

# Lyris HQ Triggered Messaging

Thursday, February 12, 2015

ONE-2762

Lyris HQ - Canvas (HQ Integration)

## Change Log

Date	Page	Description
Sept 1, 2014	3	Initial Flow Diagram
Sept 12, 2014	Many	Started adding wireframes
Sept 15, 2014	Many	Several Updates
Sept 18, 2014	9 & 10	Added Nested Groups to queries
Sept 26, 2014	Many	General text edits
Sept 30, 2014	7, 9, 10, 13, 14, 15	Added color coding bounding boxes; in-line actions and status definitions; added edits to Review & Launch step
Oct 1, 2014	19 - 22	Added two interaction options for Report filtering
Oct 6, 2014	Several	Solidified design to reflect the decision to go with the "Option B" design for the Message Create Flow.
Oct 7, 2014	Page 12	Created design option so all Freq. options are exposed on load.
Oct 8, 2014	Page 17	Report Detail page
Oct 9, 2014	Pages 9, 10	Added Joined Date options and clarified the independence of "External API" and "Any Attribute"-related actions.
Nov 10, 2014	Several	Renamed the Select Recipients step to Define Triggers, and the Review & Launch step to Review & Enable
Nov 12, 2014	Several	Replaced Visual Design mockups into wireframes as appropriate.

## Reviewed

Date	Names
--	--
Sept 15	Jonathan Mueller
--	--
Sept 25	Jonathan, Myra
--	--
--	--
Oct 3	Jonathan
Oct 3	Jonathan, Dale, Cherie, Myra
Oct 7	Jonathan
-	-
-	-

lyris | **racerx** Feature Bits

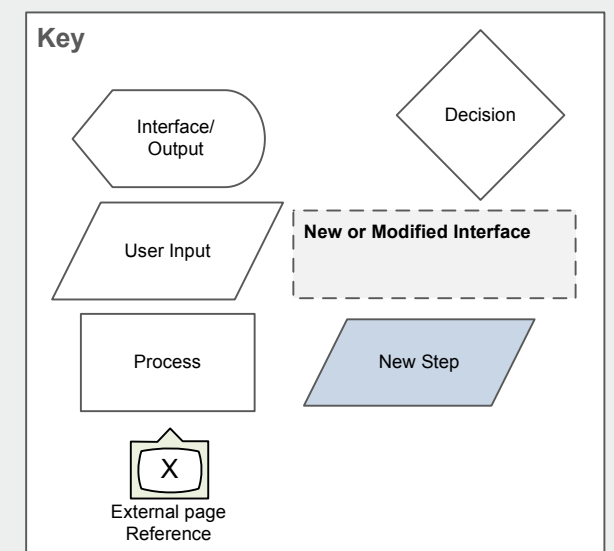
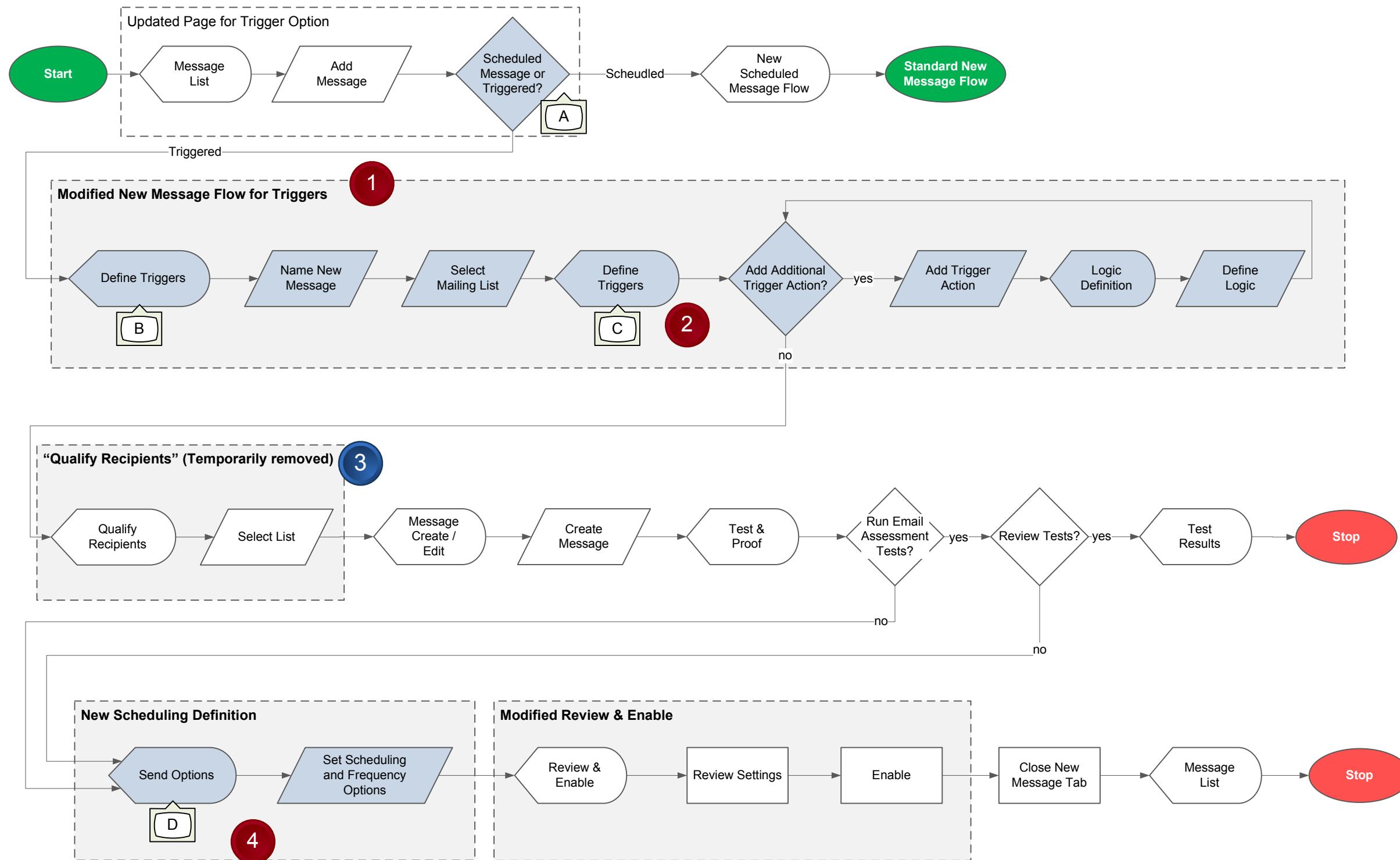
# Process Flow Diagrams

Annotations

1. A second message flow interaction is created to accommodate the options for Triggered Messages.
2. Triggers consist of at least a single trigger Action and. If more than one Action is defined, then operational logic must also be defined providing "and" and "or" statements.
3. **Updated Nov 10:** Selecting the Segment and Suppression lists happens on its own new step, "Qualify Recipients", which consists of only those actions. However, because this will not be supported in the initial rollout of Triggered Messages, this step is not included in these wireframes.
4. The message timing/delay and frequency control settings are moved to what is now the Set Delivery step of the flow.

