



Journey Manual

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Introduction

Journeys allow you to create workflows that automatically detect specified triggers and guide applicable contacts, products, or loans through logical paths of automated steps. The purpose is to automate the steps you already use to interact with your contacts. In this sense, they are similar to other campaigns that you may have used in Total Expert or traditional drip email campaigns; however journeys can do much more than send emails at specified intervals. In addition, a journey can send a text message, modify a contact's group assignments, share or assign a contact, assign a task related to the contact, and more. In addition, you can set up these actions to run under closely specified conditions, so you know you are only communicating with appropriate people at appropriate times.

These workflows allow you to have Total Expert manage the next steps necessary when a change occurs. This is especially useful when a change would be easy to miss (as when a shared contact record is modified by another user) or when many changes might occur in a short time (as with capturing leads at an open house).

Note

If a feature described in this document is not available for you, it may be because your user role does not have the corresponding permission assigned. Check with your system administrator if you think you should have access to a feature.

Definitions

A *journey* is an entire set of automated steps and settings arranged into a workflow. When a contact, product, or loan record experiences a change that matches a trigger in a journey, the affected contact is automatically added to the journey and begins to progress through the steps. Different contacts can be at different points on the same journey at the same time.

The *components* in a journey are the individual steps. These include *triggers*, *actions*, *conditions*, and *events*.

- A *trigger* is the first component in any journey workflow. Whenever the system detects that the change specified in the trigger parameters has occurred for a contact, product, or loan, the affected contact is automatically added to the journey. Triggers can be configured to detect either something happening anywhere in the Total Expert system (such as the creation of a new contact) or something happening elsewhere in the same journey (such as a change in the journey status) to trigger a secondary workflow.
 - An *inline condition* is part of the definition of a trigger and prevents unintended contacts from being added to a journey or secondary workflow.
- An *action* is a step performed by the system, such as sending an email.
- A *condition* tells the system to check whether or not a specified parameter matches a specified value or range. The workflow splits at a condition, and the contact is routed along the appropriate path, depending on the result of the comparison.
- An *event* is a temporary pause in a workflow that specifies when to move on to the next step. If there is no event between two steps, the second step will be executed immediately when the first step is completed.

When you *publish* a journey, different things may happen, depending on the options you select.



- You can make the journey *active*, meaning that it will immediately begin detecting when something matches 1 of its triggers and run. You can make the journey active for just yourself or include other members of your organization.
 - These are labeled Active on the journey list page.
- You can make the journey *available*, meaning that it is ready to use, but it is not active. You can make the journey available for just yourself or include other members of your organization. This is normally used when sharing a journey with other users who need to specify some parameters before making it active for their own use or who might decide not to use it at all.
 - These are labeled Available on the journey list page.
- You can save a journey without making it active or available.
 - These are labeled Draft on the journey list page.
- You can make the journey a *template*, meaning that you or other users in your organization can use it as a starting point to build from when creating new journey.
 - These are listed on the journey list page along with other journeys and may have either the Available or Active label, but they can be copied to create new journeys. Journeys created by other users cannot be copied unless they are designated as templates.
 - Legacy users can also find templates in the Templates tab in the classic journey editor.
 - Changes made to the journey that is the source of a template do *not* cascade into any journeys that were previously built from an earlier version of the template.
- A journey that has been shared with multiple users could have different labels in each user's account.

When you *unpublish* a journey, you remove it from the active state. It is then deactivated, but not deleted. You cannot unpublish a journey in the available state. Once it is unpublished, you can modify and re-publish it or simply leave it out of use.

- These are labeled Inactive on the journey list page.

The *journey editor* is the part of the Total Expert user interface where you create journeys. Specifically, this includes adding and removing components and connections, customizing settings, and publishing saved drafts. The header bar includes the name of the journey and action buttons to save and publish the journey.

- The *canvas* is the part of the journey editor where you place components and form connections between them.

A *journey status* is a text label that can be used to track a given contact as they step through the workflow. You might specify that the status should change at several milestones throughout the course of a single journey.

Navigating the Journey Editor

The journey editor is where you can create a new journey or return to work on a saved one. When you first open the journey editor, you will see a tabbed panel on the left side (with the first tab selected) and the canvas on the right.

The tabs in the left panel are:

- Events – This tab contains the list of components that you can include in a journey. The specific components available to you in the list depend on your permissions in the system (see Journey Components (Triggers, Actions, Conditions, and Events) below).



- **Settings** – This tab allows you to define a name, a description, and conversion metrics for the journey you are currently working on (see Customizing Journey Settings below).
- **Reports** – This tab is only shown if the journey is active or available for the current user. Here, you can create basic reports that show how many contacts have passed through specified components (see Journey Reports below).

The selected tab's icon is highlighted in blue. Click the icon of the current tab to collapse the panel. This provides additional space on your screen in the canvas. With the panel collapsed, click any tab to expand the panel again.

The canvas is blank when beginning a new journey. This is where you will add components (from the Events tab) and form connections between them. When you return to a saved journey, the saved components and connections are shown. You can zoom in and out in the canvas by rolling the scroll wheel on your mouse.

Overview of the Creation Process

The general process for creating a journey is as follows:

1. Set up the new journey, including its workflow components and connections on the canvas. Define settings as appropriate.
2. Save the workflow as a draft. If you make further changes or additions to the draft, make sure to save again.
3. Publish the workflow. The journey is made active or available, and possibly also a template (depending on your selections). An active journey will immediately begin detecting its trigger conditions.

Set Up

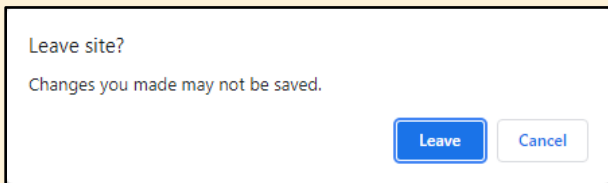
Navigate to the journey list page and click the **Create Journey** button. After you define a name (and optionally a description), the editor is shown. The first tab in the left panel (Events) is selected by default. This is where you will find all the triggers, actions, conditions, and events that are available to you. Most of the components in this list are controlled by permissions. For these, the component only appears in the list if you have permission to work with the related feature elsewhere in Total Expert. For example, loan-related components are only available if you have permission to view the loans list. The necessary permission to view a component (if any) is listed as part of its component description in the *Journey Component List*.

Save Draft

Saving a journey allows you to return to work on it again later without committing it to a published state. This is especially useful in the event that you do not finish setting up the full intended logic of the journey in one session or want to have another user review the logic and settings prior to committing it for use.

Note

If you navigate away from the journey editor without saving, you are warned that if you continue, any work since the last time you saved will be lost. Click the **Leave** button if you do want to leave the journey editor without saving; otherwise click the **Cancel** button to return to the editor so you can save before leaving.



Publish

Once a journey is published to an active state, the logic will begin working right away. When anything that matches a trigger specified in the journey occurs, the affected contact is added to the journey, and the remaining steps will execute.

You can also publish to an available state, which would normally be used to allow users with access to decide whether they will make the journey active in their account.

Journey List Page

All journey-related actions begin on the journey list page, which you can see by selecting **Journeys** in the navigation menu.

There are 2 tabs at the top of this page: Journeys and Statuses. The Journeys tab is selected by default. This tab contains a list of all the journeys you have access to (which includes those you created and those you have been granted access to). See Statuses Tab below for information on the Statuses tab.

Above the list of journeys is an indicator that reads **# of # Journeys**. This shows the number of journeys listed on the current page and the total number of journeys you have access to. If more than 25 journeys are listed, the list is broken into multiple pages; scroll to the bottom of the page and use the pagination controls to see the remaining journeys grouped into pages of 25. You can sort and filter the list using the controls in the upper-right corner of the page. The indicator updates to reflect the result of any filters applied. See Sorting and Filtering the Journey List below for more details.

To create a new journey:

1. Select **Journeys** in the navigation menu.
2. Click the **Create Journey** button in the upper-right corner of the page.
3. In the Create Journey box:
 - a. Enter a suitable name in the **Name** field. The name should be brief, but descriptive. Use organizational best practices where applicable.
 - b. Enter a description of the new journey in the **Description** field. This information is shown on the tile below the name in the journey list for any user with access to the journey.
 - c. Click the **Save** button.

The new journey is created and you are brought to the blank journey editor to begin setting it up.

Note

After a journey has been created, you can modify the name and description of a journey in the Settings tab of the journey editor.



Journey Tiles

Each journey is listed in a tile that includes information related to the journey.

