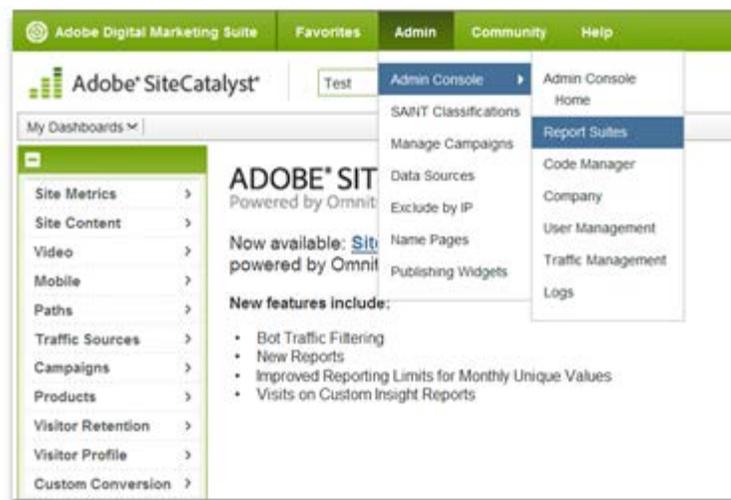
Table 1.1: SiteCatalyst Variables by Feature for the CheetahMail integration

Sr. No.	Variable Name	Variable Type	Comment
1	Recipient ID	Custom Conversion Variable	Required to capture CheetahMail Recipient ID for remarketing segments.
2	Message ID	Custom Conversion Variable (or campaign variable)	Required to capture CheetahMail specific message campaign for remarketing segments and events mapping. Campaign variable can optionally be used instead of a custom conversion variable.
3	Sent	Custom Success Event (Numeric)	CheetahMail Metric required to count the number of campaign (Message ID) specific emails sent to the recipients.
4	Delivered	Custom Success Event (Numeric)	CheetahMail Metric required to count the number of campaign (Message ID) specific emails that were delivered successfully.
5	Opened	Custom Success Event (Numeric)	CheetahMail Metric required to count the number of campaign (Message ID) specific emails opened by recipients.
6	Clicked	Custom Success Event (Numeric)	CheetahMail Metric required to count the number of campaign (Message ID) specific emails which were clicked by the recipients.
7	Unsubscribed	Custom Success Event (Numeric)	CheetahMail Metric required to count the number of recipients, that had unsubscribed the specific campaign (Message ID).
8	Total Bounces	Custom Success Event (Numeric)	CheetahMail Metric required to count the number of campaign (Message ID) specific emails which were bounced.

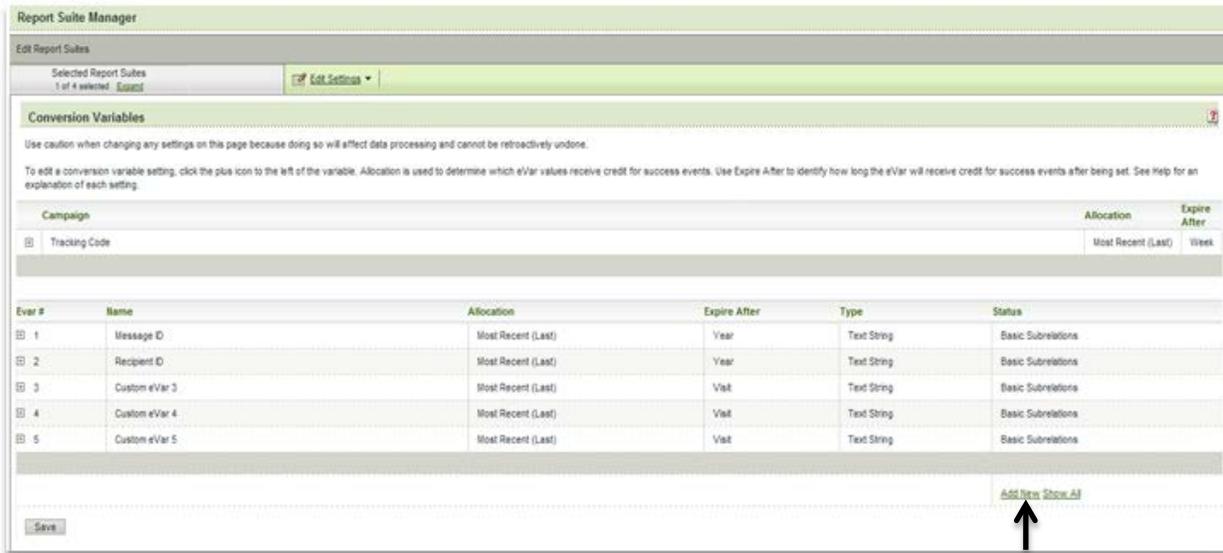
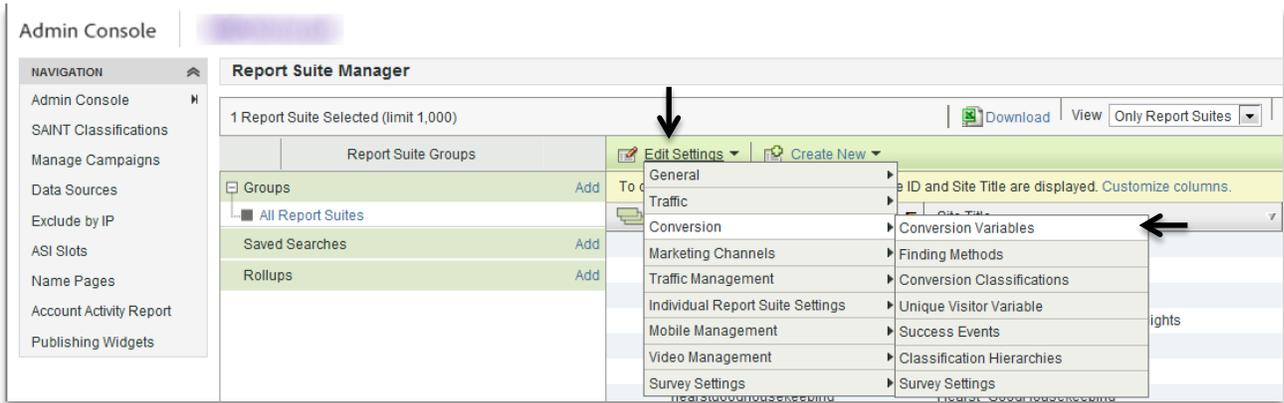
Steps to Reserve Variables

The following will take you through the procedure of reserving the custom conversion variables (eVars, Events):

1. Under the Admin tab at Adobe Marketing Cloud, select Report Suites under Admin Console.



2. Select the relevant report suite from the list and then under the “Edit Setting” Tab, select Conversion and then click on “Conversion Variables” as shown below:



3. Click on “**Add New**”, fill in the following information and then click “**Save**”:
 - a. **Name** – Click on check box and provide the name of the eVar, e.g. Message ID or Recipient ID. You may provide any name as per your convenience.

Note: If you plan to use the Tracking Code instead of a new variable for Message ID, you should create only one variable i.e. for Recipient ID.

