



Episerver Reach

User Guide





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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 Episerver for 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.

Dailytriggers	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.

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.

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.

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.

The screenshot shows the 'Configure your Trigger campaign' page in the Episerver Reach interface. The top navigation bar includes 'Reports', 'Merchandising', 'Mail', 'Triggers', and 'Promote'. The 'Triggers' dropdown is active. Below the navigation, there are tabs for 'Campaigns' and 'New campaign'. A notification banner says 'Set up a connection to your...'. The main content area is titled 'Configure your Trigger campaign'. It features several input fields: 'Campaign name' (with a help icon), 'ESP action' (a dropdown menu currently showing 'Please select'), 'Start date' (set to '02/10/2017'), and 'End date'. A red error message below the ESP action field reads 'Please provide an ESP Action for this Trigger.' There is a 'Contact frequency' toggle set to 'Off' and a 'How many minutes to wait' input field. The page is divided into three sections: 'In-session triggers' with checkboxes for 'Abandoned checkout', 'Abandoned basket', and 'Abandoned browse'; 'Daily triggers' with 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); and 'Additional trigger actions' with checkboxes for 'Home page', 'Category page', 'Product page', 'Basket page', 'Order page', and 'Specific page', each with a 'Viewings' input. At the bottom of this section is a text input field labeled 'Enter the URL or a partial URL'. In the bottom right corner, there are two buttons: 'Save campaign' (with a checkmark icon) and 'Cancel'. The footer contains the copyright notice '© 2017 Episerver'. The 'ESP connections' link in the top right corner 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.

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 and controls:

- 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]
- On: [toggle switch]
- Buttons: Test ESP connection, Save ESP connection, Cancel

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](#).

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. A tooltip above it says 'Set up the action for your ESP to perform.'. The main section is titled 'Manage your ESP actions' and includes a '+ Add an ESP action' button. Below this, there is a table 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**.

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

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.

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	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.

Global contact frequency: On 2 per day 14 per week 42 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 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 Off 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	2 per day 10 per week 35 per month	

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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

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

The screenshot shows the 'Configure your campaign' interface. At the top, there are tabs for 'Campaigns', 'Configuration', 'Product sets', and 'Customise email attributes'. The 'Configuration' tab is active. Below the tabs, there is a dropdown menu for 'Configure your campaign:' set to 'Abandoned basket' and a 'Create a new campaign' button. The main configuration area is divided into three sections: 'Style editor', 'Configuration', and 'HTML and preview'. The 'Configuration' section is currently selected and contains two main areas: 'Widget setup' and 'Tracking'. 'Widget setup' includes fields for 'Number of products' (set to 3), 'Locale' (set to en-gb), and 'No repeat (in days)' (set to 0). 'Tracking' includes a text area for 'Please insert here any tracking code you want to be added in the product link url', a 'Tracking code' input field, and a 'Use top-ups?' checkbox. Below these are three product configuration panels, labeled 'Product 1', 'Product 2', and 'Product 3'. Each panel has a 'Duplicate' button and a close button. 'Product 1' is expanded to show a 'Strategy' dropdown menu with options: 'trigger|', 'Products from daily trigger campaigns', 'Products from in-session trigger campaigns' (highlighted in blue), 'Recommendations based on daily trigger campaigns', and 'Recommendations based on in-session trigger campaigns'. 'Product 2' and 'Product 3' are collapsed, showing 'Please click here to select' for the strategy and 'Fallback product set' and 'Search product set' input fields. At the bottom right, 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 must insert the generated HTML code into the email template in your ESP account.

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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: {recipientid}

Trigger fire ID: {externaltriggerid}

```

<!-- 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>