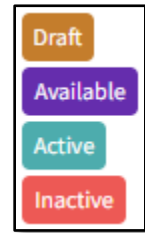
Title and Description

These are shown exactly as configured in the journey settings. The title is limited to 100 characters, and the description is limited to 500 characters. If anything longer was entered, the text is truncated to those limits.

You can click the title to open the journey editor with that journey loaded. If you are the owner of the journey, you can edit any part of it. Other users are only able to view the setup of components and settings and create reports.

Labels

Each journey has 1 of the following labels next to its title:



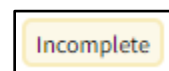
- **Draft** – Not published for any user, including yourself
 - Once published, a journey cannot return to this label.
- **Available** – Published, but not yet running in your account
 - It remains inactive for your user until you decide to make it active for yourself, even if another user decides to publish the same journey for their own use.
 - Once activated, a journey cannot return to this label.
- **Active** – Published, and currently running in your account
 - Active journeys can be deactivated by users with permission to do so.
- **Inactive** – Was once active, but has been made inactive in your account
 - No contacts can be added to the journey and any contacts already in progress are halted.
 - Inactive journeys can be reactivated by users with permission to do so.
 - If you do not make any changes before republishing, any contacts who were on the journey when it was unpublished will restart at the point where they left off. If you make changes to the journey, any contacts who were at points corresponding to your changes will still be listed as being on the journey, but they will not be able to move forward. These will be “stuck” in the journey until they are manually removed.

Note

A journey owned by another user cannot appear in your list with the Draft label. You cannot see other users’ draft journeys, and they cannot see yours. The other labels can be applied to journeys owned by you or by another user.

A journey that has been shared with multiple users might have different labels applied in various users’ accounts. For example, if a journey is published to the entire organization as *available*, everyone would see it with the Available label at first. However, when users begin activating the journey for themselves, those users would see the Active label instead (while users who took no action still see the Available label).

In addition, a journey that has been saved but has any components with incomplete setup (gray borders) will display the **Incomplete** label in addition to the primary label.



Summary Information

This information is displayed at the bottom of the tile.



- **Owner** – The name of the user who created the journey. The owner retains full editing capability.
- **Created** – The date and time when the journey was first saved. This is only shown for journeys with the Draft label.
- **Activated** – The date and time when the journey was made active in your account. If it has been toggled off and back on again, the most recent activation time is given.
- **Deactivated** – The date and time when the journey was made inactive in your account. If it has been toggled off, on, and back off again, the most recent deactivation time is given.
- **Last Updated** – The date and time when the journey was most recently saved.

Actions

These options are available at the right end of the tile.

- If you are the owner of the journey, an Actions button appears with various options in a drop-down menu.
 - The following 3 options are always available. If the Incomplete label is applied, these are the only options.
 - **Edit** – Select this option to open the journey editor. As the owner, you have full editing privileges over any part of the journey (this opens the same page as clicking the journey name).

Warning

Use caution when editing an active journey to avoid disrupting any contacts who are already on the journey.

- **Copy Journey** – Select this option to create a new journey that has the same components and settings as the selected journey. Access settings are not copied; the new journey is a draft available only to you.
- **Delete Journey** – Select this option to permanently remove the journey from your list and the list of any other users with access. Once deleted, it cannot be recovered and any reporting information is lost.
- If the Incomplete label does not apply and the journey is labeled either Draft, Available, Active, or Inactive, then the following options are added:
 - **User Settings** – Select this option to modify access to the journey on a user-by-user basis.
 - **Team Settings** – Select this option to modify access to the journey on a per-team basis.
 - **Activate For Myself** (for journeys with the Inactive label) – Select this option to make the journey active (in your own account only). Once active, this option is replaced by Deactivate For Myself. This option does not affect whether the journey is active in any other user's account.
 - **Deactivate For Myself** (for journeys with the Active label) – Select this option to make the journey inactive (in your own account only). Once inactive, this option is replaced by Activate For Myself. This option does not affect whether the journey is inactive in any other user's account.
- If another user created the journey and granted you access, 1 of the following will appear instead of the Actions button:
 - If the journey is labeled Available or Inactive, an **Activate** button. This makes the journey active in your account (see note below).



- If the journey is labeled Active, a **Deactivate** button. This makes the journey inactive in your account (see note below).

Note

Regardless of which label applies, you might see a message instead of a button. This applies when the owner granted access without allowing users to deactivate and reactivate the journey. In this case, you have no options available. You can still click the name to view the journey setup.

This Journey is required. Please contact your administrator with questions.

Journey Stats

In the lower-right corner of a journey's tile, click the **Journey Stats >** button to open a slide-out panel with the following information:

- In the top banner:
 - The name of the journey (limited to the first 100 characters)
 - Created date
 - Updated date
 - The user who created the journey
 - (if applicable) Published date
- Contacts – The number of your contacts currently on the journey (not including contacts of other users running the same journey).
- Conversions – The number of contacts that have been on the journey whose last status assignment was the Successful Campaign Conversion Status.
- Failures – The number of contacts that have been on the journey whose last status assignment was the Failed Conversion Status.
- Conversion Ratio – This is computed as the number of Conversions divided by the total number of contacts that have begun the journey (not including any that have been manually removed).
- Failure Ratio – This is computed as the number of Failures divided by the total number of contacts that have begun the journey (not including any that have been manually removed).

Note

See Goal Settings below for information on setting the Successful Campaign Conversion Status and Failed Conversion Status.

Sorting and Filtering the Journey List

On the journey list page, you can use the following methods to locate the journey you are looking for:

- Enter text in the **Search** box in the upper-right corner of the page to filter the list by name. (This field does not search any other criteria, such as description.)
- Using the first 2 drop-down lists below the Search box, filter the list by either (or both) of the journey's:
 - owner
 - label

**Tip**

The count of journeys in the upper-left corner of the page updates to reflect the results of filtering the list.

- Using the last drop-down list below the Search box, sort the list by 1 of the following criteria. There are options for both ascending and descending order for each.
 - name
 - date of creation
 - date of most recent update

Tip

You can restore the full list in default order by selecting **Journeys** in the navigation menu or by refreshing the page.

Statuses Tab

Journey statuses are used to keep track of a contact's progress through a journey. You can use the Change Journey Status action to set a new status for a contact as they pass an important milestone in the journey. A given contact may pass through any number of statuses over the course of a journey, but can only have one status at a time.

Note

Journey statuses should not be confused with the labels described above, which refer to the publishing status of the journey itself.

You can view a list of existing journey statuses by clicking the **Statuses** tab at the top of the journey list page. On this page, you can search the names of the listed statuses by entering text in the Search box in the upper-right corner of the page. You can also sort the contents of any column by clicking the column header (click it again to sort in the other direction). The sorted column has a blue arrow in the header indicating which direction the column is sorted.

Columns:

- **Name** – The name of the journey status.
- **Lead Count** – The number of contacts that are currently categorized by this journey status in some journey. When a contact completes a journey, they remain categorized in the same journey status they had when they were removed from the journey. You can click this number to see a list of the contacts with this status.
- **Created At** – The date and time when the journey status was created.
- **Updated At** – The date and time when the journey status was last saved. (If this is blank, it has not been updated since it was created.)

Creating a New Status

To create a new status:

1. Select **Journeys** in the navigation menu.
2. Click the **Statuses** tab at the top of the page. The list of available statuses is shown.
3. Click the **Create Status** button in the upper-right corner of the page.
4. In the Campaign Status Settings box:



- a. Enter a name for the status in the **Name** field. This will appear anywhere the status is referred to. Select a brief but meaning ful name to make it easy to locate in the list when configuring a journey.
- b. (optional) Enter a description of the status in the **Description** field.
- c. (optional) Check the **Make available to organization.** option if you want to allow other users in your organization to use the same status. Leave it unchecked if you want to reserve it for your own use.
- d. Click the **Submit** button.

The new status is added to the list.

Editing an Existing Status

To edit an existing status:

1. Select **Journeys** in the navigation menu.
2. Click the **Statuses** tab at the top of the page. The list of available statuses is shown.
3. Locate the status you want to modify and select **Actions → Edit**.
4. In the Campaign Status Settings box, you can update the name and description and toggle the availability option, just as you would when creating a new status.
5. Click the **Submit** button.

The list is updated with the modified status, including information in the Updated At column.

Deleting an Existing Status

To edit an existing status:

1. Select **Journeys** in the navigation menu.
2. Click the **Statuses** tab at the top of the page. The list of available statuses is shown.
3. Locate the status you want to delete and select **Actions → Delete**.
4. Click the **Yes** button in the confirmation box.

