



Triggered Campaigns

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Triggered Campaigns

CharityeMail enables you to set up powerful triggered email campaigns to generate leads and conversions – automatically. Triggered campaigns can be based on a variety of variables, from customers' birthdays, to their buying patterns and expressed preferences, from seasons and holiday dates to life cycle milestones. You also have the ability to create a series of triggered campaigns such as renewal programmes, prospect warming, free trial conversions etc.

In the examples that follow, we will demonstrate two different ways that triggers can be used. The first example involves setting a trigger to wish customers a Happy Birthday. This trigger will be set to fire a couple of days before the recipient's birthday.

The second example is based on a customer's service contract coming up for renewal. In this case, we're going to set up triggers to fire 30 days before the renewal date, then 10 days before the renewal date and finally a trigger if the contract has expired.

Before creating your triggers there are a couple of steps you must complete first.

4 simple steps to creating a triggered email campaign

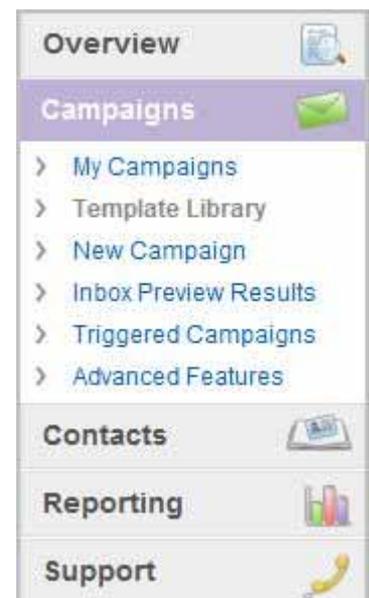
- 1 Create your email in My Campaigns using the WISYWIG editor
- 2 Use the 'edit settings' option to set your campaign to 'Triggered'
- 3 Ensure you have the Date field in your contacts address book that will fire your trigger
- 4 Go to Triggered Campaigns in the campaigns menu and add a new trigger, set the rules and enable it.

Steps 1 and 2. Setting a Campaign as Triggered

The first step is to ensure the campaign you wish to send as a triggered email has been set as a **Triggered** campaign. You can do this when you are first creating the campaign or you can use the **"Edit Settings"** option if your campaign has already been created.

When creating a campaign, select the **Campaigns** option from the left-hand navigation pane and then select **Template Library** from the sub-menu that appears.

Select the template you are going to use for this campaign and click **NEXT STEP**.

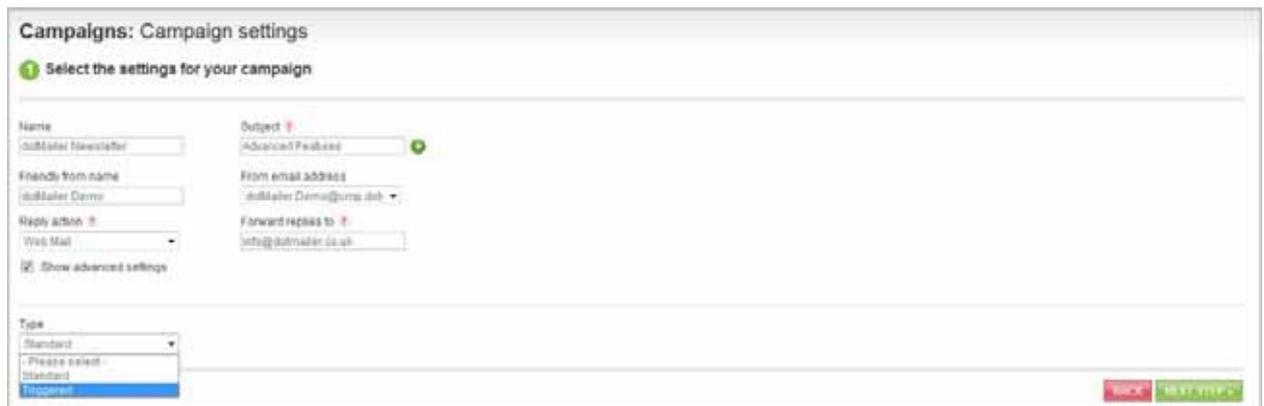


On the Campaign Settings screen, check the “**Show advanced settings**” option as shown below.

