Sending a Transactional or Real-Time Welcome Campaign with Bluecore Site

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Before sending a transactional or real-time welcome email campaign from a Bluecore Site email capture campaign, there are a few steps that need to be completed to ensure the integration is set up.

> The below process outlines what is necessary to send a transactional or real-time welcome email triggered from a Bluecore Site email capture campaign. The below steps have different requirements than setting up a regular transactional or real-time welcome campaign that are outlined here.

Getting started

In this section, learn more about the technical process to setting up Bluecore's transactional messages or real-time welcome. If you have previously integrated transactional email campaigns, some of the below steps may already be completed.

Before getting started, please review the below tasks at a high-level, as they are explained in further detail in the respective sections. The following tasks *must be completed in chronological order.*

Bluecore provides

Before you begin the transactional integration setup, Bluecore will provide the following two resources:

1. API Key: This is your unique API key provided by Bluecore to setup the transactional API calls. Please provide this API Key to the IT team. This API key will need to be configured in the next section by your IT team.

> Bluecore provides the API key, you must set up the API calls.

2. DNS Documentation: Creating a specific domain dedicated to transactional or real-time welcome campaigns. This step is not required if you're only setting up a real-time welcome campaign.

- **NOTE**: Bluecore provides the documentation, you must set up the DNS settings.

Customer to-do

If you've previously integrated with Bluecore and are sending transactional or real-time welcome campaigns, the next step should already be completed from a previous integration. However, check to be sure this integration is already complete.

IT setup

1. **DNS Settings/Sending Domain**: As mentioned above, it's important to create a specific domain dedicated to sending transactional or real-time welcome campaigns. This process is similar to warming-up an IP specific to marketing messages, as a specific domain must now be created for transactional messages. After the domain is configured, the from name and email address are used in the next step to set up the integration within Bluecore.

> ⓘ This step is not required if you're only setting up a real-time welcome campaign.

2. **API Key**: Use the API key to configure transactional or real-time welcome email payloads to send to Bluecore using the API. Read more about Bluecore's transactional API documentation here. If you're using Bluecore Site, the API setup for the welcome email from that source will not be required. Any other welcome email sources will need to be triggered by an API call.

> ⓘ This is technical documentation that must be completed by an IT resource. It includes adding the API key, setting up an API verification with Bluecore, and adding the campaign IDs for the relevant transactional messages into the configured API.

Marketer setup

The following bullets can be completed by a member of your email marketing team. Please provide the following information to Bluecore.

- **Estimated Volume/Day**: Similar to an IP warm-up process, the newly configured domain that will be used for sending transactional messages must also be warmed-up if a higher volume is expected to protect the IP reputation. Please provide an estimated volume per day count to Bluecore to determine if a warm-up is necessary.
- **Historical Opt-in List**: If you're setting up welcome campaigns with the Transactional API, please provide a list of opted-in email addresses to Bluecore that should be excluded from the transactional campaigns. This is used to identify if customers received a welcome campaign prior to sending these emails with Bluecore, so they will not receive the welcome campaign again. This step *must be completed upon an initial migration to Bluecore*

Integrate with Bluecore

MARKETER SETUP

After the above steps have been completed, the next step is to set up a transactional integration within Bluecore.

> ⓘ This integration must be set up with someone who has Client Admin access within Bluecore.

Follow the steps outlined in this article to set up a transactional integration within Bluecore. You will need your API key (previously provided by Bluecore) to setup this integration.

Set up the campaign

Marketer setup

After you've set up the transactional or real-time welcome email integration, the next step is to build out the actual email campaign that will be sent.

In this step, you'll configure the applicable campaign settings, set up the message, add the applicable dynamic parameters and code snippets for the email campaign, and locate the campaign ID that is needed for the API calls.

Follow this article for step-by-step instructions of how to set up a transactional email campaign with the applicable code snippets.

