



# Episerver Triggered Messages

User Guide





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Episerver Triggered Messages User Guide

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## Triggered Messages

**Note:** The [Episerver Customer-Centric Digital Experience Platform](#) contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Episerver World](#) for technical information.

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 emails 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 [In-session and daily 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.

# In-session and daily triggers

Triggered Messages distinguishes between In-session triggers and Daily triggers. In-session triggers fire during a visitor's session when a certain criteria is met. Daily triggers fire based on a daily analysis of visitor's behavior, for example when the visitor made a purchase.

In-session and daily triggers filter out products that are inactive, out-of-stock, and not recommendable. For example, an **abandoned basket** trigger will not fire when products in user basket are out-of-stock. Also, when a basket contains one in-stock product and one out-of-stock product, the trigger fires with only one product.

## In-session triggers

In-session trigger campaigns analyze user behavior constantly (real-time) and fire actions immediately when 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 (home, category, product, basket, order confirmation, or page URL that contains a specific phrase) 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.

## 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 Product 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 Product 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 Product 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 Product Recommendations campaign to show the relevant products in the email sent.

## Trigger action limits

To avoid sending too many emails to a visitor, Triggered Messages implements limits for the number of emails that you can send.



## Per-session limit

- You can fire only one send-message action for a session. You cannot remove this limit.

## Per-campaign limit

- The limit applies only to send-message actions.
- The limit can be configured in a Triggered Messages campaign edit form under **Contact frequency**.
- The limit defined the following options:
  - **Per day**. 24 hours from the time a campaign is supposed to fire (not calendar day, from midnight to midnight).
  - **Per week**. 7 days from the time a campaign is supposed to fire.
  - **Per month**. 30 days from the time a campaign is supposed to fire.

For example, if the limit is 1 per day and a campaign fired for a visitor at 2 PM, the same campaign can fire no sooner than at 2:01 PM the next day for the same visitor.

- The following default limits apply when not configured: 5 per day, 20 per week, 50 per month.

## Per-site limit

- The limit applies only to send-message actions. It doesn't apply to add-to-group and remove-from-group actions.
- The limit can be configured per site on Triggered Messages campaign list page.
- The limit defined the following options:
  - **Per day**. 24 hours from the time a campaign is supposed to fire (not calendar day).
  - **Per week**. 7 days from the time a campaign is supposed to fire.
  - **Per month**. 30 days from the time a campaign is supposed to fire.

For example, if the limit is 1 per day and any campaign fired for a visitor at 2 PM, any other campaign can fire no sooner than at 2:01 PM the next day for the same visitor.

- The following default limits apply when not configured: 5 per day, 20 per week, 50 per month.

## Filtering triggers with expressions

Expressions filter products that do not match the expression. For an example **abandoned basket** campaign, if an abandoned basket contains two products, one that match the expression and one that does not, the campaign still fires for this basket with a single product.

You can define additional expressions for in-session and daily triggers. Expressions specify which products should fire the trigger campaign. For example, if an expression is defined as `(r.saleprice["GBP"]>"40")`, only products that are more expensive than 40 pounds fire the campaign.

You can reference products that caused a campaign trigger to fire in an Email Product Recommendations campaign through strategies. That is, *Products from in-session trigger campaign* returns products that fired the campaign and *Recommendations based on daily trigger campaign* returns recommendations that are related to the product that fired the trigger campaign.

For further information on expressions, see [Creating a new Triggered Messages campaign](#).

## Prioritizing campaigns

**Note:** Priorities apply only to situations where campaigns should fire at the same time. Lower priority campaigns with a shorter time to wait do not wait with firing for high priority campaigns with a longer time to wait.

You can prioritize triggered messages campaigns on the campaign list page in the for the Personalization Portal by dragging campaigns up or down on the list with the icon next to campaign name (first column on the list).

If two or more campaigns are supposed to fire at the exactly same time, the higher priority campaign fires first. Trigger action limits may prevent subsequent campaigns from firing.

For a sample scenario on prioritization of Triggered Messages campaigns, see [Example of trigger priorities](#).

# 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 Product Recommendations campaign that uses an appropriate trigger strategy. See [Setting up a triggered Email Product Recommendations campaign](#).

## Creating a new Triggered Messages campaign

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

1. Enter a name for your Triggered Messages campaign, such as *Test SendMessage*.
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. If you have a site in Episerver with more than one language, such as a Swiss site that has French and German languages, you can set the **Locale** to fire triggered messages based on the locale, which sends emails in the correct language.
5. **Contact frequency** appears only if you select the **Send Mail** ESP action. Set it to **On** if you want the campaign to limit the number of times a trigger can fire for each customer from this Triggered Messages campaign.

