



Journey Quick Reference Guide

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Overview

The general process of creating a journey from scratch consists of a few basic concepts, which are described in detail in the following sections.

1. Create and save a new journey.
2. Set up the new journey, including its workflow components and connections, on the canvas. Define settings as appropriate.
3. Publish the new journey. You can make the journey active or available for any combination of users or teams in your organization who should have access to it.

If you want to make your journey available to other users to use as a template for further new journeys, you can do so while publishing the journey. Users with access can then use your template as a starting point to build on, customize, and publish as a separate journey.

Note

Most Total Expert features, including individual parts of the journey system, are controlled by permissions; your system may differ from what is described in this document. Check with your system administrator if you have questions.

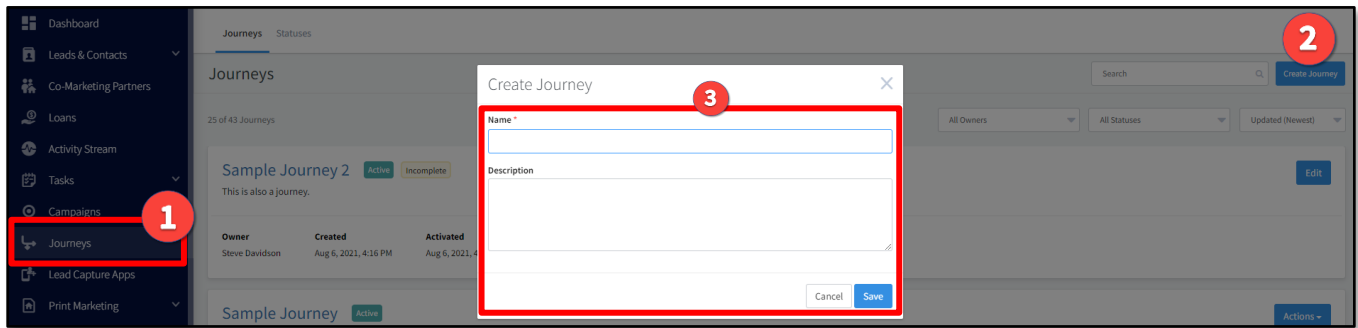
For a more complete discussion of all aspects of building and using journeys, see *Journey Manual*.

Creating a New Journey

To create a journey from scratch:



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 succinct name for the journey in the **Name** field. This should be descriptive enough to help users identify it in the journey list or contact records.
 - b. (optional) Enter a more complete description of the journey's function in the **Description** field. This is visible to potential users of the journey on the journey list page and in the list of templates to help those users decide how they want to use the journey.
 - c. Click the **Save** button.



4. The journey editor opens. Build the journey according to your needs using any available components.

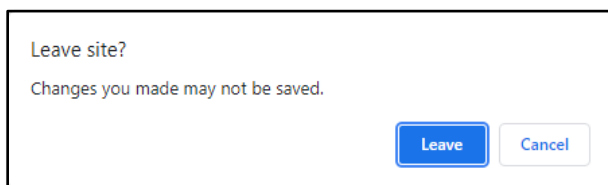
Note

The new journey is immediately available in the journey list page.

Saving a Journey and Opening a Saved Journey

You can continue customizing right away or return to work on the journey further later. Either way, it is a good idea to save your work often by clicking the **Save Journey** button in the upper-right corner of the screen.

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.



