



Episerver Triggered Messages

User Guide





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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.

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.

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.

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).

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there are tabs for 'Campaigns' and 'Configuration'. The current campaign is 'Targeted discounts campa'. The interface is divided into several sections:

- Header:** 'Configure your Trigger campaign' with a dropdown menu showing 'Targeted discounts campa'. On the right, there are links for 'ESP actions' and 'ESP connections'.
- Basic Info:** 'Campaign name: Targeted discounts campaign', 'ESP action: My add to group ac', 'Start date: 04/11/2017', and 'End date:'.
- Contact frequency:** A toggle set to 'On' and three frequency options: '1 per day', '5 per week', and '8 per month'.
- Timing:** 'How many minutes to wait: 30'.
- In-session triggers:** A list of triggers with checkboxes: 'Abandoned checkout', 'Abandoned basket' (checked), and 'Abandoned browse'.
- Daily triggers:** A list of triggers with checkboxes and associated fields: 'Targeted discounts (last 30 days)', 'High product interest (last 30 days)' (with 'Viewings' field), 'Post purchase' (with 'Days since order' field), and 'Low-in-stock abandoned-basket' (with 'Stock upper threshold' and 'Stock lower threshold' fields).
- Additional trigger actions:** A list of actions with checkboxes and 'Viewings' fields: 'Home page', 'Category page' (checked, Viewings: 1), 'Product page', 'Basket page', 'Order page', 'Specific page' (checked, Viewings: 1), and a 'Specific page' with a text input field containing 'promo123' and a label 'Enter the URL or a partial URL'.
- Footer:** 'Save campaign' and 'Cancel' buttons.

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

The screenshot shows the 'Configure your Trigger campaign' interface in the Episerver Personalization Portal. The top navigation bar includes 'Reports', 'Merchandising', 'Mail', 'Triggers', and 'Promote'. The 'Triggers' menu is active. Below the navigation, there are tabs for 'Campaigns' and 'New campaign'. A notification banner says 'Set up a connection to your...'. The main content area is titled 'Configure your Trigger campaign'. It features several input fields and sections:

- Campaign name:** A text input field with a help icon.
- ESP action:** A dropdown menu currently set to 'Please select'. A red note below it says 'Please provide an ESP Action for this Trigger.'
- Start date:** A date picker set to '02/10/2017'.
- End date:** A date picker.
- Contact frequency:** A toggle switch currently set to 'Off'.
- How many minutes to wait:** A text input field.
- In-session triggers:** A list of checkboxes for 'Abandoned checkout', 'Abandoned basket', and 'Abandoned browse'.
- Daily triggers:** A list of checkboxes for 'Targeted discounts (last 30 days)', 'High product interest (last 30 days)' (with a 'Viewings' input), 'Post purchase' (with a 'Days since order' input), and 'Low-in-stock abandoned-basket' (with 'Stock upper threshold' and 'Stock lower threshold' inputs).
- Additional trigger actions:** A list of checkboxes for 'Home page', 'Category page', 'Product page', 'Basket page', 'Order page', and 'Specific page', each with a 'Viewings' input. Below this is a text input field for 'Enter the URL or a partial URL'.

At the top right, there are two links: 'ESP actions' and 'ESP connections', with the latter circled in red. At the bottom right, there are two buttons: 'Save campaign' (with a checkmark) and 'Cancel'. The footer shows '© 2017 Episerver'.

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

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there are tabs for 'Campaigns' and 'New campaign'. Below this, the main heading is 'Configure your Trigger campaign'. On the right side, there are links for 'ESP actions' and 'ESP connections'. The primary section is 'Manage your ESP connections', which includes a '+ Add an ESP connection' button. The form contains the following fields:

- Connection name: My ESP connection
- Name of ESP: My ESP (with a dropdown arrow)
- ESP username: John.Doe@example.com
- ESP realm: http://My-ESP-realm.com
- ESP password: A masked password field with a toggle for visibility.

 At the bottom right, there are buttons for 'Test ESP connection', 'Save ESP connection', and 'Cancel'.