Bluecore services

If you're using Bluecore's production services to set up your transactional or real-time welcome campaigns and templates, you do not need to complete the step-by-step directions outlined in the article that's linked above. In order for Bluecore to complete this setup for you, please provide us with the following items.

- Complete the template links and rules form: Bluecore will send you a copy of our campaign specification document. Complete this document that explains the objectives of this email campaign, including the applicable photoshop files with layout markings.
- Content for the transactional or real-time welcome email: Provide Bluecore with the applicable Photoshop, JSON, and annotated image files that will be used for the transactional email campaign or the Photoshop file for a real-time welcome campaign.

Once Bluecore has received the above files, we will begin the production of the email template and will let you know once it has been completed.

Connecting the campaign to Site

Once a visitor has subscribed, you may want to trigger a real-time welcome email confirming their subscription, sharing an offer code, or simply welcoming them to your brand. If you are already sending your real-time welcome campaign with Bluecore, follow the below instructions.

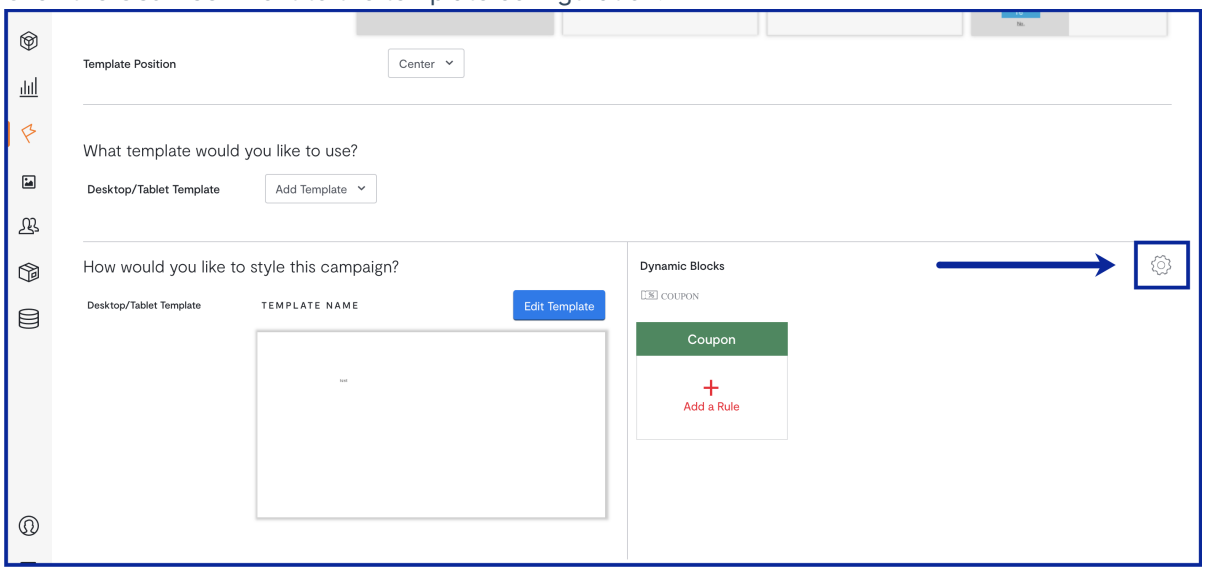
Before getting started, be sure to have already set up a transactional welcome campaign. Once you have a transactional campaign, connect your Bluecore Site campaign to the transactional campaign by following the below steps.

If you are not using Bluecore as your primary ESP, you can select to send this campaign through SFMC or Responsys.

1. Select a previously configured **Bluecore Site campaign**. Please be sure the campaign has been set to inactive in order to edit it below.

