

Creating a Triggered Email with an A/B Split

A triggered email is a email that is scheduled to automatically be sent through WordFly based on a specific list of patrons.

These steps are for a production specific triggered email with an A/B list split

Step 1: Update the Suppression File

The suppression file will eliminate anyone that should not receive the email.

1. GoTo > Extraction Manager
2. Open mrs 1415 CSO Triggered Extractions (this is season specific, so make sure you choose the correct extraction)
3. Select the ticket holder segment you want to suppress and update the performance information. For example, if the email is only going to Friday night attendees of a performance, then you would suppress anyone with Saturday tickets to that performance.
4. Add any additional segments that need to be suppressed. NOTE: NONE of these segments should be suppressed in the extraction.
5. Save and Generate Counts
6. Extract to a list for the next step

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag
S01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Inactive	10	10	<input type="checkbox"/>	<input type="checkbox"/>
S02	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Deceased	20	20	<input type="checkbox"/>	<input type="checkbox"/>
S10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do Not Email	30	30	<input type="checkbox"/>	<input type="checkbox"/>
S13	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No Email	40	40	<input type="checkbox"/>	<input type="checkbox"/>
S16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Staff	50	50	<input type="checkbox"/>	<input type="checkbox"/>
S17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Orchestra Members	60	60	<input type="checkbox"/>	<input type="checkbox"/>
S20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Internal/Box Office Accounts	70	70	<input type="checkbox"/>	<input type="checkbox"/>
S23	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Estate Constituent Types	80	80	<input type="checkbox"/>	<input type="checkbox"/>
024	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Summer #4 ticket holders	90	90	<input type="checkbox"/>	<input type="checkbox"/>

Example of suppression segments

Step 2: Setup a List to get the patrons for the A list

1. Tools > List Manager > Create New List
2. Set Criteria as per below screenshot.
3. Update the Attendance Season and performance date to those you want to include in the email. Example: Attendance Season: 1516 CSO Music Hall
4. Seat Event Code: Attended
5. List (name): The suppression list you created in the previous step
6. Random Selection: 0 (this is based on a view that only selects half the list of those who attended)
7. In the OR box the List is Required Internal email list (List #51568)

Criteria	Operator	Value	Search Household
Attendance Season	In	(1 value selected)	<input checked="" type="checkbox"/>
Attendance Performance Date	Between	01/22/2016 and 01/22/2016	<input checked="" type="checkbox"/>
Seat Event Code	In	(1 value selected)	<input checked="" type="checkbox"/>
List (name)	Does Not Have	(1 value selected)	<input checked="" type="checkbox"/>
Random Selection	>=	0	<input checked="" type="checkbox"/>

OR

Criteria	Operator	Value	Search Household
List (name)	In	(1 value selected)	<input type="checkbox"/>

Replace Individuals Add Associations Add Individuals Add Groups *Keep/Replace Original*

Replace Individuals with Primary Household

Leave the individual constituents as selected by the list criteria
 Replace individual constituents with their primary household, if one exists
 Replace individual with household and add all primary affiliates

Reset Delete Show Query Validate Query Manual Edit Close

8. Save the list, select Category and click TMS and Dynamic...THIS IS VERY IMPORTANT. Making the list dynamic allows WordFly to update the list when the email is triggered, otherwise the count will remain static and the email will not be sent to anyone.

Save List

Name:

Category:

Ctrl Grp:

TMS T-Stats
 Dynamic Inactive

You've just created the A list. Now to create the B list.

Step 3: Setup a List to get the patrons for the B list

This set up is basically the same with one list criteria change.

1. Tools > List Manager > Create New List
2. Set Criteria as per below screenshot.
3. Update the Attendance Season and performance date to those you want to include in the email. Example: Attendance Season: 1516 CSO Music Hall
4. Seat Event Code: Attended
5. List (name): The suppression list created in the first step
6. List (name): This second list name is the A list created in the last step. In this case: Email 01.22.16 (CSO#9 FRI A)
7. In the OR box the List is Required Internal email list (List #51568)

Criteria	Operator	Value	Search Household
Attendance Season	In	(1 value selected)	<input checked="" type="checkbox"/>
Attendance Performance Date	Between	01/22/2016 and 01/22/2016	<input checked="" type="checkbox"/>
Seat Event Code	In	(1 value selected)	<input checked="" type="checkbox"/>
List (name)	Does Not Have	(1 value selected)	<input checked="" type="checkbox"/>
List (name)	Does Not Have	(1 value selected)	<input checked="" type="checkbox"/>

OR

Criteria	Operator	Value	Search Household
List (name)	In	(1 value selected)	<input type="checkbox"/>

Replace Individuals with Primary Household

Leave the individual constituents as selected by the list criteria
 Replace individual constituents with their primary household, if one exists
 Replace individual with household and add all primary affiliates

8. Save the list, select Category and click TMS and Dynamic... **THIS IS VERY IMPORTANT.** Making the list dynamic allows WordFly to update the list when the email is triggered, otherwise the count will remain static and the email will not be sent to anyone.

Name: Email 01.22.16 (CSO#9 FRI B)

Category: Email Lists

Ctrl Grp: CSO ALL

TMS **T-Stats**

Dynamic **Inactive**

Save **Cancel**

The B list has now been completed.

Step 4: Send information about email to Email Task Force group

1. In the email include the following:
 1. Name: (email name)
 2. Appeal: (whichever one is appropriate)
 3. Source: Default
 4. QTY: which will be 0

Technical info:

View information set-up for T_KEYWORD

Description	Random Selection
Data Type	Number
Edit Mask	Number
Detail Tbl	LV_RANDOM_CONSTITUENTS
Detail Col	!.customer_no
Category	Constituent
Use For List	List Only
Primary Group Default	Default Value No