The list is updated with the selected status removed.

Note

Once a status is deleted, it cannot be recovered. Any contact with this status who is currently on a journey is not removed from the journey, but they no longer have a journey status assigned (until the next time their status is updated in the journey). This may affect conversion data and filtering by status.

Journey Components (Triggers, Actions, Conditions, and Events)

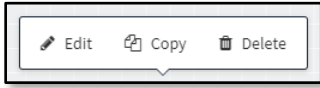
When creating a new journey or editing a previously saved draft, there are several triggers, actions, conditions, and events that you can add to the logic. The specific components available depend on the permissions assigned to your user's role.

Each individual component listed in the panel on the left has a (?) icon at the right side of the panel. Hover over this icon to see a short description for each one. (The icons on the left side are illustrative only.)



To add a component to the journey's logic, drag it from the list onto the canvas. This does not remove the component from the list; that is, you can add more than 1 component of the same type to a journey. Once a component is on the canvas, you can move it to a new location at any time by clicking and dragging it.

After you add any component to the canvas, hover the mouse pointer over it to see 3 options appear above the component.



From left to right, they are:

1. Edit

- If the component has not had the required configuration fields filled out, the box's left section and border are shaded gray.
 - You can save a journey with incomplete components, but you cannot publish it in this state.
 - When the required fields have been filled, the box's left section and border are updated to the "natural" color for the component.
 - If there are no required fields for the component (for example, the Remove From Journey action), the box's header is always the "natural" color.
 - This helps you identify where additional configuration is required before publishing the journey.
- Click this button to open the Event Settings panel on the right side of the page for the selected component.
 - The component whose settings are currently shown in the panel is highlighted on the canvas by having its border made bold.
 - Every component allows you to specify its Name and Description, though these are not required.
 - Whatever you enter in these fields also appears in the component's box on the canvas to help you identify each step.
 - The component's default name is always shown at the top of the Event Settings panel so you always know what type of component you are working with.
 - This is also shown to end users with access to the journey so they can review what each component does.
 - Every component has an Occurrence Limit section. The value set here determines how many times a contact can pass through the step. The limit may apply on either a per-contact, per-loan, or per-product basis.
 - By default, loan-related triggers are limited per loan and product-related triggers are limited per product, but either type can be switched to limit per contact.
 - Other components can only be limited per contact unless they are downstream of a loan-related trigger or a product-related trigger.
 - Triggers default to a value of 1. Other components default to the maximum value (9,999).



**Tip**


The smallest limit should be set as far upstream as possible to create a single bottleneck point. Downstream components then do not need to be limited.

- If a contact hits a component more times than the specified limit, they will stop and not proceed any further along the journey. If the component is a trigger, a contact that has reached the limit will not be added to the journey again.
 - Many components have one or more additional fields in the Event Parameters section. These may be required or optional. Required fields are marked with a red asterisk (*).
 - These parameters are described in the *Journey Component List*.
 - Triggers also have a Conditions section, where you can apply inline conditions to fine-tune which contacts are actually triggered onto the journey.
 - Inline conditions are always optional.
 - Occurrence Limit, Event Parameters, and Conditions sections are configured to display each completed selection as a human-readable sentence.
 - Click **Edit** or **Add Rule** to modify the selections.
 - Click the **Done** button to set your changes for each selection.
 - Click the **Save Event Settings** button at the bottom of the panel to apply all your changes and close the panel.
 - If the Description field is left blank when you save a component's settings, the component on the canvas displays the Event Parameters description, if applicable, instead of a blank description.
2. Copy
 - Click this button to create an exact duplicate of the component, including any settings you have already configured in the Event Settings panel. The duplicate appears directly below the original on the canvas and is not connected to any other components.
 3. Delete
 - Click this button to remove the component (and any links to or from it) from the canvas. After clicking this button, you are prompted to confirm the decision before the component is removed.

Tip

You can increase the amount of visible area on the canvas by collapsing the side panels.

• Click the **X** icon () at the left end of the header to collapse the main navigation menu. Click the hamburger button () to expand the menu.

• Click the **X** icon () in the currently selected tab to collapse the panel on the left side of the journey editor. Click any tab to expand the panel.



Triggers

A trigger is used to begin each journey. A trigger represents one of the following:

- A change related to a contact, product, or loan that happens in the Total Expert system
- An action taken by a contact or a change related to a contact on another part of the same journey

When a change matching the trigger condition occurs, the journey automatically adds the affected contact at the trigger point and proceeds to the next step. A trigger might or might not include inline conditions as part of its definition. Text entered in an inline condition is not case sensitive (for example, entering `TBD` or `tbd` would behave the same way).

Actions

An action is an executable step in a journey. It directs the system to perform a specified operation relating to the contact on the journey. When the action has been completed, the contact moves on to the next item in the workflow.

Note

An action in one journey could also trigger a separate journey or another workflow on the same journey.

Conditions

A condition is a fork in the workflow where multiple paths are possible, defined by a conditional rule. Depending on the value or status the rule determines, the journey will continue on only one of the possible paths. Text entered in a condition is not case sensitive (for example, entering `TBD` or `tbd` would behave the same way).

Events

An event is a delay built into the journey between any combination of triggers, actions, conditions, or other events. The journey will continue on to the next step when the specified condition is met.

Making Connections

Each component that has been dragged onto the canvas has one or more input connection points, output connection points, or both. These are indicated by gray half-circles; those on the left of a box are for inputs, and those on the right are for outputs. Each component has 1 input and 1 output with the following exceptions:

- Triggers have no inputs. They begin a journey or secondary workflow based on external factors.
- The Remove From Journey action has no output. It should be used to end a chain of logic in a journey.
- Conditions have 2 outputs (one for each path to be taken depending on the condition being checked).
- The Email Status event has 2 outputs. It behaves like a condition.
- Assign Task actions may have more than one output. Those multiple outputs can only be linked to Task Outcome events.
- The Split Test event may have more than one output.



Note

More than one component can feed into a single component's input point. Examples of the only components with multiple outputs are listed above.

Tip

You can use multiple triggers to feed into the same workflow. For example, you could connect both a Contact Updated trigger and a Manually Add Contact trigger to the same Assign a Group action. Any steps following from this action will proceed the same way regardless of which trigger was used.

Note

When several actions are chained in a sequence, inserting a Time Delay event about every 3–5 steps enables more efficient processing. The delay can be a token amount as little as 1 minute.

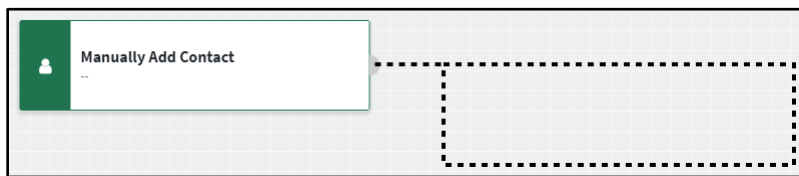
Tip

Use an instance of the Remove From Journey action at the end of each true endpoint in the workflow. This will ensure that each contact is properly removed from the journey and tracked appropriately for reporting purposes.

Using the Suggestion Box

The suggestion box provides a quick way to build the next sequential step from a component you have already placed on the canvas. It allows you to add a new component to the canvas, automatically connected to the previous component, by selecting the new component's type from a list of suggestions or a filterable list.

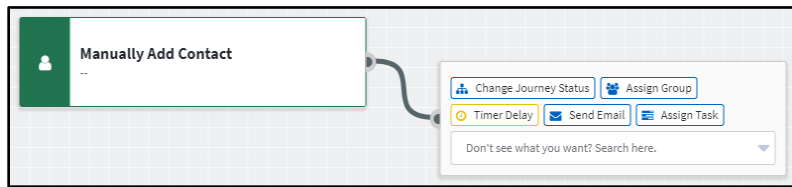
1. Drag a copy of the first component onto the canvas.
2. Hover the mouse pointer over the output point of the first component; notice that the output point is highlighted.
3. Click once here and move the pointer to an open location on the canvas; a dashed line beginning at the output point of the first component stretches to the pointer's location, where a dashed line box indicates where a new component will be placed.



Note

If there is not enough room to fit the entire box at the mouse pointer's location, the dashed line will not indicate the box. You cannot place a suggestion box at that location. Clicking at a place like this will cancel the attempt to create a connection.

4. Click to place the second component in the open location. A box appears with suggestions for possible components to follow the first. This suggestion box is already connected to the first component.



