



CLUB CADDIE

a *Jonas* Software Company

Email Marketing Automation Training

Advanced Automation

Email Marketing Automation Training

Courses

- 1. Advanced Automation**
2. Content Blocks + Dynamic Content
3. Edit Footers
4. Automated Messages
5. Survey Creator
6. Site Visitor Signup Box
7. Template Editor

Advanced Automation

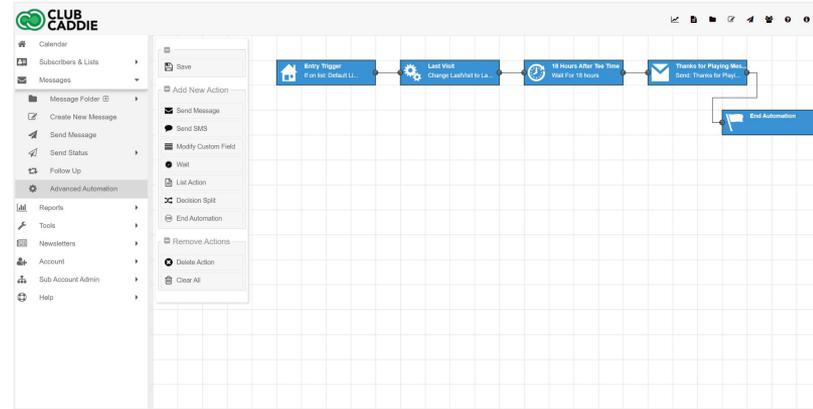


Advanced Automation

The advanced automation is a powerful tool that allows you to create email workflows to engage and nurture all of the people in your subscriber database. You can use this tool to set up workflow actions triggered by subscriber information, such as opens, clicks, custom field values, and more.

Here are some examples of ways to use the advanced automation tool:

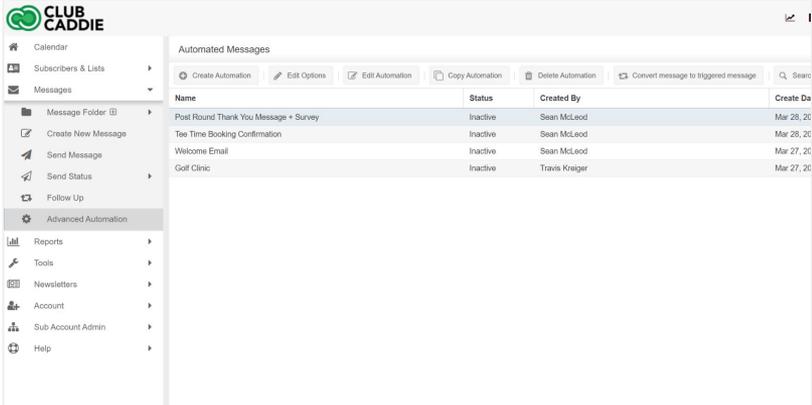
1. **Engaged Subscriber Workflow:** Send a specific message to those who opened your last message, and re-engage inactive subscribers with a series sent to those who did not open the message.
2. **Registration Workflow:** Email subscribers a series of messages until they register for an event, then move them to a different workflow.



Creating an Advanced Automation

To create an Advanced Automation:

1. Click **Messages**.
2. Click **Advanced Automation**.
3. Click **Create Automation**.
4. Enter a name for the automation and an email address that will receive any alerts regarding your automation. You can also modify any other [Automation Options](#) in this menu.
5. Click **Save**.



The screenshot shows the CLUB CADDIE interface for managing automated messages. The left sidebar contains a navigation menu with the following items: Calendar, Subscribers & Lists, Messages (selected), Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation (highlighted), Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main content area is titled 'Automated Messages' and includes a search bar and several action buttons: Create Automation, Edit Options, Edit Automation, Copy Automation, Delete Automation, and Convert message to triggered message. Below these buttons is a table with the following data:

Name	Status	Created By	Create Date
Post Round Thank You Message + Survey	Inactive	Sean McLeod	Mar 28, 20
Tee Time Booking Confirmation	Inactive	Sean McLeod	Mar 28, 20
Welcome Email	Inactive	Sean McLeod	Mar 27, 20
Golf Clinic	Inactive	Travis Kraeger	Mar 27, 20

Automation Options

You can specify different options for an automation by selecting it and clicking Edit Options.

Name

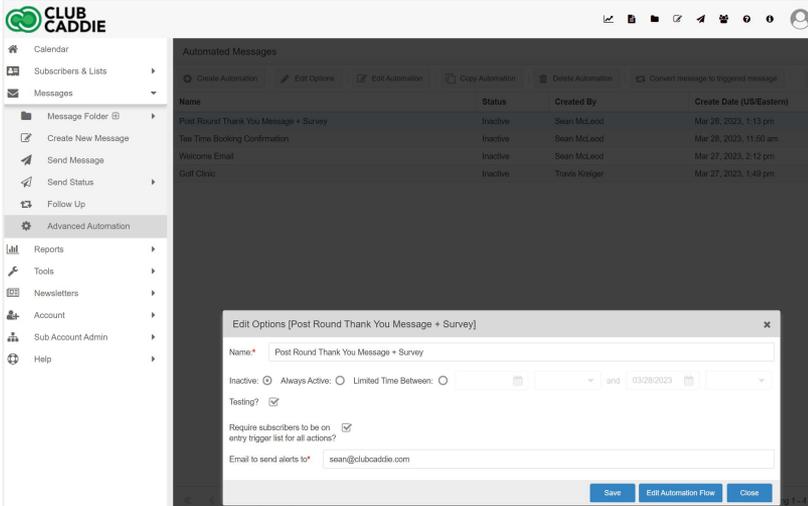
The automation name is for identifying the automation. It is used for display purposes only.

