How to Use Campaign Builder

08/05/2025 10:15 am EDT

Before You Begin...

Use the Email Campaign Builder Checklist to make sure you're ready to create your campaigns. Make a copy of the checklist and fill it out with the necessary information, then return to the guide.

What is Campaign Builder?

Campaign Builder allows you to create, schedule, and launch a campaign by pulling in experiences in Audience Builder and Visual Template Editor (VTE), while setting custom recommendation rules and personalized product rules for each email sent to customers.

With Campaign Builder, you can create the following types of email campaigns:

- Promotional or batch marketing campaigns which are sent to a list of people. Batch campaigns are sent one time.
- Triggered campaigns, which are more targeted messages that send to select individuals after they've engaged with your retailer.
- Transactional campaigns, which can notify customers after they've made a purchase, or when their item has shipped.

Marketing vs Transactional Campaigns

Marketing campaigns are outreach to get a customer to engage, interact, or purchase something from the retailer.

Transactional campaigns add to an established relationship or provide information on a previous transaction, such as back in stock email, order confirmation, or shipping notification. At Bluecore, a welcome email sent immediately after submission would also be considered transactional.

Campaign Types

Custom campaign

Custom campaigns have all the same settings as a Smart Campaign and include additional product block rules that aren't available with any other campaign type.

Once you make a Trigger or Smart campaign, you can't change it to Custom. If you're unsure on which type to use, choose Custom for the most hands-on control.

Trigger campaign

If you want a simple campaign triggered by one specific action, choose a Trigger campaign.

Trigger campaigns require that you use one of the following pre-built audiences, or triggers:

- **Abandoned Cart**
- **Abandoned Product**
- **Abandoned Search**

- **Post Purchase**
- **New Arrivals**
- **Price Decrease**

Trigger campaigns will create an ideal audience specifically for that type of campaign. If you select a Trigger campaign and choose one of those pre-built audiences, you can’t create a custom audience to attach to the campaign - instead you’re relying on Bluecore’s best practices to make the audience for you.

You also can’t edit or add an audience after it’s been built - any preferred audience changes would mean you need to restart the campaign and build from scratch.

Smart campaign

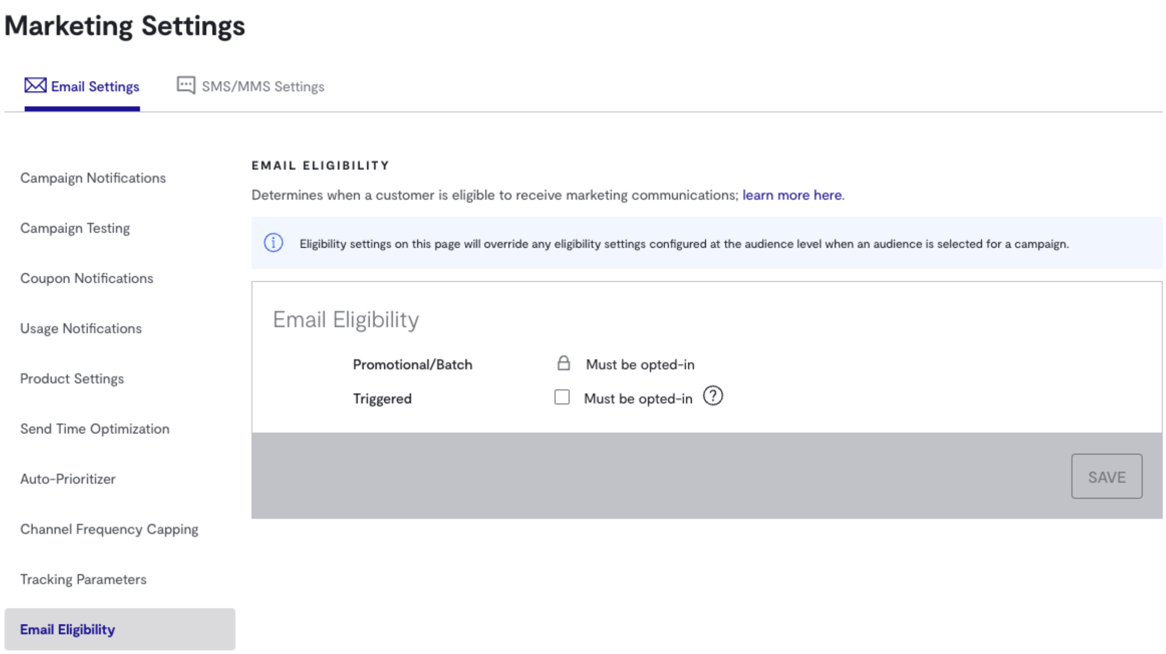
Smart Campaigns are best for batch campaigns sent to large audiences.

A Smart Campaign offers personalization, such as including the customer’s name in the subject line or displaying products and recommendations using Smart Content. But like Trigger campaigns, you can't fine-tune your settings as much as you can with a custom campaign.

