



Trigger Manager 7.0 User's Guide

Wednesday, October 07, 2009

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Introducing Trigger Manager

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About Trigger Manager

e-Dialog Trigger Manager™ helps you manage the organization of Insight Trigger mailings.

Insight Trigger mailings automatically send e-mail to a dynamically generated audience list on a user-defined schedule. The audience list is created by executing an Insight Builder query that can be based on *any data available to Insight Builder*, including audiences, campaign results, and profiles.

For example, you can send:

- ◆ A welcome message immediately after a customer registers on your site
- ◆ A special offer when a customer abandons a shopping cart on your site
- ◆ A promotional message on a specific day followed by the same message three days later to anyone having opened (or not opened) the first message, and another four days later
- ◆ A sequence of messages that varies in content according to accumulated data from previous messages

To avoid sending the same triggered message to the same e-mail address multiple times, you define an **Insight Trigger Bucket** in Insight Builder. You use the data collected in that bucket in the query that generates the dynamic audience list. The Trigger Bucket is a cumulative record of all the e-mail addresses that have received a particular triggered message over the life of the mailing. The Trigger Bucket records the results of all previous executions of the triggered cell in optional *rollover ranges* based on specific days or ranges of consecutive days relative to the current date.

Customization for Your Organization

e-Dialog configures Precision Central applications to meet your organization's specific preferences. Also, to accommodate the different access needs of individual users, e-Dialog sets up individual profiles based on user name. Your Professional Services Account Team helps to configure these preferences during your initial set-up process.

For example, your organization may want to provide certain employees with the ability to upload new audiences and assign these audiences to new users. On the other hand, others may only have the ability to upload a new audience solely for their own use. Or, some employees may not be able to send final e-mails, while others are allowed to do so.

Note: As a result of the modular approach, some of the functionality described in this document may not apply to you.

System Requirements

Precision Central 7.0 requires:

- ◆ Microsoft Windows or Apple Macintosh OS X*
- ◆ Adobe Flash Player 9.0.28 or newer
Adobe Flash Player is required only for Insight Builder, User Management, Precision Dashboard and Data Director.
- ◆ One of the following Web browsers:
 - § **Internet Explorer 7** (<http://www.microsoft.com/downloads/>) on Windows
 - § **Firefox 3** (<http://www.mozilla.com/en-US/firefox/>) on Windows and Macintosh OS X*

* The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Starting Trigger Manager

To start Trigger Manager:

- 1 Log in to Precision Central.
- 2 Select **Utilities > Trigger Manager**.

See Setting Your Default Application in Introducing Precision Central 7.0 for instructions on specifying which application appears when you log in to Precision Central.

Configuration Process Overview

The basic Insight Trigger configuration process consists of the following steps:

1.	Create a Trigger Bucket.	- a Open Trigger Manager. - b Create a Trigger Bucket. See <i>Creating a Trigger Bucket</i> (on page 13) for a detailed description. The trigger bucket appears in the Insight Builder New Query tab Actions button.
2.	Create a query in Insight Builder.	- a Open Insight Builder. - b Create a query as described in <i>Creating an Insight Builder Query</i> (on page 21). You can postpone this step until you reach the <i>Insight Audience</i> (on page 18) step in <i>Creating a Triggered Cell</i> (on page 17).
3.	Create an Insight Trigger Mailing.	- a Open Campaign Builder. - b Create an Insight Trigger mailing. See <i>Creating an Insight Trigger Mailing</i> (on page 17) for a detailed description. - c Create an Insight Trigger cell within the new mailing. See <i>Creating a Triggered Cell</i> (on page 17)

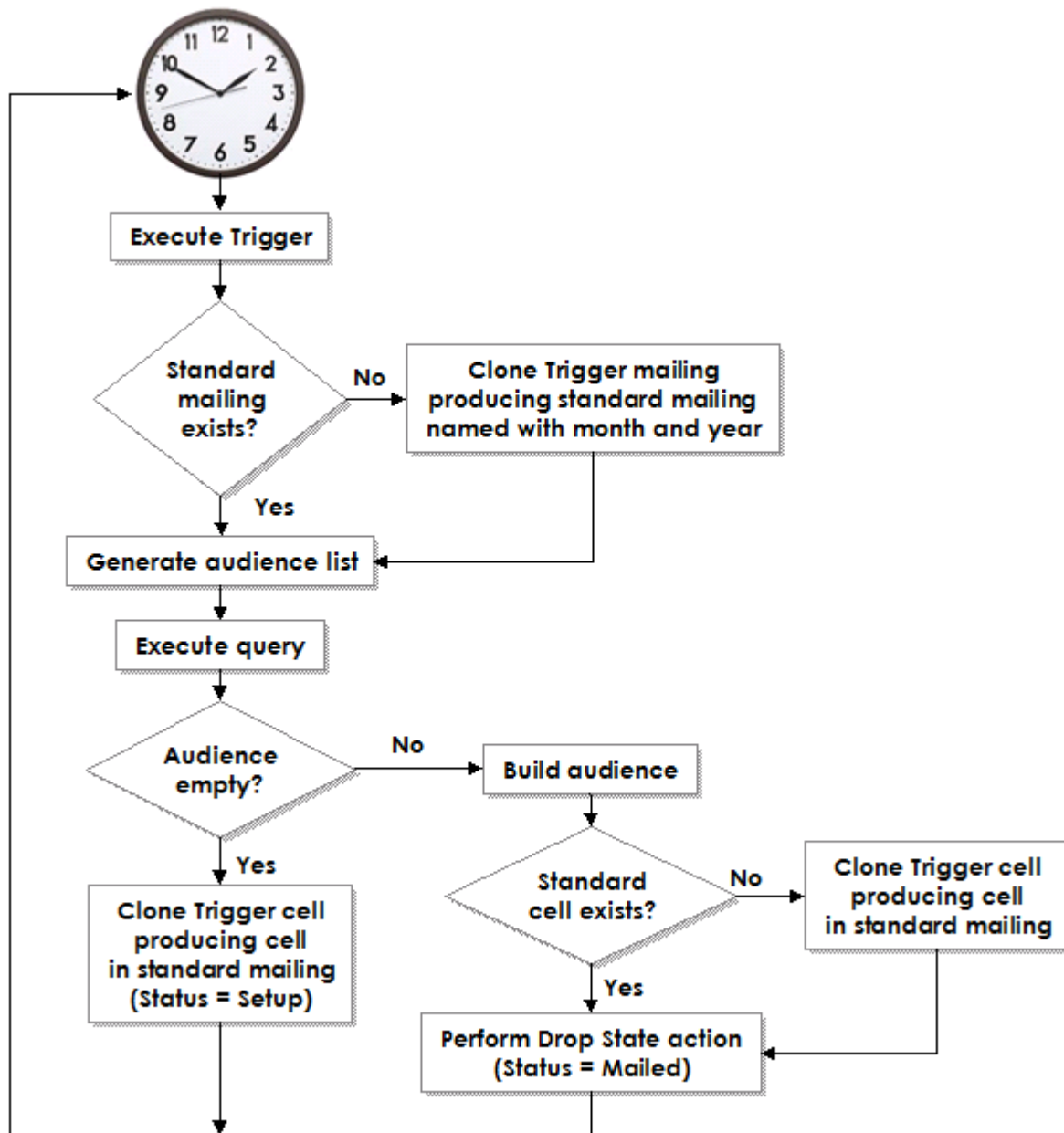
		for a detailed description.
--	--	-----------------------------

