

Creating a Triggered Email

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 producing a specific triggered email.

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: Set up a list to get the patrons you do want

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.
4. Seat Event Code: Attended
5. List (name): The suppression list you created in the previous step
6. 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 type="checkbox"/>
Attendance Performance Date	Between	02/19/2015 and 02/19/2015	<input type="checkbox"/>
Seat Event Code	In	(1 value selected)	<input type="checkbox"/>
List (name)	Does Not Have	(1 value selected)	<input 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

Delete

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

Show Query
Validate Query
Manual Edit

Close

7. 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: Email 02.19.15(CSO#13 Trigger)

Category: Email Lists

Ctrl Grp: CSO ALL

TMS **TStats**
 Dynamic **Inactive**

Save Cancel

Step 3: 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

Creating a Triggered Email with Multiple Criteria Sets

A triggered email is an 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 multiple criteria lists

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. NOTE: None of these segments should be suppressed in the extraction.
4. Save and Generate Counts
5. 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: Create an Extraction for your Inclusions

The extraction will allow you to pull all of the specific criteria in and suppress one set from the next.

1. GoTo > Extraction Manager
2. Open a new Extraction
3. Import tlw 1718 CSO #1 Fri Trigger or tlw Pops #1 Fri Trigger depending on the show (these will give you a starting point to create your extraction)
4. Keep the standard suppressions that are included
5. Be sure to suppress the other dates for the performance
6. The first inclusion is anyone who has tickets for the upcoming performance that is being targeted
7. The second inclusion is anyone who has tickets later in the season who also has tickets for tonight's performance (list mrs 1718 Ticket Buyers 2+, this list must be regenerated for each weekend and the future date must be the day after the performance weekend you are targeting)
8. The third inclusion is anyone who has had ticket activity in the last three years who also has tickets for tonight's performance but nothing else for the season (list tlw 15-17 Tix CSO/Pops)
9. The fourth inclusion is any NTS buyers for tonight's performance (run from the NTS report) or anyone who has no ticket history for the last three years who also has tickets for tonight's performance (list mrs No tix history last 3 yrs)
10. Save and Generate Counts
11. Spot check Segment Contents for each segment to be sure the correct criteria has been pulled

S01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Inactive	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	87,888	87,888	
S02	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Deceased	20	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	125	125	
S10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do Not Email - All	30	30	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	37,472	31,285	
S16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Staff	40	40	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	193	161	
S17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Orchestra Members	50	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	201	150	
S20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Internal/Box Office Accounts	60	60	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	150	90	
S22	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dummy Constituent Type	70	70	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	1,147	1,032	
S21	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organization Constituent Type	80	80	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	11,536	8,105	
003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pops #1 Fri or Sun	90	90	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	3,445	2,881	
002	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	American Originals	100	100	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	3,970	1,573	1,573
005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1718 Ticket holders	110	110	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	1,536	192	192
004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Has Tx last 3 years BNTY	120	120	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	1,592	128	128
006	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Didn't have tix last 3 yrs	130	130	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	271	179	179

Example of segments

Step 3: Save each segment to a separate list following the naming conventions of the segments in the extraction

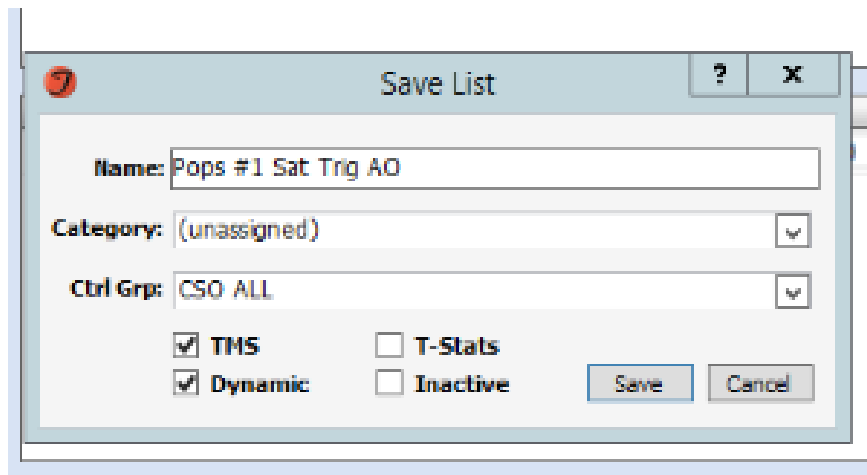
186940	TWilliam	10/13/2017 11:09	Sat Trig no 3 - NTS	179	<input type="checkbox"/>	<input type="checkbox"/>
186939	TWilliam	10/13/2017 11:09	Sat Trig 3yr - no 1718	128	<input type="checkbox"/>	<input type="checkbox"/>
186938	TWilliam	10/13/2017 11:08	Sat Trig 1718 Tx	192	<input type="checkbox"/>	<input type="checkbox"/>
186937	TWilliam	10/13/2017 11:08	Sat Trig AO	1573	<input type="checkbox"/>	<input type="checkbox"/>

Step 4: Create a list for each segment by each performance (in a 2 show weekend you will have 4 lists, in a 3 show you will have 12, etc.)

Pops #1 Sun Trig AO				?
Criteria	Operator	Value	Search	Household
Attendance Season	In	(1 value selected)	<input checked="" type="checkbox"/>	
Attendance Performance Date	Between	10/15/2017 and 10/15/2017	<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)	In	(1 value selected)	<input checked="" type="checkbox"/>	
OR				
Criteria	Operator	Value	Search	Household
List (name)	In	(1 value selected)	<input type="checkbox"/>	

1. Attendance season is tonight's show's season
2. Performance date is tonight's date
3. Seat Event Code is Attended
4. List **DOES NOT HAVE** the current season's suppression list created from Extractions
5. List **IN** the list you created from Step 1 (Use 1 list or each trigger list you create)
6. Bottom segment List **IN** ReqInternalEmailRecipients

7. 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.



Step 5: 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

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: Email 01.22.16 (CSO#9 FRI A)

Category: Email Lists

Ctrl Grp: CSO ALL

TMS T-Stats
 Dynamic Inactive

Save Cancel

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