Page References:

- A. See page *Message List* (1)
- B. See page *Define Triggers* (5)
- C. See page *Define Triggers* (2)
- D. See page *Send Options* (2) & (3)



lyris | **racerox** Feature Bits

## Wireframes

JIRA link: [ONE-2762](#)

Annotations

1. The Add Message button becomes a selection flyout with the options "New Scheduled Message" and "New Triggered Message"
2. A new filter is added to the table so the user can select between seeing all Messages or only "Scheduled Messages" or only "Triggered Messages".
3. A new "Type" column is added with the potential values of "Scheduled", "Scheduled (Split Test)", and "Triggered".

The screenshot shows the Lyris HQ Messages interface. The left sidebar contains navigation options like Lists, Contacts, Segments, Messages, Reports, Email Test Overview, Asset Library, and Launch EmailLabs. The main content area is titled 'Email Marketing - Messages' and includes an 'Add Message' button (annotated with 1), a 'More Actions' button, and a filter dropdown (annotated with 2) set to 'Unsent'. Below this is a table of messages with columns for Message Name, Message Id, Subject, Status, Sent, and Send Date. A new 'Type' column is present in the table (annotated with 3), with values like 'Split test' and 'Waiting t...'. The table lists several messages, including 'Spit Testorama (Split test)', 'Test From name change in versions (Split test)', 'Brian's Split Test Test (Split test)', 'Another Brian Message', 'Email Preview May 19th', 'EA Test message', and 'Test'.

Message Name	Message Id	Subject	Status	Sent	Send Date
Spit Testorama (Split test)		My Subject	Split test	--	--
Test From name change in versions (Split test)		Variable due to Split test	Split test	--	--
Brian's Split Test Test (Split test)		Variable due to Split test	Split test	--	--
Another Brian Message	1639096	HUGE Sale	Waiting t...	--	--
Email Preview May 19th	1466417	6/25 =Email Preview	Waiting t...	--	--
EA Test message	1580246	Litmus, 8/2/2014- Test ...	Waiting t...	--	--
Test	1554415	Test for %%First Na...	Waiting t...	--	--

Hi Dale Mauk, Top 5 Flickr Settings | Help | Logoff

Dashboard Messages

Email Marketing - Messages Options

Add New Message More Actions

Scheduled Message Triggered Message

Status: Unsent Type: All Last Edited: Aug 30, 2014 to Sep 30, 2014

Message Name	Type	Message Id	Subject	Status	Sent
Brian Message	Scheduled	1671656	Here's the Subject	Waiting to b...	--
Can I save this? <a href="#">Preview</a>   <a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Disable</a>   <a href="#">View Report</a>   <a href="#">Clear History</a>	Triggered	1710900	--	Enabled	--
Image Test Mail	Triggered	1703330	bank alert mail	Waiting to b...	--
ffoo	Scheduled (Split Test)	1696037	ffoo	Waiting to b...	--
PixelPop Test Build 11	Scheduled	1693543	This is a PixelPop Test Email	Waiting to b...	--
nanded	Scheduled	1664475	hello	Waiting to b...	--
Test Removing Versions	Triggered	1656122	Subject 2	Disabled	--
Message Name	Scheduled (Split Test)	1648001	Subject	Draft	--
My Triggered Message	Triggered	1647748	Subject	Disabled	--
Email Preview May 19th	Scheduled	1466417	6/25 =Email Preview	Waiting to b...	--

Web Analytics Content Managem...

Annotations

1. The Add Message button becomes a selection flyout with the options "New Scheduled Message" and "New Triggered Message"
2. A new filter is added to the table so the user can select between seeing all Messages or only "Scheduled Messages" or only "Triggered Messages".
3. A new "Type" column is added with the potential values of "Scheduled", "Scheduled (Split Test)", and "Triggered".
4. UPDATED Nov 11: Triggered Messages have an "Enabled" or "Disabled" status but do not have a "Sent" status. "Enabled" means the message is active, and is sent whenever a Triggering event occurs. An enabled message can not be edited. "Disabled" means the message was once Enabled, but is no longer enabled. This is different from "Waiting to be Enabled", because this message was once enabled, and thus may have some reportable data. "Waiting to be Scheduled" is renamed "Waiting to be Enabled" and means all required information has been provided, but the message has never been enabled. "Draft" remains the same as it does for a Scheduled Message – a Triggered Message which has been started and saved, but does not have all required information defined.
5. UPDATED Jan 9 (added "Edit"): Triggered Messages have the following In-line functions when in the following states:  
**Enabled:** "Preview", "Edit", "Copy", "Disable" (which prevents the message from being sent even when triggering events occur), "View Reports", and "Clear History" (which will clear the reportable history of contacts who have activated the trigger, but for the sake of preventing users from receiving more than one email per triggered event, will maintain a historic log of users who have received the triggered message).  
**Disabled:** "Preview", "Edit", "Copy", "Enable" (which activates the message so it's sent according to the triggered logic and send preferences), "View Reports", and "Clear History".  
**Draft:** "Preview", "Copy", "Edit", "Delete"  
**Waiting to be Scheduled:** "Preview", "Copy", "Edit", "Delete"

The screenshot shows the Lyris HQ interface. On the left is a navigation sidebar with options like 'Email Marketing', 'Lists', 'Contacts', 'Segments', 'Messages', 'Reports', 'Email Test Overview', 'Asset Library', and 'Launch EmailLabs'. The main area is titled 'Email Marketing - Messages' and contains a table of messages. A dialog box titled 'Clear History' is overlaid on the message 'Can I save this?'. The dialog contains the text: 'This will permanently delete all reporting data for this message. Are you sure you want to clear the history for this message?' and has 'Cancel' and 'OK' buttons. A blue circle with the number '1' is placed over the 'Clear History' link in the message's row.

Message Name	Type	Message Id	Subject	Status	Sent
Brian Message	Scheduled	1671656	Here's the Subject	Waiting to b...	--
Can I save this? <a href="#">Preview</a>   <a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Disable</a>   <a href="#">View Report</a>   <a href="#">Clear History</a>	Triggered	1748800	--	Enabled	--
Image Test Mail			bank alert mail	Waiting to b...	--
ffoo			ffoo	Waiting to b...	--
PixelPop Test Build 11	Scheduled	1693543	This is a PixelPop Test Email	Waiting to b...	--
nanded	Scheduled	1664475	hello	Waiting to b...	--
Test Removing Versions	Triggered	1656122	Subject 2	Disabled	--
Message Name	Scheduled (Split Test)	1648001	Subject	Draft	--
My Triggered Message	Triggered	1647748	Subject	Disabled	--
Email Preview May 19th	Scheduled	1466417	6/25 =Email Preview	Waiting to b...	--

Annotations

1. **ADDED Jan 14:** When the user clicks the “Clear History” link for a message, this warning appears, alerting the user that their reporting data will be lost. “Cancel” dismisses the dialog and cancels the Clear action, and “OK” confirms the Clear.

