Digital Experience Cloud

Episerver Reach

User Guide

© Episerver 2019

Episerver Reach User Guide 19-1

Table of contents

© Episerver 2019

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 frequently 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 Episerverfor the 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 or 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 visitor 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 visitor has visited the same product multiple times without purchasing it in the last 30 days. It counts how many unique days the product page was 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 visitor added to their basket in the last 14 days, but not purchased, is 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 visitor'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.

© Episerver 2019

In-session triggers	Description
Abandoned checkout	Fires when a visitor enters the checkout flow but does not complete the purchase.
Abandoned basket	Fires when a visitor adds an item to the basket but does not purchase it.
Abandoned browse	Fires when a visitor visits a product page on the site but leaves the site without adding anything to the basket.
Additional trigger actions	Fires when a visitor navigates to a specific page a chosen number of times. For example, a visitor 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.

© Episerver 2019

Setting up a Trigger campaign

Each Trigger campaign must 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.

Linking to a specific basket

Episerver can integrate links from an email recommendation to a particular basket of the recipient. To enable this feature, contact customer service.

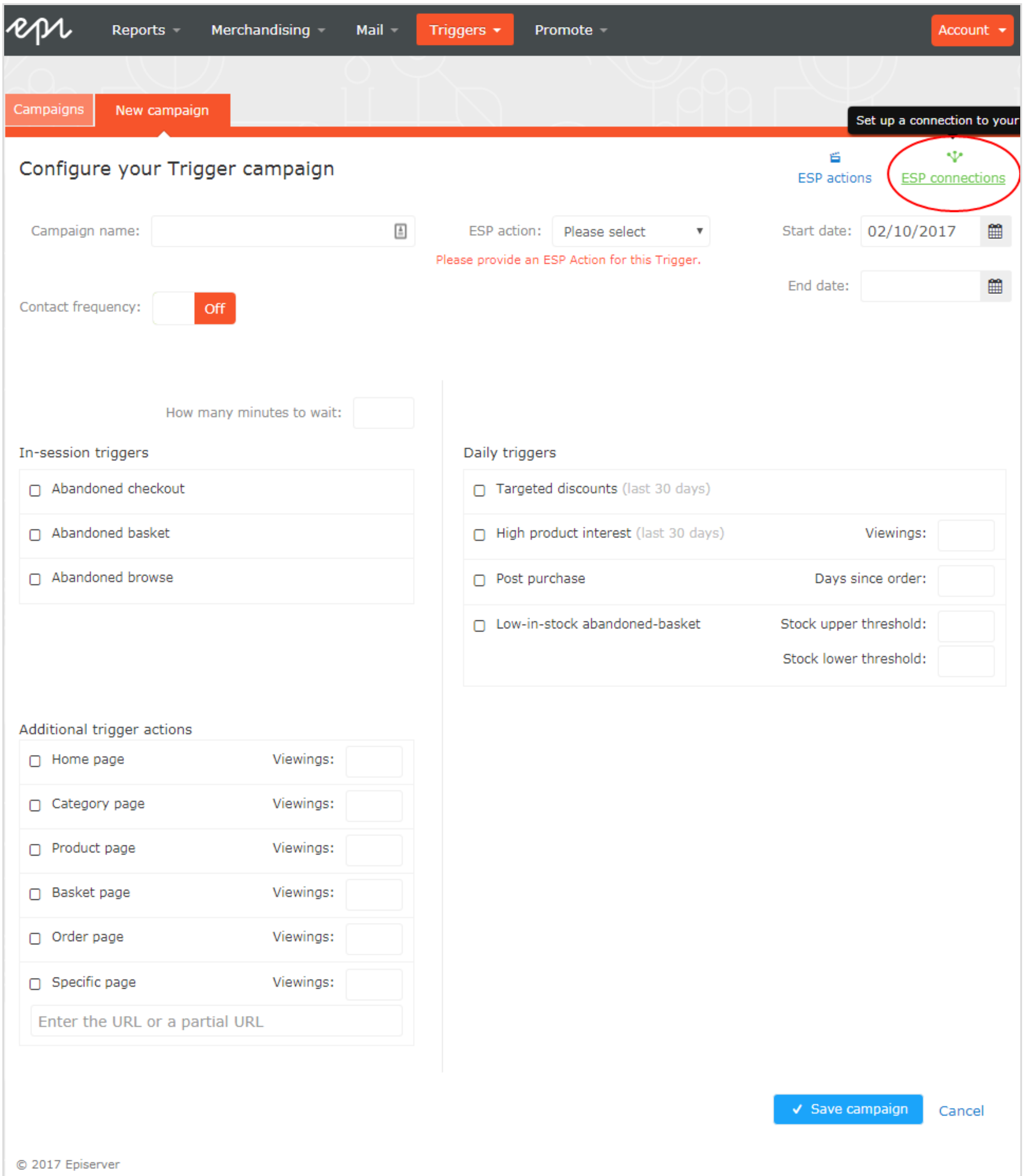
For developer information, see Link to a specific basket on Episerver World.

Setting up an ESP connection

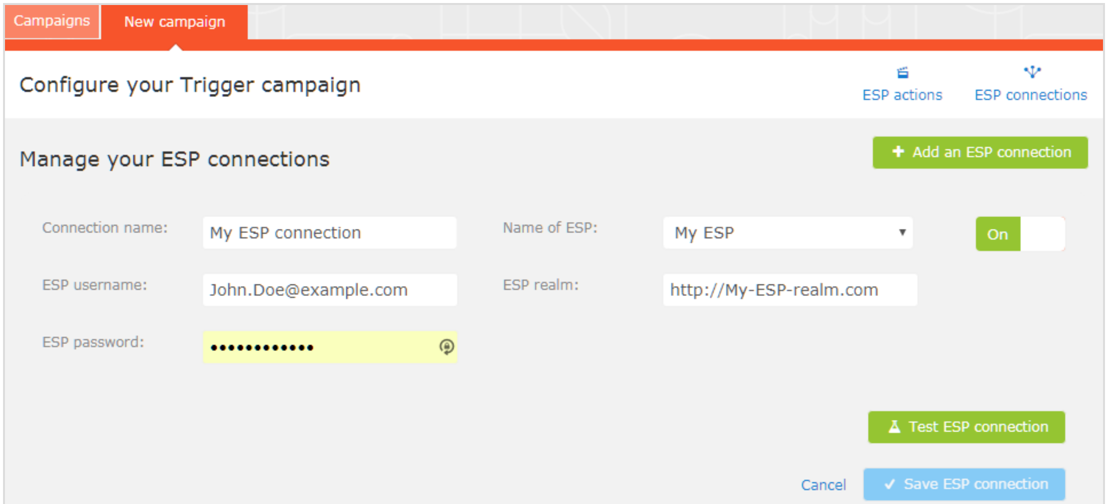
Episerver must connect to the ESP's API so that when the trigger is fired, Episerver can alert the ESP to perform an action.

© Episerver 2019

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



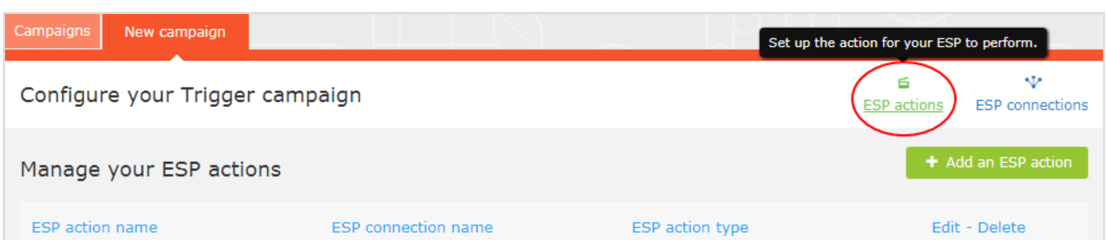
3. Edit an existing connection or create a new one. To create a new connection, click **Add an ESP connection**. The Manage your ESP connections screen appears.