```

Generate code

Preview or send a test email

you@yourcompany.com




Preview email
Send test email

Save campaign
Cancel

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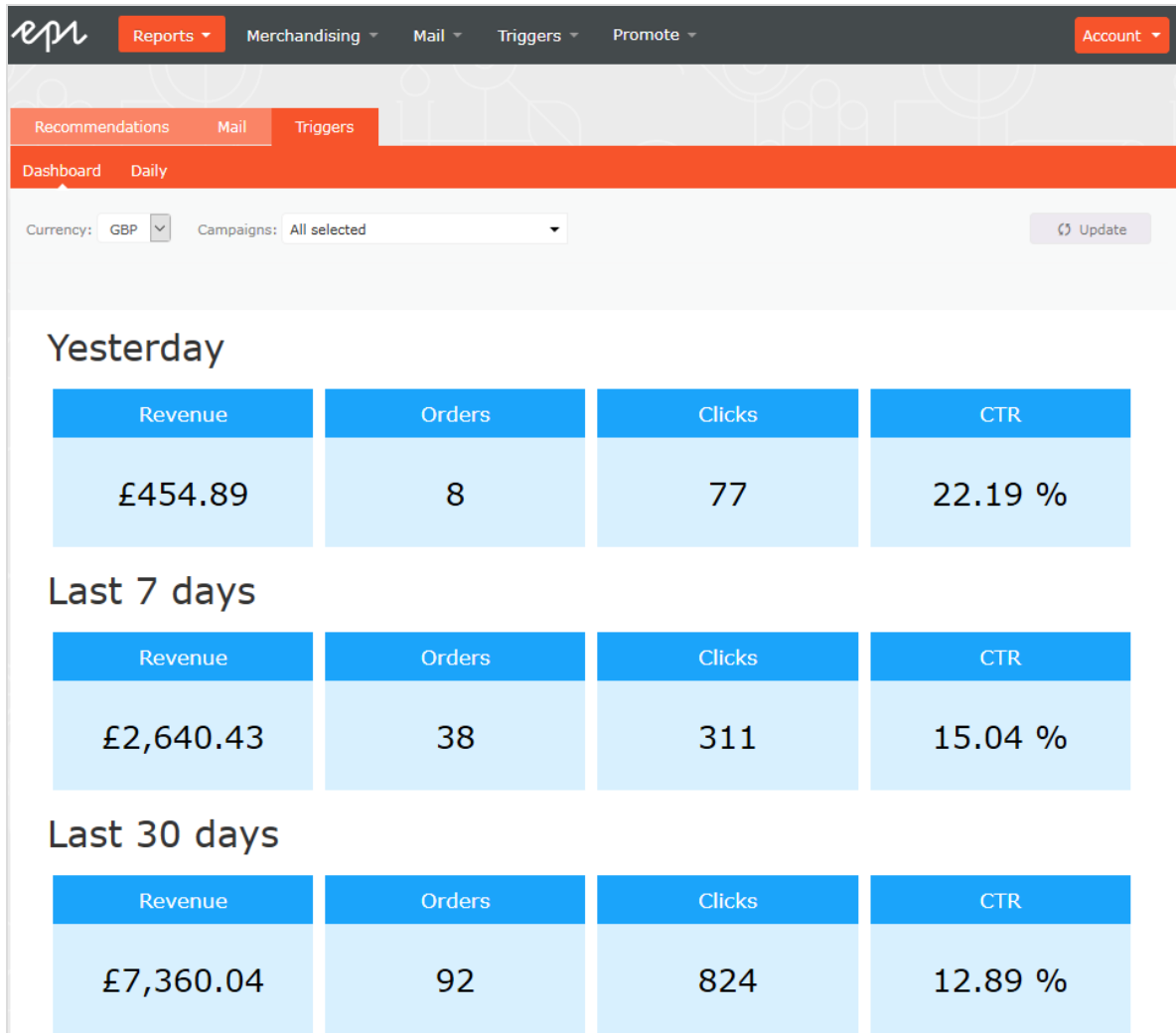
Preview or send a test email

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

 <p>Valencia Bed Linen Collection £ 15.00</p>	 <p>Savoy Bed Linen Collection £ 25.00</p>	 <p>Wired Gold Ribbon - 5m £ 6.00</p>
---	--	---

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.

The screenshot displays the Episerver Reach Reports interface. At the top, there is a navigation bar with the 'epi' logo and menu items: Reports, Merchandising, Mail, Triggers, Promote, and Account. Below this, there are sub-menus for Recommendations, Mail, and Triggers. The main content area is titled 'Dashboard' and 'Daily'. It includes filters for 'Time range' (Week, Month, 3 Months) and 'Currency' (GBP). There are buttons for 'Export CSV' and 'Update'. The main data is presented in a table with columns: Name, Date, Fired, Impressions, Clicks, Orders, and Revenue.

