



Journey Publishing Settings

Once you finish building a journey and you are satisfied that it will work as expected, you must publish it for other users in your organization to be able to use it. When you publish, you have the option to make it either *available* or *active* for any users you provide it to.

- An *active* journey immediately begins detecting when something matches 1 of its triggers and runs on behalf of the user who has access to it.
- An *available* journey is ready to use, but it is not active. It must be made active by a user with access to it if they want it to run on their own behalf. This would only make it active for that user, not any other users with access to it.

In the journey editor, click the **Save Journey** button before proceeding. Then hover the mouse pointer over the drop-down arrow next to the Save Journey button and select the **Publish Journey** option. This opens the Publish and Access Settings slide-out panel, which has 3 primary options:

- **Do not grant access to this journey for any other users yet** – This means the journey will not be active or available for anyone in your organization. As the creator of the journey, you will still see it on your journey list page.

Note

Use this option if you want to publish the journey only for specific users and/or teams. See Team and User Settings below.

This option would also unpublish the journey from everyone in your organization if it has been published already for everyone; individually set Team Settings and User Settings would not be affected.

- **Grant access to this journey for all users, but have them activate it for themselves later** – This means the journey will be published (as available) to the account of each user in your organization. Users will see the journey on their journey list page.
- **Grant access and activate this journey for all users** – This means the journey will be published (as active) to the account of each user in your organization and will automatically start running for each user as soon as it is published to their account. Users will see the journey on their journey list page.

Save Journey ▼ Go to Classic Journey Editor

Publish and Access Settings ✕

Instructions

These settings allow you to add or remove access to everyone in your organization.

Access Settings can be overridden for individual users or teams on the journey list pages.

Do not grant access to this journey for any other users yet

Grant access to this journey for all users, but have them activate it for themselves later

Allow users to deactivate and reactivate this journey themselves

Allow users to remove individual contacts from this journey

Allow users to trigger scheduled events on this journey*

*This allows a user to manually launch future events

Grant access and activate this journey for all users

Template Settings

Make this journey available as a template to all users in the organization

Save Settings



If you select either of the latter 2 options, you can optionally select any of the following options that will apply to the journey once it is published:

- **Allow users to deactivate and reactivate this journey themselves** – This would allow a user with access to the journey to make the journey inactive if it is currently active or make it active if it is currently available or inactive.

Note

This option is mandatory when making the journey available (as shown above), otherwise a user with access will not be able to make the journey active in their account.

- **Allow users to remove individual contacts from this journey** – This would allow a user running the journey to remove a given contact from a journey prior to their reaching a designated endpoint (such as when the contact has requested not to be contacted) via the contact's details page.
- **Allow users to trigger scheduled events on this journey** – This would allow a user running the journey to manually bypass the currently pending journey step for a contact via the contact's details page.
- (under Template Settings) **Make this journey available as a template to all users in the organization** – This would allow any user in your organization with permission to create journeys to use this journey as a starting point for any similar journeys they might want to build. Once a journey based on a template has been saved, it is not affected by later changes to the template.

You can select any combination of these options.

Note

You must click the **Save Settings** button at the bottom of the panel for your selections to take effect.

Once you do so, the journey is listed on the journey list page with either the Active or Available badge (according to your selections) for every user in your organization. An active journey is live.

Team and User Settings

From the journey list page, you can modify settings for individual users or whole teams that belong to your organization. This works best if you have saved or published the journey for yourself only and you then want to add access for others.

On the journey list page, locate the journey you want to modify and select either **Actions → User Settings** or **Actions → Team Settings**.

On the User Settings or Team Settings page, select all the users or teams whose settings you want to modify for the journey you previously selected. Click the **Change Settings** button to open the slide-out panel.



Submit ✕

Note: This form overwrites the settings of the currently selected row(s) and does not reflect their current settings.

Access Settings

Add Access

Deny Access

Clear Access

Journey Settings

Available as a template.

- Journey templates can be copied by users with access to them as a starting point to build out their own journeys.
- Available on the Template Settings tab in the journey form.

Activate for all users.

- It will become active for all users in your organization who don't have the default settings overridden by user or team settings.
- It will be activated for all new users added to your organization who don't belong to a group that has the default settings overridden.

Available to activate (opt-in) and deactivate (opt-out)

- It will become visible on the Journeys page for all users in your organization who don't have the default settings overridden by user or team settings.
- It will be visible on the Journeys page for all new users added to your organization who don't belong to a group that has the default settings overridden.
- This allows a user to Deactivate a journey when it is made active for them.

Allow users to stop this journey.

- This allows a user to manually end a journey that has started on a contact.

Allow users to trigger scheduled events on this journey.

- This allows a user to manually fire events that are scheduled in the future.

Access Settings

You can assign access at the organization level (as described above) or at the team or user level. Team settings take precedence over organization settings, while user settings take precedence over both. If the journey is neither allowed nor denied to a given user, then their team settings apply. If the user's teams are also neither allowed nor denied, then the organization setting applies.

For example, if access is not given at the organization level and is denied to a user's teams, but that user is allowed access at the user level, then that user has access because the user access setting takes priority. Likewise, if either the organization or a user's teams have access, but that user is denied access, then that user will not have access.

When modifying the settings in the panel shown above, you must select either **Add Access**, **Deny Access**, or **Clear Access**.



- If you select Add Access, access will be granted to any users (or teams) you initially selected according to the Journey Settings you select below.
- If you select Deny Access, all access to the journey will be denied to any users (or teams) you initially selected.
- If you select Clear Access, any access settings (allowed or denied) that were previously defined are cleared for the users (or teams) you initially selected. For example, if you clear access at the user level, then that user's access will be determined at the team level (or, if the team setting is also cleared, the organization level).

If you select Add Access, you must also select the settings you want to grant in the Journey Settings section. If you select either Deny Access or Clear Access, the Journey Settings section is hidden.

Click the **Submit** button at the top of the panel to save your changes.

Note

The options in this panel do not reflect the previously defined settings for your selected users or teams. They are always shown as blank when you open the panel, regardless of the current values of the settings.

Journey Settings

The options available in the Journey Settings section are the similar to those in the Publish and Access Settings panel described above. Select the settings you want for the selected users or teams and click the **Submit** button.

- **Available as a template.** – Makes your journey available as a starting point for other users' journeys. Once a journey based on a template has been saved, it is not affected by later changes to the template. Users with access to a journey that is available as a template can create copies of the journey from the journey list.
- **Activate for all users.** – Makes the journey live for the selected users (or teams) immediately. A matching trigger will then start a journey automatically for any user's contact.
- **Available to activate (opt-in) and deactivate (opt-out)** – Gives any user with access to the journey the option to publish it for their own use and allows any user running the journey to remove it from the Active status at any time.
- **Allow users to stop this journey.** – Allows any user running the journey to manually remove a contact from the journey via the contact's details page.
- **Allow users to trigger scheduled events on this journey.** – Allows any user running the journey to manually bypass the currently pending journey step for a contact via their details page.

These settings are applied as soon as you click the Submit button, but only for the users or teams you selected. If you activate a journey here, it is live for any selected users or teams.