You can use multiple queries and multiple mailings to create more sophisticated Insight Triggers.

Trigger Mechanism Overview

An Insight Trigger mailing contains a triggered cell that is very similar to a standard cell *except* that the triggered cell itself is never executed. Instead, the triggered cell provides a template for a series of cloned standard cells, which are executed (unless the audience list is empty).

Every 24 hours (on specified week days and time of day)



Notes

- ◆ The trigger mechanism is based on a 24-hour clock. It checks the time continuously and executes triggers at their appointed times.
- ◆ When Campaign Builder 7.0 clones the triggered mailing to create a new standard mailing, it names the mailing by appending a hyphen followed by the month and two-digit year to the trigger mailing name
- ◆ When Campaign Builder 7.0 clones the triggered cell to create a new standard cell, it gives the new cell the same name as the triggered cell. Thus, consecutive empty audience results can produce a long list of identically-named cloned cells beneath the triggered cell.
- ◆ The Drop State action performed is the one specified in the Insight Trigger cell:
 - § Mail
 - § Mail with Lproof
 - § Lproof
 - § Setup

See ***Execute Trigger*** (on page 20) for more information about drop states

Every 24 hours at 1:00 a.m. Eastern Time, Insight Builder updates the rollover range counts in all Trigger Buckets. Thus, multiple Insight Triggers that query the same Trigger Bucket within the same Insight Builder 24-hour cycle get the same range counts.

Every month Campaign Builder automatically:

- 1 Clones the Insight Trigger mailing, producing a standard mailing
- 2 Names the clone by appending the month and year to the original name
- 3 Transfers automatic execution to the new mailing

Using Trigger Manager

Trigger Manager allows you to search for existing Trigger Buckets and to create new ones.

Finding an Insight Trigger

To find a specific Insight Trigger, fill in one or more fields in the **Filter By** area and click **Search**.

Trigger List
Insight Trigger Manager

Search

From: Mar 2 2009

To: Apr 2 2009

Drop Days:
☒ Sunday
☒ Monday
☒ Tuesday
☒ Wednesday
☒ Thursday
☒ Friday
☒ Saturday

Trigger Name:

Mailing Name:

Cell Name:

Cell ID:

Status:
Active

Search

Trigger Buckets

Trigger Bucket	Campaign	Mailing	Cell	Start Date	End Date	Drop Days
Abandoned Cart	DTS Perm Campaign 03.17.2008	Insight Trigger Test Mailing 1	Test Insight Trigger for Stuck Jobs	06/09/2008	08/06/2009	M,Tu,W,Th,F
Gold Peak	Art's campaign	test triggers	Cell Name	10/06/2008	12/31/2030	Su,M,Tu,W,Th,F,Sa

Field	Description
Trigger Active Date ♦ From ♦ To	These date fields specify the beginning and end of the range of days that include the Last Run Dates of the triggers you want to find.
Trigger Name	Specify all or part of a name of the trigger to find. For example, specify "trigger" to find This_ Trigger and trigger_A .
Mailing Name	Specify the name of the Campaign Builder mailing to narrow the search to that mailing.
Cell Name	Specify the name of the trigger cell to find or a substring. For example, specify "trigger" to find This_Trigger and Trigger_A.
Cell ID	Specify the cell ID.

- 11 -

Drop Days	Click the check boxes to find triggers that have at least one Drop Day within the specified set of days. For example, to find triggers whose Drop Days include Wednesday or Thursday, select only those days. To find triggers whose Last Run Date occurs only on weekdays, deselect Sunday and Saturday.
Status	Specify the status of the triggers to find. The status of a cell is specified in the cell's Execute Trigger (on page 20) tab.
Search	Executes the search and refreshes the result set.
Trigger Buckets	Creates a new trigger bucket as explained in Creating a Trigger Bucket (on page 13).

Editing Triggers and Getting eReports

On the right-hand side of the trigger result set, there are links for Edit and eReports.

Trigger Bucket	Campaign	Mailing	Cell	Start Date	End Date	Drop Days	Run Time	Status	State	Last Run Date	
Abandoned Cart	Campaign 03.17.2008	Insight Trigger Test 1	Test Insight Trigger	06/09/2008	08/06/2009	M,Tu,W,Th,F	10:00	Active	WIP		Edit eReports
Gold Peak	Art campaign	test triggers	Cell Name	10/06/2008	12/31/2030	Su,M,Tu,W,Th,F,Sa	17:00	Active	WIP	11/02/2008 17:09	Edit eReports
Auto	QA Auto Camp19263	QA MIT	QA D22 19263	02/17/2009	02/21/2009	Tu	15:00	Active	VALID	02/17/2009 15:09	Edit eReports

[Edit](#) | [eReports](#)

Editing a Trigger

To edit a trigger:

- 1 Go to the Trigger List.
- 2 Click **Edit** for the Insight Trigger cell you want to edit.

