Creatio Academy

Trigger email

Version 8.0

Table of Contents

Create a trigger email

PRODUCTS: MARKETING

Creatio sends **trigger emails** automatically when new participants are added as part of a campaign.

> **Note.** You can only send trigger emails in Creatio automatically. You can also create a business process that will add participants to a trigger email. However, this requires custom coding.

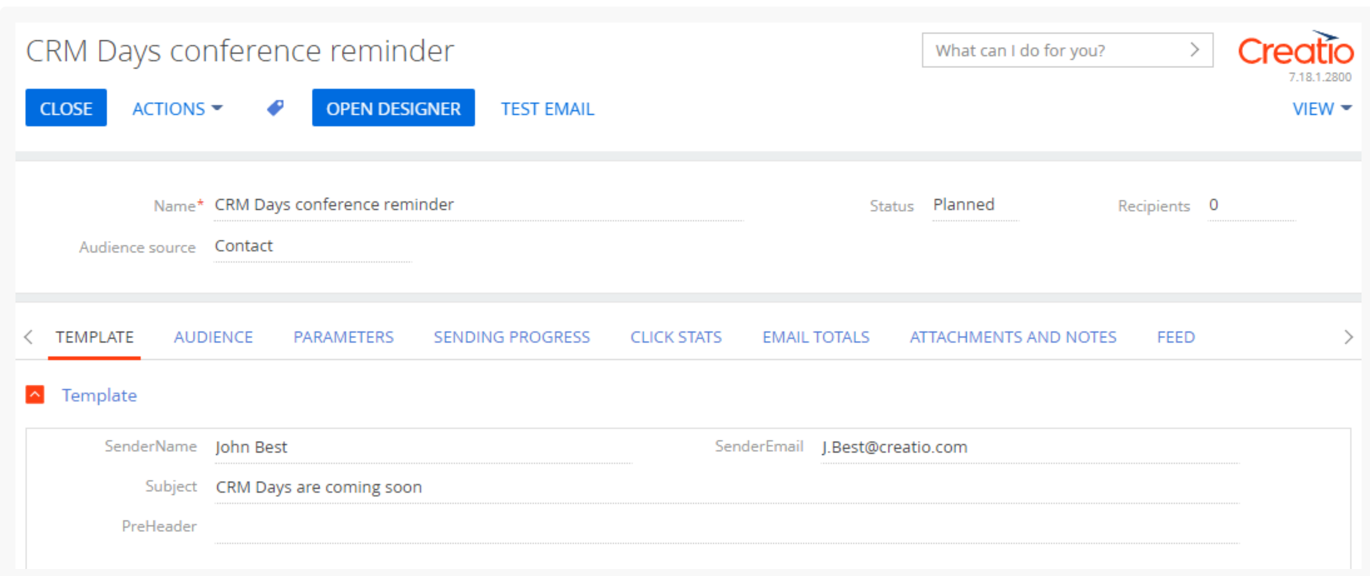
For example, send a trigger email when a visitor signs up with your site. Use trigger emails to send interest-based messages tailored to a specific customer at a given moment: welcome emails, order confirmations, birthday wishes, sale end date reminders, etc.

You can stop trigger emails manually. Learn more: Stop an email.

Fill out the trigger email data

1. Go to the [*Email*] section.
2. Click [*New*] and select [*Trigger email*].
3. Fill out the [*Name*] field – specify the name of the new trigger email. The name will be displayed in the [*Email*] section list only, the recipients will not see it (Fig. 1).

Fig. 1 Create a trigger email



4. Set up the email template in the content designer. Learn more: Create an email template.
5. Select the **email type** on the [*Parameters*] tab. The email type is used when performing a subscription to a specific type of content.

   We recommend **sending test emails** before you start your email. This enables checking of macro values and contents display in the email. Learn more: Send a test email.

Add a trigger email audience

In Creatio, the audience of a trigger email is formed automatically based on the campaign audience and participant responses at a campaign step. The audience of a trigger email is formed when a participant moves to a campaign element that is connected to the corresponding trigger email. The campaign element adds participants based on the conditions you specify while setting it up. Learn more: Campaign element reference.

In this case, the recipient's email is checked for validity. This is necessary to ensure that trigger emails are sent to only those contacts who are interested and to minimize the number of delivery errors. Learn more: Start sending trigger emails.

Set up tracking of clicks from a trigger email

Add the UTM tracking codes to the email to receive information about the number of clicks from the email. For instance, you can track the number of leads received from the email.