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**.

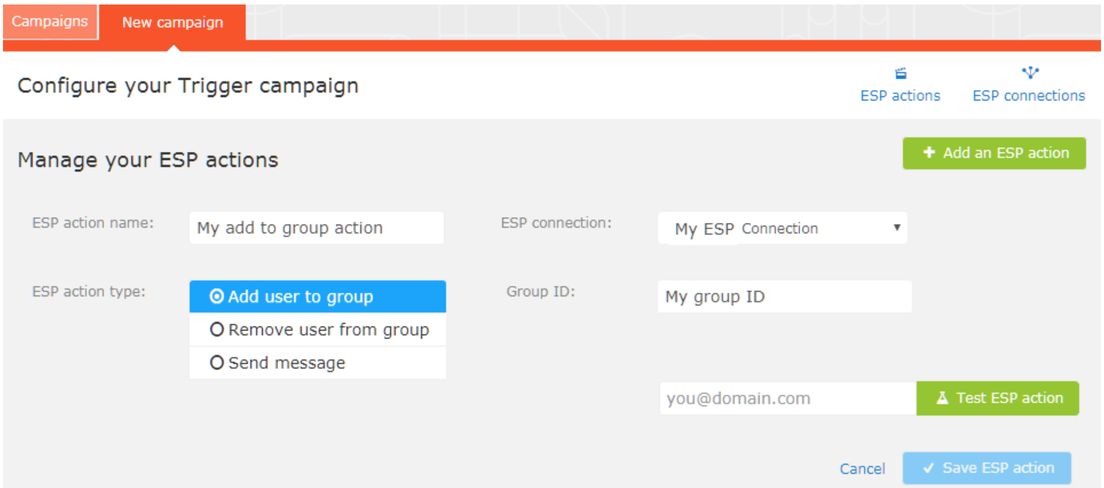
Setting up an ESP action

1. To set up the action, go to **Triggers** in your for the 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.



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**.



Available action types are as follows:

> **Note:** 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 for the 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 triggers 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** stops 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 (in minutes) 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.

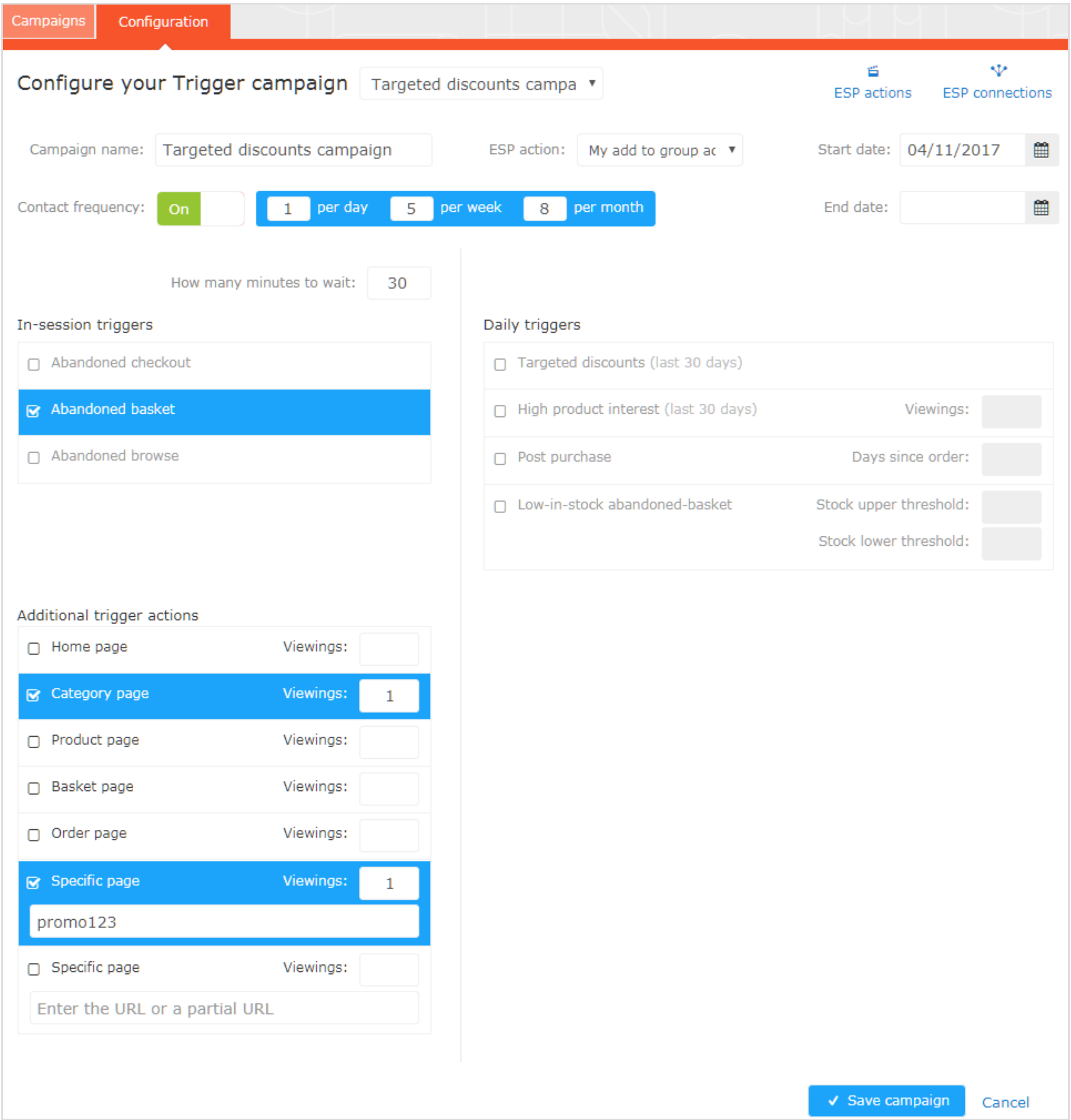
     > **Note:** The order of additional trigger actions does not matter.

     > **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 visitor, the trigger fires 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 visitor 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 visitor must have visited a category page at least once.
- You also can add a specific URL match. In this case, the visitor 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).

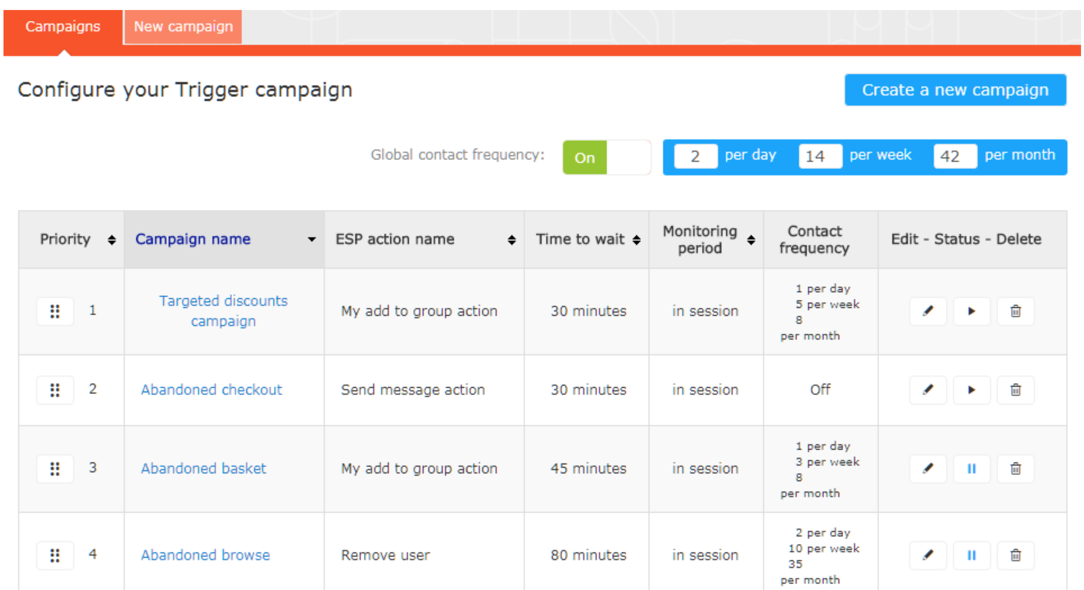

Campaigns
Configuration
Configure your Trigger campaign
Targeted discounts campa
ESP actions
ESP connections
Campaign name: Targeted discounts campaign
ESP action: My add to group ac
Start date: 04/11/2017
Contact frequency: On
1 per day
5 per week
8 per month
End date:
How many minutes to wait: 30
In-session 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 for the Personalization Portal account and select the **Campaigns** tab.