You can then modify the Insight Trigger cell in Campaign Builder. See **Creating a Triggered Cell** (on page 17) and the Create Cells within a Mailing section of the Campaign Builder 7.0 User's Guide for more information.

Getting eReports on a Trigger

To view reports about a Trigger in eReports:

- 1 Go to the Trigger List.
- 2 Click **eReports** for the Insight Trigger cell you want to report on.
eReports displays the Insight Trigger data.
Insight Trigger metrics are grouped by month in eReports.
- 3 Select a report type of **Mailing / Audience** to see the results for each trigger run.

See the Introducing eReports and related documentation for more information.

Creating an Insight Trigger

Creating a Trigger Bucket

An Insight Trigger Bucket provides an ongoing record within Insight Builder of the people that have received a particular triggered message. You can use the Trigger Bucket in any Insight Builder query for any purpose. For example, the triggered message can query the Trigger Bucket to avoid sending the same e-mail to the same recipients repeatedly, or it can send the same e-mail to certain recipients on a schedule.

To create an Insight Trigger Bucket

- 1 Log in to Precision Central.
- 2 Select **Utilities > Trigger Manager**.

The Trigger Manager allows you to search for existing Trigger Buckets and to create new ones. For more information about the Trigger Manager, see *Using the Trigger Manager* (on page 10).

- 3 Click **Trigger Buckets**.

Trigger List
Insight Trigger Manager

Search

From: Mar 2 2009

To: Apr 2 2009

Drop Days: ☒ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday

Trigger Name:

Mailing Name:

Cell Name:

Cell ID:

Status: Active

Search Trigger Buckets

Trigger Bucket	Campaign	Mailing	Cell	Start Date	End Date	Drop Days
Abandoned Cart	DTS Perm Campaign 03.17.2008	Insight Trigger Test Mailing 1	Test Insight Trigger for Stuck Jobs	06/09/2008	08/06/2009	M,Tu,W,Th,F
Gold Peak	Art's campaign	test triggers	Cell Name	10/06/2008	12/31/2030	Su,M,Tu,W,Th,F,Sa

- 4 Fill in the **Insight Trigger Bucket Details** dialog.

Insight Trigger Bucket Details

* required field

Name:*

Insight Trigger Rollover Range:*

Range Bucket	From	To
All	0	999

- 5 Click **Save**.

A confirmation screen appears reminding you that once this bucket is created it **cannot be removed** without contacting your Account Team.

Once you confirm that you want to save this Bucket, the Trigger Manager immediately creates a Profile and associated Buckets in Insight Builder.

New Trigger Buckets do not appear in the Trigger Manager list until they are linked to a triggered cell.

Insight Trigger Bucket Details

The following table lists the fields in the Insight Trigger Bucket Details dialog:

Field	Description
Name	The name of the Trigger Bucket that you want to appear in Insight Builder. A Trigger Bucket can be used by multiple Insight Triggers so name it accordingly.
Insight Trigger Rollover Range	The Rollover Range consists of a set of Range Buckets, that group recipients according to how long ago each recipient was sent a particular triggered message. When viewed in Insight Builder, these range buckets display only counts. However, when used in Insight Builder queries, these range buckets provide audience lists.
All	The default Range Bucket All logs all the recipients (unique e-mail addresses) to whom the triggered message was sent with the last 999 days (approximately two years and nine months). If the goal of your trigger is to simply prevent recipients from receiving the same message more than once, make sure to use the EXCLUDES ALL field in your query (in addition to an audience list): EXCLUDES All This query excludes all recipients to whom the message has been sent at

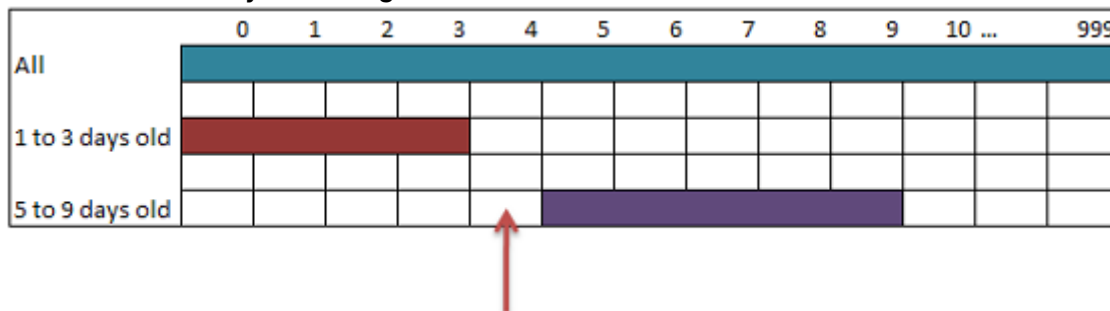
	any point in time.															
Range Bucket	Use a descriptive name for each Range Bucket. This is the description that appears in the Trigger Bucket itself and queries that use Range Buckets. If a Range Bucket will be used by more than one query, you can include all or part of the Trigger Bucket name in the Range Bucket name for readability purposes. See <i>Sequence of Messages</i> (on page 27) for an example of how this works. Note: Date intervals represented by rollover ranges are relative to the current date with respect to the execution of an Insight Builder query based on them. Thus, the set of recipients in each rollover range may change every day. In other words, a recipient record is always included in the All range (until its age exceeds 999 days) but moves from user-defined range to range as its age advances.															
From and To	These two fields define the number of consecutive days grouped in each Range Bucket. You can use any numeric value from 0 to 999 where zero represents less than one day (24 hours). For example, if you want your first bucket to group all recipients that were sent the triggered message in the previous 30 days, enter 0 in the From field and 30 in the To field. If you want the second bucket to contain the the recipients who were sent the triggered message more than 30 days ago, enter 31 in the From field and 999 in the To field. <table><tr><th>Range Bucket</th><th>From</th><th>To</th></tr><tr><td>All</td><td>0</td><td>999</td></tr><tr><td>0 to 30 days old</td><td>0</td><td>30</td></tr><tr><td>31 days and older</td><td>31</td><td>999</td></tr><tr><td></td><td></td><td></td></tr></table> Before any e-mail is sent, the resulting Insight Trigger bucket contains the following ranges, each with 0 recipients: ◆ All (0) ◆ 0 to 30 days old (0) ◆ 31 days and older (0) To prevent recipients from receiving the message more than once, use the following Insight Builder query for the trigger cell: EXCLUDES All	Range Bucket	From	To	All	0	999	0 to 30 days old	0	30	31 days and older	31	999			
Range Bucket	From	To														
All	0	999														
0 to 30 days old	0	30														
31 days and older	31	999														