Annotations

1. **ADDED Jan 9:** When the user uses the filters above the Messages table and there are no matching messages, this message is displayed over the empty table.

logo Account Info

Dashboard Messages Message Title +

### Email Marketing - Messages

Add New Message More Actions

List: All Mailing Lists ▼ Status: Enabled ▼ Type: Scheduled ▼ Last Edited: Nov 1, 2013 to Dec 31, 2013 ▼

Message Name	Message ID	Type	Subject	Status	Sent	Sent Date
The filter you enabled produced no results. For more results, change your selection.						

Nav

EmailLabs

High Performance Email Marketing

Select to change mailing list: Marketing List

Dec 09, 2014 User Guide Contact Support Logout

- Account Home
  - Mailing List Home
    - View List Home
  - Demographics
    - View Demographics
    - Create Demographic
  - Member Records
    - View Records
    - Upload Records
    - Download Records
    - Add Member Record
  - Messages
    - View Messages
    - Create a Message
    - Content Library
    - Templates
  - Reports
    - View Reports
    - List Breakdown
    - Campaign Reports
  - Advanced Features
    - Segments
    - Opt-In Forms
    - Triggers
    - Distribution Groups
- Expand all | Collapse all

Marketing List

Advanced Features Triggers

Create Trigger

Enabled Triggers		
Name	Conditions	Actions
<input checked="" type="checkbox"/> Brian More Simple Triggerred Message	<ul style="list-style-type: none"> <li>When a user updates profile at any time</li> <li>When a user visits a web page after receiving any message</li> <li>When a user whose demographic is a specific value: Age is 40-49 or 50-59 or 60 or Over</li> <li>Message is sent immediately</li> </ul>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>   <a href="#">Reports</a>   <a href="#">Download Reports</a>   <a href="#">View Message</a>   <a href="#">Clear History</a>
<input checked="" type="checkbox"/> Brians Crazy Sample Trigger	<ul style="list-style-type: none"> <li>When a user updates profile at any time</li> <li>When a user whose demographic is a specific value: Business Title is CEO</li> <li>Message is sent immediately</li> </ul>	This message was not created in EmailLabs, and therefore can only be edited in the interface in which it was created.

Enable All | Disable All

SAVE CANCEL

Disabled Triggers		
Name	Conditions	Actions
Enable All   Disable All		

SAVE CANCEL



Annotations

1. Messages that were created in Lyris HQ can not be edited or viewed in EmailLabs. Therefore, in the Triggered Message list view in EL, the links in the Actions column are replaced with the text: "This message was not created in EmailLabs, and therefore can only be edited in the interface in which it was created."

## Annotations

1. The New Message Create/Edit pages need to reflect the fact that this is a triggered message being created. A Page Title should be added here reading "Triggered Message". The same page for the Scheduled message create flow should contain the header, "Scheduled Message"

2. For the preliminary rollout, the Segments and Suppressions selection will be removed. In its place, is the Trigger definition interaction tools. Thus, this first step will be renamed "Define Triggers".

Lyris HQ - Simplify. Unify.

https://www.lyrishq.net/hq/HqPortal/index.html

Hi Brian Calder. Top 5 Clicks Settings | Help | Logoff

1. Select Recipients > 2. Edit Message > 3. Test & Proof > 4. Set Delivery > 5. Review & Launch Saved Next >

Enter Message Name

Select Recipients

Mailing Lists

Enter/Select Mailing List

Segments

No Segments Available

Select Suppressions

Suppression Lists

Enter/Select Suppression List

Web Analytics

Content Managem...

Annotations

1. UPDATED Nov 10: The New Message Create/Edit pages need to reflect the fact that this is a triggered message being created. A prefix should be added to the message name reading "Triggered Message: ". The same page for the scheduled message create flow should now contain the prefix, "Scheduled Message: "

2. For the preliminary rollout, the Segments and Suppressions selection will be removed. In its place, is the Trigger definition interaction tools. See the *Define Triggers - (Adding Trigger)* page for details.

3. Triggered messages can be sent either only to the user who activates the trigger (default), only to 1 or more some specified email address, or to both. This is a radio button selection, with the "user who activated.." selected by default. When the second or third option is selected, a text field appears to the right with the interior label "Email address" so the user can specify the address.

To the user who activated the trigger

To a specified email address

To both the user who activated the trigger *and* to a specified email address

4. UPDATED November 25: The Mailing List must be identified before trigger actions can be defined. If the user clicks the Add Trigger or Add Group links before a mailing list is selected, the following alert appears:

Select a Mailing List

You must select a Mailing List above before you can define any Trigger actions.

See *Define Triggers (Change Mailing List Warning)* page for changing the mailing list.

5. Added November 10: This first step is renamed from "Select Recipients" to "Define Triggers", and the "Review & Launch" step is renamed "Review & Enable". These modifications are for Triggered Messages only – not Scheduled.

6. **ADDED FEB 11:** The instructions read, "Create a triggered message by combining actions with conditions below. Actions determine what behavior is required for the message to be sent. Conditions determine who is eligible to receive the message. Any action (i.e. Joined A List, Updated Any Profile Attribute, etc.) can be combined with one or more conditions (i.e. Profile Attribute = Specific value) and linked by AND or OR logic. Actions and conditions can be combined to form a group and groups can be nested in other groups. Note: Actions can not be linked by AND logic - only by OR logic; conditions can be linked by any logic but require pairing with an action."

Hi Dale Mauk. Top 5 Flicks Settings | Help | Logoff

1. Define Triggers > 2. Edit Message > 3. Test & Proof > 4. Send Options > 5. Review & Enable Save Next >

Triggered Message: Enter Message Name

Mailing List  
Enter/Select Mailing List

Triggering Action

To create your trigger, add one or more actions. The actions will determine whether or not the trigger is activated. Once activated, the message will be sent to the recipient. More than one action can be applied to a single Group, each separated by an "And" or "Or". Groups can then also be separated by an "And" or "Or", and groups can be nested within other groups.

change order remove group

Updates their profile and the att AND

Updates the attribute State to eg

[ Add Trigger Action ]

[ Add Nested Group ]

[ Add Group ]

Deliver this message

- To the user who activated the trigger
- To a specified email address
- To both the user who activated the trigger and to a specified email address

Web Analytics

Content Managem...

Annotations

1. ADDED OCT 15: Because the mailing list is the foundation for some of the Trigger actions, once "Update Profile" actions are defined as triggers, the system must warn the user that those actions will be removed from the trigger logic when the user tries to change the Mailing List.

<b>Warning: Trigger Actions will be lost</b>
Changing the Mailing List for this message will reset all "Update Profile" actions already defined. Do you still want to change the Mailing List?
Proceed Cancel

1. The initial state shows a 'Change Order' trigger definition. A list of actions and conditions is displayed, including 'Joined this mailing list', 'Updated any attribute in their profile', 'The following attribute has a specified value', and 'External API'. A secondary flyout shows options: 'Joins at any time' and 'Joins on or after a specified date'.

2. The user selects 'Joins on or after a specified date'. A date picker is shown for October 2014, with the 31st selected. A secondary flyout shows operators: 'equal to', 'not equal to', 'less than', 'greater than', 'blank or null', and 'any value'.