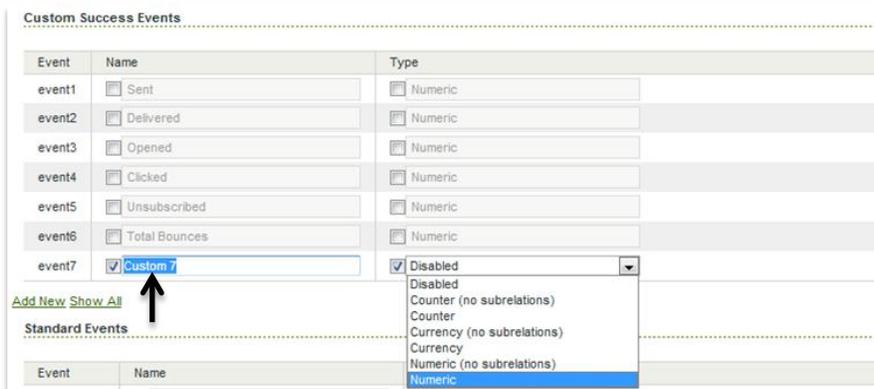
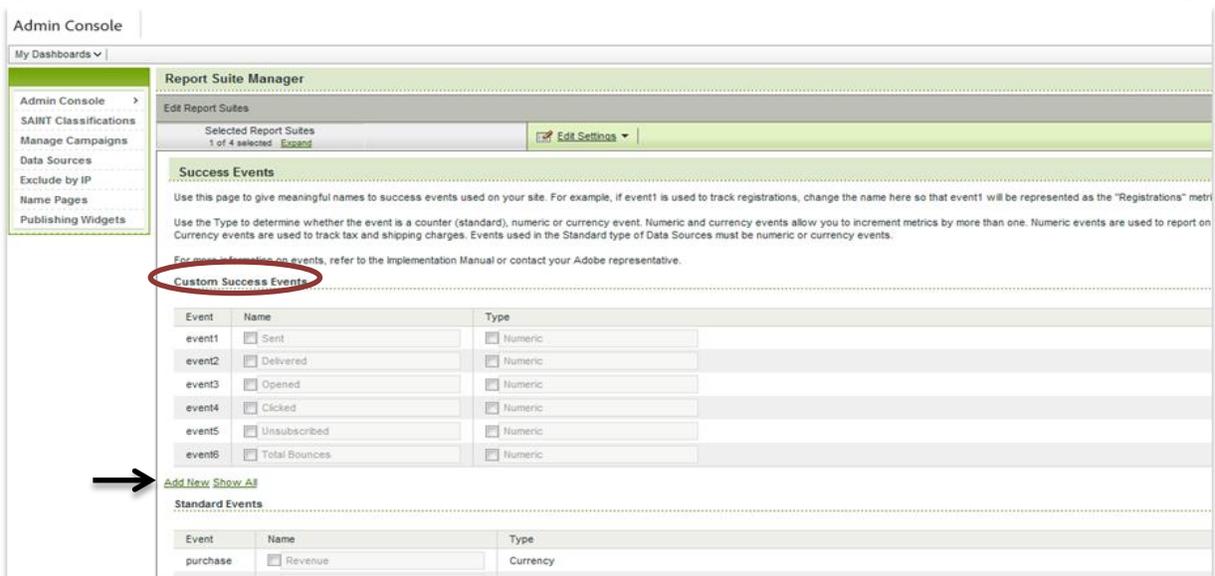
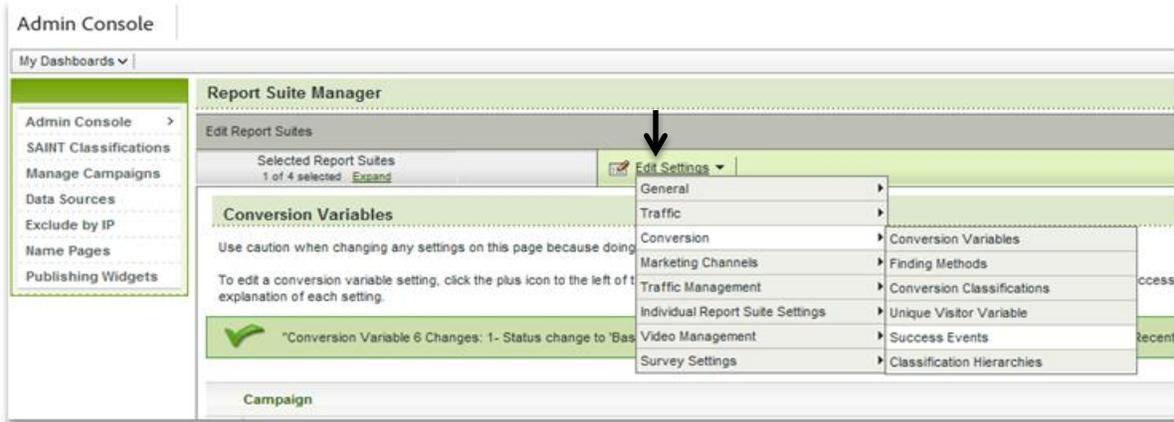
- b. **Type** – Must be left at default value “**Text String**”.
- c. **Allocation** – Value depends upon the business requirement (Generally set as “**Most Recent**”).
- d. **Status** – Click on check box and change the value to “**Basic Sub relations**”.
- e. **Expire After** - **Depends** upon the business requirement.
- f. **Reset** – Depends upon the business requirement (Generally set as “**Do not Reset**”).



4. Accept the warning message and wait for the screen to refresh. You should see a confirmation message.
5. Repeat this process for each variable unless you are using the tracking code instead of new Message ID

eVar.

- Go back to the **Edit Settings** tab and select **Conversion** → **Success Events**. Refer the figures below.
- Click on **"Add New"** under **"Custom Success Events"**(as shown below) and the following information:
 - Name:** Provide the name of the event, e.g. Sent, Opened, Total Bounces etc. You may provide any name as per convenience.
 - Type:** Select the Event type as **"Numeric"**.
 - Repeat this step for every new event and then click **save**.
- Accept the warning message and wait for the page to refresh. You should see a confirmation message



Chapter 2

CheetahMail Integration

Configuring Genesis CheetahMail integration involves the following tasks:

- Configuring the Integration
- Verifying the integration
- Sample Integration Report

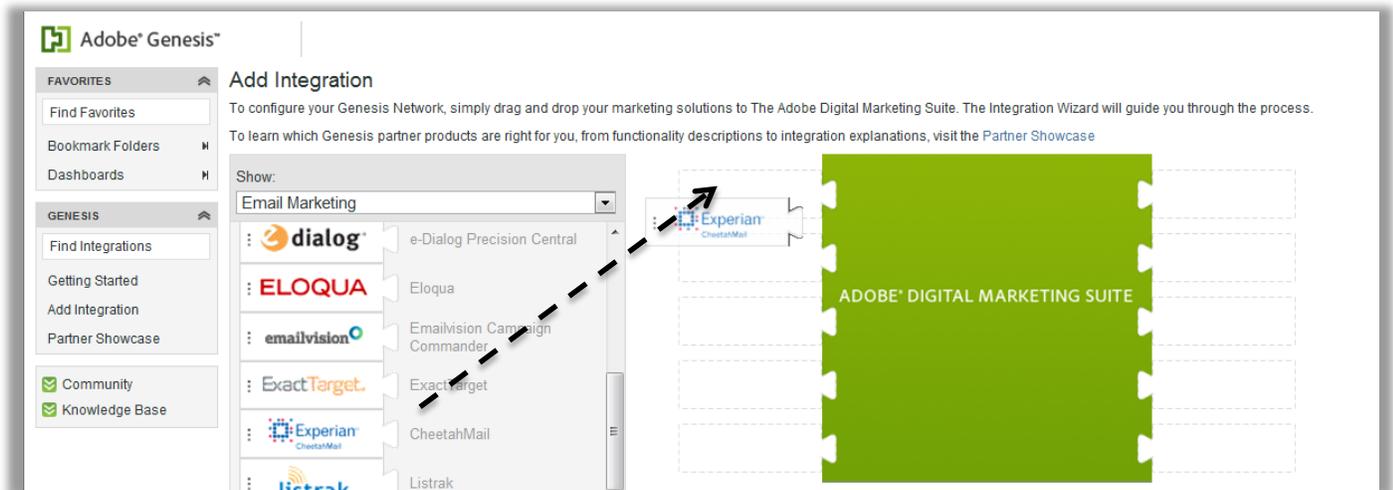
2.1 Configuring the Integration

The Genesis™ Integration Wizard steps you through the Genesis integration for CheetahMail. Before you begin, ensure you have met the prerequisites as described in [What You Should Know Before Activating This Integration](#).

