Email Halt Observability

06/25/2025 1:26 pm EDT

Halts occur when an email campaign *just doesn't send.*

Halts are further described here and referenced in relevant articles such as:
- Email Volumes and Halts Troubleshooting
- Product Recommendations Overview

The Bluecore Email Halt Observability capability is to reduce occurrences of the negative outcomes described in the articles above as they specifically relate to failing product recommendation blocks in email campaigns.

PRODUCT RECOMMENDATION BLOCK FAILURES

One reason a single customer, an entire audience or a subset of that audience may fail to receive a campaign is due to an assigned product recommendation strategy failing to find enough products to meet the requirements for sending the message.

This historically has shown up in subtle ways (e.g. proofs failing to load) prior to launch or delivery of a campaign or in more consequential ways after delivery (e.g. no or low delivery to the intended audience)

The introduction of Bluecore Email Halt Observability proactively checks every both:
- expected reach
- underlying cause(s) of restricted reach

This information is then presented in an actionable way within the context of the workflow at the time of campaign configuration & launch.

RESTRICTED REACH WARNING BANNER

This will appear on the campaign summary page when the expected audience reach falls below 95% (i.e. the restricted reach of the campaign is 5% or greater) and will display an estimated percentage of the audience that will not receive the campaign.

If the reach of the campaign is better than 95%, no warning banner will appear.

For campaigns that are configured with an A/B test, this check will be done on a per variant basis so reach and underlying reasons for failure will be displayed with each of the active variants in the test.

For Experience Designer campaigns, this check will be done on a per touch basis and so reach and underlying reasons for failure will be displayed with each of the active touches in the journey.

RUN CHECK & REFRESH AUDIENCE BANNERS

These banners can appear on the campaign summary page and proof pages and will display when the sample of customers captured from the campaign has aged beyond 7 days. Bluecore uses these audience samples to check recommendation efficiency and to generate proofs.

Upon clicking 'Run Check' or 'Refresh Audience', the attached audience(s) will be rerun to generate a new sample of customers that will be a closer representation of the audience that the next live send will deploy to. This process can take a while, but the UI will display progress to assure you that everything is working as expected.

In the event of an issue, a message dialog will appear giving you the option to try refreshing the audience(s) again or to simply proceed using the previously saved audience sample.
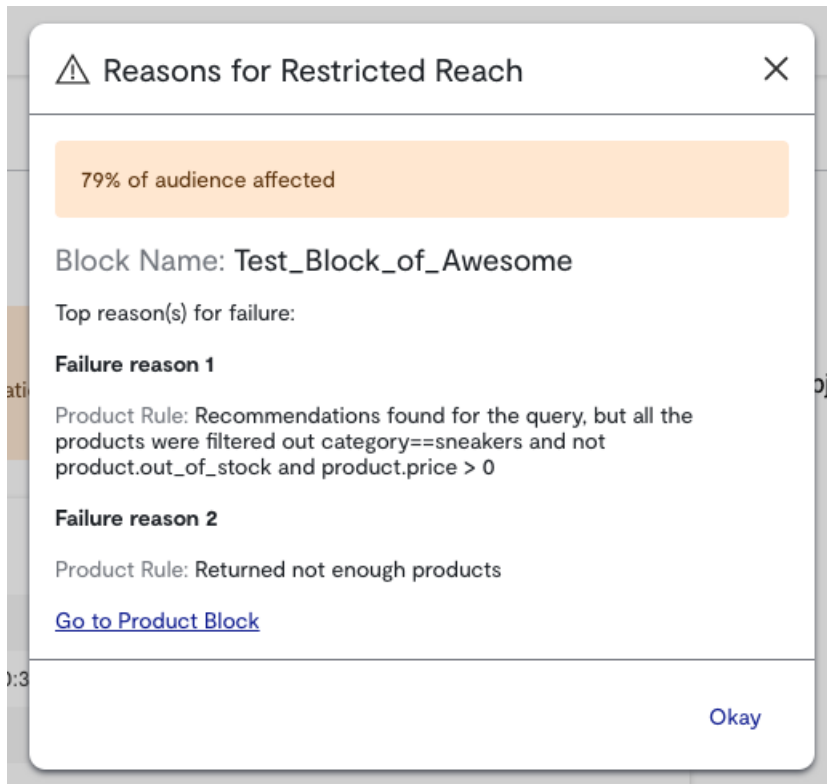
SEE REASONS

When the warning banner does appear, a See Reasons button is also displayed along with the estimated reach impact of the recommendation failure. When clicking this button, a modal will open that provides more details on the underlying cause(s) of the recommendation failure(s).

