Configure Settings for Triggered and SmartBatch Email Campaigns

You can use *Evergage for Email* to create and schedule email messages based on specific triggers like visitor actions, cumulative behavior, or environmental changes or in batches based on select audience segments or all engaged shoppers. You can configure messages to send immediately or to be delivered right away, at a future time, or on a recurring basis such as weekly or monthly.

Before you create a new email campaign, you should confirm that you have the necessary components for the email message including segments, footers, email domain, unsubscribe language, and email send limits. There are several required elements in email campaigns and if you do not include them, you will not be able to save the campaign. These include a campaign name, an experience with either HTML or ADMC code or at least one item block, a footer, and a selected segment of visitors who will receive the campaign.

This Article Explains
This article details the components required prior to creating triggered and SmartBatch email campaigns including segments, footers, email domain, unsubscribe language, and email send limits.

Sections in this Article

- Configure Segments and Item Blocks
- Configure Email Setup
- Verify Domain
- Configure Footers
- View-in-Browser Links
- Import an Unsubscribe or a Subscriber List
- Configure Unsubscribe Settings
- Configure Global Frequency Limits

CONFIGURATION REQUIRED

You must configure the required elements detailed in this article before you can save an email campaign

Configure Segments and Item Blocks

Please refer to the articles on *Segments* and *Item Blocks* for details on creating these components.

Configure Email Setup

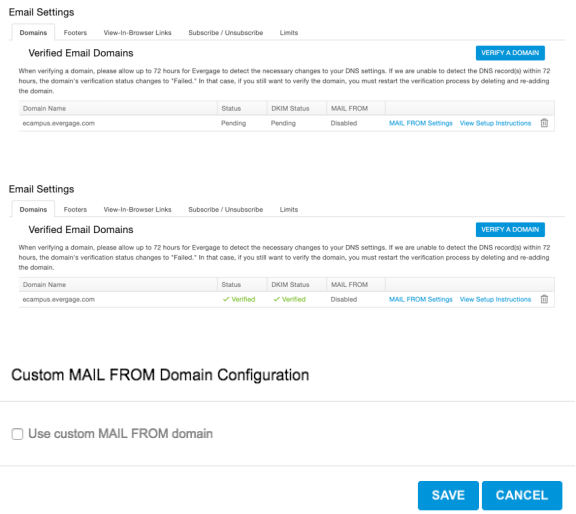
1. Log into the Evergage platform as an Administrator
2. Select **Email**
3. In the *Email Setup* section, select **Email Settings**

Verify Domain

1. In *Email* > *Email Settings*, select the **Domains** tab
2. Click **VERIFY A DOMAIN**
3. Enter the domain or subdomain you will use to send emails
4. Click **ADD DOMAIN**
5. The *Status* will change to **Pending** as Evergage attempts to detect the DNS record. When the domain verification is complete, the *Status* will change to **Verified**

   After 72 hours, if Evergage cannot verify the domain, the **Status** will change to *Failed*. In that event, you can reinitiate the verification process for that domain by deleting and re-adding the domain.

6. Click **View Setup Instructions** and follow the instructions to initiate the domain verification process with *Sender Policy Framework* (SPF) and to enable *DomainKeys Identified Mail* (DKIM). When the verification is complete, the *DKIM Status* will change to **Verified**
7. Both **Status** and **DKIM Status** must be *Verified* before you can send triggered emails



8. Click **MAIL FROM Settings** to *use a custom MAIL FROM domain*. For example, if you verified *company.com* as a domain but wish to send emails from *promotion.company.com*

Configure Footers

The CAN-SPAM Act of 2003 covers commercial email messages in the United States. The European Union has a similar ePrivacy Directive (GDPR). The CAN-SPAM Act requires that all commercial emails include a visible and operable unsubscribe mechanism and a legitimate physical address (or P.O. Box) for the business promoting its product or service, including:

- Company Name
- Company Street Address
- City
- State
- A link to email preferences or an option to unsubscribe from all communications