NOTE: You can always edit the integration later.

To configure a CheetahMail integration

1. Under the Adobe Marketing Cloud, select Genesis™ from the products drop down list. 
2. In the left column, click **Add Integration** and select **By Name** in the **Show** drop down list.
3. Launch the Genesis Integration Wizard by dragging the **CheetahMail** icon to an empty plug-in slot on your green Marketing Cloud square; see below.



4. Step 1 contains the instruction and a guide to integration, click **Next >**.
5. Provide the following information and click **Next >**:
 - a. **Report Suite:** Choose the report suite from the drop down menu, to which you want CheetahMail to get integrated. You can choose only one report suite per integration
 - b. **Display Name for Integration:** You should choose any name for this integration however, it won't be of much use to put partner and report suite name as the integration name
 - c. **Description for this Integration:** You can write a short description about the integration
 - d. **Email Address:** Provide an email address where you want to receive emails regarding this integration
6. Provide your CheetahMail Account ID and click **Next >**. You may want to consult with CheetahMail about what to fill in this field.
7. Perform the following steps and click **Next >** :

- a. Choose the eVar from the drop down list under “Available eVars” to map CheetahMail Recipient ID to SiteCatalyst eVar. Refer to [Preparing for the Genesis CheetahMail Integration](#). Check the box confirming that you agree and understand the statement written.
 - b. If you wish to participate in the Remarketing Segments program, check the box inside each one you wish to have. You can also choose custom segments you have created in SiteCatalyst’s segment builder. For further information on creating custom segments, refer to “Appendix A – Building Custom Segment”.
8. Choose the eVar from the drop down list under “Available eVars” to map CheetahMail Message ID to SiteCatalyst and **click Next >**. Refer to [Preparing for the Genesis CheetahMail Integration](#).
 9. Allocate appropriate events from the drop down menus for each Email Metric and **click Next >**. These events are the ones which you had reserved during pre-integration setup. Refer to [Preparing for the Genesis CheetahMail Integration](#).
 10. You may choose either of the solutions as data collection method and click **Next >**:
 - a. **Automated Solution (Recommended)**: This solution automatically collects the required information from the landing page with the help of query string parameters. Provide the Message ID and Recipient ID query string parameter of the landing page.
 - b. **JavaScript Plug-in**: You must install the SiteCatalyst plug-in (Contact your Adobe Consultant for further details and procedures). This plug-in will enable SiteCatalyst to identify and capture incoming traffic resulting from CheetahMail-produced e-mail campaigns. Refer “Appendix B” for more details.
 11. Check the boxes to indicate which SiteCatalyst Dashboard and/or Bookmarks you wish to be generated for you.

NOTE: These reports can be edited after you complete the wizard.

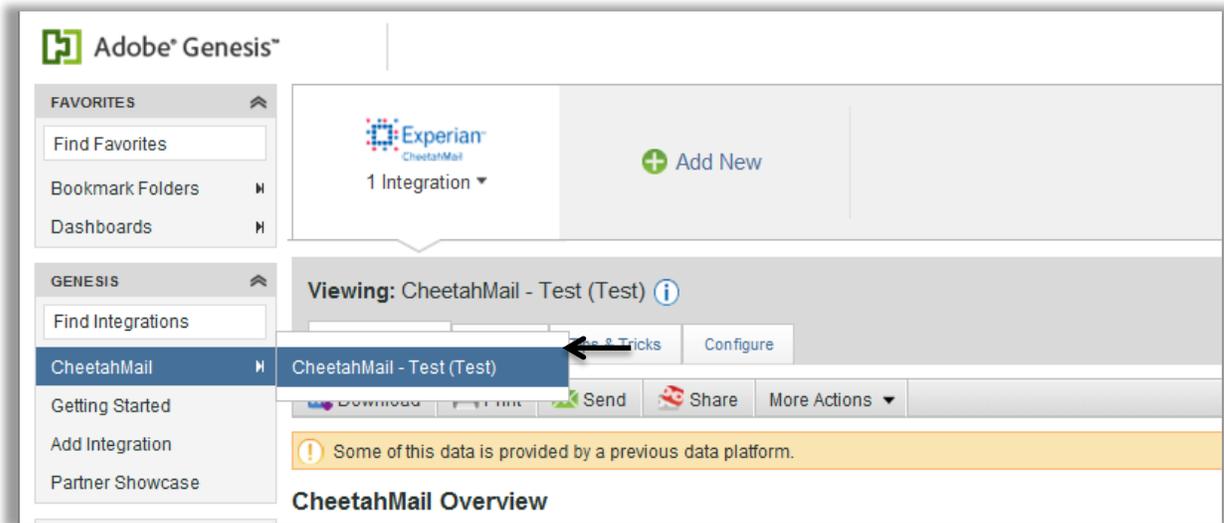
12. Review Summary and carefully review the configuration choices you have made. Once satisfied click **Activate Now**.

NOTE: Pay special attention to how report suite variables may be renamed before continuing. Each SiteCatalyst variable selection includes a field that displays the default name that Genesis assigns to the variable when the integration is complete. You can modify the variable name as desired, or leave the field blank to keep the variable name unchanged (as listed in the variable dropdown list).

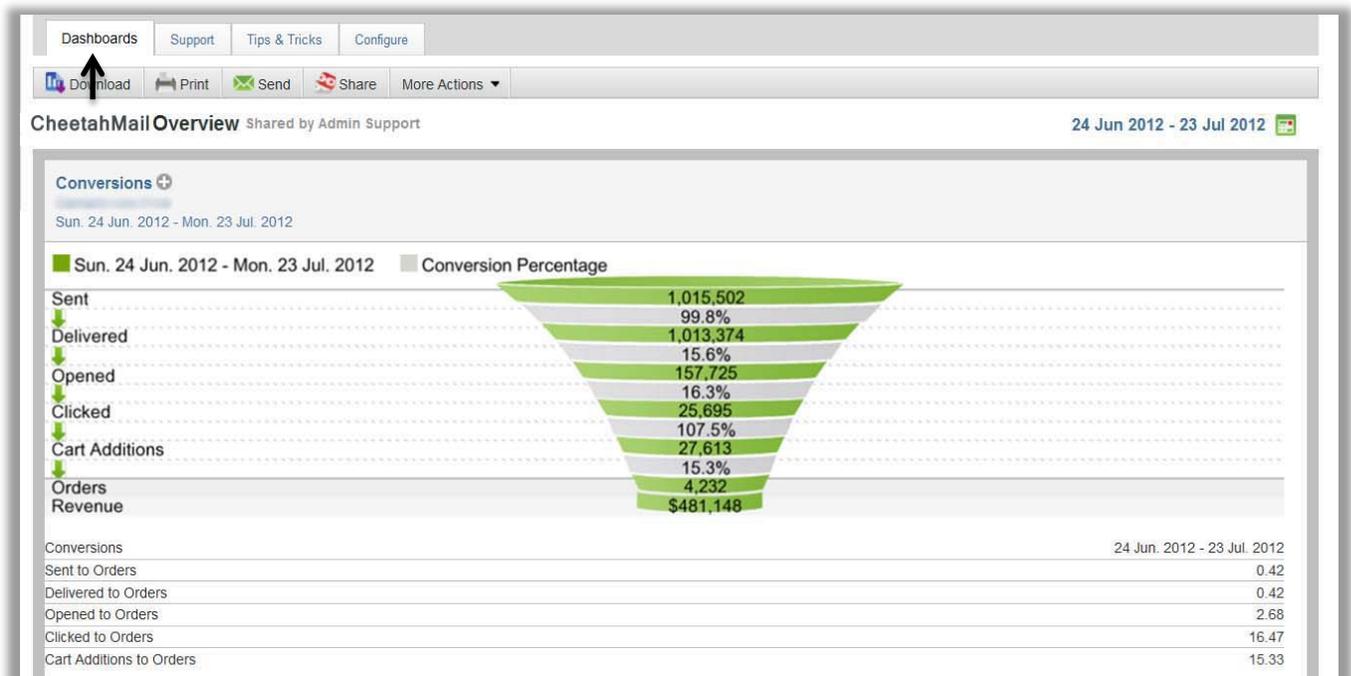
2.2 Verifying the Integration

You can verify that integration data is successfully flowing to SiteCatalyst by performing the following checks. These checks must be done after Experian has confirmed the integration on their end.