This page allows you to do the following:

- Set a Global contact frequency.
- Edit a triggers 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	
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	2 per day 10 per week 35 per month	

Global contact frequency

The **Global contact frequency** limits the firing of triggers from all the trigger 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.

> **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

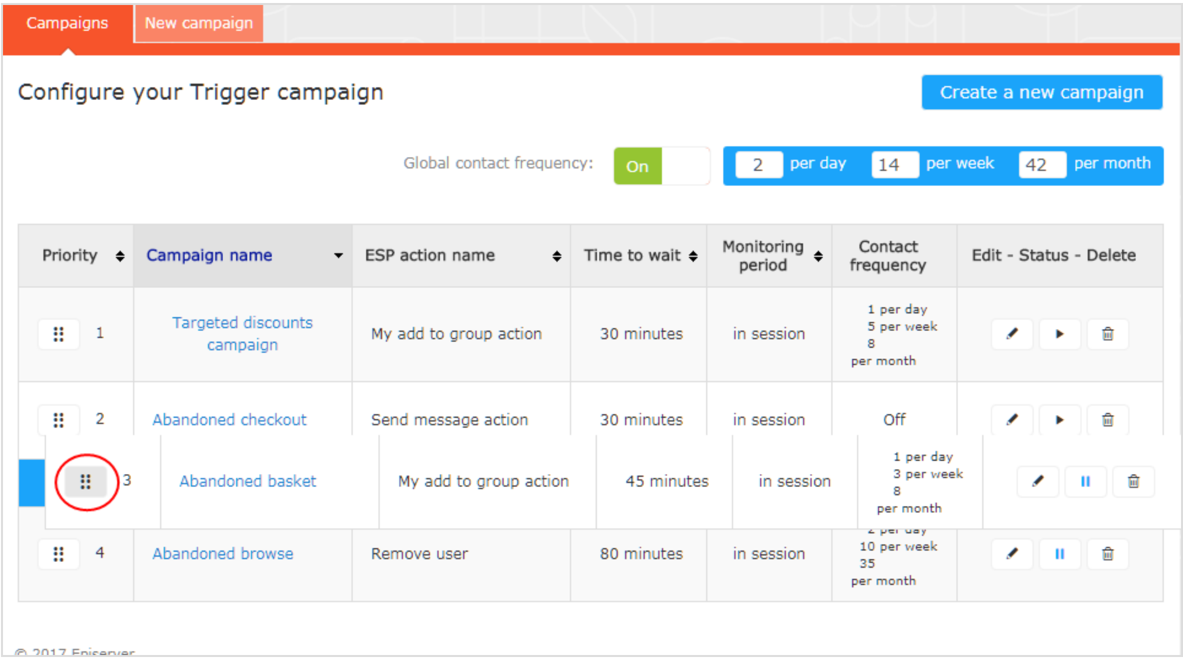
- **Edit**. Click **Edit** or on a triggers campaign name to open the configuration page for that campaign so you can edit it.
- **Status**. Click **Activate it** to switch on a campaign or **Pause it** to switch off a campaign. The initial state of a newly created trigger is paused.
- **Delete**. Click **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 trigger 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 for 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.


Campaigns
New campaign
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
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
10 per week
35
per month

Setting up a Mail campaign

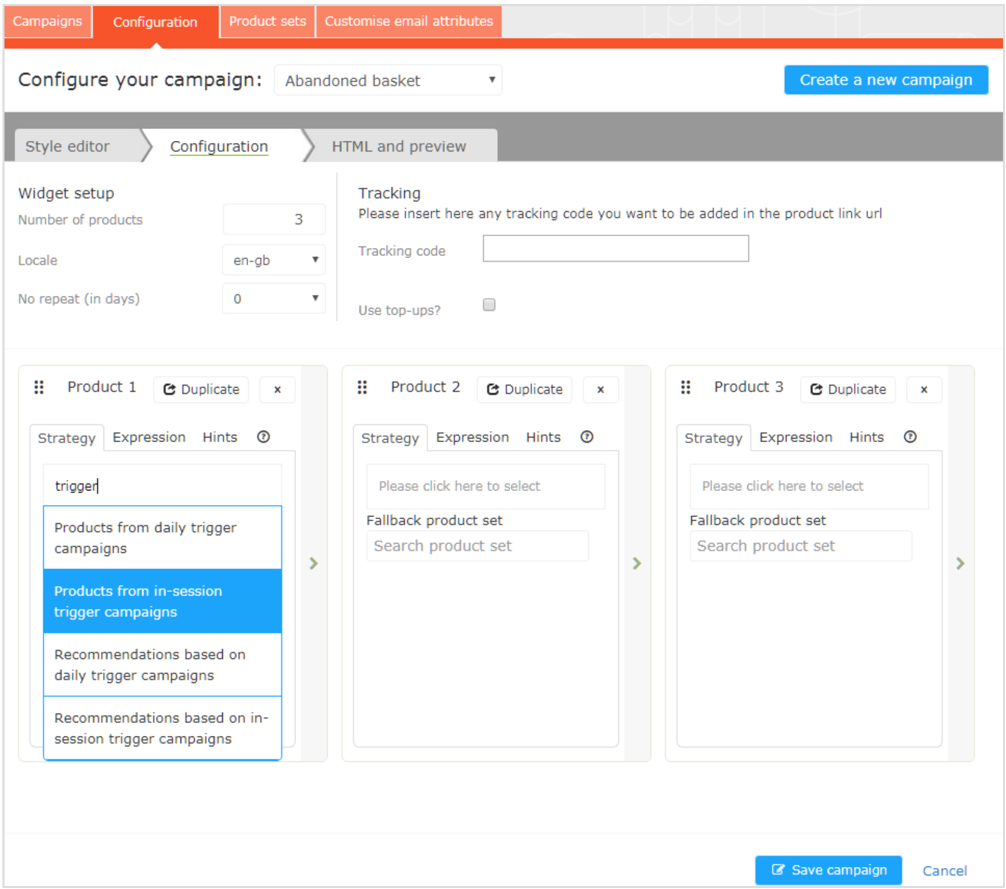
You can create a Mail campaign to return abandoned or personalized product recommendations in the email template that is sent to users for whom a trigger was fired. For information about creating a Mail campaign, see the *Episerver Mail User Guide*.

