



© EpiServer 2018

Triggers User Guide Personalization Portal - EpiServer Reach

v05

Table of Contents

Overview of Triggers	5
Types of triggers	6
Daily triggers	6
In-session triggers	6
Setting up a Trigger campaign	8
Setting up an ESP connection	8
Setting up an ESP action	10
Creating a new trigger campaign	12
Managing Trigger campaigns	14
Global contact frequency	14
Edit – Status – Delete	15
Prioritizing trigger campaigns	15
Setting up a Mail campaign	16
Triggers reporting in Episerver	20

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.

You have the following preset triggers available:

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

See the [Types of triggers](#) section for a list of available triggers and their descriptions. New options are constantly being added, so contact your Episerver Customer Success 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](#).



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.

Types of triggers

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 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.

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.

Setting up a Trigger campaign

Set up a Trigger 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

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.

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.

© 2017 Episerver

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.

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there are tabs for 'Campaigns' and 'New campaign'. Below this, the main heading is 'Configure your Trigger campaign'. On the right side, there are links for 'ESP actions' and 'ESP connections'. The main section is titled 'Manage your ESP connections' and includes a '+ Add an ESP connection' button. The form contains the following fields:

- Connection name: My ESP connection
- Name of ESP: My ESP (dropdown menu)
- ESP username: John.Doe@example.com
- ESP realm: http://My-ESP-realm.com
- ESP password: [masked with dots]

 There is an 'On' toggle switch to the right of the 'Name of ESP' field. At the bottom right, there are buttons for 'Test ESP connection' and 'Save ESP connection', along with a 'Cancel' button.

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**.

Setting up an ESP action

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](#).

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there are tabs for 'Campaigns' and 'New campaign'. Below this, the main heading is 'Configure your Trigger campaign'. On the right side, there are links for 'ESP actions' and 'ESP connections'. The 'ESP actions' link is circled in red. Below this, the main section is titled 'Manage your ESP actions' and includes a '+ Add an ESP action' button. At the bottom, there is a table header with the following columns:

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

3. To create a new action, click **Add an ESP action**.
4. 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:



Depending on the features supported by your ESP platform, some of these actions may not be available for your chosen connection.

- » **Add user to group.** 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: Depending on your ESP, **Send message** may not check whether the user has opted in to the emailing scheme, so should be used with caution.

5. After you created your ESP action, test it and save it.

Creating a new trigger campaign

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 Trigger campaign, such as *Abandoned basket*.
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 times a trigger can fire for each customer from this campaign.

If you have turned the **Contact frequency** on, specify the maximum number of times that the trigger can be fired for each user by this campaign per day, per week, or per month.



Note: The **Global contact frequency** will stop all triggers from firing if its limit is reached first.

5. Select the type of trigger this campaign should use. See [Types of 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).

6. Click **Save campaign** when you have completed your specifications.
7. 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:

- » For any customer, the trigger will fire no more than 1 time per day, and no more than 3 times per week, and no more than 8 times 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) 30 minutes.
- » The customer must have visited a category page at least once.
- » 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 Targeted discounts campa ▾

ESP actions ESP connections

Campaign name: Targeted discounts campaign ESP action: My add to group ac ▾ Start date: 04/11/2017 📅

Contact frequency: **On** 1 per day 5 per week 8 per month End date: 📅

How many minutes to wait: 30

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

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.

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Targeted discounts campaign	My add to group action	30 minutes	in session	1 per day 5 per week 8 per month	[Edit] [Play] [Delete]
2	Abandoned checkout	Send message action	30 minutes	in session	Off	[Edit] [Play] [Delete]
3	Abandoned basket	My add to group action	45 minutes	in session	1 per day 3 per week 8 per month	[Edit] [Pause] [Delete]
4	Abandoned browse	Remove user	80 minutes	in session	2 per day 10 per week 35 per month	[Edit] [Pause] [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 triggers that can be fired for any one customer.

Global contact frequency: On per day per week per month



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

Edit – Status – Delete

- » **Edit.** Click **Edit** (✎) or on a campaign name to open 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** (🗑) to delete a campaign. A confirmation box appears.

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 times triggers can fire for any one customer (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.

The screenshot shows the 'Campaigns' configuration page. At the top, there are tabs for 'Campaigns' and 'New campaign', and a 'Create a new campaign' button. Below this is the 'Global contact frequency' section, which is currently set to 'On' and includes buttons for '2 per day', '14 per week', and '42 per month'. The main part of the page is a table with the following columns: Priority, Campaign name, ESP action name, Time to wait, Monitoring period, Contact frequency, and Edit - Status - Delete. The table contains four rows of campaigns. The third row, 'Abandoned basket', is highlighted in blue, and its priority icon (⋮) is circled in red. The footer of the page shows '© 2017 Episerver'.