Promotional/Batch or Triggered campaigns

Promotional/Batch is for emails that aren’t targeting specific customers based on an action they’ve taken, whereas triggered emails send on a cadence after a customer takes an action.

This choice is impacted by an option in Marketing Settings - Email Eligibility. Click the **Flag**, then **Settings** to find it.



Any campaign labeled as a Promotional/Batch will only send to users who have explicitly opted-in to your marketing messages. That setting is locked and can’t be changed.

If the Triggered box “Must be opted-in” is not checked here, all known and opted-in users will receive Triggered campaigns. This means if you select Triggered on your campaign setup page, you’ll reach a larger audience than if you select Promotional/Batch on the campaign setup page.

Promotional/Batch is for emails that aren't targeting specific customers based on an action they've taken. Triggered emails will send on a cadence after a customer takes an action.

If Triggered is checked in Marketing Settings, the only difference between choosing Promotional/Batch or Triggered in the campaign setup is with analytics - once the campaign is launched.

Personalized Product Rules

After you select your campaign template, you will be prompted to add rules for each product block that's in your template.

There are several rules available to add products to product blocks. Learn more about each one below.

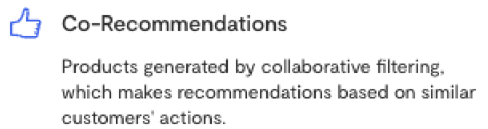
Interaction History

This shows products the customer interacted with, depending on the campaign's associated audience.

This rule will also have a different name depending on the audience. For example, with a Cart Abandon campaign, it displays as **Show products the customer added to cart**

You can choose to display up to 16 products.

Co-Recommendations



This block recommends products that are the most viewed, the most added to cart, the most purchased, or the most searched by all customers on the site.

You can also add other filters, such as color, brand, or price.

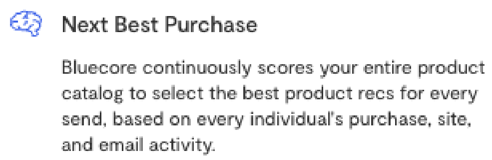
You can choose to display up to 16 products.

New Arrivals

This shows the newest products in a specific timeframe of the last 24 hours, 7 days, or 30 days.

You can also narrow the recommended products to be in the same category as what the customer interacted with, custom criteria, or all products on the site.

Next Best Purchase

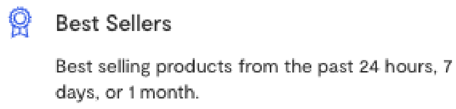


This block displays the next products a customer will most likely purchase by using Bluecore's machine learning algorithm, which takes in customers' purchase, site, and email activity.

You can adjust how many products it shows to customers, whether it shows products matching the customer's top category, and add your own custom criteria for the products.

WARNING: Do not both check the Category Specific box and add a custom category criteria. This will only show that category to customers who also have it as their top category.

Best Sellers



This shows the best selling products within a specific timeframe of the last 24 hours, 7 days, or 30 days. You can also narrow the recommended products to be in the same category as what the customer interacted with, custom criteria, or all products on the site.

Dynamic Products from Catalog

This block allows you to be very intentional about the products shown to customers. You can set custom criteria, such as color, brand, or price or show specific products by adding the IDs.

You can also adjust the number of products it shows, and how it sorts the products within the block, then preview the block before applying it.

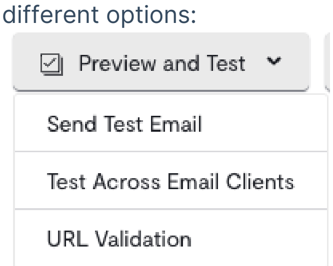
Fallback options

No matter what rule you choose, make sure you're OK with the selected fallback option. With the default fallback, "Do Not Send Email," if there aren't enough items to fill a block, the email will not be sent.

You can have multiple fallback options to make sure the email goes out to as many people as possible.

Previewing and testing your campaign

When you're finished building your campaign, select **Preview and Test** to test your campaign. There are a few different options:



- You can select **Send Test Email** to send a test version of a random email to your email address.
- Choosing **Test Across Email Clients** shows what the email will look like on different devices. such as Android or iPhones, operating systems, like Android 13 or iOS 15, or email clients, like AOL or Gmail.
- **URL Validation** shows every URL in the email, so you can see if there are any issues and ensure every URL goes to the expected page.

How to build an email campaign

To create an email campaign, complete the following steps:

1. Hover over the flag icon in the sidebar menu and select **Automated Campaigns** or **One-Time Campaigns**, depending on the type of campaign you want to create. The list of Communicate Campaigns displays.

   If the campaign is firing once, such as announcing an upcoming Labor Day sale, use a one-time campaign. If you want the campaign to send more than once, perhaps for customers who abandoned their cart, you need an automated campaign.

