Digital Experience Cloud

Episerver Email Recommendations

User Guide

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Episerver Email Recommendations User Guide

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Email Recommendations

This topic describes how to create and configure Email Recommendations widgets and generate the HTML links to insert into your email campaigns. Email Recommendations enriches a campaign by adding personalized product suggestions to the email template. Also, marketers can construct the entire email around personalized product suggestions for the ultimate 1-to-1 email communication. Email Recommendations dramatically increases click-through-rates and engagement to drive more revenue through the email channel.

Each Email Recommendations recipient gets dynamically generated, personalized product recommendations that are based on individual browsing behavior of the visitor on your website. So, each recipient gets personalized product suggestions that are relevant to the individual.

Use Email Recommendations in any type of email campaign: in marketing campaigns, and in transactional and automated triggered emails such as abandoned basket, welcome messages, order confirmation, order dispatched messages, and so on.

Configuring Email Recommendations is simple with numerous options for strategy, filter, and fine-tuning. The Email Recommendations tool is completely ESP-agnostic and there is no complex integration required.

Episerver tracking and Email Recommendations assign a unique Customer User ID (CUID) to any device the visitor is using to connect to your website. When a visitor identifies him- or herself on the site—by logging in, placing an order, or otherwise providing an email address, or by clicking a product recommendation in an email they received – Episerver automatically converts the CUID into a KUID (Known User ID), linking behavior tracked on the device to the user's email address. This enables instant delivery of product suggestions according to specified strategies, and the visitor's behavior.

If a visitor connects on another device, Episerver automatically connects the different CUIDs to a single KUID associated with that email address. In this way, personalization works consistently across the devices with which a visitor engages.

Product recommendations are delivered at the point of opening the email as two images:

- The actual product image from your own image library.
- The product information image, which shows text, such as the product title and price.

Just add Episerver HTML links to your campaign that generate the images within the campaign.

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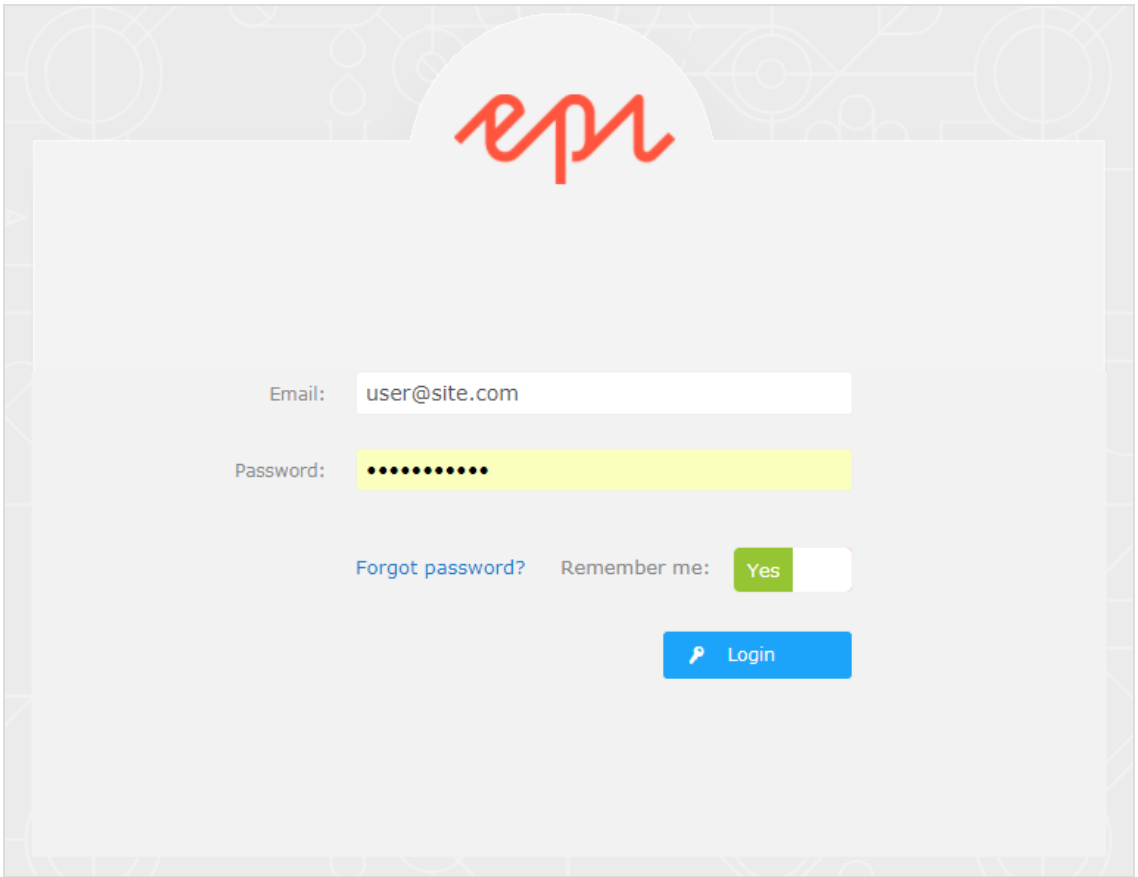
Accessing Email Recommendations

You can access Email Recommendations through the Episerver for the Personalization Portal.

1. Log in to the for the Personalization Portal with your credentials. If you do not have your login details, contact developersupport@episerver.com.



2. Click the **Mail** tab in the navigation bar. In the Email Recommendations interface, you can create new campaigns, and view or edit the Email Recommendations campaigns that you have already set up.

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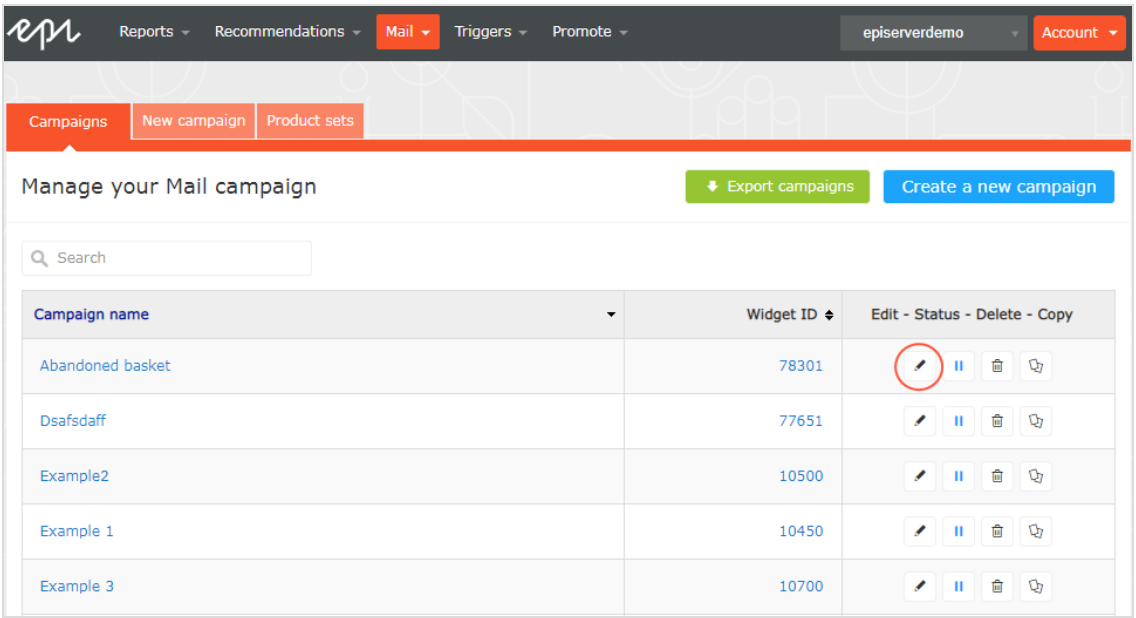

- **Edit**. Click **Edit** or a campaign name to open the configuration page for that campaign.
- **Status**. Click **Activate it** to switch on a campaign or **Pause it** to switch off a campaign.
- **Delete**. Click **Delete** to delete a campaign. A confirmation box appears.
- **Copy**. Click **Copy** to create a duplicate of an existing campaign. Then click **Edit** for the new campaign to make changes to it.

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Setting up a Email Recommendations campaign

To create a new Email Recommendations campaign, you can either click **Create a new campaign** from the Email Recommendations overview screen, or select the **Mail** > **New campaign** tab. The campaign editing screen appears. There are three main steps in the set-up process:

1. Styling the product information image
2. Configuring recommendation strategies
3. Previewing and generating the recommendations code

Styling the product information image

The **Style editor** step lets you configure the way the product information image appears for email recommendations. Your modifications are displayed in the **Preview** section.

- **Campaign**. The name of your Email Recommendations campaign.
- **Image**. Modify the dimensions (number of pixels) and background color (hexa-decimal values) of the product information image.

> Note: The size of the actual product image will not change because that image is delivered with the same size as it is provided from your system to Episerver in the product catalog feed.

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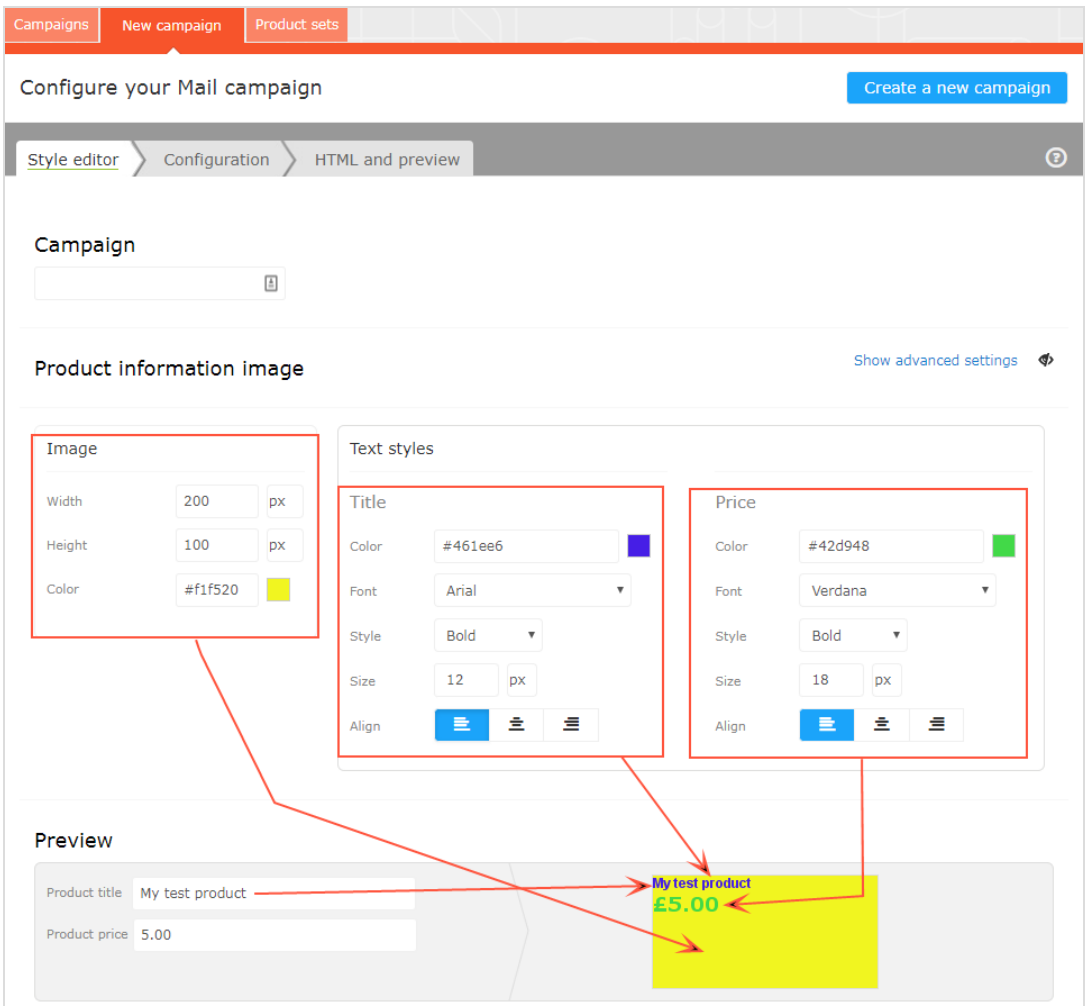
- The **Text styles** section defines the font attributes:
  - **Title**. Modify the font attributes and alignment of the product title.
  - **Price**. Modify the font attributes and alignment of the product price.



Click **Show advanced settings** to edit HTML and CSS for the image. You can edit other elements, such as displaying *Was* prices or product ratings. The product information image is rendered in a similar way that a browser does, so you can use standard HTML and CSS.

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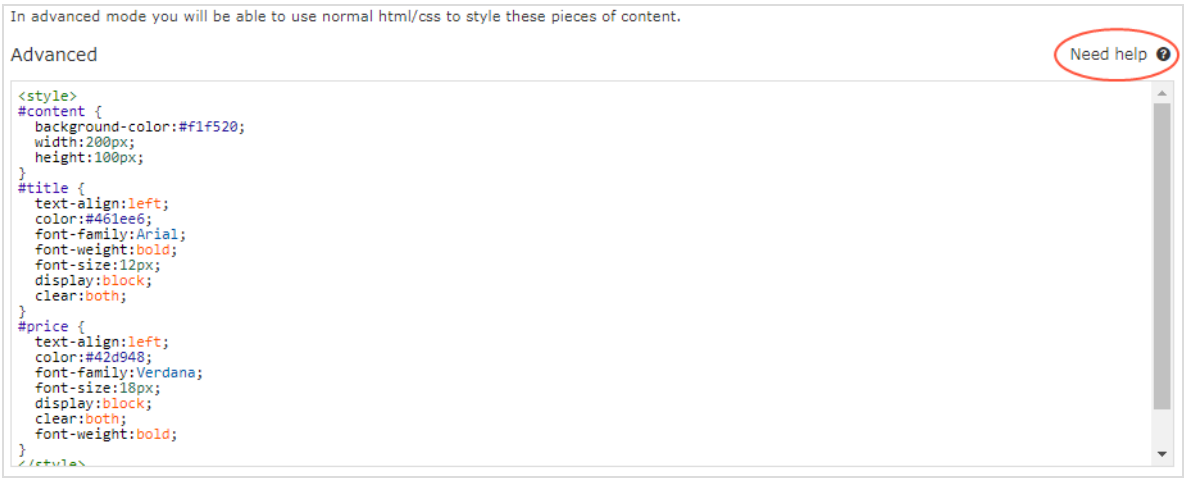

Click **Need help** for information about the syntax of variables and logical operations.

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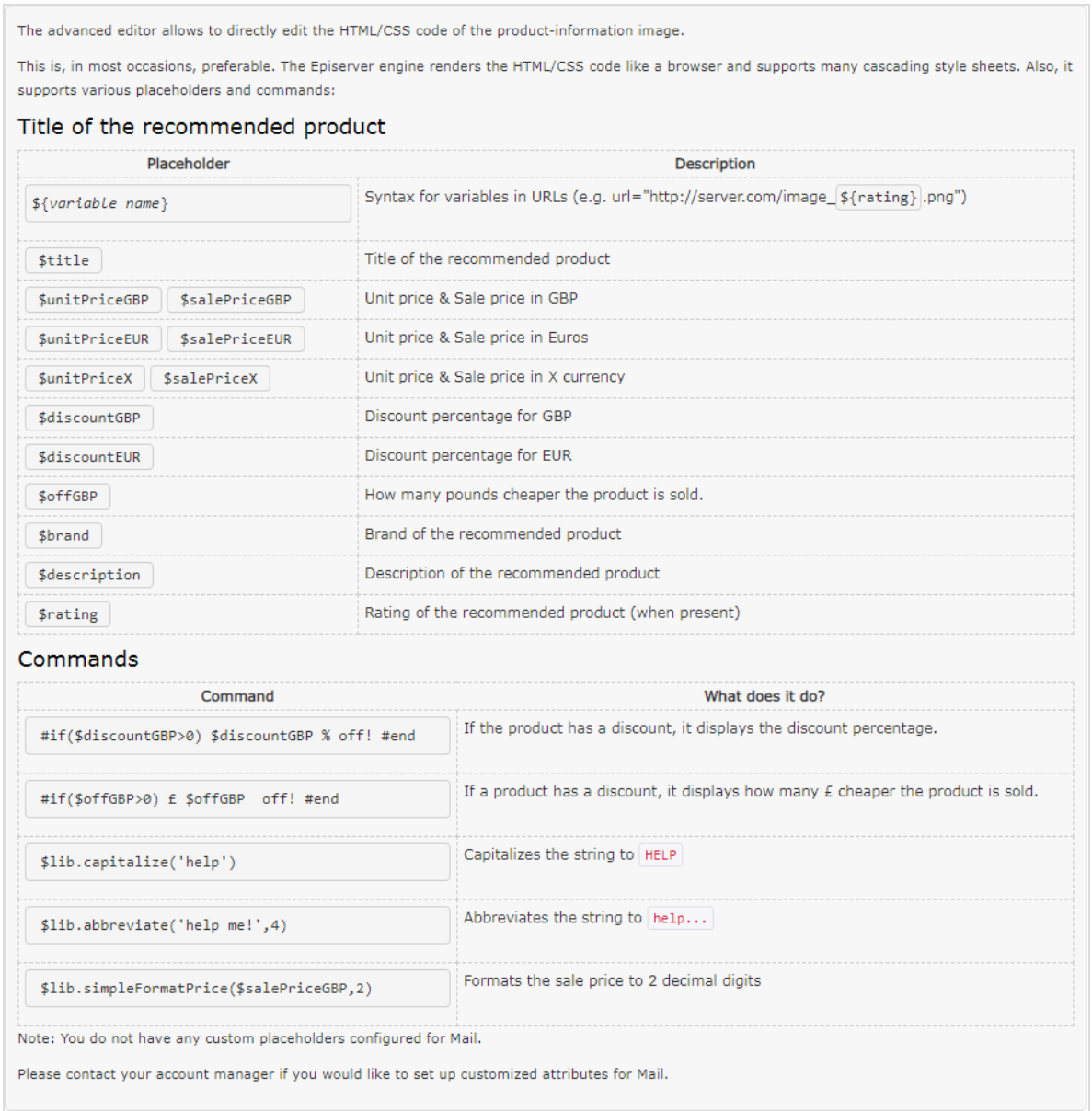

The advanced editor allows to directly edit the HTML/CSS code of the product-information image.

