

How to...

AUTOMATION TRIGGERS



How to... Triggers

This guide covers the definition of 'Trigger' along with an overview of each Trigger Type, its Properties and examples of how they can be used.

What is a Trigger?

Each Step of your Automation has a Trigger. A Trigger can be a date, an Administrator action or a Contact action. When a Contact in the Audience of your Automation meets the criteria of a Step's Trigger, an email is sent to that Contact.

Trigger Type: Contact Added to Audience

This is triggered when a Contact is added to your chosen Audience (be it a Group, Segment or All Contacts) by one of the following 5 means:

1. **Manually Added**

When you fill in a Contact Card manually in your NewZapp Account.
This only counts for new records, not updating an existing Contact.

2. **Imported**

When you import a file of Contacts into your Audience.

This might be new Contacts who have never been in the account prior to import, or existing Contacts being imported into the specific Audience for the first time.

3. **Opted-in**

When a Contact manages their Preferences and Opt-in to a Public Group, and that Group is your chosen Audience.

4. **Signed Up**

When a Contact signs up to your Audience via a form on a webpage.
This includes signup which uses Double Opt-in confirmation.

5. **Via API**

When a Contact is added to your Audience via an application using our API.

This Trigger type is useful for Welcome, Signup or Onboarding Automations, or any Automation that reacts to a new Contact.

Trigger Type: Global Date

Choose a set date that is the same for every Contact. When this date rolls around, emails will be sent to each Contact in your Automation Audience.

Edit Trigger: Global Date

Choose Trigger

Trigger Properties

A set date that is the same for every Contact.

Choose Date

21 ▾ July ▾ 2017 ▾

Delay

Run 0 day(s) ▾ before ▾

[Cancel](#) Save

It's a good idea to use Schedule in conjunction with a Global Date trigger if for example you want your emails to be sent during certain hours of the day, or only on specific days of the week.

[Read more about Scheduling Steps in our guide](#)

You might use a Global Date trigger for an event you want to advertise, such as the start of a sale or a seminar or conference. If so, setting a Delay in the Properties tab gives you the flexibility to send lead-up emails before the event and follow-up emails after.

Trigger Type: Individual Date

A date individual to every Contact from a date-based Custom Tag. Just like the Date of Birth Tag that forms the basis of Birthday Automations, the Individual Date Trigger relies on your Contacts each having a date in a Custom Tag of your choice.

This Trigger is good for things like membership renewals or perhaps a holiday series. You can even automate based on two Custom Tags per Contact. For example, email Contacts a message to say you hope they enjoy their holiday, and then ask them how it was when they return by using the Individual Date Trigger on two steps, with 2 different Custom Tags respectively (holiday start date and holiday end date).

Trigger Type: Date of Birth

A date individual to every Contact from the Date of Birth Tag. This Trigger is ideal for Birthday Automations and automatically repeats annually. It could be Birthday wishes, it could be Birthday offers – it's up to you.

Trigger Type: Contact Sent Previous Email

Triggered at the point the Contact is sent an email from the previous Step. In other words, unless you add a Delay and/or Scheduling, this Step will send an email **immediately** after the Contact is sent an email by the previous Step.

When used on multiple Steps with delays added, this Trigger can help you create a nicely timed series.

Trigger Type: Contact Opened Previous Email

Triggered at the point the Contact opens the email sent from the previous Step. Use a Delay and/or Scheduling with this Trigger to prevent an email being sent immediately. For example you might want to delay the follow up email from being sent out by 1 hour or 1 day.

Trigger Type: Contact Clicked Previous Email

Triggered at the point the Contact clicks a link on the email sent from the previous Step. At this point you know they've engaged with your campaign, so sending another email could be beneficial.

Don't forget Delays and Scheduling

A Trigger is what sends an email, but don't forget Triggers are governed by Delay and Schedule settings too.

Delay and Scheduling examples:

- A Step with no Delay or Schedule set will send immediately when triggered.
- A Step with a Delay of 2 days will send exactly 2 days after it was triggered.
- A Step with a Delay of 2 days and Scheduled to send on Mondays between 9:00 and 23:00 will send after 2 days, on the next Monday from 9:00 onwards, no later than 23:00.

This all happens on a per-Contact basis, so for the last example, if a Contact meets the Trigger conditions at 3pm on Saturday, they won't be sent the email for that Step until two Mondays later, because the first Monday that comes round isn't yet 2 days after 3pm on Saturday.

Read more about [Scheduling a Step in our handy guide](#)

For more information on getting the most from your NewZapp account, visit our [Knowledge Base](#) or contact us on support@newzapp.co.uk.