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

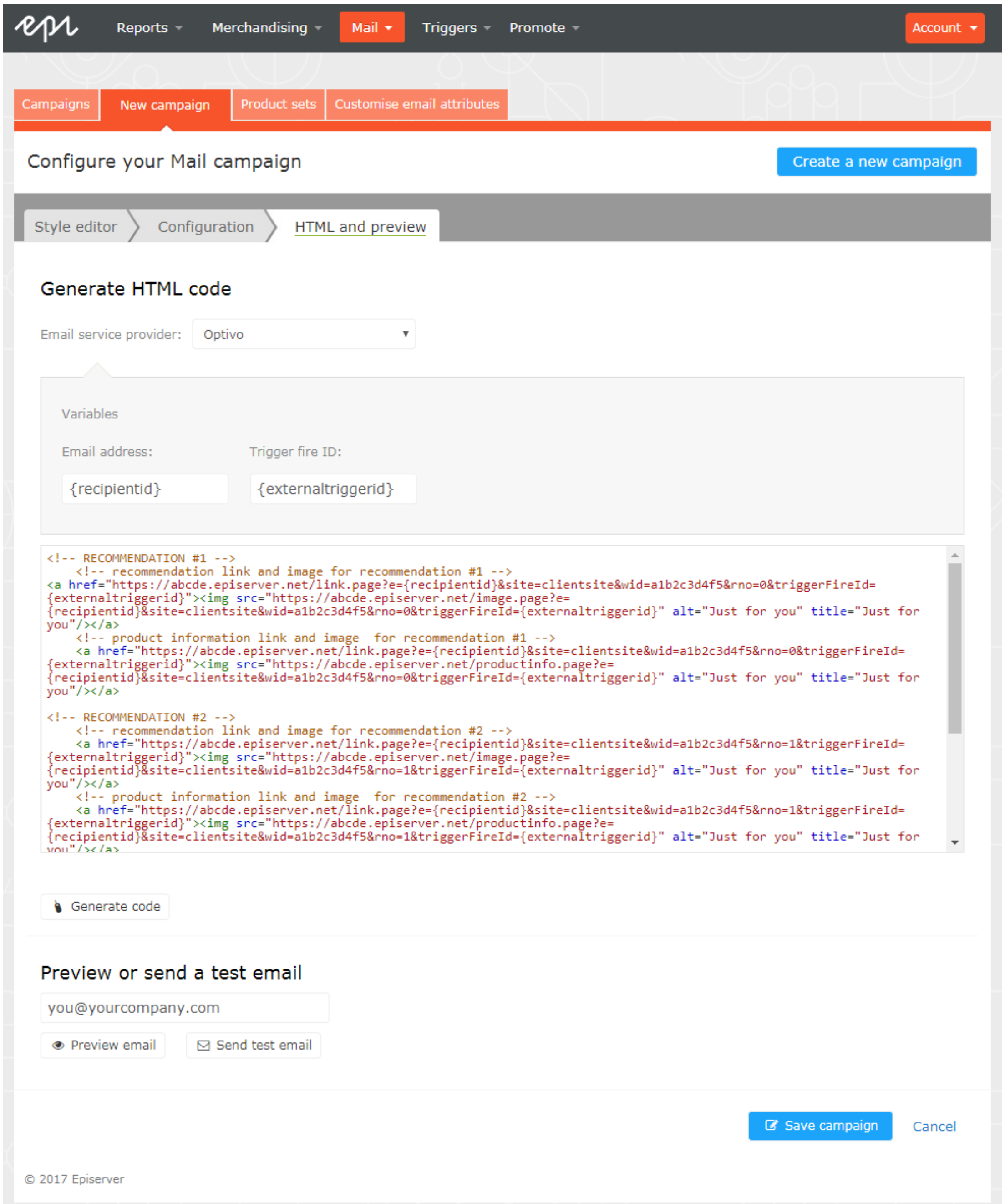
1. **Style editor**. Create the styling for the product information image of the abandoned or recommended products that will be displayed in the email.
2. **Configuration**. Select how many products you want to appear in the email campaign, specify localization settings, add third-party tracking code, 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 check-out.
    - **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

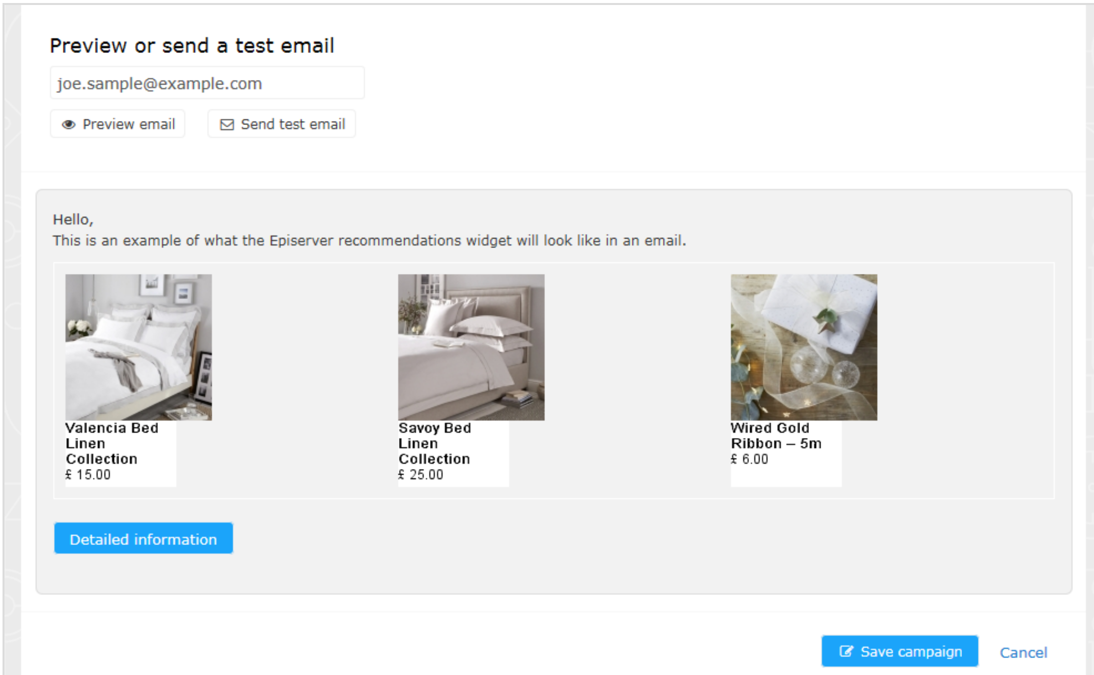
© Episerver 2019

the trigger used, such as Abandoned basket, browse or checkout, for the current session.