Active/Inactive

You can specify when your automation should be active. The options are inactive, always active, or active between certain dates/times.

Testing

Check the box for this option to set your automation to Testing mode. See [Testing an Advanced Automation](#) for more information.



The screenshot shows the CLUB CADDIE interface. On the left is a navigation menu with items like Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation, Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main area displays 'Automated Messages' with a table of automation entries:

Name	Status	Created By	Create Date (US-Eastern)
Post Round Thank You Message + Survey	Inactive	Sean McLeod	Mar 26, 2023, 1:13 pm
New Time Booking Confirmation	Inactive	Sean McLeod	Mar 26, 2023, 11:50 am
Welcome Email	Inactive	Sean McLeod	Mar 27, 2023, 2:12 pm
Soft Close	Inactive	Trevi Koeger	Mar 27, 2023, 1:49 pm

An 'Edit Options' dialog box is open for the 'Post Round Thank You Message + Survey' automation. It contains the following fields and options:

- Name: Post Round Thank You Message + Survey
- Inactive: Always Active: Limited Time Between: and
- Testing?:
- Require subscribers to be on entry trigger list for all actions?:
- Email to send alerts to*: sean@clubcaddie.com

Buttons at the bottom of the dialog include 'Save', 'Edit Automation Flow', and 'Close'.

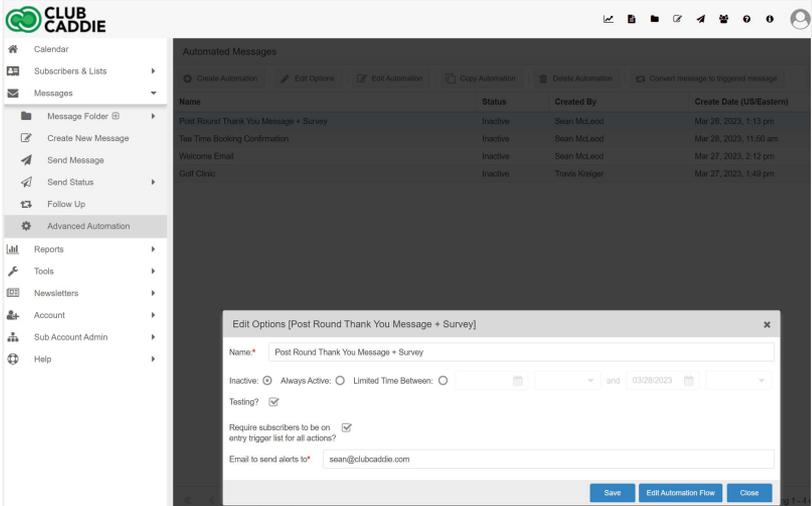
Automation Options

Require Subscribers To Be On Entry List

Check the box for this option to require subscribers to be on the entry list for actions to happen. When this option is enabled, subscribers must be on the entry list at all times for them to keep progressing through the automation. If at any time a subscriber is no longer on the entry list, no further actions will be taken on that subscriber.

Email to Alert

If for any reason we encounter an issue with your automation, this is the email that we will use to notify you.



The screenshot shows the CLUB CADDIE interface. On the left is a navigation menu with options like Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation, Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main area displays 'Automated Messages' with a table of messages and an 'Edit Options' dialog box for a specific message.

Name	Status	Created By	Create Date (US-Eastern)
Post Round Thank You Message + Survey	Inactive	Sean McLeod	Mar 26, 2023, 1:13 pm
New Time Booking Confirmation	Inactive	Sean McLeod	Mar 26, 2023, 11:50 am
Welcome Email	Inactive	Sean McLeod	Mar 27, 2023, 2:12 pm
Soft Close	Inactive	Trevi Koeger	Mar 27, 2023, 1:49 pm

The 'Edit Options' dialog box for 'Post Round Thank You Message + Survey' includes the following fields and options:

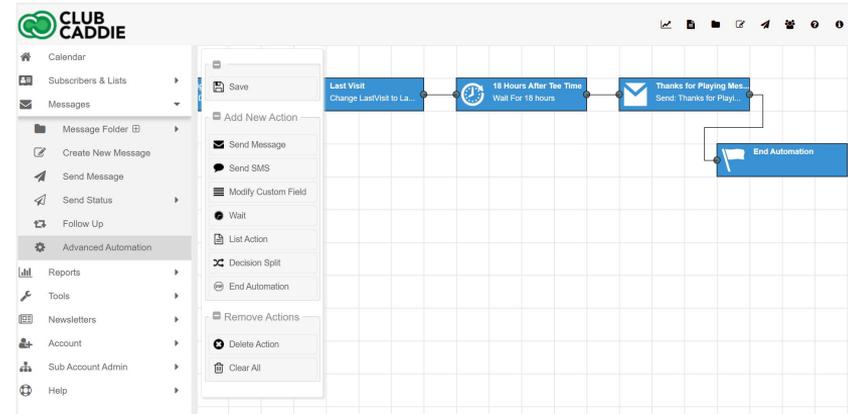
- Name: Post Round Thank You Message + Survey
- Inactive: Always Active: Limited Time Between: and
- Testing?:
- Require subscribers to be on entry trigger list for all actions?:
- Email to send alerts to*: sean@clubcaddie.com

Buttons at the bottom of the dialog: Save, Edit Automation Flow, Close.

Adding Actions

Actions are the building blocks of the advanced automation. There are different **Action Types** that you can string together to create your automation. As a subscriber is moved along your automation path, these actions will be performed on them.

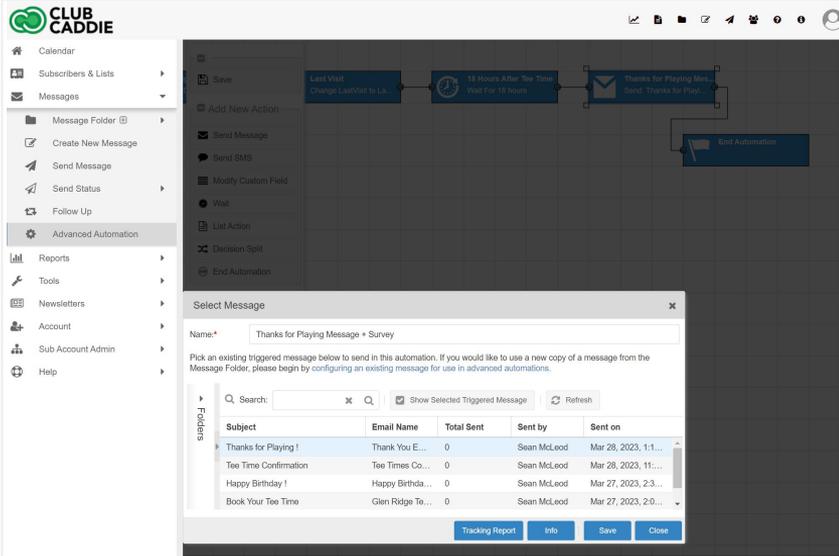
1. From the main Advanced Automation grid (Messages -> Advanced Automation), select an automation and click **Edit Automation**.
2. To add an action, select an existing action on the grid and click the button of the action type that you would like added. The new action will be added after the selected action. If an action is already linked to the selected action, the new action will be inserted between the selected action and the linked action.
3. New actions cannot be added after End Automation actions.



Editing Actions

To edit an action, double click on any one on the grid. A window will pop up that will allow you to further customize that particular action. See [Action Types](#) for action-specific instructions. The **Name** field in the action edit window will allow you to specify a name for the action. This is helpful in quickly identifying the purpose of the action in your workflow.

Most actions also have an **Info** button which allows you to see how many subscribers are currently "in" the action. This means the action has been completed for those subscribers but they have not proceeded to the next action yet.



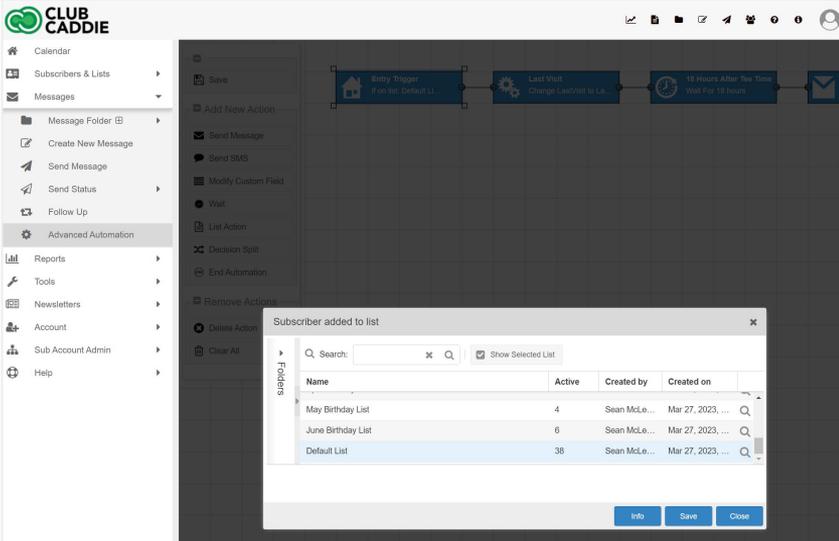
The screenshot displays the CLUB CADDIE interface. On the left is a navigation menu with options like Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation, Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main area shows an automation workflow with steps: 'Lead List Change Lead To LA', '10 Hours After New Tee Time Wait For 10 hours', and 'Thanks for Playing Message - Send Thanks for Play...'. A 'Select Message' dialog box is open, showing a search for 'Thanks for Playing Message + Survey' and a table of messages.