Gaps Between Rollover Ranges

If a recipient falls into a gap between rollover ranges, it is included in **All** but not in any other range. For example:

Range Bucket	From	To
All	0	999
1 to 3 days old	0	3
5 to 9 days old	5	9

Recipients that are exactly four days old or greater than nine days old are included in the **All** range bucket but not in any other range buckets.

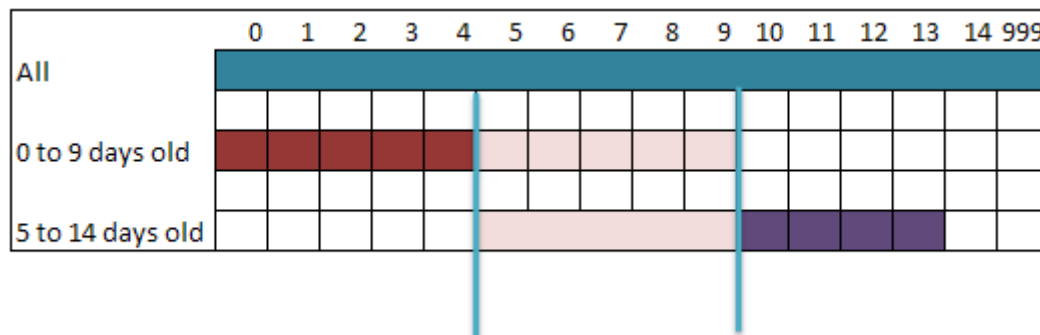


Overlapping Rollover Ranges

If a message is recorded in more than one rollover range, it is included only once in **All**. For example:

Range Bucket	From	To
All	0	999
0 to 9 days old	0	9
5 to 14 days old	5	14

Messages that are between five and nine days old are recorded in two user-defined range buckets but are included in the **All** range bucket only once.



Creating an Insight Trigger Mailing

- 1 Create a new mailing as described in [Creating a Mailing](#).
- 2 In the Mailing Type drop-down list select **Insight Trigger**.

Campaign List > Campaign: test for doc > Mailing:
Mailing: Mailing Id: 0

Mailing Setup

* required field

Mailing Name * Renew Trigger

Mailing Type * Insight-Trigger ▼

Description

The description will not appear in your mailings

Categories Team Newsletter~N

Mailing Type 3rd Party~3r

Save Clone Add A Cell Delete

Once the Insight Trigger mailing type is created, you can create triggered mail cells under it, just as you would a standard mail cell in Campaign Builder. Once you have created a triggered cell, you cannot change the Mailing Type back to Standard.

The mailing is automatically cloned each month, as described in *Trigger Mechanism Overview* (on page 9).

Creating a Triggered Cell

Once the Insight Trigger mailing is created, you can create triggered mail cells under it, just as you would a standard mail cell. On the Mailing: *mailing name* screen, click **Add A Cell** as described in the Creating a Cell section of the Campaign Builder 7.0 User's Guide.

During the cell creation process, three tabs are different in a triggered cell, as shown below.

Standard Cell Creation Tabs	Insight Trigger Cell Creation Tabs
Configuration	Configuration
Audience	Insight Audience
Content	Content
Links	Links
Symbols	Symbols
Export	Export
Proof	Proof
Execute	Execute Trigger

The remaining tabs (Content, Links, Symbols, Export, and Proof) are the same as those in a standard mail cell.

Configuration

The Basic Settings are the same as a normal cell except that there is no Scheduled Date. The Advanced Settings are the same.

Specifying the Insight Audience

The Insight Audience tab is different from the Audience tab in a standard cell. The sections that are different are highlighted in grey:

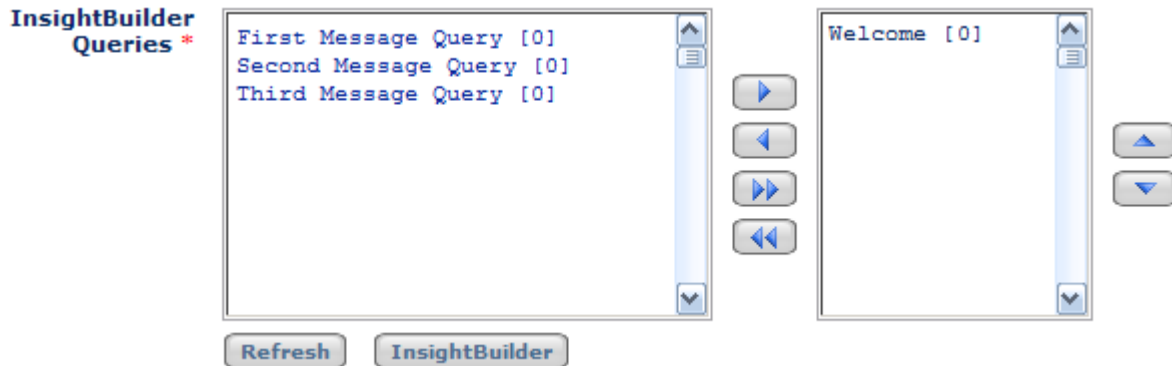
Standard Cell	Insight Trigger Cell
Audience	
	InsightBuilder Queries
	Lproof Audience
Suppression	Suppression
Suppress Wireless Domains	Suppress Wireless Domains
Deduping Criteria	
Unsub Suppression	Unsub Suppression
Undeliverable Suppression	Undeliverable Suppression

This section describes the sections that are different in a triggered cell. For descriptions of the other sections, see Define the Target Audience section of the Campaign Builder 7.0 User's Guide.