If you turn on the **Contact frequency**, 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.

In the screen image, the new trigger campaign specifies that for any visitor, the trigger fires no more than 5 times per day, and no more than 20 times per week, and no more than 50 times per month (whichever limit is reached first).

Configure your campaign

Campaign name: Test SendMessage

ESP action: Send mail

Start date: Jun 05, 2020

End date: Jun 12, 2020

Locale: All

Contact frequency: On

5 per day 20 per week 50 per month

6. Under **Strategies**, select the type of trigger this campaign should use:
  - For **In-session triggers**, specify how long (in minutes) the visitor needs to be inactive on your site before the trigger can fire. Select a waiting time between 0 and 240 minutes.
  - Unless stated otherwise, **Daily triggers** monitor the last 30 days of data. As soon as the trigger criteria are satisfied, the trigger fires. The following says that the visitor must have made a purchase 15 days ago.

Strategies

Session  Daily

Scheduled time: 09:00 Europe/London

**Daily triggers**

- Targeted discounts (last 30 days)
- High product interest (last 30 days) Viewings:
- Post purchase Days since order: 15
- Low-in-stock abandoned-basket Stock upper threshold:   
Stock lower threshold:

- You can use **Additional trigger actions** alone or in combination with an **In-session trigger**. See [Trigger action limits](#).
  - 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).

**Strategies** ▾

Session
  Daily
 How many minutes to wait

**In-session triggers**

- Abandoned checkout
- Abandoned basket
- Abandoned browse

**Additional trigger actions**

<input checked="" type="checkbox"/> Home page	Viewings <input type="text" value="5"/>
<input checked="" type="checkbox"/> Category page	Viewings <input type="text" value="3"/>
<input checked="" type="checkbox"/> Product page	Viewings <input type="text" value="3"/>
<input checked="" type="checkbox"/> Basket page	Viewings <input type="text" value="2"/>
<input checked="" type="checkbox"/> Order page	Viewings <input type="text" value="1"/>
<input type="checkbox"/> Specific page	Viewings <input type="text"/>

- Optionally, add any **Expressions** you want. Expressions let you further refine the criteria of a trigger, for example to fire only for special products, product categories or brands.

**Expressions** ▾

Age group ▾

equals to ▾

junior

x

x  
+  
▾

- Expressions only apply for the trigger **Strategies** (In-session trigger and Daily trigger), not for **Additional trigger actions**.
- A trigger fires only with products that match the **Expressions** filter. The following rules apply:
  - If none of the products for the trigger (for example an In-session trigger for abandoned basket products) match the expression, the trigger will not fire.
  - If only some products for the trigger (for example an In-session trigger for abandoned basket products) match the expression, the trigger will fire with only matching products.

**Tip:** You may have products whose prices change very frequently. To avoid sending a discount email every time a price reduction occurs for these products, you can use **Expressions** to limit the trigger requirements to selected products.

8. Click **Save campaign** when you have completed your specifications.
9. 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.

## 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 **Configuration > Triggered Messages** in your for the Personalization Portal account.
2. Select **ESP connections**.
3. Edit an existing connection or create a new one. To create a new connection, click **Create an ESP connection**. The **Manage your ESP connections** screen appears.

### Manage your ESP connections

[+ Create an ESP connection](#)

Connection name 
 Name of ESP 
 Status

Recipient list authorization code

[Test ESP connection](#)

[Save ESP connection](#) [Cancel](#)

ESP connection name	Email service provider	ESP username	ESP realm	Edit - Delete - Status
Connection	Episerver Campaign			<a href="#">Edit</a> <a href="#">Delete</a> <input checked="" type="checkbox" value="On"/>
Episerver Push	Episerver Campaign			<a href="#">Edit</a> <a href="#">Delete</a> <input checked="" type="checkbox" value="On"/>

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 **Configuration > Triggered Messages** in your for the Personalization Portal account and open a new or existing campaign.
2. Select **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 **Create 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 differ depending on the chosen **ESP connection** and the chosen **ESP action type**.

**Manage your ESP actions** + Create an ESP action

ESP action name       ESP connection

ESP action type  Remove user from target group      Mailing ID

Add user to target group

Send message to user

Test ESP action

Save ESP action Cancel

ESP action name <span style="float: right;">▼</span>	ESP connection name <span style="float: right;">↕</span>	ESP action type <span style="float: right;">↕</span>	Edit - Delete
Episerver send Push	Episerver Push	Send message	<span style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">✎</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">🗑</span>
Send mail	Connection	Send message	<span style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">✎</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">🗑</span>

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.