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

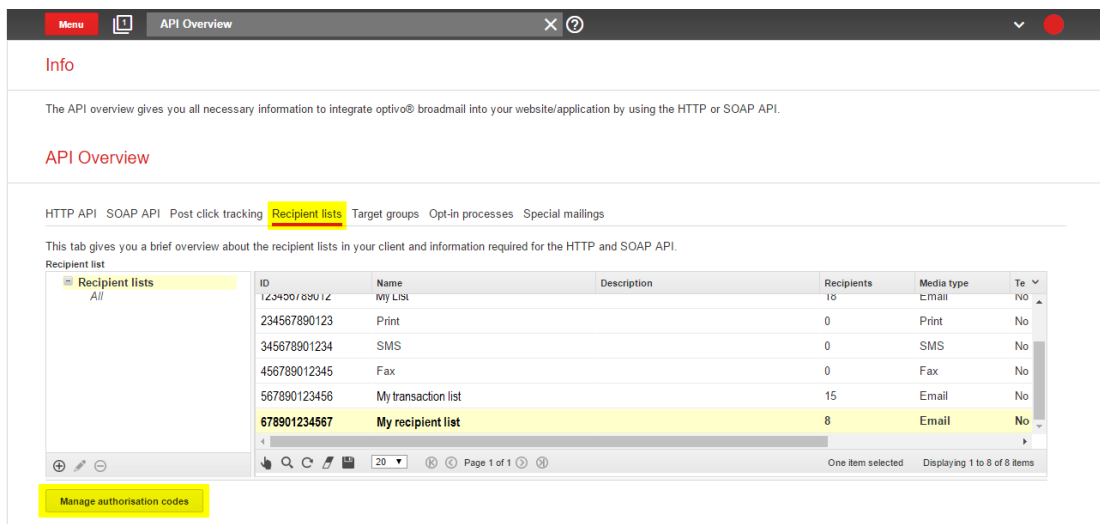
A Recipient list authorization code creates a connection between Episerver Campaign and the Episerver Personalization Portal and adds **triggerField** to a user's entry in the recipient list.

Note: Contact [Episerver](#) to set up Triggers, and extend your recipient list with a **triggerField**, 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:

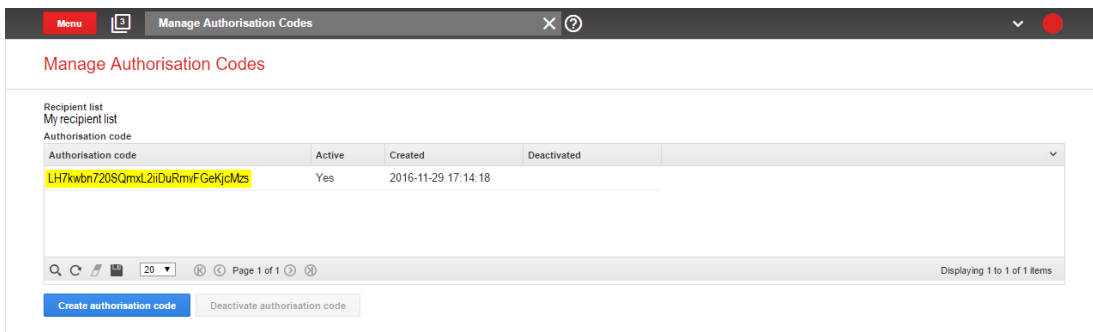
1. In Episerver Campaign, from the main menu, go to **Administration > API overview**.
2. Select **Recipient lists** to show its table.
3. Select your recipient list from the table.
4. Click **Manage authorization codes**.



