Recommend – Triggered Emails – Functionality and Setup

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Recommend – Triggered Emails – Functionality and Setup

Triggered emails are personalised emails that are automatically generated and sent as a result of customer behaviours such as registering accounts, abandoning baskets, browse abandonment, etc. This type of email is seen as a way of making customers feel important and appreciated and is used to build a loyal and fruitful relationship between merchants and shoppers. With the help of Recommend you can easily set up triggered email campaigns to drive sales and increase revenue.

We have split our manual into three parts depending on the type of triggered email campaign.
Please use the following guides to learn how to set up these emails with the aid of the Recommend tool:

Abandoned Cart
Order Reminder
We miss you

"Abandoned Cart" Triggered Email Setup

Abandoned cart emails are usually sent out by online stores when a user leaves a website with items still in the shopping cart. The purpose of this email is to re-engage with customers and to encourage them to return to the site and complete their order.

Please see the list of steps to follow to setup your Abandoned Cart email campaign.

- **Click** on the **RECOMMENDATIONS** tab on the left-hand side navigation menu, as shown in the picture below:

- **Select** the **Win-back emails** section, then **click** on the **ADD NEW EMAIL TEMPLATE** button as shown below:

A new blank email template will open on the screen with the following fields for you to fill in:

1. **Subject.** Give your email a subject that relates to its purpose**.** The email is about shopping cart abandonment so include a subject line such as "Complete your order!", "Hey we've got your bag!", "Hey, did you forget something?"

2. **From.** This is the field which shows the email address of the email campaign's sender.

3. **BCC**. This is the field where you add the email address of the recipient. This field is mostly used for testing purposes or in case you want to monitor all the triggered emails sent to customers. This is generated as a separate email and the email address in the BCC field is not visible to recipients.

Please note: email addresses should be separated by comma in case you want to send emails to several addresses, as in the example below:

Bcc:

test@test.com, test@gmail.com

4. **Time interval.** This depends on the type of products your e-store is selling but we would recommend waiting around 30-45 mins after a customer has left your site, to send the Abandoned Cart email type. This type of email can be sent more than once and we advise that you send a follow-up email the next day, and one final email 7 days later. Each email should include a different theme so that they don't start to appear as spam. For example, the first could be to do with customer service - "we noticed that you have abandoned your cart, can we help you with anything?" The second could be to create urgency, and the third could be a discount email.

Win-back Emails

ADD NEW EMAIL TEMPLATE

Type	Time interval	Status	
Abandoned Cart	1h	Active	
Abandoned Cart	1d	Active	
Abandoned Cart	1w	Active	

5. **Send again after interval.** This field indicates the time period that will pass before another email of this type will be sent. E.g., Time Interval is set to be sent out in one hour and Send Again After Interval is set to 2 weeks. This means that the user who has left an abandoned cart will receive the email in 1 hour only once and after that this email will not be sent during 2 weeks. These time intervals were created to avoid spamming.

Time Interval:

1h

Example "1 week 1 days 2 hours 30 minutes" or "1w 1d 2h 30m" or "50:30"

Send Again After Interval:

2w

Example "1 week 1 days 2 hours 30 minutes" or "1w 1d 2h 30m" or "50:30"

6. **Email type.** Please select the Abandoned Cart email type from the drop-down menu as shown below:

Email Type:

Abandoned Cart

Abandoned Cart
Order Reminder
We miss you

7. **Status.** Select the status of your triggered email from the drop-down menu:

- **Inactive**. Select Inactive if you want to stop sending the triggered email.

- **Test**. Select the **Test** status if you want to test triggered emails before making them live.

Put the email address, that you want these test items to be delivered to, in the **BCC field**. Customers will not receive any emails, these will only be delivered to the email address(es) given in the BCC field.

- **Active**. This status should be chosen if you want to activate the feature and send emails to external customers.

8. **Markup.** This is the field which contains the body text of the email. This is to be used by developers as they code templates in HTML plus add some special tags which allow to insert recommendation panels. We have pre-written templates that can be used as body text or you can come up with your own ideas which we'll then convert into a triggered email.

- Click on the **SAVE** button to complete creation of a new triggered email. The message "Email template was successfully saved" will appear on the screen in case of success.

- ❖ To be able to **edit** a win-back email template click on an empty space on the template bar.
- ❖ To **delete** the template open it scroll to the bottom of the page and click the **DELETE** button. The message "Email template was successfully deleted" will appear on the screen in case of success

"Order Reminder" Email Setup

Order reminder is sent after a user has completed a purchase on a website. This may contain a thank-you message, shipping details, a request to rate the service provided or a message encouraging a follow-up purchase, as well as a discount on future purchases.