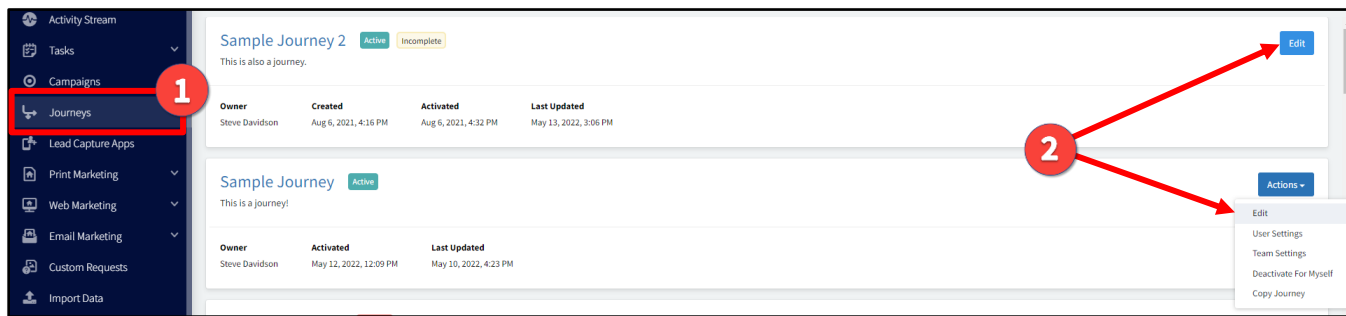
Once you save the journey, it is visible in your journey list. This page lists any journeys that you have access to, including those you created and those that others created and granted you access to. You cannot see other users' journeys, and they cannot see yours (unless access has been granted).

To continue working on a saved journey:

1. Select **Journeys** in the navigation menu.
2. Depending on your access level, either:



- a. Click the **Edit** button.
 - b. Select **Actions** → **Edit**.
3. Edit the journey as desired, remembering to save your work frequently.



Setting Up a Journey

You can take advantage of existing things you already have set up in Total Expert, such as journey statuses, email templates, tasks, or contact groups. However, the user who runs the journey may not be able to reference the same things as the user who created it. So, it is important to ensure that anything referenced in any step is available to users who will run the journey. Names must match exactly.

For example, attempting to send an email called “Prospects” will fail if the end user only has an email called “New Prospects”. This would cause the journey to “get stuck” at this step, and the user would not be alerted that this has happened. Before publishing, review each step in the workflow to ensure that it will work as expected.

An exception to this is that a step assigning a contact to a group will create the referenced group if it does not already exist for the user running the journey.

It will also be helpful to think beforehand about the things you will need to create. You will save time by having them set up already, so you can reference them as you work on the journey.

Also think about how you bring data into the Total Expert system. Create lead sources and groups accordingly. Use these to make appropriate references when creating journeys to help think about how contacts should be assigned to and removed from groups.

Creating a Journey Status

You can use journey statuses to track a contact’s progress through a journey. To create a journey status:

1. Select **Journeys** in the navigation menu.
2. Click the **Statuses** tab at the top of the page.
3. Click the **Create Status** button in the upper-right corner of the page.



Name	Lead Count	Created At	Updated At
new	3	Mar 29, 2018, 5:07 PM	
in progress	1	Mar 29, 2018, 5:07 PM	
closed - success	6	Mar 29, 2018, 5:07 PM	Jul 16, 2018, 12:49 PM

4. In the Campaign Status Settings box, enter a name and description that will help you identify the status.
5. (Optional) Check the **Make available to organization.** box if you want other users in your organization to be able to use this status.
6. Click the **Submit** button.

Campaign Status Settings

Make available to organization. 5

Name 4

Description

Submit 6

You can also create a status while editing a journey.

1. Place a **Journey Status Change** trigger or **Change Journey Status** action on the canvas.
2. If the settings slide-out panel does not automatically open on the right side of the page, hover the mouse pointer over the new component and click the **Edit** button to open it.
3. Below the Lead Status field, click the **Create New** link.
4. A dialog box opens in front of the canvas. Fill out and submit the form to create a status as described above.
5. After submitting, you are returned to the original panel where your new status is selected. Click the **Done** button.
6. Click the **Save Event Settings** button at the bottom of the panel.