5. Use 1 of the following methods to select the new component from the suggestion box:
 - a. Click the name of a component from the list of suggestions.
 - The suggestions provided are generated automatically. They are the components used most often immediately after the first component in journeys created by all Total Expert users.
 - b. Click the drop-down menu and select a component name from the list.
 - Triggers are not listed because they cannot logically follow another component.
 - Available actions, conditions, and events are listed alphabetically within each category.
 - You can type in the box to filter the list.

When you select a component type, the suggestion box is converted to a component of the type you selected, and it is connected to the previous component.

If you want to remove a suggestion box, hover the mouse pointer over it and click the **Delete** button that appears. You are asked to confirm this just as you would when deleting any other component. Removing a suggestion box also removes the connection to the previous component.

Note

You cannot copy a suggestion box or edit parameters until it is converted to a specific component type.

Between Existing Components in a Journey

To create a logical connection between 2 components:

1. Drag a copy of each component onto the canvas.
2. Arrange them so that they are in logical order from left to right.
3. Hover the mouse pointer over the output point of the first component; notice that the output point is highlighted.
4. Click once here and move the pointer away from the box; a dashed line beginning at the output point of the first box stretches to the pointer's location.
 - Ignore the suggestion box outline when connecting to an existing component.
5. Hover the pointer over the input point of the second component; notice that the input point is highlighted.
6. Click once here; a solid line is drawn connecting the components. This connection is maintained even if you drag the components around the canvas.

When the dashed line is showing, you can cancel creating a connection by clicking in an empty space on the canvas where there is not enough room to show the suggestion box outline.



Removing a Connection

You can remove a completed connection by hovering the mouse pointer over it and clicking the **Delete** button that appears. This works the same way regardless of whether the components were created using the suggestion box or dragged to the canvas from the list.



A connection is also deleted if either of the components it connects is deleted.

With Other Journeys or Separate Workflows in the Same Journey

You can cause one journey to trigger another using an action in the first and a corresponding trigger in the second. For example, you could include a Remove Group action at the appropriate location in the first journey, selecting the relevant contact group in its parameters. Begin a new journey with the Removed From Group trigger, specifying the same contact group, and build the rest of the journey as usual. When a contact reaches the point in the first journey where they are removed from the selected group, the second journey will automatically detect this and trigger for that contact.

You can also create a second, unconnected workflow within the same journey. This type of workflow would typically begin with a trigger that is configured to check *Only for contacts already on this journey*, which would only monitor contacts that have already been added to another workflow in the same journey. For example, you could include a Change Journey Status action at a certain point in the main workflow, then begin a new workflow in the same journey with the Journey Status Change trigger, specifying the same status. When a contact on the main workflow reaches the point where the status is changed to the selected value, the secondary workflow will automatically detect this and trigger for that contact.

Warning

If a contact is removed from a journey (by the Remove From Journey action or manually from the contact record), they are removed from all workflows in the journey, not just the primary workflow.

Using Conditions with Triggers

A trigger component on its own adds any contact to a journey when they match the base definition of the trigger. For some triggers, particularly Contact Created, this could start more people on the journey than really should be on it. It is a good idea to reduce the number of contacts on a journey down to only the intended audience. There are 2 ways to do this: adding condition components after the trigger, or using inline conditions in the trigger itself.

Tip

Inline conditions are recommended to minimize cluttered data, as described below.



Separate Condition Components

You can filter some contacts off of a journey right away by adding one or more condition components immediately after the trigger and routing those that do not match directly to a Remove From Journey action.

This has the effect of preventing a contact from continuing on a journey that does not apply to them. It has the advantage of clearly showing in the visual workflow how contacts are evaluated and either removed or allowed to continue. However, any contact removed this way is still counted as having been on the journey. Thus, while the total number of conversions or failures is unaffected, the total number of contacts used to compute conversion and failure ratios is inflated, leading to misleading results.

Inline Conditions

You can achieve the same filtering effect without actually starting any unintended contacts on the journey. This is done with conditions that are part of the trigger itself, known as inline conditions.

Inline conditions are configured along with any other parameters of the trigger component. They can be defined in any way separate condition components can.

This approach has the minor drawback of being tougher to discern at a glance what conditions are evaluated because it happens entirely within the trigger component. However, it is preferred because it prevents unintended contacts from being started on the journey and counted in the total number who have been on it, so you will have more meaningful conversion and failure data.

Customizing Journey Settings

In addition to the settings available to define each journey component, you can define some settings that apply to the journey as a whole. To view and modify these, click the **Settings** tab in the left panel of the journey editor.

When you are finished making any changes in this panel, you must click the **Save Journey Settings** button at the bottom of the panel for the changes to take effect (clicking the Save Journey button in the header will *not* save these settings).

Journey Settings

The **Name** and **Description** fields display the current information for the journey. The name and description you entered when you created the initial draft are used unless they have been changed since then. You can change them here by simply editing the text in the boxes. When you save the changes in the Settings panel, the previous values are overwritten.

Tip

Give each journey a short, but descriptive, name so you can identify it in a list. Enter a longer, more detailed description that is visible to potential users of the journey on the journey list page and on the Templates tab.

Goal Settings

- **Target Conversion %** – Enter the percentage of contacts you expect to reach the Successful Campaign Conversion Status. (See Note below.)



- **Target Conversion Days** – Enter the number of days between when a contact begins on the journey and when you expect they should have reached the Successful Campaign Conversion Status. (See Note below.)
- **Successful Campaign Conversion Status** – Select a journey status from the drop-down list. When the journey status changes to this status for a given contact, the journey will be considered a successful conversion for that contact.
 - You can select any status you have created or one that has been shared with you by another member of your organization.
- **Failed Campaign Conversion Status** – Select a journey status from the drop-down list. When the journey status changes to this status for a given contact, the journey will be considered a failed conversion for that contact.
 - You can select any status you have created or one that has been shared with you by another member of your organization.
 - This should be a different status than what you selected for the Successful Campaign Conversion Status above.

Note

The Target Conversion settings are not currently tracked or reported; they will support future development.

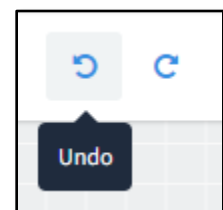
Tip

When building the journey on the canvas, you should only use the Change Journey Status action to set the Successful Campaign Conversion Status or the Failed Campaign Conversion Status at the end of a workflow. Then immediately follow that action with a Remove From Journey action to ensure that any contact captured as either successful or failed is not subsequently altered by having the status changed again in another part of the journey.

You can view the number of contacts currently at each step in an active journey by clicking its name on the journey list page. If you have access to edit the journey, this brings you to the journey editor for that journey; if you do not have access to edit the journey, you will see a read-only version of the journey. Either way, for active journeys, the components in this view include a number in a blue circle at the upper-right corner of the component, representing the number of contacts who are still active somewhere on the journey, but who have already passed that step. Once a contact reaches a Remove From Journey action (or are otherwise removed from the journey), that contact will no longer be counted at any step. Click the number to open a panel at the bottom of the page showing the list of all contacts counted at that step.

Undoing and Redoing Changes

When you are editing a journey, the system tracks up to 100 of your most recent changes in the current session. You can undo these changes, 1 at a time, by clicking the **Undo** button in the header bar. You can then redo these changes by clicking the **Redo** button (as long as no new changes were made after the undo action).



Actions recognized by the undo and redo actions include:

- adding a component to the canvas, including a suggestion box
- selecting a component type in a suggestion box
- removing a component from the canvas
- moving a component to a new location on the canvas



- adding a connection between components
- removing a connection between components
- updating the settings of a component

When you begin a new editing session, both the Undo and Redo buttons are grayed out, indicating that there are no changes to step through. (Even if you are opening a saved journey, you cannot undo changes made in a previous session.)

Once you make a change, the Undo button activates and turns blue, indicating that there is at least 1 change that you can undo. If you undo all the tracked changes, the Undo button turns gray again. Likewise, when you undo at least 1 change, the Redo button activates and turns blue; if you redo all the tracked changes, the Redo button turns gray again.

If you undo any changes and then make a new change, such as adding a new component, the Redo button becomes unavailable and the option to redo any steps that were undone is lost. This is consistent with standard undo/redo behavior in most software.

Tip

You can use the standard Windows keyboard shortcuts for undo and redo (**Ctrl + Z**) and (**Ctrl + Y**).