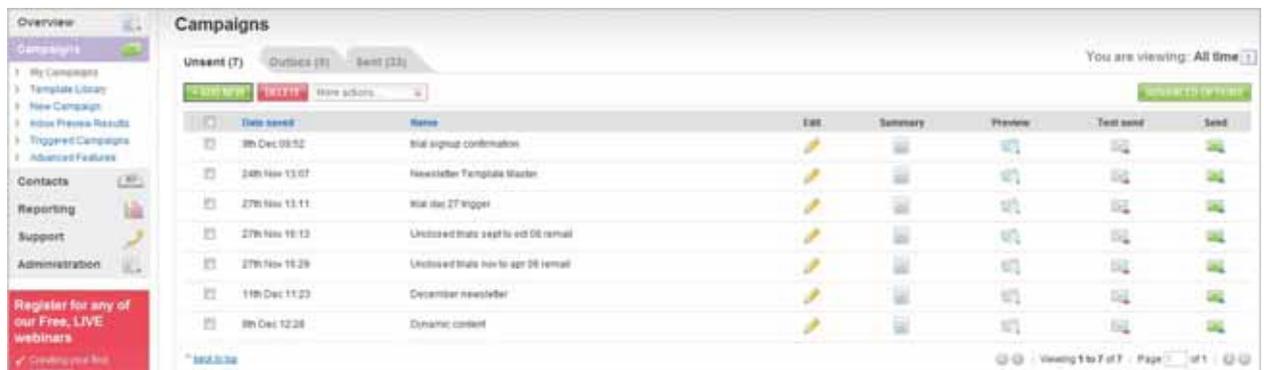


The campaign type is set as **Standard** by default.

Using the drop-down, select **Triggered** from the list displayed and then click **Next Step** to continue. Save your campaign in the normal way.



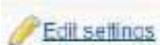
Alternatively if your campaign has already been created, select **Campaigns** from the left-hand navigation pane. Your existing campaigns are displayed in the list under the **Unsent** tab.



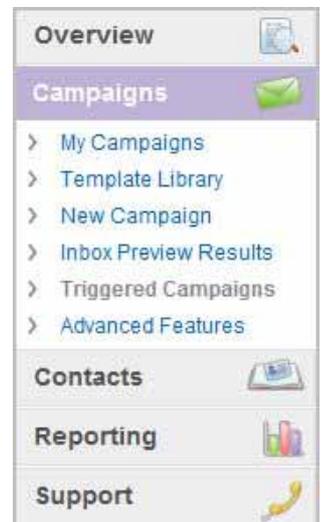
Date saved	Name	Edit	Summary	Preview	Test send	Send
30 Dec 08:52	Trial signup confirmation					
24th Nov 13:07	Newsletter Template Master					
27th Nov 13:11	Mail the 27 trigger					
27th Nov 10:13	Unprocessed trials sept to oct 06 email					
27th Nov 10:29	Unprocessed trials nov to apr 06 email					
11th Dec 11:23	December newsletter					
30 Dec 12:28	Dynamic content					

Alongside the campaign you wish to set as triggered, click on the summary icon  .



You can now edit your campaign settings by clicking on the  [Edit settings](#) link. This will open the **Campaign settings** screen. Check the **Show Advanced settings** option and select **Triggered** from the drop-down menu as described above.

Your campaign type is now set. It is important to note that campaigns set as triggered will **not** be displayed in your list of campaigns under the **My Campaigns** option. Instead, all campaigns set as Triggered are displayed under the **Triggered Campaigns** menu option under the Content tab.



Step 3. Creating the contact data fields

The next step prior to creating your triggers, is to ensure that the data fields that are going to be used for the triggers exist in your address books. Only data fields with a data type of **Date** can be used to create triggers under the Triggered Campaigns option.

In the examples we discussed earlier, we mentioned our first trigger being based on a customer's birthday and our second set of triggers being based on a service renewal date. So, these two fields must exist in our address books or be created.

To create new data fields, select the option **Contacts** from the left-hand navigation pane and then select **Contact Data Fields** from the sub-menu that appears. A list of all the data fields that exist in your address books

will be displayed. Click the  button and the **Create new field** window will appear.



Create new field ✕

To set up your data field, please select a unique name, the data type, and the access type.

Name:

Data Type ?