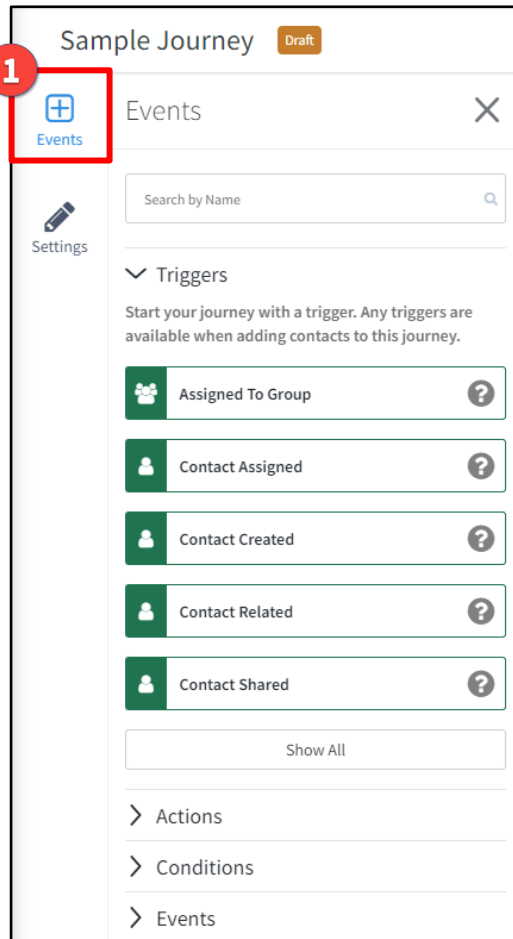
The screenshot shows the 'Sample Journey' interface. On the left, the 'Events' panel lists various actions, with 'Change Journey Status' highlighted by a red circle and arrow labeled '1'. A context menu for this event is open, showing 'Edit', 'Copy', and 'Delete' options, with 'Edit' highlighted by a red box and circle labeled '2'. On the right, the 'Event Settings' panel is shown for 'Change Journey Status'. It includes fields for Name, Description, Occurrence Limit, and Event Parameters. The 'Lead Status' dropdown is highlighted by a red box and circle labeled '3', with a 'Create New' button below it. The 'Done' button is highlighted by a red circle labeled '5'. The 'Save Event Settings' button at the bottom right is highlighted by a red circle labeled '6'.

The screenshot shows the 'Campaign Status Settings' form. A red box highlights the entire form area, with a red circle labeled '4' in the top right corner. The form includes a checkbox for 'Make available to organization.', fields for 'Name' and 'Description', and a 'Submit' button at the bottom left.

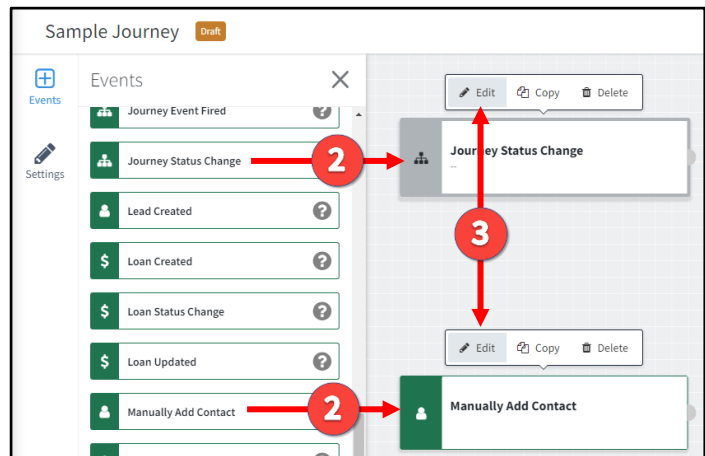
Updating the Workflow

When you are working on a new or saved journey, you must configure and connect any steps you add to the workflow so that the journey is logically complete and fully configured before you can publish the journey.

1. With the canvas for a journey open, click the **Events** tab, if not already selected.



2. Add any desired triggers, actions, conditions, or events to the canvas by dragging them from the panel on the left.
3. For each component, click the **Edit Event** button.
 - a. If no further configuration is required, the left end and border of the component are the same color as the corresponding item in the component list.
 - b. If further configuration is required, the left end and border of the component are shaded gray. You will not be able to publish the journey if any components are in this state.

