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Email Marketing Automation Training

Advanced Automation

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Courses

1. **Advanced Automation**
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Advanced Automation

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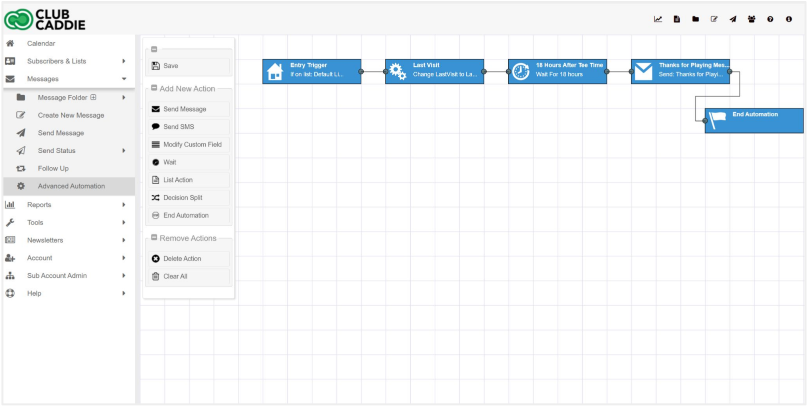
The advanced automation is a powerful tool that allows you to create email workflows to engage and nurture all of the people in your subscriber database. You can use this tool to set up workflow actions triggered by subscriber information, such as opens, clicks, custom field values, and more.



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

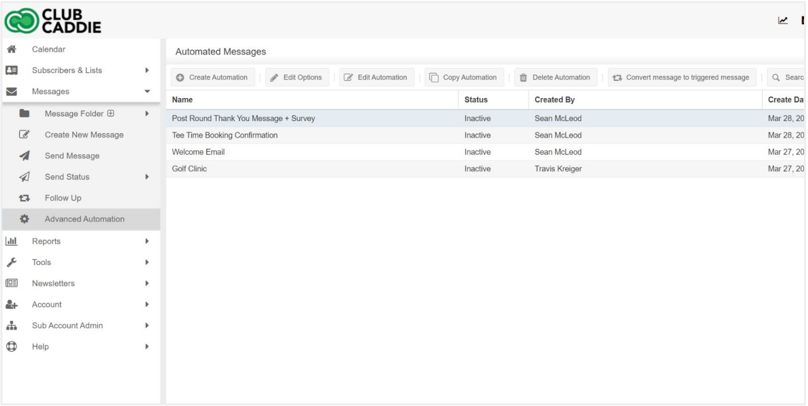
1. **Engaged Subscriber Workflow**: Send a specific message to those who opened your last message, and re-engage inactive subscribers with a series sent to those who did not open the message.

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.**



Automation Options

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

Name

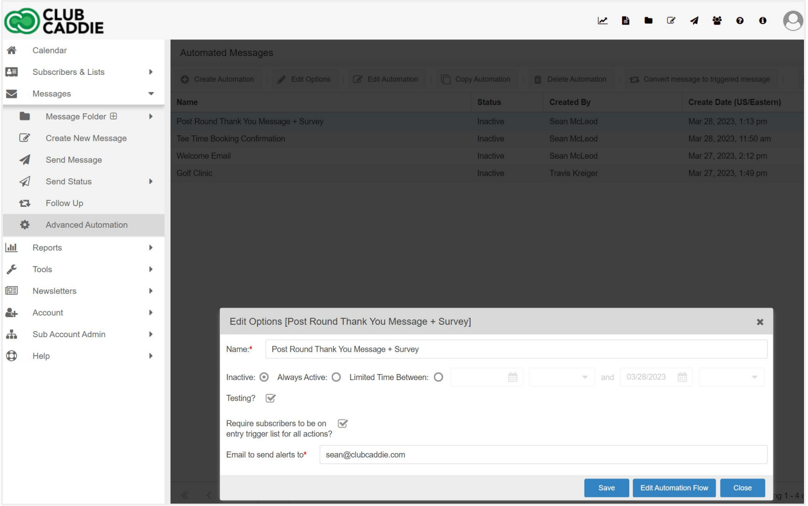
The automation name is for identifying the automation. It is used for display purposes only.