1. Go to the **Parameters** tab on the email page.
2. Select the **Use UTM tracking codes** checkbox in the [*Email-to-website click tracking*] block. Specify the UTM tracking codes: “utm_source,” “utm_campaign,” and “utm_medium.”
3. In the “List of domains” filed, specify the list of domains for which the tracking codes will be applied when generating the click link. You can specify multiple domains using commas (,).
4. Save the changes.

Start sending trigger emails

PRODUCTS: MARKETING

Trigger emails are sent automatically, upon a specific event. For instance, whenever a new participant enters a campaign, Creatio sends a trigger email to that participant. The sending method of a trigger email is determined by the campaign in which the trigger email is included. There are three sending methods:

- **Daily** at a specified time with the option to specify a delay up to several days. Trigger email will be sent to the contacts who moved to the corresponding step in the campaign. For example, you can send educational content on your software product in three days after the trial version order.
- **After a defined time** – sent after some time after an event. For example, you can send a trigger email 15 minutes after a customer leaves your website without placing an order but did add products to the cart. Such emails are sent throughout the day.
- **Event-based** – sent after a certain event. For example, this can be a welcome letter after filling out the landing form.

We recommend **sending test emails** before you start your email. This enables checking of macro values and contents display in the email. Learn more about test emails: Send a test email.

Attention. Email domain verification is required to start sending the email.

You can stop trigger emails manually. Learn more: Stop an email.

Set up a trigger email

1. **Create a new campaign** in the [*Campaigns*] section.
2. **Include the trigger email in the campaign** and set the sending conditions. For example, emails can be sent after an event is finished or daily at a specified time. Add other items in the campaign if needed.
3. **Start the campaign** that is connected to the trigger email. The trigger email will be sent automatically after the campaign has launched. The audience for the trigger email can be formed automatically.
4. **Analyze the totals** of the trigger email and email conversion for this recipient.

Trigger email check-up

An email recipient validity check is also performed during the sending of a trigger email. For example, while assigning the audience, a customer may unsubscribe from your email or a customer's email inbox may become unavailable. To take into account such changes, a check is performed upon sending emails.

- **Subscription to your bulk emails.** The [*Do not use email*] checkbox must be cleared on the contact page. Contacts who have the [*Do not use email*] checkbox selected will not receive further marketing emails.
- **Email address relevance.** The [*Current*] checkbox must be selected for the email addresses used for contacts in the email. The address is considered to be invalid if a “Soft Bounce” or “Hard Bounce” response is received. The email will be sent to those contacts who have neither a “Soft Bounce” response nor a “Hard Bounce” response. These contacts will have the “Canceled (invalid email)” response.
- **Email address availability**. The system checks whether the [*Email*] field is filled in on the contact page. Creatio will not send any emails to the contacts who have no email address in their profile. In this case, the “Canceled (email not provided)” response will be set in the [*Response*] column on the [*Audience*] tab.
- **Email address correctness**. An email will be considered “incorrect” if it does not correspond to the email address format (for example, does not contain the “@” character). Creatio will not send any emails to the contacts who have incorrect email address in their profile. In this case, the “Canceled (incorrect email)” response will be set in the [*Response*] column on the [*Audience*] tab.

Check trigger email sending status

PRODUCTS: MARKETING

After a marketing campaign with a trigger email starts, it will add contacts to the audiences from time to time. Each contact who is added to the audiences will be sent a trigger email shortly after they are added to the audiences.

The trigger emails are sent according to settings of the corresponding marketing campaign whenever it adds new recipients to the trigger email audiences.

- The audience of an **event-based** trigger email is populated automatically (e.g. when a visitor fills out a landing page form on your website). Each new contact in the audience warrants sending a new trigger email immediately.

- If you set a trigger email to send **periodically during the day**, it will be sent in specific intervals to all new contacts in the audiences on the moment of sending the email. The trigger email starts when the corresponding campaign launches. For example, if the time interval is set to “30 minutes” and the campaign started at 13:07, the trigger email will be sent at 13:37, 14:07, etc.
- If you set a trigger email to send **at a specified time**, it will be sent once a day to those contacts who are included in the email audience at the time of sending. For example, in the campaign you can specify that the sending starts at 12:00 p.m. You can set the email to start three days after a customer orders the trial version of your product (this is done through native campaign settings). As a result, the trigger emails will be sent daily, at 12:00 p.m. to those contacts who populated the landing page starting from 12:00 p.m.

After the trigger email starts, the information on the [*Template*] tab becomes non-editable. Also, it is not possible to edit the owner and the connected campaign or to run a split test.

You can view a specific contact response to an email on the **contact page**: the **History** tab → the **Email - Bulk emails** detail → the **Response** column. Learn more: Personal responses.

Trigger email sending progress

The sending progress can be analyzed on the **Email totals tab**. Here you can view the latest updates about email deliveries and recipient responses and analyze open and click dynamics.