1. Checking the Reports
 - a. Navigate to Genesis Main Page by selecting Genesis under Adobe Marketing Cloud
 - b. Select the particular Integration that you want to verify



- c. Click on “Dashboard” tab and you should be able to see the reports that were created during integration process with data been populated.



- 2. Checking the data exchange
 - a. Now click on the Support tab as shown below. You should be able to see the logs of “Data in”, “Data out” and “Change Log”.

Integration Activity Log

Data In

Data Out

Change Log

23 Jun 2012 - 23 Jul 2012 

Show: All 

1 / 7 

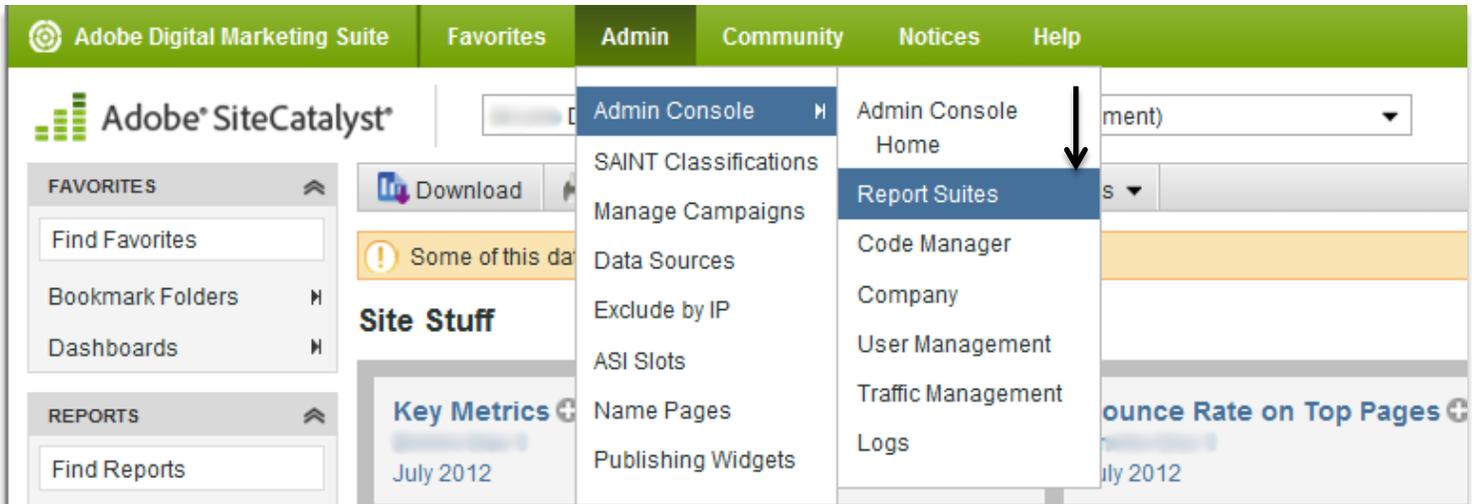
Event	Date
Classification data imported successfully (5 Row(s)).	23 July 2012 at 9:05am 
Metric data imported successfully (121 Row(s)).	23 July 2012 at 8:33am 
Classification data imported successfully (5 Row(s)).	22 July 2012 at 9:07am
Metric data imported successfully (88 Row(s)).	22 July 2012 at 8:34am

Appendix A – Building Custom Segment

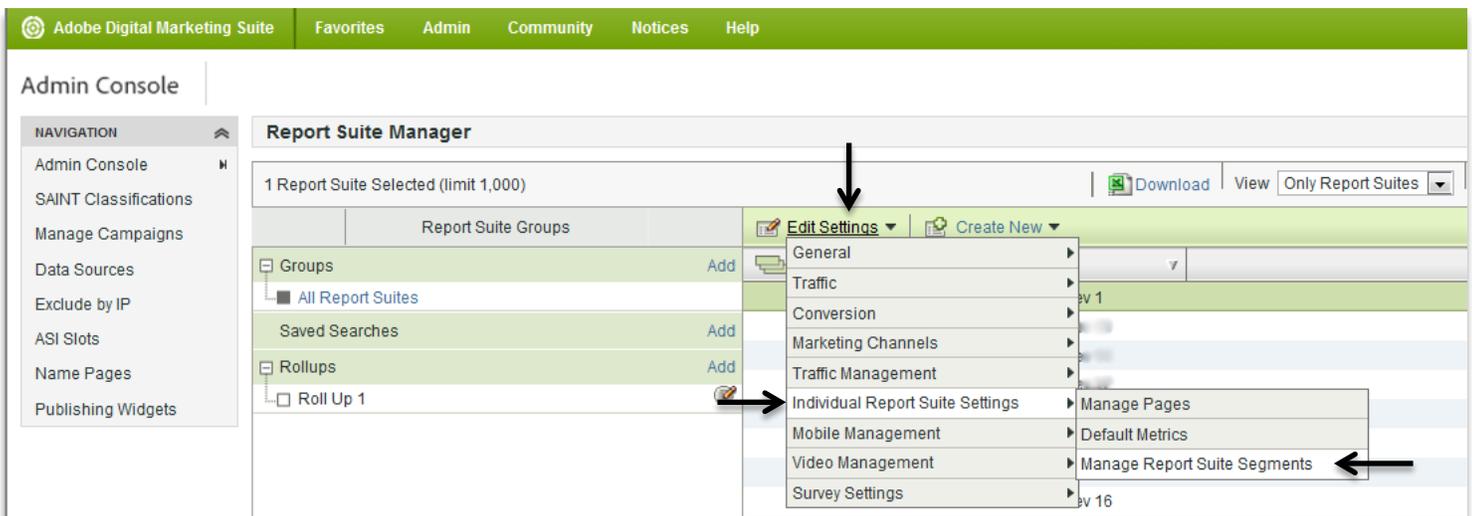
Apart from standard segments that are provided during the integration process (Cart Abandonment, Product Views and Product Purchases), you can also have custom made segments associated (report-suite level) with the integration. The following steps will show you how to add a new Global custom segment in your report suite. In this example, the segment will contain visitors from country – Canada who, after clicking through the email marketing message, abandoned the cart.

NOTE: Only SiteCatalyst users with administrative rights can create Report Suite-level Custom Segments.