This is, in most occasions, preferable. The Episerver engine renders the HTML/CSS code like a browser and supports many cascading style sheets. Also, it supports various placeholders and commands:

Title of the recommended product

Placeholder	Description
`${variable name}`	Syntax for variables in URLs (e.g. url="http://server.com/image_`${rating}`.png")
`$title`	Title of the recommended product
`$unitPriceGBP` `$salePriceGBP`	Unit price & Sale price in GBP
`$unitPriceEUR` `$salePriceEUR`	Unit price & Sale price in Euros
`$unitPriceX` `$salePriceX`	Unit price & Sale price in X currency
`$discountGBP`	Discount percentage for GBP
`$discountEUR`	Discount percentage for EUR
`$offGBP`	How many pounds cheaper the product is sold.
`$brand`	Brand of the recommended product
`$description`	Description of the recommended product
`$rating`	Rating of the recommended product (when present)

Commands

Command	What does it do?
`#if($discountGBP>0) $discountGBP % off! #end`	If the product has a discount, it displays the discount percentage.
`#if($offGBP>0) £ $offGBP off! #end`	If a product has a discount, it displays how many £ cheaper the product is sold.
`$lib.capitalize('help')`	Capitalizes the string to `HELP`
`$lib.abbreviate('help me!',4)`	Abbreviates the string to `help...`
`$lib.simpleFormatPrice($salePriceGBP,2)`	Formats the sale price to 2 decimal digits

Note: You do not have any custom placeholders configured for Mail.

Please contact your account manager if you would like to set up customized attributes for Mail.

Select the **Configuration** step next.

Configuring email recommendations strategies

In the **Configuration** step, specify how many products you want to appear in the Email Recommendations campaign, specify localization settings, add third-party tracking code, and configure the recommendation strategies.

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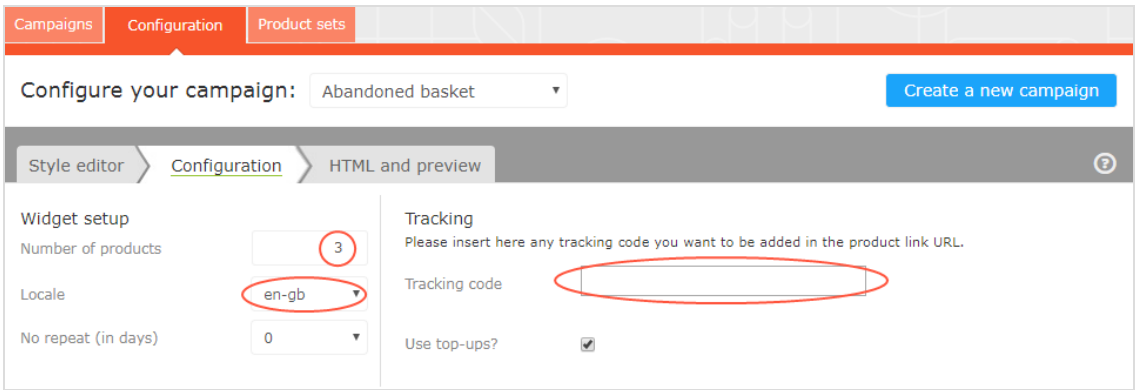
1. Set the number of products you want to display in the campaign in the **Number of products** field.
2. If your site is multi-lingual and is being tracked under a single account in the Episerver for the Personalization Portal, select the appropriate locale for the Mail campaign. The **Locale** field refers to the language to be used in the text of the product recommendations.

> **Note**: Each campaign should be specific per locale (such as dk, en, se, and so on), and only products that have the locale should be recommended. This is so email recipients get only products that the customer can buy, and not products that might be sold in only some countries or locales where the customer cannot make a purchase. You also can use other filter attributes (such as **allowedcountry** or **exceptioncountry**) to ensure recipients get the best recommendation.

3. If you want to add third-party analytics code to the product recommendations to track their performance in tools such as Google Analytics, Coremetrics, Omniture and so on, add the tracking parameter generated by your preferred analytics tool in the **Tracking code** field.



4. In **No repeat (in days)**, set the number of consecutive days that recommendations are not repeated in multiple emails for the same campaign. For example, if you sent a *Daily Deals* type of email and you want to ensure that the recommendations are different, you can select *No repeat in 3 days*. This ensures that if the same user sees the same campaign multiple times in 3 days, e user will see different recommendations.

The visual editor displays the number of positions you chose to set up.

In each of the positions, you can choose one or more different strategies available. The strategies in each position are independent of each other. So, you can apply a different strategy or combination of strategies to each position.

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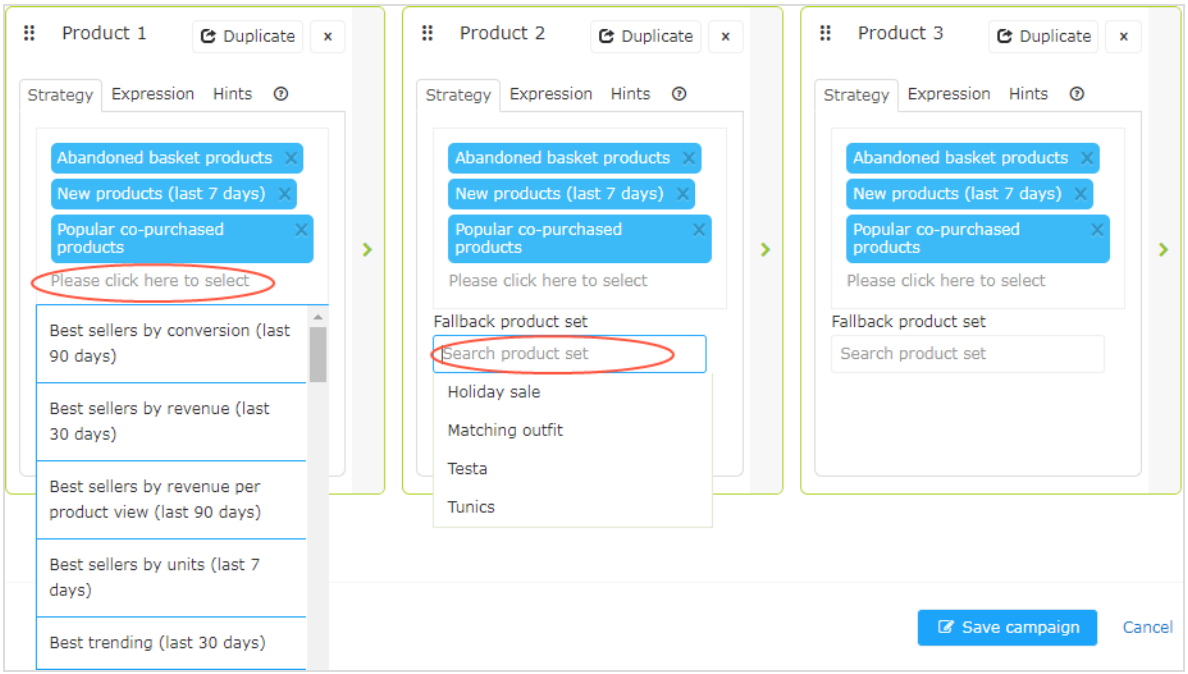
Click a Strategy field and scroll through the drop-down list. (You can start typing in the name of a strategy to filter the list.) When you find the strategy you want, click its name to add it to the product position.



You can stack strategies for each position, one after the other, so that the system finds products that match the first strategy in the top line first. If that strategy returns no products, the next strategy in the stack is tried, and so on, until the position is filled. For example, a strategy stack might look like this:

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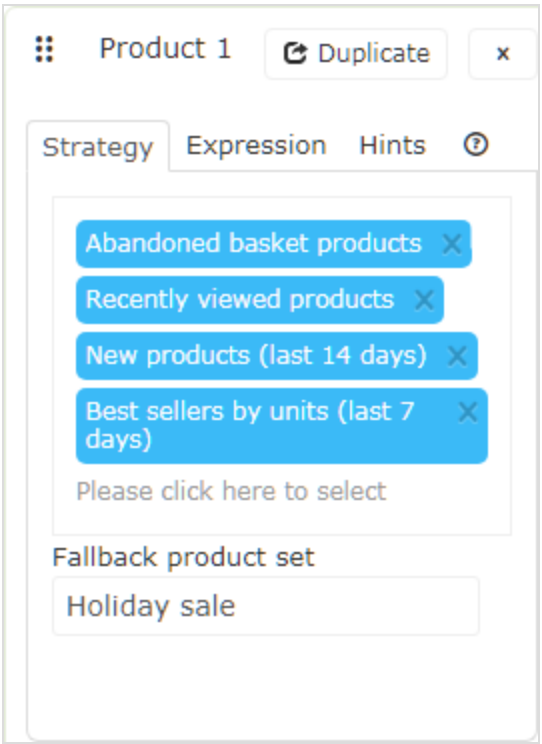

In this example, Episerver searches for products that were abandoned by the user (based on the email address of the recipient, having browsed or purchased on the site using the same email address). If no product was found, Episerver uses the second strategy line to find recently viewed products. If it does not find any recently viewed products, it finds new products (recently added to the site) from the past 14 days, and so on, until a matching product is found. See Creating a product set for information about product sets.

> **Note**: The example strategy also has a fallback product set specified.

- **Reorder the stack of strategies**. Drag and drop a strategy up or down in the list.
- **Reorder product positions**. Grab the button in the top left and drag it to the desired order.
- **Duplicate**. Click Duplicate to copy the same strategy stack in another product position.
- **Delete**. Click **X** in the top right corner.

To ensure that there is never a blank position in the Email Recommendations campaign, you can do either of the following actions:

- **Fallback product set**. Select a product set from a list of pre-selected products that can appear in the recommendations if none of the strategies return a result.

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> **Note**: Fallback product sets and top-ups will not follow hints or expressions applied to the product position.

- **Use top-ups** check box. Ensures that the system displays a best seller from the last 7 days, if none of the strategies in the stack return a result.

Personalized and merchandised recommendation strategies

You can use over 30 different strategies in Email Recommendations, singularly or in combination.

- **Personalized strategies**. Depend on the association of personal web behavior to an individual email address. For example, *recently viewed* and *abandoned basket* are linked to actions that an visitor has completed on the website.
- **Merchandised strategies**. Relate specifically and only to products. For example, *best sellers*, *best trending*, and *new products* do not depend on whether the email recipient saw the products.

The following table shows example personalized and merchandised strategies.

Personalized	Merchandised
Abandoned basket products	Best trending (last 30 days)
Cross-sells from previous purchases and views	Best sellers by units (last 7 days)
Newly discounted products from viewing history	Best sellers by revenue (last 30 days)
Popular co-purchased products	New products (last 7/14/30 days)
Recently viewed products	

You should adopt a combination of personalized and merchandised strategies to ensure that emails are optimized to generate the best sales returns.

There is no single best answer for which stack of strategies generates the most engagement because this varies on a client-by-client basis. The nature of what is being sold or offered on a site also is an important consideration because this has a direct bearing on which strategies it is best to deploy. For example, a fashion site will have completely different buying behavior to a site that sells building supplies. A fashion site retailer may want to focus strategies on as much personalization as possible, while a building supplies retailer may want to focus more on the merchandised strategies available that are

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devised based on the crowd behavior captured. Over time, more emails are personalized as Episerver associates web behavior to further email addresses.

To see a full list of strategies, expressions, and hints, click **Help** in any product position to open the Help section.

Filtering strategy results using expressions and hints

To narrow and restrict the recommended products in your Email Recommendations campaigns, add rules in the expression and hints sections for each product position. These rules work in conjunction with the configured recommendation strategies by filtering the strategy output using the specified parameters.

- **Expressions**. Explicit rules that the recommended products must match to appear to the email recipient. Expressions ensure that certain product attributes are included in the selection. For example, if you were to use the *Recently viewed* strategy, you could specify an expression to show only those products that were recently viewed and are from a specific brand or category you want to push. To use a certain product attribute in expressions, pass the attribute and value to Episerver in the product catalog feeds imported for your site.
- **Hints**. While expressions let you filter by a specific product attribute and its value, and are configured for each product position individually, use **hints** as a broader rule to take into account what other products are recommended in the same campaign. For example, if you use the *Recently viewed* strategy, you may want to exclude items that were previously purchased (*recent purchase*), or show products from the same category. You can do this with a hint (but not with an expression because *recent purchase* is not a product attribute provided in product catalog feeds).

Adding an expression

To add an **expression** to an individual product position:

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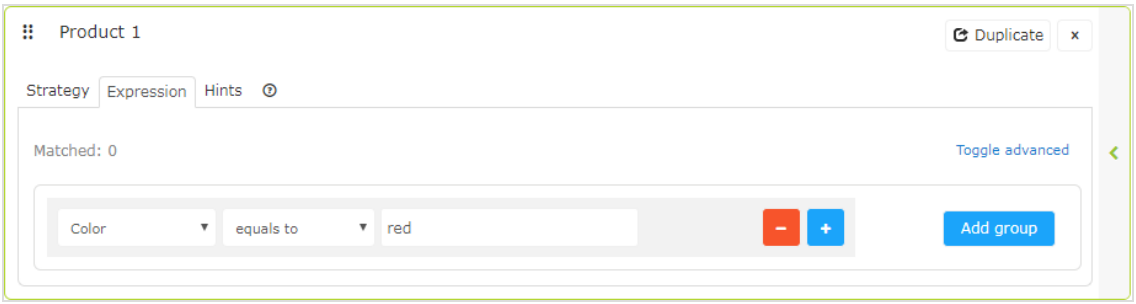
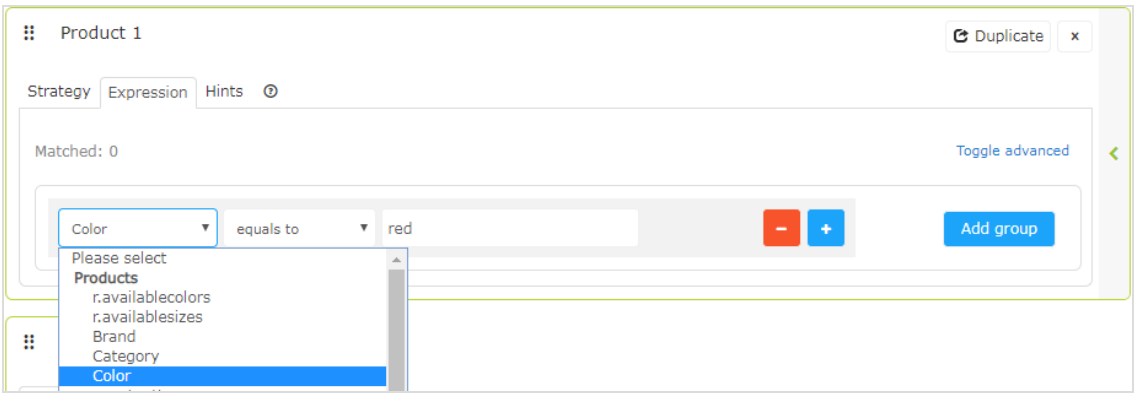
1. Select the **Expression** tab for the desired position.



2. Open the first drop-down list and select the attribute (such as *color*) that you want in the rule (based on the product catalog feed, plus a few attributes Episerver created by default). If you do not see the attribute that you want, you can add it to your product catalog feed.