- **Remove user from target group.** Removes a user's email address from the group or list.
- **Add user to target 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, are 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.
- **Send message to user.** 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 use it 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:

- **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. Campaigns at the top of the table have 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 following rules apply:

- The trigger that is to fire first is prioritized.
- If campaigns are to fire at the same time, the campaign that is higher up in the table is prioritized.

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).

**Note:** Daily triggers are analyzed once a day, and the same daily trigger can fire more than once. For in-session triggers, only one in-session trigger is allowed per session.

To re-order the priority of your trigger campaigns click 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.

Manage your campaigns Create a new campaign

Search  Global contact frequency  Off

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
 1	Abandoned browse	Send mail	1 minutes	in session	Off	  
 2	Abandoned basket	Send mail	1 minutes	in session	Off	  
 3	Episerver Mobile Push Trigger	Episerver send Push	1 minutes	in session	Off	  
 4	New cart	Send mail	daily	30 days	Off	  

## Example of trigger priorities

Within one session, a visitor fulfilled the criteria of all five campaigns in the picture below.

The **Abandoned basket** campaign (position 2) fires first. Although it shares the shortest **Time to wait** with **Episerver Mobile Push Trigger** (position 3), it has a higher position in the table and therefore a higher priority. **Abandoned Browse** is on top of the table, but with a waiting time of 45 minutes it has a lower priority.

Manage your campaigns 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	Abandoned browse	Send mail	45 minutes	in session	5 per day 10 per week 20 per month	
2	Abandoned basket	Send mail	30 minutes	in session	Off	
3	Episerver Mobile Push Trigger	Episerver send Push	30 minutes	in session	1 per day 5 per week 50 per month	
4	New cart	Send mail	daily	30 days	Off	

After the **Abandoned basket** trigger fired, another In-session trigger cannot be fired as only one in-session trigger is allowed per session.

When the visitor starts a new session, only **Abandoned browse** (position 1) qualifies to fire, as now only triggers with a higher position in the table than **Abandoned basket** are considered.

If the visitor starts a third session, no further in-session trigger can be fired, because the trigger with the highest position in the table has already been fired and the daily **Global contact frequency** in this example is limited to 2.



**Note:** If at the set time of a daily trigger an in-session trigger is to fire, the trigger with the higher position in the table wins.

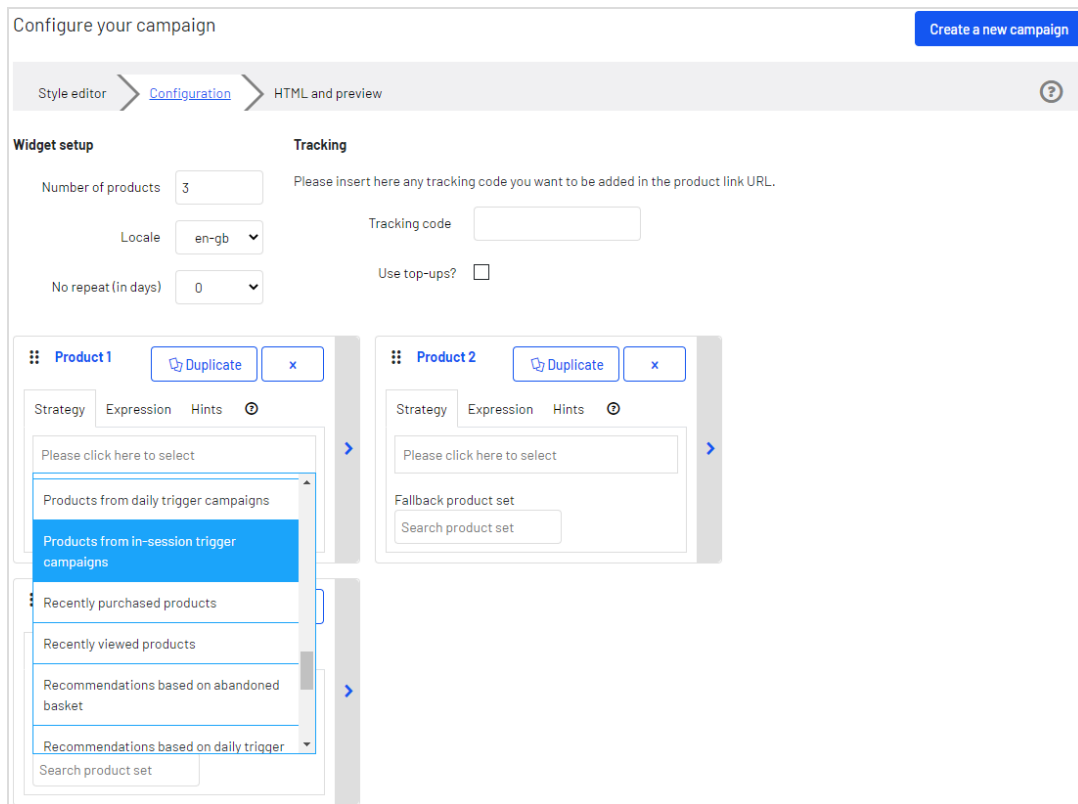
# Setting up a triggered Email Product Recommendations campaign

