



Episerver Reach

User Guide





© EpiServer 2019

EpiServer Reach User Guide

Release date 2019-09-05

Table of contents

Triggers	5
Types of triggers	6
Daily triggers	6
In-session triggers	7
Setting up a Trigger campaign	8
Creating a new Trigger campaign	8
Setting up an ESP connection	10
Setting up an ESP action	12
Linking to a specific basket	14
Managing Trigger campaigns	15
Global contact frequency	15
Edit – Status – Delete	15
Setting up a Mail campaign	16
Triggers reports in Episerver	19
Using Triggers in Reach with Episerver Campaign	22
Sending triggered emails	22
Retrieving the Recipient list authorization code	24
Linking to a specific basket	25
Creating an ESP action	26
Creating a Send message action	26
Creating an Add user to target group action	28
Create a Remove user from target group action	29
Setting up an email campaign in Episerver	29



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 [Email Service Provider \(ESP\) connection](#) and [ESP action](#) (send mail, add to group, remove from group). Set up the ESP connection and the ESP action once, and these can act on all of your Trigger campaigns. Furthermore, each Triggers campaign must have an associated Mail campaign that uses an appropriate trigger strategy. See [Setting up a Mail campaign](#).

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 [Daily 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)

Post purchase

Low-in-stock abandoned-basket

Viewings:

Days since order:

Stock upper threshold:

Stock lower threshold:

Additional trigger actions

Home page

Category page

Product page

Basket page

Order page

Specific page

Specific page

Viewings:

Viewings:

Viewings:

Viewings:

Viewings:

Viewings:

Viewings:

promo123

Enter the URL or a partial URL

Save campaign

Cancel

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' interface. At the top, there's a navigation bar with 'Triggers' selected. Below it, the 'New campaign' tab is active. The main form includes:

- Campaign name:** A text input field.
- ESP action:** A dropdown menu currently showing 'Please select'. A red message below it says 'Please provide an ESP Action for this Trigger.'
- Start date:** A date picker set to 02/10/2017.
- End date:** A date picker.
- Contact frequency:** A toggle switch set to 'Off'.
- 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)', 'Post purchase', and 'Low-in-stock abandoned-basket'. Each has associated input fields for 'Viewings', 'Days since order', 'Stock upper threshold', and 'Stock lower threshold'.
- 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 field. There's also a text input for 'Enter the URL or a partial URL'.
- Top right:** A link 'ESP connections' is circled in red, next to 'ESP actions'.
- Bottom right:** 'Save campaign' and 'Cancel' buttons.
- Footer:** '© 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, there are links for 'ESP actions' and 'ESP connections'. The primary section is 'Manage your ESP connections', which includes a '+ Add an ESP connection' button. The form contains the following fields: 'Connection name' (My ESP connection), 'Name of ESP' (My ESP), 'ESP username' (John.Doe@example.com), 'ESP realm' (http://My-ESP-realm.com), and 'ESP password' (masked with dots). There is an 'On' toggle switch. At the bottom right, there are buttons for 'Test ESP connection', 'Cancel', and 'Save ESP connection'.

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](#).

This screenshot shows the 'Manage your ESP actions' section. A black notification banner at the top right says 'Set up the action for your ESP to perform.' The 'ESP actions' link is circled in red. There is a '+ Add an ESP action' button. Below this is a table with the following headers: 'ESP action name', 'ESP connection name', 'ESP action type', and '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.

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.

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.

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.

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 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.

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 -->
<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


