



Using Journey Occurrence Limits

What They Do

Occurrence limits make it possible for you to prevent a journey from causing unnecessary repetition for a contact. Depending on its use or its type, a component can be restricted to occurring a specified number of times per contact, per loan, or per product. (See Defaults below for allowed limits on each component type.)

Example

You could limit an Email Link Clicked trigger to occur only once for any contact, so a contact would not be contacted twice about clicking the same link twice.

You could limit a Loan Created trigger to occur only once per loan, so a single contact would not receive the same communication twice for the same loan, but *would* get the communication again if they opened a second loan.

You can easily change which option is limited and see the limit stated clearly before saving the settings for the component—so you can be confident that the component is limited as you intended. By using the per loan limit type on a trigger, you can be sure that a contact will be added to a loan-specific journey for each loan without manual intervention.

How To Set Limits

When building a journey:

1. Place a component on the canvas.
2. Hover the mouse pointer over the component and click the **Edit** button. The Event Settings slide-out panel opens.
3. In the Occurrence Limit section, note that the component already has a limit set by default, which is expressed as a sentence in plain English (see Defaults below). To change the default limit:
 - a. Click **Edit**. The section changes to show the editing options.
 - b. If the component allows it, you can choose **Contact**, **Loan**, or **Product** in the Limit By field.
 - c. Enter a new value in the **Occurrence Limit** field.

Note

This is an occurrence limit, not a recurrence limit. A value of 1 here means that the component will fire once for a given contact, loan, or product, but not a second time.

Occurrence Limit

Limit By: *
Contact

Occurrence Limit (max 9999)
1

Done

- d. Click the **Done** button. The tile changes back to express your setup as a sentence.
4. Adjust any other settings for the component as desired.
 5. Click the **Save Event Settings** button at the bottom of the settings panel.



Defaults

Each component has a limit applied by default when it is added to a journey. You can always set the value of the limit in the range 1–9,999. Components that limit per loan or per product by default can be changed to limit per contact. Those that limit per contact by default cannot be changed.

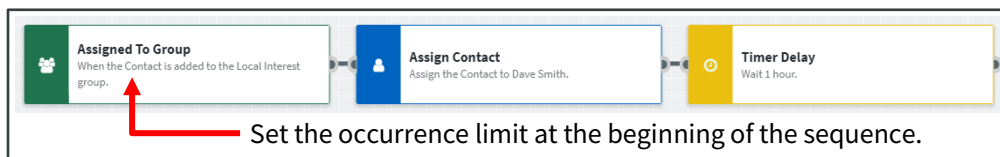


Component Type	Default Occurrence Limit		Available Limit Types
	Value	Type	
Loan-related triggers	once	per loan	Contact, Loan
Product-related triggers	once	per product	Contact, Product
Other triggers	once	per contact	Contact
All other components	9,999 times	per contact	Contact, Loan*, Product**

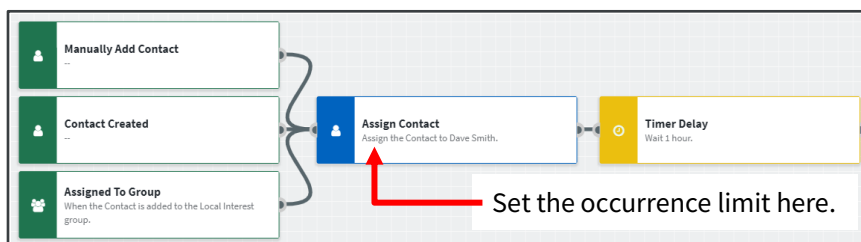
* Only components downstream of a loan-related trigger can be changed to limit per loan.
 ** Only components downstream of a product-related trigger can be changed to limit per product.

Best Practices

In a sequence of components, you only need to assign an occurrence limit value to one component, ideally as early in the sequence as possible. A limit enforced at an early step acts as a bottleneck, preventing the journey from continuing, so there is no need to limit later steps. Defining a limit on more components requires more work at initial setup and again should you need to modify the journey later. This is why triggers default to occur once, while other component types default to the maximum value.



It may make sense to define the limit slightly later than the first component in a sequence. This would typically be the case if there are multiple triggers that feed into the same sequence. In this case, do not limit the triggers; rather, define the limit on the first component in the sequence that the triggers have in common (and increase the limit on the triggers to an appropriately large value).



In the event that you need to further restrict progress along a journey after passing the initial limited step, ensure that any later limit is of the same type as the first. For example, limiting a sequence first per loan and later per contact will not work because the journey will reference the loan ID—not a contact ID—when determining how to process later components.