You can create an Email Product 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 **Email Product Recommendations**, click Create a new campaign, 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 Product 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: Episerver Campaign

**Variables**

Email address:

Trigger fire ID:



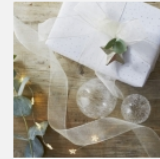
```
[externaltriggerid]></a>

<!-- Product information link and image for recommendation #2 -->
<a href="https://partnerdemo.peerius.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=1&triggerFireId={externaltriggerid}"></a>
<!-- RECOMMENDATION #3 -->
<!-- Recommendation link and image for recommendation #3 -->
<a href="https://partnerdemo.peerius.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=2&triggerFireId={externaltriggerid}"></a>

<!-- Product information link and image for recommendation #3 -->
<a href="https://partnerdemo.peerius.com/tracker/er/link.page?e={recipientid}&site=episerverdemo&wid=78301&rno=2&triggerFireId={externaltriggerid}"></a>
```

### Preview or send a test email

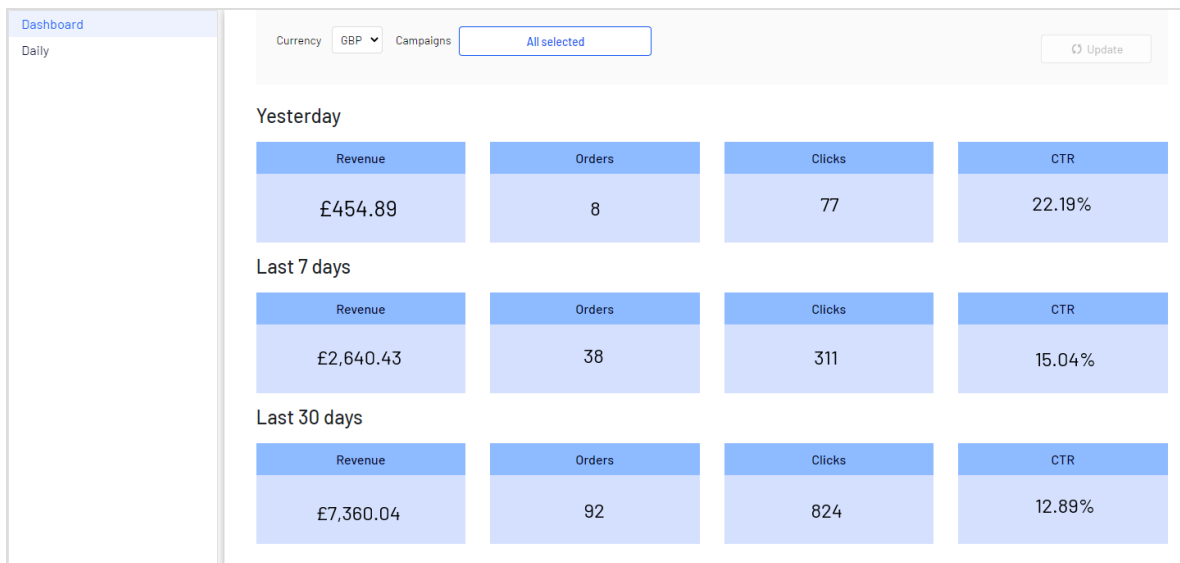
Hello,  
This is an example of what the Episerver recommendations widget will look like in an email.

 <p><b>Valencia Bed Linen Collection</b> £ 15.00</p>	 <p><b>Savoy Bed Linen Collection</b> £ 25.00</p>	 <p><b>Wired Gold Ribbon - 5m</b> £ 6.00</p>
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[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 daily report table provides a detailed breakdown of triggered messages performance. It includes a sidebar with 'Dashboard' and 'Daily' options. The main content area shows a time range selector set to 'Week' and a date range of 'May 29, 2020 - Jun 05, 2020'. The currency is set to 'GBP'. An 'Export CSV' button and an 'Update' button are present in the top right. The table has columns for Name, Date, Fired, Impressions, Clicks, Orders, and Revenue.

