

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 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 will explain two types of triggers:

- **When recipient joins the group** (*most common trigger*)
 - Whenever a recipient joins the group, the triggered campaign is attached to, it will send the mailpiece to them (but not the existing recipients)
- **7 days Before Date trigger** (*number of days set by user*)
 - 7 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)

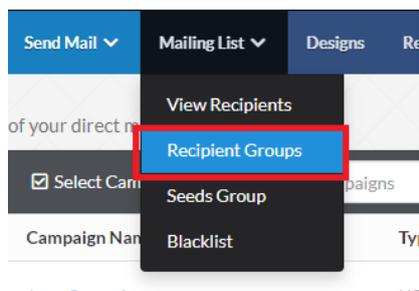
For more advanced triggers and help with them please do not hesitate to contact the Stannp Team.

Ok, so let's begin.

Step 1 – Setting up the Recipient Group.

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

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



Now either you will 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'.

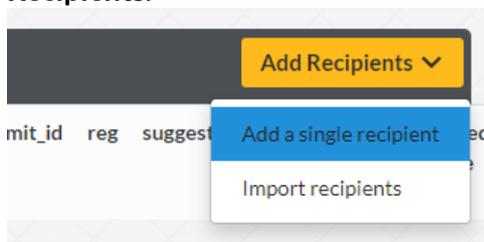
ID	Group Name	Status	Created	Total Recipients	Verified	
98171	☆ Group 14		09/06/2021 12:41	0	0	(

Click the name of the group to change the group name to something more memorable:

98171	☆ Triggered Campaign Test Data		09/06/2021 12:41	0	0	
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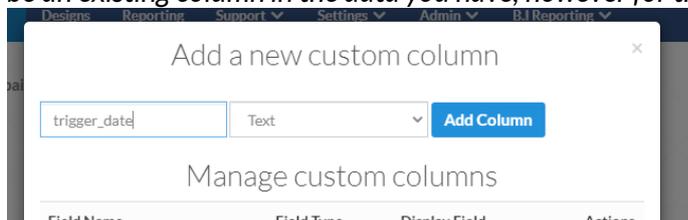
If you do not have a seed address, you will need to add a single recipient to the data in order to see a sample of your triggered campaign.

For now, we will assume you do not have seed addresses set up. View the group and click **Add Recipients**.



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. *Note: The column does not need to be called this, and it can be an existing column in the data you have, however for this example we will be calling it **trigger_date**.*

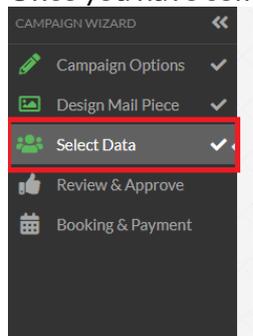


Now add a date into that column for yourself (you should be the top entry when the screen refreshes).

Step 2 – Setting up the Campaign.

Now head over to the **Bulk Campaigns** screen and set up your creative in the format of your choosing if you have not already (this tutorial will not cover the standard setup of campaigns, for more information on that please check out the [QuickStart Guide.](#))

Once you have 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.

As you would have seen before in the QuickStart Guide tutorial, the information on the selected data is displayed. What we are interested in here is the **Select trigger date** section.

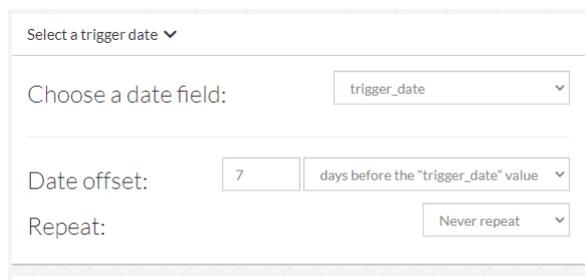
Let's create our first trigger!

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.



A screenshot of the 'Select Trigger date' configuration form. It contains three sections: 'Choose a date field:' with a dropdown menu set to 'When recipient joins the group'; 'Date offset:' with a text input '0' and a dropdown menu 'days after the "join_date" value'; and 'Repeat:' with a dropdown menu 'Never repeat'.

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, we are going to set this to 7 days before the date as explained above.



A screenshot of the 'Select Trigger date' configuration form. It contains three sections: 'Choose a date field:' with a dropdown menu set to 'trigger_date'; 'Date offset:' with a text input '7' and a dropdown menu 'days before the "trigger_date" value'; and 'Repeat:' with a dropdown menu 'Never repeat'.

You can also set it to repeat once a year by choosing **Repeat Annually** from the **Repeat** dropdown.

– Note: the custom field must have been mapped as a date field for it to appear on this list.

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

Step 3 - Reviewing the Samples and Activating the Trigger

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

Please review your campaign and approve

Scabby Joes Bar-B-Q - 06/09/2021	
Format	6X9-POSTCARD
Recipient Group	Scabby Joe's Bar-B-Q - 06/09/2021
Triggered By	trigger_date
Trigger Offset	7 days before the trigger_date value



Change design

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 the **Activate This Campaign** button will activate the campaign and will start watching your recipient group ready to send letters when their **trigger_date** is 7 days away (or when they join the group depending on what options you chose earlier)

When the letter is sent it will charge straight to your account balance, if there is no money in your account when the trigger goes off it will not be sent! So, to avoid potential issues, it is a good idea to make sure to keep your balance topped up with enough money to send them out.

Congratulations!

You have created your first triggered campaign!