Please see the list of steps to follow to set up your Order Reminder email campaign.

- Please **click** on the **RECOMMENDATIONS** tab on the left-hand side navigation menu.

- **Select** the **Win-back emails** section, then **click** on the **ADD NEW EMAIL TEMPLATE** button as shown below:
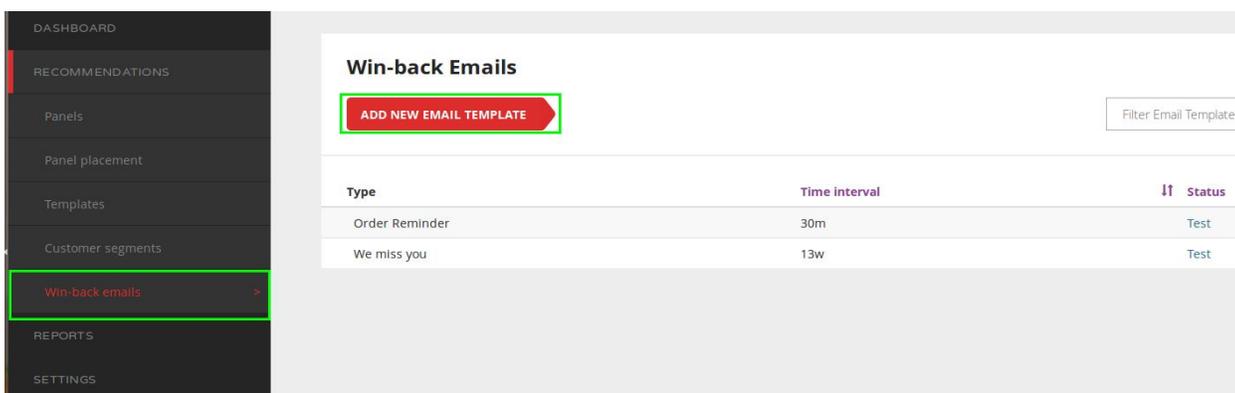
 A new blank email template will open on the screen with the following fields for you to fill in:

1. **Subject.** Give your email a subject that relates to its purpose**.** e.g., "Great News! Your Order is On Its Way", "Thanks for Shopping With Us", "10% Off Your Next Order".

2. **From.** This is the field which shows the email address of the email campaign's sender.

3. **BCC**. This is the field where you add the email address of the recipient. This field is mostly used for testing purposes or in case you want to monitor all the triggered emails sent to customers. This is generated as a separate email and the email address in the BCC field is not visible to recipients.

Please note: email addresses should be separated by comma in case you want to send emails to several addresses, as in the example below:

4. **Time interval.** The time interval depends on the message of your email. If you want to provide a customer with shipping details, you should send this information out after the order has been dispatched. If this is a 'thank-you for your order' email, then the email should be sent once a user has received the order. Length of the interval depends on the type of product you are selling. This can be sent more than once, e.g.,

you can send one email with the shipment details and the next in 2 weeks asking the customer to rate your services and then the third one may contain a thank-you message and a discount voucher.

5. **Send again after interval.** This field indicates the time period that will pass before another email of this type will be sent. E.g., Time Interval is set to be sent out to one hour. Send Again After Interval is set to 2 weeks. This means that the user who has left an abandoned cart will receive the email in 1 hour only once and after that this email will not be sent during 2 weeks. These time intervals were created to avoid spamming.

Time Interval:

1h

Example "1 week 1 days 2 hours 30 minutes" or "1w 1d 2h 30m" or "50:30"

Send Again After Interval:

2w

Example "1 week 1 days 2 hours 30 minutes" or "1w 1d 2h 30m" or "50:30"

6. **Email type.** Please select the Order Reminder type of email from the drop-down menu as shown below:

Email Type:

Order Reminder
Abandoned Cart
Order Reminder
We miss you

7. **Status.** Select the status of a triggered email from the drop-down menu:
   - **Inactive**. In case you want to stop using the feature.
   - **Test**. Select the **Test** status if you want to test the triggered emails feature before making it live.

Status:

Test
Inactive
Test
Active

Put the email address that you want these test items to be delivered to in the **BCC field**. Customers will not receive any emails, these will only be delivered to the email address(es) given in the BCC field.

   - **Active**. If you want to activate the feature to send emails to external customers.

8. **Markup**. This is the field which contains the body text of the email. This is to be used by developers as they code templates in HTML plus add some special tags which allow to insert recommendation panels. We have pre-written templates that can be used as body text or you can come up with your own ideas which we'll then convert into a triggered email.