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

Setting up an ESP action

1. To set up the action, go to **Triggers** in your for the Personalization Portal account and open a new or existing campaign.
2. Click **ESP actions**. You can either edit an existing ESP action or create a new one. Make sure it uses the connection that you require, for example, the one you created or edited in [Setting up an ESP connection](#).

This screenshot shows the 'Manage your ESP actions' section of the campaign configuration page. A notification banner at the top right reads 'Set up the action for your ESP to perform.'. The 'ESP actions' link in the top right corner is circled in red. Below the heading, there is a '+ Add an ESP action' button. At the bottom, a table header is visible with columns for 'ESP action name', 'ESP connection name', 'ESP action type', and 'Edit - Delete'.

3. To create a new action, click **Add an ESP action**.
4. Choose your preferred **ESP action type** from the available options and enter the required details (such as **Group ID**, **List ID**, **Message ID**, **Database**); the values of which

are available from your ESP portal.

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

The screenshot shows a web interface for configuring a triggered campaign. At the top, there are tabs for 'Campaigns' and 'New campaign'. Below this is a header 'Configure your Trigger campaign' with links for 'ESP actions' and 'ESP connections'. The main section is titled 'Manage your ESP actions' and includes a '+ Add an ESP action' button. The form contains several fields: 'ESP action name' with the value 'My add to group action', 'ESP connection' with a dropdown menu showing 'My ESP Connection', 'ESP action type' with three radio button options: 'Add user to group' (selected), 'Remove user from group', and 'Send message', 'Group ID' with the value 'My group ID', and an email address field with 'you@domain.com'. At the bottom right, there are buttons for 'Cancel', 'Test ESP action', and 'Save ESP action'.

Available action types are as follows:

Note: Depending on the features supported by your ESP platform, some of these actions may not be available for your chosen connection.

- **Add user to group.** A fired trigger tells the ESP to add a user's email address to the email group or list with the specified **Group ID** or **List ID**. If there are ESP-level triggers on the list, these may be activated by this step. This action just adds a user's email addresses to a list; it does not send those users any emails.
- **Remove user from group.** Removes a user's email address from the group or list.
- **Send message.** A fired trigger tells the ESP to send the message with the specified **Message ID** to the user.

Warning: Depending on your ESP, **Send message** may not check whether the user has opted in to the emailing scheme, so should be used with caution.

5. After you created your ESP action, test it and save it.

Linking to a specific basket

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

For developer information, see [Link to a specific basket](#) on Episerver World.

Managing 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.

Configure your Trigger campaign Create a new campaign

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

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Targeted discounts campaign	My add to group action	30 minutes	in session	1 per day 5 per week 8 per month	
2	Abandoned checkout	Send message action	30 minutes	in session	Off	
3	Abandoned basket	My add to group action	45 minutes	in session	1 per day 3 per week 8 per month	
4	Abandoned browse	Remove user	80 minutes	in session	2 per day 10 per week 35 per month	

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.

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

Note: An individual campaign's **Contact frequency** could stop triggers from being fired for that campaign if its limit is reached first.

Edit – Status – Delete


- **Edit.** Click **Edit**  or on a 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.

Campaigns **New campaign**

Configure your Trigger campaign Create a new campaign

Global contact frequency: On Off

per day
 per week
 per month

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Targeted discounts campaign	My add to group action	30 minutes	in session	1 per day 5 per week 8 per month	
2	Abandoned checkout	Send message action	30 minutes	in session	Off	
3	Abandoned basket	My add to group action	45 minutes	in session	1 per day 3 per week 8 per month	
4	Abandoned browse	Remove user	80 minutes	in session	1 per day 10 per week 35 per month	