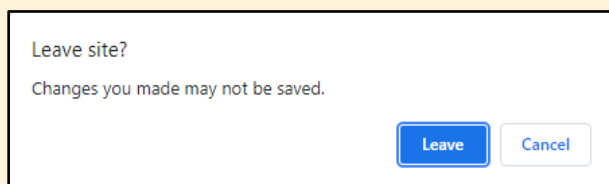
Saving Your Progress

At any point after starting to work on a journey, you can save your progress by clicking the **Save Journey** button in the header.

From the journey list page, select **Actions** → **Edit** to resume editing where you last saved.

Note

If you navigate away from the journey editor without saving, you are warned that if you continue, any work since the last time you saved will be lost. Click the **Leave** button if you want to leave the journey editor without saving; otherwise click the **Cancel** button to return to the editor so you can save before leaving.



You can only work with or view the current saved version of a journey. Prior saved versions are not archived.

Publishing a Journey

No part of a journey executes until the journey has been published and made active. When publishing a journey, you can either keep it for your own use only or share it with other users in your organization. When sharing, you can either share with all users in your organization or select individual users or teams who should have access.



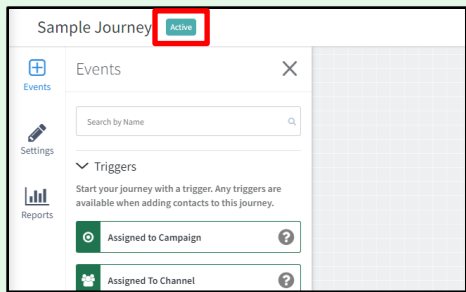
You must properly configure parameters for all the components in a journey before you can access the publishing options for that journey. Components with incomplete parameters are outlined in gray. If you attempt to select the Publish Journey option in a journey that is missing some required configuration, you will see an error message (“An operator is not configured correctly.”), and you will not be able to access the publishing options for that journey. You can click the message to directly open the Event Settings panel for 1 of the components identified as incomplete.

Note

The check for complete parameters does not check whether components are connected. You should check to ensure that workflows are properly defined with logical connections throughout before publishing.

Tip

The publishing status of a journey is displayed in the journey editor next to the name in the header bar. This is meant to help you understand whether you are editing a journey that has not yet been published (Draft), published but not active (Available), published and active (Active), or unpublished (Inactive).



Publishing for Your Own User Only

Follow these steps to create a journey that is active for only your own user. You might do this to test the journey in your own account before releasing it for other users to run or when you want to select specific users or teams who should have access to the journey.

1. On the canvas, build any components and connections that you want to have included in the journey.
2. Configure any desired settings, especially a meaningful name.
3. Click the **Save Journey** button.
4. Hover the mouse pointer over the drop-down arrow next to the Save Journey button and select the **Publish Journey** option.
 - a. If you see an error message indicating that one or more components require additional settings, add the necessary information and try again.
5. In the Publish and Access Settings panel on the right, select the **Do not grant access to this journey for any other users yet** option. The label changes from Draft to Available.
6. Click the **Save Settings** button.
7. Click the **Confirm** button in the confirmation box.
8. Select **Journeys** in the navigation menu.
9. Locate the journey in the list.
10. Select **Actions** → **Activate For Myself**.
11. Click the **Yes** button in the confirmation box. The label changes from Available to Active.



Publishing for All Users in Your Organization

Follow these steps if you want to give everyone in your organization (including yourself) access to a journey. You might do this with a general-purpose journey, such as a birthday and holiday campaign.

1. On the canvas, build any components and connections that you want to have included in the journey.
2. Configure any desired settings, especially a meaningful name.
3. Click the **Save Journey** button.
4. Hover the mouse pointer over the drop-down arrow next to the Save Journey button and select the **Publish Journey** option.
 - a. If you see an error message indicating that one or more components require additional settings, add the necessary information and try again.
5. In the Publish and Access Settings panel on the right, select one of the following options, depending on whether or not you want the journey to run automatically as soon as it is published:
 - a. **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 with the Available label and will have the option to activate the journey for their own use. (You will not be able to see which users have done so.)
 - b. **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 with the Active label.

Regardless of which of the above options you choose, 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. (This option is required when publishing the journey as *available*.)
 - **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. See Manual Journey Actions below.
 - **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. See Manual Journey Actions below.
6. Click the **Save Settings** button.
 7. Click the **Confirm** button in the confirmation box.

The journey is now listed on the journey list page with either the Available or Active label (depending on which option you chose in step 5) for every user in your organization.

Publishing for Selected Users or Teams

Follow these steps if you want to give access to a journey only to individual users or members of teams you specify.



Note

The first 9 steps below are identical to those under Publishing for Your Own User Only above.

1. On the canvas, build any components and connections that you want to have included in the journey.
2. Configure any desired settings, especially a meaningful name.
3. Click the **Save Journey** button.
4. Hover the mouse pointer over the drop-down arrow next to the Save Journey button and select the **Publish Journey** option.
 - a. If you see an error message indicating that one or more components require additional settings, add the necessary information and try again.
5. In the Publish and Access Settings panel on the right, select the **Do not grant access to this journey for any other users yet** option.
6. Click the **Save Settings** button.
7. Click the **Confirm** button in the confirmation box.
8. Select **Journeys** in the navigation menu.
9. Locate the journey in the list.
10. Select either **Actions → User Settings** or **Actions → Team Settings**.
11. On the User Settings or Team Settings page, check the boxes next to the names of the users or teams to whom you want to grant access for this journey.
12. Click the **Change Settings** button at the top of the page.
13. In the slide-out panel's Access Settings section, select the **Add Access** option. (See Denying and Clearing Access for Selected Users or Teams below for details on the Deny Access and Clear Access options.)
14. In the Journey Settings section, check *only one* of:
 - a. **Activate for all users.** – When you publish, this will make the journey active immediately for the selected users or members of the selected teams.
 - b. **Available to activate (opt-in) and deactivate (opt-out)** – When you publish, this will make the journey available for the selected users or members of the selected teams, where they will each have the option to activate and deactivate the journey for their own use. (You will not be able to see which users have done so.)
15. (Optional) Check *either or both* of:
 - a. **Allow users to stop this journey.** – This will allow any user running the journey to manually remove a contact from the journey via the contact's details page.
 - b. **Allow users to trigger scheduled events on this journey.** – This will allow any user running the journey to manually bypass the currently pending journey step for a contact via their details page.
16. Click the **Submit** button at the top of the slide-out panel.

The journey is now listed on the journey list page with either the Available or Active label (depending on which option you chose in step 14) for the users or members of the teams you selected in step 11.

You can remove access for users or teams by following the same steps, except selecting **Deny Access** at step 13. User settings override team settings, and team settings override organization settings. So if a journey is made available to a team, but specifically denied to a user who belongs to that team, that user will not see the journey in their list, because the user setting takes precedence.



Denying and Clearing Access for Selected Users or Teams

Follow these steps if you want to change access to a journey only to individual users or members of teams you specify. This assumes the journey has already been published.

You can assign access to a journey at the organization, team, or user level. At each level, access can be added, denied, or neither (cleared). When you initially publish a journey (for your own user only or for all users in your organization), team and user settings are neither added nor denied. When set, 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 denied to the whole organization and 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.

1. On the journey list page, select either **Actions → User Settings** or **Actions → Team Settings**.
2. On the User Settings or Team Settings page, check the boxes next to the names of the users or teams to whom you want to change access for this journey.
3. Click the **Change Settings** button at the top of the page.
4. In the slide-out panel's Access Settings section, select either the **Deny Access** or **Clear Access** option. When either of these is selected, the remaining publishing options are not shown.
 - a. **Deny Access** – This specifically prevents the selected users or teams from having access to the journey. Setting this at the team level can be overridden by adding access for specific users.
 - b. **Clear Access** – This removes the previous setting (either added or denied) for the selected users or teams. The highest remaining level with a setting determines their access.
5. Click the **Submit** button at the top of the slide-out panel.

Creating a Template

If you plan to use a similar process in multiple journeys, or if you want other users to make journeys with shared elements, you can create a journey template. This ensures that the parts in common will be identical (unless later edited) and saves time creating additional journeys compared to making them from scratch.

The workflow on the canvas does not have to be complete for you to create a template; however, you cannot edit user and team settings or publish the journey if any components have incomplete required parameters.

You can create and distribute a template without publishing via user or team settings or while publishing a full standalone journey.

Creating a Template Only

Creating a template does not require the journey to be published. To save a journey and make it available as a template for selected users or teams without publishing:

1. On the canvas, build any components and connections that you want to have included in the template.
2. Configure any desired settings, especially a meaningful name.
3. Click the **Save Journey** button.



