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Triggers User Guide

v05

Table of Contents

Overview of Triggers	5
In-session triggers	5
Daily triggers	6
Setting up a Triggers campaign	7
Setting up an ESP connection in Episerver	7
Setting up an ESP action in Episerver	9
Creating a new trigger campaign in Episerver	10
Managing trigger campaigns in Episerver	13
Global contact frequency	14
Edit – Status – Delete	14
Prioritizing trigger campaigns	14
Setting up a Mail campaign in Episerver	15
Triggers reporting in Episerver	18

Overview of Triggers

Triggers lets you send automated personalized emails via an Email Service Provider (ESP) that are triggered by the on-site actions of the email recipient. These actions typically alert the user of a price reduction or some form of abandonment. Because Episerver captures all user behavior, you also can use this behavior to include alternative recommendations to abandoned or browsed products.

Triggers has several preset triggers:

- » **Abandoned checkout**
- » **Abandoned basket**
- » **Abandoned browse**
- » **Targeted discounts**
- » **High product interest**
- » **Post purchase**
- » **Low-in-stock abandoned-basket.**

See the [In-session triggers](#) section for a list of available triggers and their descriptions. New options are constantly being added, so contact your Episerver Account Manager about what is available and for any specific requirements you may have.

To enable Triggers functionality, set up the configuration in the Episerver Personalization Portal so that Episerver and the ESP platform can communicate with each other to send the right message at the right time; see [Setting up an ESP connection in Episerver](#).



Note: The configuration is different for each Email Service Provider. Episerver Triggers can work with any ESP, so you can migrate Triggers and Mail to any provider that you might select.

By using Triggers alone, you can add users automatically to an email list/group and further refine the recipient list using automation programs available in your ESP account, or you can trigger an email to be sent out by your ESP right away. When combined with Mail, you have the power to include specific products that are of interest to the user—their browsed and abandoned products and recommendations based on their on-site behavior.

In-session triggers

In-session triggers can fire during each user's individual session as soon as the trigger criteria are met. Each in-session trigger has a wait time, which specifies how much time the visitor must be inactive for before the trigger can fire.

In-session triggers	Description
Abandoned checkout	Fires when a user enters the checkout flow but does not complete the purchase.
Abandoned basket	Fires when a user adds an item to the basket but does not purchase it.
Abandoned browse	Fires when a user visits a product page on the site but leaves the site without adding anything to the basket.
Additional trigger actions	Fires when a user navigates to a specific page a chosen number of times. For example, a user visits a particular section of the site and views more than 5 pages in a category but does not purchase. Can be used alone or combined with another in-session trigger.

Daily triggers

Daily triggers are scheduled for analysis each day at a specific time.

Daily triggers	Description
Targeted discounts	Fires when a product the user has viewed but not purchased in the past 30 days has decreased in price. Analysis runs as soon as the product feed is imported. Can be combined with a Mail campaign to show the discounted products in the email sent.
High product interest	Fires when a user has visited the same product multiple times without purchasing it in the last 30 days. It counts how many unique days the product page has been viewed in the last 30 days. Duration of each view is not considered. Analysis runs at 01:00 UK time. Can be combined with a Mail campaign to show the viewed products in the email sent.
Post-purchase	Fires a specified number of days after an order is placed. Can be combined with a Mail campaign to show the purchased products in the email sent. Analysis runs at 01:00 UK time.
Low-in-stock abandoned-basket	Fires when a product the user has added to their basket in

Daily triggers	Description
	the last 14 days, but not purchased, is getting low in stock. The basket is considered abandoned after 4 hours of inactivity. Upper and lower thresholds of stock availability need to be specified. Analysis runs as soon as the product feed is imported. Can be combined with a Mail campaign to show the relevant products in the email sent.

Setting up a Triggers campaign

Set up a Triggers campaign in the Personalization Portal. Each trigger campaign needs to have an associated ESP connection and ESP action. Set up the ESP connection and the ESP action once, and these can act on all of your trigger campaigns.