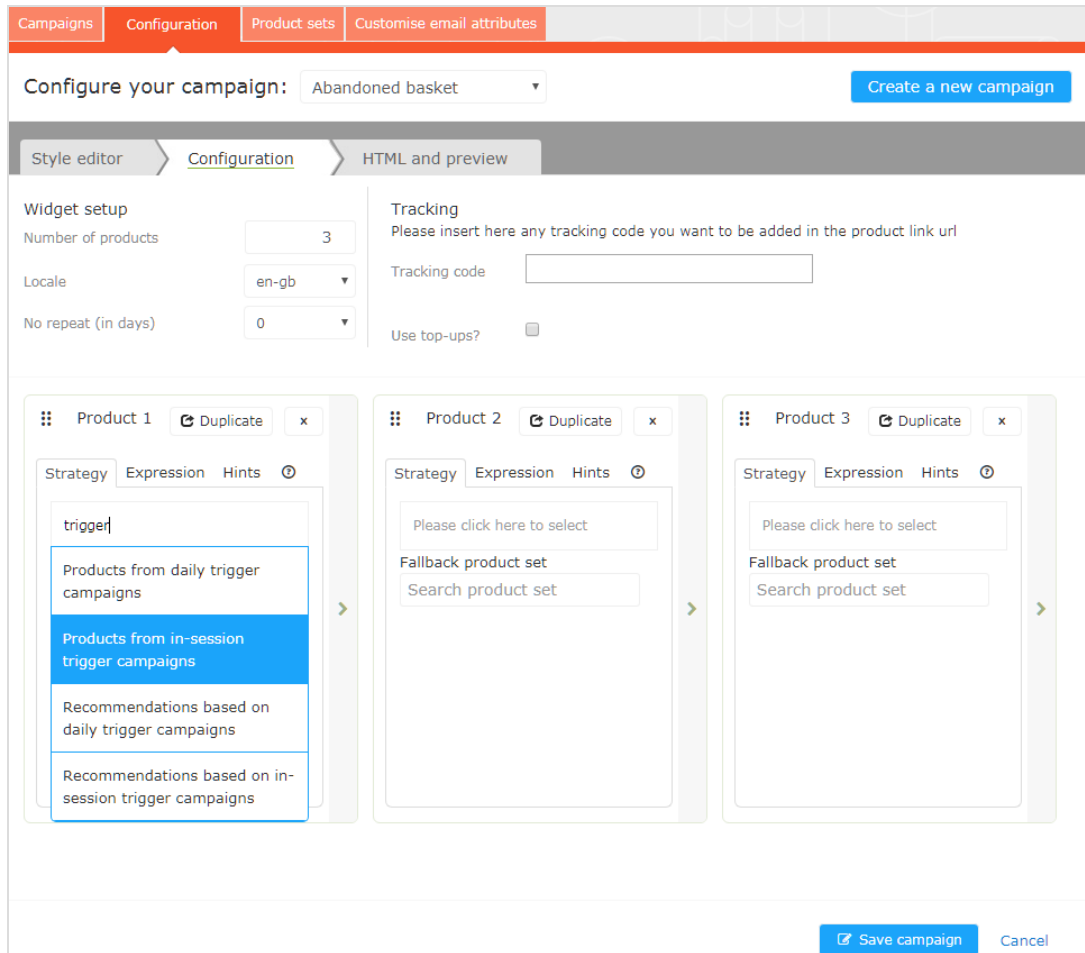
Setting up a triggered Email Recommendations campaign

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.
 - **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 placeholders are automatically populated in the variables fields. Click **Generate code**. You must insert the generated HTML code into the email template in your ESP account.

Style editor Configuration **HTML and preview**

Generate HTML code

Email service provider

Variables

Email address	Trigger fire ID
<input style="width: 100px;" type="text" value="{recipientid}"/>	<input style="width: 100px;" type="text" value="{externaltriggerid}"/>

```
<!-- RECOMMENDATION #1 -->
<!-- Recommendation link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/tracker/er/link.page?e={recipientid}&site=sales_uk&wid=77901&rno=0&triggerFireId={externaltriggerid}"></a>

<!-- Product information link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/tracker/er/link.page?e={recipientid}&site=sales_uk&wid=77901&rno=0&triggerFireId={externaltriggerid}"></a>

<!-- Recommendation #2 -->
<!-- Recommendation link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/tracker/er/link.page?e={recipientid}&site=sales_uk&wid=77901&rno=1&triggerFireId={externaltriggerid}"></a>


<!-- Product information link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/tracker/er/link.page?e={recipientid}&site=sales_uk&wid=77901&rno=1&triggerFireId={externaltriggerid}"></a>
```