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.



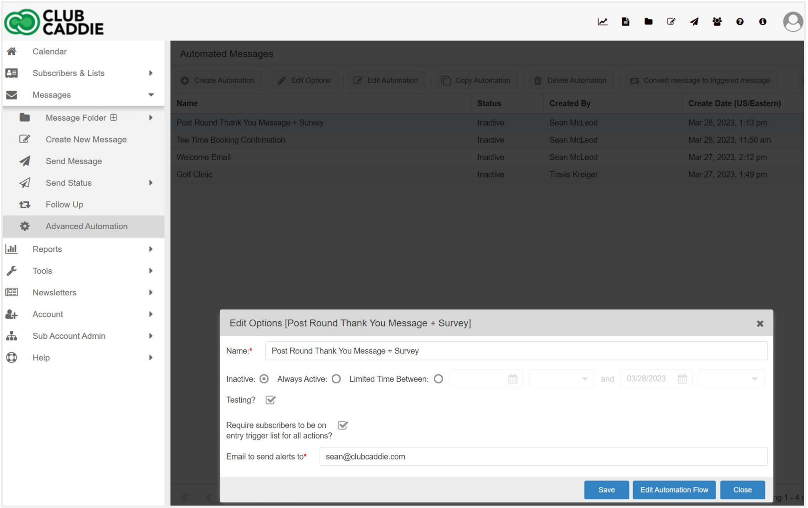
Automation Options

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.



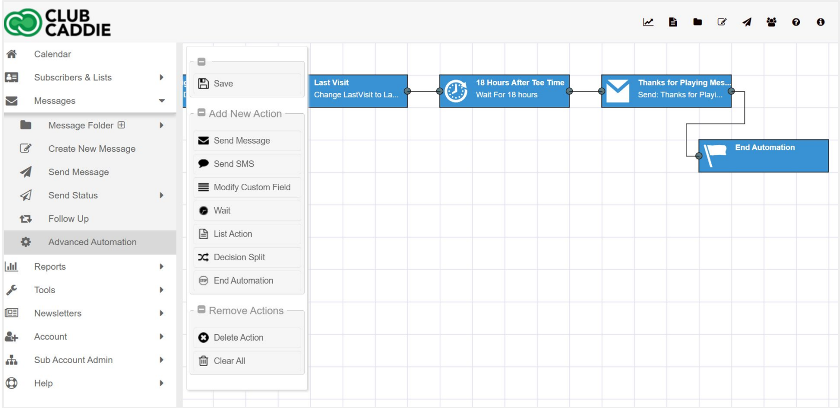
Adding Actions

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.

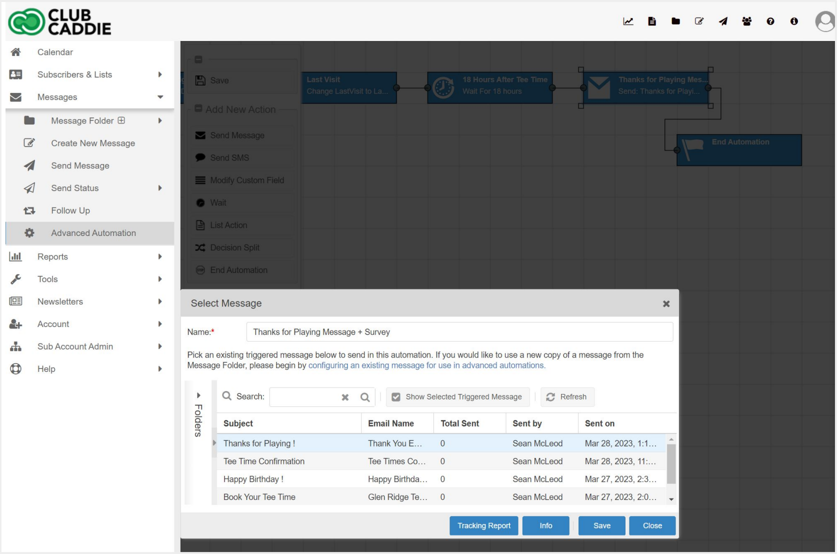
3. New actions cannot be added after End Automation actions.