Setting up an ESP connection in Episerver

Episerver needs to connect to the ESP's API so that when the trigger is fired, Episerver can alert the ESP to perform an action.

8 | Triggers

1. To set up the connection, go to **Triggers** in your Personalization Portal account.
2. Select the **New campaign** tab and then click **ESP connections** in the top right.

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there is a navigation bar with 'Reports', 'Merchandising', 'Mail', and 'Triggers' (selected), and an 'Account' button. Below this, there are tabs for 'Campaigns' and 'New campaign'. A notification says 'Set up a connection to your...'. The main form is titled 'Configure your Trigger campaign' and includes the following fields and sections:

- Campaign name:** A text input field with a lock icon.
- ESP action:** A dropdown menu currently set to 'Please select'. A red message below it says 'Please provide an ESP Action for this Trigger.'
- Contact frequency:** A toggle switch currently set to 'Off'.
- Start date:** A date picker set to '02/10/2017'.
- End date:** A date picker.
- How many minutes to wait:** A text input field.
- In-session triggers:** A list of checkboxes for 'Abandoned checkout', 'Abandoned basket', and 'Abandoned browse'.
- Daily triggers:** A list of checkboxes for 'Targeted discounts (last 30 days)', 'High product interest (last 30 days)' (with a 'Viewings:' input), 'Post purchase' (with a 'Days since order:' input), and 'Low-in-stock abandoned-basket' (with 'Stock upper threshold:' and 'Stock lower threshold:' inputs).
- Additional trigger actions:** A list of checkboxes for 'Home page', 'Category page', 'Product page', 'Basket page', 'Order page', and 'Specific page', each with a 'Viewings:' input. Below this is a text input for 'Enter the URL or a partial URL'.

At the bottom right, there are two buttons: 'Save campaign' (with a checkmark) and 'Cancel'. The footer contains '© 2017 Episerver'. The 'ESP connections' link in the top right is circled in red.

3. Edit an existing connection or create a new one. To create a new connection, click **Add an ESP connection**. The Manage your ESP connections screen appears.

Configure your Trigger campaign

Manage your ESP connections + Add an ESP connection

Connection name: Name of ESP:

ESP username: ESP realm:

ESP password:

4. To create a connection:
 - a. Enter your API credentials for your ESP account (such as username, password, database, realm, API token).
 - b. Click **Test ESP connection** to test the connection.
 - c. Click **Save ESP connection**.
 - d. Click **On** to activate the connection.

ESP connection name	Email Service Provider	ESP username	ESP realm	Edit - Delete - Status
Terradata Connection	Teradata	Execute@api.com	Http://peerius.cust-mta.com	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input checked="" type="checkbox" value="On"/>

Setting up an ESP action in Episerver


1. To set up the action, go to **Triggers** in your Personalization Portal account and open a new or existing campaign.
2. Click **ESP actions**. You can either edit an existing ESP action or create a new one. Make sure it uses the connection that you require, for example, the one you created or edited in [Setting up an ESP connection in Episerver](#).

Configure your Trigger campaign

Manage your ESP actions + Add an ESP action

ESP action name	ESP connection name	ESP action type	Edit - Delete
-----------------	---------------------	-----------------	---------------

3. Choose your preferred **ESP action type** from the available options and enter the required details (such as **Group ID**, **List ID**, **Message ID**, **Database**); the values of which are available from your ESP portal.

 **Note:** These fields are dynamic and will differ depending on the chosen **ESP connection** and the chosen **ESP action type**.

Campaigns **New campaign**

Configure your Trigger campaign ESP actions ESP connections

Manage your ESP actions + Add an ESP action

ESP action name: ESP connection:

ESP action type: Add user to group
 Remove user from group
 Send message


Group ID:

Test ESP action

Cancel Save ESP action

Available action types are as follows:

- » **Add user to group (preferred).** A fired trigger tells the ESP to add a user's email address to the email group or list with the specified Group ID or List ID. If there are ESP-level triggers on the list, these may be activated by this step. This action just adds a user's email addresses to a list; it does not send those users any emails.
- » **Remove user from group.** Removes a user's email address from the group or list.
- » **Send message.** A fired trigger tells the ESP to send the message with the specified **Message ID** to the user.