Name	Date	Fired	Impressions	Clicks	Orders	Revenue
<b>Total:</b>		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
<b>Total:</b>		11351	6,460	836	92	£7,244.99

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# Using Triggered Messages with Episerver Campaign

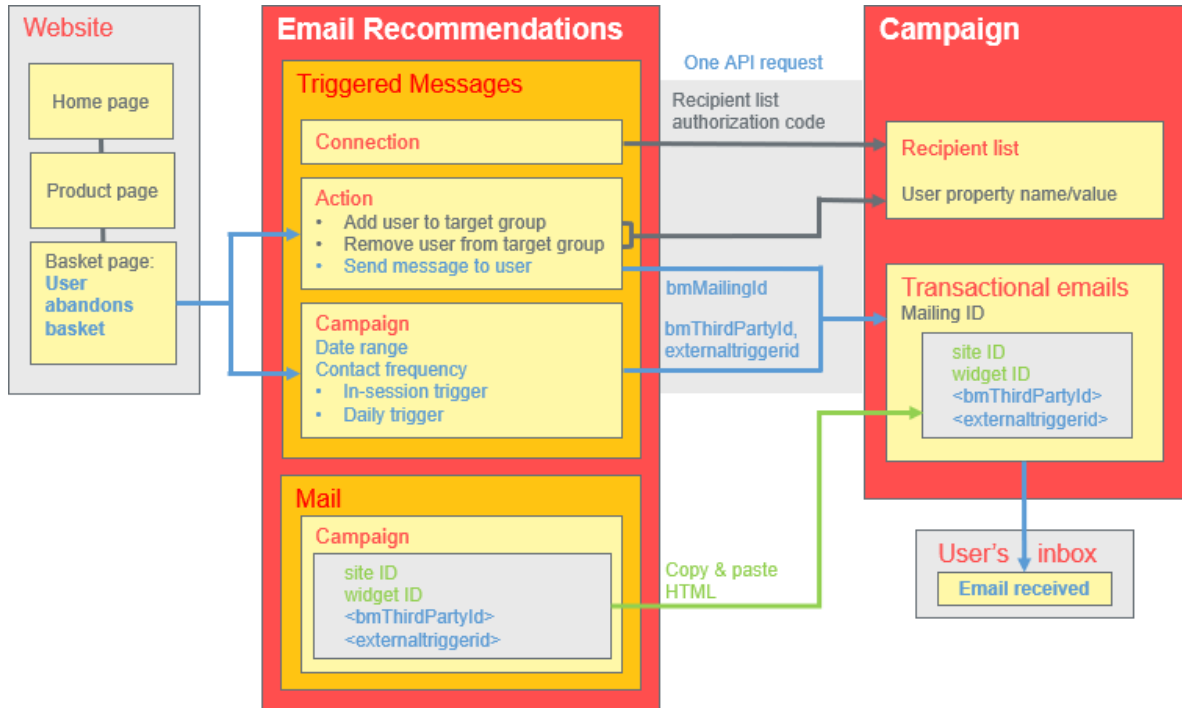
This topic describes how to connect Triggered Messages to Episerver Campaign.

**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 Product 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 users abandon 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 to user**. Specify a **Mailing ID** for the email template in Episerver Campaign. The previous chart shows this action being used. See [Creating a Send message to user 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*.

- In **Episerver Campaign**, you need the following:

- A **Recipient list**.

**Note:** For compliance reasons, Triggered Messages can only send emails to users that already exist in the recipient list.

To add new users to the recipient list and make them available for Triggered Messages, you can use a Campaign API. For more information on Campaign's APIs, see [Episerver Campaign's APIs and libraries](#).

Please note the legal requirements in the Opt-in topic in the Episerver Campaign user guide regarding the advertising consent of the recipients.

- A **Transactional mail campaign**.
- Set up an associated transactional mail campaign in Episerver Campaign by [copying the generated HTML code](#) from Email Product 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.