Subject	Email Name	Total Sent	Sent by	Sent on
Thanks for Playing!	Thank You E...	0	Sean McLeod	Mar 28, 2023, 1:1...
Tee Time Confirmation	Tee Times Co...	0	Sean McLeod	Mar 28, 2023, 11...
Happy Birthday!	Happy Birthda...	0	Sean McLeod	Mar 27, 2023, 2:3...
Book Your Tee Time	Glen Ridge Te...	0	Sean McLeod	Mar 27, 2023, 2:0...

Action Types - Entry Trigger

This is the first action in an automation. It represents the list of subscribers that will be fed into the automation. To specify which list is used by editing the action:

1. Double click the entry action.
2. Select a list from the list selector. Both Dynamic and Static lists are valid for entry triggers.
3. When you have selected a list, click **Save**.
4. The **Info** button allows you to see how many subscribers are currently "in" the entry action, meaning they have been queued up for the automation flow but have not proceeded to their first action yet.



The screenshot shows the CLUB CADDIE interface with an automation flow. The 'Entry Trigger' action is selected, and a modal window titled 'Subscriber added to list' is open. The modal displays a table of subscriber lists with the following data:

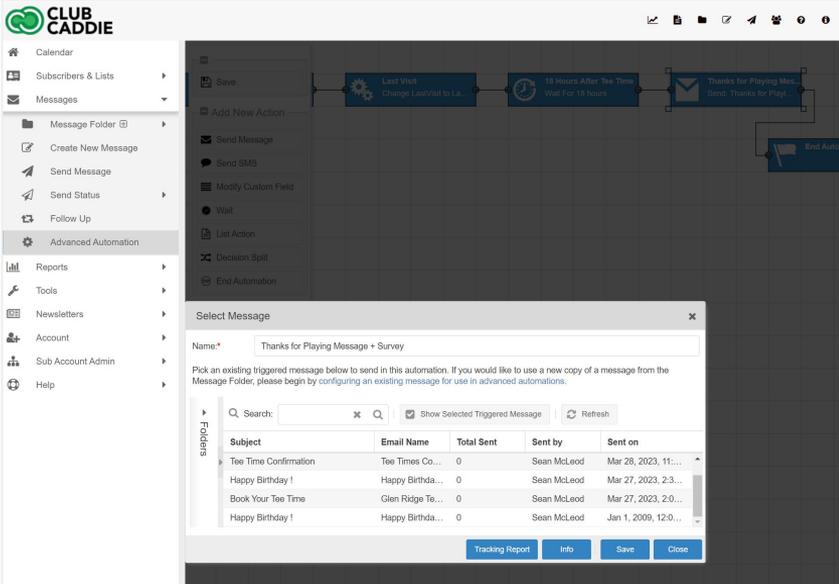
Name	Active	Created by	Created on
May Birthday List	4	Sean McLe...	Mar 27, 2023, ...
June Birthday List	6	Sean McLe...	Mar 27, 2023, ...
Default List	38	Sean McLe...	Mar 27, 2023, ...

The modal also includes a search bar, a 'Show Selected List' checkbox, and buttons for 'Info', 'Save', and 'Close'.

Action Types - Send Message

This action type will send a message to the subscriber. Send Message actions are indicated by an envelope icon. To specify which message to send:

1. Double click a message action
2. Select a message from the list.
 - a. Only triggered messages are supported for this action type.
 - b. If you need to convert a message into a triggered message, you can click the link in the section that says: "Pick an existing triggered message below to send in this automation. If you would like to use a new copy of a message from the Message Folder, please begin by configuring an existing message for use in advanced automations."
 - c. To read more on how to create a triggered message, please see [Triggered emails](#).
3. When you have selected a message, click **Save**.



The screenshot displays the CLUB CADDIE interface. On the left is a navigation menu with options like Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation, Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main area shows an automation workflow with steps: Save, Add New Action, Send Message, Send SMS, Modify Custom Field, Wait, Last Action, Decision Split, and End Automation. A 'Select Message' dialog box is open, showing a search bar and a table of messages.

Select Message Dialog:

Name: Thanks for Playing Message + Survey

Pick an existing triggered message below to send in this automation. If you would like to use a new copy of a message from the Message Folder, please begin by configuring an existing message for use in advanced automations.