 **Warning:** This does not check whether the user has opted in to the emailing scheme, so should be used with caution.

4. After you created your ESP action, test it and save it. You can click **ESP action** again to close the action configuration section. The fields for configuring a new trigger appear.

Creating a new trigger campaign in Episerver

Go to **Triggers** in your Personalization Portal account. To create a new trigger campaign, click on the **New campaign** tab and fill out the form as follows:

1. Enter a name for your Triggers campaign, such as *Abandoned baskets*.
2. Select an **ESP action** so that the trigger performs the desired action when it fires.
3. Optionally, specify start and end dates for the campaign.
4. Set **Contact Frequency** to **On** if you want to limit the number of emails a customer may receive from this campaign.

- If you have turned the **Contact Frequency** on, specify the maximum number of emails that can be sent to each user by this campaign per day, per week, or per month.



Note: The **Global contact frequency** could stop emails being sent if its limit is reached first.

- Select the type of trigger this campaign should use. See [In-session triggers](#) and [Daily triggers](#) for information.
 - » For **In-session triggers**, specify how long the visitor needs to be inactive for on your site before the trigger can fire.
 - » Unless stated otherwise, **Daily triggers** monitor the last 30 days of data. As soon as the trigger criteria are satisfied, the trigger fires.
 - » You can use **Additional trigger actions** alone or in combination with an **In-session trigger**.
 - » You can specify whether the customer must have visited a certain page type a specified number of times.
 - » You can specify a URL (or a keyword from a URL) from your site that the customer must have visited.



Note: The order of additional trigger actions does not matter.



Note: To add a criterion, where the user must have NOT visited a certain page type or URL, you can enter the number of viewings as 0 (zero).

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there are tabs for 'Campaigns' and 'New campaign'. The main form is divided into several sections:

- Campaign name:** A text input field containing 'Abandoned baskets'.
- Contact frequency:** A dropdown menu set to 'Off'.
- How many minutes to wait:** An empty text input field.
- ESP action:** A dropdown menu with 'Abandoned basket' selected. Below it, there is a 'Please select' message, an 'Add an ESP action' button, and a list of available actions including 'Abandoned basket'.
- Start date:** A date picker set to '04/10/2017'.
- End date:** An empty date picker.
- In-session triggers:** A list of checkboxes: 'Abandoned checkout', 'Abandoned basket' (checked), and 'Abandoned browse'.
- Daily triggers:** A list of checkboxes: 'Targeted discounts (last 30 days)', 'High product interest (last 30 days)' (with a 'Viewings:' input field), 'Post purchase' (with a 'Days since order:' input field), and 'Low-in-stock abandoned-basket' (with 'Stock upper threshold:' and 'Stock lower threshold:' input fields).

- Click **Save campaign** when you have completed your specifications.

8. The initial state of a newly created trigger is **OFF**. To activate it, go to the **Campaigns** overview page and click the play button (▶) next to the campaign name.

In the following example, the new trigger campaign specifies the following:

- » Any customer receives no more than 1 email per day from this trigger campaign, and no more than 3 emails per week, and no more than 8 emails per month (whichever limit is reached first).
- » The customer must have abandoned their basket, (that is, placed at least one item in the basket and not completed the order), after being inactive for (in this case) 45 minutes.
- » The customer must have visited a category page at least once. (You can specify 0 if you want the user to not have visited this type of page.)
- » You also can add a specific URL match. In this case, the user must have visited a page with the string **promo123** somewhere in the URL.
- » If all these criteria are satisfied, the trigger fires (unless prevented by the **Global contact frequency** restriction).