Specifying Insight Builder Queries

To build the audience dynamically:

- 1 Move one or more existing Insight Builder queries from the left-hand pane or click **Insight Builder** to open Insight Builder (as described in *Creating an Insight Builder Query* (on page 21)).



Each time the Trigger runs, it executes the selected queries and generates a new audience list, which determines who should receive the triggered message. If you select multiple queries for a single trigger, the generated audience list contains the union of the results of the queries.

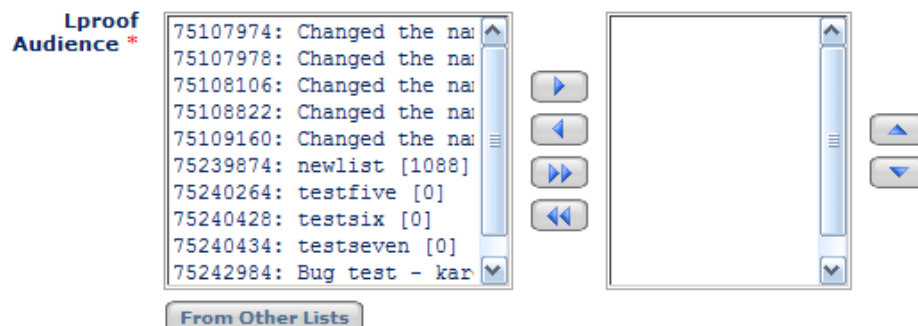
Note: Ensure that at least one query used by a triggered message includes an existing audience list, typically one associated with a data feed from your Web site, as in the following query:

Query Builder Window					
Field	Operation	Selected Field Values	Count		
Multi-Use Aud	Includes ▼	mail to e-dialog	60	✗	AND
Welcome	Excludes ▼	All	119	✗	

Specifying the Lproof Audience

To specify recipients of Lproofs:

- 1 Move one or more existing audience lists from the left-hand pane to the right-hand pane.



These are the same audience lists that appear in the Audience pane of a standard cell. They have two purposes:

- § Receive the cell for proofreading purposes when the trigger executes in the **Lproof** or **Mail with Lproof** drop state as specified in the *Execute Trigger* (on page 20) tab.

- § Provide a target audience to use when building a sample data file in the **Proof** tab (on page 20).

Note: The Lproof Audience does not receive the e-mail proofs sent from the Proof tab.

Proof

The Proof tab in a triggered cell has the same purpose as the Proof tab in a standard cell: to send live proofs (L Proofs) of an e-mail before sending the final version. The difference is that the data used to build the sample file comes from your selections in the Lproof Audience pane of the the **Insight Audience** (on page 18) tab. This is because the actual audience does not exist until the Insight Builder query executes for the first time.

Execute Trigger

The Execute Trigger Tab provides a way to configure the schedule for the trigger.

The screenshot shows the 'Execute Trigger' configuration window. At the top, it displays the campaign path: 'Campaign List > Campaign: QA_Auto_Camp19263 > Mailing: QA_MITr_19263 > Cell: QA_D22_19263'. Below this, it says 'Execute Trigger: Cell: QA_D22_19263 Cell Id: 1517950'. There are buttons for 'Save', 'Pause/Cancel', and 'Clone Cell'. The main area has tabs for 'Configuration', 'Insight Audience', 'Content', 'Links', 'Symbols', 'Export', 'Proof', and 'Execute Trigger'. The 'Execute Trigger' tab is active, showing the 'Trigger Configuration' section. A callout box highlights this section, which includes the following fields:

- Trigger Configuration**
- Trigger Bucket:** QA_Auto
- Start Date:** Feb 17, 2009 (US/Eastern)
- End Date:** Feb 21, 2009 (US/Eastern) with a 'Does Not Expire' checkbox.
- Drop Days:** Sunday, Monday, ☒ Tuesday, Wednesday, Thursday, Friday, Saturday.
- Run Time:** 3:00 PM (US/Eastern)
- Priority:** 1
- Drop State:** Mail
- Trigger Status:** Active

Field	Description
Trigger Bucket	Binds the triggered cell to a specific trigger bucket.
Start Date	Specifies the day you want the trigger to start executing.

End Date	Specifies the day you want the trigger to stop executing. You can check the Does Not Expire box to make the trigger continue indefinitely.
Drop Days	Specifies the days of the week during which the trigger should execute.
Run Time	Specifies the time of day to execute the trigger.
Priority	Provides a way to resolve conflicts that can occur when two or more triggers execute at the same time.
Drop State	Specifies the action to perform when the trigger executes an active cell: ◆ Setup ◆ Lproof ◆ Mail ◆ Mail with Lproof In Setup state, no e-mail is sent.
Trigger Status	Specifies the state of the cell with respect to execution. Only active cells send e-mail. ◆ Setup ◆ Active ◆ Inactive ◆ Pause

Creating an Insight Builder Query

An Insight Trigger can use any Insight Builder query and an Insight Builder query can be based on any data available within Insight Builder. However, for a query to make sense within the context of an Insight Trigger, it must be based on:

- ◆ One or more audience lists, typically including data feeds from Web sites
- ◆ One or more **Trigger Buckets** (on page 13)

To create an Insight Builder query:

- 1 Open Insight Builder.
- 2 Click the **Audiences** icon to open a list of existing audiences.
- 3 Choose **at least one target audience** field.
- 4 Click the **Actions** icon in Insight Builder to display a list of existing Trigger Buckets.
- 5 Choose **at least one Trigger Bucket** rollover range field.
- 6 Drag and drop your chosen target audience and Trigger Bucket fields into an **AND statement block**. See **Understanding Insight Builder Drop Zones** (on page 22) for information about drop zones and query logic.