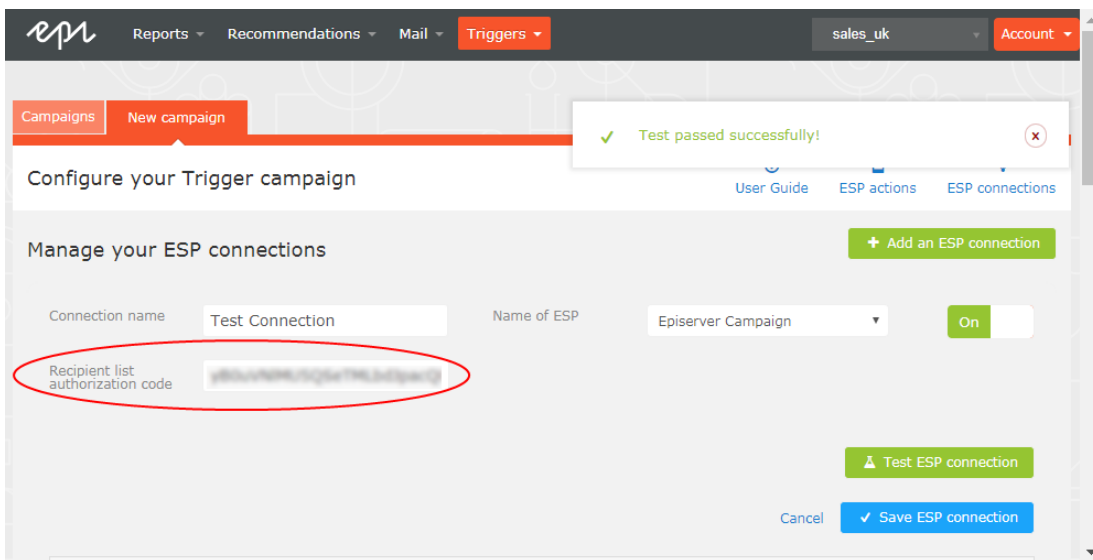
The screenshot shows the 'API Overview' page in Episerver Campaign. The 'Recipient lists' tab is selected, displaying a table of recipient lists. The table has columns for ID, Name, Description, Recipients, Media type, and Te (likely Telemarketing). The row for 'My recipient list' is highlighted in yellow, showing 8 recipients and an email media type. A yellow button labeled 'Manage authorisation codes' is visible at the bottom left of the table area.

ID	Name	Description	Recipients	Media type	Te
12345678901234	My List		10	Email	No
234567890123	Print		0	Print	No
345678901234	SMS		0	SMS	No
456789012345	Fax		0	Fax	No
567890123456	My transaction list		15	Email	No
678901234567	My recipient list		8	Email	No

- 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.

The screenshot shows the 'Configure your Mail campaign' interface. At the top, there are tabs for 'Campaigns', 'New campaign', 'Product sets', and 'Customise email attributes'. Below these is a sub-header 'Configure your Mail campaign' with a 'Create a new campaign' button. The main navigation bar includes 'Style editor', 'Configuration', and 'HTML and preview' (which is selected). The 'Generate HTML code' section features a dropdown for 'Email service provider' set to 'Episerver Campaign'. Below this is a 'Variables' section with 'Email address' set to '{recipientid}' and 'Trigger fire ID' set to '{externaltriggerid}'. A large text area contains the generated HTML code, which includes recommendation links and images for two recommendations. Below the code is a 'Generate code' button. The 'Preview or send a test email' section has an input field with 'you@yourcompany.com' and buttons for 'Preview email' and 'Send test email'. At the bottom right, there are 'Save campaign' and 'Cancel' buttons. The footer shows '© 2017 Episerver'.

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.

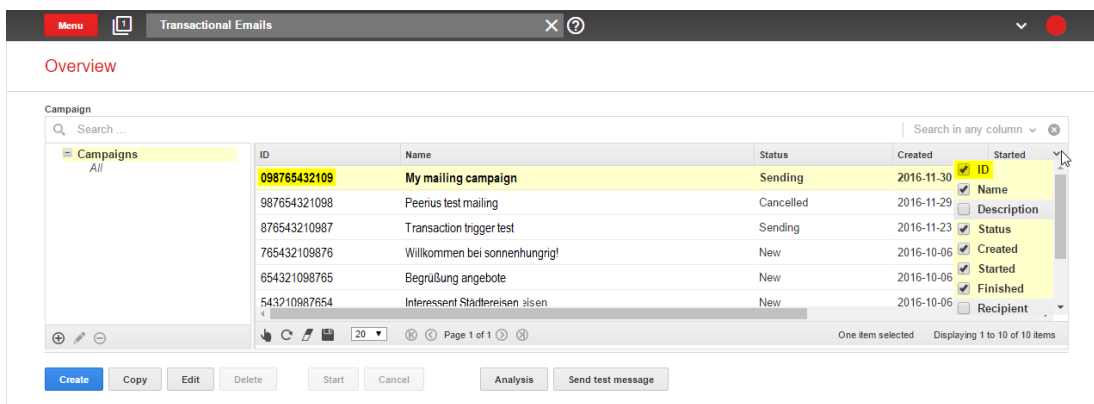
8. From the main menu, go to **Campaigns > Transactional emails**.
9. Select your email campaign.
10. Click **Edit**.
11. In the flow diagram that opens, click the campaign and click **Edit** (pencil icon).
12. Click **Edit content**.
13. In the editor, add or find the **Source Code** paragraph where 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**.