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.

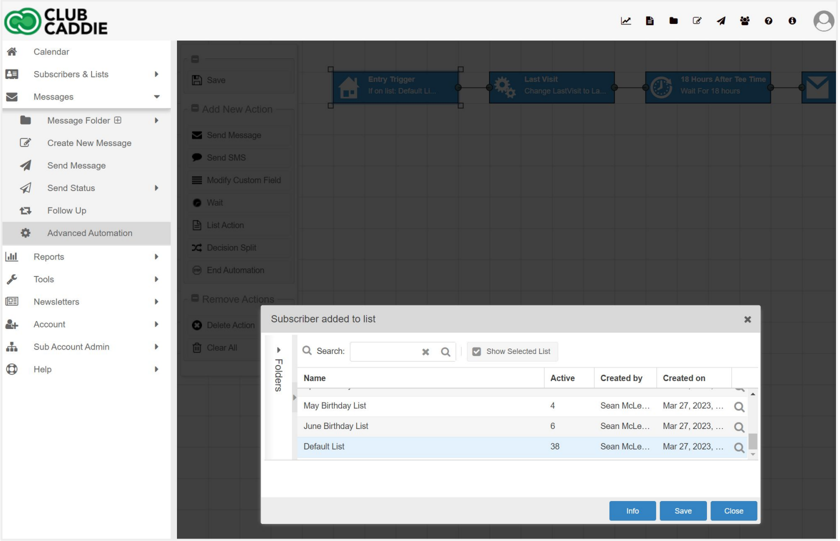
Most actions also have an **Info** button which allows you to see how many subscribers are currently "in" the action This means the action has been completed for those subscribers but they have not proceeded to the next action yet.



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:

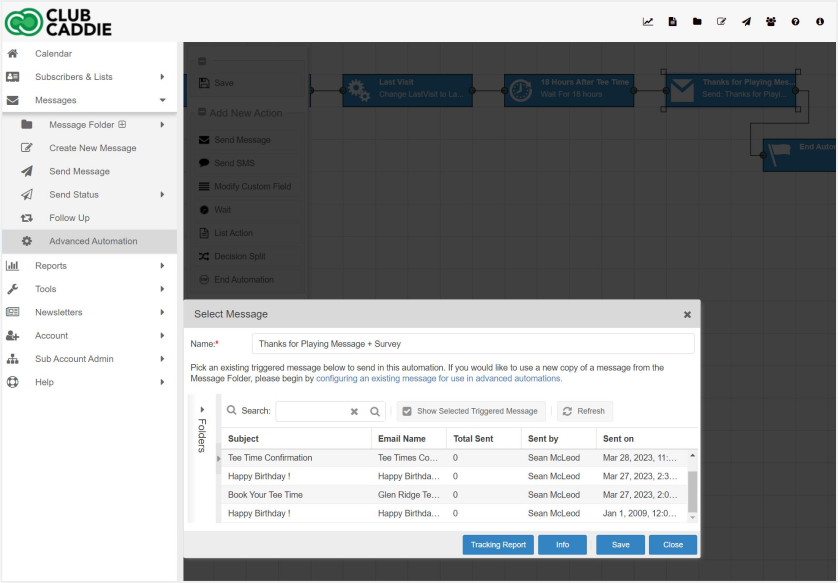
1. Double click the entry action.
2. Select a list from the list selector. Both Dynamic and Static lists are valid for entry triggers.
3. When you have selected a list, click **Save**.
4. The **Info** button allows you to see how many subscribers are currently "in" the entry action, meaning they have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