4. Select **Journeys** in the navigation menu.
5. Locate the journey in the list and select either **Actions → User Settings** or **Actions → Team Settings**.
6. On the User Settings or Team Settings page, check the boxes next to the names of the users or teams to whom you want to grant access for this journey.
7. Click the **Change Settings** button at the top of the page.
8. In the slide-out panel's Access Settings section, select the **Add Access** option.
9. In the Journey Settings section, check the **Available as a template** option.
10. Click the **Submit** button at the top of the slide-out panel.

Note

You can also publish the journey as active or available for the selected users or teams while creating a template with this method. Select appropriate publishing options before submitting the form.

The selected users or members of selected teams will see the template in their list of available templates.

Publishing as a Journey While Creating a Template

To simultaneously publish as a working standalone journey and create a template for all users in your organization:

1. On the canvas, build any components and connections that you want to have included in the journey.
2. Configure any desired settings, especially a meaningful name.
3. Click the **Save Journey** button.
4. Hover the mouse pointer over the drop-down arrow next to the Save Journey button and select the **Publish Journey** option.
 - a. If you see an error message indicating that one or more components require additional settings, add the necessary information and try again.
5. In the Publish and Access Settings panel on the right, select either **Grant access to this journey for all users, but have them activate it for themselves later** or **Grant access and activate this journey for all users**, depending on how you want the journey to behave. Select other options as appropriate.
6. Check the box under **Template Settings**.
7. Click the **Save Settings** button.
8. Click the **Confirm** button in the confirmation box.

Every user in your organization will see the template in their list of available templates and will see the journey on the journey list page with either the Available or Active label, depending which option you selected.

Using a Template

Regardless of how many users have access to a template, once it has been made available, users with access to it can make use of it when starting a new journey. You can do this from the Actions menu on the journey list page or by using the classic journey editor.

Starting from the Journey List

1. Select **Journeys** in the navigation menu.
2. Locate the journey you want to use as a template and select **Actions → Copy Journey**.



Note

This option is only available for journeys you have created or journeys shared with you that are designated as templates.

3. In the Copy Journey box:
 - a. Note the information presented: All components (including their settings) and connections will be copied to a new journey, but the new journey will be created as a draft with no access for any other users.
 - b. The **New Journey Name** field is populated with the name `Copy of [original journey name]`. Replace this with a suitable name for the new journey.
 - c. Click the **Copy** button.
4. The copied journey is added to the list. Select **Actions** → **Edit** to open the journey and work with it as usual.

Tip

You may have to scroll to the bottom to find the new journey with the Draft label. Use the pagination controls at the bottom of the page if there are more than 25 journeys listed.

Using the Classic Journey Editor

Note

The classic journey editor is maintained for backwards compatibility reasons for legacy users only. It is not recommended for new users.

1. Select **Journeys** in the navigation menu.
2. Click the **Create Journey** button.
3. Enter a name and description for the journey that will use the template.
4. At the right end of the header bar, click the **Go to Classic Journey Editor** button. The journey editor switches to the classic user interface, which includes a Templates tab in the left panel.
5. Click the **Templates** tab.
6. Locate the template by name and description in the list.
7. Click the corresponding **Use Template** button.
 - a. The entire journey workflow defined in the template is copied to the canvas for the current journey.
8. Click the **Save Journey** button. Your changes will be lost if you navigate away from the journey editor without saving. However, once saved, you can edit the updated journey in the current user interface.

Tip

Import the template before adding anything to the canvas. When importing a template, any components and connections already on the canvas will be cleared and replaced by the contents of the template. However, anything you have entered on the Settings tab is retained.

Unpublishing a Journey

At some point you may decide you want to stop using an active journey. At that point, you can unpublish it. When you unpublish a journey, it is not deleted—merely deactivated. As a result, you can republish a journey after it has



been unpublished. You can edit a journey before republishing it, so you can use this as an opportunity to modify a journey in an environment where contacts on the journey will not be affected by each change.

Note

A contact who is in the midst of a journey will have their progress suspended when it is unpublished.

- If the journey is republished without modifying the step the contact was on, the contact's progress is resumed at the point where they left off.
- If the journey is republished after modifying the step the contact was on, the journey is resumed for the contact, but they do not have a way to advance; they are "stuck" until the journey is manually stopped for the contact.
- If the journey is not republished, the journey is effectively ended for the contact.

To unpublish a journey:

1. Select **Journeys** in the navigation menu.
2. Locate the journey you want to unpublish and select **Actions → Deactivate For Myself**.
3. Click the **Yes** button in the confirmation box.

Tip

This action only unpublishes the journey for yourself. If you want to stop the journey for all users with access to it, modify the user settings for the journey and select **Deny Access** for all users.

The journey's label changes from Active to Inactive.

Once a journey is unpublished, you can edit it and save a draft without republishing it, you can republish it without edits, or you can republish a new draft. The editing, saving, and publishing options are the same as those for a saved journey that has never been published.

1. Select **Journeys** in the navigation menu.
 2. Locate the journey you want to work with and select either:
 - a. **Actions → Edit** – The journey editor accessed here is the same as that used to create a new journey or edit a saved draft.
 - b. Edit, save, and eventually publish the journey as you would with a new journey.
- or
- a. **Actions → Activate For Myself**
 - b. Click the **Yes** button in the confirmation box. The journey's label changes from Inactive to Active.

Copying a Journey

You can create an exact duplicate of an existing journey in your list. This creates a new journey, which is completely autonomous from the original. Each can be modified, published, or deleted without affecting the other.

1. Select **Journeys** in the navigation menu.
2. Locate the journey you want to duplicate and select **Actions → Copy Journey**.
3. Enter a name for the new journey in the **New Journey Name** field.



- By default, the words **Copy of** are added to the beginning of the existing journey's name. You can use this name or modify it however you like.

4. Click the **Copy** button.

The new journey is created and added to your list. (You might need to apply sorting or filtering to locate it; see [Sorting and Filtering the Journey List](#) above). The new journey has the same components in same arrangement as the original and with the same settings applied. The journey settings are also retained. However, the new copy is always created as a new draft that is unpublished, regardless of the publishing status of the original. Users with access to the original will not see the new copy.

Deleting a Journey

1. Select **Journeys** in the navigation menu.
2. Locate the journey you want to delete and select **Actions** → **Delete Journey**.
3. Click the **Yes** button in the confirmation box.

The journey is permanently removed from your list and the list of any other users who had access to it.

Journey Reports

You can create one or more reports for a journey to provide some insight into its effectiveness.

1. Select **Journeys** in the navigation menu.
2. Click the name of 1 of the listed journeys.
3. In the journey editor (or read-only page if you do not own the journey), click the **Reports** tab in the panel on the left side.
4. Click the **+Add report** button at the top of the Reports panel. A section for the new report is added to the panel.
5. In the report editing section, enter a name for the report in the **Name** field.
6. (optional) In the **User Filter** field, select 1 or more of the users in your organization. The report will show results only for contacts added to the journey by those users.
7. (optional) In the **Team Filter** field, select 1 or more of the teams in your organization. The report will show results only for contacts added to the journey by members of those teams.
8. Use the **Only count unique contacts** toggle switch to select which type of counting the report should use. (The numbers reported are derived from the journey's components that you will select next.) This selection applies to all components selected for this report. The options are:
 - a. **Yes** – The report will display the total number of unique contacts to pass through the components you will select next.
 - b. **No** – The report will display the total number of times that the components you will select next have executed, including duplicate contacts.
9. In the **Events** section, select the name of a component from the journey in the first drop-down list. You can select any trigger, action, or event, but conditions are not available.
10. Repeat the previous step for any additional components you want to add to the report. You can add or remove slots by clicking the **+Add event** button below or the **delete** button (trash can icon) to the right of each slot. (You must delete any unused slots.) You can also reorder the slots by clicking and dragging the hamburger button to the left of the slot up or down the list.

**Tip**

Give components unique names when building them to help discern among different components of the same type when building a report.

- a. You must include at least one component; otherwise you can select as many or as few components as you want, up to a maximum of all the available components in the journey.
 - b. You can select each component only once. Components that have already been added to the report are grayed out in the drop-down list.
11. (optional) Check the **This report should be visible for all users on this journey.** box if you want all users with access to the journey to be able to see the report. (The creator of the journey will see results for all contacts for all users; other users will only see results based on their own contacts on the journey.) Leave it unchecked to prevent any other users from seeing the report.
 12. Click the **Done** button at the bottom of the panel. The report editor closes, and the finished report appears in its place.