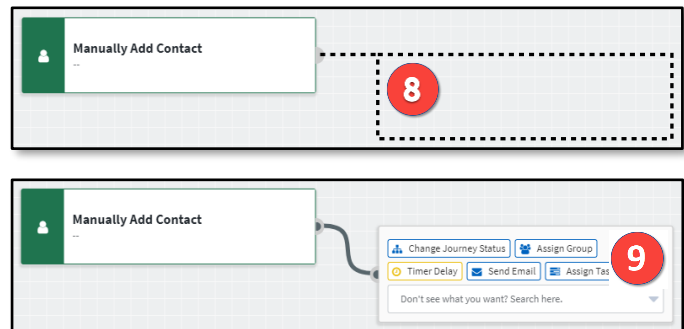






4. Though not required, it is a good idea to provide a name and description for each component. This information is displayed in the component's box on the canvas to help you and other users of the journey understand its purpose.
5. Complete any remaining configuration.
 - o If you do not provide a description, the component will display a summary of these settings instead.
6. Click the **Save Event Settings** button.

7. Add and remove connections as desired between items.
 - a. To create a connection such that Item A leads sequentially to Item B, click the output area of Item A then click the input area of Item B.
 - b. To remove an existing connection between two items:
 - i. Hover the mouse pointer over the connection line; a Delete button appears.
 - ii. Click the **Delete** button; the connection is removed.
 - c. If you delete a component from the canvas, any connections to or from it are also deleted.


8. You can also add components via the suggestion box. Click the output area of a component and move the mouse pointer to an empty area of the canvas. When a dashed connection and box are shown, click to place the suggestion box.
9. Click the button for a suggested component or select any available component from the drop-down list. Either way, the new component is created and automatically connected to the previous component.



Tips for Creating Workflows

- When organizing a journey, it may be helpful to think in terms of a When → If → Then progression. For example: *When* a new contact is created, *If* it came from a particular source, *Then* add it to a particular group.
- Save your work often. If you try to navigate away from the page without saving, you will be prompted to go back and save or lose your work since the last save.
- You can increase the visible area of the canvas by collapsing the side panels and by zooming out.
 - o Collapse the main navigation menu by clicking the **X** icon  in the page header. (Expand it again by clicking the hamburger icon ,.)



- Collapse the panel on the left side of the journey editor by clicking the **X** icon  or the icon for the currently selected tab. (Expand it again by clicking any tab icon.)
- Zoom in and out on the canvas by rolling the scroll wheel on your mouse.
- When including a Send Email action in a journey, add a Contact Value condition before it to check whether the contact record includes an email address.
 - If there is an address, go ahead and send the email.
 - If there is no address, create a task to get that information before continuing.
- Similarly, you may want a conditional step to check whether the contact has silenced communication.
- After a Timer Delay event, consider adding a conditional step to check whether the contact has data where you would expect to see it if the contact has done what you expected. For example:
 - Check whether a pre-approval has been issued.
 - If it has, set a new journey status and continue.
 - If not, create a task to investigate this before continuing.
- Set a journey status at the beginning of each journey and at transition points to ensure each contact is tracked appropriately along the journey.
 - Set a journey status before each endpoint to determine success/failure metrics.
- In the workflow, chain steps sequentially, rather than having several steps branch from a single previous step. When multiple steps flow from the same point, the system will attempt to process them simultaneously, which may not provide the behavior you expect and lead to slower overall processing times.
 - Exceptions: The Split Test and Task Outcome events are expected to have multiple components branching from them. A contact will be assigned to only 1 of the available branches.
 - Similarly, conditions and the Email Status event are expected to have separate branches leading from each output point. A contact will be assigned to only 1 of these branches.
- When several actions are chained in a sequence, insert a Time Delay event about every 3–5 steps. The delay can be a token amount as little as 1 minute. This enables more efficient processing.
- At the end of the workflow, include a Remove From Journey action. This ensures that the Journey Ended notification is recorded in the Activity Stream with an accurate timestamp.
 - If the journey includes multiple workflows, this will remove the contact from all workflows in the journey, so include this component only if you want to remove the contact from all parts of the journey.

