



SMART-trigger guide

Version 04



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Overview

SMART-trigger enables you to send automated personalised emails via an Email Service Provider that have been 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. Since Peerius captures all user behaviour, this behaviour can be used to also include alternative recommendations to abandoned or browsed products.

SMART-trigger has several preset triggers: “Abandoned checkout”, “Abandoned basket”, “Abandoned browse”, “Targeted discounts”, “High product interest”, “Post purchase”, and “Low-in-stock abandoned-basket”. See the “Types of trigger” section for a list of all the available triggers and their descriptions. New options are constantly being added – talk to your Peerius Account Manager about what’s available and of any specific requirements you may have.

In order to enable SMART-trigger functionality, you need to set up the configuration in SMART-manager so that Peerius and the ESP platform are able to communicate with each other to send the right message at the right time. See the section “Setting up an ESP connection in Peerius”. Note that the configuration will be different for each Email Service Provider. Peerius SMART-trigger can work with any ESP, which means SMART-trigger and SMART-mail can be migrated to any provider that may be selected in the future.

By using SMART-trigger alone, you can add users automatically to an email list/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 SMART-mail, you have the power to include specific products that are of interest to the user – both their browsed and abandoned products, as well as recommendations based on their on-site behaviour.

Types of trigger

SMART-trigger provides a selection of preset triggers to choose from. These are separated into two groups: in-session triggers and daily triggers.

In-session triggers

These triggers can be fired during each user’s individual session as soon as the trigger criteria are met. Each in-session trigger has a wait time – this specifies how much time the visitor must have been inactive for before the trigger can fire.

In-session triggers	Description
Abandoned checkout	Fires when a user enters the checkout flow but does not complete the purchase.
Abandoned basket	Fires when a user adds an item to the basket but does not purchase it.
Abandoned browse	Fires when a user visits a product page on the site but leaves the site without adding anything to the basket.
Additional trigger actions	Fires when a user navigates to a specific page a chosen number of times. For example, a user visits a particular section of the site and views more than 5 pages in a category but does not purchase. Can be used alone or combined with another in-session trigger.

New options are constantly being added – talk to your Peerius Account Manager about what’s available and of any specific requirements you may have.



Daily triggers

These triggers are scheduled for analysis each day at a specific time.

Daily trigger	Description
Targeted discounts	Fires when a product the user has viewed but not purchased in the past 30 days has decreased in price. Analysis runs as soon as the product feed is imported. Can be combined with a SMART-mail campaign to show the discounted products in the email sent.
High product interest	Fires when a user has visited the same product multiple times without purchasing it in the last 30 days. It counts how many unique days the product page has been viewed in the last 30 days. Duration of each view is not considered. Analysis runs at 01:00 UK time. Can be combined with a SMART-mail campaign to show the viewed products in the email sent.
Post-purchase	Fires a specified number of days after an order is placed. Can be combined with a SMART-mail campaign to show the purchased products in the email sent. Analysis runs at 01:00 UK time.
Low-in-stock abandoned-basket	Fires when a product the user has added to their basket in the last 14 days, but not purchased, is getting low in stock. The basket is considered abandoned after 4 hours of inactivity. Upper and lower thresholds of stock availability need to be specified. Analysis runs as soon as the product feed is imported. Can be combined with a SMART-mail campaign to show the relevant products in the email sent.

New options are constantly being added – talk to your Peerius Account Manager about what’s available and of any specific requirements you may have.

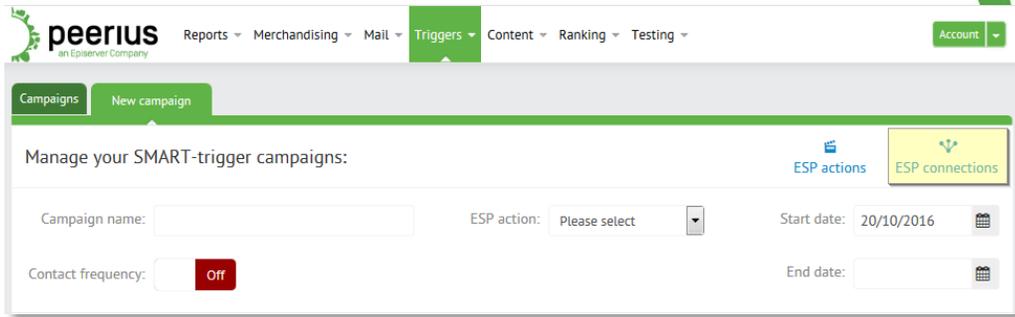
Setting up a SMART-trigger campaign

Any SMART-trigger campaign needs to be set up in SMART-manager. Each trigger campaign needs to have an associated ESP connection and ESP action. You only need to set up the ESP connection and the ESP action once, and these can act on all your trigger campaigns.