You can modify or remove a completed report by clicking the **Edit** or **Delete** buttons in its tile, respectively. These changes affect all users with access to the report.

Note

You can create multiple reports for a journey, but you can only edit one report at a time. While you are creating a new report or editing an existing one, the +Add report button and the Edit buttons for any other existing reports are all disabled.

Each time you refresh this view of the journey, the reports panel will update with current numbers based on the use of the journey to date.

Manual Journey Actions

Triggering a Journey

Any user who has a journey on their journey list page with the Active label can manually add a contact to that journey, beginning at any point in the journey where there is a trigger. If there are multiple triggers, you can select which trigger where you would like to begin that contact on the journey. You can only have a contact start a journey at a trigger, not at an action, condition, or event.

For example, suppose a journey has one trigger that starts a contact on the journey when they are assigned to a contact group and a second trigger farther along that requires adding the contact to the journey manually. When a contact is assigned to the group, they automatically start the journey at the first trigger. However, you can add any contact to the journey manually at either trigger. This would be useful if an existing contact had been assigned to the group before the journey was published. In this case, the contact would not be added to the journey automatically, because the trigger only checks for new additions to the group, not existing members. You could add them to the journey manually to begin at the Assigned to Group trigger. The contact would then proceed through the workflow as if they had been added to the journey automatically by that trigger.

**Note**

Even when adding a contact to a journey manually, if the selected trigger includes inline conditions, then the contact would only be added to the journey if they satisfy those conditions. For a contact that does not satisfy the conditions, manually adding the contact would appear to succeed, but then nothing further would happen because the trigger's conditions would prevent them from being added to the journey.

To add a contact to a journey manually:

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the desired contact in the list.
3. On the contact details page, click the **Marketing** tab.
4. Click the **Add to Journey** button.
5. In the Add Contact to Journey box, select the name of the journey you want to add the contact to from the **Journey** drop-down list.
6. The box expands to show a list of all the triggers in the selected journey. Click the desired trigger to select it.
7. Click the **Submit** button to confirm your selection and start the contact on the journey.

When the contact details page refreshes, the Active Journeys section on the Marketing tab updates to show the selected journey and the contact's current progress. The Activity tab lists a Journey Triggered event that shows the name of the journey and the trigger type.

Note

The system may require some time to process this.

You can also add one or more contacts to a journey directly from the contacts list page.

1. Navigate to **Leads & Contacts → Contacts**.
2. Select the checkboxes for the desired contacts.
3. Select **Actions → Configure journeys → Add a journey**.
4. In the slide-out panel, select the name of the journey you want to add the contact(s) to from the **Select A Journey To View Starting Points** drop-down list.
5. The panel lists all the triggers in the selected journey. Click the desired trigger to select it.
6. Click the **Submit** button at the top of the panel.
7. Click the **Ok** button in the confirmation box to start the contact(s) on the journey.

Triggering a Pending Step

When publishing a journey, the creator has the option to allow users of the journey to trigger the next pending step for a contact on the journey. This means that if the user wants to intervene and cause a contact to skip to the next step in the journey, they can do so. This would be useful if the journey contains a Time Delay event, but you want to skip it for a particular contact. For example, if a journey is set up to wait 3 days before sending another message to a contact, but the contact responds and expresses an interest in moving ahead, the user running the journey would be able skip the delay for the contact to send them to the next step immediately.

To manually trigger a step for a contact on a journey:



1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the desired contact in the list.
3. On the contact details page, click the **Marketing** tab.
4. In the Active Journeys section, under Pending Events, a box contains the details of the next step in the journey for the contact. This includes:
 - The type of step
 - The description in the component
 - The time and date the contact reached the pending step
 - The time and date the contact will advance automatically without being triggered manually
 - A Cancel button
 - A Trigger now button
5. Click the **Trigger now** button.
6. Click the **Ok** button in the confirmation box.

Note

This only affects the selected contact at their current step. It would not affect other contacts on the same journey, nor can you cause the selected contact to skip multiple steps at once. You would have to perform the above procedure again to skip an additional step in the journey.

Warning

Clicking the Cancel button for the step will prevent the contact from working any further along the journey, but does not remove them from the journey. (You can then remove them manually—see Removing a Contact from a Journey below.)

You will be prompted to confirm this action before it takes effect.

When you publish a journey for your own use, you will always be able to trigger the next pending step in that journey for a contact. However, if the journey was created by another user, this option may not be available.

Specifying a Co-Marketer

For a contact on a journey, you can specify a co-marketing partner to appear in any remaining co-branded marketing pieces that the journey is configured to send to the contact. If there are no co-branded pieces used in the journey, this selection has no effect.

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the desired contact in the list.
3. On the contact details page, click the **Marketing** tab.
4. In the Active Journeys section, under Co-marketing Partner, click **Add**.
5. In the Add Co-Marketing Partner box:
 - a. Select 1 of your co-marketing partners from the drop-down list.
 - b. Click the **Save** button.

Once a co-marketing partner has been selected for the journey, that person's name appears with an Edit option in place of the Add option. Click **Edit** and select a different user if you want to change the partner on any co-branded materials sent to this contact by this journey.



Removing a Contact from a Journey

When publishing a journey, the creator has the option to allow users of the journey to remove a contact from the journey. This means that if the user wants to prevent a contact from having any further involvement with the journey, they can do so.

To manually remove a contact from a journey:

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the desired contact in the list.
3. On the contact details page, click the **Marketing** tab.
4. The contact may be on more than one journey. All journeys that the contact is on are listed in the Active Journeys section. Locate the journey you want to remove the contact from.
5. Click the corresponding **Stop** button.
6. Click the **Ok** button in the confirmation box.

Note

This only affects the selected contact on the selected journey. It would not affect other contacts on the same journey, nor does it remove the contact from any other journeys they may be on.

When you publish a journey for your own use, you will always be able to remove a contact from that journey. However, if the journey was created by another user, this option may not be available.

Filtering the Contact List

You can filter the contact list based on journey-related criteria directly from the contact list's filter panel.

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **Filter** button in the upper-right corner of the page.
3. In the Filter Contacts panel, you can build Inclusion Rules and Exclusion Rules based on various criteria to determine which contacts should be shown on or hidden from the contact list, respectively. The criteria in the Journey section are:
 - **Currently Active Journey** – This option lets you select any journeys (and/or campaigns) with at least 1 contact still on it. This would mostly include active journeys (and running campaigns), but could also include journeys that have been made inactive while any of your contacts were still on the journey. When used in an inclusion rule, this will show contacts in the filtered list if they are currently on any step of 1 or more of the selected journeys (or campaigns).
 - **Ended Contact Journey** – This option lets you select any journeys (and/or campaigns) that have had at least 1 contact on them who no longer is. This would include active or inactive journeys with contacts who were removed manually or who were removed by an action within the journey (and campaigns that are stopped or completed). When used in an inclusion rule, this will show contacts in the filtered list if they had been on 1 or more of the selected journeys (or campaigns).
 - **Include Journey** – This option lets you select any journeys (and/or campaigns) that have had at least 1 contact on it at any time. It effectively combines the 2 criteria above into a single option. When used in an inclusion rule, this will show contacts in the filtered list if they have ever been on 1 or more of the selected journeys (or campaigns), regardless of whether they still are or not.



- **Status** – This option lets you select any of your journey statuses. This includes statuses you created yourself and those created by others and made available to you. When used in an inclusion rule, this will show contacts in the filtered list if they are currently assigned one or more of the selected statuses in any journey.

Note

These filter criteria are controlled by permission. Check with your system administrator if you do not see an option you expect.

Selecting a Task Outcome

When a task generated by a journey includes a set of outcomes to choose from, the user who is assigned the task must indicate which outcome applies before the journey advances to the next step. You can do this from either the task list or the contact details page for the contact on the journey.

From the Task List

1. Navigate to **Tasks → Tasks**.
2. Locate the journey-generated task in the list. Use the sorting and filtering options if necessary.
3. In the Actions column, select click the ellipsis button [...] and select **Update** from the drop-down list.
4. In the Task Details box, select the appropriate outcome from the **Select Outcome** drop-down list.
5. Click the **Ok** button in the confirmation box.

The task is marked complete, the outcome selection is logged in the Activity Stream, and the journey advances to the next step on the path determined by the selected outcome.

From the Contact Details Page

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the desired contact in the list.
3. On the contact details page, expand the **Tasks** section on the right side.

Note

The Active Journeys section on the Marketing tab shows that the journey is awaiting a task outcome selection and shows the possible outcomes, but you cannot select an outcome from that section.