Publishing a Journey

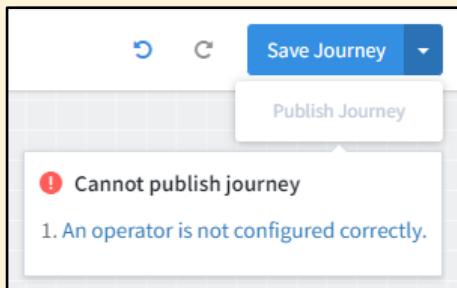
A journey must be published before it can be used. Once you are satisfied with your journey's workflow and configuration:

1. Click the **Save Journey** button in the upper-right corner of the page to ensure all your work is retained.
2. Hover the mouse pointer over the drop-down arrow next to the Save Journey button and select the **Publish Journey** option.



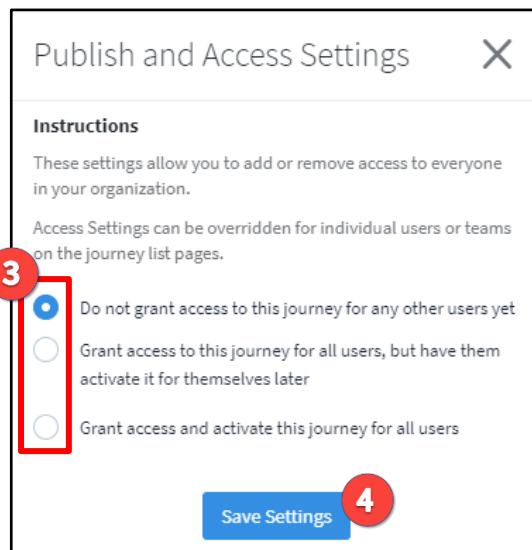
**Note**

If any components on the canvas do not have the required basic configuration, you will see the following error, and you will not be able to publish the journey until all configuration is complete.

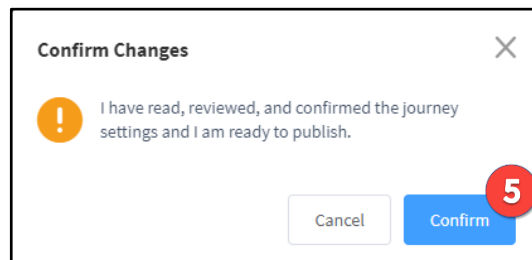


You can click this message to open the settings panel for a component whose configuration is incomplete.

3. In the Publish and Access Settings panel, select an option depending on how you want the journey to be distributed:
 - a. **Do not grant access to this journey for any other users yet** – This will not publish the journey for any users. You will need to use the User Settings and Team Settings to determine which users will have access.
 - b. **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.
 - c. **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.
4. Click the **Save Settings** button.



5. Click the **Confirm** button in the confirmation box.



If you selected the first option in step 3 above, you still need to determine which users will have access.

1. Select **Journeys** in the navigation menu.
2. Locate the journey in the list and select either **Actions → User Settings** or **Actions → Team Settings**.
3. On the User Settings or Team Settings page:
 - a. Select the users or teams to whom you want to grant access for this journey. You can include yourself.



- b. Select the appropriate options for them.
- c. Submit the changes.

Users with access to the published journey can find it by navigating to their journey list page. From this page, any user can view all the journeys that they have published or have had shared with them by another user.

From the journey list page, you can make changes to a published journey that you created by selecting the following options from the Actions menu:

1. **Edit** – This takes you directly back into the editing mode for the journey.
 - a. This should be used sparingly; modifying a journey after it has been published is not recommended, as it could interfere with the progress of contacts active in its workflow.
 - b. Each component shows a number at its upper-right corner representing the number of contacts who are currently in the journey and who have passed that step. When a contact reaches an endpoint, they are no longer counted at any step.
 - c. Click the number on any component to expand a panel at the bottom of the page, which shows your contact list, filtered to show only those counted by the number you clicked. You can collapse this panel by clicking the **X** above the upper-right corner of the panel.
2. **Deactivate For Myself** – After you click the Yes button in the confirmation box, this removes the selected journey from your active journeys and changes the Active label to Inactive. These are no longer available to be started for any contacts.
 - a. This should be done with care; unpublishing a journey suspends the progress of any contacts in its workflow. Subsequent steps will not be completed.
 - b. This option may not be available for journeys shared with you, depending on the settings selected when the journey was published.
 - c. You may not be able to republish an inactive journey, depending on its settings and whether it was shared.
3. **Delete Journey** – After you click the Yes button in the confirmation box, this removes the selected journey from your journey list. It cannot be recovered.