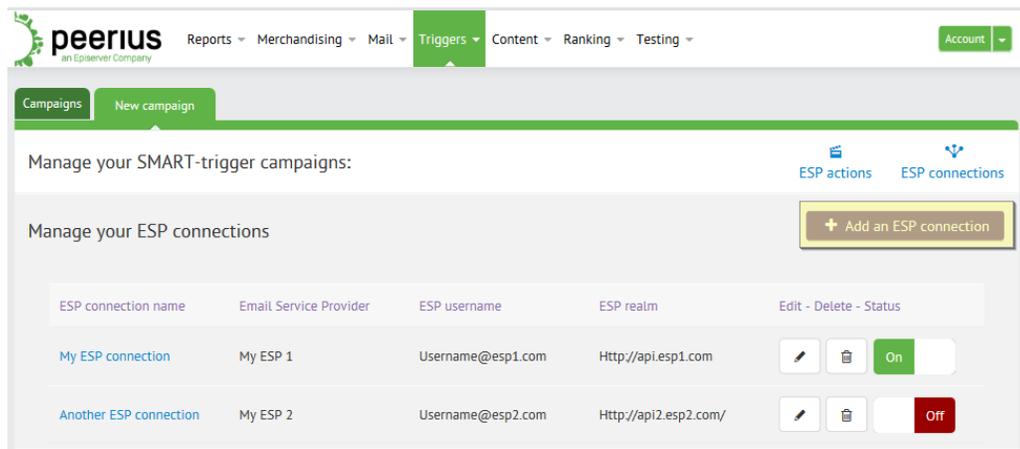
Setting up an ESP connection in Peerius

Peerius needs to be able to connect to the ESP’s API. This is so that when the trigger is fired, Peerius can alert the ESP to perform an action.

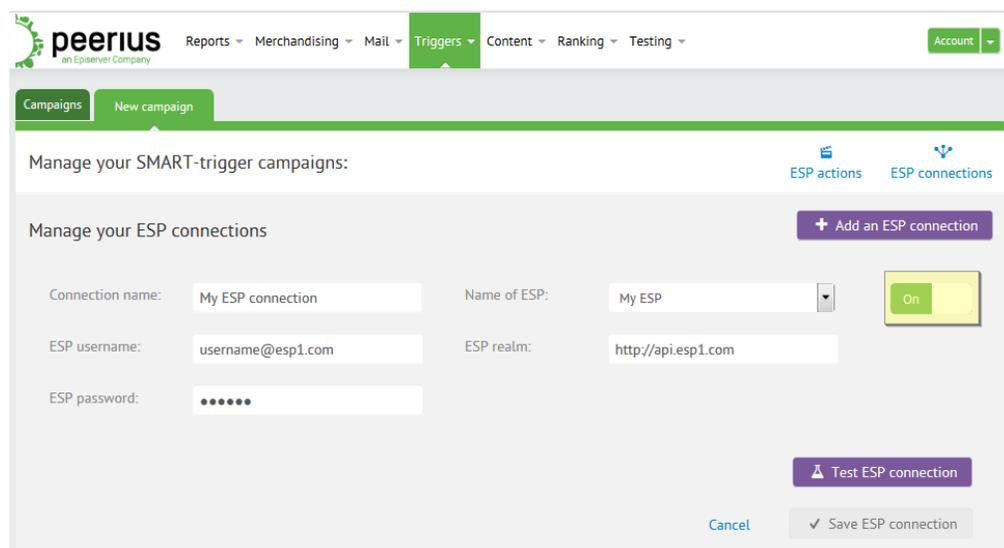
To set up the connection, navigate to “Triggers” in your SMART-manager account. Click on “New campaign” and then on “ESP connections” in the top right, as highlighted in the screenshot below.



You can edit an existing connection or create a new one. To create a new connection, click on the “Add an ESP connection” button in the top right corner (as highlighted in the screenshot below).



To create a connection, you need the API credentials for your ESP account (e.g. username, password, database, realm, API token). Once you've entered these credentials, test the connection, save it, then activate it by clicking the button highlighted in the screenshot below – when it's green 'ON' it means the connection is active.



Next, click on “ESP actions” in the top right of the screen.



Setting up an ESP action in Peerius

To set up the action, navigate to “Triggers” in your SMART-manager account and open a new or existing campaign. Click on “ESP actions” in the top right, as highlighted in the screenshot below.

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/edited in previous step.

The screenshot shows the Peerius interface for configuring an ESP action. The top navigation bar includes 'Reports', 'Merchandising', 'Mail', 'Triggers', 'Content', 'Ranking', and 'Testing'. The 'Triggers' menu is active. Below the navigation, there are tabs for 'Campaigns' and 'New campaign'. The main content area is titled 'Manage your SMART-trigger campaigns:' and contains a sub-section 'Manage your ESP action'. This section includes a '+ Add an ESP action' button and several input fields: 'ESP action name' (My ESP action), 'ESP connection' (My ESP connection), 'ESP action type' (radio buttons for 'Add user to group', 'Send message', and 'Remove user from group', with 'Send message' selected), and 'Message ID' (123456). There is also an email address field (you@domain.com) and a 'Test ESP action' button. At the bottom, there are 'Cancel' and 'Save ESP action' buttons.

