

Etail Systems Tip Sheet

Objective: To create triggered emails that automatically send to customers after a certain event.

The following tells you how to achieve this;-

Triggered emails can be a great way of sending follow up emails to get repeat custom or to ask a customer for a review of a product they've purchased, for example. See below on how to set these up.

Promotion

Before you set up your triggered email settings, you'll need to set up a promotion - the information in the email comes from a Promotion. Triggered emails will only allow you to use [Articles](#), [Banners & Products](#) – if anything else is in the promotion, it won't appear in the email. We recommend styling your articles with HTML.

Banners

- If your banner(s) have a link on them in COMS, this will also work in the email.
- Each banner in your promotion will be on a separate line (e.g. so you can't have 4 small banners on one row).

Products

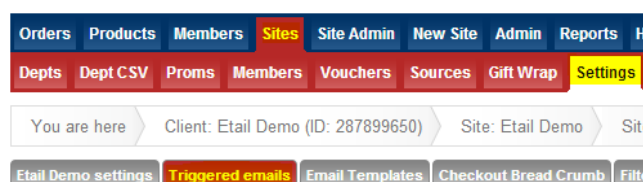
- If you include a product in your promotion, both the product image & product title will link to the product.

Triggered Email Settings




First, you'll need to check that a "Marketing email" is set up in COMS. Go to Sites > Settings for this, & put in the email address you wish your test versions of your triggered emails to be sent to. Click "Update" & this will save your changes.

Marketing email:	<input type="text" value="support@etailsystems.com"/>
Credit control email:	<input type="text" value="support@etailsystems.com"/>
Accounts email:	<input type="text" value="support@etailsystems.com"/>
Despatch note message:	<input type="text"/>
Number of recent products:	<input type="text" value="5"/>
Default class for new Members:	<input type="text" value="Select Membership class"/>
Christmas feature:	<input type="checkbox"/> Include current Christmas f
<input type="button" value="Update"/>	

You'll need to go to Sites > Settings > Triggered emails



You'll then see this page:

Type	ROC	Promotion	Voucher	Days	Status	Last update	Updated by	
Select type ▼	▼	Select Promotion ▼	Select Promotion code (Optional) ▼	▼				Add
Member_registration		Checkout offers ▼	Select Promotion code (Optional) ▼	5 ▼	Suspended	11/04/13 16:10	kim.ross	
Member_registration		Googlefonts Test ▼	£20 Gift offer ▼	8 ▼	New	11/04/13 16:10	kim.ross	 

Type

Firstly, you'll need to select your email Type. The options are as follows:

Basket Pending – this is when someone has added items to their basket but not amended the quantity of anything or added/taken anything away – rather like a pre-abandoned basket.

Member Registration – when a member registers (but hasn't bought anything).

Order Confirmation – when someone has placed an order & they've received their (automatic) order confirmation email.

Order Despatch – when someone's item has been despatched. (If someone has two items in their order but you despatched them at different times, two emails will be sent.)

ROC (Repeat order Count)

This is only applicable if you have Repeat Ordering set up. This lets you select the amount of repeat orders before the email is sent.

Voucher

This is an optional feature – if you want to send an email which has a voucher code in it e.g. to a member that has registered but not placed an order, this might encourage them to order from you. This can only be a [multi-use promotional code](#). Please ask if you need the vouchers walkthrough to know how to set up a voucher.

Days

This is the number of days after the event that you want the email to be sent out. The maximum number of days this can be is 90.

If you want to send one email at 10 days & one at 20 days, then you just set up two different emails.

NB: If someone acts on the "Basket pending" email at 10 days, then another one will NOT be sent out at 20 days if they have ordered. Any other emails do not have checks on them, so if one is set to go at 10 days, whether they act on it or not, the one at 20 days will still go out.

Status

Once all this is set up, click the 'Add' button. Your triggered email will automatically be set to New.

Unless a triggered email is set to 'Live', it will not send. If you want to make the email suspended, just click the 'Live' button. To set it live click again, click the green 'Suspended' button.



If you want to change the promotion the email uses, the voucher or the number of days, select the option you want in the dropdown & click the 'Update' button. If you want to delete a triggered email, click the red 'Remove' button.