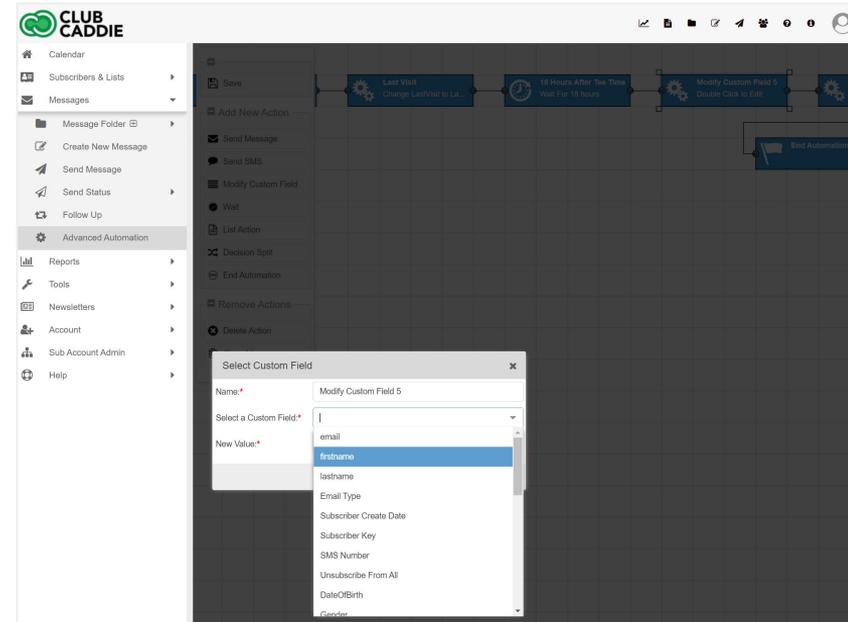
Subject	Email Name	Total Sent	Sent by	Sent on
Tee Time Confirmation	Tee Times Co...	0	Sean McLeod	Mar 28, 2023, 11:...
Happy Birthday 1	Happy Birthda...	0	Sean McLeod	Mar 27, 2023, 2:3...
Book Your Tee Time	Glen Ridge Te...	0	Sean McLeod	Mar 27, 2023, 2:0...
Happy Birthday 1	Happy Birthda...	0	Sean McLeod	Jan 1, 2009, 12:0...

Buttons: Tracking Report, Info, Save, Close

Action Types - Modify Custom Field

This action type will change a custom field from the current value to a new value you specify for all subscribers who reach this action. Actions of this type are indicated by a gear icon. To edit the options for this action:

1. Double click a custom field action.
2. Select which custom field will be changed for subscribers who reach this action from the **Select a Custom Field** drop down.
3. Enter what the new value will be in the **New Value** text box.
4. Click **Save**.



The screenshot displays the CLUB CADDIE Advanced Automation interface. On the left is a navigation menu with options like Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation, Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main workspace shows a workflow with several steps: 'Last Visit Change LastVisit to LA', '18 Hours After See Time Wait For 18 hours', 'Modify Custom Field 5 Double Click to Edit', and 'End Automation'. A 'Modify Custom Field' action is highlighted with a gear icon. A modal window titled 'Select Custom Field' is open over this action, showing the following fields:

- Name: Modify Custom Field 5
- Select a Custom Field: A dropdown menu with 'email' selected and 'firstname' highlighted.
- New Value: A text input field.

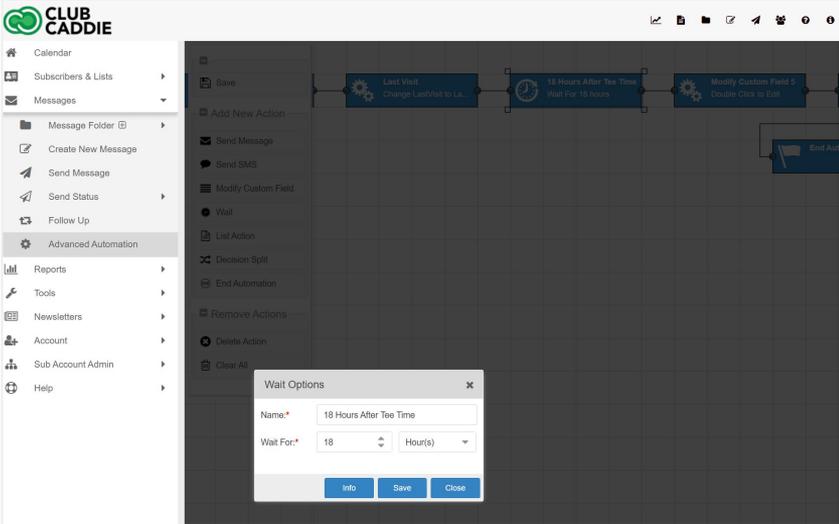
At the bottom of the modal, there is a scrollable list of available custom fields: lastname, Email Type, Subscriber Create Date, Subscriber Key, SMS Number, Unsubscribe From All, DateOfBirth, and Gender.

Action Types - Wait

Wait actions will force subscribers to wait for a certain period of time before continuing through the workflow. This type of action is indicated by a clock icon. To specify the wait number and wait unit:

1. Double click a wait action.
2. Enter the wait number/count in the number text box. Any positive integer is valid for the wait number.
3. Select a wait unit from the drop down. The available wait units are hours, days, weeks, and months.
4. Click **Save**.