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Targeted discounts campaign	My add to group action	30 minutes	in session	1 per day 5 per week 8 per month	✎ ▶ 🗑
2	Abandoned checkout	Send message action	30 minutes	in session	Off	✎ ▶ 🗑
3	Abandoned basket	My add to group action	45 minutes	in session	1 per day 3 per week 8 per month	✎ 🗑
4	Abandoned browse	Remove user	80 minutes	in session	4 per day 10 per week 35 per month	✎ 🗑

Setting up a Mail campaign

You can create a Mail campaign to return abandoned or personalized product recommendations in the email template that is sent to users for whom a trigger was fired. 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 styling for the product information image of the abandoned or recommended products that will be displayed in the email.
2. **Configuration.** Select how many products you want to appear in the email campaign, specify localization settings, add third-party tracking code, and configure recommendation strategies. You have the following trigger-specific Mail 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 tabs: Campaigns, Configuration (active), Product sets, and Customise email attributes. Below the tabs, there are sections for 'Widget setup' (Number of products: 3, Locale: en-gb, No repeat: 0) and 'Tracking' (Tracking code field, Use top-ups checkbox). The main area shows three product configuration panels for 'Product 1', 'Product 2', and 'Product 3'. Product 1's 'Strategy' dropdown is open, showing options like 'Products from in-session trigger campaigns'. At the bottom, there are 'Save campaign' and 'Cancel' buttons.

3. **HTML and preview.** Generate the code to copy and insert into your email template later, and preview the output of your Mail campaign. Select the correct ESP in the **Email service provider** drop-down menu, so that the correct placeholders are automatically populated in the variables fields. Click **Generate code**. You will need to insert the generated HTML code into the email template in your ESP account.

epis Reports Merchandising Mail Triggers Account

Campaigns New campaign Product sets Customise email attributes

Configure your Mail campaign Create a new campaign

Style editor Configuration **HTML and preview**

Generate HTML code

Email service provider:

Variables

Email address: Trigger fire ID:

```
<!-- RECOMMENDATION #1 -->
<!-- recommendation link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4f5&rno=0&triggerFireId={externaltriggerid}"></a>
<!-- product information link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4f5&rno=0&triggerFireId={externaltriggerid}"></a>


<!-- RECOMMENDATION #2 -->
<!-- recommendation link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4f5&rno=1&triggerFireId={externaltriggerid}"></a>
<!-- product information link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4f5&rno=1&triggerFireId={externaltriggerid}"></a>
```


Preview or send a test email

© 2017 Episerver

Preview or send a test email

joe.sample@example.com

 Preview email

 Send test email

Hello,

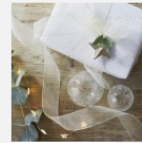
This is an example of what the Episerver recommendations widget will look like in an email.



**Valencia Bed
Linen
Collection**
£ 15.00




**Savoy Bed
Linen
Collection**
£ 25.00



**Wired Gold
Ribbon – 5m**
£ 6.00

[Detailed information](#)

 Save campaign

Cancel

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.

The screenshot shows the Episerver Triggers reporting dashboard. The interface includes a top navigation bar with 'Reports', 'Merchandising', 'Mail', and 'Triggers' menus, and an 'Account' link. Below the navigation, there are tabs for 'Recommendations', 'Mail', and 'Triggers'. The 'Triggers' tab is active, showing a 'Dashboard' and 'Daily' sub-tab. The dashboard includes a currency selector set to 'GBP' and a 'Campaigns' dropdown set to 'All selected'. The main content area displays three summary tables for 'Yesterday', 'Last 7 days', and 'Last 30 days', each with columns for Revenue, Orders, Clicks, and CTR.

Yesterday			
Revenue	Orders	Clicks	CTR
£454.89	8	77	22.19 %

Last 7 days			
Revenue	Orders	Clicks	CTR
£2,640.43	38	311	15.04 %

Last 30 days			
Revenue	Orders	Clicks	CTR
£7,360.04	92	824	12.89 %

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.

The screenshot shows the Episerver Triggers dashboard. At the top, there is a navigation bar with 'Reports', 'Merchandising', 'Mail', and 'Triggers' menus, and an 'Account' button. Below this, there are tabs for 'Recommendations', 'Mail', and 'Triggers'. The 'Triggers' tab is active, showing a sub-menu with 'Dashboard' and 'Daily'. The dashboard includes a 'Time range' selector set to 'Month' for the period '05-09-2017 - 05-10-2017', a 'Currency' dropdown set to 'GBP', and buttons for 'Export CSV' and 'Update'.

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.