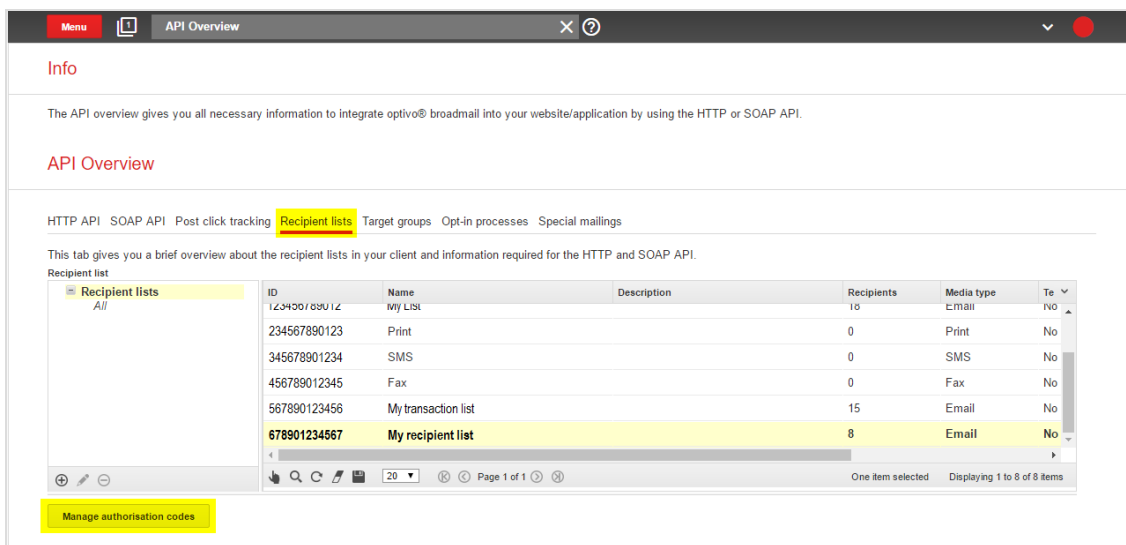
When an Episerver trigger fires, using the Episerver Campaign HTTP API, Triggered Messages sends Episerver Campaign the following for a **Send Message** action:

- **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 Product 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.

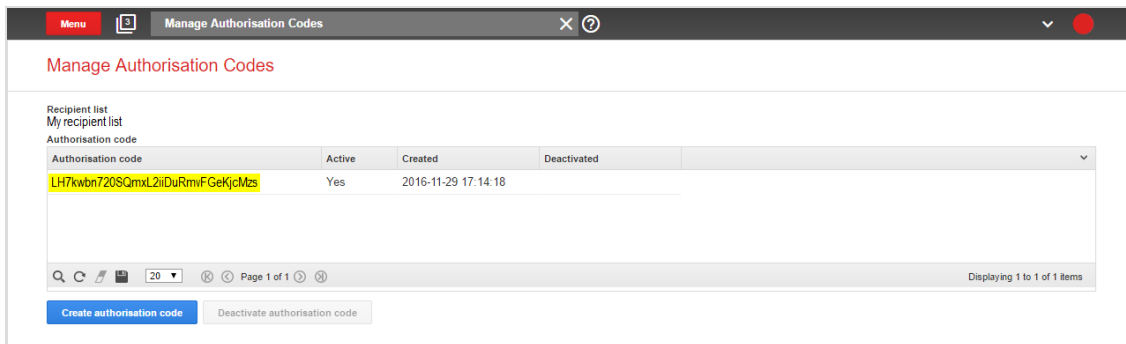
## Retrieving the Recipient list authorization code

To retrieve the Recipient list authorization code:

1. Open the start menu and select **Administration > API overview** in Episerver Campaign.
2. Select **Recipient lists** to show its table.
3. Select your recipient list from the table.
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.

The screenshot shows the Episerver Campaign interface. At the top, there's a navigation bar with 'Reports', 'Recommendations', 'Mail', and 'Triggers' (selected). Below that, there's a 'Campaigns' section with a 'New campaign' button. A green notification box at the top right says 'Test passed successfully!'. The main content area is titled 'Configure your Triggered campaign' and includes a 'Manage your ESP connections' section. This section has a '+ Add an ESP connection' button. Below that, there are fields for 'Connection name' (Test Connection), 'Name of ESP' (Episerver Campaign), and 'Recipient list authorization code' (circled in red). There's also a toggle switch set to 'On'. At the bottom right, there are buttons for 'Test ESP connection', 'Cancel', and 'Save ESP connection'.

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 [Link to a specific basket](#) on Episerver World.