2. Navigate to the **Message tab**.

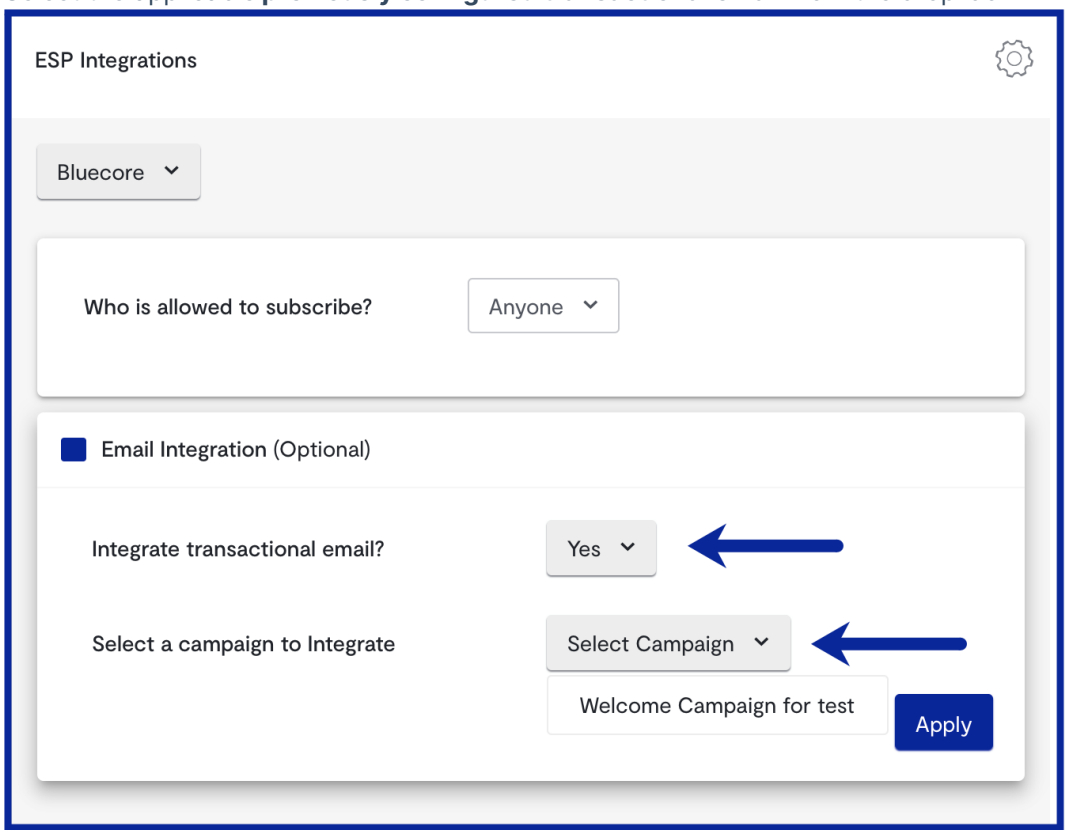
3. Click the **Gear Icon** next to the template configuration.



4. Select **Bluecore** from the ESP integrations drop-down.

5. Select who is **allowed to subscribe** to this campaign.

6. Select to integrate a **transactional email**.
7. Select the applicable **previously configured transactional email** from the drop-down menu.



8. Click **Apply**.
9. Click **Save & Continue** in the lower right-hand corner.
10. Then, **launch** the campaign!

Proof and publish

Run a proof of the content and do a final check of the content, then click Save and Publish to set the transactional campaign live! Publishing the campaign allows the transactional or real-time welcome email to be ready to receive requests via the API.

Quality assurance (QA)

Marketer setup

Follow the steps in this article to learn more about how to do a QA check on your transactional or real-time welcome email campaign. It's recommended that a member of your IT team completes this setup, as it requires a highly technical skillset.

Additional considerations

- Real-time Welcome or Transactional emails are sent in real-time through the API, therefore customers become opted-in at the time of the send.
- The email eligibility status for customers that signed up through the on-site popup is opted-in.

- If you're building a journey, the journey cannot start off with the transactional email. This can be accomplished by applying an audience that looks for customers who have received that email and the journey can start there.