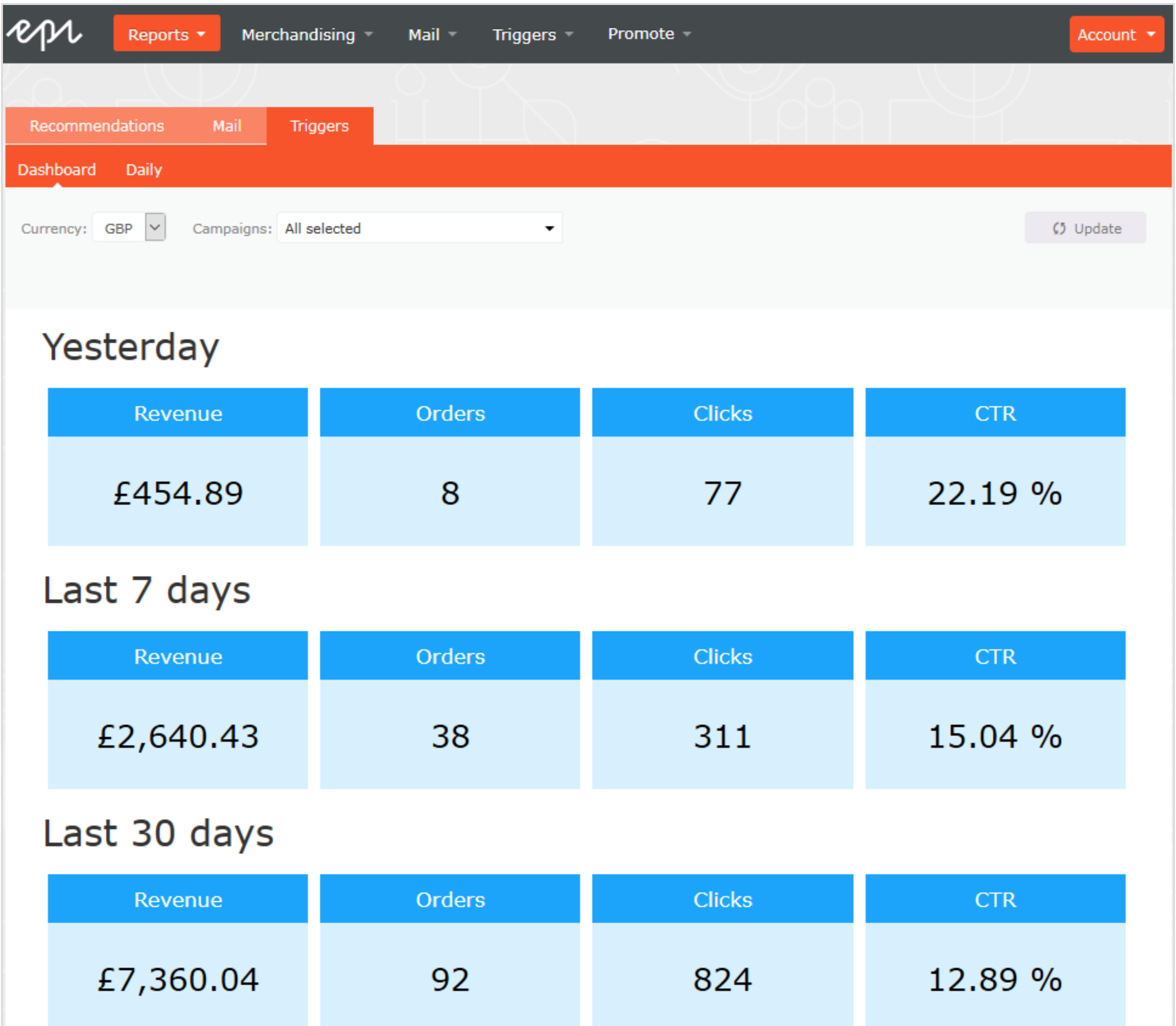
3. **HTML and preview.** Generate the code to copy and insert into your email template later, and preview the output of your Mail campaign. Select the correct ESP in the **Email service provider** drop-down menu, so that the correct placeholders are automatically populated in the variables fields. Click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


Reports
Merchandising
Mail
Triggers
Promote
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:
Optivo
Variables
Email address:
Trigger fire ID:
{recipientid}
{externaltriggerid}
<!-- RECOMMENDATION #1 -->
<!-- recommendation link and image for recommendation #1 -->
<!-- product information link and image for recommendation #1 -->
<!-- RECOMMENDATION #2 -->
<!-- recommendation link and image for recommendation #2 -->
<!-- product information link and image for recommendation #2 -->
Generate code
Preview or send a test email
you@yourcompany.com
Preview email
Send test email
Save campaign
Cancel
© 2017 Episerver

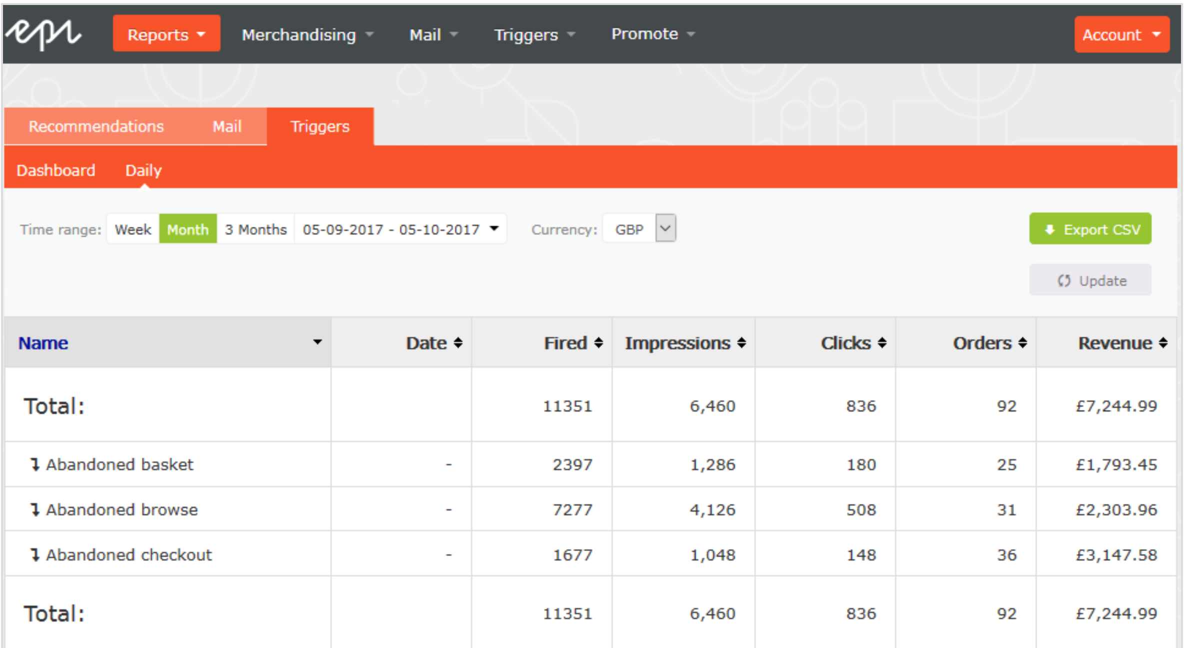


Triggers reports in Episerver

In the Reports section in the for 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.


Reports
Merchandising
Mail
Triggers
Promote
Account
Recommendations
Mail
Triggers
Dashboard
Daily
Time range:
Week
Month
3 Months
05-09-2017 - 05-10-2017
Currency:
GBP
Export CSV
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

Using Triggers with Episerver Campaign

This section shows how to connect Triggers to Episerver Campaign.

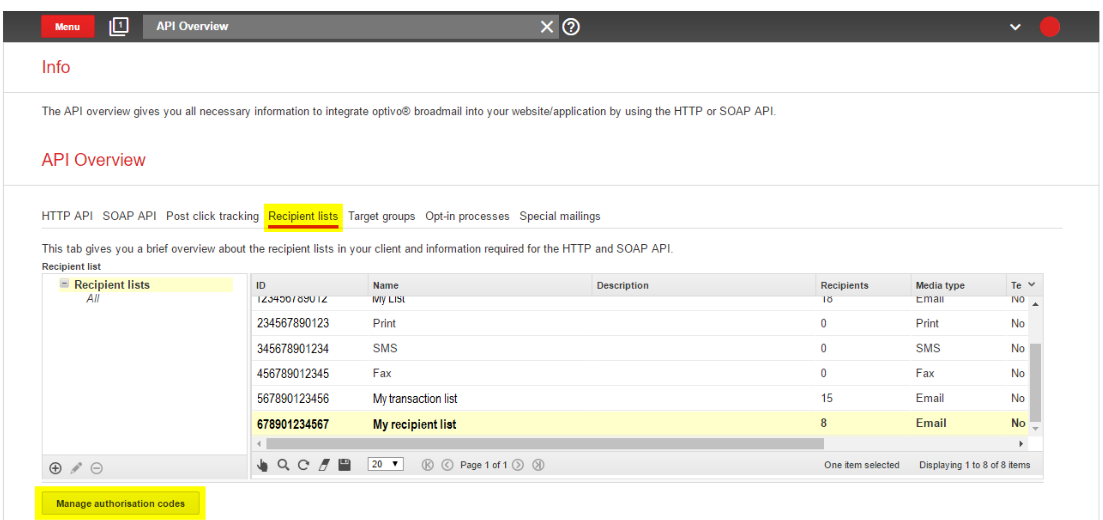
Connecting to Episerver Campaign

A Recipient list authorization code creates a connection between Episerver Campaign and the Episerver Personalization Portal and adds **triggerFireld** to a user's entry in the recipient list.