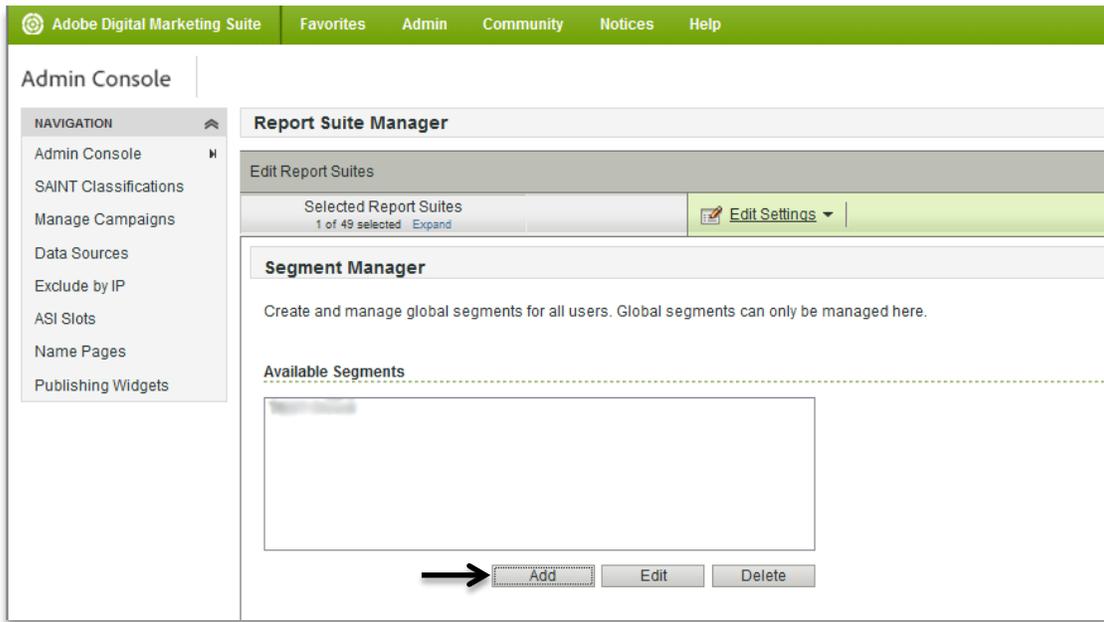
1. On the main page of Adobe SiteCatalyst, Admin → Admin Console → Report Suites. Refer to the figures below:



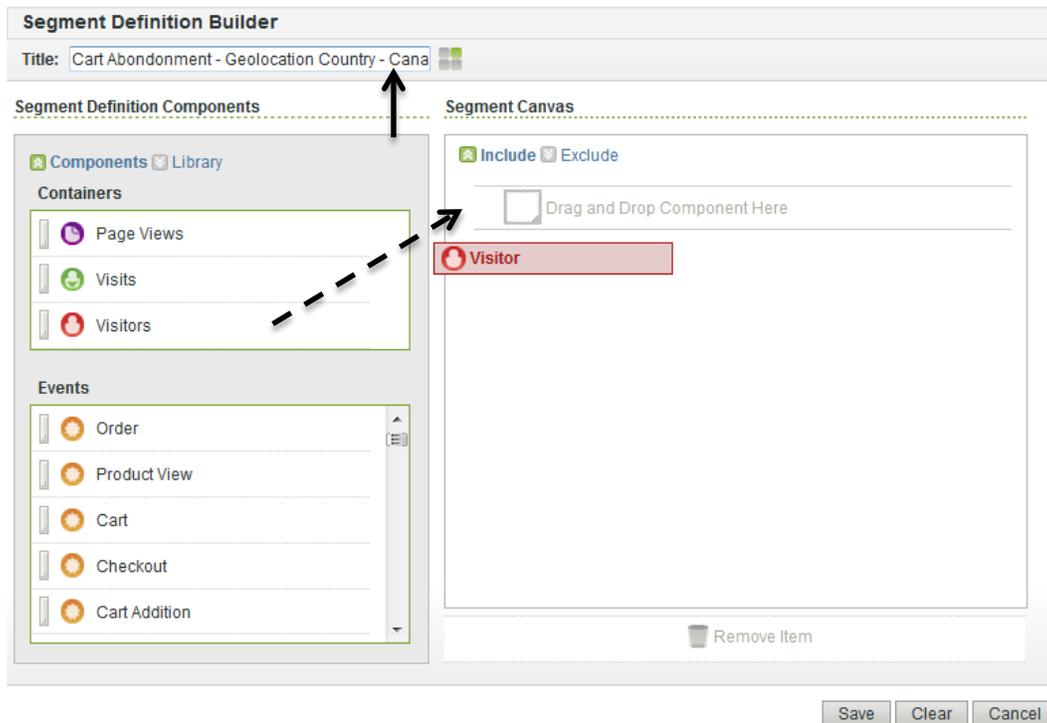
2. Select the specific report suite on which you have or you wish to have the integration. Then navigate - Edit Settings → Individual Report Suite Settings → Manage Report Suite Segments