Preview or send a test email


Preview or send a test email

[Preview email](#) [Send test email](#)

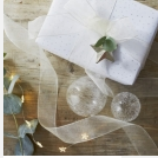
Hello,
This is an example of what the Episerver recommendations widget will look like in an email.



Valencia Bed Linen Collection
£ 15.00



Savoy Bed Linen Collection
£ 25.00

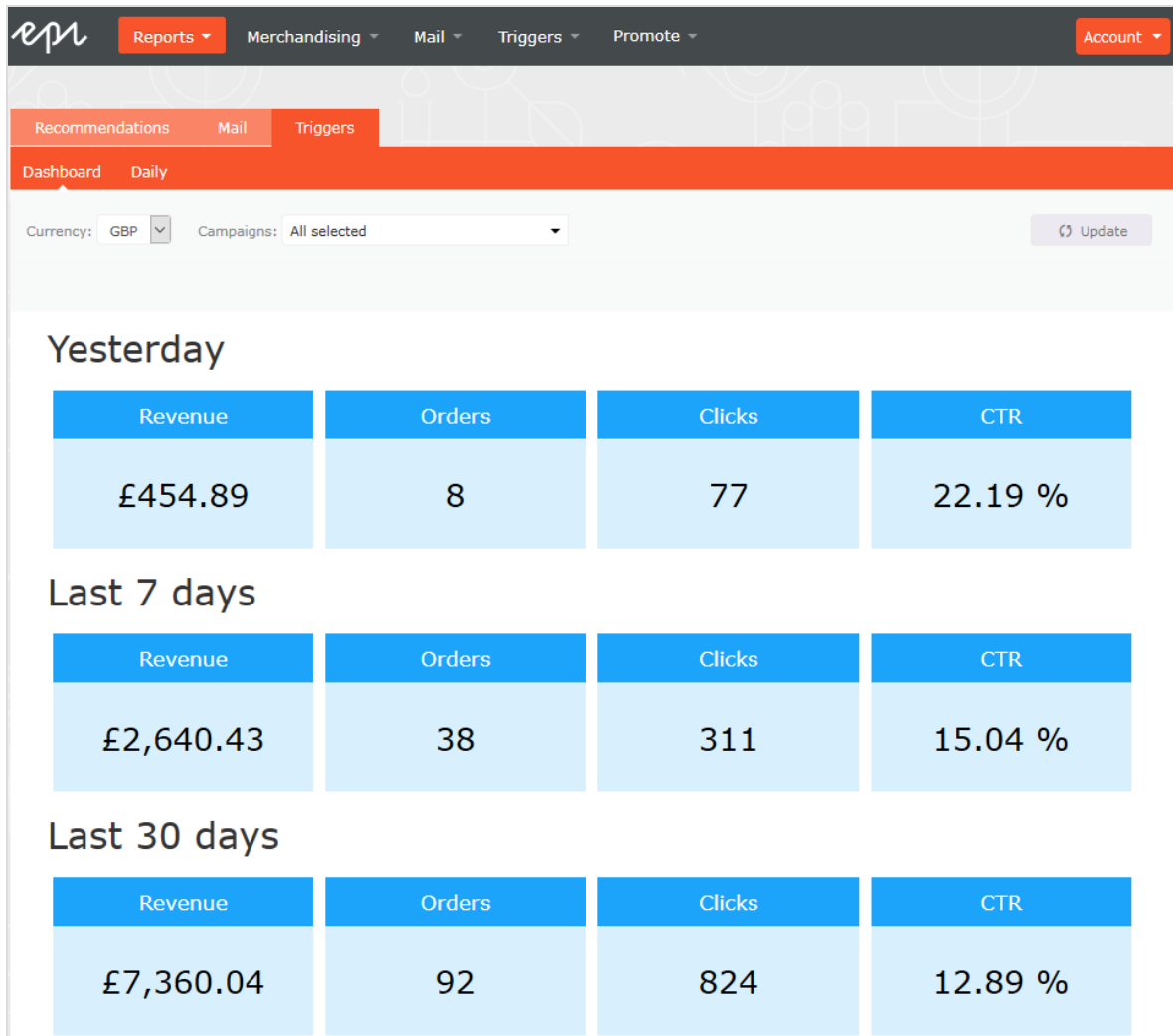


Wired Gold Ribbon - 5m
£ 6.00

[Detailed information](#)

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.



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

The screenshot displays the Episerver dashboard for triggered email recommendations. The interface includes a navigation bar with 