Configure your Trigger campaign Abandoned basket

ESP actions ESP connections

Campaign name: Abandoned basket ESP action: Abandoned basket Start date: 04/10/2017

Contact frequency: On 1 per day 3 per week 8 per month End date:

How many minutes to wait: 45

In-session triggers

- Abandoned checkout
- Abandoned basket
- Abandoned browse

Daily triggers

- Targeted discounts (last 30 days)
- High product interest (last 30 days) Viewings:
- Post purchase Days since order:
- Low-in-stock abandoned-basket Stock upper threshold:
Stock lower threshold:

Additional trigger actions

- Home page Viewings:
- Category page Viewings: 1
- Product page Viewings:
- Basket page Viewings:
- Order page Viewings:
- Specific page Viewings: 1
promo123
- Specific page Viewings:
Enter the URL or a partial URL

Save campaign Cancel

Managing trigger campaigns in Episerver

Go to **Triggers** in your Personalization Portal account and select the **Campaigns** tab.

This page allows you to do the following:

- >> Set a Global contact frequency.
- >> Edit a campaign.
- >> Activate/deactivate a campaign.
- >> Delete a campaign.

» Prioritize trigger campaigns.

The screenshot shows the 'Campaigns' configuration page. At the top, there are tabs for 'Campaigns' and 'New campaign'. Below the tabs, there is a 'Configure your Trigger campaign' section with a 'Create a new campaign' button. Underneath, there are settings for 'Global contact frequency' with a toggle set to 'On' and three buttons for frequency: '5 per day', '20 per week', and '50 per month'. Below these settings is a table with the following columns: Priority, Campaign name, ESP action name, Time to wait, Monitoring period, Contact frequency, and Edit - Status - Delete.

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Abandoned basket	Abandoned basket	0 minutes	in session	Off	[Edit] [Status] [Delete]
2	Abandoned browse	Abandoned browse	0 minutes	in session	Off	[Edit] [Status] [Delete]
3	Abandoned checkout	Abandoned checkout	1 minutes	in session	Off	[Edit] [Status] [Delete]

Global contact frequency

The **Global contact frequency** limits the firing of triggers from all the campaigns listed on the page. That is, for all campaigns combined, you can specify the maximum number of triggered emails that can be sent to any one customer.



Note: An individual campaign's **Contact frequency** could stop emails being sent for that campaign if its limit is reached first.

Edit – Status – Delete

- » **Edit.** Click **Edit** (✎) or on a campaign name opens the configuration page for that campaign so you can edit it.
- » **Status.** Click **Activate it** (▶) to switch on a campaign or **Pause it** (||) to switch off a campaign. The initial state of a newly created trigger is paused.
- » **Delete.** Click **Delete** (🗑) for a campaign deletes that campaign.

Prioritizing trigger campaigns

On the **Campaigns** page, you can sort your trigger campaigns in the order you want for them to be fired, with those at the top of the table having the highest priority, and those at the bottom the lowest. This order is especially important if you restrict the number of emails that any one customer may receive (by defining a [Global contact frequency](#)).

After a campaign's trigger fires, only the trigger from a campaign higher up in the table can fire that day (if it does not exceed the **Global contact frequency**). So, in the table of trigger campaigns in the

Personalization Portal, if one of the triggers fires, any trigger below it in the list is prevented from firing that day (resets at 00:00 UK time). The same trigger can fire more than once.

To re-order the priority of your trigger campaigns click on the button (⋮) to the left of a campaign's name in the **Priority** column, and drag the campaign to the desired position in the table.

Configure your Trigger campaign Create a new campaign

Global contact frequency: On 2 per day 14 per week 42 per month

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Abandoned checkout	Abandoned checkout	30 minutes	in session	Off	
2	Abandoned basket	Abandoned basket	45 minutes	in session	1 per day 3 per week 8 per month	
3	Abandoned browse	Abandoned browse	80 minutes	in session	2 per day 10 per week 35 per month	

Setting up a Mail campaign in Episerver

You can create a Mail campaign with the triggers you set to return abandoned or personalized products in the email. For information about creating a Mail campaign, see the *Episerver Mail User Guide*.