© 2017 Episerver

Preview or send a 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



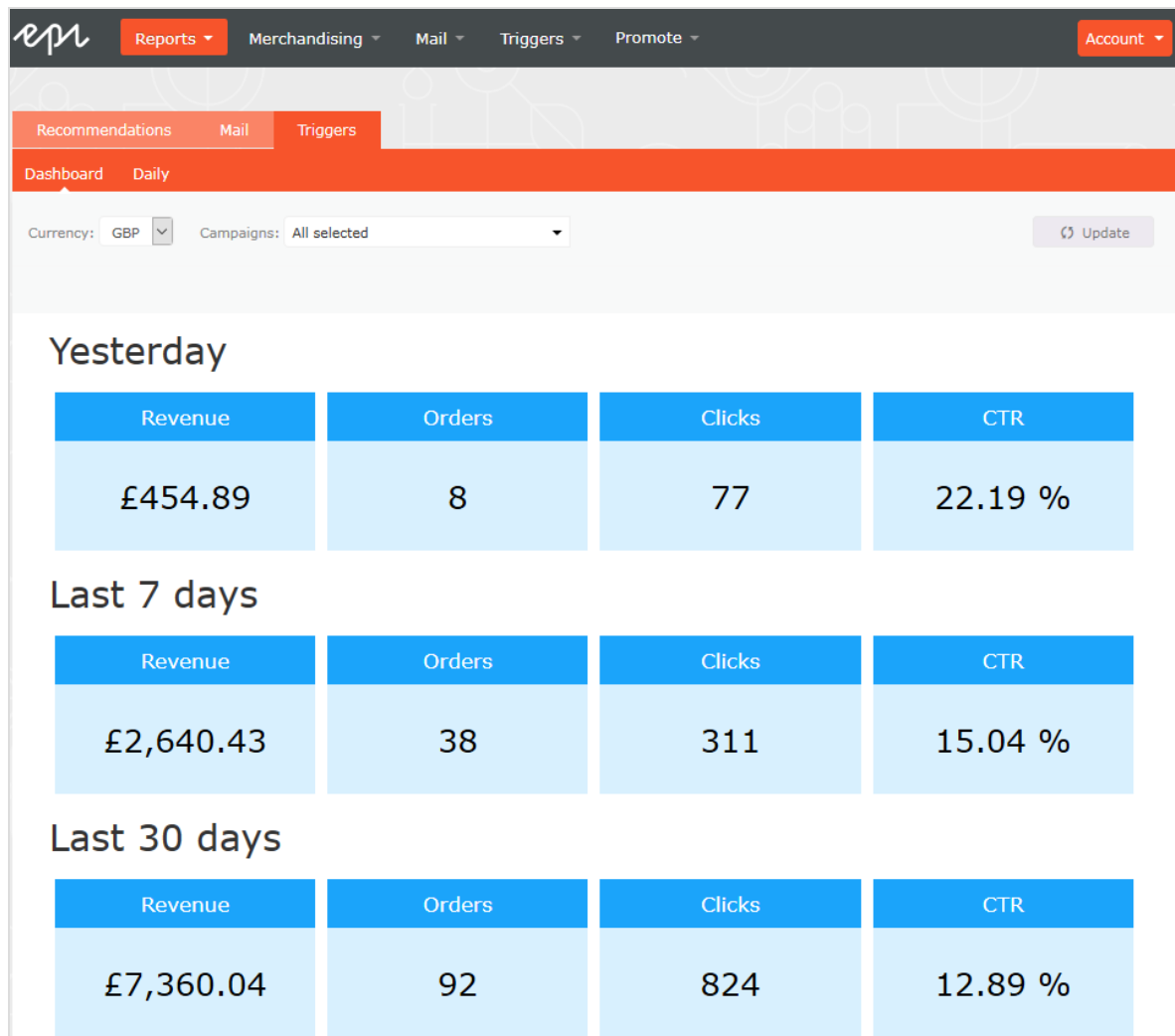
Wired Gold Ribbon – 5m
£ 6.00

[Detailed information](#)


[Cancel](#)

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.

<div>  <div> Reports Merchandising Mail Triggers Promote </div> <div>Account</div> </div>						
<div> Recommendations Mail Triggers </div>						
<div> Dashboard Daily </div>						
<div> Time range: <div> Week Month 3 Months </div> <div>05-09-2017 - 05-10-2017</div> <div>Currency: GBP</div> <div>Export CSV</div> <div>Update</div> </div>						
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 in Reach with Episerver Campaign