Note

You can only perform these actions on 1 journey at a time.

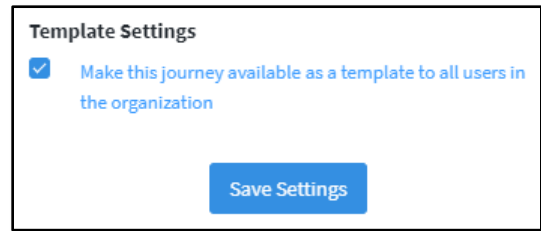
Saving and Using Templates

When multiple people in an organization should use similar (but not necessarily identical) processes, an administrator can create a journey to share with end users as a template. The template can be designed to be complete and ready to use as-is or instead as a foundation for individual users to build on. Each user can then access this template and customize it to fit their individual needs.

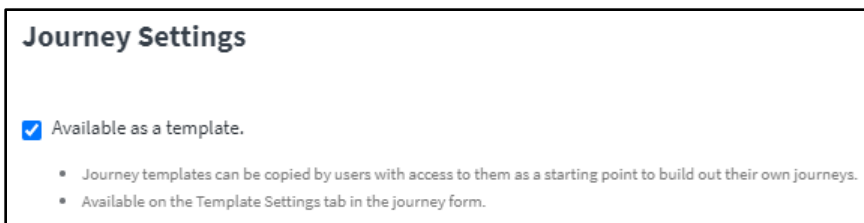


Saving a Journey as a Template

You can publish your journey as a template either for everyone in your organization or for selected users or teams, just as you would when publishing it otherwise. If you are publishing for everyone, you can simply check the box under **Template Settings** in the Publish and Access Settings panel. (This option is only available if you select 1 of the 2 options that grants access.)



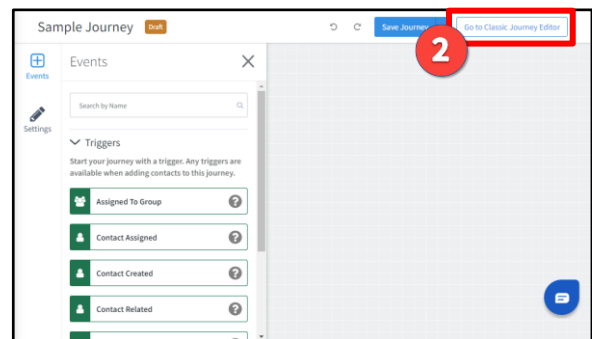
This would mean you are also publishing the journey in its own right, not just as a template. If you only want to make it a template, use the steps for publishing for selected users or teams above. On either the User Settings page or Team Settings page, select the option **Available as a template.** in the Journey Settings section (while leaving the remaining options unselected). Note that you could use this method to make the template available to everyone in your organization by simply selecting all the users and applying this setting.



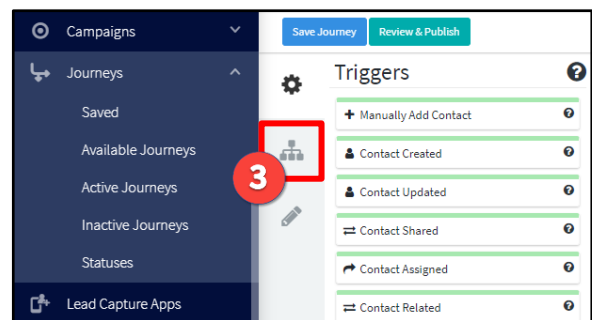
Using a Saved Template to Build a New Journey

A user who has been granted access to a template can use it to build a new journey of their own, using the template setup as a starting point.