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:

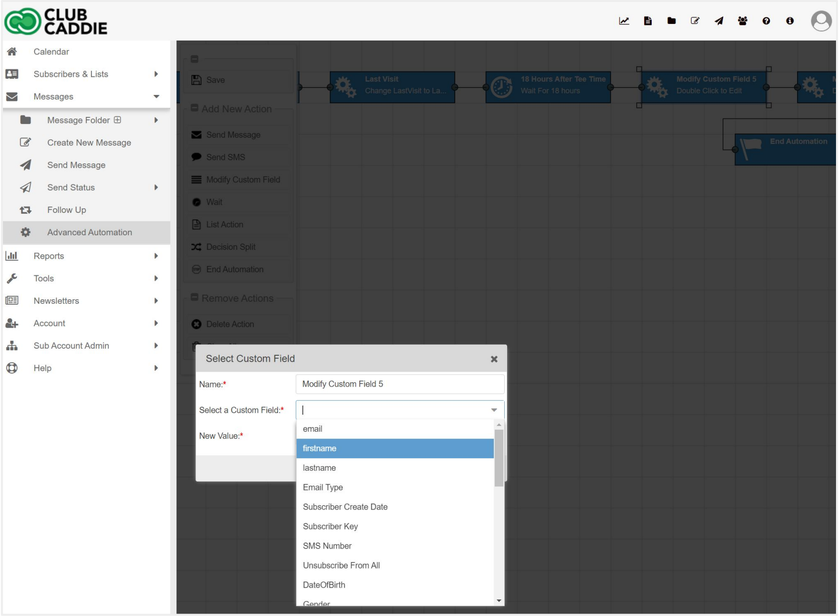
1. Double click a message action
2. Select a message from the list.
    a. Only triggered messages are supported for this action type.
    b. If you need to convert a message into a triggered message, you can click the link in the section that says: "Pick an existing triggered message below to send in 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**.



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**.

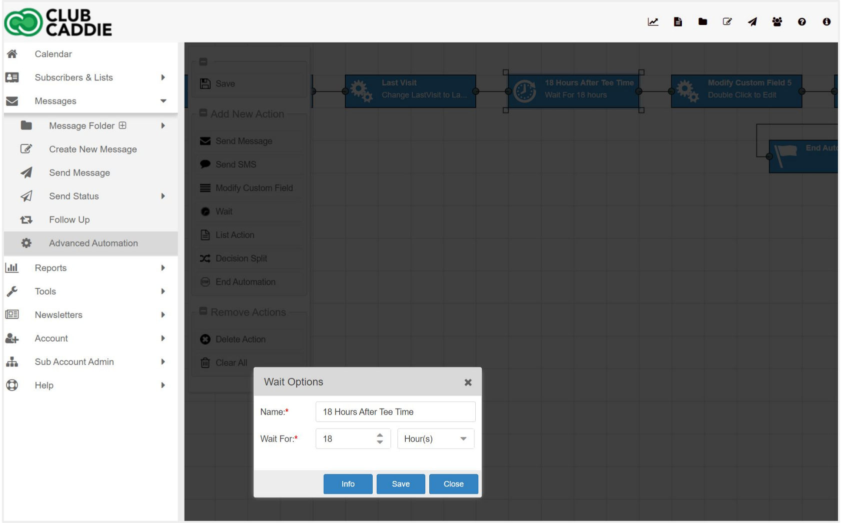


Action Types - Wait

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**.