Choose your preferred “ESP action type” from the available options and enter the required details (e.g. Group ID, List ID, Message ID, Database) – the values of which are available from your ESP portal. Note, these fields are dynamic and will differ depending on the chosen “ESP connection” and the chosen “ESP action type”.

Available action types are:

- **Add user to group (preferred)** – A fired trigger will tell the ESP to add the 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. Note, this action just adds users’ email addresses to a list, it doesn’t send those users any emails.
- **Remove user from group** – Same as add user to group but has the opposite effect.
- **Send message (caution!)** – A fired trigger will tell the ESP to send the message with the specified “Message ID” to the user. Warning: this will not check that the user has opted in to the emailing scheme, so should be used with **caution**.

Once you have created your ESP action, you must test it and then save it. You can click again on the “ESP action” link to close the action configuration section. Now you should see the fields for configuring a new trigger.



Creating a new trigger campaign in Peerius

Navigate to “Triggers” in your SMART-manager account. To create a new trigger campaign, click on the “New campaign” tab and fill out the form as follows:

1. Enter a name for your SMART-trigger campaign
2. So that the trigger performs the desired action when it fires, select an “ESP action”, for example, the one you created/edited in one of the previous steps.
2. Specify a start date and an end date for the campaign, if desired.
3. If you wish to limit the number of emails a customer may receive from this campaign, turn on the contact frequency button.
 - Specify the maximum number of emails that can be sent to each user by this campaign per day, per week, or per month.
 - Note that the “Global contact frequency” could stop emails being sent if its limit is reached first.
4. Choose what type of trigger this campaign should use. See the “Types of trigger” section above.
 - For in-session triggers, you need to specify how long the visitor needs to have been inactive for on your site before the trigger can fire.
 - Daily triggers monitor the last 30 days of data. As soon as the trigger criteria are satisfied, the trigger fires.
 - Additional trigger actions can be used 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. Also, you can specify a URL (or a keyword from a URL) from your site that the customer must have visited. Note that the order of additional trigger actions is not considered. 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).

The screenshot shows the Peerius SMART-manager interface for creating a new campaign. The top navigation bar includes 'Reports', 'Merchandising', 'Mail', 'Triggers', 'Content', 'Ranking', and 'Testing'. The 'Triggers' menu is active. Below the navigation, there are tabs for 'Campaigns' and 'New campaign'. The main content area is titled 'Manage your SMART-trigger campaigns:' and includes links for 'ESP actions' and 'ESP connections'. The form fields are as follows:

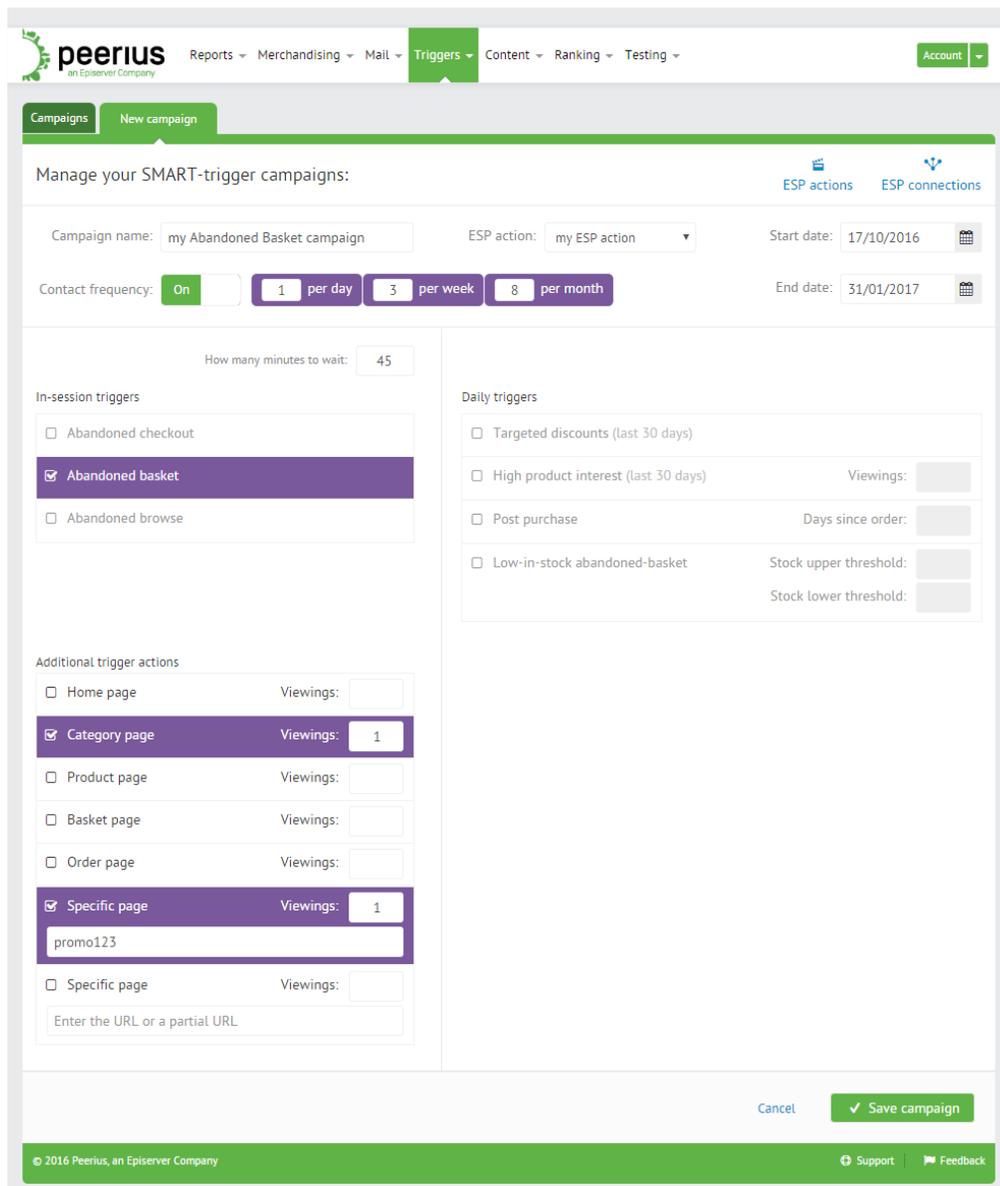
- Campaign name: my Abandoned Basket campaign
- ESP action: my ESP action
- Start date: 17/10/2016
- End date: (empty)
- Contact frequency: Off
- How many minutes to wait: 45

The form is divided into two sections for trigger types:

- In-session triggers:**
 - Abandoned checkout
 - Abandoned basket
 - Abandoned browse
- Daily triggers:**
 - Targeted discounts (last 30 days)
 - High product interest (last 30 days) Viewings: (input field)
 - Post purchase Days since order: (input field)
 - Low-in-stock abandoned-basket Stock upper threshold: (input field) Stock lower threshold: (input field)

In the example below:

- Any customer will receive from this trigger campaign no more than 1 email per day, and no more than 3 emails per week, and no more than 8 emails per month (whichever limit is reached first).
- The customer must have abandoned their basket, i.e. placed at least one item in the basket and not completed the order after being inactive for (in this case) 45 minutes.
- The customer must have visited a category page at least once. (Note, you can specify “o” if you wish the user to not have visited this type of page.)
- You can also add a specific URL match – in this case the user must have visited a page with the string “promo123” somewhere in the URL.
- If all these criteria are satisfied, the trigger will fire (unless prevented by a global contact frequency restriction).



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Reports ▾ Merchandising ▾ Mail ▾ Triggers ▾ Content ▾ Ranking ▾ Testing ▾ Account ▾

Campaigns New campaign

Manage your SMART-trigger campaigns: ESP actions ESP connections

Campaign name: ESP action: Start date:

Contact frequency: On 1 per day 3 per week 8 per month End date:

How many minutes to wait:

In-session triggers

Abandoned checkout

Abandoned basket

Abandoned browse

Daily triggers

Targeted discounts (last 30 days)

High product interest (last 30 days) Viewings:

Post purchase Days since order:

Low-in-stock abandoned-basket Stock upper threshold:
Stock lower threshold:

Additional trigger actions

Home page Viewings:

Category page Viewings:

Product page Viewings:

Basket page Viewings:

Order page Viewings:

Specific page Viewings:

Specific page Viewings:

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Don't forget to click the "Save campaign" button once you have completed your changes.

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.



Managing trigger campaigns in Peerius

Navigate to "Triggers" in your SMART-manager account and click on the "Campaigns" tab.

This page allows you to

- set a "Global contact frequency"
- edit a campaign
- activate/deactivate a campaign
- delete a campaign
- prioritise trigger campaigns.

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Sale Booster	Send Sale Booster email	10 minutes	in session	Off	[Edit] [Status] [Delete]
2	My Abandoned Basket campaign	My ESP action	45 minutes	in session	1 per day 3 per week 8 per month	[Edit] [Status] [Delete]
3	Abandoned Checkout	Send Abandoned Checkout email	180 minutes	in session	Off	[Edit] [Status] [Delete]
4	Post-purchase Follow Up	Add to list	120 minutes	in session	Off	[Edit] [Status] [Delete]
5	Abandoned Browse	Add to list "Abandoned Browse"	200 minutes	in session	Off	[Edit] [Status] [Delete]

Global contact frequency

This limits the firing of triggers from all the campaigns listed on the page. That is, for all campaigns combined, you can specify the maximum number of triggered emails that can be sent to any one customer. Note that an individual campaign's "Contact frequency" could stop emails being sent for that campaign if its limit is reached first.