3. Select the condition you want in your rule.
   - For attributes that have a text value, such as *Color* or *Brand*, select **equals to** or **NOT equals to**.
   - For attributes with a numeric value, such as *Sale price* or *Unit price*, you also can use comparison operators like **greater than** or **less than**.
4. In the text field on the right, enter the value of the attribute that is evaluated in this rule. You can start typing in the box to filter the results.

> **Note**: Most attributes have a drop-down list with possible values when you select the text field. For numeric values (such as prices) you will not see a pre-populated list and you will need to enter the value manually.

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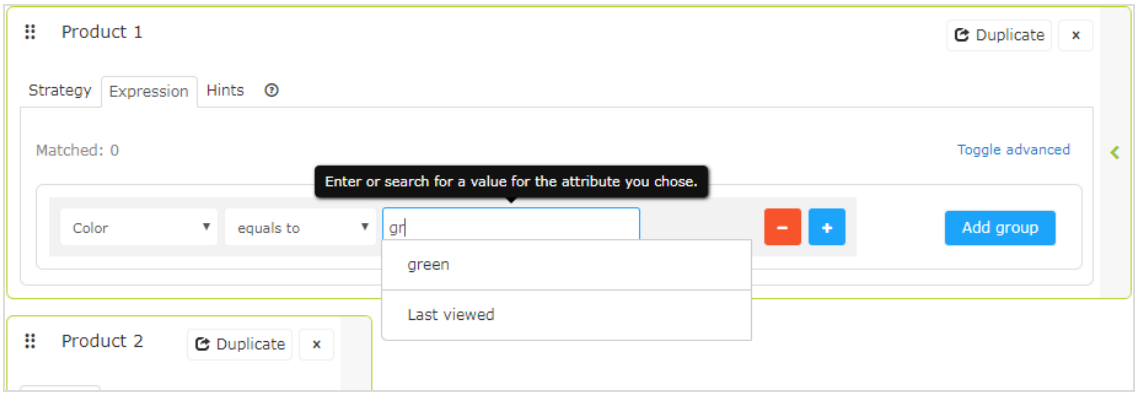


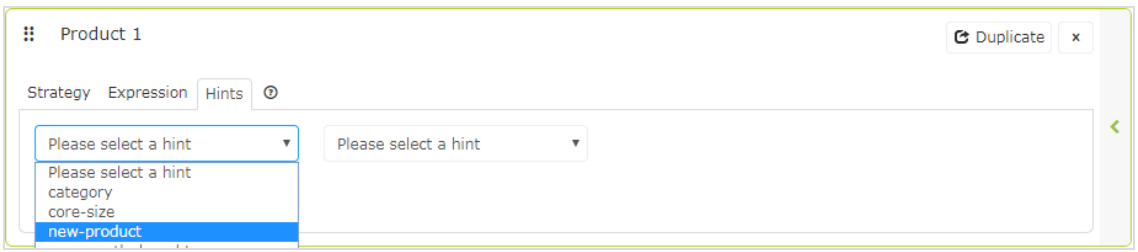
5. You can add multiple rules for the same position by clicking **Add group** or plus **+**. When using multiple rules, you can choose to apply one or more of them to the product position, by setting the **AND** or **OR** operator.

   To remove a rule, click minus **-** next to it.

Adding a hint

To add a **hint** to an individual product position:

1. Select the **Hints** tab for the desired position.
2. In the drop-down lists select the hint you want to apply. You can apply up to two hints for each product.



You can use hints and expressions in combination, but be aware that the more you add, the more you restrict the range of products from which to choose to generate useful recommendations.

When you have configured the products in the campaign, click **Save campaign**.

Select the **HTML and preview** step next.

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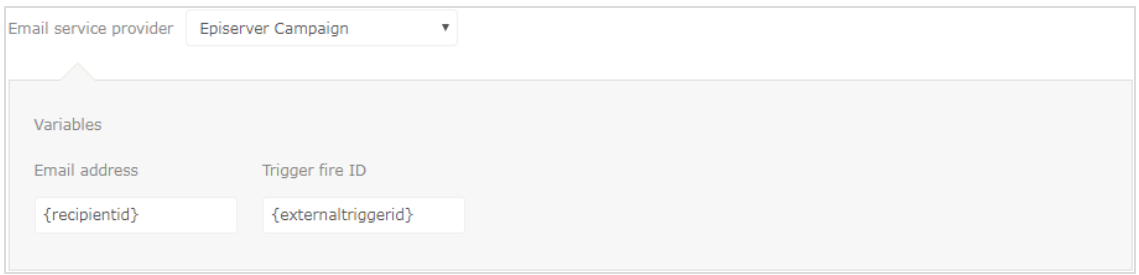
Previewing and generating the recommendations code

The **HTML and preview** step lets you generate the code that is added to your email template, and lets you preview the output of the mail recommendations widget.

Generating the HTML code to add to your template

1. Select your ESP (email service provider) from the drop-down list to populate the fields for the **Variables**.

   If you do not see your ESP, you can manually insert your ESP email variable in the **Email address**s variable field. This information is available from your ESP, so contact your ESP account manager or support team, if you are unsure what the correct variable is. (Depending on your client setup, you may see additional fields for other variables; for example, if you have triggered messages and used a trigger strategy in your Email Recommendations campaign, a **Trigger fire ID** variable field will be present.)

   > **Note**: The **Email address** variable is required to let Episerver identify the user by their email to serve personalized recommendations that are specific to the user. Upon sending an email, your ESP populates the variable in the link with the recipient's email address. If the variable is not present or is incorrect, Episerver is not informed of the user's email address, and therefore cannot personalize the recommendations.

2. After the variable is populated, click **Generate code**.The generated HTML code appears.

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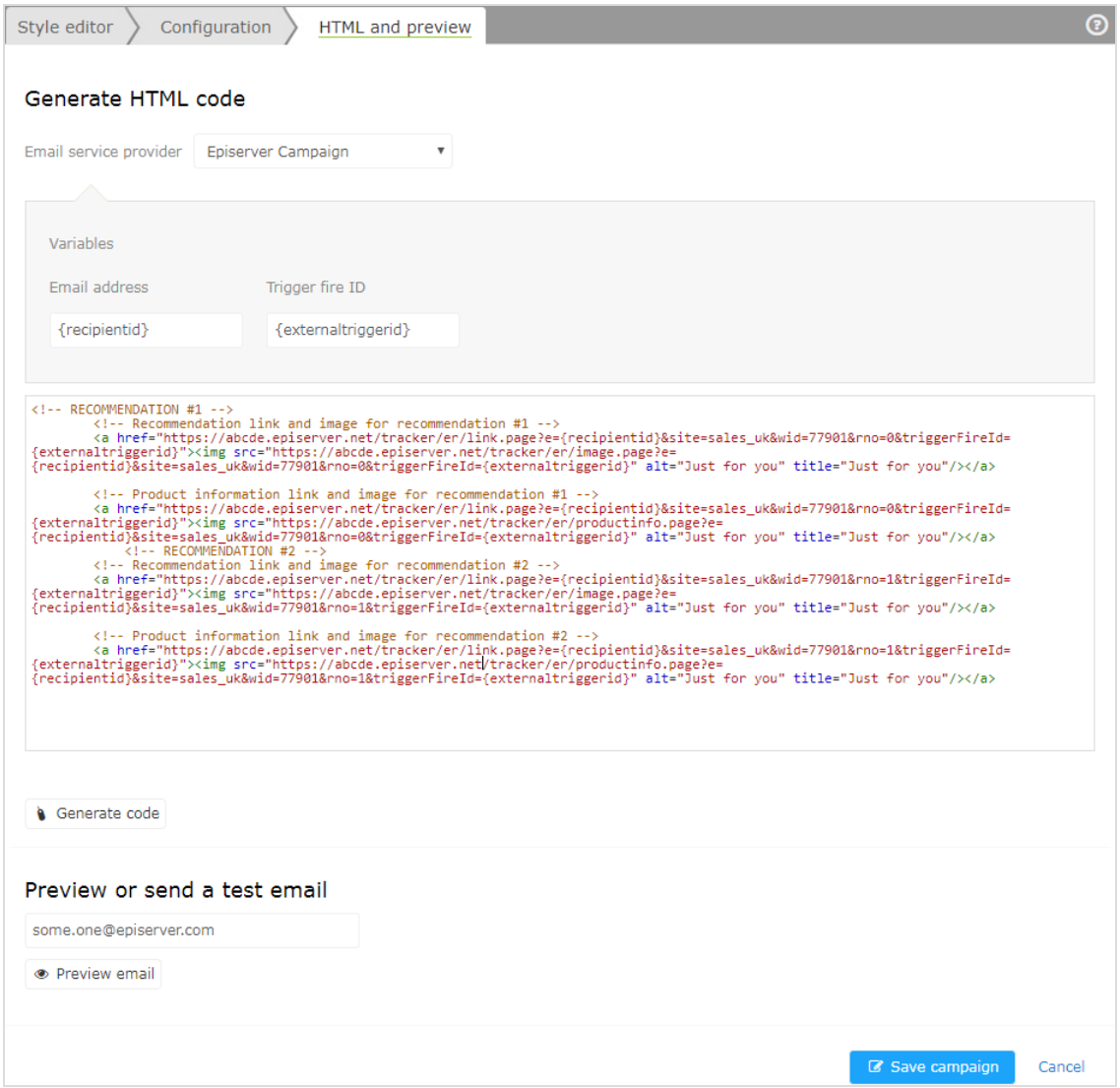

3. Copy and paste the HTML code into your email template to retrieve recommendations.

   The generated HTML code is annotated to clearly show the links for each product recommendation. Each recommendation consists of two images (the product image and the product information image), and each of these is commented so you have the flexibility to use the images in the way you want to best fit your template design.

   The generated code does not include any other formatting. You can add HTML and CSS in your template to style the recommendations, such as adding them to a table or resizing the product images.

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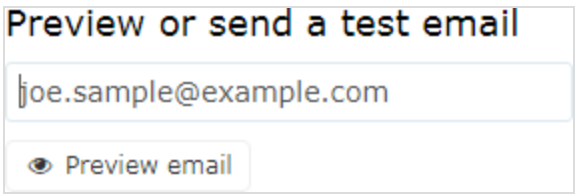
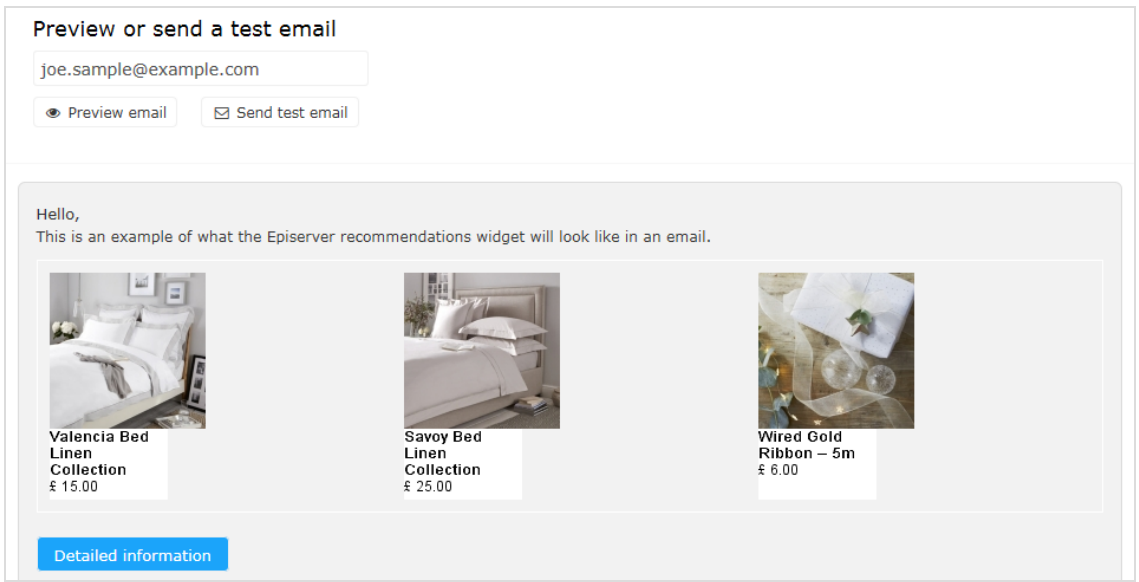
Previewing your campaign

To preview the output of the configuration you have set up, you can choose one of the following options:



- Preview the email recommendations within the for the Personalization Portal (showing recommendations below the **Preview email** button).



- Send a test email to your email address to view the recommendations within a basic email template. You must enter your email address in the field above the **Send test email** button beforehand.

When you preview the recommendations in for the Personalization Portal, a sample output appears for the email address you entered. You can try out different email addresses to see how the recommendations may look for different users.

You can view information about the recommended products in the preview. Click **Detailed information** below the recommendations to open a new browser tab or window; detailed information appears for each recommended product, and the strategy that generated the recommendation.

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Widget : Reach - Abandoned Basket	
Recommendations	
refCode: padding:site:site:2705: algorithm:Product Catalog	
createdDate	Thu Jan 01 00:00:00 UTC 1970
Title	-
Categories	
Attributes	
Prices	
GeneratioStrategy	Best sellers by units (last 7 days)
Algorithm	CATALOG
Image	
Debug	
refCode: padding:site:site:2705:sales_uk:algorithm:Product Catalog	
createdDate	Thu Jan 01 00:00:00 UTC 1970
Title	-
Categories	
Attributes	
Prices	
GeneratioStrategy	Best sellers by units (last 7 days)
Algorithm	CATALOG
Image	
Debug	
https://[redacted]tracker/er/debugInfo.page?e=some.one%40episerver.com&site=sales_uk&wid=77901&isPreview=true&triggerId=-1&refCodes=	

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Email Recommendations strategies

The following table shows Email Recommendations strategies.

Strategy	Description
Abandoned basket products	Shows products that were added to the basket but not purchased. Only baskets abandoned within the last 90 days and products currently available are considered.
Best sellers by conversion (last 90 days)	Show best sellers based on conversion rate from the last 90 days, and the categories that the customer viewed.
Best sellers by revenue (last 30 days)	Show products that generated the most revenue on site in the last 30 days. This strategy also takes categories into account; that is, it gives bias to products that sold well, and are in the same category with which the customer has most interacted.
Best sellers by revenue per product view (last 90 days)	Show products that generated the most revenue per numbers of views in the last 90 days. This strategy also takes categories into account; that is, it gives bias to products that sold well, and are in the same category with which the customer has most interacted.
Best sellers by units (last 7 days)	Show best sellers based on number of products sold in the last 7 days.
Best trending (last 30 days)	Show products that are gaining popularity; that is, whose unit sales are growing the most in the last 30 days.
Best trending based on previous purchases and views	Show products that are gaining popularity; that is, whose unit sales are growing the most, based on the customer's previously viewed products and purchase history.
Co-purchased products based on previous purchases	Show products that other customers also ordered when purchasing the same product as the customer, and that are in any category from which the customer has purchased.
Co-purchased products based on	Show products bought together with products the customer has in their wish list.

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Strategy	Description
wishlist	
Co-viewed products based on wishlist	Show products viewed together with products the customer has in their wish list.
Cross-sells from previous purchases and views	Show products bought together with products the customer bought and viewed in the past.
New Products (last 7/14/30 days)	Show products recently added to the site (in the last 7, 14 or 30 days).
New products from purchased categories (last 120 days)	Show new products from categories from which the customer previously made a purchase (in the last 120 days).
Newly discounted products based on viewing history	Show recently discounted products related to products that the customer previously viewed.
Newly discounted products from viewing history	Show recently discounted products that the customer previously viewed.
Popular co-purchased products	Show popular items based on the customer's purchased products (biased towards the most recently bought product).
Popular products based on previous purchases and views	Show popular items from categories from which the customer recently made a purchase. If not enough are found from purchased categories, it shows popular products from categories that the customer recently viewed.
Popular products based on recent views	Show popular products based on the customer's recently viewed products.
Popular products from categories related to previous purchases	Show popular items from categories that are related to categories from which the customer made a purchased.

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Strategy	Description
Popular products from co-purchased and purchased categories	Show products that other customers bought together with the same product as the customer, and are in the same or related category from which the customer made a purchase.
Popular products from co-purchased categories	Show products that other customers bought together with the same product as the customer, and are in a related category from which the customer made a purchase.
Products from daily trigger campaigns	Used only with Triggers. Show products from daily trigger campaigns, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned-basket.
Products from in-session trigger campaigns	Used only with Triggers. Show products from in-session trigger campaigns, such as Abandoned basket, Abandoned browse, Abandoned checkout.
Recently purchased products	Show products the customer purchased, the most recent first.
Recently viewed products	Show products the customer recently viewed.
Recommendations based on abandoned basket	Show related products based on the customer's abandoned basket items (biased towards the most recently abandoned product).
Recommendations based on the customer's popular views	Show popular products from categories that the customer browsed most.
Recommendations based on daily trigger campaigns	Used only with Triggers. Show related products based on the daily trigger used, such as Targeted discounts, High product interest, Post purchase, Low-in-stock abandoned-basket.
Recommendations based on in-session trigger campaigns	Used only with Triggers. Show related products based on the in-session trigger used, such as Abandoned basket, Abandoned browse, or Abandoned checkout for the current session.
Recommendations based on recent	Show popular items based on products the customer added to basket.