4. Locate the journey-generated task in the list.
5. Select the appropriate outcome from the **Select Outcome** drop-down list.
6. Click the **Ok** button in the confirmation box.

The task is marked complete, the outcome selection is logged in the Activity Stream, and the journey advances to the next step on the path determined by the selected outcome.

Journeys in Focused Views

Focused Views also let you see and work with the journeys a contact is on. In any view shown on either the Standard or Custom tab at **Leads & Contacts → Focused View**, expand a contact row. The 4th column has the heading *Active Journeys (#)*, where # is the number of journeys that contact is currently on. A summary of the most



recent of these is shown below this heading. Click the **View all journeys >** button at the bottom of the column to open a slide-out panel where you can view the full details of all the journeys that contact has been on and perform journey-related actions.

To add the contact to another journey:

1. At the top of the panel, click the **+Add Journey** button.
2. Select the name of the journey you want from the **Journey** drop-down list.
3. (optional) Select a co-marketer whose information should appear on any co-marketed materials in the journey from the **Co-Marketer** drop-down list.
4. Select the option for the trigger in the selected journey you want the contact to begin from.
5. Click the **Save** button.

In the list of active journeys, you have similar options to those described under Manual Journey Actions above. These are, again, dependent on the journey setup and selections made by the user who published the journey.

- Set a journey status

Note

Use this feature with discretion. If your journey makes careful consideration of when to update statuses automatically, you should not have to update them manually. In the event you do need to make a manual update, be sure to select a status that makes sense for the affected contact.

- Select a co-marketer
- Cancel or trigger a pending event
- Stop the journey

Below the list of active journeys, click the **Show Ended Journeys (#)** button, where # is the number of journeys the user has reached an end state for or has been removed from.

- A list expands showing the details of each journey the contact is no longer on, including start and end times.

The information and actions in this panel should help provide valuable context as you reach out to contacts listed in your Focused View.

Example Use Case: Send Email to New Contact from Zillow

This example illustrates how to set up a journey that automatically sends an email to any new contact added from Zillow. It uses a trigger, a condition, actions, an event, and journey statuses.

Note

When dragging conditions from the Events panel, you may need to expand the section by clicking the **Show All** button to see the relevant component.

1. Select **Journeys** in the navigation menu and click the **Create Journey** button.
2. In the Create Journey box:
 - a. Enter `Send Email to Zillow Leads` in the Name field.

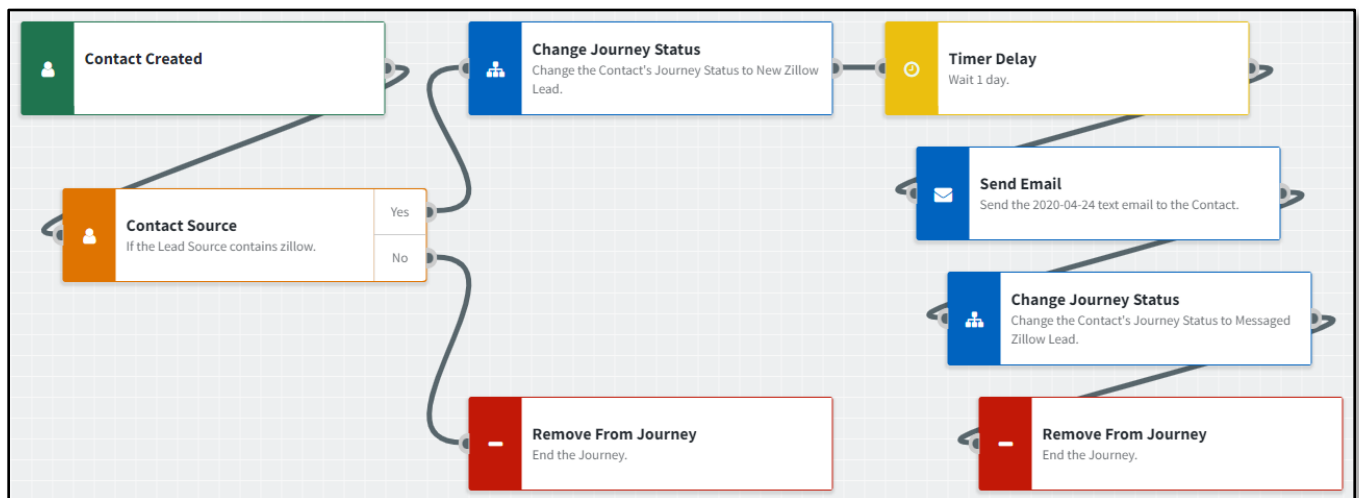


- b. Enter `Automatically sends an email to any new lead from a Zillow source.` in the Description field.
 - c. Click the **Save** button.
 3. Select the **Events** tab in the left panel if the journey editor does not automatically open it.
 4. From the Triggers section of the component list, drag a **Contact Created** trigger onto the canvas.
 - a. Note that this component requires no further configuration.
 5. From the Conditions section, drag a **Contact Source** condition onto the canvas.
 - a. If the Event Settings panel does not open automatically, or if you closed it, hover the mouse pointer over the Contact Source condition and click the **Edit** button.
 - b. In the slide-out panel's Event Parameters section, skip the Contact Source field.
 - c. Enter `zillow` in the **Value** field.
 - d. From the **Comparison** drop-down list, select **Contains**.
 - i. This combination will match any lead whose lead source has "zillow" anywhere in its name.
 - e. Click the **Done** button in the Event Parameters section.
 - f. Click the **Save Event Settings** button at the bottom of the panel.
 - g. Connect the output point of the trigger to the input of this condition on the canvas.
 6. From the Actions section, drag a **Change Journey Status** action onto the canvas.
 - a. Click the **Edit** button for this component.
 - b. In the slide-out panel, click the **Create New** link below the Lead Status field.
 - i. In the dialog box, enter the name `New Zillow Lead` for the status.
 - ii. Click the **Submit** button at the bottom of the box.
 - iii. Your new status is selected in the Lead Status field.
 - c. Click the **Done** button in the Event Parameters section.
 - d. Click the **Save Event Settings** button at the bottom of the panel.
 - e. Connect the Yes output point of the condition to the input point of this action.
 7. Click the **No** output point of the condition and click an empty area of the canvas to place a suggestion box connected to that output point.
 8. In the suggestion box, either:
 - a. Select a **Remove From Journey** component from the available options.
 - b. Use the search box to locate this component type and select it in the list.
 9. From the output point of the Change Journey Status action, place a suggestion box and select a **Timer Delay** event.
 - a. Click the **Edit** button for this component.
 - b. In the slide-out panel, enter `1` in the **Time Limit** field.
 - c. From the **Time Increment** drop-down list, select **Days**.
 - d. Click the **Done** button in the Event Parameters section.
 - e. Click the **Save Event Settings** button at the bottom of the panel.
 10. From the output point of the Timer Delay event, place a suggestion box and select a **Send Email** action.
 - a. Click the **Edit** button for this component.
 - b. In the slide-out panel, click the **Select email** button.
 - i. In the gallery, locate the desired email message. You can search for it by typing in the search box at the top.
 - ii. Click the **Select** button for the desired message. The gallery closes and the message is added to the settings panel for the component.



- c. Click the **Done** button in the Event Parameters section.
 - d. Click the **Save Event Settings** button at the bottom of the panel.
 11. From the output point of the Send Email action, place a suggestion box and select a **Change Journey Status** action.
 - a. Click the **Edit** button for this component.
 - b. In the slide-out panel, click the **Create New** link below the Lead Status field.
 - i. In the dialog box, enter the name **Messaged Zillow Lead** for the status.
 - ii. Click the **Submit** button.
 - iii. Your new status is selected in the Lead Status field.
 - c. Click the **Done** button in the Event Parameters section.
 - d. Click the **Save Event Settings** button at the bottom of the panel.
 12. From the output point of the Change Journey Status action, place a suggestion box and select a **Remove From Journey** action.
 13. Click the **Save Journey** button.

One possible configuration of the canvas resulting from these steps is shown below.



Exercises

1. Add custom descriptions to all components using the Description field in the settings panel. Notice how the automatically generated descriptions shown in the components on the canvas are overridden.
2. Remove the connection between the Timer Delay event and the Send Email action. Add a condition here that checks whether the contact has an email address. If they do, connect them to the remainder of the existing journey. If not, add an action to assign yourself a task to collect the information before proceeding.
3. Replace the Contact Source condition and the first Remove From Journey action with an inline condition in the Contact Created trigger that performs the same check.