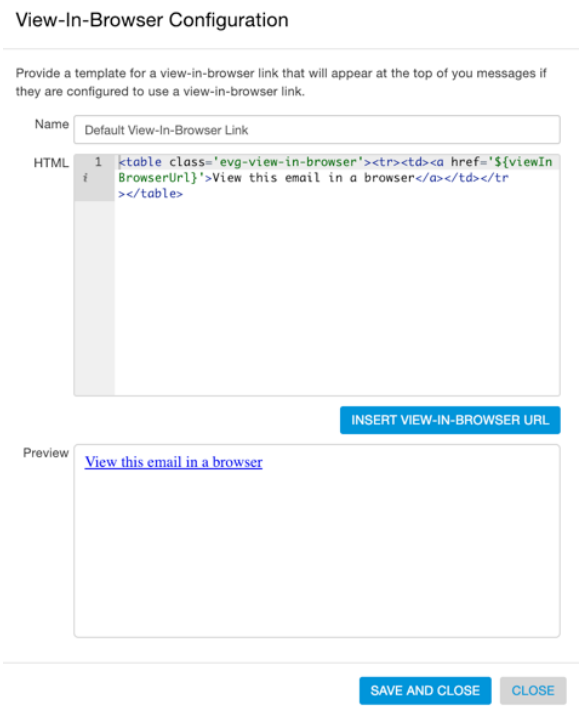
Evergage for Email includes one default footer, which you must customize. Additionally, you can add additional footers in *Email Settings*.

1. In *Email* > *Email Settings*, select the **Footers** tab
2. Edit the default footer:
    a. Click next to *Default Footer*
    b. The *Email Footer* window will open
    c. Make changes as needed including changing the **Name** of the footer
    d. Click **INSERT UNSUBSCRIBE URL** to insert the unsubscribe dynamic field within the **<a>** tag
3. Add a new footer:
    a. Click **ADD FOOTER**
    b. The *Email Footer* window will open
    c. Enter a **Name** for the footer
    d. Enter the **HTML** code for the footer. Click **INSERT UNSUBSCRIBE URL** to insert the unsubscribe dynamic field within the **<a>** tag
4. The footer will show in the *Preview* window
5. Click **SAVE AND CLOSE** to save changes

View-in-Browser Links

Depending on the recipient's email client and the device used to view the email, the recipient might have a better experience viewing the email in a browser. You can add a link to your message to make it easy to do that. *Evergage for Email* includes one default view-in-browser link, which you may customize. Additionally, you can add additional view-in-browser links in *Email Settings*. When you *Create an Email Campaign*, you can select the desired view-in-browser link in *SETUP > SEND OPTIONS*.

1. In *Email* > *Email Settings*, select the **View-In-Browser Links** tab
2. Edit the default link:
    a. Click next to *Default View-In-Browser Link*
    b. The *View-In-Browser Configuration* window will open
    c. Make changes as needed including changing the **Name** of the link
    d. Click **INSERT VIEW-IN-BROWSER URL** to insert the view-in-browser dynamic field within the **<a>** tag
3. Add a new footer:
    a. Click **ADD VIEW-IN-BROWSER LINK**
    b. The *View-In-Browser Configuration* window will open
    c. Enter a **Name** for the footer
    d. Enter the **HTML** code for the footer. Click **INSERT VIEW-IN-BROWSER URL** to insert the view-in-browser dynamic field within the **<a>** tag
4. The link will show in the *Preview* window
5. Click **SAVE AND CLOSE** to save changes



Import an Unsubscribe or a Subscriber List

You can import an unsubscribe or a subscriber list using a special type of manual segment in Evergage, then use that list for Evergage for Email. Refer to *Use Manual Segments to Bring Outside Data into Evergage* for more information on how to create these types of manual segments.

Configure Unsubscribe Settings

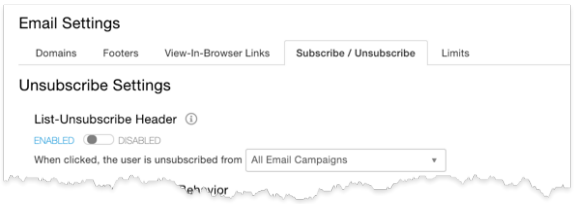
You can make configuration changes in this section to control other unsubscribe settings, including what happens after an email recipient clicks "Unsubscribe" in the header or footer of the message.