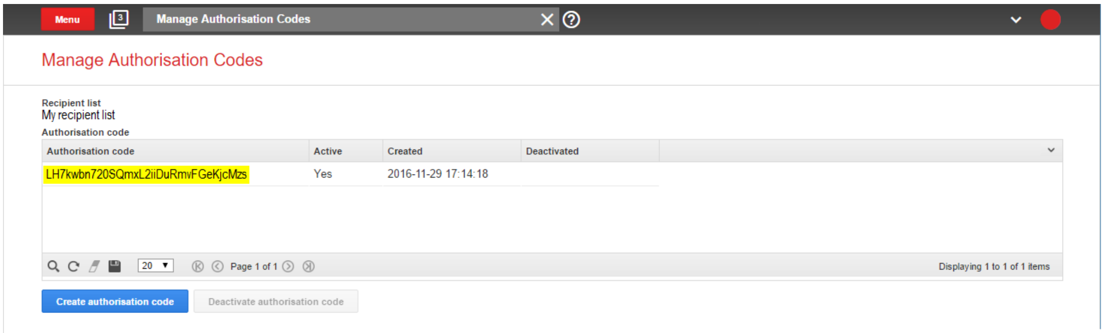
> **Note:** Contact Episerver to set up Triggers, and extend your recipient list with a **triggerFireld**, and state that the list needs one of the following as the primary key:
>
> - **hasheduserid**. If you use hashed email addresses.
> - **email**. If you use plain-text, non-hashed email addresses.

To retrieve the authorization code, use the following steps:

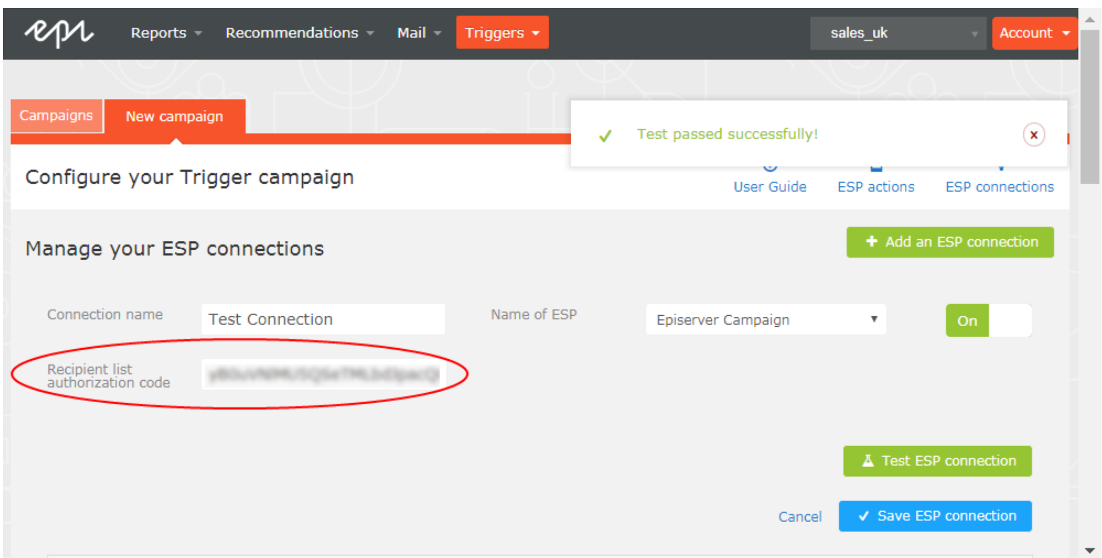
1. In Episerver Campaign, from the main menu, go to **Administration** > **API overview**.
2. Select **Recipient lists** to show its table.
3. Select your recipient list from the table.
4. Click **Manage authorization codes**.



5. From the **Manage Authorization Codes** view, copy the authorization code.



6. Paste the authorization code into the Personalization Portal, on the **Triggers** > **New campaign** > **ESP connections** page.



7. Enter the connection name.
8. Select **Episerver Campaign** as the name of your ESP.
9. Click **Test ESP connection**.
10. If the connection was successful, click **Save ESP connection**.

Linking to a specific basket

Episerver can integrate links from an email recommendation to a particular basket of the recipient. To enable this feature, contact customer service.

For developer information, see Linking to a specific basket on Episerver World.

Sending triggered emails

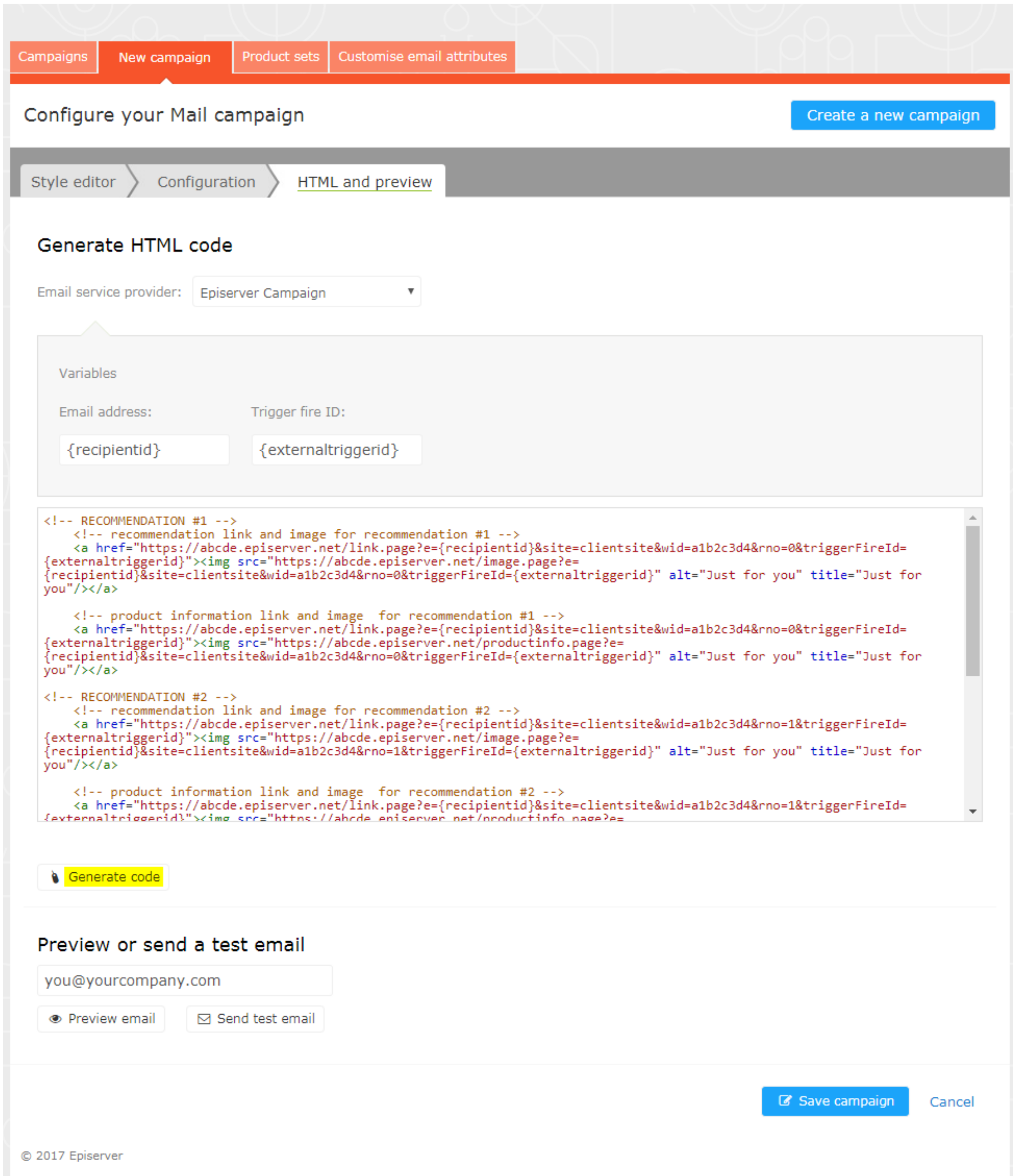
To send messages using Triggers directly to users, set up your Episerver mailing campaign in the Episerver Campaign portal, then create a send-message action in Episerver Triggers.