   - Click on the **SAVE** button to complete creation of a new triggered email. The message "Email template was successfully saved" will appear on the screen in case of success.

   - ❖ To be able to **edit** a win-back email template click on an empty space on the template bar.
   - ❖ To **delete** the template open it scroll to the bottom of the page and click the **DELETE** button. The message "Email template was successfully deleted" will appear on the screen in case of success.

"We Miss You" Email Setup

We miss you email is sent out to to remind customers of products they have been looking at and to encourage them to come back to a website to complete a purchase.

Please see the list of steps to follow to set up your We miss you email campaign.

- Please **click** on the **RECOMMENDATIONS** tab on the left-hand side navigation menu.

- **Select** the **Win-back Emails** section then **click** on the **ADD NEW EMAIL TEMPLATE** button as shown below:
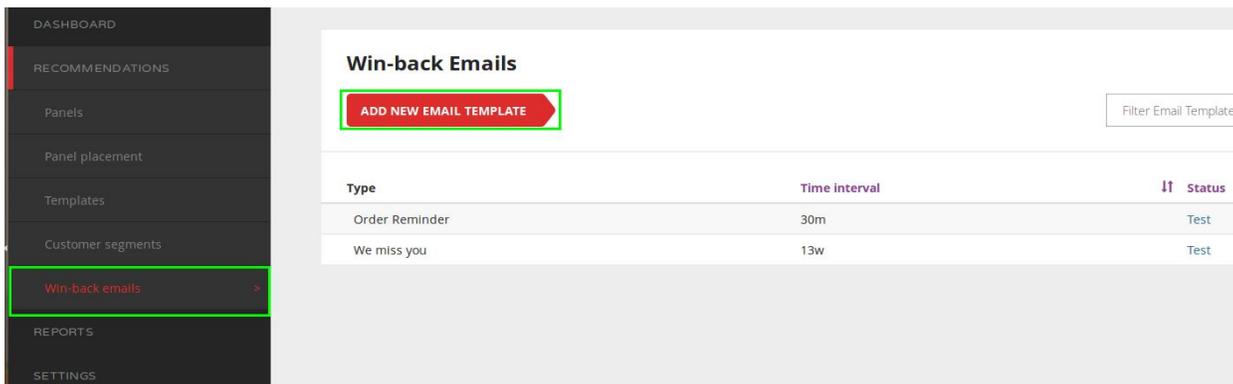
A new blank email template will open on the screen with the following fields for you to fill in:

1. **Subject.** Depending on the purpose of an email give it the subject related to the event the email is going to be about: e.g., "We Miss You!! Where'd You Go?", "£5 Off Just For You", "Don't Miss Out", "Where'd You Go?"

2. **From.** This is the field which shows the email address of the email campaign's sender.

3. **BCC**. This is the field where you add the email address of the recipient. This field is mostly used for testing purposes or in case you want to monitor all the triggered emails sent to customers. This is generated as a separate email and the email address in the BCC field is not visible to recipients.

Please note: email addresses should be separated by comma in case you want to send emails to several addresses, as in the example below:

4. Time interval. For the 'We miss you' email type, we recommend that you send the first email in a few hours after user leaves a website to remind of the products browsed and to entice a user to get back. The follow up email can be sent more than once but it's advisable to send it not more than twice as it is always important to keep the balance between showing care for the customer and being too intrusive. Bombarding customers with follow-up emails, will ensure the latter.

5. **Send again after interval.** This field indicates the time period that will pass before another email of this type will be sent. E.g. Time Interval is set to be sent out to one hour. Send Again After Interval is set to 2 weeks. This means that the user who has left an abandoned cart will receive the email in 1 hour only once and after that this email will not be sent during 2 weeks. These time intervals were created to avoid spamming.

6. **Email type.** Please select the We Miss You email type from the drop-down menu.

7. **Status.** Select the status of a triggered email from the drop-down menu:

- **Inactive**. If you want to stop using the feature.
- **Test**. Select the **Test** status if you want to test the triggered emails feature before making it live.

Put the email address that you want these test items to be delivered to in the **BCC field**. Customers will not receive any emails, these will only be delivered to the email address given in the BCC field.

- **Active**. If you want to activate the feature to send emails to external customers.

8. **Markup**. This is the field which contains the body text of the email. This is to be used by developers as they code templates in HTML plus add some special tags which allow to insert recommendation panels. We have pre-written templates that can be used as body text or you can come up with your own ideas which we'll then convert into a triggered email.

❖ Click on the **SAVE** button to complete creation of a new triggered email. The message "Email template was successfully saved" will appear on the screen in case of success.