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Strategy	Description
basket additions	
Recommendations based on specified product refCodes	Show recommendations based on what other customers purchased or viewed with the specified products. To use this strategy, a client needs to fill the value of the **refCode** variable in Mail recommendations links with product refCodes (for example, from a customer's order) and then the recommendations returned are based on those refCodes.
Recommendations from the category specified in Hints	Show products from a particular category, which needs to be specified in the **Hints** section using the hint category.

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Example Email Recommendations campaigns

This section lists examples of Email Recommendations strategy stacks to use in various types of email campaigns.

BAU newsletter

Selection of personalized products for use in BAU (business as usual) newsletters:

- Abandoned basket products
- Recently viewed products
- Recommendations based on abandoned basket
- Popular products based on recent views
- Cross-sells from previous purchases and views
- Popular products based on previous purchases and views
- Best sellers by conversion (last 90 days)
- Other merchandising strategies or Fallback product set

Welcome email

Selection of personalized products for use in Welcome emails:

- Cross-sells from previous purchases and views
- Popular products based on previous purchases and views
- Recently viewed products
- Newly discounted products from viewing history
- Abandoned basket products
- Recommendations based on abandoned basket
- Best sellers by revenue per product view (last 90 days)
- Other merchandising strategies or Fallback product set

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Abandoned basket

Selection of personalized recommended products for use in Abandoned Basket emails:

- Recommendations based on abandoned basket
- Cross-sells from previous purchases and views
- Popular co-purchased products
- Newly discounted products from viewing history
- Popular products from categories related to previous purchases
- Recently viewed products
- Best sellers by conversion (last 90 days)

Order update/cross sell

Selection of personalized products for use in order updates or cross-sell emails sent to users who have purchased on the site:

- Cross-sells from previous purchases and views
- Popular co-purchased products
- Newly discounted products from viewing history
- Popular products based on previous purchases and views
- Co-purchased products based on previous purchases
- Popular products from categories related to previous purchases

Other campaigns and high-level strategy suggestions

- **Marketing emails and newsletters**
    - **Weekly or monthly newsletters**

      Show a selection of products to the customer based on the following strategies:

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- Abandoned basket products
- Recently viewed products
- Recommendations based on abandoned basket
- Cross-sells from previous purchases and views
- Popular products based on previous purchases and views

If the customer is new to the site (that is, does not have enough behavior tracked by Episerver), the customer is presented with best trending items on the site and best sellers based on crowd behavior.

◦ **Announcement emails**

- **New arrivals**. Similar to the strategies above but boosting products recently added to the site (use the hint new-product).
- **Sale**.

  - Presenting only items on sale
  - A selection of products that a customer viewed on the site and that since were discounted
  - Items on sale related to the customer's browsing and purchasing behavior
  - Abandoned basket products
  - Recommendations based on abandoned basket.

  If the customer is new, the customer is presented with popular products on sale and best sellers on the site based on units, revenue, conversion and revenue per product view.

◦ **Events/competition emails**

Show a selection of popular products from the customer's favorite categories:

- Popular co-purchased products
- Abandoned basket products
- Recommendations based on abandoned basket
- Best trending products in the customer's favorite categories

If the customer is new, the customer is presented with best sellers and new products on site.

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- **Loyalty/reward newsletters**
  - Cross-sells to previously viewed and purchased products
  - Popular items from favorite categories
  - Abandoned basket products
  - Recommendations based on abandoned basket
  - Recently viewed products
  - Best sellers in favorite categories

- **Transactional and system emails**
  - **Registration /account creation confirmation emails**.
    - Cross-sells to previously viewed and purchased products
    - Popular items from viewed and purchased categories
    - Recently viewed products
    - Abandoned basket products
    - Newly discounted products from viewing history
    - Best trending products in favorite categories

    If the customer is new, the customer is presented with a mix of Best trending and Best selling items.
  - **Order confirmation**
    - Cross-sells to the purchased items
    - Popular co-purchased products
    - Recommendations based on abandoned basket
  - **Order dispatched**
    - Cross-sells to the purchased items
    - Popular co-purchased products
    - Recommendations based on abandoned basket
  - **Abandoned basket/browse**
    - Recommendations based on the abandoned products.
    - Customer's previous buying and viewing behavior.

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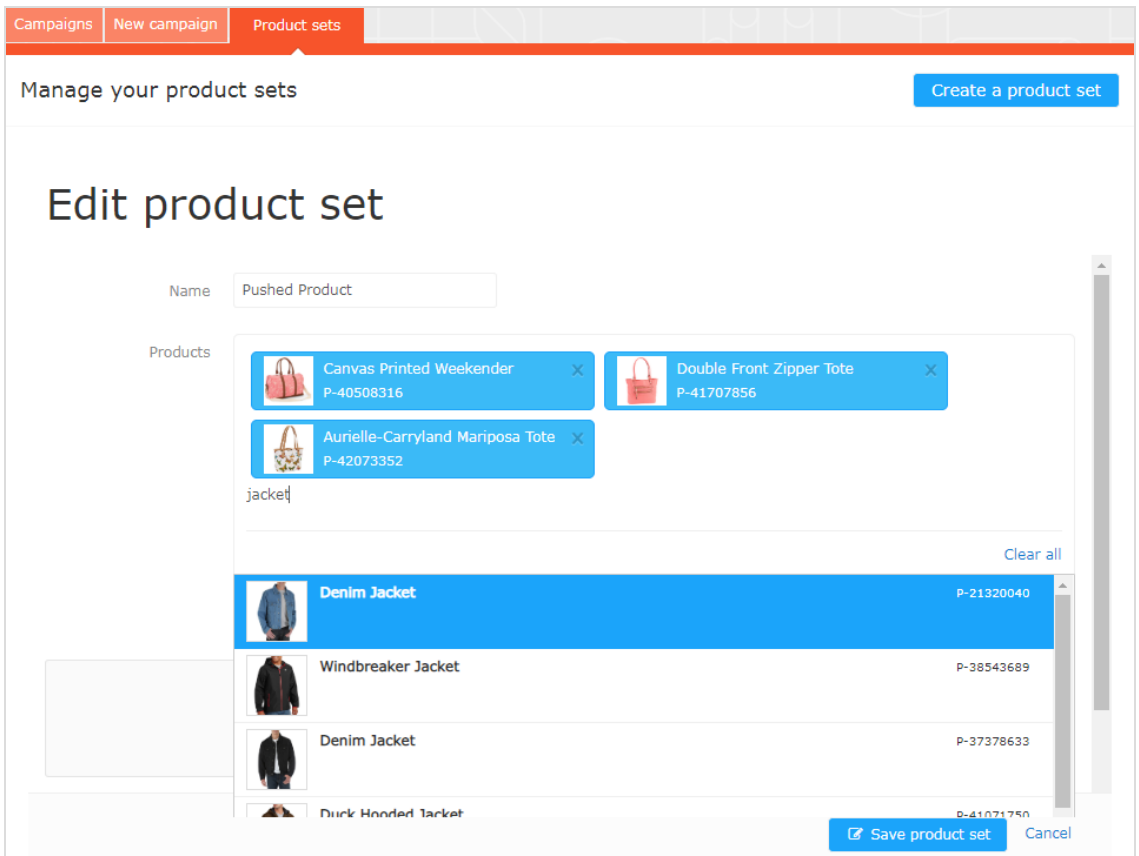
Creating a product set

You can group products that you want to promote or sell, and you can use product sets in expressions. To create a product set:

1. Select the **Product sets** tab.
2. Click **Create a product set**.



3. Enter a name for the product set, such as *Holiday Sale*.
4. Add products to a set in the following ways:
   - Enter the whole or partial name (such as *jacket*) or the refCode of a product in the **Products** field. A list of results appear. Click a product (like *Denim Jacket*) to add it.
   - Enter space in the **Products** field and available products appear for you to select by clicking each product.

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- Drag and drop a CSV file (or click and select the file) in the **Upload a CSV file** space.

> **Note:** A product set can contain up to 200 products.

5. Click **Save product set**. Your new product set appears in the list, where you can edit, delete, and copy the sets.

Name	Image	Products	Edit - Delete - Copy
Popular product		P-39101253	
Pushed Product		P-21320040, P-37378633, P-40508316, P-41707856, P-42073352	

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Exporting and importing Email Recommendations campaigns

This topic describes how to export and import Email Recommendations campaigns with a CSV file.

If you have campaigns built across different markets and locales and you want to make a change affecting all or some of your active campaigns, you can create a master CSV file that contains the configuration of all your active campaigns. You can edit and import changes into the for the Personalization Portal.

> **Note**: You should first export campaigns to keep the proper format, then make changes and import the updated file. Do not prepare CSV files on your own.

Exporting Email Recommendations campaigns

1. From the **Mail** > **Campaigns** view, click **Export campaigns**. The **Exporting campaigns** dialog box appears.

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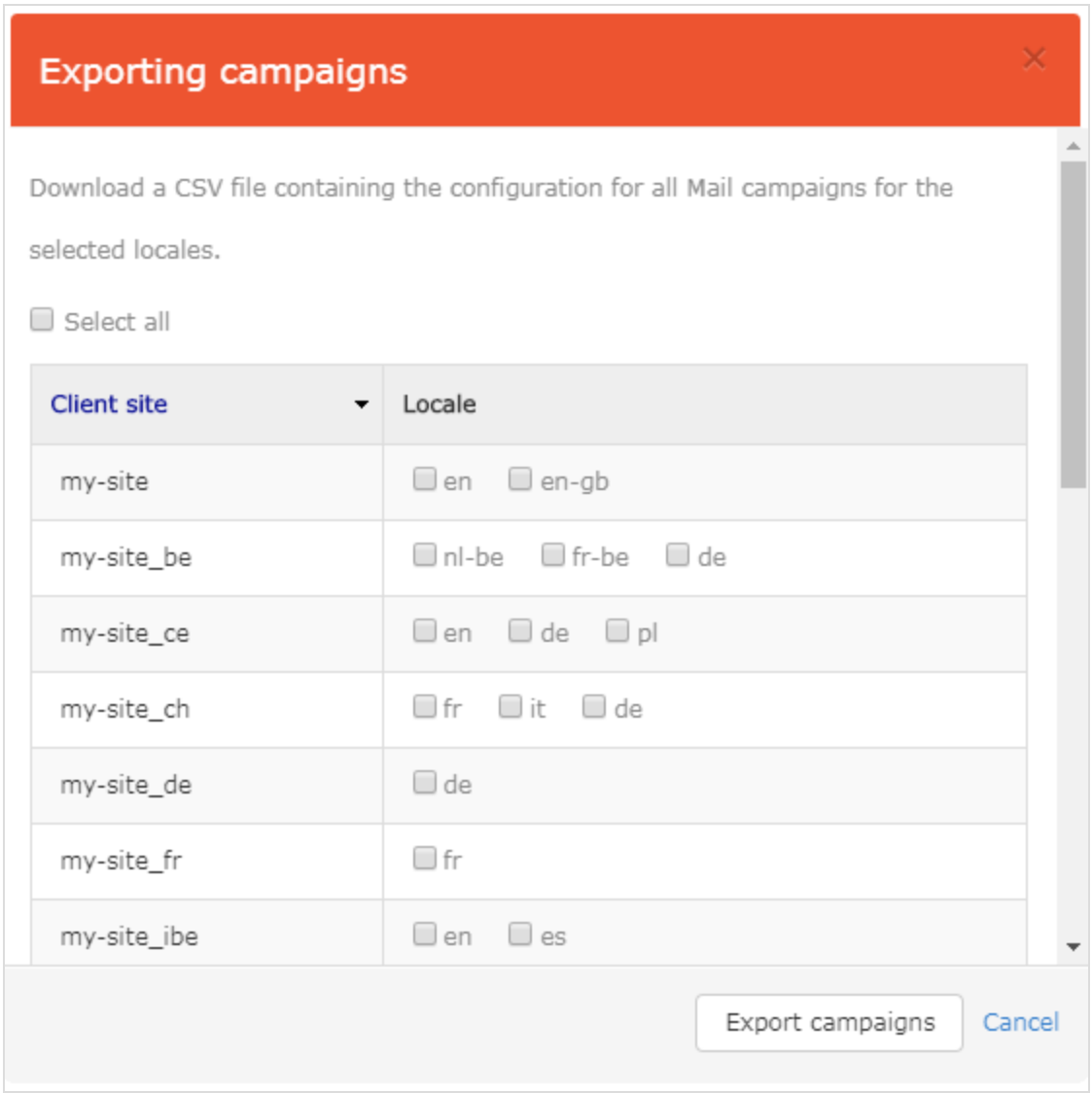

2. Enable **Select all** to download every client in all locales, or enable just the Client site and Locales you want to export to a CSV file.
3. Click **Export campaigns** to create the CSV file.

Making changes to the CSV file

You can open the CSV file in Microsoft Excel.

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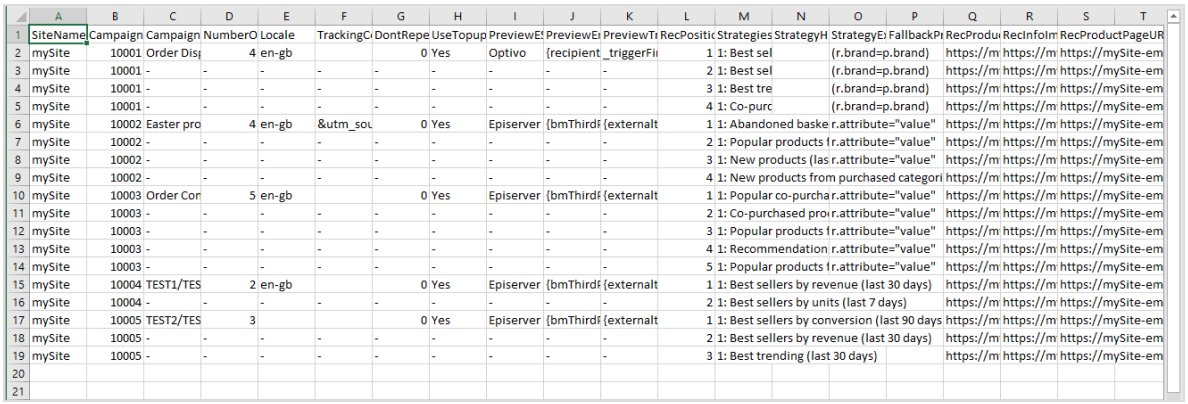

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	SiteName	Campaign	Campaign	NumberO	Locale	TrackingC	DontRepe	UseTopup	PreviewES	PreviewEr	PreviewTr	RecPositic	Strategies	StrategyH	StrategyEx	FallbackPr	RecProdu	RecInfoIm	RecProductPageUR	
2	mySite	10001	Order Disp	4	en-gb		0	Yes	Optivo	{recipient	_triggerFi	1	1: Best sel		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
3	mySite	10001	-	-	-	-	-	-	-	-	-	2	1: Best sel		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
4	mySite	10001	-	-	-	-	-	-	-	-	-	3	1: Best tre		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
5	mySite	10001	-	-	-	-	-	-	-	-	-	4	1: Co-purc		(r.brand=p.brand)		https://m	https://m	https://mySite-em	
6	mySite	10002	Easter pro	4	en-gb	&utm_sou	0	Yes	Episerver	{bmThirdF	{externalt	1	1: Abandoned baske		r.attribute="value"		https://m	https://m	https://mySite-em	
7	mySite	10002	-	-	-	-	-	-	-	-	-	2	1: Popular products f		r.attribute="value"		https://m	https://m	https://mySite-em	
8	mySite	10002	-	-	-	-	-	-	-	-	-	3	1: New products (las		r.attribute="value"		https://m	https://m	https://mySite-em	
9	mySite	10002	-	-	-	-	-	-	-	-	-	4	1: New products from purchased categori				https://m	https://m	https://mySite-em	
10	mySite	10003	Order Con	5	en-gb		0	Yes	Episerver	{bmThirdF	{externalt	1	1: Popular co-purcha		r.attribute="value"		https://m	https://m	https://mySite-em	
11	mySite	10003	-	-	-	-	-	-	-	-	-	2	1: Co-purchased pro		r.attribute="value"		https://m	https://m	https://mySite-em	
12	mySite	10003	-	-	-	-	-	-	-	-	-	3	1: Popular products f		r.attribute="value"		https://m	https://m	https://mySite-em	
13	mySite	10003	-	-	-	-	-	-	-	-	-	4	1: Recommendation		r.attribute="value"		https://m	https://m	https://mySite-em	
14	mySite	10003	-	-	-	-	-	-	-	-	-	5	1: Popular products f		r.attribute="value"		https://m	https://m	https://mySite-em	
15	mySite	10004	TEST1/TES	2	en-gb		0	Yes	Episerver	{bmThirdF	{externalt	1	1: Best sellers by revenue (last 30 days)				https://m	https://m	https://mySite-em	
16	mySite	10004	-	-	-	-	-	-	-	-	-	2	1: Best sellers by units (last 7 days)				https://m	https://m	https://mySite-em	
17	mySite	10005	TEST2/TES	3			0	Yes	Episerver	{bmThirdF	{externalt	1	1: Best sellers by conversion (last 90 days				https://m	https://m	https://mySite-em	
18	mySite	10005	-	-	-	-	-	-	-	-	-	2	1: Best sellers by revenue (last 30 days)				https://m	https://m	https://mySite-em	
19	mySite	10005	-	-	-	-	-	-	-	-	-	3	1: Best trending (last 30 days)				https://m	https://m	https://mySite-em	
20																				
21																				

Within the CSV file, for the columns before **RecPosition** (column L), a hyphen represents duplicated values. For example, in the previous image, the value in cells C3, C4, and C5 (-) are duplicates of the value in cell C2 (*Order Dispatch*). If you change the value in C2, then C3, C4, and C5 inherit the changed value also.