'Reports', 'Merchandising', 'Mail', 'Triggers', and 'Promote' menus, and an 'Account' button. Below the navigation, there are tabs for 'Recommendations', 'Mail', and 'Triggers', with 'Triggers' selected. Underneath, there are sub-tabs for 'Dashboard' and 'Daily', with 'Daily' selected. The dashboard shows a time range of 'Month' (05-09-2017 - 05-10-2017) and a currency of 'GBP'. There are buttons for 'Export CSV' and 'Update'. The main data is presented in a table with the following structure:

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

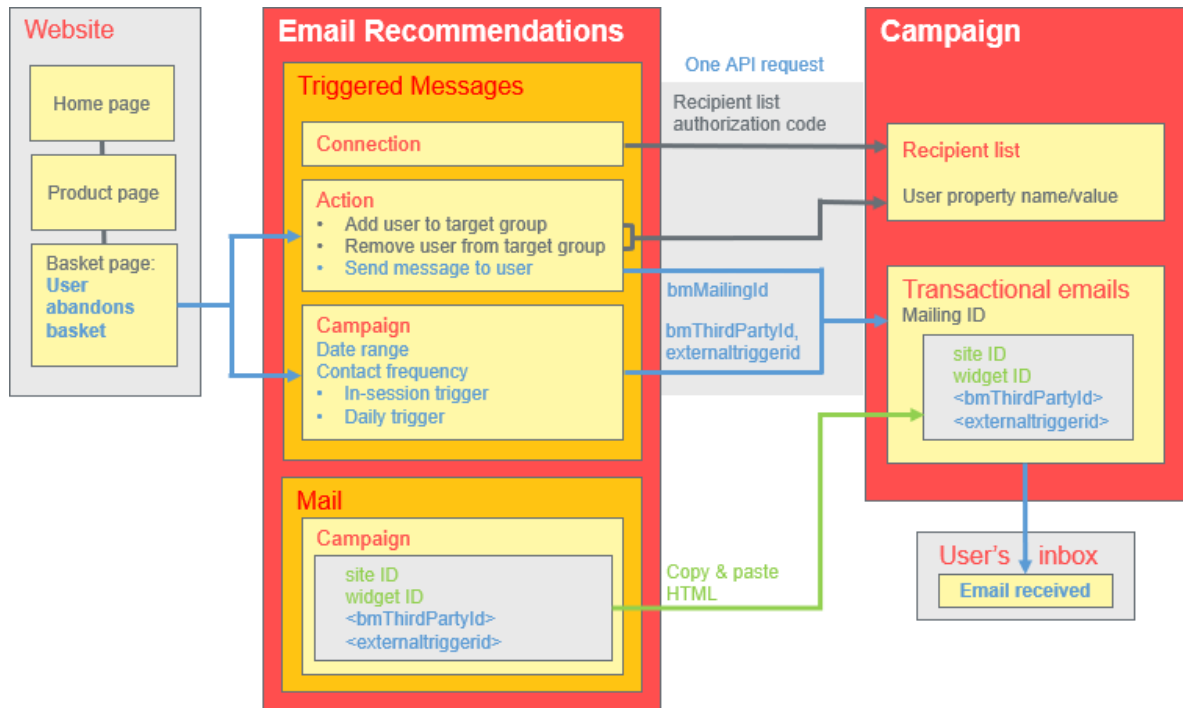
This topic describes how to connect Triggered Messages to Episerver Campaign.