❖ To be able to **edit** a win-back email template click on an empty space on the template bar.
❖ To **delete** the template open it scroll to the bottom of the page and click the **DELETE** button. The message "Email template was successfully deleted" will appear on the screen in case of success.

Email Performance

There is a special section on the Recommend website which displays the analytics for all email campaigns. This shows the number of emails sent, revenue earned through emails along with open rates and click rates.

To access this section, please do the following:

- Click on the **REPORTS** section in the left hand side navigation menu. Select the time period that you want to view the statistics for.

- Navigate to the section **EMAIL MARKETING** ─ click **Email Performance.** This will display the number of emails sent.
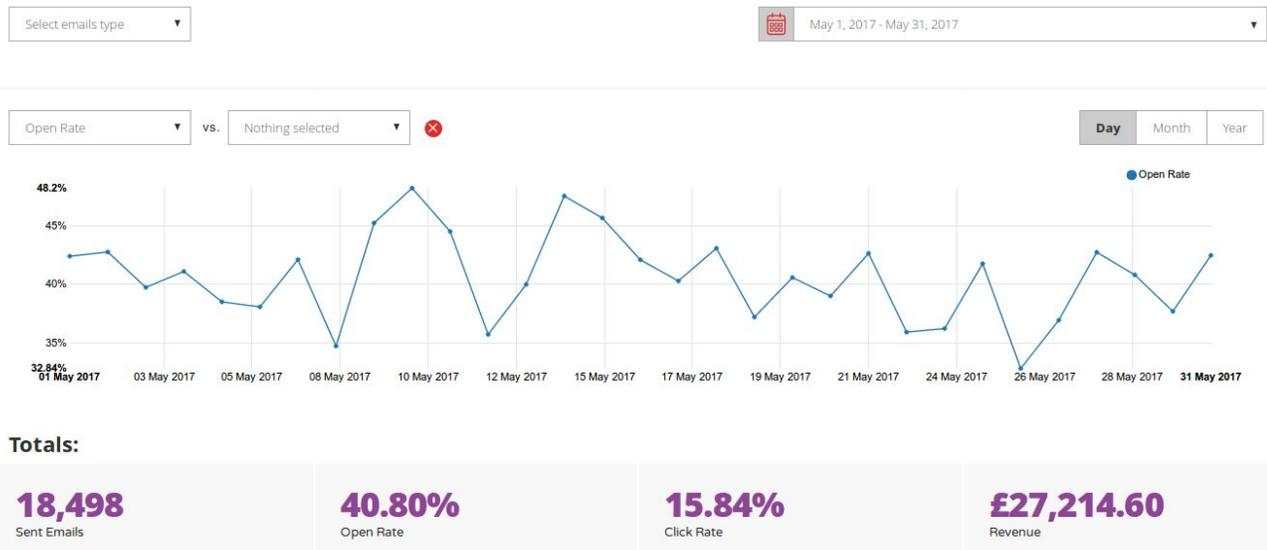
Click on the **Select emails type** box on the top of the page to see statistics for the particular triggered email type.

Please see how email performance statistics is calculated:

Sent Emails ─ total number of the emails sent.

Open Rate ─ the number of users who have opened the emails divided by the number of users whom these emails have been sent to.

Click Rate ─ the number of users who have clicked on products in the Recommend panels divided by the number of users who have received the emails.

Revenue ─ shows the revenue earned through these emails.

Abandoned Carts

This section displays the statistics for the abandoned cart emails over the particular period of time.

Abandonment Rate — this is the number of users who have entered the shopping cart divided on the total number of abandoned baskets left for the particular time range set in the calendar.

Abandonment Emails section shows the number of emails sent for each abandoned basket. Several emails can be sent for one basket but these are counted as one in statistics.

Conversion Rate is the number of completed orders divided by the number of sent emails during a certain period of time.

Revenue shows the revenue earned by clicking on the links in the abandonment cart emails.

Sent Mail

This section shows the email addresses of the customers that triggered emails have been sent to, the content of those triggered emails and their statuses, be it delivered, clicked, opened, failed or complained.

You can filter emails by email address - to do that please enter an email address to the **Filter Emails** box and press **Enter**.

Filter emails by status and see what emails have been delivered, failed etc. To do so please use the **Filter by status** drop-down menu.

Unsubscribe Customer Feature

It is possible to unsubscribe users using the Recommend Admin Panel. To do so please go to **Recommendations** - **Win-back emails** - click on the **Unsubscribe Customer** button and select desired email type and enter email address of a shopper, click **Save**.