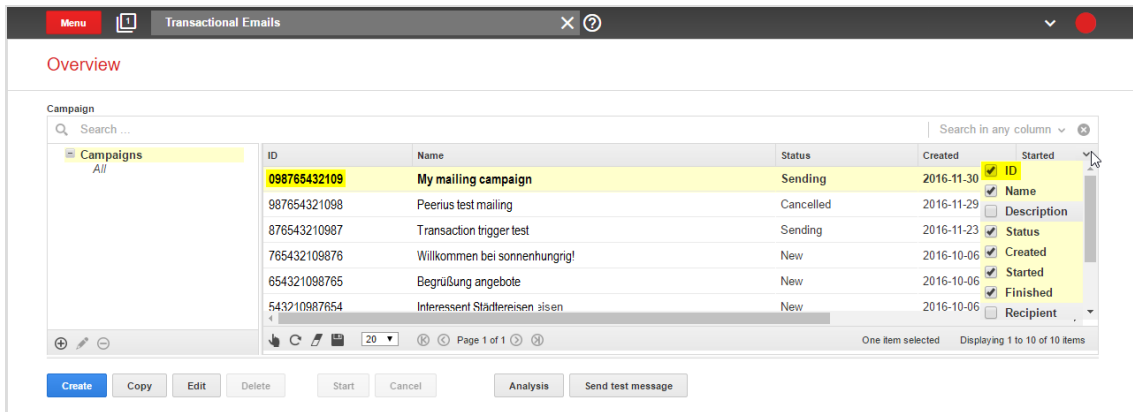
## Creating an ESP action

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

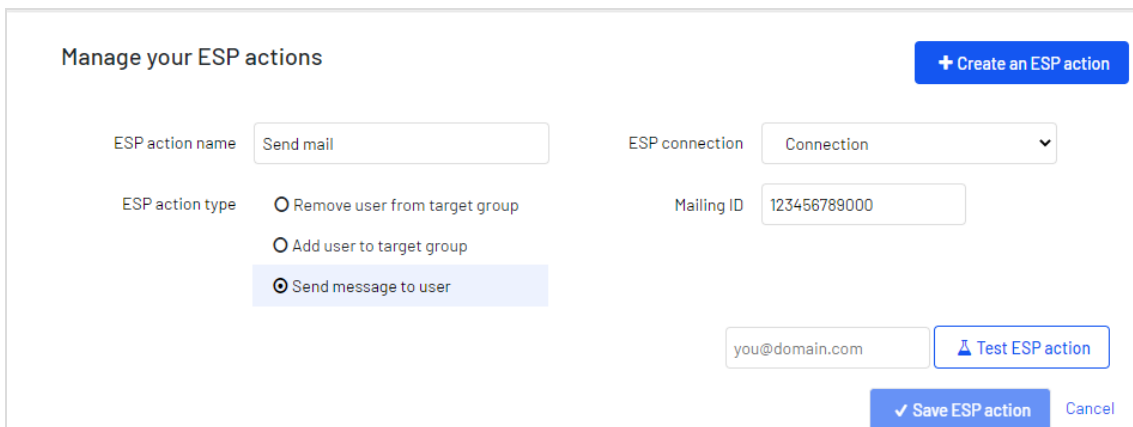
## Creating a Send message to user action

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

1. Open the start menu and select **Campaigns > Transactional mails** in Episerver Campaign.
2. Copy the **Mailing ID** for your campaign from the ID column.



3. In the Personalization Portal, go to **Configuration > Triggered Messages > ESP actions > selected action** 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 **Configuration > Triggered Messages > ESP actions > selected action**.

- 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 a form titled "Manage your ESP actions" with a "+ Create an ESP action" button in the top right. The form contains the following fields and options:

- ESP action name:** A text input field containing "Remove user".
- ESP connection:** A dropdown menu showing "Connection".
- ESP action type:** Three radio button options: "Remove user from target group" (selected), "Add user to target group", and "Send message to user".
- User property name:** A text input field containing "language".
- Email field:** A text input field containing "you@domain.com".
- Buttons:** "Test ESP action" (with a test icon), "Save ESP action" (with a checkmark icon), and "Cancel".

- 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**.

