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The Direct Mail Platform

# Triggered campaigns

This step by step tutorial will walk you through the process of creating a triggered campaign.

## What is a triggered campaign?

A triggered campaign is only sent out when the specific requirements set by the user are met, (hence triggered) and will not send to the whole database it is attached to unless each recipient meets those requirements, it will also keep an eye on the database and continue sending out mail pieces whenever new recipients in the database match the criteria.

In this tutorial I'll explain two types of triggers:

- **When recipient joins group** (most common trigger)
  - o Whenever a recipient joins the group the triggered campaign is attached to, it will send the mailpiece to them (but not the existing recipients)
- **4 days Before Date trigger** (number of days set by user)
  - o 4 days before a specific date the recipient will be sent a mailpiece, e.g. Birthday, MOT date, Renewal date etc. (this date should be in its own column in the data)

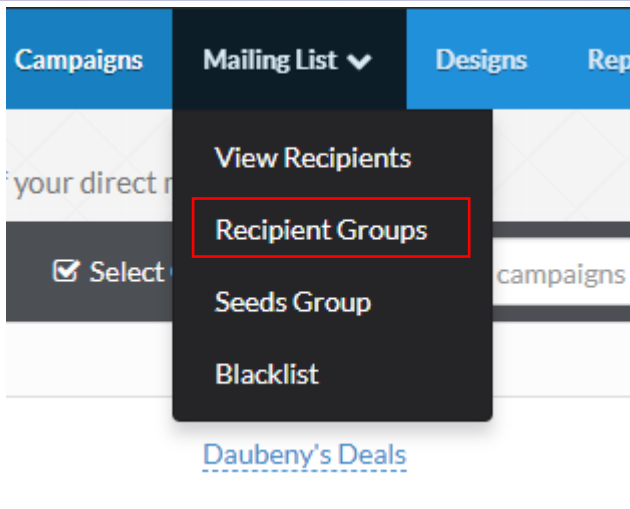
For more advanced triggers and help with them please do not hesitate to contact the Stannp Tech Team.

Ok. So lets begin

## Step 1 – Setting up the Campaign and Recipient Group

*Note: This tutorial will not show you how to create a creative for the campaign, as we're sure you already know how to do that if you're researching triggered campaigns.*

First, head to the **Recipient groups** screen by clicking the link in the mailing list dropdown:



Now either you'll need to upload your data from here or create an empty group to add data to at a later date.

To create an empty group, click the create new group dropdown and select '**Create a new empty group**'

A new group will appear at the top of your recipient groups list, it will be names something basic such as '**Group 14**' etc.

<input type="checkbox"/> All	ID	Group Name	Created	Total Recipients	UK
<input type="checkbox"/>	26955	<a href="#">Group 14</a>	Just created	0	0

Click the name of the group to change the group name to something more useful

<input type="checkbox"/> All	ID	Group Name	Created	Total Recipients
<input type="checkbox"/>	26955	<a href="#">Triggered Campaign Test Data</a>	Just created	0

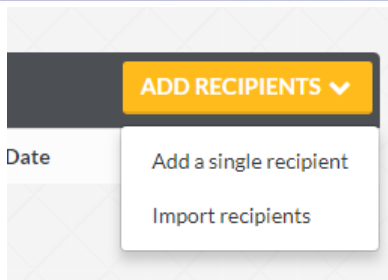
If you don't have a seed address, you'll need to add a single recipient to the data in order to see a sample of your triggered campaign.

For now we'll assume you don't have seed addresses set up. View the group and click **Add Recipients**.



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Click '**Add a single recipient**' in the dropdown

A new entry will be added, now fill in the details so that it will be sent to you.

Next, click the manage columns dropdown and create a new column called 'trigger\_date' and select date from the format dropdown.

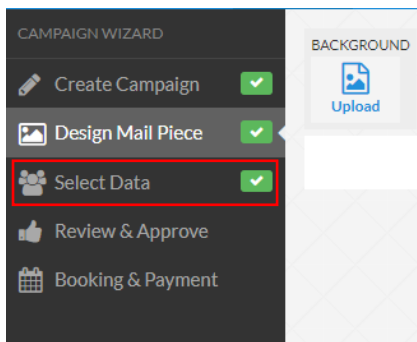
## Manage your data fields

trigger_date	Date	ADD COLUMN
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Now add a date into that column for yourself (you should be the top entry when the screen refreshes).

Now head over to the campaigns screen and set up your creative in the format of your choosing if you haven't already.

Once you've completed your design click on the 'Select Data' tab on the left:



Now select the triggered data group from the list of available recipient groups

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Select a data group

Group Name	Recipients	UK PAF Matched	UK Not Matched	International	Health Check
Triggered Campaign Test Data	1	1	0	0	

You'll be taken to a new screen showing filters, limits and triggers, as well as breakdown of the recipients in the group you selected.

1. To create a triggered campaign that sends out to all new recipients that you add to the group, click into the **'Select Trigger date'** section and choose the **'When recipient joins the group'** from the dropdown.

Select a trigger date ▼

Choose a date field:

When recipient joins the group ▼

Date offset:

0

days after the "join\_date" value ▼

2. To create a triggered campaign that sends out a letter based on a custom field (in this case, 'trigger\_date') select the name of the custom field from the dropdown box, you can also set an offset by adding numbers and selecting whether the offset is before or after the date value – *note: the custom field must have been mapped as a date field for it to appear on this list.*

Select a trigger date ▼

Choose a date field:

trigger\_date ▼

Date offset:

4

days before the "trigger\_date" value ▼

When you've set your trigger up, click 'Next' at the bottom right of the screen.

You'll now be taken to the review and approve screen, where you should see a sample of your mailpiece, you'll notice that in the top section there are two fields explaining the trigger used for the campaign:





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## Daubeny's Deals

Format	A6-POSTCARD
Recipient Group	Triggered Campaign Test Data
Triggered by	join_date
Trigger offset	0 days after the join_date value

Once you approve the sample instead of a booking screen you are presented with an activate campaign screen:

This is a triggered based campaign. Would you like to activate it?

After activating this campaign each time a mail piece is triggered a charge will be taken from your balance.

ACTIVATE THIS CAMPAIGN

Clicking this button will activate the campaign and will start watching your recipient group ready to send letters when either a recipient joins or their trigger\_date is 4 days away (depending on what you set up)

## Congratulations!

## You've created your first triggered campaign!

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