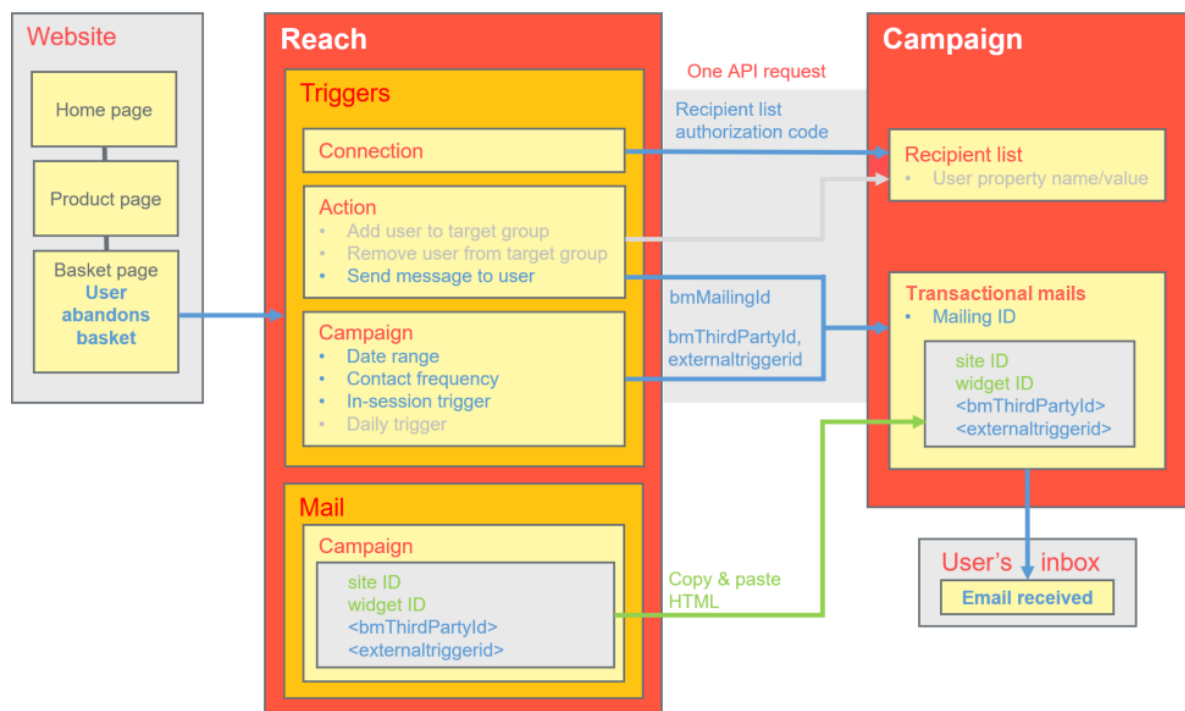
This topic shows how to connect Episerver Reach to Episerver Campaign.

Note: To use triggers in Episerver Reach with Episerver Campaign, your system administrator or developer must configure tracking first as described in the [technical documentation on Episerver World](#). When tracking is configured, you can continue to set up Triggers following the steps described here.

Sending triggered emails

You need to create a mailing campaign in Episerver Campaign, and campaigns in both Triggers and Mail for Reach. In Triggers, you also need to create a connection to your recipient list in Campaign and specify the appropriate action to take.

The following image shows the flow, through Reach and Campaign, when a user abandons their basket triggering an email to be sent to them directly.



To set up the Reach-to-Campaign integration, do the following.

- **Episerver Personalization Portal > Triggers**, set up the following:
 - **ESP connection** to connect to the Episerver Campaign HTTP API. Enter the **Recipient list authorization code**, which is a token giving authorization access to a particular recipient list. See [Retrieving the Recipient list authorization code](#) and also [Setting up an ESP connection](#).
 - **ESP action** to set up one of the following actions:
 - **Send Message**. Specify a **Mailing ID** for the email template in Episerver Campaign. The previous image shows this action being used. See [Creating a Send message action](#) and also [Setting up an ESP action](#).
 - **Add user to target group**. Specify a **User property name** and a **User property value**. See [Creating an Add user to target group action](#).
 - **Remove user from target group**. Specify a **User property name**. See [Creating a Remove user from group action](#).
 - [Set up an Episerver Triggers campaign](#) with a specific strategy, such as *Abandoned basket*.
- **Episerver Campaign portal**, set up the following:
 - **Recipient list**, which include a Recipient list authorization code.