Setting up an email campaign in Episerver

The following procedure shows how to generate HTML code to copy from Episerver Mail into a mailing in the Episerver Campaign portal.

1. In the Personalization portal, go to **Mail** > **Campaigns**.
2. Select and open your Mail campaign.
3. Go to the **HTML and preview** tab.
4. Select **Episerver** as the **Email service provider**.
5. Click **Generate code**.

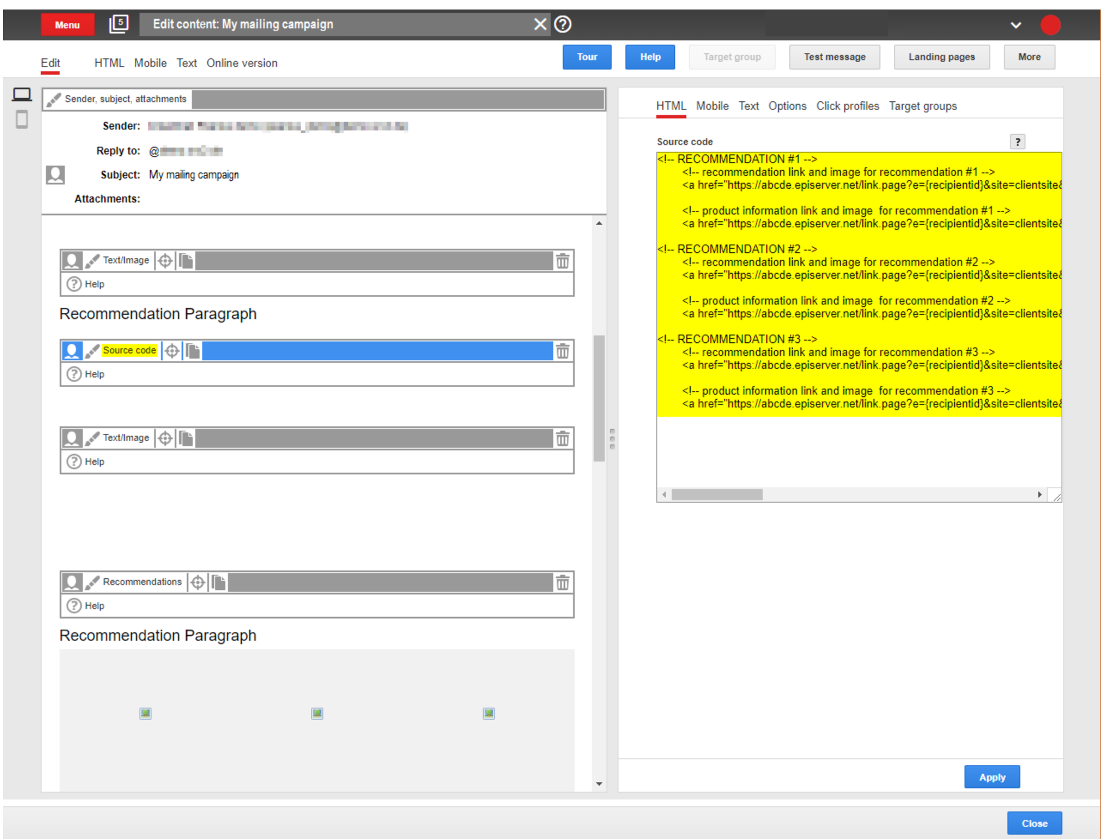
6. Copy the HTML code displayed in the window.



7. Go to Episerver Campaign.

> **Note:** To create a new mailing in Episerver Campaign, go to **Campaigns** > **Transactional emails** and following the instructions in [Transactional emails](#) in the Episerver Campaign User Guide.

8. From the main menu, go to **Campaigns** > **Transactional emails**.
9. Select your email campaign.
10. Click **Edit**.
11. In the flow diagram that opens, click the campaign and click **Edit** (pencil icon).
12. Click **Edit content**.
13. In the editor, add or find the **Source Code** paragraph where you want to insert the Episerver recommendations. In the following image, a separate **Text/Image paragraph** was added above for the heading "Recommendation Paragraph".
14. Click **Source code**.
15. Paste the HTML code (copied in step 6) into the right-hand panel:

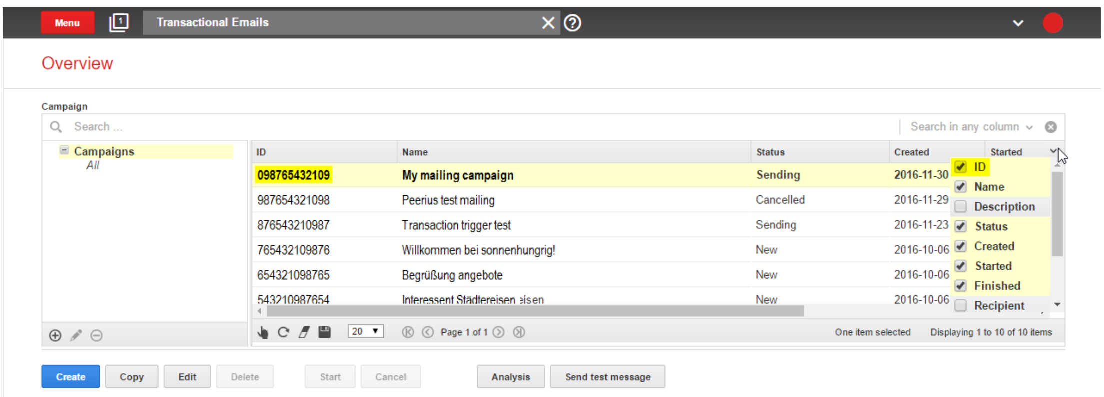


16. Click **Apply**.

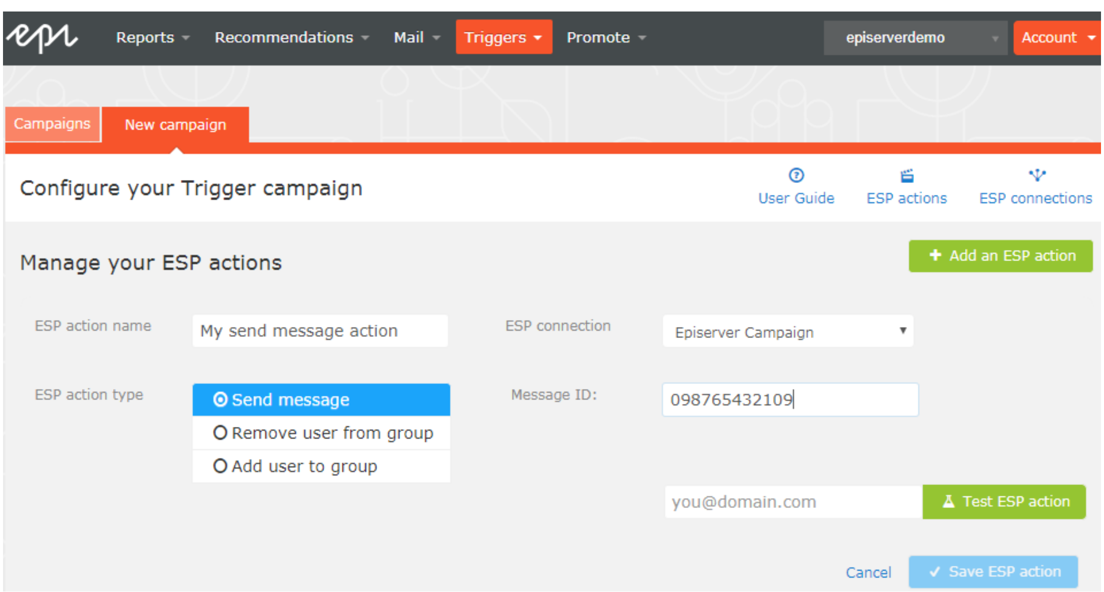
Creating a send-message action

To send messages using Triggers directly to users, you need to provide the **Mailing ID** of the Episerver mailing campaign on the Triggers ESP action page. You can retrieve the **Mailing ID** by following these steps:

1. In Episerver Campaign from the main menu, go to **Campaigns** > **Transactional** emails.
2. Copy the **Mailing ID** for your campaign from the ID column.



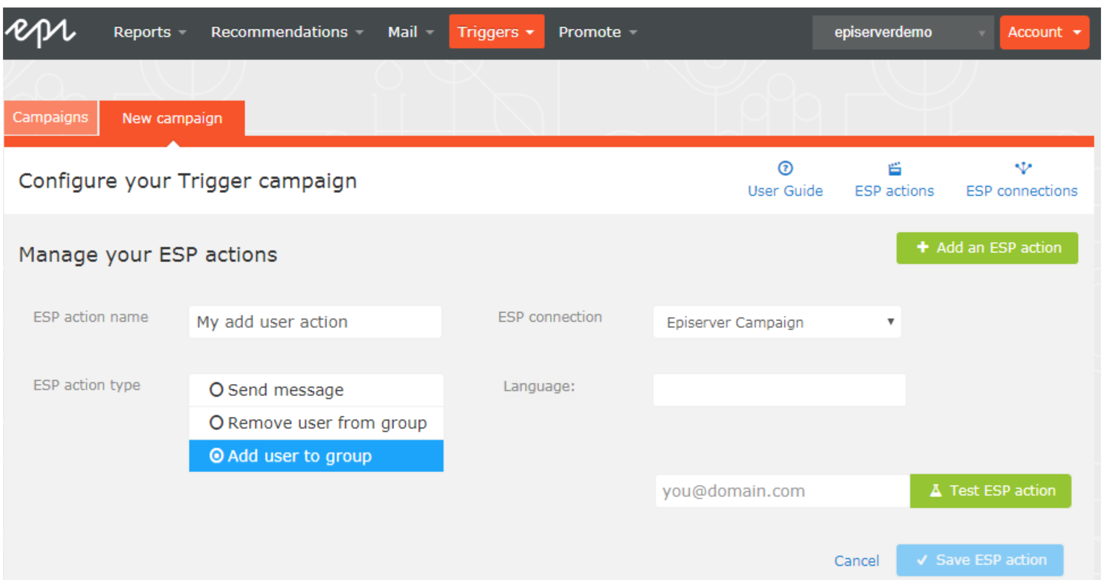
3. In the Personalization Portal, go to **Triggers** > **New campaign** > **ESP actions** page and paste the **Mailing ID**.



   a. **ESP action name.** Enter the action name.
   b. **ESP connection.** Select the connection that you created earlier.
   c. **ESP action type.** Select Send message.
   d. **Mailing ID.** Enter the campaign Mailing ID.
   e. **Test ESP action.** Enter the email address of the email recipient and click Test ESP action.
4. If the test is successful, click **Save ESP action**.

Creating an Add user to group action

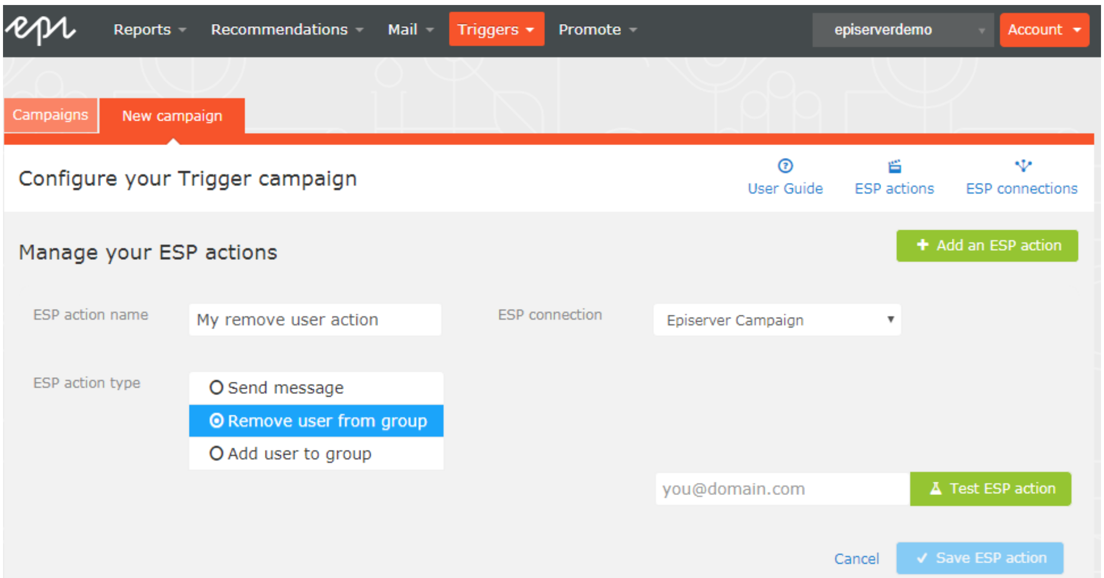
1. In the Personalization Portal, go to **Triggers** > **New campaign** > **ESP actions** page.



   a. **ESP action name.** Enter the action name.
   b. **ESP action type.** Select Add user to group.
   c. **ESP connection.** Select the connection that you created earlier.
   d. **Language.** Enter the language code (such as en, de, sv) of the user. The language code configures email campaigns that feed the products into the email with the correct currency for each language, and ensures the titles are displayed in the correct language and the prices are in the correct currency. For ambiguous language codes, such as English (which can have different currencies in the US and UK, for example), Episerver Campaign performs an additional check on the user information to use the correct currency.
   e. **Test ESP action.** Enter the email address of the user and click Test ESP action.
2. If the test is successful, click **Save ESP action**.

Create a Remove user from group action

1. In the Personalization Portal, go to **Triggers > New campaign > ESP actions** page.



   a. **ESP action name**. Enter the action name.
   b. **ESP action type**. Select Remove user from group.
   c. **ESP connection**. Select the connection that you created earlier.
   d. **Test ESP action**. Enter the email address of the user and click Test ESP action.
2. If the test is successful, click **Save ESP action**.

Episerver Digital Experience Cloud

The Episerver Digital Experience Cloud™ unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

About Episerver

At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

For more information, visit **episerver.com**.