In the Episerver Personalization Portal, select the **Mail > New campaign** tab and follow the steps.

1. **Style editor.** Create the front-end styling of the abandoned or recommended products that will be displayed in the email.
2. **Configuration.** Set up the email widget. Currently, there are four trigger strategies available:
 - » **Products from daily trigger campaigns.** Returns the products from your daily trigger campaign, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned basket.
 - » **Products from in-session trigger campaigns.** Returns the abandoned products from your in-session trigger campaign, such as Abandoned basket, Abandoned browse, Abandoned checkout.
 - » **Recommendations based on daily trigger campaigns.** Returns related products based on the trigger used, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned basket.
 - » **Recommendations based on in-session trigger campaigns.** Returns related products based on the trigger used, such as Abandoned basket, browse or checkout, for the

current session.

The screenshot shows the 'Configure your campaign' interface for an 'Abandoned basket' campaign. The interface is divided into three steps: 1. Style editor, 2. Configuration, and 3. HTML and preview. The 'Configuration' step is active. It includes 'Widget setup' (Number of products: 3, Locale: en-gb, No repeat: 0) and 'Tracking' (Tracking code field, Use top-ups checkbox). Below are three product configuration panels for 'Product 1', 'Product 2', and 'Product 3'. 'Product 1' has a 'trigger' field and a list of strategy options, with 'Products from in-session trigger campaigns' selected. 'Product 2' and 'Product 3' have 'Please click here to select' fields and 'Fallback product set' and 'Search product set' fields. At the bottom right are 'Save campaign' and 'Cancel' buttons.

3. **HTML and Preview.** Generate the code to copy and insert into your email template later, and to preview the email content. Select the correct ESP in the **Email service provider** drop-down menu, so the correct placeholders are automatically populated in the generated code. You will need to insert this code in the email template created in your ESP account.

Campaigns Configuration Product sets Customise email attributes

Configure your campaign: Abandoned basket Create a new campaign

1. Style editor 2. Configuration 3. HTML and preview

Generate HTML code

Email service provider: Custom

Variables

Email address: Trigger fire ID:

<%user.Email%> <%user.CustomAttrit

```

<!-- recommendation link and image for recommendation #2 -->
<a href="https://something.com/tracker/er/link.page?e=
<user.Email%&site=clientsite&wid=12345&rno=1&triggerFireId=<user.CustomAttribute.triggerFireId%>"></a>

<!-- product information link and image for recommendation #2 -->
<a href="https://something.com/tracker/er/link.page?e=
<user.Email%&site=clientsite&wid=12345&rno=1&triggerFireId=<user.CustomAttribute.triggerFireId%>"></a>
<!-- RECOMMENDATION #3 -->
<!-- recommendation link and image for recommendation #3 -->
<a href="https://something.com/tracker/er/link.page?e=
<user.Email%&site=clientsite&wid=12345&rno=2&triggerFireId=<user.CustomAttribute.triggerFireId%>"></a>

<!-- product information link and image for recommendation #3 -->
<a href="https://something.com/tracker/er/link.page?e=
<user.Email%&site=clientsite&wid=12345&rno=2&triggerFireId=<user.CustomAttribute.triggerFireId%>"></a>