You can make changes only to the following fields (Column ID added):

- C. CampaignName
- F. TrackingCode
- G. DontRepeatRecsForDays
- H. UseTopups
- I. PreviewESP
- J. PreviewEmailVariable
- K. PreviewTriggerId
- M. Strategies
- N. StrategyHints
- O. StrategyExpression
- P. FallbackProductSet

> **Note**: Do not add new campaigns to the CSV file. If you add new campaigns to the CSV file, you will receive an error message and the CSV file will not be imported. To add a new campaign, copy or create a new one in the Personalization Portal before exporting the CSV file.

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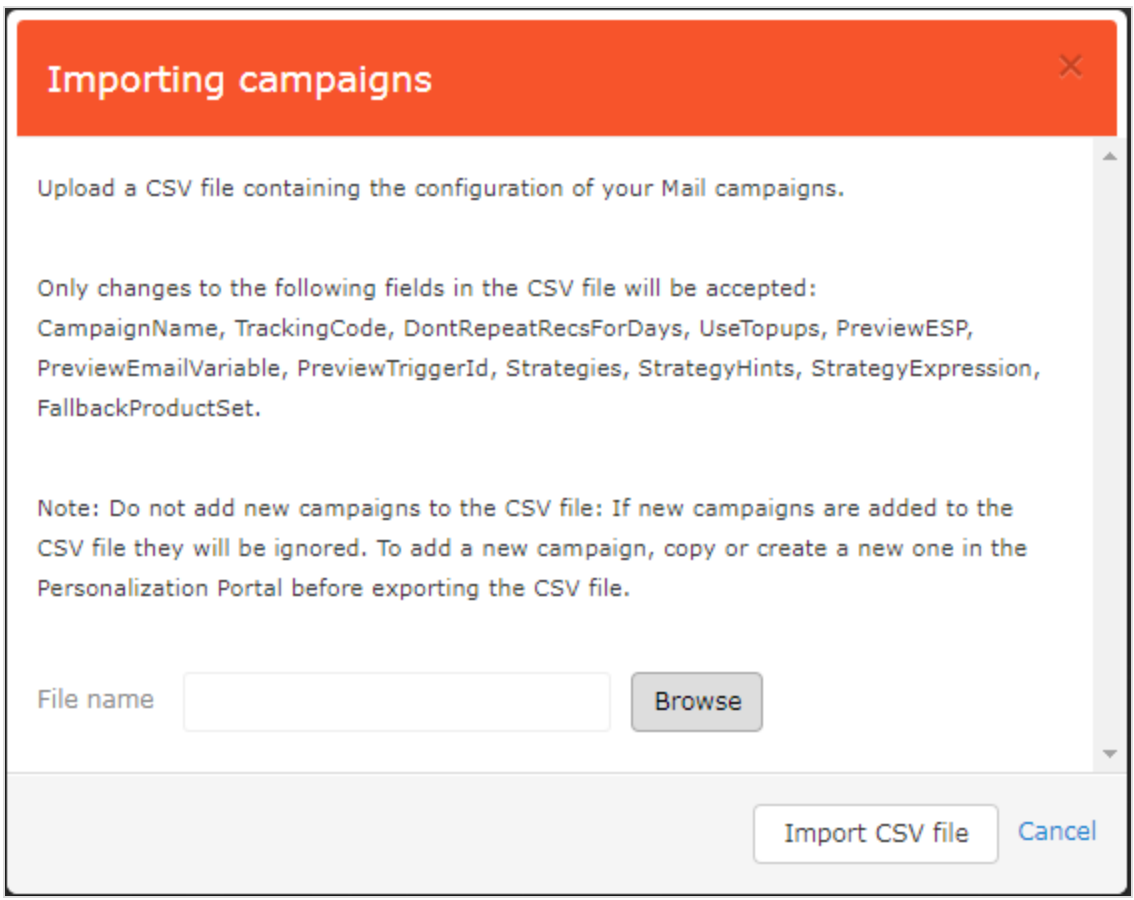
Importing Email Recommendations campaigns

> **Note**: The updated fields in the imported campaign configuration in the CSV file overwrite their respective fields in the existing campaign configurations for the specified client sites and locales in the CSV file.

After you modify the exported CSV file, import the file as follows.

1. From the **Mail** > **Campaigns** view, click **Import campaigns**. The **Importing campaigns** dialog box appears.



2. Click **Browse**, then select a CSV file that contains your campaign configurations.
3. Click **Import CSV file**.

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Triggered Messages

You can 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 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 Triggered Messages 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 Triggered Messages can work with any ESP, so you can migrate Triggered Messages and Email Recommendations to any provider that you might select.

By using Triggered Messages 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 Email Recommendations, 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.

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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 an Email Recommendations 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 an Email Recommendations 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 an Email Recommendations 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 an Email Recommendations 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.

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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. Use alone or combine it with another in-session trigger.

Setting up a Triggered Messages campaign

Each Triggered Messages 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 Triggered Messages campaigns. Furthermore, each Triggered Messages campaign must have an associated Email Recommendations campaign that uses an appropriate trigger strategy. See Setting up a triggered Email Recommendations campaign.

Creating a new Triggered Messages campaign

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

1. Enter a name for your Triggered Messages 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.

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> 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).

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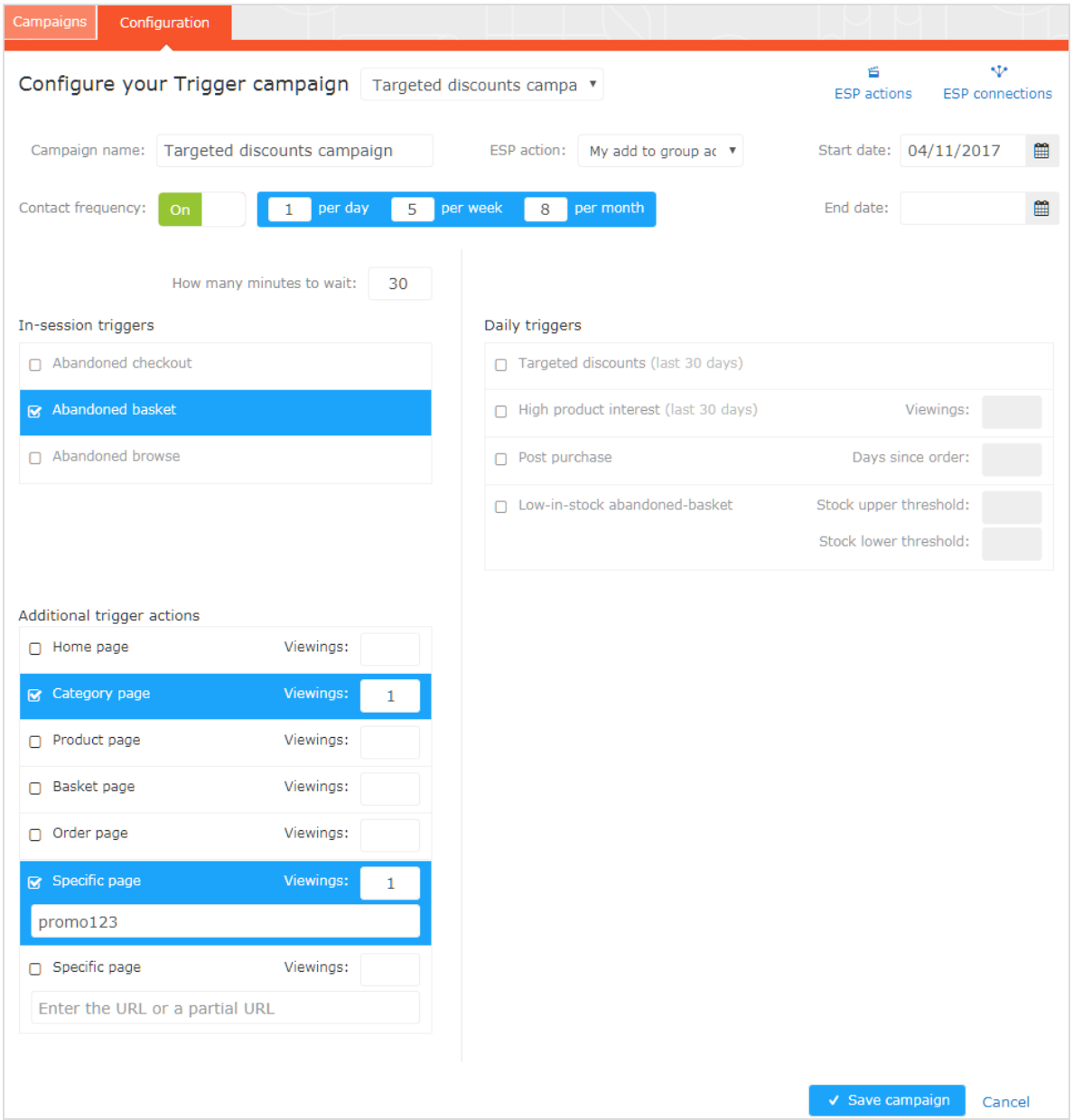

Setting up an ESP connection

Episerver must connect to the ESP's API so that when Triggered Messages 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.

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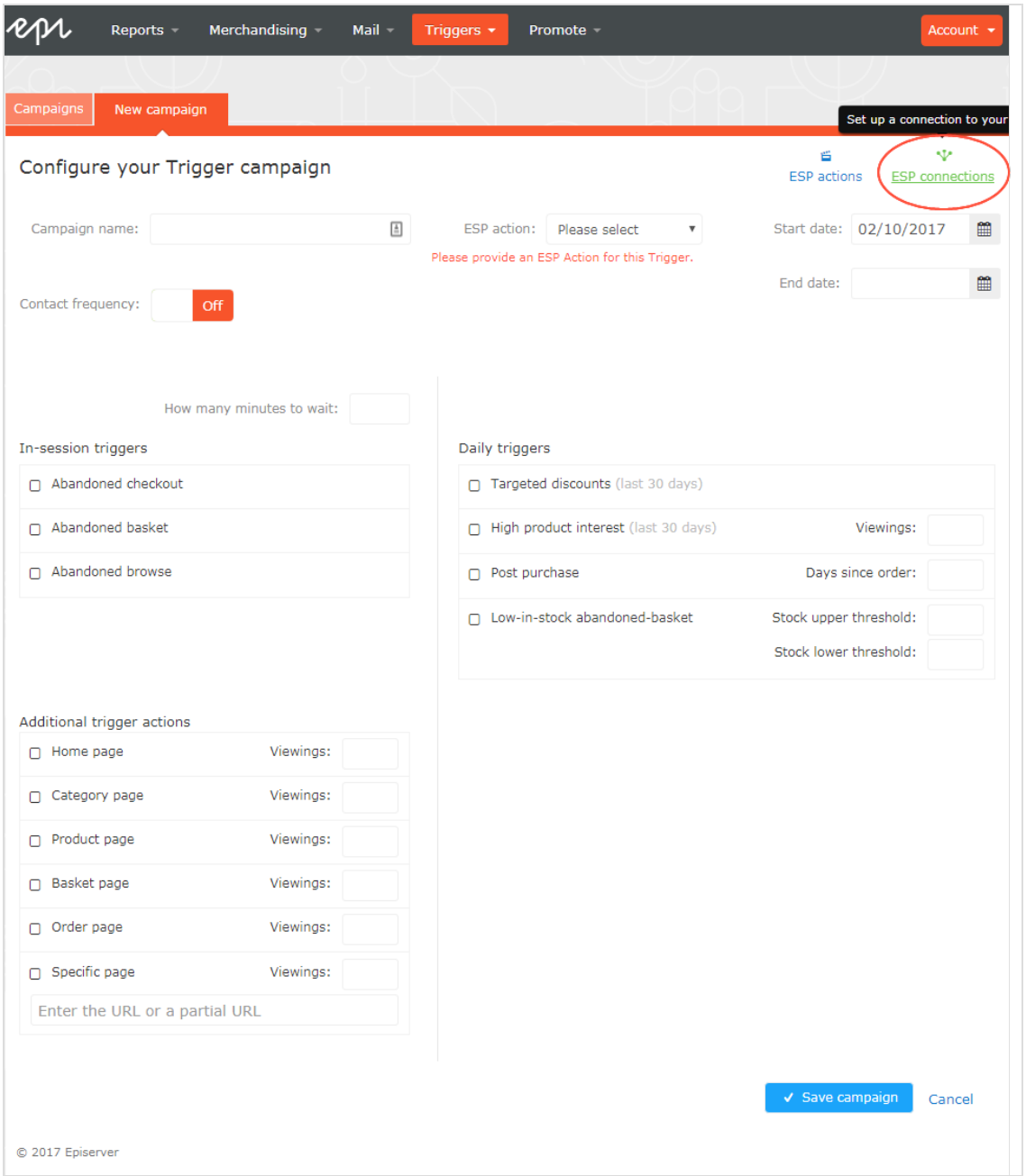
2. Select the **New campaign** tab and then click **ESP connections** in the top right.



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.

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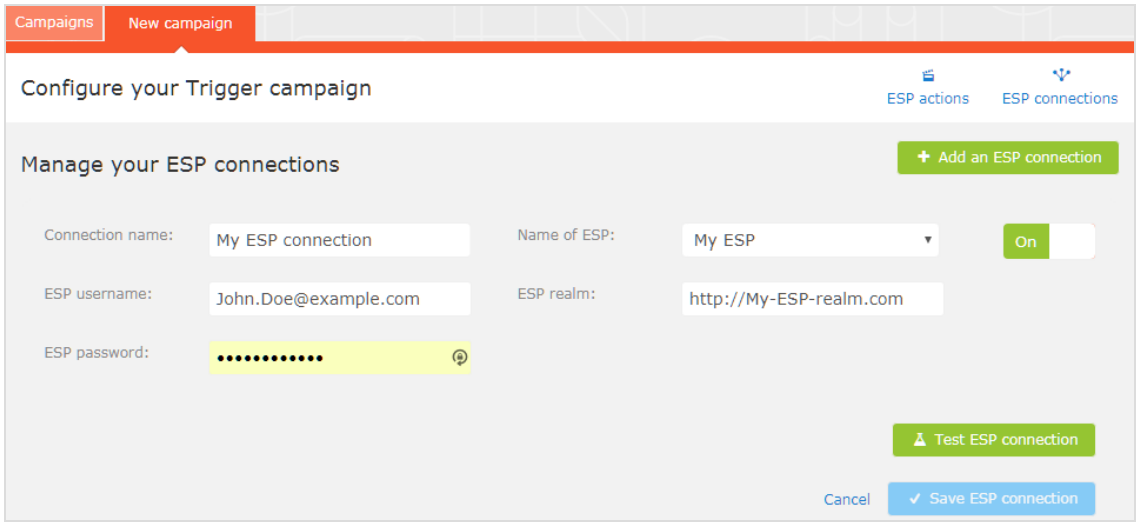

4. To create a connection:
   a. Enter your API credentials for your ESP account (such as username, password, database, realm, API token).
   b. Click **Test ESP connection** to test the connection.
   c. Click **Save ESP connection**.

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.