2. Select +**New** > **Campaign** > **Email**. You'll be prompted to select a campaign type.

3. Choose between either a Marketing or Transactional campaign. The campaign type selection displays.

4. You'll be prompted to select between Custom, Smart Campaign or Trigger. When finished, select **Create**. The campaign is created and the Custom Automated Settings page displays.

5. Where it says Untitled Campaign, add a unique name for the campaign, such as "Cart Abandonment."

6. Choose between Promotional/Batch or Triggered campaign

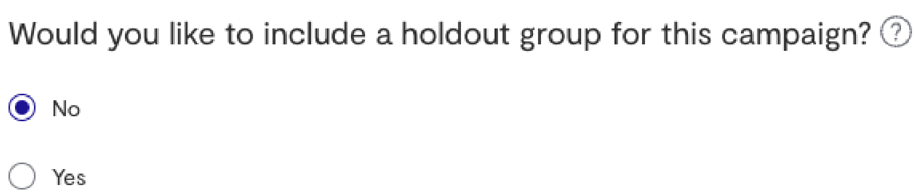
7. Add up to 10 audiences that you want to target for this campaign, and up to 10 audiences that you want to exclude from receiving this campaign.

   > ⓘ If you add more than one audience, the campaign will send to customers that meet any of the audience criteria, not all of them.

8. Choose whether you want this campaign to send to everybody in the selected audience, regardless of the frequency cap and Auto Prioritizer options found in Marketing Settings. For example, the default settings prevent customers from receiving more than one campaign in a 4-hour period. Selecting **Yes** here will ignore those settings and send this campaign to everybody in the audience, regardless of when they last received a campaign.

   The exception to this setting is a hard limit of one email per hour. Customers won't receive more than one email per hour, regardless of frequency settings or campaign options.

9. Choose if you want a holdout group for the campaign. A holdout group is a selection of the audience that would ordinarily receive the campaign, but will instead not receive it. This can be useful for measuring the effectiveness of the campaign against a control group.

10. Select when you want to send the campaign. If it's an automated campaign, you can set the cadence of the email series, either hourly, daily, weekly, or monthly. Depending on the cadence, you can adjust when the campaign will repeat. For example, if you set the campaign to send once a day, you can adjust what time it sends. If you choose once a week, you can choose what day of the week.
    If you're working on a one-time campaign, you can choose the exact date and time for the campaign to send.

11. Choose what email service provider you want to send your campaign through - either Bluecore or Salesforce Marketing Cloud.

12. Select **Save & Continue** to move to the Message step.

13. On the Message step, choose between a regular campaign or an A/B Test. If you choose an A/B Test, you can set the A/B Test Name, Test Type, Winning Criteria, and Test Description.
    Then, name each variant and add more as desired.
    When making an A/B Test, do not change more than one element of the campaign at a time. You could test the subject line or the recommendation strategy, but don't test both in the same A/B Test, because you won't be able to attribute the performance change to one specific part of the test.

    > ⓘ A Maximum of five variants is supported.

14. Either as a Regular campaign or A/B Test, add an email subject. You can add emojis with the smiley face.

    > ⚠ Not every emoji renders on every device in the same way. To see if the emoji you chose looks correct, you can test your email across email clients.

15. Click + to add customer attributes. This will use known data from the customer to personalize their email, meaning the subject line could say "Hey, Jennifer! You left something behind in your cart!" to somebody named Jennifer. You can insert customer attributes such as cart total, gender, name, and others, and choose how you want to format it.

    > ⓘ Be sure to include a fallback, so if the name isn't available the email could display "Hey, you!"

16. If you are using VTE to build your template, enter the preview text. If you want to customize the preview text, first add a template at the bottom of the page. You can also add emojis or customer attributes to the preview text.

17. The default tracking parameters created in Marketing Settings. You can add more by clicking **+ Add tracking parameter**, delete any parameters, or edit existing ones.

18. Add a template, either a pre-built one, or copy a template from an existing campaign, depending on

how you want the campaign to look. You can also create a new template using VTE, or code editor.

19. Once you've selected your template, you'll be brought into VTE to edit it. Once you're satisfied with how it looks, click **Finish and Close** to return to the Campaign Builder.

20. With the template loaded in the campaign, add any personalized product rules to product blocks in the template.

21. If the template you selected has a coupon code, choose from which coupon bank the code is pulled from.

22. Once you're finished with the Message step, click **Save & Continue** to move to the summary step. You can also convert this campaign into a journey using Experience Designer by clicking **Create Journey**.

23. Once on the Summary step, you can test your campaign before it launches. Click **Proofs and Preview** to see examples of the campaign that would go out to specific customers. View the proofs to make sure the email is rendering properly and the URLs are links as expected.

24. To test your campaign, you can also select the **Proofs and Preview** button.

25. In the Summary step, you can see all the settings from the previous two steps. Click **Edit** to be taken to that section and make a change as needed.

26. When you're ready, select **Save & Launch Campaign** to begin the campaign.