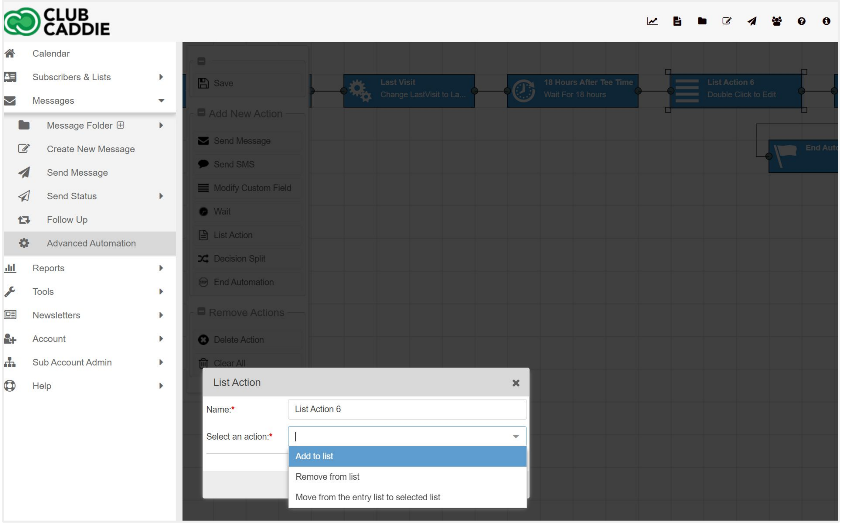
For example, if you want a subscriber to wait 5 hours before they are processed again, enter 5 in the number textbox and select hour(s) from the drop down. In testing mode, if there are subscribers waiting in a wait action you can click **Info** and then click **Skip Wait** to indicate that those subscribers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



Action Types - List Action

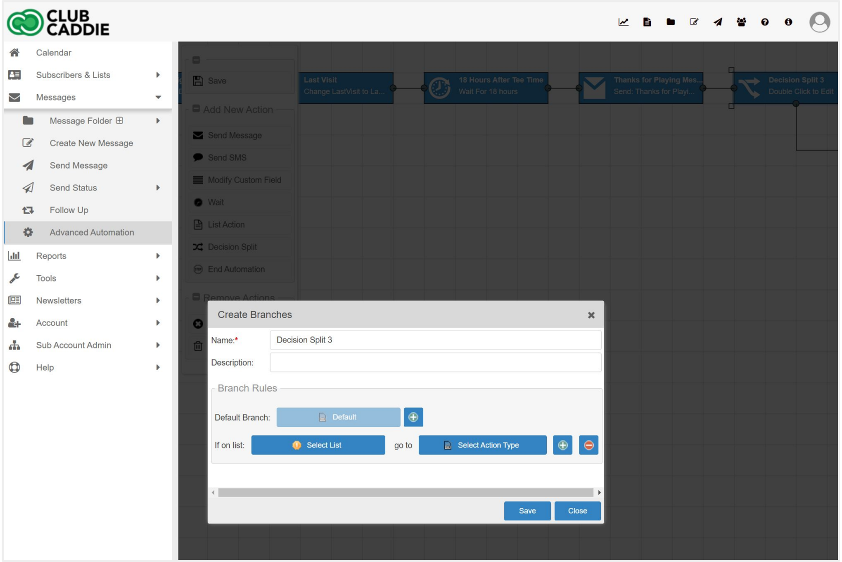
List actions allow you to either add a subscriber to a list or remove them from a list. If your entry list is static you will also be able to choose an option that will allow you to move subscribers from the entry list to another list. This type of action is indicated by an icon with 4 horizontal lines.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