Note: To receive an email from Episerver Reach, the end user has to exist in this Recipient list (which contains only end users who have opted-in).

 - **Transactional mail campaign**, which will have a Mailing ID.
 - Set up an associated transactional mail campaign in Episerver Campaign by [copying the generated HTML code](#) from **Episerver Mail** and pasting it into the email template (with that **Mailing ID**) on the Episerver Campaign portal. The HTML code contains placeholders that the ESP (that is, Episerver Campaign) replaces with the actual values for each email sent.

When an Episerver trigger fires, using the Episerver Campaign HTTP API, Triggers sends Episerver Campaign the following for a **Send Message** action:

- **Recipient list authorization code**. A Recipient list authorization code creates a connection between Episerver Campaign and the Episerver Personalization Portal, and adds the **triggerFireId** to a user's entry in the recipient list.
- **Mailing ID**. For **Send Message**, for that **Mailing ID**, Episerver Campaign replaces the placeholders in the Mail template HTML code with the values sent in the API request.

- **triggerFireId**. Replaced with the ID of the Triggers campaign sent in the API request.
- Either of the following:
 - **recipientId**. Replaced with the user's email address sent in the API request.
 - **bmThirdPartyId**. Replaced with the user's email address mapped from their pseudonymized user ID.

Retrieving the Recipient list authorization code

To retrieve the Recipient list authorization code:

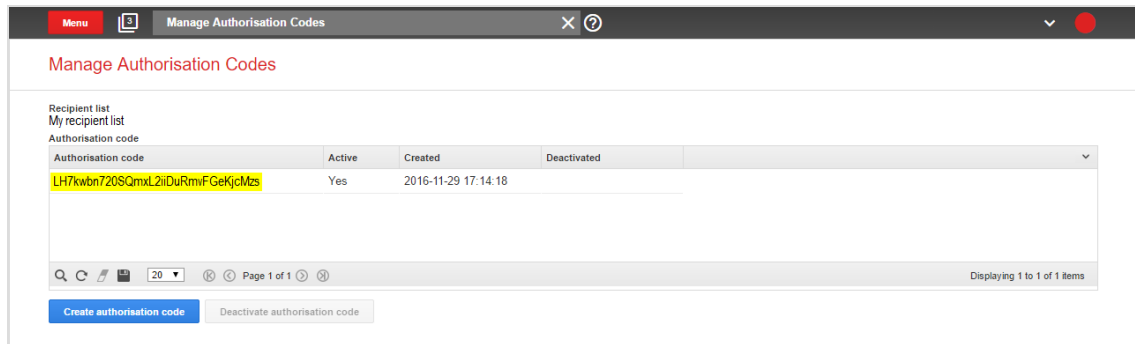
1. In Episerver Campaign, from the main menu, go to **Administration > API overview**.
2. Select **Recipient lists** to show its table.
3. Select your recipient list from the table.
4. Click **Manage authorization codes**.

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. The row with ID '678901234567' and Name 'My recipient list' is highlighted. Below the table, there is a 'Manage authorisation codes' button.