Edit – Status – Delete

Clicking on a campaign name or clicking its edit button opens the configuration page for that campaign allowing you to edit it.

Each campaign's status button shows whether the campaign is active or not. Clicking the status button changes the campaign's state. Note that the initial state of a newly created trigger is OFF.

Clicking the delete button for a campaign will delete that campaign, after you've confirmed that's what you want to do.



Prioritising trigger campaigns

On the “Campaigns” page, you can sort your trigger campaigns in the order you wish for them to be fired – with those at the top of the table having the highest priority, and those at the bottom the lowest. This order is especially important if you restrict the number of emails that any one customer may receive (by defining a “Global contact frequency”).

Once a campaign’s trigger has fired, only the trigger from a 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 SMART-manager, if one of the triggers fires, any trigger below it in the list will be prevented from firing that day (resets at 00:00 UK time). It’s possible for the same trigger to fire twice.

To re-order the priority of your trigger campaigns click on the Priority button to the left of a campaign’s name, and drag the campaign to the desired position in the table.

Priority	Campaign name	ESP action name	Time to wait	Monitoring period	Contact frequency	Edit - Status - Delete
1	Sale Booster	Send Sale Booster email	10 minutes	in session	Off	[Edit] [Play] [Delete]
2	My Abandoned Basket campaign	My ESP action	45 minutes	in session	1 per day 3 per week 8 per month	[Edit] [Play] [Delete]
3	Abandoned Checkout	Send Abandoned Checkout email	180 minutes	in session	Off	[Edit] [Pause] [Delete]
4	Post-purchase Follow Up	Add to list	120 minutes	in session	Off	[Edit] [Play] [Delete]
5	Abandoned Browse	Add to list "Abandoned Browse"	200 minutes	in session	Off	[Edit] [Play] [Delete]

Setting up a SMART-mail campaign in Peerius

Now that you have set up the desired triggers in SMART-manager, you can create a SMART-mail campaign to return abandoned or personalised products in the email. Click on the “Mail > New campaign” tab and the system will take you through the set up process.