For example, if you want a subscriber to wait 5 hours before they are processed again, enter 5 in the number textbox and select hour(s) from the drop down. In testing mode, if there are subscribers waiting in a wait action you can click **Info** and then click **Skip Wait** to indicate that those subscribers should be processed again without waiting any more

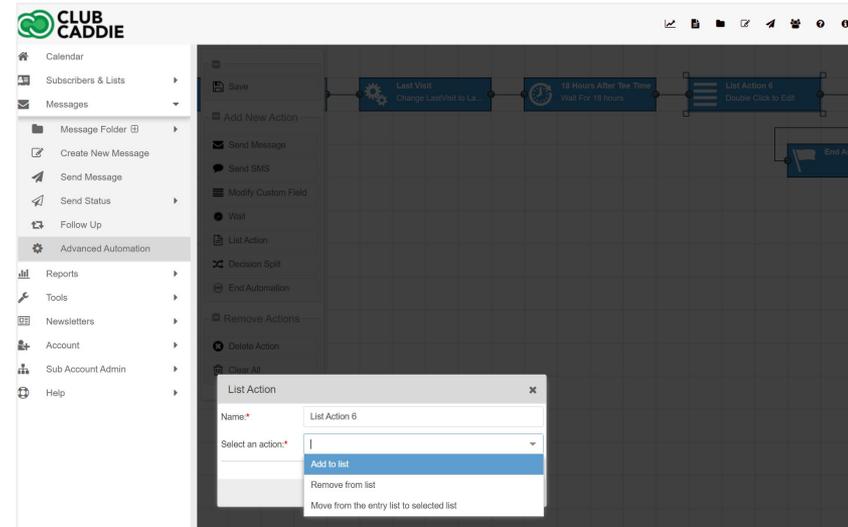


The screenshot displays the CLUB CADDIE Advanced Automation interface. On the left, a navigation menu includes options like Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation (selected), Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main workspace shows a workflow with three steps: 'Last Visit Change Location to LA', '18 Hours After Too Time Wait For 18 hours', and 'Modify Custom Field 5 Update Club to 500'. A 'Wait' action is highlighted in the left sidebar. A 'Wait Options' dialog box is open, showing 'Name' as '18 Hours After Too Time' and 'Wait For' as '18' with a dropdown menu set to 'Hour(s)'. The dialog has 'Info', 'Save', and 'Close' buttons.

Action Types - List Action

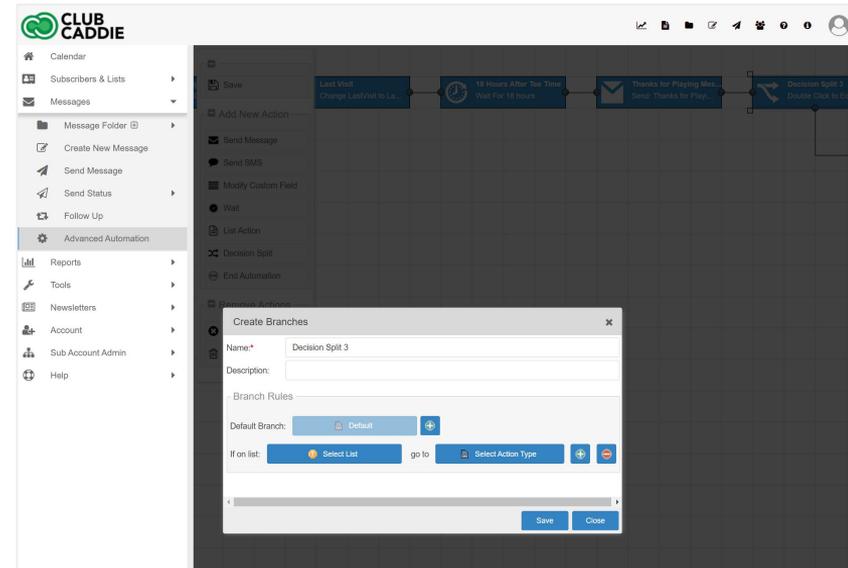
List actions allow you to either add a subscriber to a list or remove them from a list. If your entry list is static you will also be able to choose an option that will allow you to move subscribers from the entry list to another list. This type of action is indicated by an icon with 4 horizontal lines. To specify what action to take:

1. Double click a list action.
2. Select **Add to list** or **Remove from list** from the drop down. If the entry trigger list is a static list, then you will also be able to select **Move from the entry list to selected list as an option.**
3. Once you have selected between these options you will be able to select which list on which the action will be applied. You can only select static lists; dynamic lists do not support manually adding or removing subscribers.
4. Click **Save.**



Decision Split

Decision Splits allow you to add complex logic to the automation workflow. They are not so much an action as they are a fork in the road with logic designed to send subscribers down a certain branch in an automation. This type of action is indicated by a branching path icon. When you double click to edit a decision split action, you will be able to add multiple branches that subscribers can potentially take.