3. The user selects 'The attribute Age is greater than this value'. A secondary flyout shows operators: 'equal to', 'not equal to', 'less than', 'greater than', 'blank or null', and 'any value'.

4. The user selects 'The following attribute has a specified value'. A secondary flyout shows attributes: 'Any Attribute', 'Address', 'Age', 'Age\_text', 'AutoIncrement', and 'Birthdate'.

Annotations

1. The Trigger definition interaction is the same as that used in Add a Segment. When the user clicks "Add Trigger Action" (rather than "Add Condition" as they would creating a segment), the flyout contains the following:

- "UPDATED OCT 09: Joined" is simply a user has joined this mailing list either ever (going forward) or after a specified date, presented in a secondary flyout.
- "Updated Profile" means the user has made a specific change to their own profile. **UPDATED JAN 20:** This option contains additional options presented in a secondary flyout.
- "External API" activates the connection to the configuration set up with \_\_\_\_\_.
- **ADDED JAN 20:** "The following attribute has the specified value" provides the flyout to define a conditional filter.

ADDED OCT 15: The Trigger actions can only be defined AFTER a mailing list is selected. Therefore, until the user selects a mailing list, the links within the Trigger definition ("Add Trigger Action", "Add Nested Group", and "Add Group") are disabled.

2. UPDATED Nov 12: See *Define Triggers - (External API Warning)* page.

3. ADDED OCT 09: The "Joined this mailing list" action has two secondary options shown in this flyout. "Joins at any time" means that once this triggered message is enabled, as soon as a user joins the mailing list, will activate the trigger. "Joins on or after a specified date" means the same as above, but delays the activation of the trigger.

4. ADDED OCT 09: Once the Joined on or after a specified date is selected, the user must click the "specified date" text to select that date from the standard HQ date picker interaction.

5. ADDED OCT 09: Once a date is selected, that date is a link to open the date picker again to change the value.

6. **UPDATED JAN 20:** The secondary "The following attribute has a specified value" flyout contains all of the contact fields which can be updated, plus the choice "Any Attribute" is listed first. When "Any Attribute" is selected, any change made to any attribute will activate the trigger.

ADDED OCT 09: If any other attribute is already selected for another trigger action, "Any Attribute" is hidden from this list.

ADDED Oct 15: When one of the attributes is defined, such as "State is equal to California", the query actually functions as (Any profile attribute is updated) AND (State = "California"). In other words, even if the State was already "California" and the user updates the "Last Name" attribute, the message is triggered.

7. When one of the profile fields is selected, the user must define an operator and a relative value. The operators will be the following:

- equal to
- not equal to
- less than
- greater than
- blank or null
- any value

8. Some values will require an open-text field so the user can specify a value. Other inputs will include date pickers, select lists (TBD), or true/false (checkbox).

**1** [ Add Trigger Action or Condition ]  
 Joined this mailing list  
 Updated any attribute in their profile  
 The following attribute has a specified value  
 External API

First Name  
 Last Name  
 State  
 Age  
 Gender

**2** [ Add Trigger Action or Condition ]  
 The attribute, State is equal to CA  
 [ Add Trigger Action or Condition ]  
 Joined this mailing list  
 Updated any attribute in their profile  
 The following Attribute has a specified value  
 External API

**3** [ Add Trigger Action or Condition ]  
 The attribute, State is equal to CA  
 Updated any attribute in their profile  
 [ Add Trigger Action or Condition ]  
 [ Add Nested Group ]

[ Add Group ]

**4** [ Add Trigger Action or Condition ]  
 The attribute, State is equal to CA  
 Updated any attribute in their profile  
 [ Add Trigger Action or Condition ]  
 [ Add Nested Group ]

[ Add Group ]

Annotations

**ADDED JAN 20:**

1. The Conditional filter is separated from the Update Profile action, and is now a individual option in the Flyout. The "Update Profile Attribute" action is renamed "Updated any attribute in their profile", and no longer has a flyout with any further options.

2. **UPDATED JAN 28:** The conditional filter can not exist in a trigger action on its own. If the "The following attribute..." conditional filter is applied to a group, that condition must also have a Update or Join action or be a part of an "And" type of logic associated with another group with an action. If a condition is created without an associated action, the red-text error appears at the top of the group, and the border of that group becomes red.

3. Once the user adds an action into the group, the red text and borders turn to normal again.

4. The appropriate logic must be applied for the use of the conditional filter to be valid. In this case, because of the "Or" operator, the conditional filter does not have a valid action associated with it.

**REMOVED Feb 11:** Because the system can not currently support a trigger based on two actions (Join Anytime AND Updated), in the event that this happens, the front end should "ignore" the "Joined" clause of the trigger logic when it stores the query to the backend. In other words, if a message's trigger logic is constructed as:

```

("Joined this mailing list at any time
AND
Attribute State = CA)
    
```

```

AND
(Updated any attribute in their profile
AND
Attribute Gender = Male)"
    
```

Then the trigger will be stored as:

```

"State = CA
AND
Updated any attribute
AND
Gender = Male"
    
```

## Annotations

1a. A group with only a conditional filter is invalid.

1b. ...But adding an Update action with an "And" relationship makes the trigger valid.

2a. The logic of [Action] and [Condition 1] or [Condition 2] is unclear, and therefore invalid. The "first name = something" may exist on its own without an action.

2b. The two conditions must be grouped in either a nested group, or their own group in order to specify that their relationship is an or, and collectively, they (their group) have an "And" relationship with the Action.

Change Order Remove Group

❗ To enable a message, any attribute condition or group of conditions must be paired with a Join or Update action

The attribute, State is equal to CA X

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

1a

1b

Change Order Remove Group

The attribute, State is equal to CA And X

Updated any attribute in their profile X

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

[ Add Group ]

Change Order Remove Group

❗ To enable a message, any attribute condition or group of conditions must be paired with a Join or Update action

Updated any attribute in their profile And X

The attribute, State is equal to CA Or X

The attribute, Firstname is equal to "Something" X

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

2a

2b

Change Order Remove Group

Updated any attribute in their profile X

And

Change Order Remove Group

The attribute, State is equal to CA Or X

The attribute, Firstname is equal to "Something" X

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

[ Add Group ]

Change Order Remove Group

Updated any attribute in their profile [X]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

And

Change Order Remove Group

The attribute, State is equal to CA Or [X]

The attribute, Firstname is equal to "Something" [X]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

Or

Change Order Remove Group

**To enable a message, any attribute condition or group of conditions must be paired with a Join or Update action**

The attribute, State is equal to WA Or [X]

The attribute, Firstname is equal to "Something Else" [X]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

[ Add Group ]



Change Order Remove Group

Updated any attribute in their profile [X]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

And

Change Order Remove Group

Change Order Remove Group

The attribute, State is equal to CA Or [X]

The attribute, Firstname is equal to "Something" [X]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

Or

Change Order Remove Group

The attribute, State is equal to WA Or [X]

The attribute, Firstname is equal to "Something Else" [X]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

[ Add Trigger Action or Condition ]

[ Add Nested Group ]

[ Add Group ]

Annotations

1a. This use case is similar to #2 on the previous page, except the conditions are grouped with other conditions. Still, the relationship between the Update action and the other two groups is unclear and the trigger is therefore invalid. The one condition "Firstname = Something Else" could be true, and this statement would be true – but that is not a valid trigger without an action.