- 7 A minimal Insight Trigger query must look something like the following example:

Query Builder Window					
Field	Operation	Selected Field Values	Count		
Multi-Use Aud	Includes ▼	mail to e-dialog	60	✖	AND
First Message	Excludes ▼	All	0	✖	

Note: Failure to include a target audience field and a trigger bucket field in the query can produce unexpected and undesirable results. For example, a query that contains an EXCLUDES ALL field with no target audience field creates a dynamic audience list that contains every e-mail address in the Master Database.

Understanding Insight Builder Drop Zones

When you drag a field to the Query Pane, you drag the count, as indicated in the area shaded red in the following figure:

The screenshot shows the 'Insight Builder > Create New Query' window. On the left, there are tabs for 'Campaign Results', 'Insight Triggers', 'Audiences', and 'Profiles'. The 'Audiences' tab is selected. The main area displays a list of audience segments with their counts. The 'Female' segment has a count of 1,095, which is highlighted in red. A red arrow points from this count to the 'Query Builder Window' at the bottom. The text 'Drag the count to the Query Builder Window' is written in purple. The Query Builder Window is currently empty. At the bottom of the window, there are buttons for 'Preview Data', 'Analyze Data', 'Build Audience', 'Save Query', and 'Clear All', along with a checkbox for 'Suppress Non-Mailable'.

You position the field in the Query Builder Window to specify the logical relationship between your initial criteria and any additional criteria.

Tip: When you drag a count to the Query Builder Window, the area highlighted in the following figure indicates the type of Boolean relationship (AND or OR) you are creating.

Query Builder Window				
Field	Operation	Selected Field Values	Count	
Region	Includes	US OR Canada	614	X
Gender	Includes	Female	1033	X

Specifying an AND relationship

An AND relationship indicates that both criteria must be true.

To specify an AND relationship:

- 1 Select a count from a different field from the existing criterion.

For example, if the existing field is Gender, select a count from Region.

Note: Unless a field allows multiple values, it does not make sense to specify an AND relationship between values of one field. For example, one cannot be both male and female; specifying gender equals male AND gender equals female yields an audience of 0. However, if one can select multiple teams as favorites, specifying favorite team equals Red Sox AND favorite team equals Cubs does not result in an audience of 0.

- 2 Drag the count to the area shaded in red in the following figure.

Query Builder Window				
Field	Operation	Selected Field Values	Count	
Gender	Includes	Female	1033	X
Subtotal:				

Specifying an OR relationship

An OR relationship indicates that either criterion must be true.

To specify an OR relationship between values of the same field:

- 1 Select a count from the same field as the existing criterion.

For example, if the existing field is Region, select another count from Region.

- 2 Drag the count to the area shaded in red in the following figure.

Query Builder Window				
Field	Operation	Selected Field Values	Count	
Gender	Includes	Female	1033	X
Subtotal:				

To specify an OR relationship between different fields:

- 1 Select a count from a field different from the existing field.

For example, if the existing field is Region, select a count from Gender.

- 2 Drag the count to the area shaded in red in the following figure.

Query Builder Window				
Field	Operation	Selected Field Values	Count	
Gender	Includes	Female	1033	X
Subtotal:				

Specifying multiple relationships

You can specify more complex relationships by creating statement blocks. Each block can specify multiple criteria. For example, you might want to find female customers from the U.S. or Canada, and male customers from Japan.

The first statement block finds all customers from the U.S. or Canada who are female.

The second statement block finds all customers who are from male from Japan.

The following illustrates the two statement blocks:

Field	Operation	Selected Field Values	Count		
Region	Includes	US OR Canada	614		And
Gender	Includes	Female	1033		
Subtotal:					
OR					
Region	Includes	Japan	140		And
Gender	Includes	Male	1415		

statement block 1

statement block 2

Insight Trigger Examples

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One-Time-Only Message

This is a simple example of how to avoid e-mailing the same recipient more than once when new recipients are being added to the audience on a regular basis. In other words, it is a one-time-only mailing. A typical use case for this type of trigger is a "Welcome" message for newly registered members. (Follow-up messages would come from a different triggered cell.)

- 1 Create the Trigger Bucket
 - a) Start Trigger Manager.
 - b) Create the following Insight Trigger bucket:

Insight Trigger Bucket Details			
* required field			
Name:*	Welcome		
Insight Trigger Rollover Range:*	Range Bucket	From	To
	All	0	999

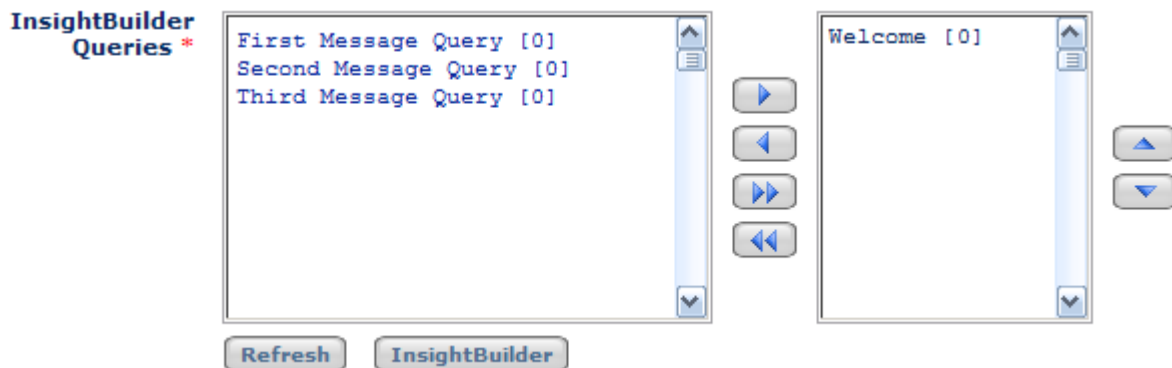
- 2 Create the Insight Builder query
 - a) Start Insight Builder.
 - b) Create the query.