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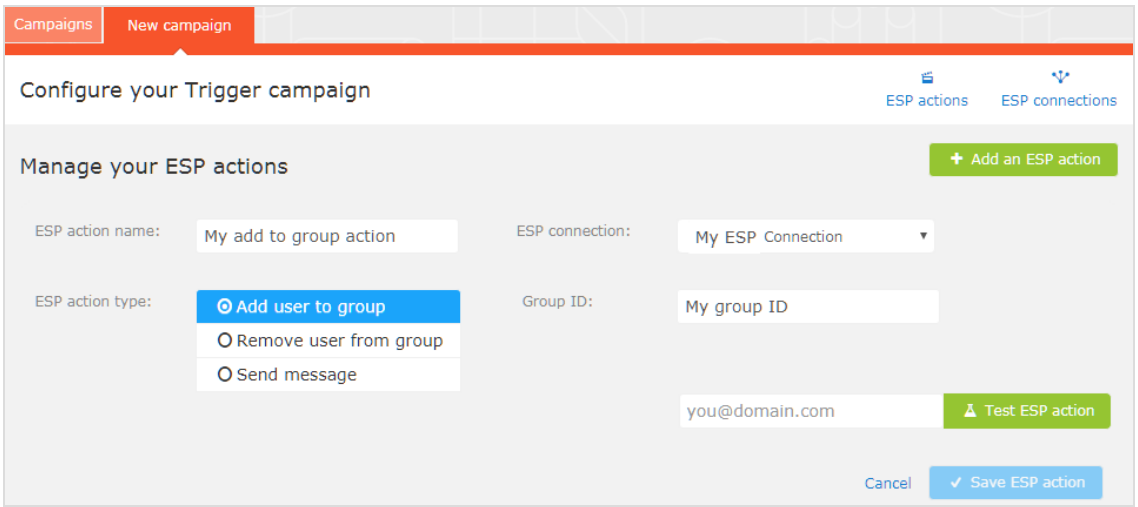
> **Note**: These fields are dynamic and will differ depending on the chosen **ESP connection** and the chosen **ESP action type**.



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.

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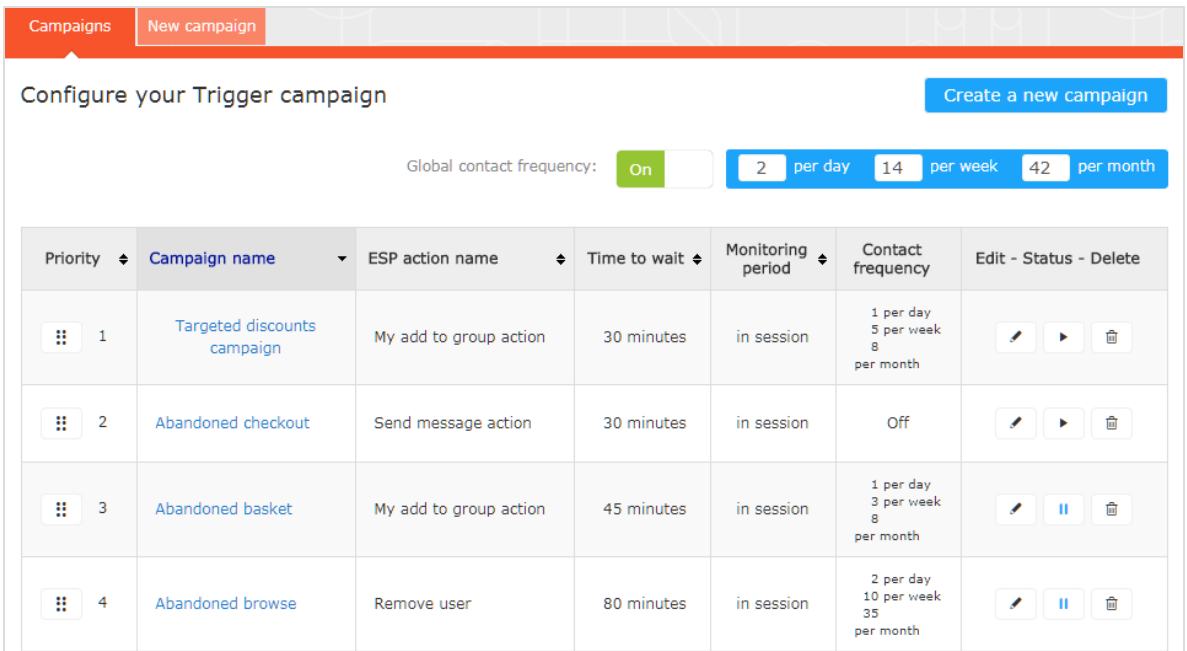
For developer information, see Link to a specific basket on Episerver World.

Managing Triggered Messages campaigns

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

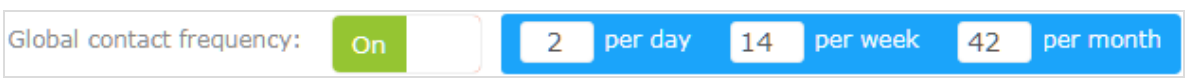
This page allows you to do the following:

- Set a Global contact frequency.
- Edit a Triggered Messages campaign.
- Activate/deactivate a campaign.
- Delete a campaign.
- Prioritize Triggered Messages campaigns.



Global contact frequency

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



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> 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 Triggered Messages 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 Triggered Messages is paused.
- **Delete**. Click **Delete** to delete a campaign. A confirmation box appears.

Prioritizing trigger campaigns

On the **Campaigns** page, you can sort your Triggered Messages 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. Trigger prioritization occurs whenever two or more triggers criteria are met at the same time. The priority order is especially important if you restrict the number of times a trigger 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).

Daily triggers are analyzed once a day, and the same daily trigger can fire more than once. For in-session triggers, when using the **Send message** ESP action, only one in-session trigger is allowed per session; when using the **Add user to group** and **Remove user from group** ESP actions, multiple in-session triggers can fire per session.

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.

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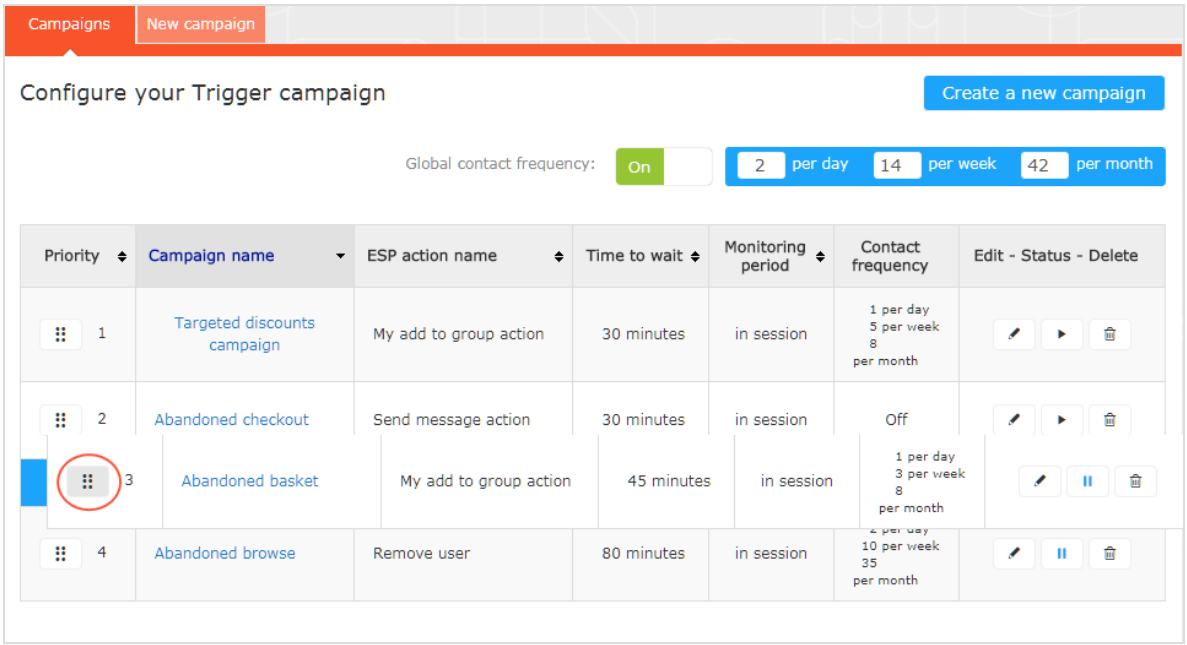

Setting up a triggered Email Recommendations campaign

You can create an Email Recommendations 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 Email Recommendations campaign, see .

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 Email Recommendations 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.

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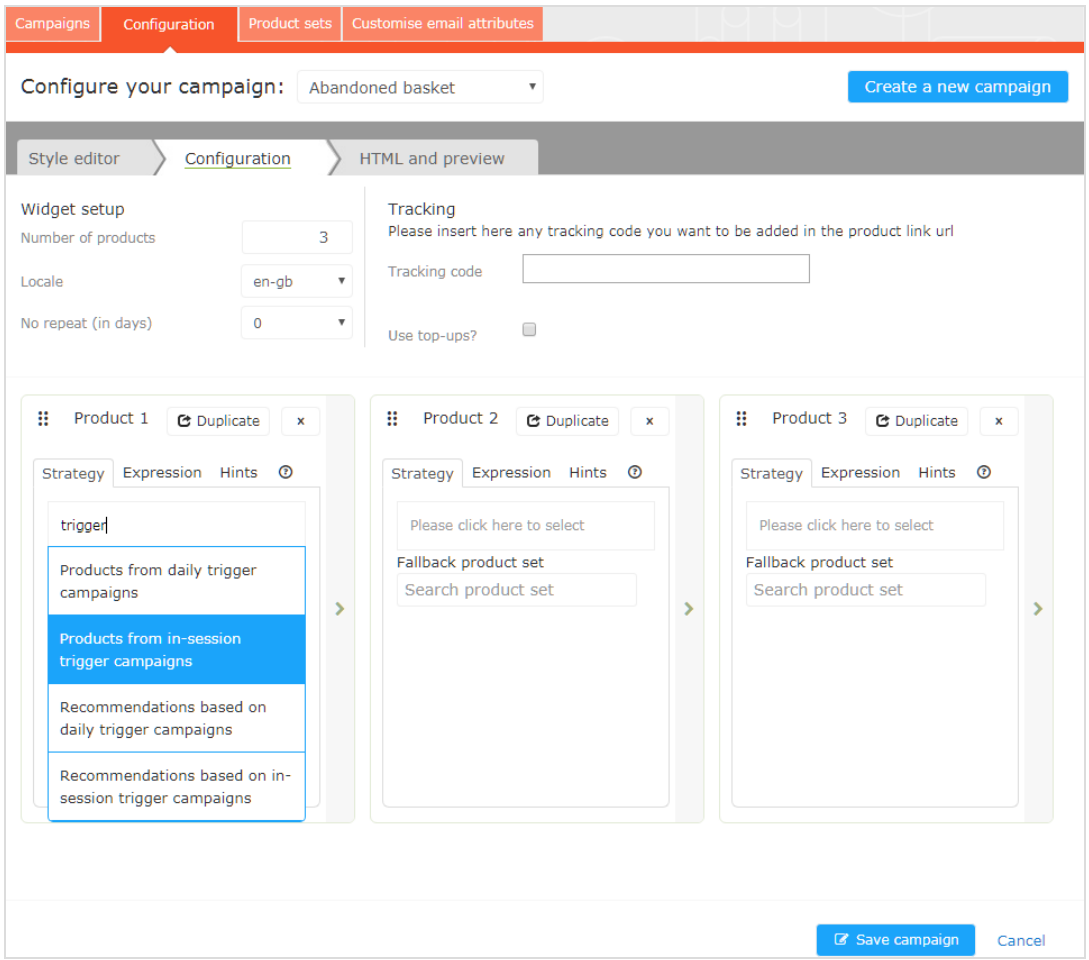
- **Recommendations based on daily trigger campaigns**. Returns related products based on the trigger used, such as Targeted discounts, High product interest, Post purchase, Low-in-stock Abandoned-basket.
- **Recommendations based on in-session trigger campaigns**. Returns related products based on the 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 Email Recommendations campaign. Select the correct ESP in the **Email service provider** drop-down list, so that the correct place-holders 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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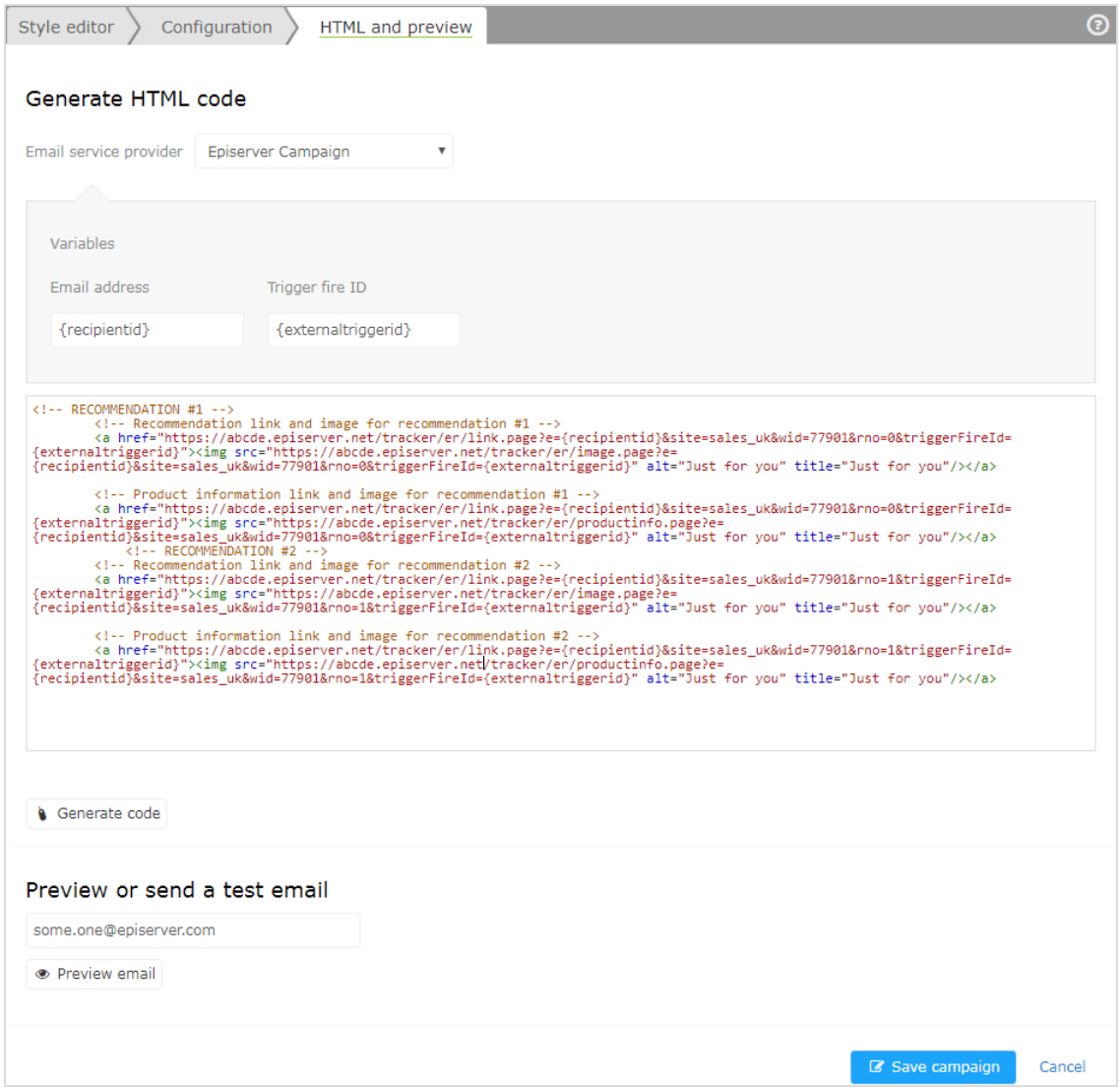

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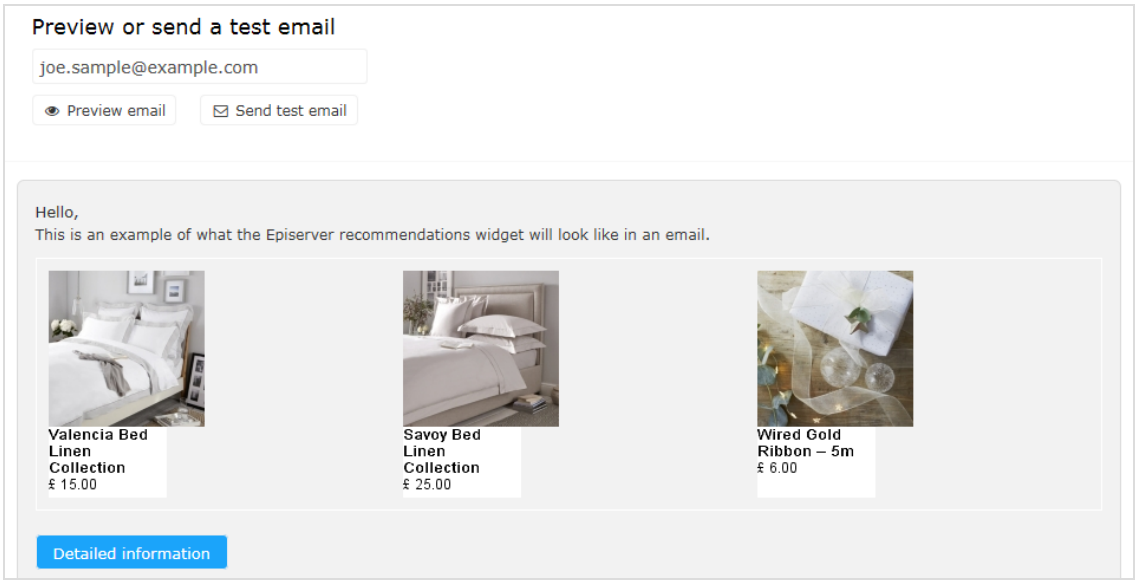