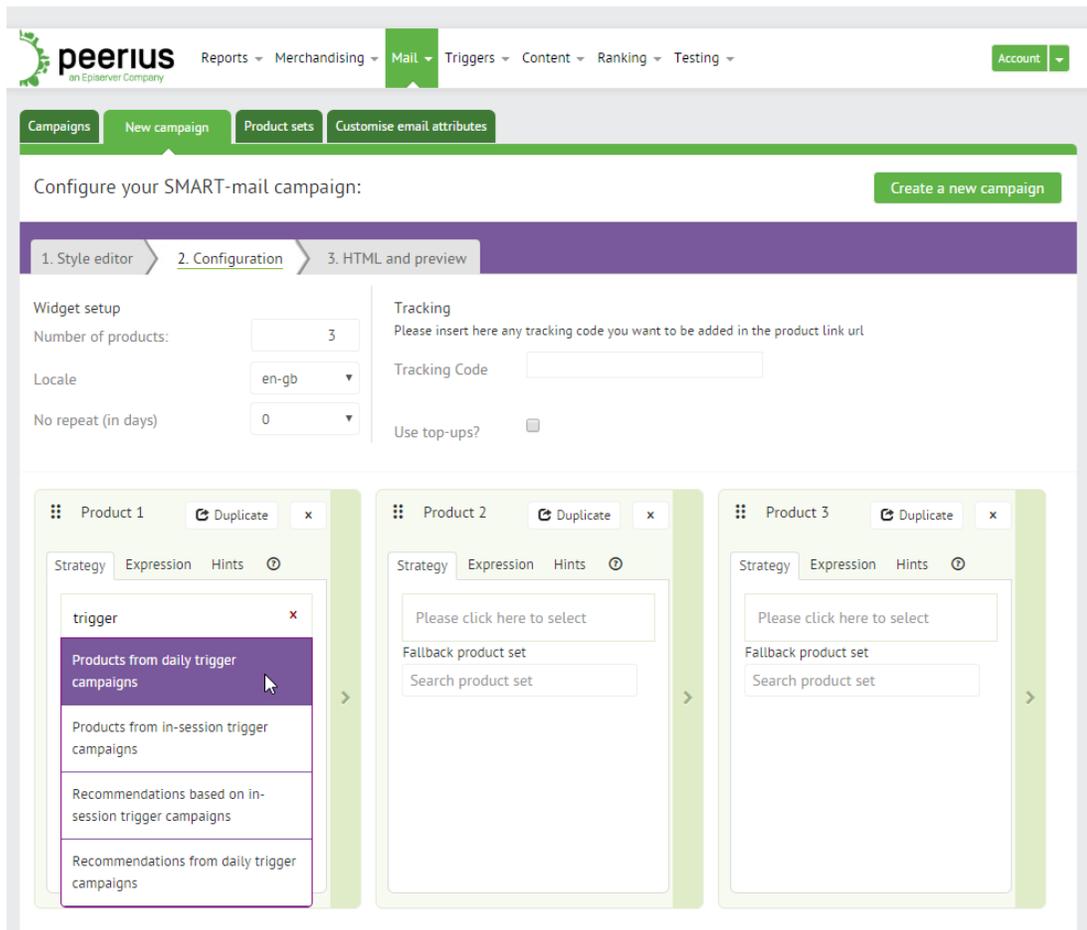
Style editor

The first step is to create the front-end styling of the abandoned or recommended products that will be displayed in the email.

Configuration

The second step is to set up the email widget. Currently, there are four trigger strategies available:

- **Products from daily trigger campaigns** – this will return the products from your daily trigger campaign, e.g. Targeted Discounts, High Product Interest.
- **Products from in-session trigger campaigns** – this will return the abandoned products from your in-session trigger campaign, e.g. Abandoned Basket, Abandoned Browse, Abandoned Checkout.
- **Recommendations based on daily trigger campaigns** – this will return related products based on the trigger used, e.g. Targeted Discounts, High Product Interest.
- **Recommendations based on in-session trigger campaigns** – this will return related products based on the trigger used, e.g. abandoned basket, browse or checkout, for the current session.



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Campaigns New campaign Product sets Customise email attributes

Configure your SMART-mail campaign: Create a new campaign

1. Style editor 2. Configuration 3. HTML and preview

Widget setup
 Number of products: 3
 Locale: en-gb
 No repeat (in days): 0

Tracking
 Please insert here any tracking code you want to be added in the product link url
 Tracking Code:
 Use top-ups?

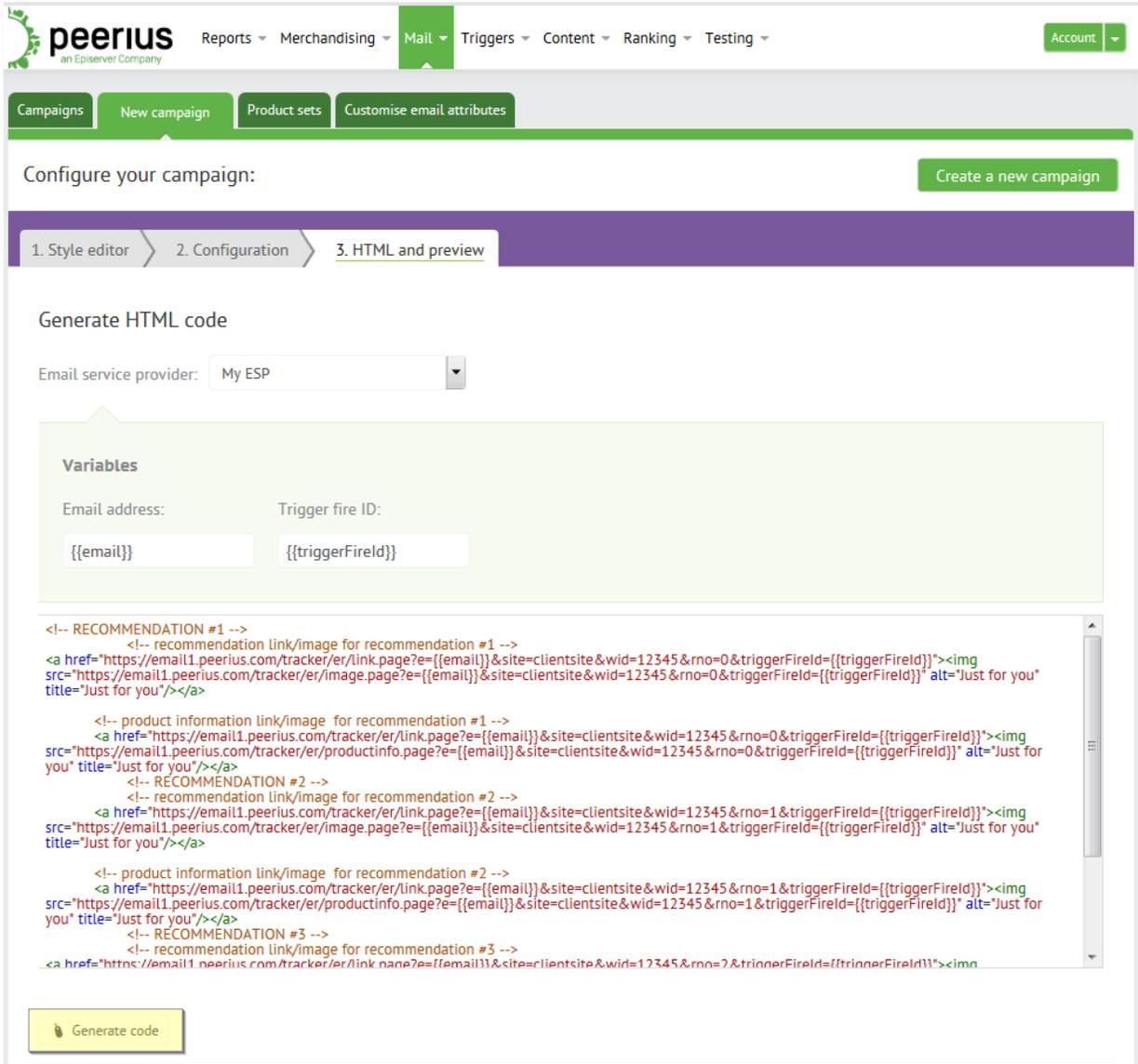
Product 1 Duplicate x
 Strategy Expression Hints ⓘ
 trigger x
 Products from daily trigger campaigns
 Products from in-session trigger campaigns
 Recommendations based on in-session trigger campaigns
 Recommendations from daily trigger campaigns