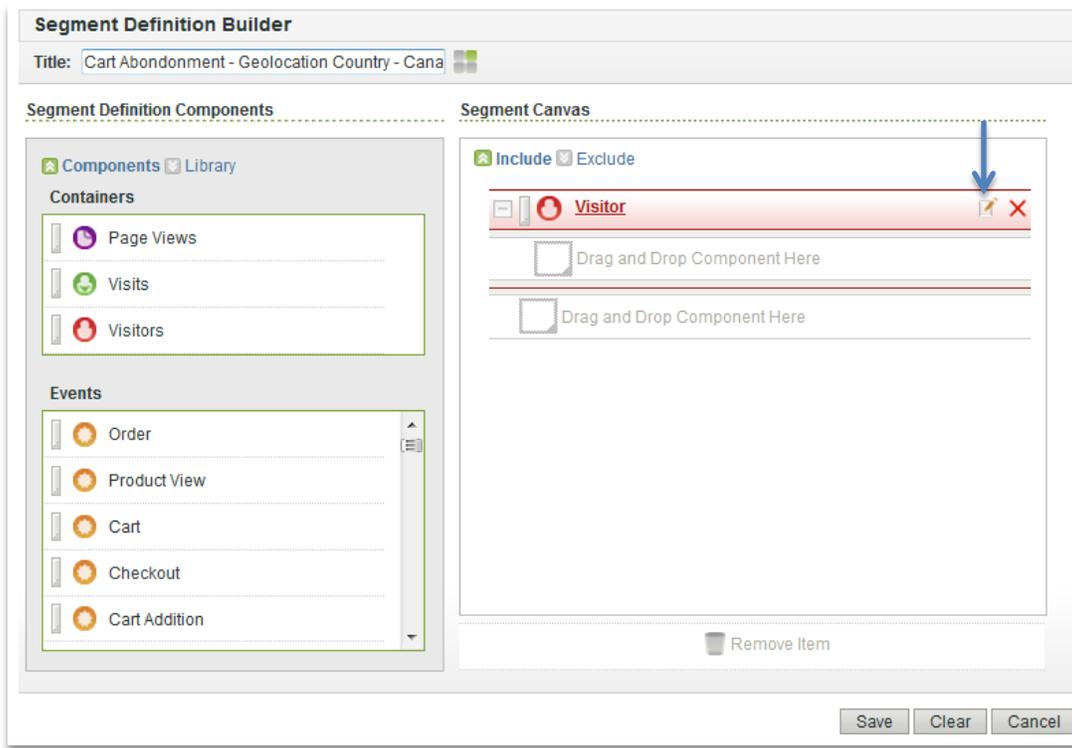


3. You may see all the Global segments enabled on this report suite. Click on “Add” button to add a new Global segment.



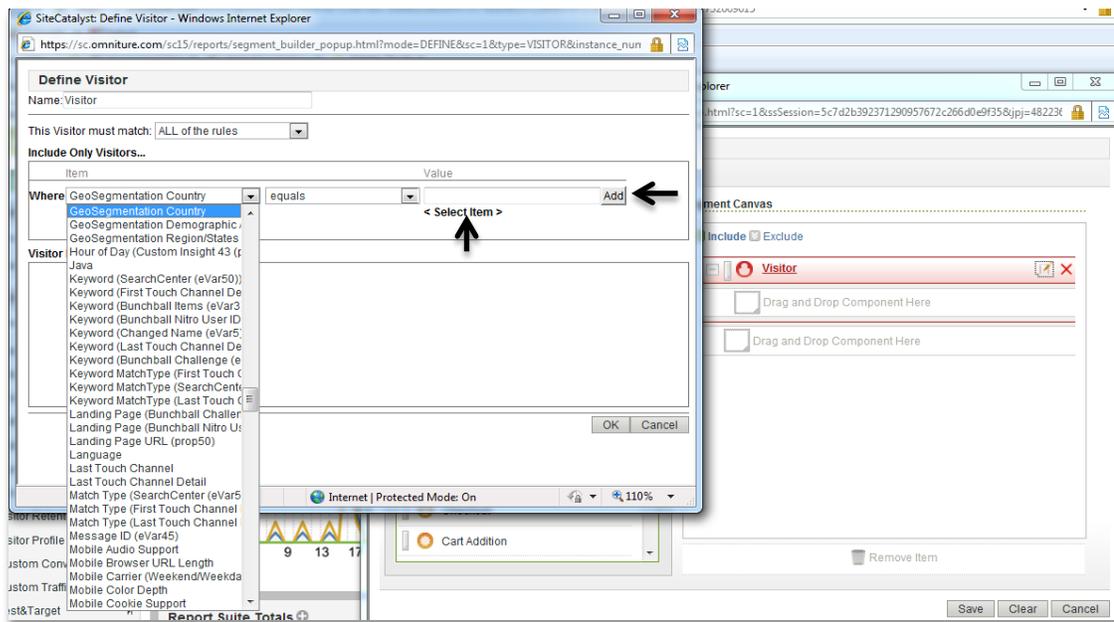
4. Enter a name for the segment in the "Title". Click on the edit button as indicated in the figures below (blue arrow) which pops up a new window.



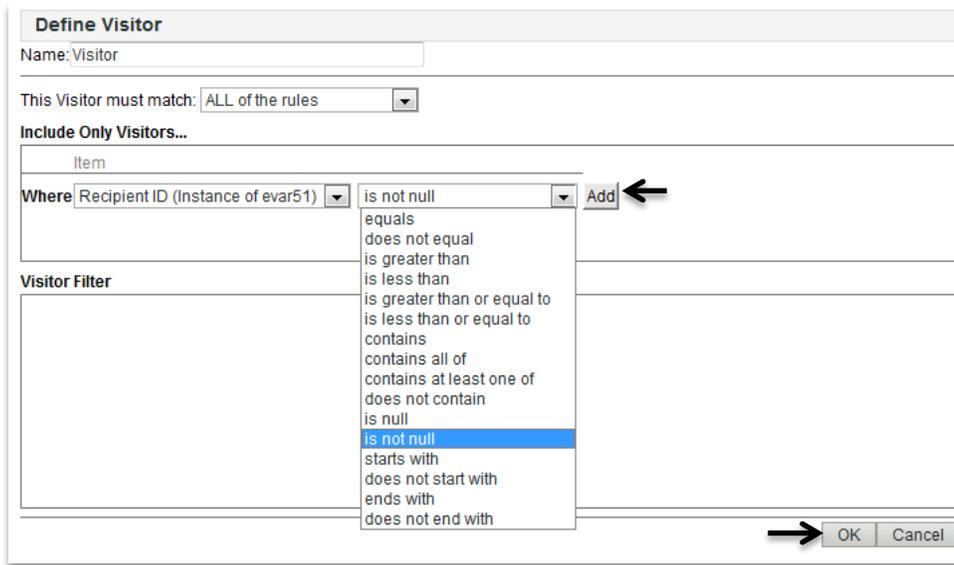


There are two rules which must be defined in this segment:

- a. Only include visitors from Canada, who
 - b. Have a valid visitor/recipient id (Visitors who came through email marketing only)
5. Select **“GeoSegmentation Country”** for **“where”** under **“Include Only Visitors”**. Click on **“<Select Item>”** and choose **“Canada”**. To enable the rule, click the **“Add”** button as indicated below:

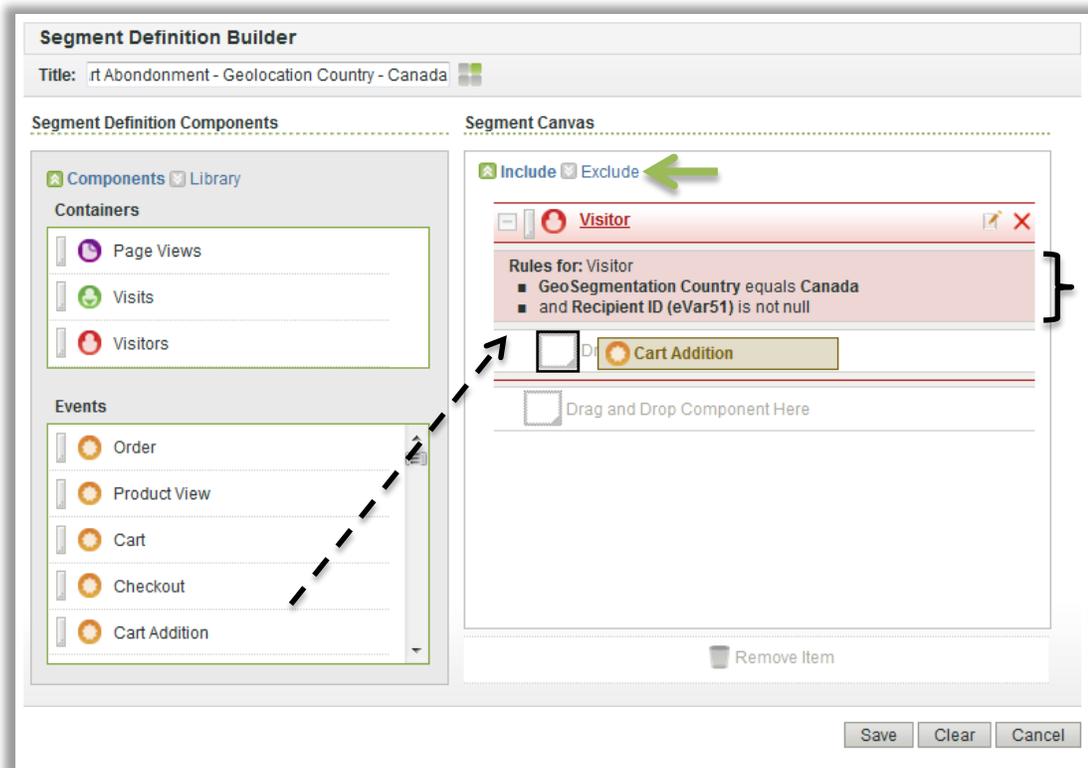


6. In the same way select **“Recipient ID”** (the one that you have used in the integration) and choose **“Not null”** as shown below. Click the **“Add”** button and then **“OK”**:



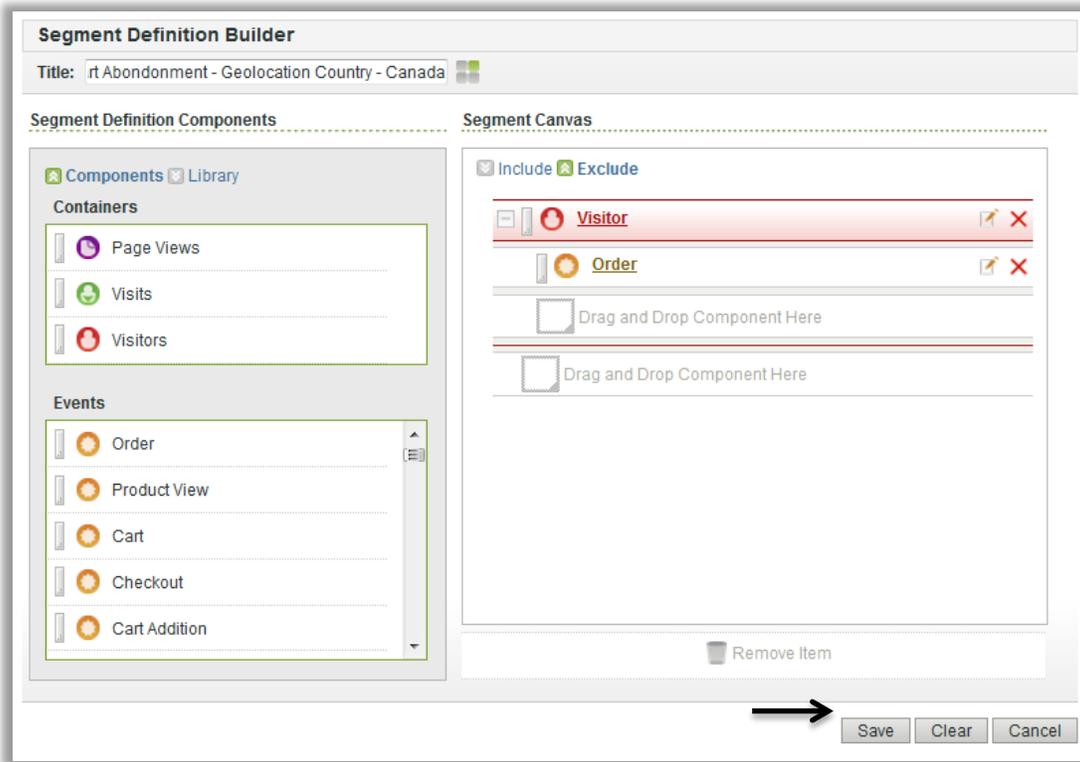
7. Now on the main segment definition window, drag the “**Cart Additions**” event **UNDER** the “**Visitors**” container:

Note: You should be able to see the rule you just added, under the Visitor’s tab as shown above.

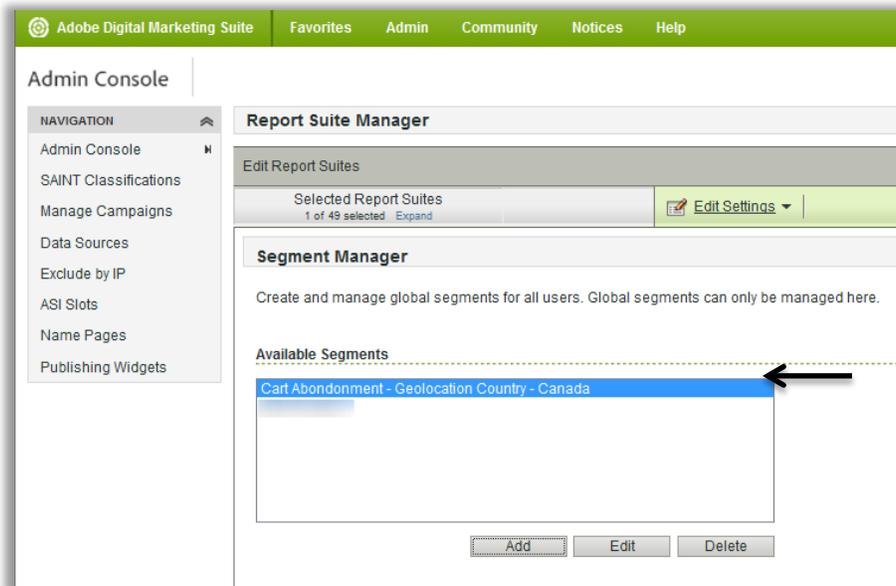


8. Click on “**Exclude**” tab as indicated in the figure above (Green arrow).

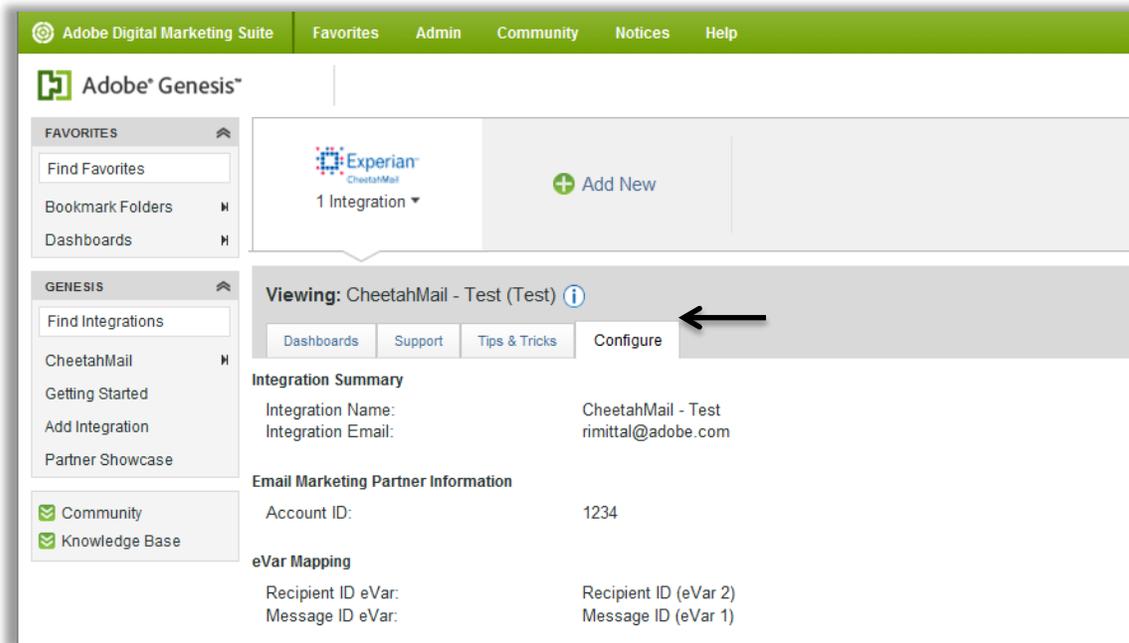
9. Drag the Visitors same way as was done previously. Do not add any rule to it. Now drag the “**Order**” event **UNDER** the Visitor section. Click “**Save**”.