Triggered messages reports in Episerver

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

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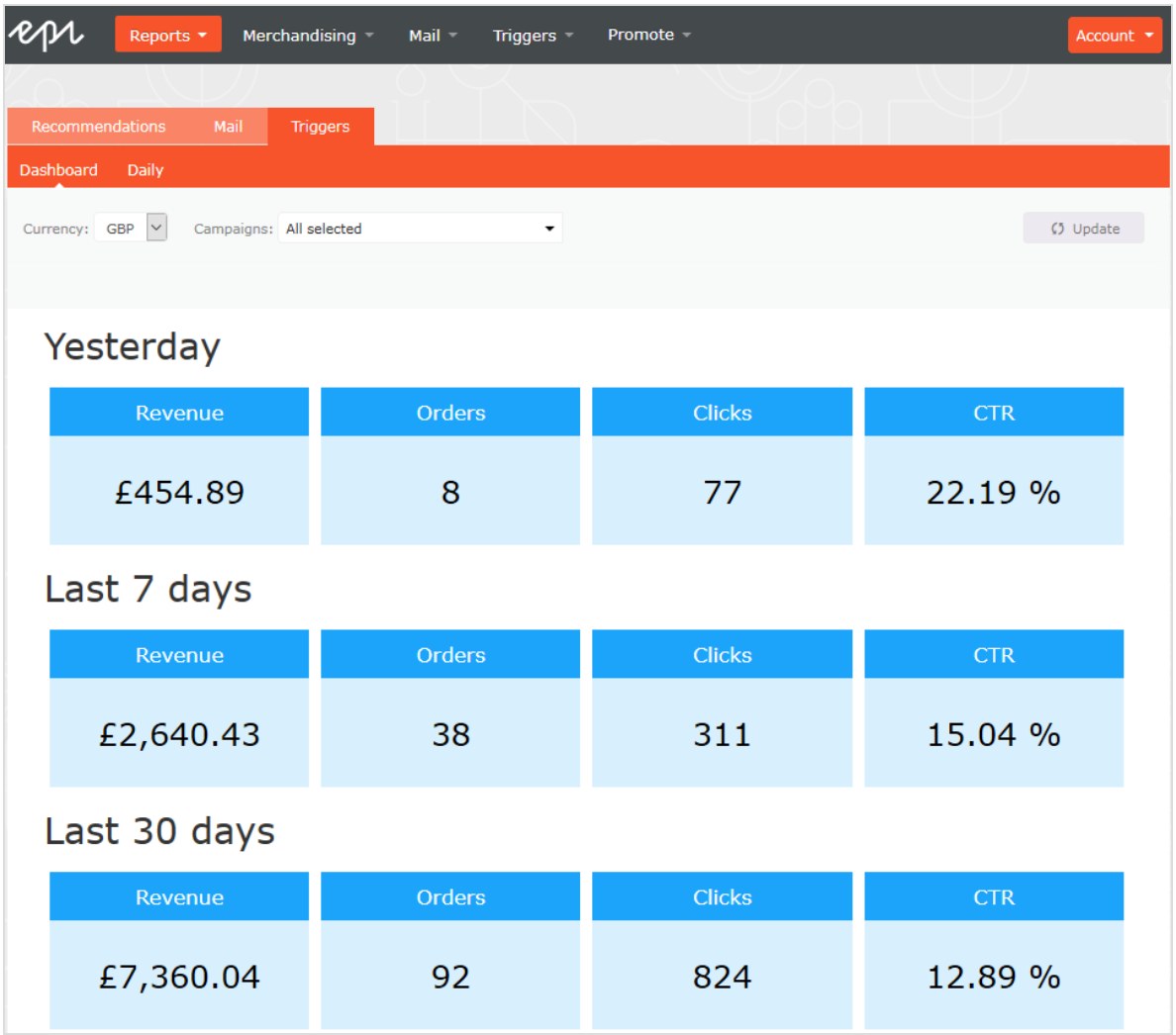

Also, there is a daily report that shows how many website sessions fired a trigger, how many triggered emails were viewed, and how many products were purchased through a Episerver-generated link from those emails. This is reported for each trigger and broken down to daily reporting.

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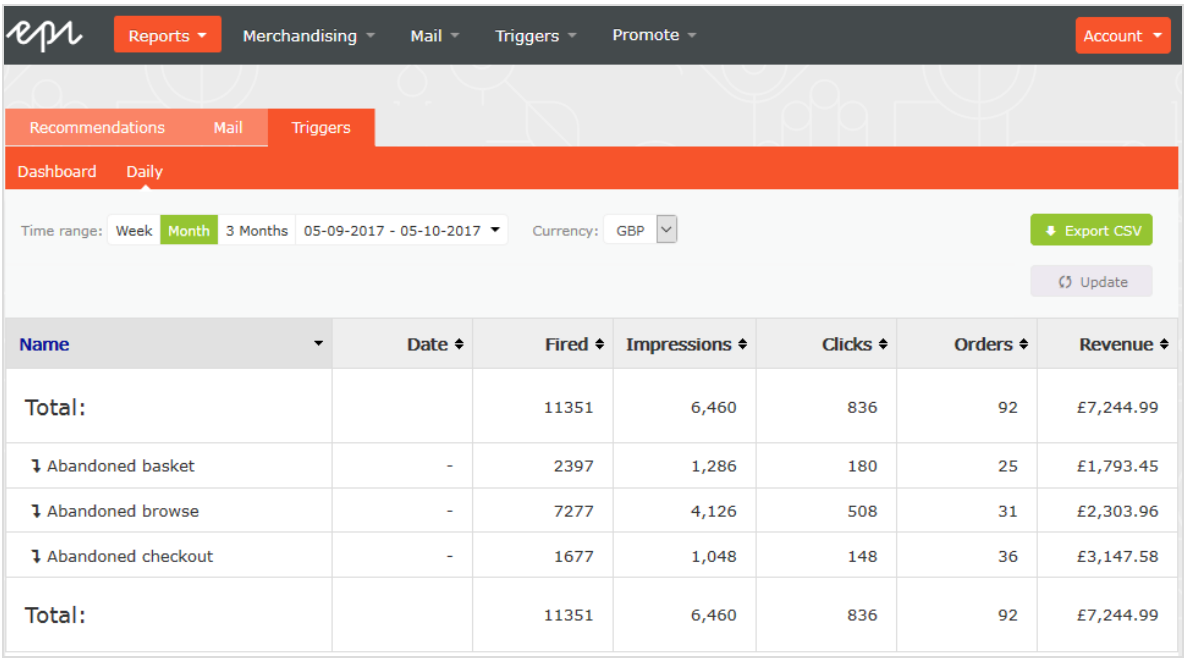

Name	Date	Fired	Impressions	Clicks	Orders	Revenue
Total:		11351	6,460	836	92	£7,244.99
Abandoned basket	-	2397	1,286	180	25	£1,793.45
Abandoned browse	-	7277	4,126	508	31	£2,303.96
Abandoned checkout	-	1677	1,048	148	36	£3,147.58
Total:		11351	6,460	836	92	£7,244.99

Using email triggers with Episerver Campaign

This topic describes how to connect Triggered Messages to Episerver Campaign.

> **Note**: To use Triggered Messages 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 Triggered Messages following the steps described here.

Sending triggered emails

You need to create a mailing campaign in Episerver Campaign, and campaigns in both Triggered Messages and Email Recommendations. In Triggered Messages, you also need to create a connection to your recipient list in Episerver Campaign and specify the appropriate action to take.

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

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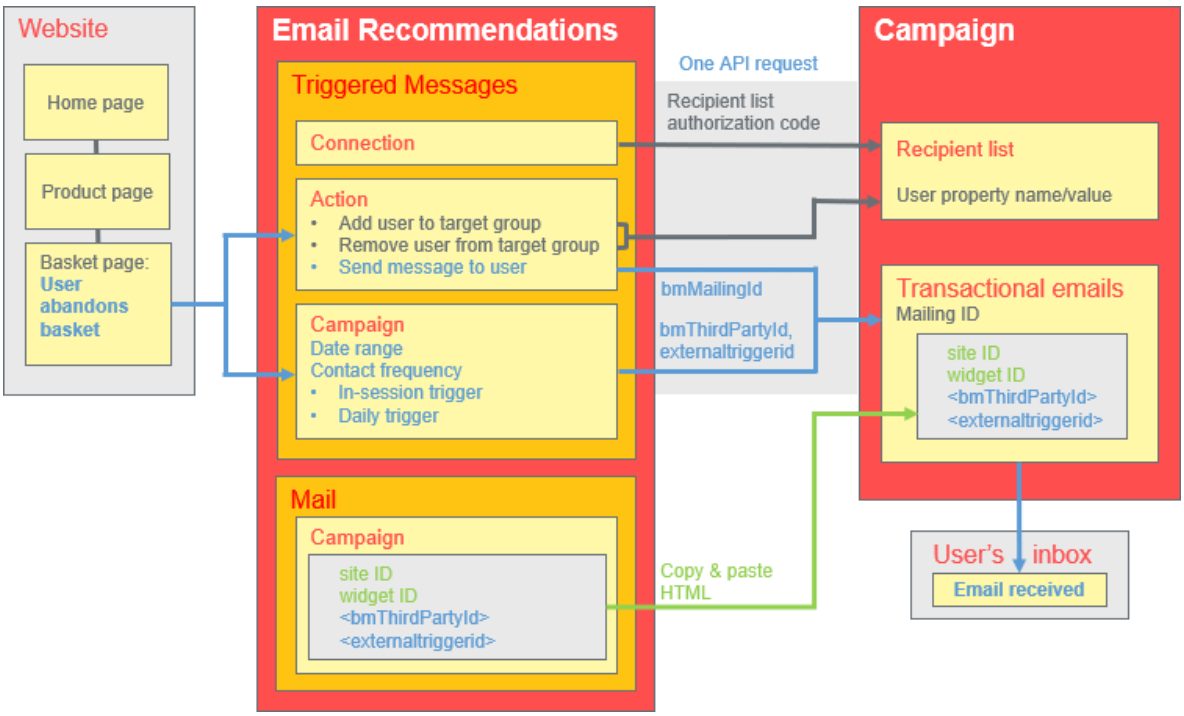

To set up the Triggered Messages-to-Campaign integration, do the following.

- **Episerver for the 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.
  - Setting up a Triggered Messages campaign with a specific strategy, such as *Abandoned basket* .

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- **Episerver Campaign portal**, set up the following:
  - **Recipient list**, which include a Recipient list authorization code.

    > Note: To receive an email from Triggered Messages, the end user must 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 Email Recommendations 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, Triggered Messages 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 for the 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 Email Recommendations template HTML code with the values sent in the API request.
  - **triggerFireId**. Replaced with the ID of the Triggered Messages 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 start menu, go to **Administration** > **API overview**.
2. Select **Recipient lists** to show its table.
3. Select your recipient list from the table.

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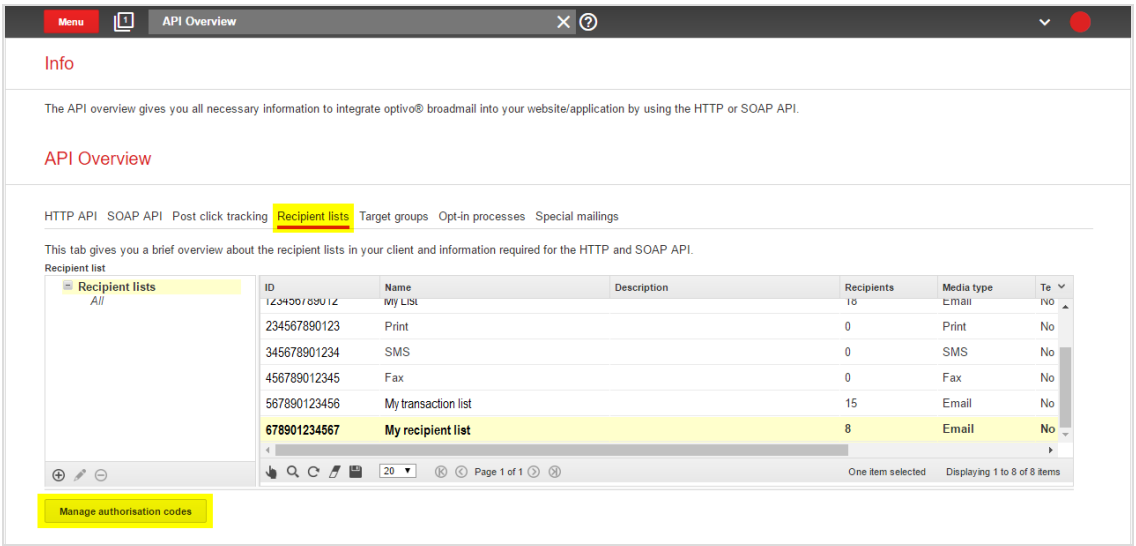
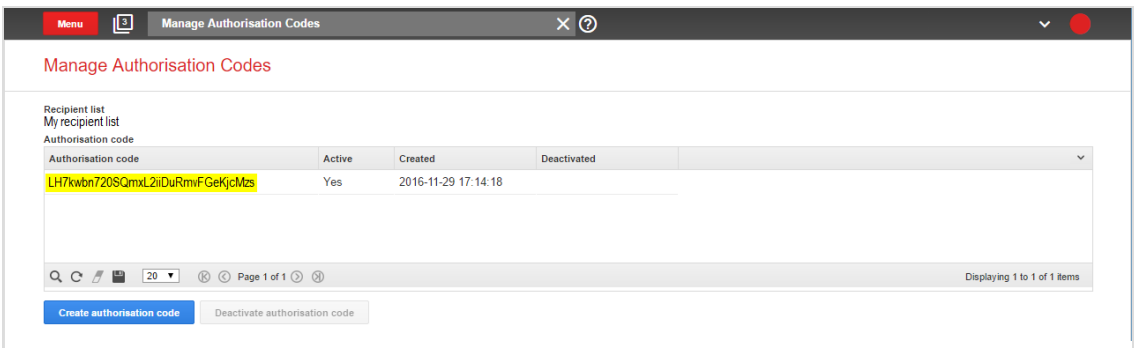
4. Click **Manage authorization codes**.



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.

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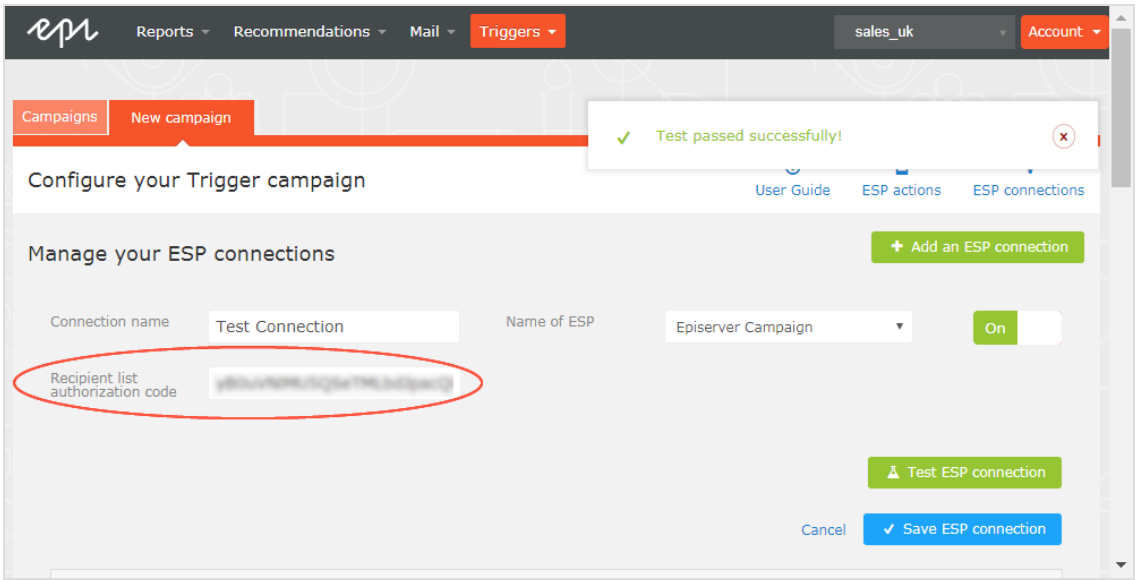

7. Enter the connection name.
8. Select **Episerver Campaign** as the name of your ESP.
9. Click **Test ESP connection**.
10. If the connection was successful, click **Save ESP connection**.