You can also send a test email to yourself before setting the email to live – just click this icon:



Customisation

You can customise certain parts of your triggered emails – see below for the list:

- **Font family** – please make sure this is a web safe font. You should be able to search on a search engine to find out if your font is web safe. We recommend following the website. Please also state if it's "serif" or "sans-serif". If using multiple fonts, they will appear in the order they are in the box. You can separate your fonts with a comma e.g. "Arial, Helvetica, sans-serif"
- **Font size** – e.g. 12 px. You can just enter a number in the this box.
- **Font colour** – please use a hexadecimal font colour. See [here](#) for the hexadecimal colours. Please include the '#' symbol before your colour number.
- **Background colour** – please use a hexadecimal font colour. See [here](#) for the hexadecimal colours. Please include the '#' symbol before your colour number.
- **Border colour** - please use a hexadecimal font colour. See [here](#) for the hexadecimal colours. Please include the '#' symbol before your colour number.

Once you've entered all your information, click the "Update Styles" button.

NB: Please note, this is also the style sheet for your HTML emails (if you have these turned on). If you want to know more about HTML emails, please contact us.

Email Theme Styles		
Font family	<input type="text" value="Arial, Helvetica, sans-serif"/>	Font family style: 'Arial, Helvetica, sans-serif'
Font size	<input type="text" value="12"/> px	Base font size: 12px
Font colour	<input type="text" value="#000000"/>	Hexadecimal font colour: #00#00
Background colour	<input type="text" value="#ffffff"/>	Hexadecimal font colour: #00#00
Border colour	<input type="text" value="#cccccc"/>	Hexadecimal font colour: #00#00
<input type="button" value="Update Styles"/>		

Header & Footer Images

The system is set up so each email can have a header, footer & depending when applicable, signature image. The header image will automatically have a link to your website in it, but the footer will have no

link. There can be no other links on these graphics. If you send over the images you'd like for your header, footer & signature, please call them 'emailheader' & 'emailfooter' & 'emailsignature' – please ask for what type of file they need to be (although they're usually png). Alternatively, we can get some designed for you.

NB: If you don't want a header & footer on all of your emails, then you will have to add these as banners to each triggered email promotion you do want them on. This does also mean you won't have a header & footer on your HTML emails (if you have them turned on).

General Information

When are triggered email sent out?

Triggered emails are sent out overnight.

What type of emails are they?

HTML emails.

What are the dimensions?

600 px wide with a 10 px border = 580 px for the main panel & the graphic size.

Will they work on all devices?

It will render on a mobile device and HTML email clients.

Can I send a test email to see how it looks?

Yes, just click the 'Test Email' button & this will send an email to the Customer Services email address which is in COMS. This will work whether your Triggered Email is live, suspended or new.

Future Improvements

- Options to select how wide you want your email.
- Unique gift voucher codes for each email that is sent.
- The despatch email doesn't currently relate to a product, but it may be able to (e.g. if you're emailing asking for a review).

On the next page is a mock-up of how a standard triggered email may look:

ITP
IMPORTS

The UK's Cheapest Discount Wholesaler
3000 PRODUCTS AVAILABLE
FREE DELIVERY*
WWW.DISCOUNT-WHOLESALE.CO.UK

We noticed you have products in your basket

Do you need help in completing your order?

Press here to return to your basket and place your order today

Return to your basket

Our customer service team are on hand anytime between
9am to 5.30pm, Monday to Friday to answer any queries that you may have.

Call us now on 0845 557 7353

Alternatively you can email us at any time and we will respond within 48 hours.
customerservice@discount-wholesale.co.uk

We look forward to hearing from you!

ORDER TODAY

Online
Safe & Secure website
www.discount-wholesale.co.uk

Call
0845
5577353

Showroom
Open Mon - Fri
9am - 4pm
By appointment

Visit
Our Sales Manager
can come to you

JUST ARRIVED IN STOCK
TRAVEL ESSENTIALS
ACCESSORIES - HEALTHCARE - SUNGLASSES

blueskies
VELOUR
BEACH TOWEL

TRAVEL KIT

Alarm Clock
with light

COOL AIR
POCKET FAN

Thanks again from the Discount Wholesale Customer Services Team.
www.discountwholesale.co.uk

If you need any help with triggered emails, please call 0844 482 0908 or email support@etailsystems.com.