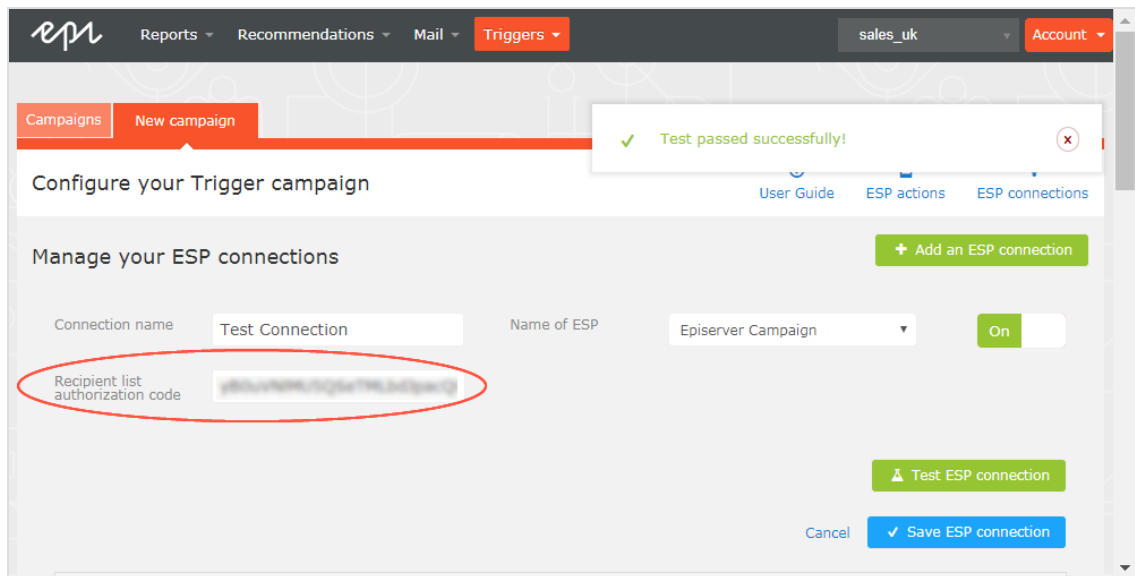
ID	Name	Description	Recipients	Media type	Te
123456789012	My List		10	Email	No
234567890123	Print		0	Print	No
345678901234	SMS		0	SMS	No
456789012345	Fax		0	Fax	No
567890123456	My transaction list		15	Email	No
678901234567	My recipient list		8	Email	No

Manage authorisation 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.

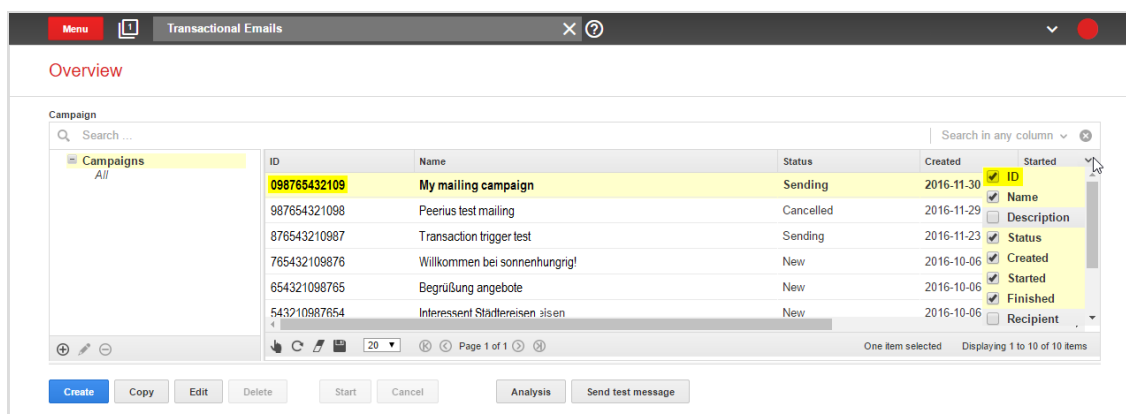
Creating an ESP action

See also [Setting up an ESP action](#).

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 mails**.
2. Copy the **Mailing ID** for your campaign from the ID column.



The screenshot shows the 'Transactional Emails' overview page in the Episerver Campaigns interface. The page title is 'Overview'. On the left, there is a sidebar with 'Campaigns' and 'All' listed. The main area contains a table of campaigns. The first row, 'My mailing campaign', is highlighted in yellow. The ID '098765432109' is visible in the ID column. A dropdown menu is open on the 'Started' column header, showing options like ID, Name, Description, Status, Created, Started, Finished, and Recipient. The table has columns for ID, Name, Status, Created, and Started. The first row is highlighted in yellow. The ID '098765432109' is visible in the ID column. The Name is 'My mailing campaign'. The Status is 'Sending'. The Created date is '2016-11-30'. The Started date is '2016-11-30'. The table also shows other campaigns like 'Peerius test mailing', 'Transaction trigger test', 'Willkommen bei sonnenhungrig!', 'Begrüßung Angebote', and 'Interessent Städtlerreisen isen'. The bottom of the page has buttons for 'Create', 'Copy', 'Edit', 'Delete', 'Start', 'Cancel', 'Analysis', and 'Send test message'.