1b. The Conditional filters can be grouped as nested groups inside another nested group, or as nested groups inside a new group as seen here. This new group has an "And" relationship with the first group with the Update action.

The screenshot shows two trigger configuration panels. The top panel is titled "Change Order" and contains a condition "Updated any attribute in their profile". Below it are buttons for "[ Add Trigger Action or Condition ]" and "[ Add Nested Group ]". The bottom panel is also titled "Change Order" and contains a condition "Joined this mailing list at any time". Below it are buttons for "[ Add Nested Group ]" and "[ Add Group ]". Between the two panels, the word "And" is circled in red, and a blue circle with the number "1" is next to it, indicating an error.

The screenshot shows two trigger configuration panels. The top panel is titled "Change Order" and contains a condition "Updated any attribute in their profile". Below it are buttons for "[ Add Trigger Action or Condition ]" and "[ Add Nested Group ]". The bottom panel is also titled "Change Order" and contains a condition "Joined this mailing list at any time". Below it are buttons for "[ Add Trigger Action or Condition ]" and "[ Add Nested Group ]". Between the two panels, the word "Or" is circled in red, indicating a valid configuration.

Annotations

1. **ADDED Feb 11:** When a Trigger construction contains a Join and an Update paired with an "And", it is invalid. In these cases, both of actions are indicated as error.

Annotations

1. **ADDED Nov 25:** When an External API trigger action is set, the user can not use any other actions. Therefore, the system should reflect that, not only when a user tries to add another action, but before they even try. This message is presented in the action object, accompanying the "External API" selection.
2. **UPDATED Nov 12:** External API can not be used in conjunction with other trigger actions. If any trigger actions are already defined, then "External API" is not available in this flyout. Once External API is selected, an alert notifies the user, "The External API trigger can not be used in conjunction with any other actions or groups." Once "External API" has been selected as a trigger, when the user selects any of the three "[Add ...]" links the same alert opens to remind the user.

The screenshot shows a configuration interface for defining triggers. It features a main container with a dashed green border. Inside, there are two main sections separated by an 'Or' operator. Each section is a 'Change Order' group with a 'Remove Group' link. The first group contains two nested 'And' groups: 'Updates their profile and the attribute Age to greater than 21' and 'Updates their profile and the attribute State to equal to California'. The second group contains one nested 'And' group: 'Joins this mailing list'. Below these are buttons for '[Add Trigger Action]', '[Add Nested Group]', and '[Add Group]'. A red circle labeled '1' is positioned to the left of the top group. A second red circle labeled '2' is positioned to the left of a new nested group being added, which contains 'Updates their profile and the attribute Age is greater than 18' and 'Updates the attribute State to equal to Nevada'. This new group is highlighted with a yellow background. Below the main configuration area, there is a larger preview window showing the same structure with a yellow highlight on the new nested group.

Annotations

1. This query would read as, '((Updates Profile) AND (Age > 21) AND (Updates Profile) AND (State to = "California")) OR (Joins this Mailing List)'.  
 2. UNLIKE THE "ADD SEGMENT" interaction, triggers action definitions can contain multiple levels of nested groups.

An additional function is added to each group to "Add a nested group". Visually, this adds a smaller "Group" box inside the current group box, and provides a means of defining a nested group.

These nested groups are built exactly the same way as the top-level parent.

UPDATED OCT 15: This query would read as, '((Updates Profile) AND (Age to > 21) AND (Updates Profile) AND (State to = "California")) OR (Joins this Mailing List AND ((Updates Profile) AND (Age to > 13) OR (Updates Profile) AND (State to = "Nevada")))'.

change order
remove\_group

Joins this mailing list ✕

AND

change order
remove\_group

Updates their profile and the attribute Age is greater than 18 AND ✕

Updates the attribute State to equal to Nevada ✕

OR

change order
remove\_group

Updates their profile and the attribute Age is greater than 21 AND ✕

Updates the attribute State to equal to Colorado ✕

[ Add Trigger Action ]  
 [ Add Nested Group ]

[ Add Trigger Action ]  
 [ Add Nested Group ]

[ Add Trigger Action ]  
 [ Add Nested Group ]

[ Add Group ]

Annotations

```

{
background : -moz-linear-gradient(50% 100% 90deg,rgba(61, 51, 0, 1) 0%,rgba(107, 90, 1, 1) 100%);
background : -webkit-linear-gradient(90deg, rgba(61, 51, 0, 1) 0%, rgba(107, 90, 1, 1) 100%);
background : -webkit-gradient(linear,50% 100% ,50% 0% ,color-stop(0,rgba(61, 51, 0, 1) ),color-stop(1,rgba(107, 90, 1, 1) ));
background : -o-linear-gradient(90deg, rgba(61, 51, 0, 1) 0%, rgba(107, 90, 1, 1) 100%);
background : -ms-linear-gradient(90deg, rgba(61, 51, 0, 1) 0%, rgba(107, 90, 1, 1) 100%);
-ms-filter:
"progid:DXImageTransform.Microsoft.gradient(startColorstr=#3D3300', endColorstr=#6B5A01' ,GradientType=0)";
background : linear-gradient(0deg, rgba(61, 51, 0, 1) 0%, rgba(107, 90, 1, 1) 100%);
filter:
progid:DXImageTransform.Microsoft.gradient(startColorstr=#6B5A01',endColorstr=#3D3300' , GradientType=0);
}
{
background : -moz-linear-gradient(50% 100% 90deg,rgba(198, 191, 152, 1) 0%,rgba(237, 237, 223, 1) 100%);
background : -webkit-linear-gradient(90deg, rgba(198, 191, 152, 1) 0%, rgba(237, 237, 223, 1) 100%);
background : -webkit-gradient(linear,50% 100% ,50% 0% ,color-stop(0,rgba(198, 191, 152, 1) ),color-stop(1,rgba(237, 237, 223, 1) ));
background : -o-linear-gradient(90deg, rgba(198, 191, 152, 1) 0%, rgba(237, 237, 223, 1) 100%);
background : -ms-linear-gradient(90deg, rgba(198, 191, 152, 1) 0%, rgba(237, 237, 223, 1) 100%);
-ms-filter:
"progid:DXImageTransform.Microsoft.gradient(startColorstr=#C6BF98', endColorstr=#EDEDFF' ,GradientType=0)";
background : linear-gradient(0deg, rgba(198, 191, 152, 1) 0%, rgba(237, 237, 223, 1) 100%);
filter:
progid:DXImageTransform.Microsoft.gradient(startColorstr=#EDEDFF',endColorstr=#C6BF98' , GradientType=0);
}
    
```

## Annotations

1. The "Set Delivery" step is renamed "Send Options" for both Triggered and Scheduled messages.

2. The Scheduling interface would be modified to accommodate the additional options such as Send Delay and Optimize Send Frequency.