Product 2 Duplicate x
 Strategy Expression Hints ⓘ
 Please click here to select
 Fallback product set
 Search product set

Product 3 Duplicate x
 Strategy Expression Hints ⓘ
 Please click here to select
 Fallback product set
 Search product set

Preview

The third step of the process is to generate the code to copy and insert into your email template later, and to preview the email content. Select the correct ESP in the 'Placeholder style' drop-down menu, so the correct placeholders are automatically populated in the generated code. You will need to insert this code in the email template created in your ESP account.



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Campaigns New campaign Product sets Customise email attributes

Configure your campaign: Create a new campaign

1. Style editor 2. Configuration 3. HTML and preview

Generate HTML code

Email service provider: My ESP

Variables

Email address: Trigger fire ID:

{{email}} {{triggerFireId}}

```
<!-- RECOMMENDATION #1 -->
<!-- recommendation link/image for recommendation #1 -->
<a href="https://email1.peerius.com/tracker/er/link.page?e={{email}}&site=clientsite&wid=12345&rno=0&triggerFireId={{triggerFireId}}"></a>

<!-- product information link/image for recommendation #1 -->
<a href="https://email1.peerius.com/tracker/er/link.page?e={{email}}&site=clientsite&wid=12345&rno=0&triggerFireId={{triggerFireId}}"></a>

<!-- RECOMMENDATION #2 -->
<!-- recommendation link/image for recommendation #2 -->
<a href="https://email1.peerius.com/tracker/er/link.page?e={{email}}&site=clientsite&wid=12345&rno=1&triggerFireId={{triggerFireId}}"></a>

<!-- product information link/image for recommendation #2 -->
<a href="https://email1.peerius.com/tracker/er/link.page?e={{email}}&site=clientsite&wid=12345&rno=1&triggerFireId={{triggerFireId}}"></a>

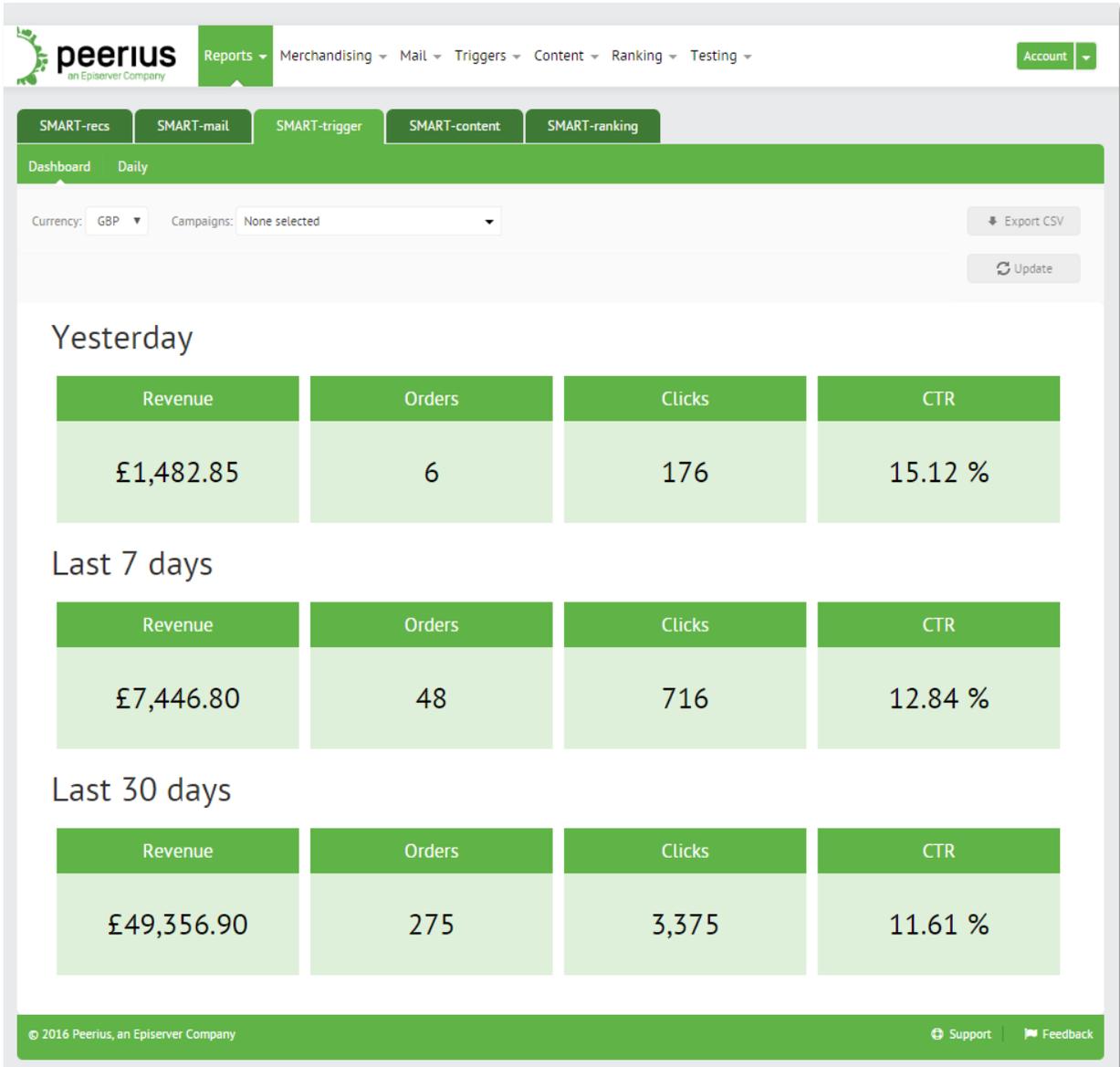
<!-- RECOMMENDATION #3 -->
<!-- recommendation link/image for recommendation #3 -->
<a href="https://email1.peerius.com/tracker/er/link.page?e={{email}}&site=clientsite&wid=12345&rno=2&triggerFireId={{triggerFireId}}"><img
```