This includes:
- the block name
- up to 3 stack-ranked failure reasons by assigned strategy
  - Product Rule (the primary strategy that was assigned)
  - Fallback Rule 1
  - Fallback Rule 2

For additional definitions and action to consider, please see Failure Reasons & Resolutions.

When the campaign is in a draft state, each individual block that is seeing failures will also include a link back to the relevant product block that needs attention prior to publishing.

If no action needs to be taken, clicking the X or the Okay link will close out the modal and you will remain on the campaign summary page.

GO TO PRODUCT BLOCK

When clicking the Go to Product Block link within the See Reasons modal, you will be directed back to the relevant product block configuration modal on the message tab of the campaign draft.

Using the guidance provided in the reason model itself and/or combining with the glossary, make the appropriate changes to the product block requirements and then click 'Apply Rule'.

After clicking 'Save & Continue' to navigate back to the summary page, a fresh check will be completed

against the audience and updates rules configuration and disappear entirely if the issue has been resolved (i.e. reduced restricted reach to less than 5%) or display the banner again with the latest restricted reach estimate and underlying failure reasons.

This can be repeated as many times as needed to validate new configurations or revalidate existing configurations.

PROOFS
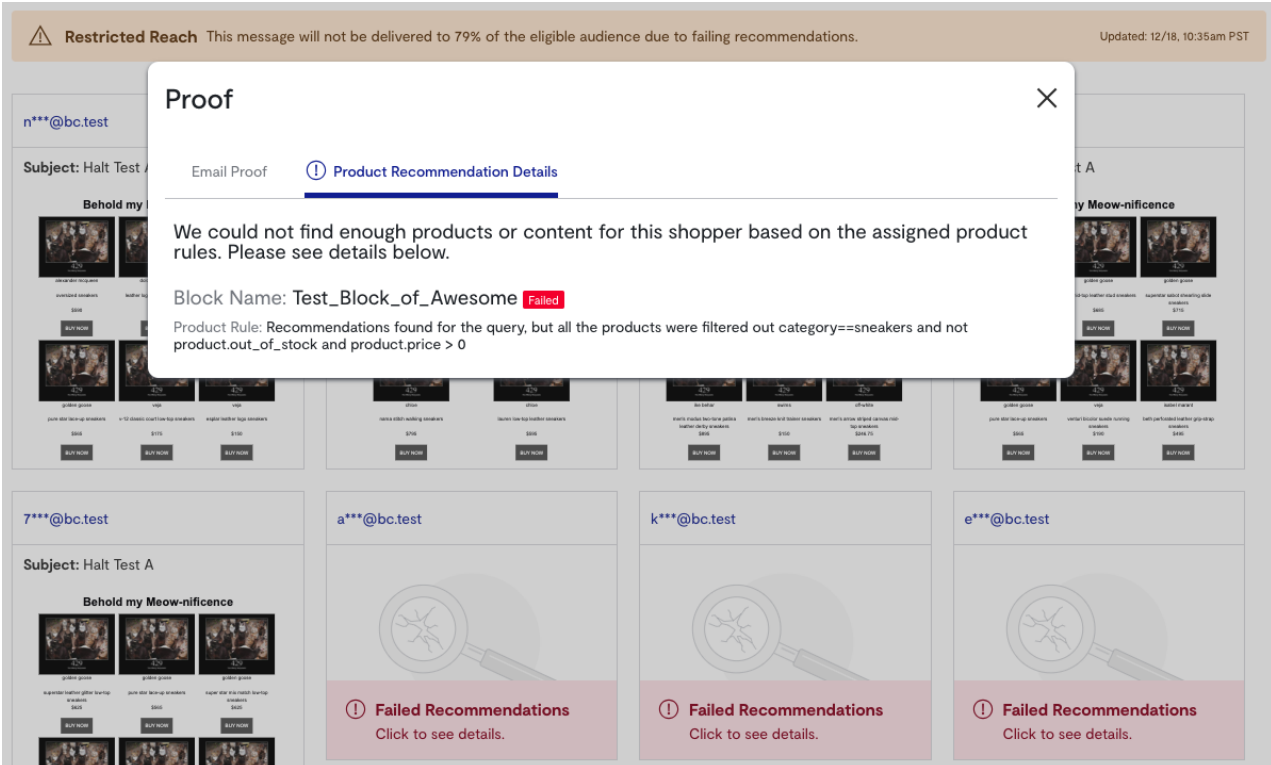
From the campaign summary page, clicking the View Proofs button will also provide visibility into the success or failure state of individual customers.