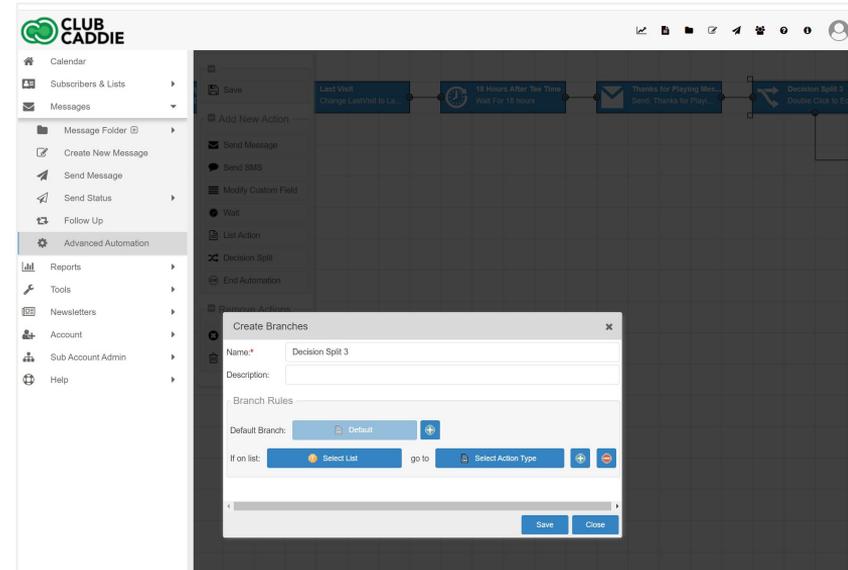


The screenshot displays the CLUB CADDIE automation editor interface. On the left is a navigation menu with categories like Calendar, Subscribers & Lists, Messages, Message Folder, Add New Action, Send Message, Send SMS, Modify Custom Field, Wait, List Action, Decision Split, End Automation, and Campaign Actions. The main workspace shows a workflow sequence: 'Last Visit Change Location to LA' (with a branching path icon), '18 Hours After You Visit For 18 Hours', 'Thanks for Playing Message Send Thanks for Play', and 'Decision Split 3' (with a branching path icon). A 'Create Branches' dialog box is open over the 'Decision Split 3' action, containing the following fields and options:

- Name*: Decision Split 3
- Description:
- Branch Rules
- Default Branch: Default
- If on list: Select List go to Select Action Type
- Buttons: Save, Close

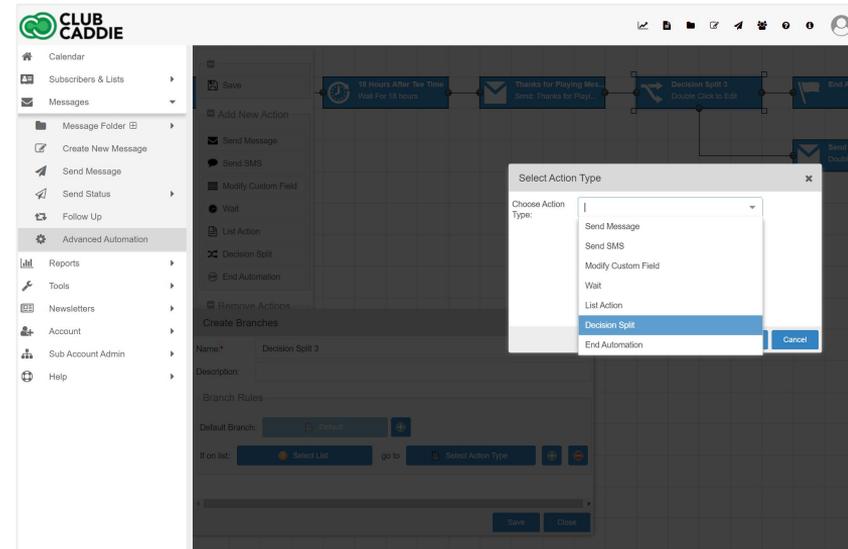
Editing a Decision Split

1. Double click a decision split action.
2. A default branch action will be created if one does not exist.
 - a. The action linked immediately to the right of a Decision Split is the default action.
 - b. If you want to manually create the default action, you can either:
 - i. Insert the new decision split action between two existing actions.
 - ii. Create a new action after the new decision split action by selecting the new decision split and clicking one of the Add New Action buttons.
 - c. The default action type for the automatically generated default action is Send Message.
3. Enter a **Name** (required) and **Description** (optional).
4. Click a green + button to add a new branch.
 - a. All branches will have their own green + button. This allows you to insert branches between existing branches.
 - b. The new branch will be inserted directly after the branch whose + button was clicked.
 - c. **IMPORTANT:** This will not be reflected on the visual grid view of the workflow.
5. For the new branch that is created, click **Select List**.
6. Choose a list that will act as the criterion for this branch.
 - a. Any subscribers on the list specified for a branch will be sent down that particular path.