Default value:

Access ? This data label is public This data label is private

Enter the name of the field and select the “Date” data type from the drop-down list. Click on



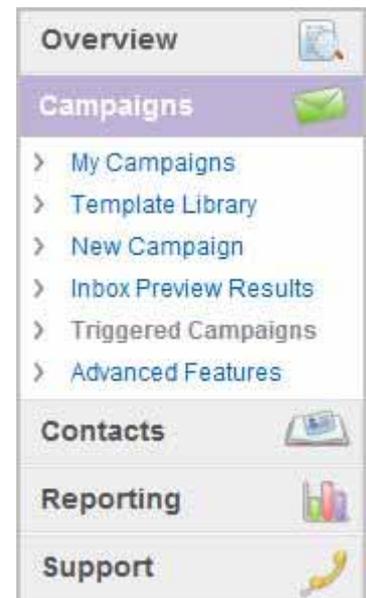
. Repeat this process to create any further data fields required.

You can now import the data you need to fire this trigger, by mapping the Birthday field in the data you import to the newly created Birthday data contact field within CharityeMail (see Advanced Features Guide for more info on importing and mapping data).

Step 4. Creating Triggers

To create your email triggers and access existing ones, select the “Campaigns” option from the left-hand navigation pane. From the sub-menu displayed, select “Triggered Campaigns”.

The **Campaigns. Triggered campaigns** screen is displayed and consists of two tabs.



The **Campaign content** tab details campaigns that you have already set as triggered. In our example below, we have one campaign which is used to wish our customers a Happy Birthday and also three campaigns which are sent out at different intervals to advise our customers that their service with us is due for renewal.



	Date saved	Date sent	Name	Edit	Secondary	Preview	Test send	Send
<input type="checkbox"/>	11th Dec 13:58	Never	Service Renewals 30 Days					
<input type="checkbox"/>	11th Dec 13:58	Never	Service Renewals 10 Days					
<input type="checkbox"/>	8th Dec 13:29	Never	Service Renewals Expires					
<input type="checkbox"/>	8th Dec 13:24	Never	Happy Birthday					

Viewing 1 to 4 of 4 : Page 1 of 1

Creating a one-off trigger

To create a triggered send, move back to the **Triggered sends** tab and click on the **ADD NEW** button. The **Editing trigger group** screen is displayed.

ADD NEW

Campaigns: Editing trigger group

Run name

Trigger starts on 

Trigger ends on  Never ends

Please note: If you are amending a trigger that is due to run today, it will be reset and won't re-run until tomorrow.

Create new

- Name for this trigger
- Select the data field for triggering
- Select when the trigger will fire days each contacts
(please select a data field)
- Trigger recurrence Occurs once Occurs every year
- Which triggered campaign do you want to send?
- When the trigger fires, what time of day should it send? :
- Select settings Enabled

[Back](#) **Save changes**

In the top part of the screen, enter a name for this particular trigger group and using the pop-up calendar, select a start date and an end date. If the trigger doesn't have an end date, click the **Never ends** checkbox.

Run name

Trigger starts on 

Trigger ends on  Never ends

Please note: If you are amending a trigger that is due to run today, it will be reset and won't re-run until tomorrow.

The bottom part of the screen is where you enter the trigger details.

Create new

- Name for this trigger
- Select the data field for triggering
- Select when the trigger will fire days each contacts
(please select a data field)
- Trigger recurrence Occurs once Occurs every year
- Which triggered campaign do you want to send?
- When the trigger fires, what time of day should it send? :
- Select settings Enabled

[Back](#) **Save changes**

- 1 Enter a name for the trigger. As this is a one-off trigger, this may well be the same name as the trigger group.
- 2 Select the data field you want to use to fire the trigger from the drop-down. Only **“Date”** fields in your address books will be displayed. If no fields are displayed in the dropdown list, it means you have no **“Date”** fields created in your address books (see Step 2).
- 3 Select the number of days (from the first drop-down) that the trigger will fire before or after (from the second drop-down) the date field you selected. In our example, the trigger is set to fire 2 days before the contact’s birthday.
- 4 Specify if the trigger is to reoccur. If you select **“Occurs once”**, this trigger will only fire on the exact year that is stored in the contact data field. This would be useful for an order date, for example. If you select **“Occurs every year”**, this trigger will fire every year. This is ideal for an anniversary type of data field, such as birthday.
- 5 Select the campaign that is to be sent to the contact. The drop-down will list all campaigns that you have set with a type of **“Triggered”**. If you have no campaigns displayed in the list, it means that you have not set your campaign type as triggered (see Steps 1 and 2).
- 6 Specify the time of day you wish the trigger to be actioned. This is based on a 24 hour clock, UK time.
- 7 Finally you need to enable the trigger. Click the checkbox **“Enabled”**.

When you have completed all the information required, click on the button

SAVE CHANGES

Your trigger is now set-up. The trigger will run automatically based on the conditions you have entered.