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.



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 target group action](#).
 - [Setting up a Triggered Messages campaign](#) with a specific strategy, such as *Abandoned basket*.

- **Episerver Campaign portal**, set up the following:

- **Recipient list**, which include a Recipient list authorization code.

Note: To receive an email from 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.

4. Click **Manage authorization codes**.

The screenshot shows the 'API Overview' window. It contains an 'Info' section, an 'API Overview' section, and a navigation bar with 'Recipient lists' highlighted. Below is a table of recipient lists:

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

At the bottom of the table, there is a 'Manage authorisation codes' button.

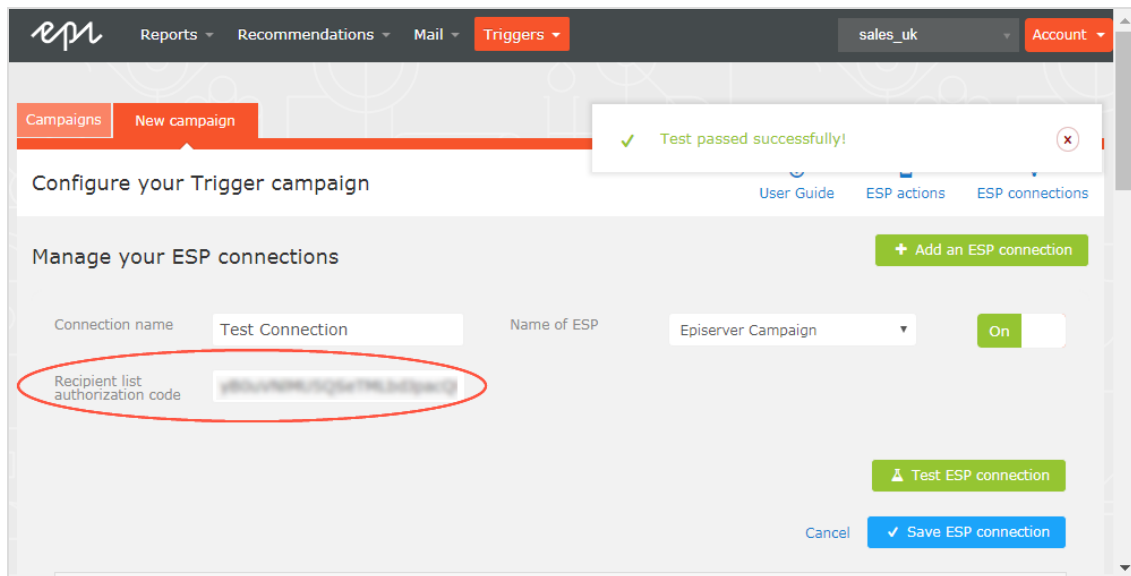
5. From the **Manage Authorization Codes** view, copy the authorization code.

The screenshot shows the 'Manage Authorisation Codes' window. It contains a table with the following data:

Authorisation code	Active	Created	Deactivated
LH7kwb720SQmxL2iDuRmvFGekjcmz	Yes	2016-11-29 17:14:18	

At the bottom of the window, there are buttons for 'Create authorisation code' and 'Deactivate authorisation code'.

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



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

Linking to a specific basket

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

For developer information, see [Linking to a specific basket](#) on Episerver World.