The screenshot displays the Lyris HQ web application interface. The browser address bar shows the URL <https://www.lyrishq.net/hq/HqPortal/index.html>. The user is logged in as Brian Calder. The navigation menu on the left includes 'Email Marketing', 'Lists', 'Contacts', 'Segments', 'Messages', 'Reports', 'Email Test Overv...', 'Asset Library', and 'Launch EmailLabs'. The main content area shows a breadcrumb trail: '1. Select Recipients > 2. Edit Message > 3. Test & Proof > 4. Set Delivery > 5. Review & Launch'. The current step is '4. Set Delivery'. The interface is titled 'My Triggered Message' and contains the following fields:

- Send Date:** Includes 'Later' and 'Now' buttons, and two input fields labeled 'Select Date' and 'Select Time'.
- Reports:** Includes a checkbox for 'Delivery Monitor'.
- BCC:** A text input field.

Red circles with the numbers 1 and 2 are overlaid on the 'Reports' section and the 'BCC' field, respectively, corresponding to the annotations on the right.

Hi Dale Mauk. [Top 5 Flicks](#) [Settings](#) | [Help](#) | [Logoff](#)

1. Define Triggers > 2. Edit Message > 3. Test & Proof > 4. **Send Options** > 5. Review & Enable [Save](#) [Back](#) [Next](#)

**Triggered Message**

Triggered Message: [My Triggered Message](#)

**Set Delay?**

By default, the triggered message is sent immediately after all the "Trigger Logic" parameters are met. You have the option of delaying the delivery of the triggered message, which will allow you to create an automated "followup" message.

No, send immediatly

Yes, according to a specified schedule

**Optimize Send Frequency**

**Send Frequency Options**

When message send is triggered by an update to a profile attribute, the default behavior is to send the trigger message every time.

Only once per individual

Every time the trigger conditions are satisfied

**Proportional Limiter**

Send to every Nth person who triggers a message.

**Total Response Limit**

Limit trigger responses to all users to N total messages within X days.

## Annotations

1. The Set Delivery step is renamed "Send Options" for both the Triggered Message Create Flow and the Scheduled Message Create Flow. For Triggered Messages, the contents of the page are replaced with the "Set Delay" and "Optimize Send Frequency" interactions.
2. The Set Delay settings consists of a radio button option with the "No, Send Immediately selected by default. See the *Send Options - (Defining Details)* page for interaction details.
3. **UPDATED Jan 9:** The "Optimize Send Frequency" section provides some instruction, and then various options. The default setting is to send the trigger message every time if this is an update profile trigger, and only once otherwise. See the *Send Options - (Defining Details)* page for interaction details. **ADDED Jan 9:** When the page loads, the appropriate option is selected based on the presence of an Update Profile action in the trigger definition. If one is present, then "Every time..." is automatically selected, and the "When message send is ..." explanation appears below the sub-header. If no Update Profile action is present in the trigger definition, then the "Only once..." is selected. The user can change either default selection.
4. Added Nov 10: After the Message has been named, the message name is preceded by "Triggered Message: " or "Scheduled Message: ".

**Set Delay**

**Set Delay?**

By default, the triggered message is sent immediately after all the "Trigger Log allow you to create an automated "followup" message.

No, send immediatly

Yes, according to a specified schedule

After N day(s) at this time

Opt N days relative to this date

If no option is selected, the default behavior is to send the trigger message evi

No, send immediatly

Yes, according to a specified schedule: After 1 day(s) at 12:00 pm PST

ok

No, send immediatly

Yes, according to a specified schedule: After 1 day(s) at 12:00 pm PST

Choose Time

Time 12:00 pm

Hour

Yes, according to a specified schedule: 2 day(s) relative to this date at this time

before

after

Yes, according to a specified schedule: 2 day(s) after this date at this time.

Birthdate

Joined Date

**Optimize Send Frequency**

**Optimize Send Frequency**

If no option is selected, the default behavior is to send the trigger message every time if this

**Send Frequency Options**

Only once per individual

Every time the trigger conditions are satisfied

**Proportional Limiter**

Send to every Nth person who triggers a message.

**Total Response Limit**

Limit trigger responses to all users to N total messages within X days.

**Send Frequency Options**

Only once per individual

Every time the trigger conditions are satisfied

... but no more than once every N days.

**Annotations**

1. The other Set Delay options is "Yes, according to a specified schedule". When selected a flyout is presented in which the options are shown here.
2. When the "After N days..." option is selected, the user then needs to define the "N" value with a numeric value in a flyout numeric field, and the time value from a select list containing each hour 12:00pm – 11:00am ("12:00pm PST", "1:00pm PST", etc). The visual designs of these flyout elements mirror those used in Segmentations.
3. **UPDATED JAN 27:** Alternately, if the "N days to relative..." is selected, the user must define the number of days in a flyout numeric field; select one of the date attribute fields in the profile (or the Joined Date field); and specify a send time.
4. In this option, all of the Optimize Send Frequency options are exposed from the beginning. The user can toggle any of them on or off.
5. When "Every time the trigger..." is selected a secondary option is displayed so the user can define a maximum frequency.

The screenshot shows the Lyris HQ interface for reviewing and launching a message. The breadcrumb trail at the top indicates the current step is "5. Review & Launch". The main content area displays the message details for "Brian Message".

**Message Details:**

Mailing List:	Brian's List (4)
Segment:	N/A
Suppression List:	N/A
Send Date:	N/A
Subject:	Here's the Subject
From Name:	Brian
From Email:	bcalder@lyris.com

Buttons: "Schedule" (1), "Save" (2), "Back", "Saved".

## Annotations

1. The "Schedule" button on the Review & Enable step of the Message Create flow needs to change to "Enable" for Triggered Messages since they are not scheduled.
2. Similarly to the Scheduled Messages, this button says "Save" and "Saved". However, once the message is enabled, rather than "Stop" and "Stopped", the button changes to "Disable" or "Disabled" depending on the state.
3. **Added Nov 10:** The "Review & Launch" step is renamed "Review & Enable"

Annotations

1. The "Schedule" button on the Review & Enable step of the Message Create flow needs to change to "Enable" for Triggered Messages since they are not scheduled.
2. Similarly to the Scheduled Messages, this button says "Save" and "Saved". However, once the message is enabled, rather than "Stop" and "Stopped", the button changes to "Disable" or "Disabled" depending on the state.
3. Added Nov 10: The "Review & Launch" step is renamed "Review & Enable"
4. **ADDED Jan 9:** The displayed meta-information for the triggered message is modified to reflect the settings of a triggered message and grouped by the different stages of the create process. The Trigger Action's "View" link opens an overlay that contains the complete Trigger Action definition in plain English as seen below.