As always, you will see examples of emails that are rendering successfully and the personalized content for each customer for further aesthetic validation. In addition, you may also see examples of failed proofs where those that are failing specifically due to product recommendations are clearly labeled as so.

When clicking a proof that is showing a Failed Recommendations banner, you will be directed to the underlying reason the product recommendations for this specific customer failed.

The presentation of this information is similar to the See Reasons details but in this case is limited to the individual proof that is being viewed.

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- the block name
- up to 3 stack-ranked failure reasons by assigned strategy

- Product Rule (the primary strategy that was assigned)
- Fallback Rule 1
- Fallback Rule 2

For additional definitions and action to consider, please see Failure Reasons & Resolutions.

A/B TESTS

When an A/B test is active and product recommendation blocks are used across variants any potential failure at a variant level will also be flagged on both the summary and proof pages of a campaign.

This is denoted via an orange dot overlaying any affected variants as shown in the examples below and the same information as described above can be accessed.

FAILURE REASONS AND RESOLUTIONS

Below is an outline of potential reasons for campaign reach restrictions which can appear either individually or in combination. Each reason is accompanied by recommended action(s) to consider (in the context of the overall campaign strategy) in order to regain lost reach.

If additional support is needed to address a specific failure reason or a failure reason or reasons are recurring across many campaigns at once, please contact support to assist with resolution.

Failure Reasons	Potential Resolution Path
Could not find input product(s) from product-related events within the audience.	Update the audience or change to an audience that includes some form of behavioral criteria such as did view product or did purchase.
Could not find search term(s) from product search-related events within the audience.	Update the audience or change to an audience that includes criteria for did search.
Products were disqualified based on product filtering criteria. (1)	Reduce or remove the filtering criteria that is currently applied, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.

Products were disqualified based on product filtering criteria. (2)	Reduce or remove the filtering criteria that is currently applied, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Could not find minimum number of products required for product block.	Reduce minimum product count that is currently applied, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Products were out of stock.	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Did not find enough results to satisfy product filtering criteria {attribute list} and minimum threshold for product block.	Reduce or remove the filtering criteria and/or reduce minimum product count that is currently applied, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Input product(s) from product-related events within the audience did not satisfy product eligibility criteria. (1)	Change recommendation strategy.
Input product(s) from product-related events within the audience did not satisfy product eligibility criteria. (2)	Change recommendation strategy.
Input product(s) from product-related events within the audience did not have valid images.	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Input product(s) from product-related events within the audience did not have valid URLs.	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Input product(s) from product-related events within the audience did not have valid names.	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Input product(s) from product-related events within the audience were temporarily ineligible while revalidating URLs.	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Products were disqualified based on global product exclusion settings.	Change recommendation strategy, add a fallback recommendation strategy, change to 'Do Not Show Product Block' or consider updating global product exclusion settings (Communicate > Settings > Product Settings > Product Exclusions).
Could not find minimum number of products required for product block due to unique product settings.	Change property that unique products are based on, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Could not find email address(es) from the audience.	Change to an audience that uses email address as the identifier.
Could not find required customer attribute(s) in the audience. (1)	Change recommendation strategy or add/update appropriate customer attribute values via customer data one-time file import.
Could not find required customer attribute(s) in the audience. (2)	Change recommendation strategy or add/update appropriate customer attribute values via customer data one-time file import.

A value for query_values_attribute is empty which is causing a failure to occur. If the issue persists, please contact support for resolution.	Change recommendation strategy.
A value for query_values_attribute is not formatted correctly which is causing a failure to occur. If the issue persists, please contact support for resolution.	Change recommendation strategy.
Products found were already used in other product blocks. (1)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Input product(s) available from product-related events within the audience did not exist in the catalog.	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
No results were found. (1)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
No results were found. (2)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
No results were found. (3)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Unexpected error occurred. If the issue persists, please contact support for resolution. (1)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Unexpected error occurred. If the issue persists, please contact support for resolution. (2)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Unexpected error occurred. If the issue persists, please contact support for resolution. (3)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Products found were already used in other product blocks. (2)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Unexpected error occurred while sorting results. If the issue persists, please contact support for resolution.	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Custom indexing requirements could not be satisfied. If the issue persists, please contact support for resolution. (1)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.
Custom indexing requirements could not be satisfied. If the issue persists, please contact support for resolution. (2)	Change recommendation strategy, add a fallback recommendation strategy or change to 'Do Not Show Product Block'.