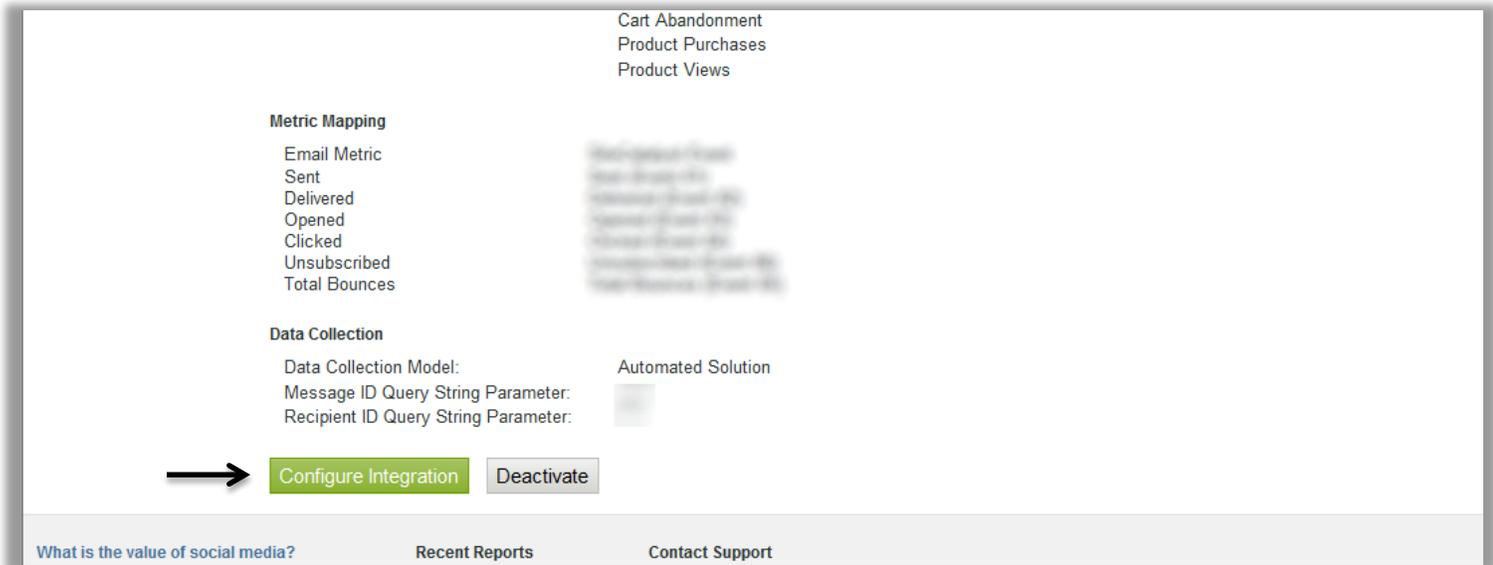
10. You should now be able to see the segment that you just created under the “**Available Segments**” section as shown.



11. Go back to Genesis and select the CheetahMail integration (for the above Report Suite). Select the “**Configure**” tab

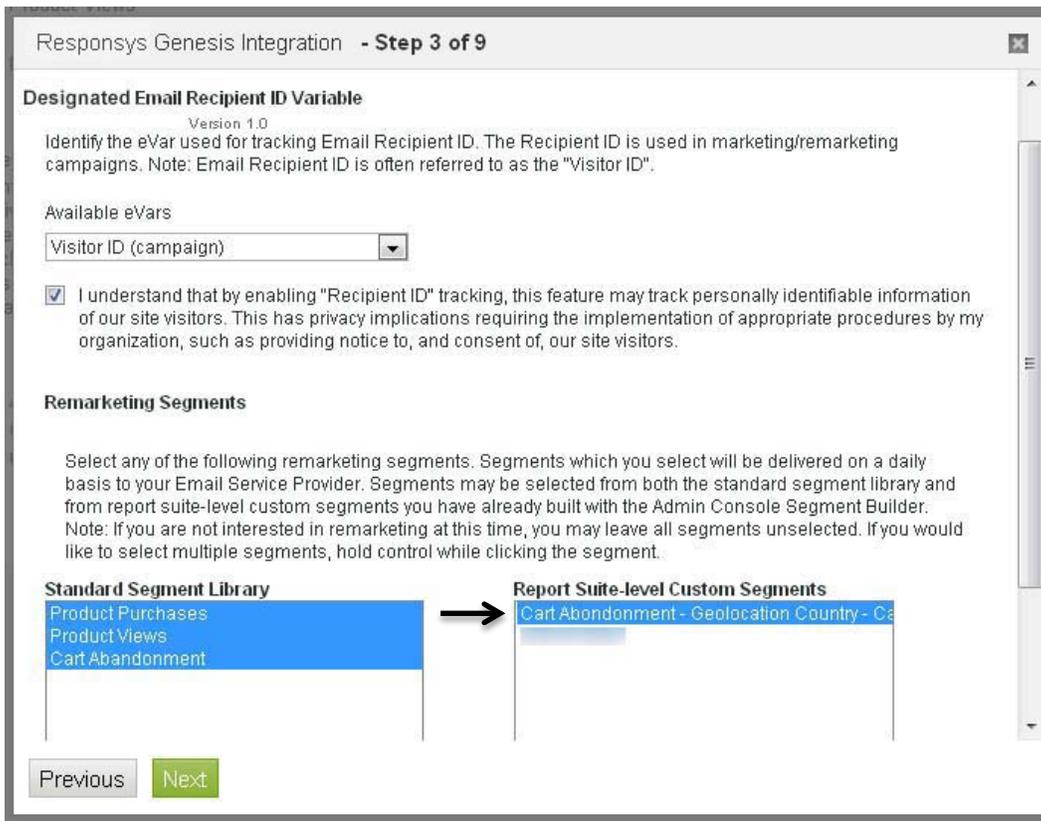


12. Scroll down and click on “**Configure Integration**”.



13. This brings the Integration configuration window which will have the same information that you had previously entered/selected during integration. Keep clicking “**Next**” until you reach **step 3 of 9**.

14. You should now be able to see the custom segment that you just created under “**Report Suite-level Custom Segments**”. Select the segment you want to include and click “**Next**”.



15. You don't need to reselect the dashboards. Verify the details and click **"Save"**.

Appendix B – The JavaScript Plugin Code

Install the SiteCatalyst plug-in below (simply copy these few lines of code and add them to the SiteCatalyst code on your pages). This plug-in will enable SiteCatalyst to identify and capture incoming traffic resulting from CheetahMail-produced e-mail campaigns appropriately.

NOTE: This code should be used only if you selected the JavaScript Plugin method for data collection during integration. You can always reconfigure the integration to select the **Automatic** mode of data collection.

```
/*
 * Plugin: getQueryParam 2.3
 */
s.getQueryParam=new Function("p","d","u",""
+"var s=this,v='',i,t;d=d?d:'';u=u?u:(s.pageURL?s.pageURL:s.wd.locati"
+"on);if(u=='f')u=s.gtfs().location;while(p){i=p.indexOf(',');i=i<0?p"
+".length:i;t=s.p_gpv(p.substring(0,i),u+'');if(t){t=t.indexOf('#')>-"
+"1?t.substring(0,t.indexOf('#')):t;}if(t)v+=v?d+t:t;p=p.substring(i="
+"=p.length?i:i+1)}return v");
s.p_gpv=new Function("k","u",""
+"var s=this,v='',i=u.indexOf('?'),q;if(k&&i>-1){q=u.substring(i+1);v"
+"=s.pt(q,'&','p_gvf',k)}return v");
s.p_gvf=new Function("t","k",""
+"if(t){var s=this,i=t.indexOf('='),p=i<0?t:t.substring(0,i),v=i<0?'T"
+"rue':t.substring(i+1);if(p.toLowerCase()==k.toLowerCase())return s."
+"epa(v)}return ''");

/*in the s_doPlugins function

s.campaign=s.getQueryParam("MID"); //places query param value from mid in
campaign variable
s.eVar2=s.getQueryParam("RID"); //places query param value from rid in eVar2
variable
```

Change eVar2 (marked in red) to appropriate eVar which was allocated to Recipient ID during integration setup. The campaign variable (marked in blue) changes to appropriate eVar as well, unless campaign tacking code was allocated to Message ID during integration setup.

NOTE: The plugin above assumes certain Custom Commerce Variables (eVars) are available. If the variables specified in the plugin above are not available within your SiteCatalyst deployment, simply replace them with those that are available. Replace the query string parameters (marked in green) with the one you use. Consult with Experian team to get the correct query string parameter.

Disclaimer: The code above is a sample for the purpose of this guide. Please do test this code before deploying it in production environment. [Contact your Adobe consultant](#) for further details on the latest plugin code.