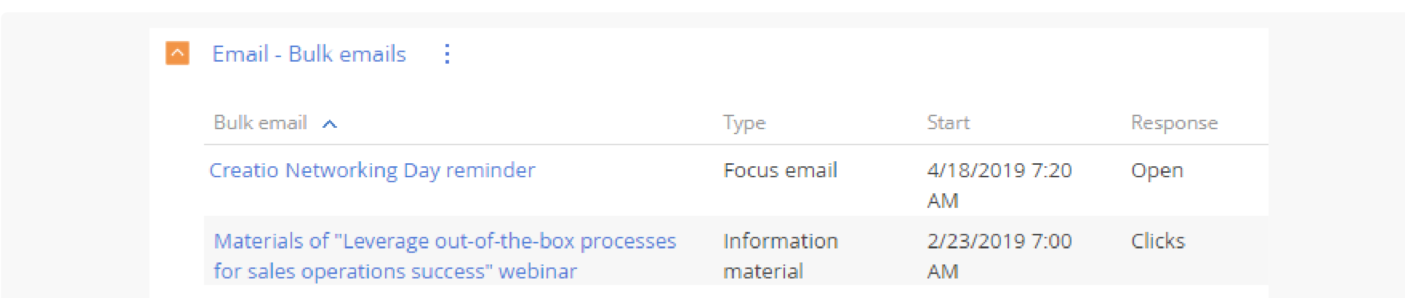
The following information is available on the [*Sending progress*] tab of a trigger email:

- **Date and time** of starting and finishing the last sending.
- **Duration** of sending, if the email is in the “Completed” status.

View a contact’s response

You can view a specific contact response to an email on the **contact page**: the **History** tab → the **Email - Bulk emails** detail → the **Response** column (Fig. 1). The [*Email - Bulk emails*] detail records contact’s responses to bulk and trigger emails. You can also view the marketing email responses on the bulk email page. Learn more: Personal responses.

Fig. 1 Email responses of a specific contact



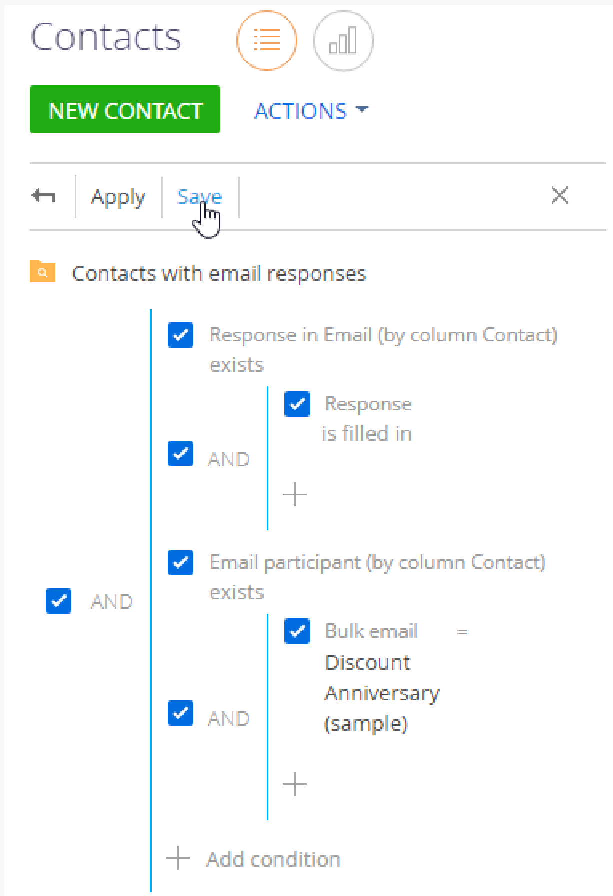
We recommend displaying the [*Category*] column in the detail list. The column will specify the email category: bulk or trigger. You can set up an advanced filter or a dynamic folder in the [*Contacts*] section through the **Email response (by column Contact)** column. By selecting a folder in the filter block of the [*Contacts*] section, you will obtain a list of contacts who have email responses.

Note. The number of days during which the final response is recorded for each contact is indicated in the "Time period (days) to update email statistics" ("MailingStatisticUpdatePeriod" code) system setting. After the specified time, the responses on the contact's page, as well as on the [*Audience*] tab of the email page will not change.

To set up a dynamic folder:

1. Go to the [*Contacts*] section and add a new dynamic folder. Enter the folder name, for example, "Contacts with email responses".
2. Set up the following filter conditions (Fig. 2):

Fig. 2 The filter conditions



3. Click the [*Save*] button.

   The [*Audience*] tab of the email page displays participant responses to marketing emails.