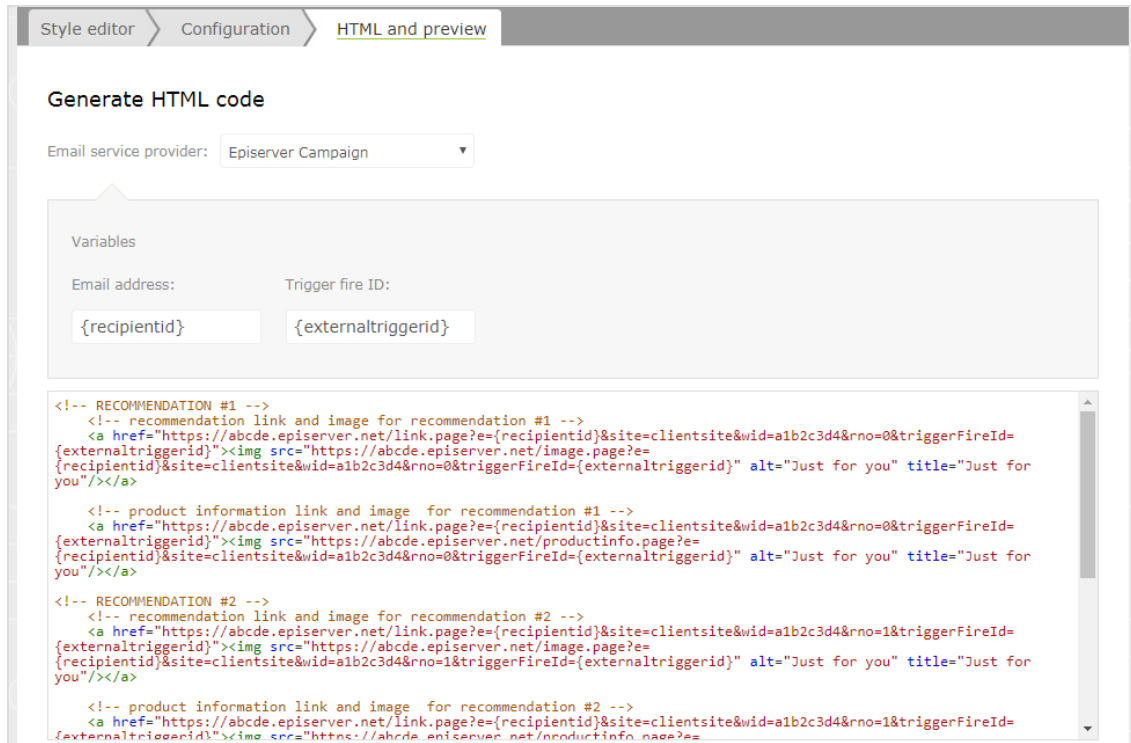
## Setting up an email campaign in Episerver

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

1. In the for the Personalization Portal, go to Email Product Recommendations > **Campaigns**.
2. Select and open your Email Product 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 'HTML and preview' tab in the Episerver Campaign editor. The 'Email service provider' is set to 'Episerver Campaign'. Under 'Variables', the 'Email address' is '{recipientid}' and the 'Trigger fire ID' is '{externaltriggerid}'. The main area displays the following HTML code:

```

<!-- RECOMMENDATION #1 -->
<!-- recommendation link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4&rno=0&triggerFireId={externaltriggerid}"></a>

<!-- product information link and image for recommendation #1 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4&rno=0&triggerFireId={externaltriggerid}"></a>


<!-- RECOMMENDATION #2 -->
<!-- recommendation link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4&rno=1&triggerFireId={externaltriggerid}"></a>

<!-- product information link and image for recommendation #2 -->
<a href="https://abcde.episerver.net/link.page?e={recipientid}&site=clientsite&wid=a1b2c3d4&rno=1&triggerFireId={externaltriggerid}"></a>

```

## 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. Open the start menu and select **Campaigns > Transactional emails**.
10. Select your email campaign.
11. Click **Edit**.
12. In the **Edit transactional mail** window that opens, click the email node and click **Edit** .
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 image below, a separate **Text/Image paragraph** was added above for the heading *Recommendation Paragraph*.
15. Click the **HTML** tab.

16. In the **Source code** field, paste the HTML code (copied in step 6):

**Note:** You can modify the HTML to add the default image size that is sent for empty images that have no products. If you do not change the HTML, the default for both width and height is 1px for empty images that have no products. For example:

```
<a href="https://abcde.episerver.net/link.page?
e={bmThirdParty}&site=clientsite&wid=12345&rno="0">
</a>
<a href="https://abcde.episerver.net/link.page?
e={bmThirdParty}&site=clientsite&wid=12345&rno="0">
</a>
```

The screenshot shows the Episerver Triggered Messages editor interface. The 'Source code' field is highlighted in yellow, displaying the HTML code for three recommendation paragraphs. The code includes links and images for each recommendation, with dynamic placeholders for recipient ID and site. The interface also shows a menu, tabs for Edit, HTML, Mobile, Text, and Online version, and buttons for Tour, Help, Target group, Test message, Landing pages, and More. The 'Source code' field is currently selected, and the HTML code is visible.

17. Click **Apply**.

# Episerver Customer-Centric Digital Experience Platform (DXP)<sup>™</sup>

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

## About Episerver

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

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



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