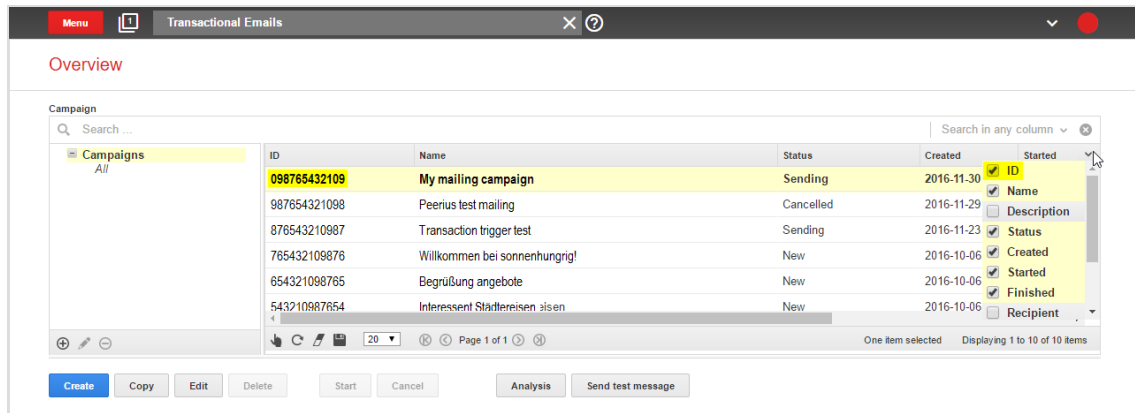
Creating an ESP action

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

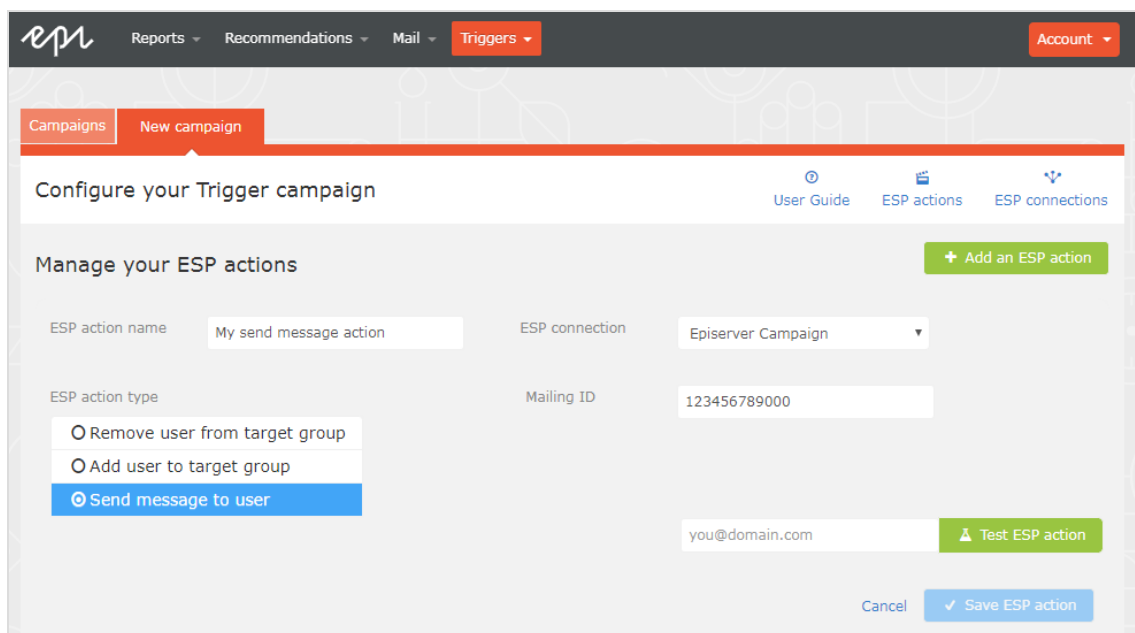
Creating a Send message action

To send messages using 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:

1. In Episerver Campaign from the start menu, go to **Campaigns > Transactional mails**.
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**.