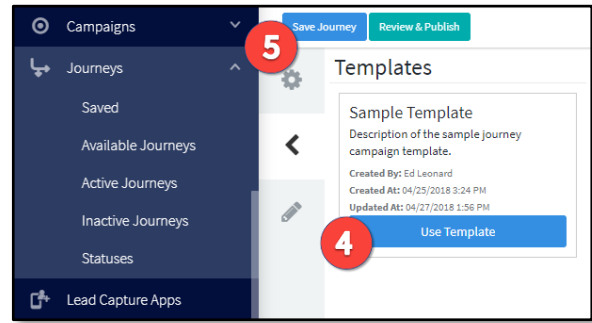
1. Create a new blank journey as described above.
2. Click the **Go to Classic Journey Editor** button in the upper-right corner of the page.



3. Click the **Templates** tab.



4. Locate the desired template and click the corresponding **Use Template** button.
5. Click the **Save Journey** button at the top of the page.



Any components and connections from the template journey are placed on the canvas. The saved settings for the imported components are also included. The current journey now exactly reflects the state of the one that generated the template, except the Goal Settings on the Settings tab, which are not imported with the template.

Note

You can edit the journey in the classic editor or return to the journey list page, where you can open it as usual and continue working in the current version of the journey editor.

Once you have imported the template, your new journey is independent of the template source. Changes made to the journey that created the template do *not* cascade down into any journeys created from earlier versions of the template.

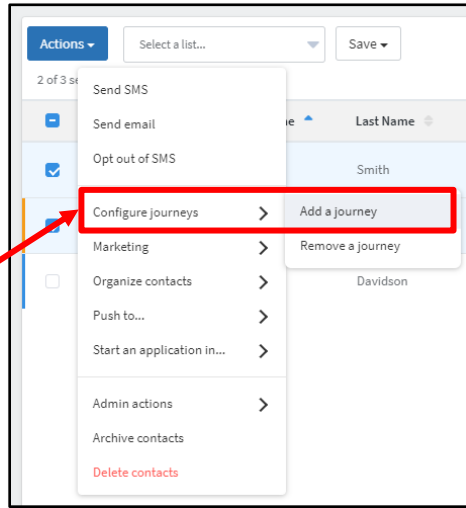
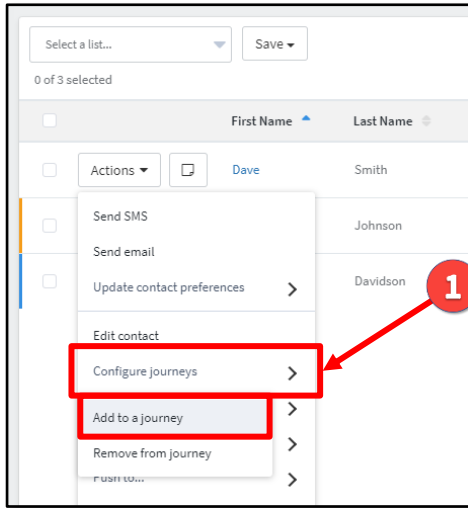
Tip

Import the template before doing other setup on the canvas. When you import a template, anything previously placed on the canvas will be erased and replaced by the template contents. You will not see a warning when this occurs.

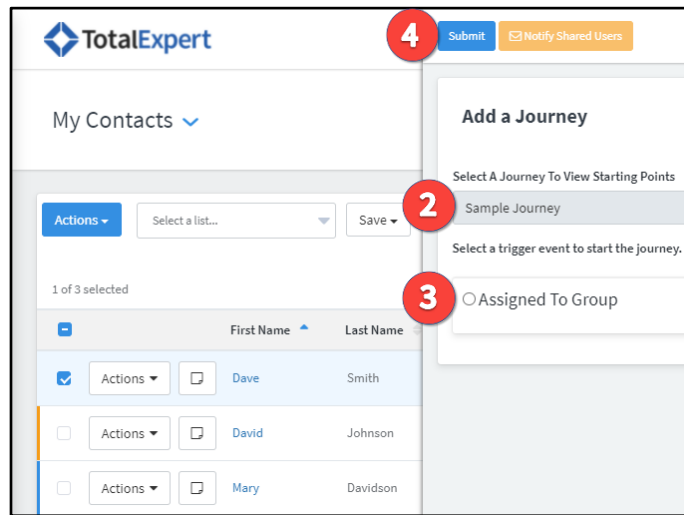
Manually Sending a Contact on a Journey

Many triggers are designed to begin the journey automatically when something occurs. However, you can start any journey manually for one or more specified contacts.