ID	Name	Status	Created	Started
098765432109	My mailing campaign	Sending	2016-11-30	2016-11-30
987654321098	Peerius test mailing	Cancelled	2016-11-29	
876543210987	Transaction trigger test	Sending	2016-11-23	
765432109876	Willkommen bei sonnenhungrig!	New	2016-10-06	
654321098765	Begrüßung Angebote	New	2016-10-06	
543210987654	Interessent Städtlerreisen isen	New	2016-10-06	

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

The screenshot shows the 'Configure your Trigger campaign' page in the Episerver Campaign interface. The page has a top navigation bar with 'Reports', 'Recommendations', 'Mail', 'Triggers', and 'Promote'. The 'Triggers' tab is active. Below the navigation bar, there are tabs for 'Campaigns' and 'New campaign'. The main heading is 'Configure your Trigger campaign'. On the right, there are links for 'User Guide', 'ESP actions', and 'ESP connections'. The main section is titled 'Manage your ESP actions' and includes a '+ Add an ESP action' button. The form contains the following fields:

- ESP action name:** A text input field containing 'My send message action'.
- ESP connection:** A dropdown menu showing 'Episerver Campaign'.
- ESP action type:** A radio button group with three options: 'Send message' (selected), 'Remove user from group', and 'Add user to group'.
- Message ID:** A text input field containing '098765432109'.
- Email address:** A text input field containing 'you@domain.com'.

At the bottom right, there are two buttons: 'Cancel' and 'Save ESP action'.

- ESP action name.** Enter the action name.
 - ESP connection.** Select the connection that you created earlier.
 - ESP action type.** Select **Send message**.
 - Mailing ID.** Enter the campaign Mailing ID.
 - 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 target 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 Personalization Portal. The top navigation bar includes 'Reports', 'Recommendations', 'Mail', 'Triggers', and 'Promote'. The 'Triggers' tab is active, and the 'New campaign' sub-tab is selected. The main heading is 'Configure your Trigger campaign'. Below this, there are links for 'User Guide', 'ESP actions', and 'ESP connections'. The 'Manage your ESP actions' section is visible, with a green '+ Add an ESP action' button. The form contains the following fields and options:

- ESP action name:** A text input field containing 'My add user action'.
- ESP connection:** A dropdown menu showing 'Episerver Campaign'.
- ESP action type:** A radio button group with three options: 'Send message', 'Remove user from group', and 'Add user to group' (which is selected).
- Language:** An empty text input field.
- Email address:** A text input field containing 'you@domain.com'.
- Buttons:** A green '+ Add an ESP action' button at the top right, a green 'Test ESP action' button next to the email field, a blue 'Cancel' button, and a blue 'Save ESP action' button at the bottom right.

- a. **ESP action name.** Enter the action name.
 - b. **ESP action type.** Select Add user to target 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 your 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 target group action

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

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there's a navigation bar with 'Reports', 'Recommendations', 'Mail', 'Triggers', and 'Promote'. Below this, a sub-navigation bar has 'Campaigns' and 'New campaign'. The main heading is 'Configure your Trigger campaign'. On the right, there are links for 'User Guide', 'ESP actions', and 'ESP connections'. The main section is 'Manage your ESP actions', which includes a '+ Add an ESP action' button. Below this, there are two rows of form fields: 'ESP action name' with the value 'My remove user action', and 'ESP connection' with a dropdown menu showing 'Episerver Campaign'. The 'ESP action type' section has three radio buttons: 'Send message', 'Remove user from group' (which is selected and highlighted in blue), and 'Add user to group'. At the bottom right, there's a 'Test ESP action' button next to an email input field containing 'you@domain.com'. At the very bottom, there are 'Cancel' and 'Save ESP action' buttons.

- a. **ESP action name.** Enter the action name.
 - b. **ESP action type.** Select **Remove user from target 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**.

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. In the **Configuration** tab, choose a trigger strategy.
4. Go to the **HTML and preview** tab.
5. Select **Episerver Campaign** as the **Email service provider**.
6. Click **Generate code**.