Creating a series of triggers

Our previous example demonstrated how to set up a single trigger. You may also wish to set up a series of triggers, for example, if you provide a service that is due for renewal. Select the

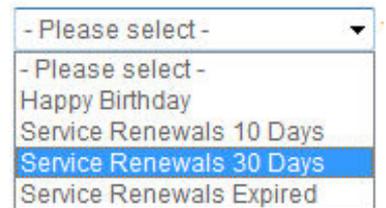


button from the **Triggered Sends** tab as before. In the top part of the screen enter the name of this trigger group, the start date and the end date (or check Never ends).



Now we need to complete the first trigger for this group. Our first trigger is going to be fired 30 days before the contact data field **“Service-Renewal-Date”**. This trigger will only fire once, on the exact year stored.

Against step **5** we have a list of triggered campaigns for each stage of our trigger group. In this instance, we select the campaign called **“Service Renewals 30 days”**. (Remember, if no campaigns are displayed in your list, it means the campaign has not been set as triggered).



Finally, we set the time of day we want the trigger to fire and click the **“Enabled”** checkbox.

This first trigger will advise the contact that their service expires in 30 days and detail the list of renewal options they have available. It may include discounts if they renew early.

Click on the **SAVE CHANGES** button to save this trigger.

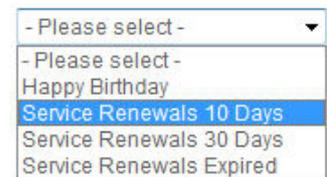
We can now set up our next trigger. Having saved the changes to our first trigger, the screen will refresh and the information relating to our first trigger is displayed on the first tab.



Click on the “**Create new**” tab to create your next trigger.



Our second trigger is going to be fired 10 days before the contact data field “**Service-Renewal-Date**”. This trigger will only fire once, on the exact year stored. In this instance, we select the campaign called “Service Renewals 10 days” from our list of triggered campaigns.



Finally, we set the time of day we want the trigger to fire and click the “**Enabled**” checkbox. This second trigger will advise the contact that their service expires in 10 days and detail the list of renewal options they have available. It may include final discounts if they renew straight away. Click on the

SAVE CHANGES

button to save this trigger.

Both triggers are now displayed on separate tabs.



Click on the “**Create new**” tab to create the final trigger.

Our final trigger is going to be fired 1 day after the contact data field “**Service-Renewal-Date**”. We have selected the campaign called “**Service Renewals Expired**” from our list of triggered campaigns.

This final trigger will advise the contact that their service has expired and detail the revised costs they will now incur if they require assistance. Click on the **SAVE CHANGES** button to save this trigger.

We have now finished creating our triggers.

If you wish to remove a trigger, click on the appropriate tab and use the **DELETE THIS TRIGGER** button.

To view all your triggered groups, select “**Triggered Campaigns**” from the left hand navigation pane.

Last modified	Name	Edit
8th Dec 14 15	Happy Birthday	
8th Dec 15 05	Service Renewals	

A list of triggers is displayed on the “**Triggered sends**” tab. To edit a trigger group, click on the  button.

Please note that if you are amending a trigger that is due to run today, it will be reset and will not re-run until tomorrow.

Triggered campaigns and segmentation queries

When you create a date driven triggered campaign as described in this guide, CharityeMail will automatically create a segmentation query based on the rules of your trigger. These are named 'Triggered Books' by CharityeMail.

If you choose, you can apply further segmentation rules to those queries, for example: if you don't want to send a happy Birthday message to contacts who are over 30; or if you don't want to send a renewal reminder to contacts who pay by Direct Debit. Please see the CharityeMail Advanced Features Guide for more information on editing Segmentation Queries.

Reporting

Triggered campaigns are accessible in your reporting area in the same way as a standard campaign. To access your reports, select **Reporting** from the left-hand navigation pane.

A list of campaigns sent will be displayed including any that have been sent as a result of a trigger.

Open the report by clicking on the name.



At the top of the screen you will see details of the **Campaign Name** and the **Subject** line used. The **Address books** are displayed as "N/A" as no address books are used for this campaign, it is sent as a result of a trigger. You can also see that the **Campaign type** is set as **Triggered**.

Reporting: Campaign Overview



Campaign name	trial signup confirmation with seminar banner
Subject	confirmation of your dotMailer trial account
Address books	N/A
Date sent	11th Dec 13:36
Campaign type	Triggered

The reports for triggered campaigns are continually updated as triggers are sent, in other words the results are ongoing.