
tryton*marketingautomation* Documentation

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The marketing_automation module allows marketing actions to be automated. It is based on scenarios and activities that are executed on selected records.

CHAPTER 1

Scenario

A scenario provides the entry point for records into an automated marketing campaign. Each record can only enter a scenario once. A scenario is defined by:

- Name
- Model: the type of record for the scenario (by default Party and Sale)
- Domain: used to filter records
- State:
 - Draft
 - Running
 - Stopped

A cron task runs periodically to find new records to apply the scenario to.

The activities form a scenario. They define which action should be triggered and when it should happen. The activities are organized as a tree and defined by:

- Name
- Parent
- Children
- On: event from the parent that triggers the activity:
 - E-Mail Opened
 - E-Mail Not Opened
 - E-Mail Clicked
 - E-Mail Not Clicked
- Condition: that the record must match to execute the activity
- Delay: before the action is executed
- Action: list of available actions

2.1 Actions

2.1.1 Send E-Mail

The activity send an e-mail to the party defined on the record. The E-mail is composed using an HTML *Genshi* template with *record* in the evaluation context. All *<a>* elements have their *href* replaced by a shortened version used to trigger children activities. If the *href* value is *unsubscribe*, it is replaced by the URL which allows the recipient to block their record for the scenario. A empty image is automatically added at the end of the *<body>* to track when emails are opened.

CHAPTER 3

Record

It stores a reference to the records included in each scenario. If the record is blocked, no activity will be triggered for the record.

CHAPTER 4

Record Activity

It stores the state of a record for an activity of the scenario.

A cron task runs periodically to execute any waiting record activity that is due.

The marketing_automation modules uses parameters from the section:

- *[email]*:
 - *from*: The default *From* for the email.
- *[marketing]*:
 - *automation_base*: The base URL without a path for the unsubscribe URL and the empty image. The default value is created using the configuration *[web] hostname*.