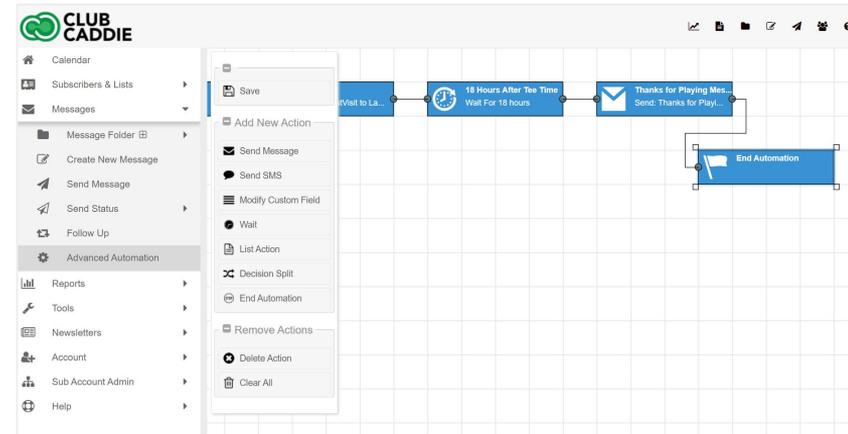
Editing a Decision Split

1. Click **Select**.
2. Optional: Click **Select Action Type** to choose which action type will be the first action in this branch. If you do not change the action type, it will default to Send Message.
3. Repeat steps 3-8 to create multiple branch criteria.
 - a. Criteria will be evaluated in the order that they appear in the edit window from top to bottom, not how they appear on the visual grid view of the automation flow.
 - b. If a subscriber is on multiple lists that have criteria for this decision split, they will go down the earliest path that applies to them.
 - c. If a subscriber does not fit any of the criteria for this decision split, they will be sent down the default path.
4. For existing branches that have already been saved, click the action button (the button after "go to") to link that branch to a different action.
 - a. If you change a branch's next action, the old action will not be deleted. This can lead to hanging actions or strings of actions that are no longer connected to the main automation flow.
 - b. Any hanging/unreachable actions must be deleted manually if you do not wish to see them anymore, or you can re-link to them with a decision split branch (see step 9 above).
5. To remove a criterion, click the red - button next to the criterion you want to remove.
6. Click **Save**.



End Automation

End Automation actions simply mark the end of an automation branch. This type of action is indicated by a flag icon. Subscribers who have reached these actions will not be processed any further. If the last action in a branch is not an End Automation action and you add more actions to that branch, any subscribers who were in the previous "last" action will continue to any newly added actions.



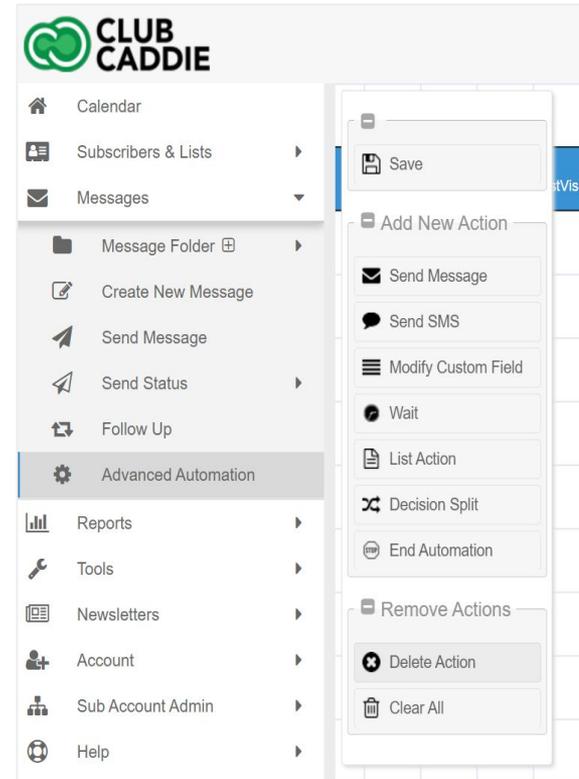
The screenshot displays the CLUB CADDIE automation builder interface. On the left is a navigation menu with categories like Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation, Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The 'Advanced Automation' section is selected. The main workspace shows a workflow on a grid. The workflow starts with a 'Visit to La...' action, followed by a '18 Hours After The Time Wait For 18 hours' action, and then a 'Thanks for Playing Mes... Send: Thanks for Playi...' action. A final 'End Automation' action, marked with a flag icon, is connected to the end of the workflow. A context menu is open over the workflow, listing actions such as Save, Add New Action, Send Message, Send SMS, Modify Custom Field, Wait, List Action, Decision Split, End Automation, Remove Actions, Delete Action, and Clear All.

Changing Action Type

To change the type of an existing action, right click the action and select the new type from the pop up menu. If you change your mind, click the red X icon to close the menu.

Deleting Actions

Select an action and click the Delete Action button. If you want to start from scratch, click the Clear All button. This will delete the entry trigger action as well, but you can recreate it by clicking any of the Add New Action buttons.



The screenshot displays the CLUB CADDIE software interface. On the left, a navigation sidebar lists various features: Calendar, Subscribers & Lists, Messages, Message Folder, Create New Message, Send Message, Send Status, Follow Up, Advanced Automation (highlighted), Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. On the right, a context menu is open over an automation action, showing options to Save, Add New Action (with sub-options: Send Message, Send SMS, Modify Custom Field, Wait, List Action, Decision Split, End Automation), Remove Actions (with sub-options: Delete Action, Clear All), and a red X icon to close the menu.