You create the query for the message using an audience list and the **All** range. The **EXCLUDES** operator causes the first message to be sent immediately and prevents it from being sent more than once.

Query Builder Window					
Field	Operation	Selected Field Values	Count		
Multi-Use Aud	Includes ▾	mail to e-dialog	60	✖	AND
Welcome	Excludes ▾	All	119	✖	

3 Specify the Insight Audience

- Start Campaign Builder.
- Create or edit the cell.
- In the triggered cell's Insight Audience tab, select the **Welcome** query.



4 Execute the trigger

- In Campaign Builder, go to the Execute Trigger Tab
- Select **Welcome** as the Trigger Bucket.

Chronology

The following illustrates how the Insight Trigger bucket changes over the course of time:

Day	Status	Existing recipients	New recipients to whom e-mail is sent	Total recipients in Trigger Bucket
	Your Insight Trigger bucket contains only the All field and is initially empty	0		
0	The trigger runs; the query finds that 1000 recipients have signed up	1000	1000	1000

1	The trigger runs; the query finds that 300 new recipients have signed up	1000	300	1300
2	The trigger runs; the query finds 200 new recipients have signed up	1300	200	1500

The cycle continues until 999 days have passed or the triggered cell terminates when the End Date specified in the ***Execute Trigger tab*** (on page 20) is reached.

Sequence of Messages

This is an example of how to send a sequence of three messages consisting of three Insight Trigger cells.

- 1 The first message goes out whenever a new recipient is added to the audience list.
- 2 The second message goes out 30 days after the first message to any recipient who has not opened the first message.
- 3 The third message goes out 30 days after the second message to any recipient who has not opened the second message.

Each Insight Trigger cell:

- ◆ Has its own Trigger Bucket
- ◆ Uses a query that builds an audience based on the previous cell's Trigger Bucket
- ◆ Continues to execute until 999 days have passed or the End Date specified in the ***Execute Trigger Tab*** (on page 20) is reached

First Message

- 1 Create the Trigger Bucket
 - a) Start Trigger Manager.

- b) Create the following Insight Trigger bucket:

* required field

Insight Trigger Bucket Details

Name: *

Insight Trigger Rollover Range: *

Range Bucket	From	To
All	0	999
First Message 30+	30	999

A recipient moving into the **First Message 30+** range is the event that sends the second message.

2 Create the Insight Builder query

- Start Insight Builder.
- Create the query.

You create the query for the first message using only the **target audience** and the **All** range.

Query Builder Window

Field	Operation	Selected Field Values	Count		
Multi-Use Aud	Includes ▼	mail to e-dialog	60	X	AND
First Message	Excludes ▼	All	0	X	

- § The INCLUDES field is the initial target audience.
- § The EXCLUDES field prevents the message from being sent to a recipient more than once.

3 Specify the Insight Audience

- Start Campaign Builder.
- Create or edit the cell.
- In the triggered cell's Insight Audience tab, select the **First Message Query**.

InsightBuilder Queries *

Second Message Query [0]

Third Message Query [0]

Welcome [0]

First Message Query

4 Execute the trigger

In the Execute Trigger tab, select the **First Message** Trigger Bucket.

Second Message

1 Create the Trigger Bucket

a) Start Trigger Manager.

b) Create the following Insight Trigger bucket:

Insight Trigger Bucket Details * required field

Name: * Second Message

Insight Trigger Rollover Range: *

Range Bucket	From	To
All	0	999
Second Message 30+	30	999

Save

A recipient moving into the **2nd Message 30+** range is the event that sends the third message.

2 Create the Insight Builder query

a) Start Insight Builder.

b) Create the query.

The query for the Second Message is based on the **1st Message 30+** rollover range from the First Message trigger bucket.

The First Message query must execute once (creating Campaign Results) before you can create the Second Message query.

Query Builder Window

Field	Operation	Selected Field Values	Count		AND
First Message	Includes	First Message 30+	0		AND
Campaign Results	Excludes	Opened First Message	0		
Second Message	Excludes	All	0		

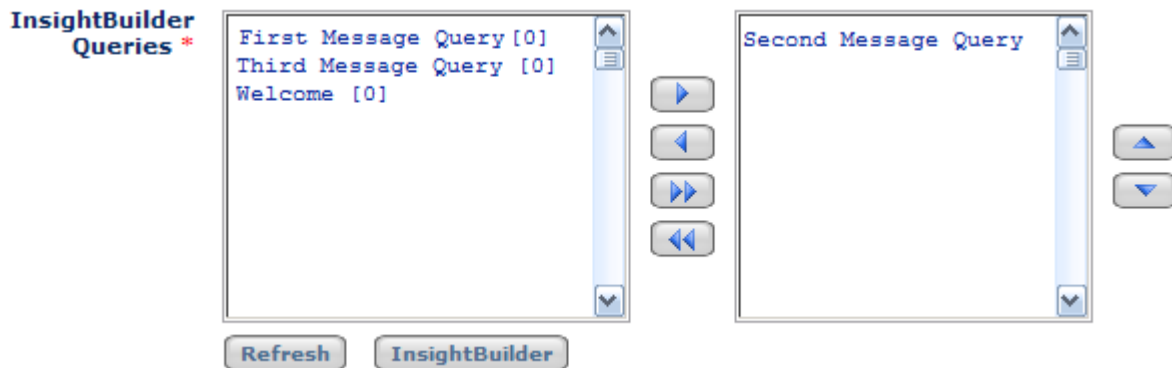
§ The INCLUDES operator causes the **second** message to be sent to recipients of the **first** message after 30 days have passed.

§ The first EXCLUDES operator prevents the message from being sent to recipients who opened the first message at any point in time.