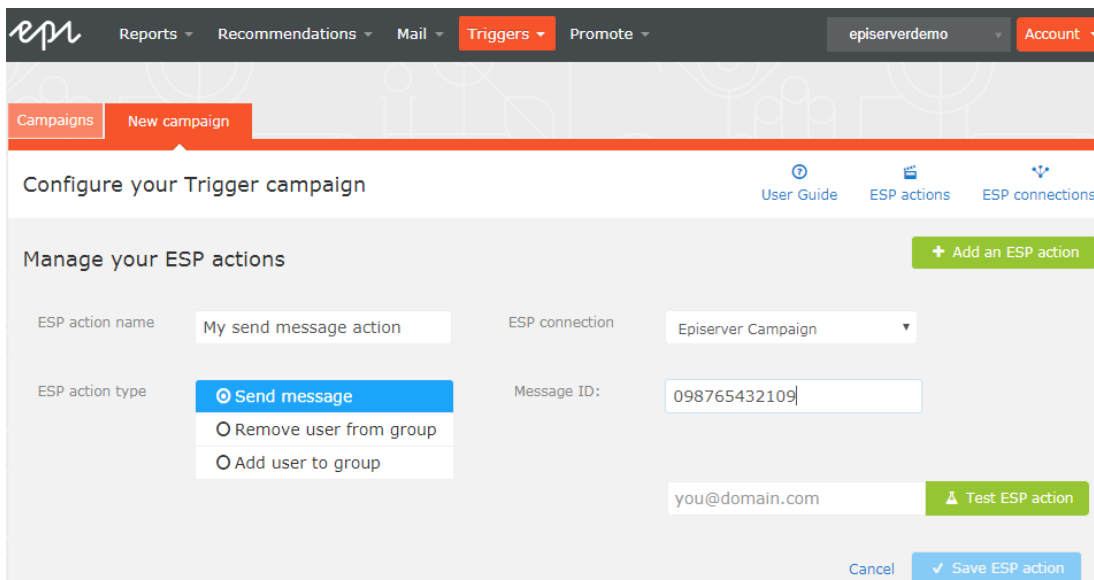
Creating a send-message action

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.

The screenshot shows the 'Configure your Trigger campaign' page in the Episerver Campaign interface. The page is titled 'Configure your Trigger campaign' and has a navigation bar with 'Reports', 'Recommendations', 'Mail', 'Triggers', and 'Promote'. The 'Triggers' menu is active. Below the navigation bar, there are tabs for 'Campaigns' and 'New campaign'. The main content area is titled 'Manage your ESP actions' and includes a '+ Add an ESP action' button. The form fields are: 'ESP action name' (My add user action), 'ESP connection' (Episerver Campaign), 'ESP action type' (Send message, Remove user from group, Add user to group), 'Language:' (empty), and 'you@domain.com' (email address). There are 'Cancel', 'Test ESP action', and 'Save ESP action' buttons.

- 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.

The screenshot shows the Episerver Personalization Portal interface. At the top, there is a navigation bar with 'epi' logo, 'Reports', 'Recommendations', 'Mail', 'Triggers', and 'Promote' menus. A user profile 'episerverdemo' and an 'Account' dropdown are on the right. Below the navigation, there are tabs for 'Campaigns' and 'New campaign'. The main heading is 'Configure your Trigger campaign', with links for 'User Guide', 'ESP actions', and 'ESP connections'. The 'Manage your ESP actions' section features a '+ Add an ESP action' button. The form includes: 'ESP action name' (text input: 'My remove user action'), 'ESP connection' (dropdown: 'Episerver Campaign'), 'ESP action type' (radio buttons: 'Send message', 'Remove user from group' (selected), 'Add user to group'), an email input field with 'you@domain.com', and a 'Test ESP action' button. At the bottom right, there are 'Cancel' and 'Save ESP action' buttons.

- 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](https://www.episerver.com).