Generate code

For a more detailed guide on how to create a SMART-mail campaign, please refer to the SMART-mail User Manual available on the [Peerius Knowledge Base](#).

SMART-trigger reporting in Peerius

In the reporting section in SMART-manager, there is a SMART-trigger dashboard showing the revenue, orders, clicks, and click-through-rate for your trigger campaigns.



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SMART-recs SMART-mail **SMART-trigger** SMART-content SMART-ranking

Dashboard Daily

Currency: GBP ▾ Campaigns: None selected ▾ Export CSV

Update

Yesterday

Revenue	Orders	Clicks	CTR
£1,482.85	6	176	15.12 %

Last 7 days

Revenue	Orders	Clicks	CTR
£7,446.80	48	716	12.84 %

Last 30 days

Revenue	Orders	Clicks	CTR
£49,356.90	275	3,375	11.61 %

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Also, there is a daily report showing how many website sessions fired a trigger.

It also reveals how many triggered emails were viewed and how many products were purchased through a Peerius-generated link from those emails. This is reported for each trigger and broken down to daily reporting. See the following example screenshot.



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Reports Merchandising Mail Triggers Content Ranking Testing Account

SMART-recs SMART-mail SMART-trigger SMART-content SMART-ranking

Dashboard Daily

Time range: Week Month 3 Months 10-10-2016 - 17-10-2016 Currency: GBP Export CSV Update

Name	Date	Fired	Impressions	Clicks	Orders	Revenue
Total:		11227	5,577	716	48	£7,446.80
↑ Abandoned browse	-	10580	5,004	638	34	£4,560.80
	10-10-2016	1114	801	111	1	£202.95
	11-10-2016	3401	1,200	143	11	£1,000.75
	12-10-2016	1415	910	104	11	£1,334.45
	13-10-2016	492	414	40	2	£262.95
	14-10-2016	515	318	42	4	£625.85
	15-10-2016	469	268	39	0	£0.00
	16-10-2016	3174	1,093	159	5	£1,133.85
↓ AbandonedBasket	-	647	573	78	14	£2,886.00
Total:		11227	5,577	716	48	£7,446.80

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If you have any questions regarding SMART-trigger, please get in touch with your Peerius Customer Success Manager or email the Peerius Service Desk at servicedesk@peerius.com.