§ The second EXCLUDES operator prevents the message from being sent to any recipient more than once.

3 Specify the Insight Audience

- a) Start Campaign Builder.
- b) Create or edit the cell.
- c) In the triggered cell's Insight Audience tab, select the **Second Message Query**.



4 Execute the trigger

In the cell Execute Trigger tab, select the **Second Message** Trigger Bucket.

Note: There will be nothing for this trigger cell to do until 30 days after the First Message is sent for the first time. Thus, you can schedule it to start 30 days later.

Third Message

1 Create the Trigger Bucket

- a) Start Trigger Manager.
- b) Create the following Insight Trigger bucket:

* required field

Insight Trigger Bucket Details

Name:*

Insight Trigger Rollover Range:*	Range Bucket	From	To
	All	0	999

This trigger bucket is identical to the trigger bucket used in the **One-Time-Only Message** (on page 25). No range buckets other than **All** are required because there is no fourth message to use them.

2 Create the Insight Builder query

- a) Start Insight Builder.
- b) Create the query.

The query for the Third Message is based on the **Second Message 30+** range from the Second Message trigger bucket.

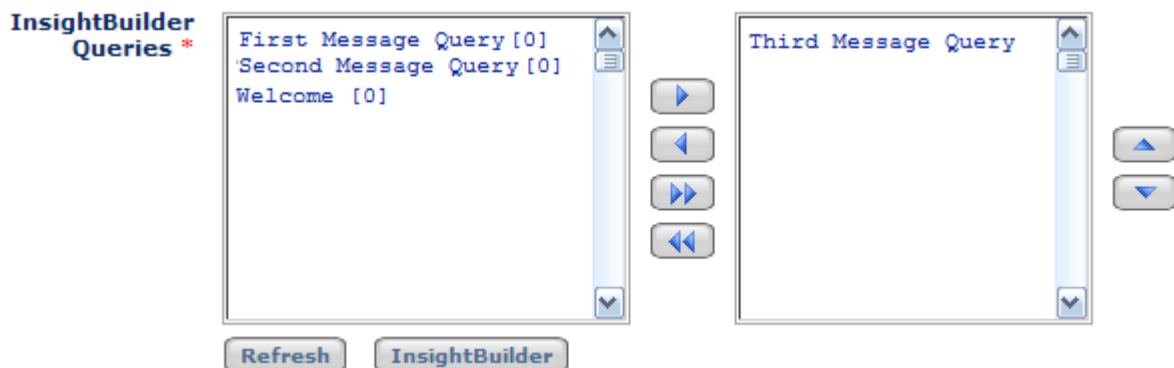
The Second Message query must execute once (creating Campaign Results) before you can create the Third Message query.

Query Builder Window					
Field	Operation	Selected Field Values	Count		
Second Message	Includes ▼	2nd Message 30+	0	✗	AND
Campaign Results	Excludes ▼	Opened 2nd Message	0	✗	
Third Message	Excludes ▼	All	0	✗	

- § The INCLUDES field causes the **third** message to be sent to recipients of the **second** message after 30 days have passed.
- § The first EXCLUDES field prevents the **third** message from being sent to recipients who **opened the second message**.
- § The second EXCLUDES field prevents the **third** message from being sent to any recipient more than once.

3 Specify the Insight Audience

- a) Start Campaign Builder.
- b) Create or edit the cell.
- c) In the triggered cell's Insight Audience tab, select the **Third Message Query**.



4 Execute the trigger

In the cell Execute Trigger tab, select the **Third Message** Trigger Bucket.

There will be nothing for this trigger cell to do until 30 days after the Second Message is sent for the first time. Thus, you can schedule it to start 30 days later.

Chronology

Chronology

The following illustrates how the Insight Trigger bucket changes over the course of time:

Trigger Manager 7.0 User's Guide

Day	Action	1st Message		2nd Message		3rd Message
		All	30+	All	30+	All
	All buckets are empty	0	0	0	0	0
0	1st Message Trigger runs	0	0	0	0	0
	1000 new recipients identified	0	0	0	0	0
	1000 added to 1st Message All Bucket	1000	0	0	0	0
	1st e-mail sent to 1000	1000	0	0	0	0
1	1st Message Trigger runs	0	0	0	0	0
	300 new recipients identified	1000	0	0	0	0
	300 added to 1st Message All Bucket	1300	0	0	0	0
	1st e-mail send to 300	1300	0	0	0	0
2-29	No new recipients are identified	1300	0	0	0	0
30	1st Message Trigger runs	1300 (1000)	0	0	0	0
	1000 move to 1st 30+ range	1300	1000	0	0	0
	2nd Message Trigger runs	1300	1000	0	0	0
	400 did not open 1st message	1300	1000 (400)	0	0	0
	400 added to 2nd Message All Bucket	1300	1000	400	0	0
	2nd e-mail sent to 400	1300	1000	400	0	0
31	1st Message Trigger runs	1300 (300)	1000	400	0	0

	300 move to 1st 30+ range	1300	1300	400	0	0
	2nd Message Trigger runs	1300	1300	400	0	0
	150 1st 30+ did not open 1st message	1300	1300 (150)	400	0	0
	150 added to 2nd Message All Bucket	1300	1300	550	0	0
	2nd e-mail sent to 150	1300	1300	550	0	0
32 - 59	No new recipients are identified.	1300	1300	550	0	0
60	1st Message Trigger runs (nothing happens).	1300	1300	550	0	0
	2nd Message Trigger runs.	1300	1300	550 (400)	0	0
	400 move into 2nd Message 30+ range.	1300	1300	550	400	0
	3rd Message Trigger runs.	1300	1300	550	400	0
	65 did not read 2nd e-mail	1300	1300	550	400 (65)	0
	65 added to Third Message All Bucket	1300	1300	550	400	65
	3rd e-mail send to 65	1300	1300	550	40	65

The cycle continues for each triggered cell until 999 days have passed or the cell terminates when the End Date specified in the **Execute Trigger tab** (on page 20) is reached.

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