1. Navigate to **Leads & Contacts** → **Contacts**. Then either:
 - a. Click the **Actions** button for a single contact and select **Configure journeys** → **Add to a journey** from the drop-down list.
 - b. Check the boxes for 1 or more contacts, then click the Actions button that appears at the top of the page and select **Configure journeys** → **Add a journey** from the drop-down list.

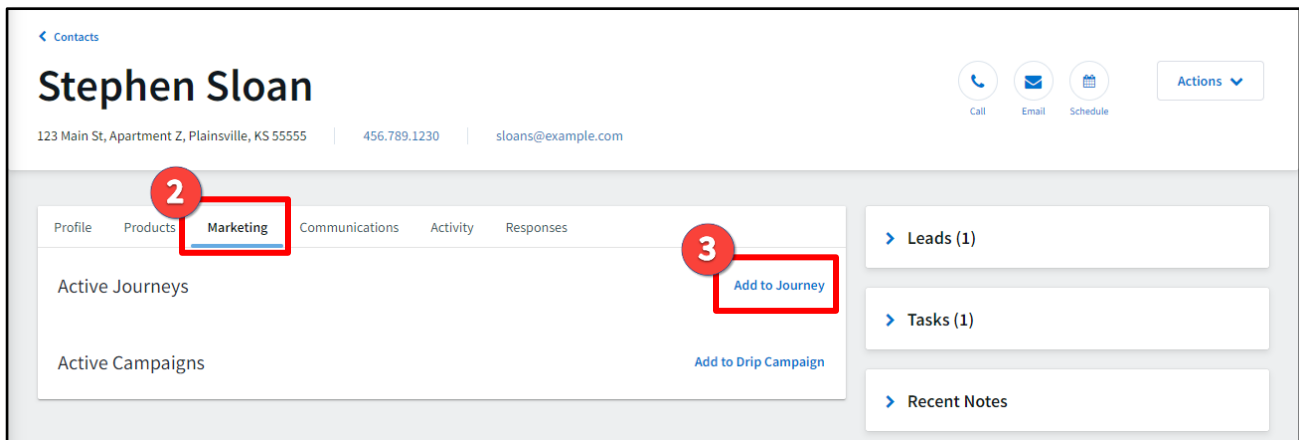


2. In either case, select the desired journey from the drop-down list in the slide-out panel.
3. Select the applicable trigger.
4. Click the **Submit** button.



Alternatively, from the contact list:

1. Click the name of a contact.
2. On the contact's details page, click the **Marketing** tab.
3. In the Active Journeys section, click the **Add to Journey** button.





4. Select the desired journey from the drop-down list in the Add Contact to Journey box.
5. Select the applicable trigger.
6. Click the **Submit** button.

Add Contact to Journey

Journey

Sample Journey

Select a trigger event to start the journey

Assigned To Group

Cancel Submit

When a contact is active in a journey, the Active Journeys section of the contact's details page lists the name and description of that journey. Also listed are:

- The date and time the contact was added to the journey
- The user the journey is running on behalf of
- The date and time when a trigger in the journey was most recently activated for that contact
 -
- Options to:
 - Stop the journey for that contact (if the current user was allowed this when the journey was published)
 - Add a co-marketing partner to any relevant communication sent as part of the journey
- The next pending event in the workflow with:
 - Its creation and scheduled times
 - Options to manually trigger or cancel the next pending event (if the current user was allowed this when the journey was published)

Once a journey starts, the remaining steps progress automatically (unless they are triggered manually).

Once a journey ends, the journey is no longer shown in the Active Journeys section. The activity related to the journey is recorded in the Activity tab.