# **Journey Statuses**

## Overview

Use journey statuses to track how your contacts are moving along journey workflows. The points where statuses change in a journey do not determine how the contact proceeds along the journey; rather, the contact's progress determines what the status should be changed to at these points.

### **Create a Journey Status**

Navigate to **Journeys** and click the **Statuses** tab at the top of the page. Click the **Create Status** button in the upper-right corner. In the Campaign Status Settings box, enter a name and description for the status in the corresponding fields, then click the **Submit** button. A status name should be succinct, but descriptive enough to make the intended purpose clear. Names must be unique, but the check for this is case-sensitive. For example, you can create a status called new if one called New already exists.

## Assign a Journey Status

When building a journey, use a **Change Journey Status** action at each point of transition that a contact passes along the journey. This includes immediately after being added to the journey and immediately before being removed from the journey.

The settings for the journey include a Successful Campaign Conversion Status and a Failed Campaign Conversion Status. You can select any saved journey status in either of these fields (though you should not select the same status for both). Once the journey is published, the statuses you select here determine the Conversion Ratio and Failure Ratio. As a result, you should make sure that you only assign these statuses as the last step the contact passes through before being removed from the journey.

For example, you might assign a contact the status New as soon as they are added, then have them pass through status In Process before ending with Complete or Failed, depending on whether the contact followed the preferred path through the journey. In this case, the Successful Campaign Conversion Status should be Complete, and the Failed Campaign Conversion Status should be Failed.

# **Filter Contacts by Status**

At any time, you can generate a list of all contacts who are currently assigned a particular journey status. You can do this either from the list of statuses or by using the filters on the contact list.

#### From the Statuses Page

- 1. Navigate to **Journeys**.
- 2. Click the **Statuses** tab at the top of the page.
- 3. For the status you are interested in, click the linked number in the Lead Count column.
- 4. You are redirected to the contacts list, which is automatically filtered to show only the contacts that have the status you selected, broken into pages of 25.

#### **From the Contact List**

- 1. Navigate to Leads & Contacts → Contacts.
- 2. Click the **Filter** button in the upper-right corner of the page. A slide-out panel opens.
- 3. In the Inclusion Rules section, click the **+Add Rule** button.
- 4. In the search bar at the top of the panel, enter status. The list is filtered automatically to show relevant results.
- 5. Under the Journey heading, click the **Status** option.

< Inclusion Rules	×
status	٩
✓ Contact Information	
Account Status	
External Lead Status	
Ok to SMS Status	
Status	
∨ Journey	
Status	
✓ Mortgage Information	
Blend Application Status	
Loan Status	
∨ Recruiting	
Recruiting Status	

6. Select one or more statuses from the drop-down list. If you select more than one item, the list reflects contacts that match any of those statuses.

	< Inclusion Rules	×
	Journey: Status	
	Enter in one or many	
-	new	
	in progress	
	closed success	
	closed failure	
	removed	

7. Click the **Done** button (hidden by the list in the screenshot above) to close the panel and filter the list.

You can apply additional filters to further refine your results. For example, if you used the status In Process on more than 1 journey, you could add separate inclusion rules that search for that status and a particular journey to show only those contacts where both criteria apply. If you apply more than 1 inclusion rule, the list reflects only those contacts that match all rules.