Mailing List:	New Customers
Subject:	Welcome
From Name:	Customer Service
From Email:	service@company.com
Trigger Action:	<p><a href="#">Hide</a> ▲</p> <p>(Any user who updated any attribute of their profile)  AND  (Who was sent the message "Spring Sale" and clicked one of these links  OR  Who was sent the message "July Fashions" and clicked one of these links)</p>
Deliver this Message:	To user who activated the trigger
Set Delay:	None
Send Frequency Option:	Only once per individual
Proportional Limiter:	None
Total Response Limit:	None

Alternate values to some of the settings are seen here. These same values would also be applied to the Additional Information overlay on the Report Details page (See the "Report Details (Additional Information)" page for more information)

Mailing List:	New Customers
Subject:	Welcome
From Name:	Customer Service
From Email:	service@company.com
Trigger Action:	<a href="#">View</a>
Deliver this Message:	User who activated the trigger, name@abc.com, email@abc.com
Set Delay:	After 1 day(s), at 12:00pm PST
Send Frequency Option:	Every time trigger action is satisfied, but no more than once every 14 days
Proportional Limiter:	Every 4 <sup>th</sup> person
Total Response Limit:	10,000

Annotations

In Addition to the changes to the Create / Edit Message pages is modifications to the Reports Overview page.

1. A filter is added to the Reports Overview page to let the user select between seeing all Messages or only "Scheduled Messages" or only "Triggered Messages".

2. A new "Type" column is added with the potential values of "Scheduled", "Scheduled (Split Test)", and "Triggered".

Lyris HQ - Simplify. Unify. x  
 https://www.lyrishq.net/hq/HqPortal/index.html  
 Hi Brian Calder. Top 5 Flickr Settings | Help | Logoff

Email Marketing - Reports Overview

Check For New Data Download Report Additional Reports

List: All Mailing Lists Status: All Date Range: Aug 03, 2014 to Sep 03, 2014

Message Name	Subject	Status	Segment	Date Sent	Sent	Delivered	Opens	Unique Opens	Unique Clicks
standard message	Subject	Sent	Gmail Addresses	Aug 8, 2014 11:01 A...	9	9	6	5	0
Manual Split Test Examl...	Variable due to Split test	Test S...	(No Segment)	N/A	2	2	1	1	0
2 messages in a split (Spli...	Variable due to Split test	Test S...	(No Segment)	N/A	12	12	1	1	0
time test DEV-12624 (Spli...	Variable due to Split test	Sent	(No Segment)	Aug 27, 2014 2:01 A...	6	6	2	2	0
time test DEV-12624 (Spli...	Variable due to Split test	Sent	(No Segment)	Aug 28, 2014 12:01 A...	6	6	0	0	0
Demo Of Split Test (Split ...	Variable due to Split test	Sent	(No Segment)	Aug 15, 2014 1:01 P...	11	11	1	1	0
test from name (Split Test)	Variable due to Split test	Sent	(No Segment)	Aug 4, 2014 4:42 AM ...	6	6	1	1	0
Automatic Split Test Exam...	Variable due to Split test	Sent	(No Segment)	Aug 13, 2014 5:01 P...	11	11	0	0	0

standard message

Subject: Subject  
 From Email: mfriel@lyris.com  
 Sent: Aug 8, 2014 11:01 AM PST

55.6% Unique Opens (5)  
 0% Unique Clicks (0)  
 0% Bounces (0)  
 0% Unsubscribes (0)

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Settings | Help | Logoff

**Email Marketing**

- Lists
- Contacts
- Segments
- Messages
- Reports
- Email Test Overview
- Asset Library
- Launch EmailLabs

Dashboard
Reports Overview

### Email Marketing - Reports Overview

Check For New Data
Download Report

Additional Reports

List: All Mailing Lists | Status: All | Type: All | Date Range: Sep 08, 2014 to Oct 08, 2014

Message Name	Subject	Type	Status	Segment	Date Sent	Sent	Delivered	Opens	Unique Opens	Unique Clicks
my triggered message	My Triggered Message	Scheduled	Sent	(No Segment)	Oct 7, 2014 8:05 PM ...	0	0	0	0	0
my triggered message	My Triggered Message	Scheduled	Sent	(No Segment)	Sep 30, 2014 1:56 P...	0	0	0	0	0
test2 - copy - copy	test 4 gmail response from...	Triggered	Enabled	(No Segment)	Sep 25, 2014 4:46 P...	11	11	4	4	1
test2 - copy	test 3 gmail response from...	Triggered	Enabled	(No Segment)	Sep 25, 2014 4:13 P...	10	10	6	4	2
test2 - copy	test 2 gmail response from...	Scheduled	Sent	(No Segment)	Sep 25, 2014 4:09 PM...	10	10	4	4	2
test2	test gmail response from i...	Scheduled	Sent	(No Segment)	Sep 25, 2014 4:03 PM...	10	10	8	4	2
pixelpop test 1	From Lyris Engineer - Ge...	Triggered	Disabled	(No Segment)	Sep 25, 2014 1:34 P...	140	140	175	66	0
tom test - copy	wow pixel work	Scheduled	Sent	tom	Sep 24, 2014 4:51 P...	1	1	2	1	1
tom test	wow pixel work	Scheduled	Sent	tom	Sep 24, 2014 4:27 PM...	1	1	2	1	1
pixelpop test	This is a PixelPop Test E...	Triggered	Enabled	(No Segment)	Sep 23, 2014 5:01 PM...	4	4	21	4	4
lyris_test_mail	lyris test mail	Scheduled	Sent	test	Sep 22, 2014 11:48 P...	3	3	3	2	0
nameen - copy	test mail	Scheduled	Sent	test	Sep 22, 2014 5:52 AM...	2	2	4	2	0
nameen	test mail	Scheduled	Sent	test	Sep 22, 2014 5:40 AM...	0	0	0	0	0
test	Test	Scheduled	Sent	(No Segment)	Sep 15, 2014 12:44 P...	1	1	1	1	1
test	Test	Scheduled	Sent	(No Segment)	Sep 15, 2014 12:37 P...	1	1	2	1	1
test	Test	Scheduled	Sent	(No Segment)	Sep 12, 2014 11:26 A...	1	1	3	1	1
Only send to a portion of t...	You are among the first 3 ...	Scheduled (Split Test)	In Test	(No Segment)	N/A	3	3	7	3	0
Only send to another port...	You are getting this mess...	Scheduled (Split Test)	Test S...	(No Segment)	N/A	3	3	2	2	0

my triggered message

**Subject:** My Triggered Message

**From Email:** nameen@encoreess.com

**Sent:** Oct 7, 2014 8:05 PM PST

0%

Unique Opens

0%

Unique Clicks

0%

Bounces

0%

Unsubscribes

Annotations

In Addition to the changes to the Create / Edit Message pages is modifications to the Reports Overview page.

1. A filter is added to the Reports Overview page to let the user select between seeing all Messages or only "Scheduled Messages" or only "Triggered Messages".
2. A new "Type" column is added with the potential values of "Scheduled", "Scheduled (Split Test)", and "Triggered".

Annotations

1. For Triggered Messages the "Date Sent" should be replaced with a date range selection. This allows the user to view the message's performance within a specified time.
2. The Activated Trigger data point is added to the report reflecting how many emails were sent to customers who activated the trigger.