7. Copy the HTML code displayed in the window.

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: Episerver Campaign

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=a1b2c3d4&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=a1b2c3d4&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=a1b2c3d4&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=a1b2c3d4&rno=1&triggerFireId={externaltriggerid}"></a>
```

Generate code

Preview or send a test email

you@yourcompany.com

Preview email

Send test email

Save campaign

Cancel

© 2017 Episerver

8. Go to Episerver Campaign.

Note: To create a new mailing in Episerver Campaign, go to **Campaigns > Transactional mails** and following the instructions in Transactional mails in the Episerver User Guide.

9. From the main menu, go to **Campaigns > Transactional emails**.

10. Select your email campaign.

11. Click **Edit**.

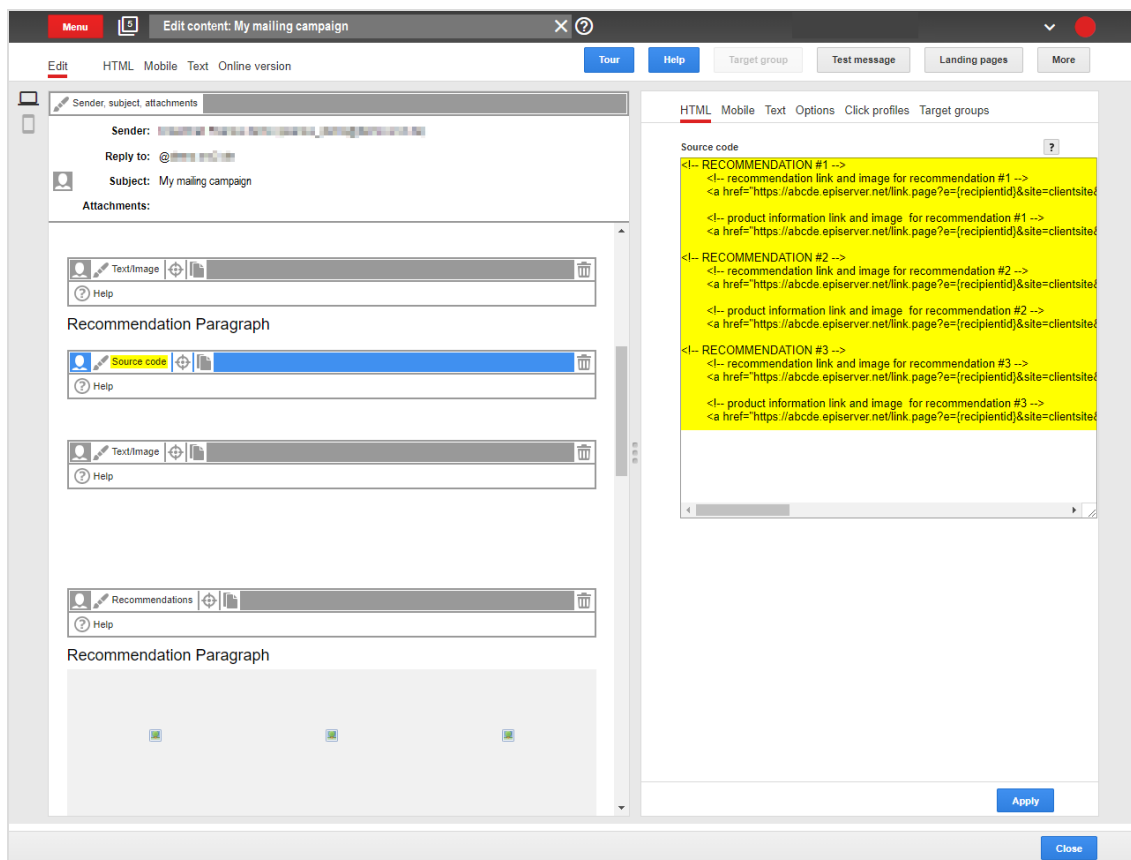
12. In the flow diagram that opens, click the campaign and click **Edit** (pencil icon).

13. Click **Edit content**.

14. 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*.

15. Click **Source code**.

16. Paste the HTML code (copied in step 6) into the right-hand panel:



17. Click **Apply**.

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).



www.episerver.com