Creating an Add user to target group action

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

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there are navigation tabs for 'Campaigns' and 'New campaign'. Below this, the main heading is 'Configure your Trigger campaign'. On the right, there are links for 'User Guide', 'ESP actions', and 'ESP connections'. The main section is 'Manage your ESP actions', which includes a '+ Add an ESP action' button. The form contains the following fields:

- ESP action name:** My add user to group action
- ESP connection:** Episerver Campaign
- ESP action type:** Radio buttons for 'Remove user from target group', 'Add user to target group' (selected), and 'Send message to user'.
- User property name:** language
- User property value:** en
- Test ESP action:** A button with a play icon and the text 'Test ESP action'.
- Save ESP action:** A blue button with a checkmark and the text 'Save ESP action'.
- Cancel:** A button with the text 'Cancel'.

- 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**.

Create a Remove user from target group action

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

The screenshot shows the 'Configure your Trigger campaign' interface. At the top, there are navigation tabs for 'Campaigns' and 'New campaign'. Below this, there are links for 'User Guide', 'ESP actions', and 'ESP connections'. The main section is titled 'Manage your ESP actions' and includes a '+ Add an ESP action' button. The form contains the following fields and options:

- ESP action name:** My remove user from group action
- ESP connection:** Episerver Campaign
- ESP action type:**
 - Remove user from target group
 - Add user to target group
 - Send message to user
- User property name:** language
- Test ESP action:** A button with a play icon and the text 'Test ESP action'.
- Save ESP action:** A blue button with a checkmark and the text 'Save ESP action'.
- Cancel:** A text link.

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

The screenshot shows the 'Configure your Mail campaign' interface. The top navigation bar includes 'Campaigns', 'New campaign', 'Product sets', and 'Customise email attributes'. The main heading is 'Configure your Mail campaign' with a 'Create a new campaign' button. Below this, there are three tabs: 'Style editor', 'Configuration', and 'HTML and preview', with 'HTML and preview' being the active tab.

The 'Generate HTML code' section features a dropdown menu for 'Email service provider' set to 'Episerver Campaign'. Below this, there are two input fields: 'Email address:' containing '{recipientid}' and 'Trigger fire ID:' containing '{externaltriggerid}'.

The main area displays the generated HTML code, which includes two recommendation blocks. Each block contains a link and an image, with attributes like href, src, alt, and title. The code uses the variables defined in the input fields.

At the bottom of the code area, there is a 'Generate code' button. Below the code area, there is a section titled 'Preview or send a test email' with an input field for an email address (currently 'you@yourcompany.com') and two buttons: 'Preview email' and 'Send test email'.

At the very bottom of the interface, there is a 'Save campaign' button and a 'Cancel' button. The footer of the page reads '© 2017 Episerver'.

8. Go to Episerver Campaign.

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

9. From the 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:

The screenshot displays the Episerver Campaign editor interface. The top navigation bar includes 'Menu', 'Edit content: My mailing campaign', and various utility buttons like 'Tour', 'Help', 'Target group', 'Test message', 'Landing pages', and 'More'. The main editor area is divided into two sections:

- Left Panel (Edit View):** Contains fields for 'Sender', 'Reply to', and 'Subject'. Below these are several content blocks:
 - A 'Text/Image' block.
 - A 'Recommendation Paragraph' block.
 - A 'Source code' block, which is highlighted in blue.
 - Another 'Text/Image' block.
 - A 'Recommendations' block.
 - A final 'Recommendation Paragraph' block.
- Right Panel (Source code View):** Shows the HTML source code for the selected 'Source code' block. The code is pre-formatted and includes three recommendation blocks, each with a comment and an href attribute:


```

<!-- RECOMMENDATION #1 -->
<!-- recommendation link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite" -->
<!-- product information link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite" -->

<!-- RECOMMENDATION #2 -->
<!-- recommendation link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite" -->
<!-- product information link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite" -->

<!-- RECOMMENDATION #3 -->
<!-- recommendation link and image for recommendation #3 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite" -->
<!-- product information link and image for recommendation #3 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite" -->
      
```

At the bottom right of the editor, there are 'Apply' and 'Close' buttons.

17. Click **Apply**.

Episerver Digital Experience Cloud

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

About Episerver

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

For more information, visit [episerver.com](https://www.episerver.com).



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