**Message Name:** Example Message  
**Status:** Sent

**Winning Version:**  
**Subject:** Subject One from Automatic Test  
**From:** reply-29998@elabs5.com  
**Sent:** Aug 13, 2014 5:01 PM  
**Description:**

**Message Totals:**  
 Unique Opens: 0%  
 Unique Clicks: 0%  
 Bounces: 0%  
 Unsubscribes: 0%  
 Conversions: 0%

**Recipient Behavior**

Version	Sent	Total Opens	Unique Opens	Total Clicks	Unique Clicks	Unsubscribes	Conversions	Revenue	Unique/Total ...
▶ Test Details									
Totals	11	0	0/0%	0	0/0%	0	0	\$0	0/0

**Message Delivery**

Version	Website Visitors	Mailing Index	Delivered	List Quality Index	Total Bounces	Spam
▶ Test Details						
Totals	0	210	11	300	0	0

**Links**

Version	Link	Total Clicks	Unique Clicks	Unique Clicks %	Conversions	Revenue
No Data Available No Results Found						

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Hi Dale Mauk. Top 5 Flicks Settings | Help | Logoff

**Email Marketing**


- Lists
- Contacts
- Segments
- Messages
- Reports
- Email Test Overview
- Asset Library
- Launch Email Labs

Dashboard
Reports Overview
20% Off Summer Sa...

### Email Marketing - Standard Report

**Subject:** Lorem ipsum dolor sit amet  
**Status:** Sent

Triggered Message



**Subject:** Lorem ipsum dolor sit amet, consectetur  
**From Email:** marketing@lyris.com  
**Date Range:** Sept. 1 2014 - Sept. 30, 2014  
**Description:** Lorem ipsum dolor sit amet, consectetur adipiscing elit  
**Additional Information**

**Message Totals:**

3%  
75  
Unique Opens

4%  
100  
Unique Clicks

2%  
50  
Bounces

1%  
25  
Unsubscribes

3%  
75  
Conversions

[View EA Reports](#)

[Visual Message Report](#)

**Note:** This message was edited on October 15, 2014

**\* Note:** Reported counts and percentages are calculated based on the Total Sent, which is the sum of the messages sent to users who activated the trigger and the messages sent to alternate addresses specified in the "Deliver this message" step of the message creation.

#### Recipient Behavior

Total Sent	*Activated Trigger	*Alternate Addresses	Total Opens	Unique Opens	Total Clicks	Unique Clicks	Unsubscribes	Conversions	Revenue	Unique/Total Referrers
14,000	7,000	7,000	520/2.2%	490/1.9%	160/0.7%	160/0.7%	162	30	\$5,740	22/27

#### Message Delivery

Website Visitors	Mailing Index	Delivered	List Quality Index	Total Bounces	Spam
20,000	85	10,291	90	39	390

#### Links

Links: [All Links](#)

Link	Total Clicks	Unique Clicks	Unique Click %	Conversions	Revenue
Link 1	12	10	45%	2	\$500
Link 2	12	10	45%	2	\$500

Annotations

1. For Triggered Messages the "Date Sent" is replaced with a Date Range selection. This allows the user to view the message's performance within a specified time.
2. Unlike the Scheduled Messages, triggered messages may also be sent to one or more alternate addresses. These are counted among the total sent. Therefore, when these alternate addresses are included, the Triggered Message report detail must also contain the counts for those sent to users who activated the trigger ("Activated Trigger") and those sent to an alternate email address ("Alternate Address(es)").  
When no email address has ever been defined for a message in the "Deliver this message" step, these two additional columns are not present, and "Total Sent" reads "Sent".
3. This note explains the point above (2) to the user so they understand the calculations. Similar to (2) above, this note is also only present when any alternate email address has been defined for this message.  
**ADDED Jan 9:** This Notes block also alerts the user if any edits were made to the message AFTER it was initially enabled. If so, these "notes" are each listed above the "Report counts" note.
4. The Download Report option presents a flyout menu from which the user can select "General Statistics" or "General Statistics by day". The date range filter applied to the current view is also applied to the downloaded report.  
The former downloads a CSV file of the data represented in the related table, in which the data points are reflected in a single row.  
"General Statistics by day" downloads a CSV file of the data in which each column represents a single day of the selected range.
5. **ADDED JAN 28:** Total Opens is also a part of the standard set of data points

lyris | HQ

Hi Dale Mauk. Top 5 Flicks Settings | Help | Logoff

Dashboard Reports Overview 20% Off Summer Sa... +

### Email Marketing - Standard Report

**Subject:** Lorem ipsum dolor sit amet  
**Status:** Sent  
 Triggered Message

View EA Reports  
 Visual Message Report

**Additional Information**

Name: Welcome  
 Category: Other  
 Tracking: HTML & Text  
 Trigger Action: View ▼  
 Deliver To: User who triggers message  
 Delay: None  
 Send Frequency Options: Only once per user  
 Proportional Limiter: None  
 Total Response Limit: None

Close

Unique Clicks 4% 100 Bounces 2% 50 Unsubscribes 1% 25 Conversions 3% 75

\* Note: Reported counts and percentages are based on the messages sent to alternate addresses.

#### Recipient Behavior

Download Report

Total Sent	*Activated Trigger	*Alternate Addresses	Total Opens	Unique Opens	Total Clicks	Unique Clicks	Unsubscribes	Conversions	Revenue	Unique/Total Referrers
14,000	7,000	7,000	520/2.2%	490/1.9%	160/0.7%	160/0.7%	162	30	\$5,740	22/27

#### Message Delivery

Download Report

Website Visitors	Mailing Index	Delivered	List Quality Index	Total Bounces	Spam
20,000	85	10,291	90	39	390

#### Links

Links: All Links ▼

Download Report

Link	Total Clicks	Unique Clicks	Unique Click %	Conversions	Revenue
Link 1	12	10	45%	2	\$500
Link 2	12	10	45%	2	\$500

Annotations

1. **ADDED Jan 9:** All of the settings of the Triggered Message are reviewable within the Additional Information overlay.  
 The Trigger Action "View" link exposes the trigger action definition in plain English as seen below.

Additional Information

Name: Welcome  
 Category: Other  
 Tracking: HTML & Text  
 Trigger Action: Hide ▲  
 (Any user who updated any attribute of their profile)  
 AND  
 (Who was sent the message "Spring Sale" and clicked one of these links  
 OR  
 Who was sent the message "July Fashions" and clicked one of these links)  
 Deliver To: User who triggers message  
 Delay: None  
 Send Frequency Options: Only once per user  
 Proportional Limiter: None  
 Total Response Limit: None

Close

Alternate values to some of the settings are seen here:

Additional Information

Name: Welcome  
 Category: Other  
 Tracking: HTML & Text  
 Trigger Action: View ▼  
 Deliver To: User who triggers message, email@abc.com, name@abc.com  
 Delay: After 1 day(s), at 12:00pm PST  
 Send Frequency Options: Every time trigger action is satisfied, but no more than once every 14 day(s)  
 Proportional Limiter: Every 4<sup>th</sup> person  
 Total Response Limit: 10,000

Close