```

Generate code

Preview or send a test email

you@yourcompany.com

Preview email

Save campaign Cancel

Preview or send a test email

you@yourcompany.com

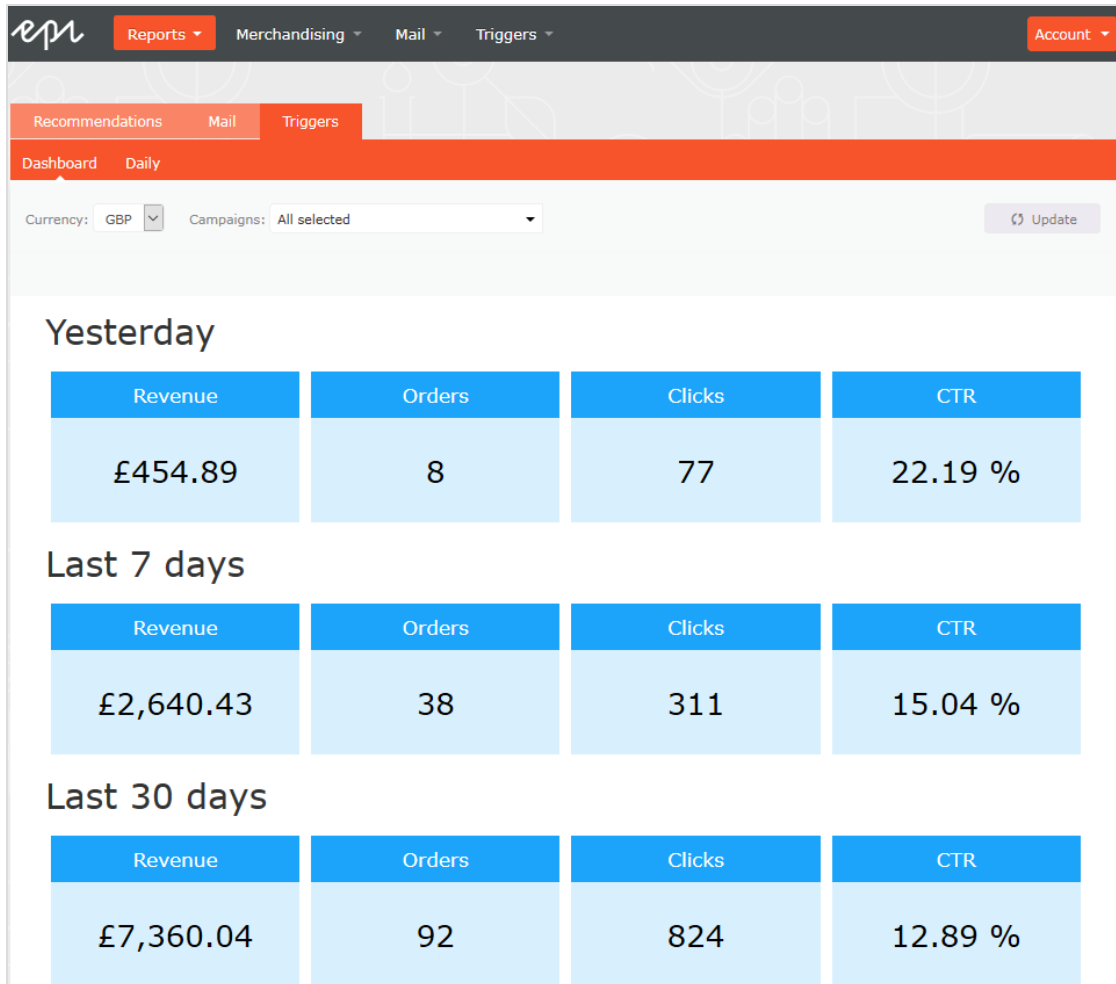
Preview email

Hello,
This is an example of what the Episerver recommendations widget will look like in an email.

Detailed information

Triggers reporting in Episerver

In the reporting section in the Personalization Portal, a Triggers dashboard shows the revenue, orders, clicks, and click-through-rate for your trigger campaigns.



Also, there is a daily report that shows how many website sessions fired a trigger, how many triggered emails were viewed, and how many products were purchased through a Episerver-generated link from those emails. This is reported for each trigger and broken down to daily reporting.

Name	Date	Fired	Impressions	Clicks	Orders	Revenue
Total:		11351	6,460	836	92	£7,244.99
Abandoned basket	-	2397	1,286	180	25	£1,793.45
Abandoned browse	-	7277	4,126	508	31	£2,303.96
Abandoned checkout	-	1677	1,048	148	36	£3,147.58
Total:		11351	6,460	836	92	£7,244.99

If you have any questions regarding Triggers, contact your Episerver Customer Success Manager or email developersupport@episerver.com.