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 Triggered Messages directly to users, you need to provide the **Mailing ID** of the Episerver Campaign campaign on the Triggers ESP action page. You can retrieve the **Mailing ID** by following these steps:

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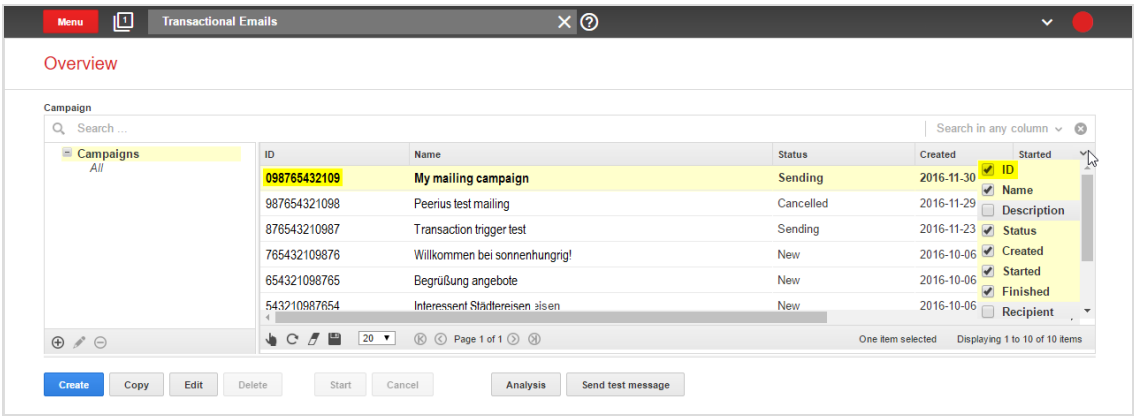
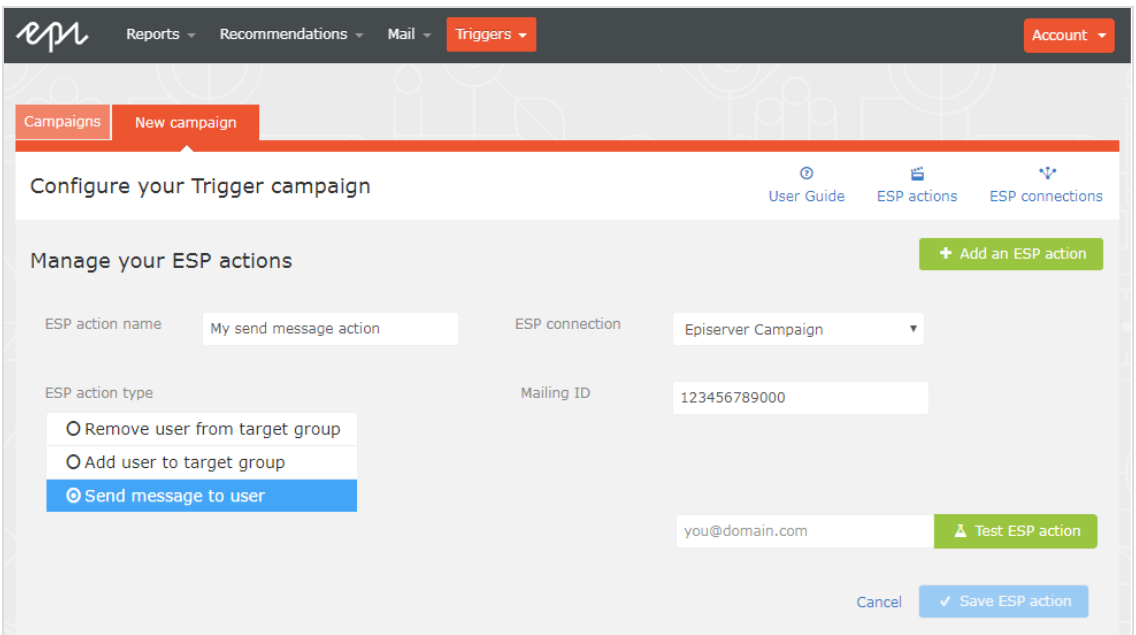
1. In Episerver Campaign from the start menu, go to **Campaigns** > **Transactionalmails**.
2. Copy the **Mailing ID** for your campaign from the ID column.



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 to user**.
   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**.

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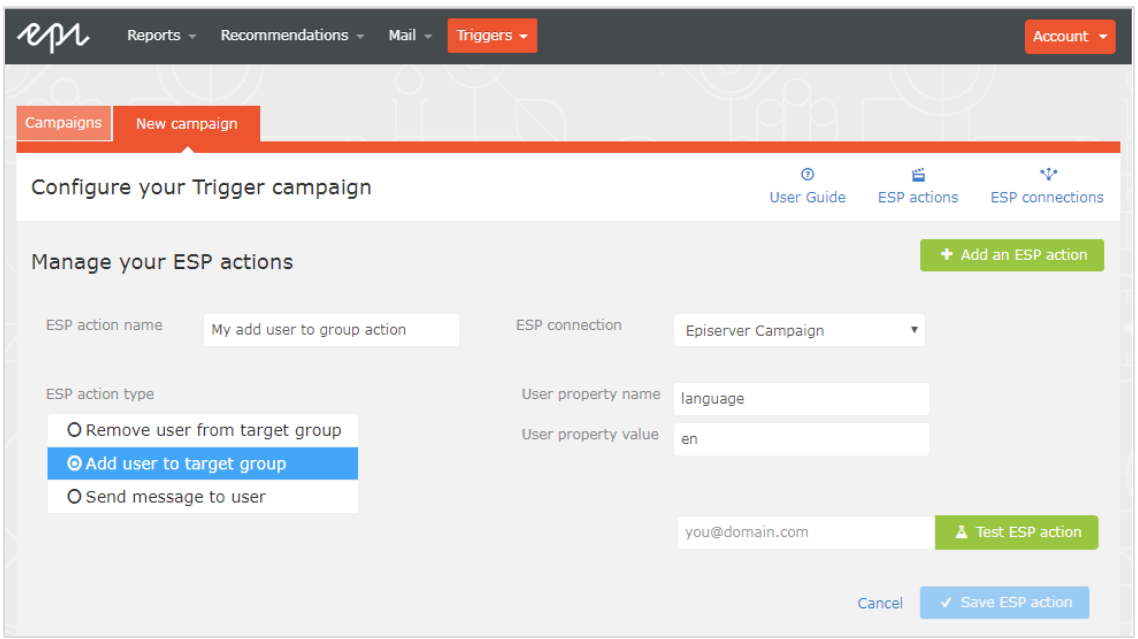
Creating an Add user to target group action

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 target group**.
   c. **ESP connection**. Select the connection that you created earlier.
   d. **User property name**. The name of the user property in your recipient list that you want Triggered Messages to update. The name you specify must match exactly the *internal name* of the field in your recipient list.
   e. **User property value**. The value of the user property given in the previous step. In this example, the User property name is *language* and the User property value is the language code of the user, (*en* in this case). 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.
   f. **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**.

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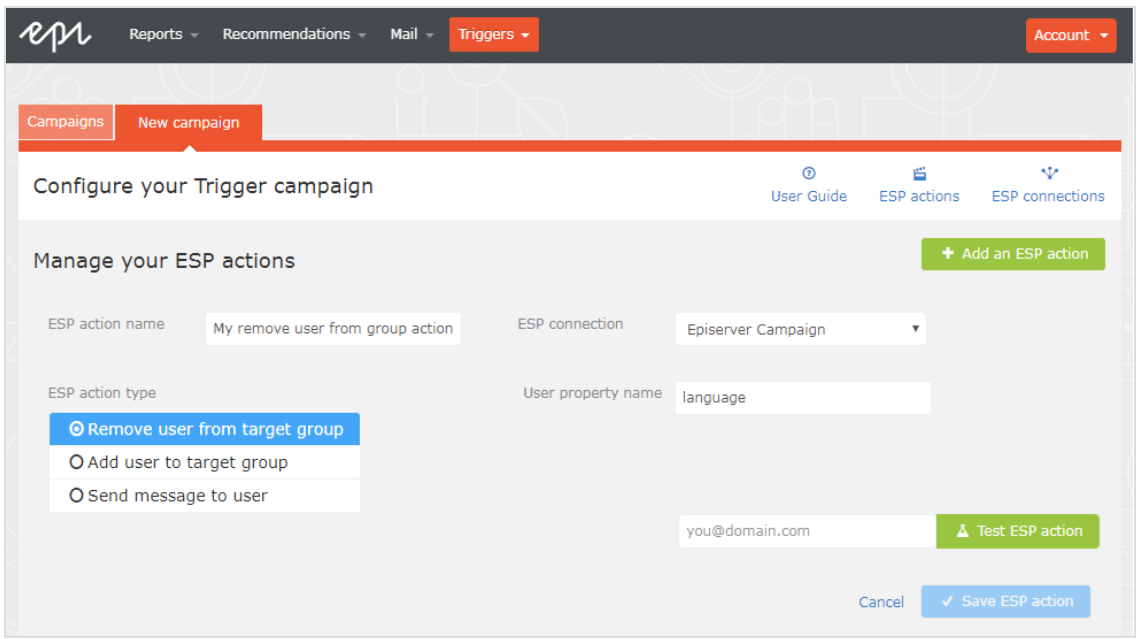
Create a Remove user from target group action

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 target group**.
   c. **ESP connection**. Select the connection that you created earlier.
   d. **User property name**. The name of the user property in your recipient list that you want Triggered Messages to update. The name you specify must match exactly the *internal name* of the field in your recipient list (*language* in this example).
   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**.

Setting up an email campaign in Episerver

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

1. In the for the Personalization Portal, go to **Mail** > **Campaigns**.
2. Select and open your Email Recommendations 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**.

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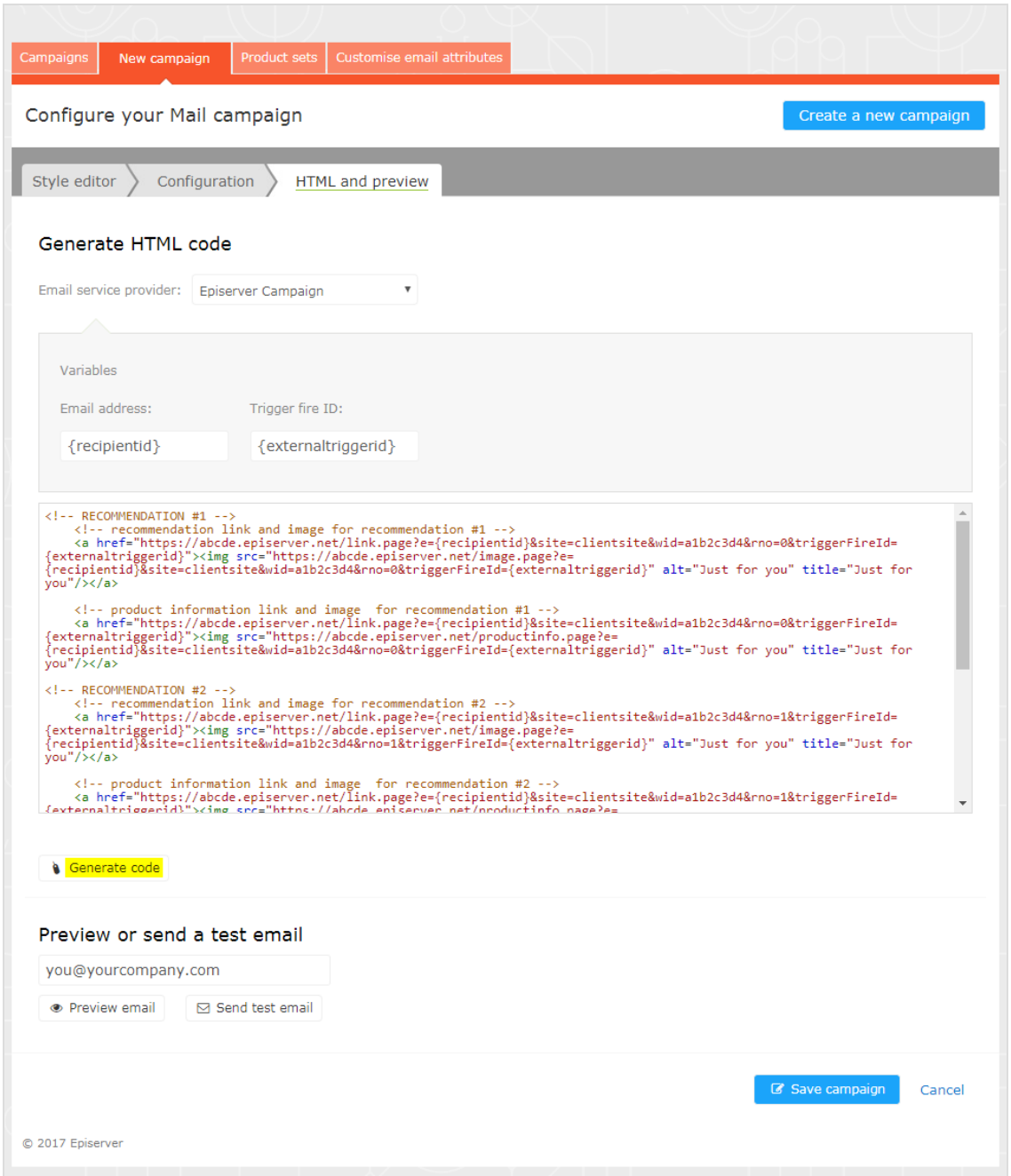
6. Click **Generate code**.
7. Copy the HTML code displayed in the window.



8. Go to Episerver Campaign.

> **Note**: To create a new mailing in Episerver Campaign, go to

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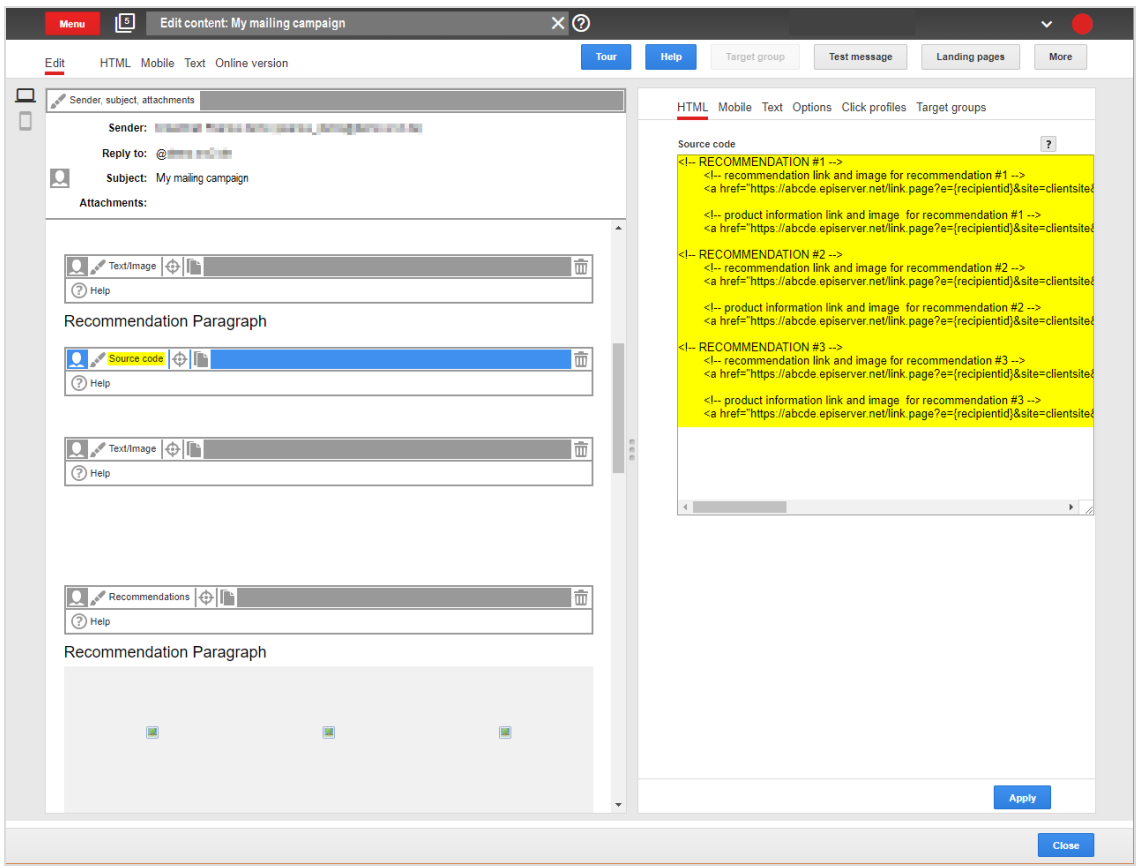
> **Campaigns** > **Transactional mails** and following the instructions in Transactional mails in the Episerver User Guide.

9. From the Episerver Campaign start 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**.

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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.

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