Editing a Decision Split

1. Double click a decision split action.

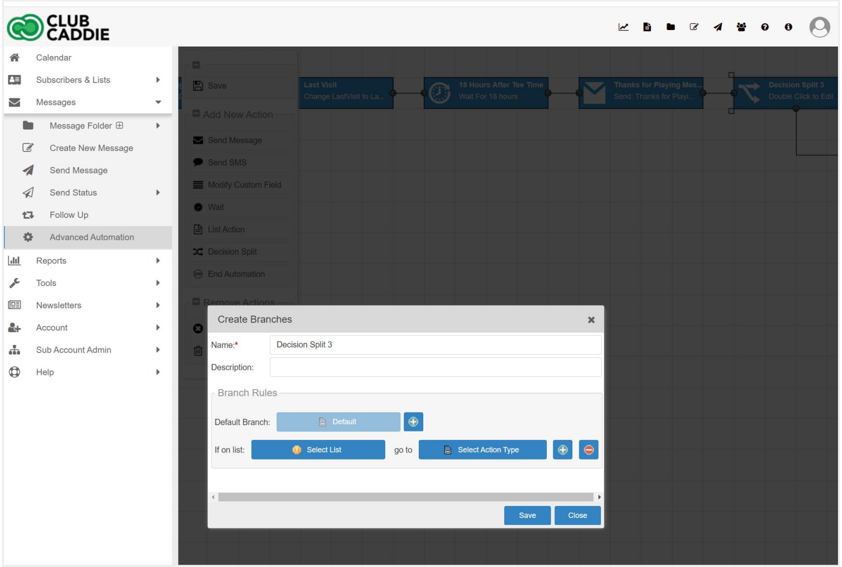
2. A default branch action will be created if one does not exist.
    a. The action linked immediately to the right of a Decision Split is the default action.
    b. If you want to manually create the default action, you can either:
        i. Insert the new decision split action between two existing 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.

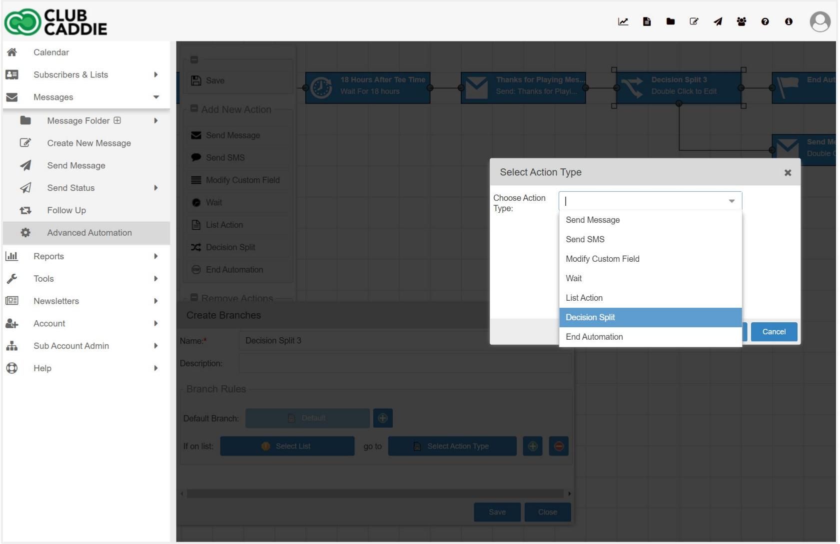
5. For the new branch that is created, click **Select List**.

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.



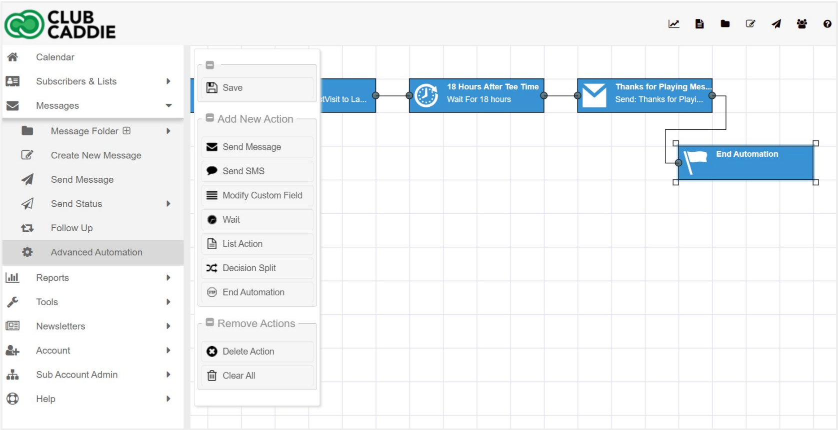
Editing a Decision Split

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.



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.