- Open Email Setup
- Select options for List Unsubscribe Header
- Select options for Footer Link Unsubscribe Behavior

Open Email Setup

1. Navigate to *Email* > *Email Settings*
2. Select the **Subscribe / Unsubscribe** tab

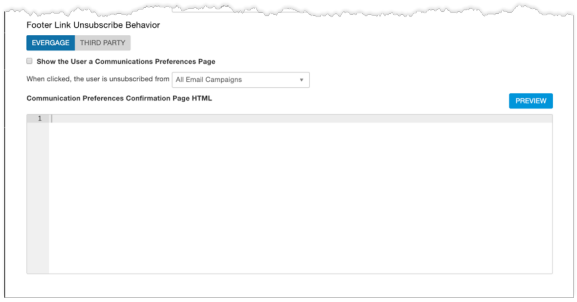
Select options for *List Unsubscribe Header*



1. By default, *Email Client List Unsubscribe* is **Enabled** to include the unsubscribe link in the header of the email. Select **Disabled** if you do not want to include unsubscribe language in the header of the message. Unsubscribe language will still be included in the message footer
2. Select the list from which the recipient will be unsubscribed:
    a. **All Email Campaigns** - recipients who unsubscribe will not receive any future email communications generated from Evergage
    b. **Subscriber List Used By That Campaign** - recipients who unsubscribe will not receive emails from campaigns that use any of the same unsubscribe lists as those the recipient unsubscribed from

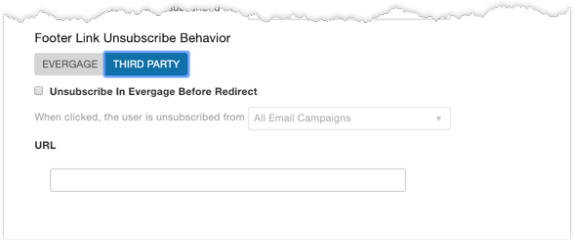
Select options for *Footer Link Unsubscribe Behavior*

Evergage - when selected, recipients will select the unsubscribe type from an unsubscribe page hosted by Evergage



1. If you select **Show the User a Communications Preferences Page**, you can add a custom HTML form to the unsubscribe page that gives recipients a list of unsubscribe options
2. If you *do not* select **Show the User a Communications Preferences Page**, choose the list from which the recipient will be unsubscribed:
    a. **All Email Campaigns** - recipients who unsubscribe will not receive any future email communications generated from Evergage
    b. **Subscriber List Used By That Campaign** - recipients who unsubscribe will not receive emails from campaigns that use any of the same unsubscribe lists as those the recipient unsubscribed from

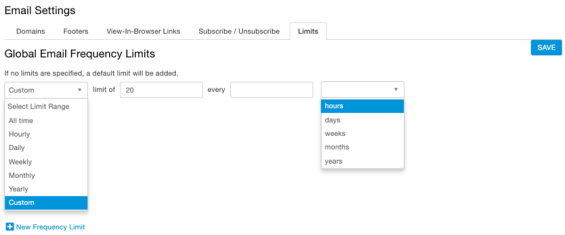
Third Party - when selected, recipients will select the unsubscribe type from an unsubscribe page hosted by you or a third party application.



1. If you select **Unsubscribe In Evergage Before Redirect**, the recipient will be unsubscribed from Evergage campaigns before being redirected to a third party page. Select the list from which the recipient will be unsubscribed:
    a. **All Email Campaigns** - recipients who unsubscribe will not receive any future email communications generated from Evergage
    b. **Subscriber List Used By That Campaign** - recipients who unsubscribe will not receive emails from campaigns that use any of the same unsubscribe lists as those the recipient unsubscribed from
2. If you *do not* select **Unsubscribe In Evergage Before Redirect**, the recipient will be redirected to the third party page, which you add in **URL**. Additional tracking will need to be in place on the third party page to capture unsubscribe events. Please contact Evergage Support for further assistance

> Do not select **Unsubscribe In Evergage Before Redirect** if the Evergage JavaScript Beacon is installed on the third party unsubscribe page. Please contact Evergage Support for further assistance

Click **SAVE** to save any changes

Configure Global Frequency Limits

1. In *Email* > *Email Settings*, select the **Limits** tab
2. Select the **limit type**: all time, hourly, daily, weekly, monthly, yearly, or custom
3. Configure the **limit amount** - options will change based on what you selected for the limit type
4. For *Custom* limits, there are additional frequency options you can set, as shown in the image to the right
5. Click **New Frequency Limit** to configure additional limits. For example, you could set both daily and hourly limits
6. Click **SAVE** to save any changes