Automation for End Users

Table of Contents

Introduction

Automation tools in Total Expert (TE) allow you to take advantage of the huge amount of data you already have about the people you do business with by delivering relevant marketing messaging to the right people at the right times. With careful setup, these tools can detect important additions or changes to your contacts and deliver them personalized communication based on this new information, allowing you to respond quickly and cultivate relationships while saving time for other tasks.

TE's integrated system of automation, communication, and customer relationship tools ensures that information flows smoothly and that reporting on results is fully linked with contact information, allowing you to analyze and improve your processes.

Different types of automated messaging styles are available depending on the scope and flexibility called for.

Note
Each type of automation is controlled by permissions in TE. If you do not see a feature you expect, contact your system administrator.

Commonly Used Terms

Name	Description
auto campaign	A series of emails and/or print marketing pieces delivered to a contact relating to a connected series of events, such as loan status milestones or recurring birthday messages. Created by an administrator and manually assigned to users in their organization. Contacts are added automatically based on group assignment determined by each user with access.
campaign (sometimes called *multi-channel campaign*)	A series of emails delivered at predetermined times to deliver a consistent message to a wide range of contacts at once. Created by an administrator and automatically assigned to users in their organization based on inclusion and exclusion user rules. Contacts are added automatically for each user with access based on inclusion and exclusion audience rules applied to their entire contact list.
drip campaign	A basic series of emails delivered to a contact at specified intervals or on specific days. Created by an end user or by an administrator and manually assigned to users in their organization. Contacts are added manually as individuals or automatically based on group assignment.

Name	Description
journey	A series of dynamically linked conditional triggers and actions, which can include sending email, sending SMS messages, creating tasks in TE, and triggering other journeys, among other things. Created by an administrator and assigned to users in their organization. Contacts are added dynamically by triggers that detect changes in the system that match their definition. Contacts progress through defined actions and delays and can be removed or rerouted at appropriate stages according to incoming and changing information.

Using Journeys

Overview

A journey in Total Expert represents a workflow encompassing all the tasks, communications, and milestones related to a contact covering all aspects of a particular stage of your relationship with them, such as end-to-end loan support from application to closing or simply nurturing a lead. It automatically detects specified trigger conditions and then guides applicable contacts, products, or loans through logical paths of well-defined steps toward a desired goal with the purpose of automating the workflow you already use to interact with your contacts.

A journey can send an email or a text message; modify a contact's group assignments; share, assign, or push a contact; assign a task related to the contact; and more. These actions run under closely specified conditions, so you know you are only communicating with appropriate people at appropriate times.

Journeys 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).

A journey is typically created by an administrator and shared with relevant users in their organization. Because of this, limited actions are available to the end users. In fact, when a journey is published and made active, no intervention is required; when a contact or loan record experiences a change that matches a trigger in an active journey, that contact or loan is automatically added to the journey and begins to progress through it.

Note

A primary use of journeys is to send communication to contacts.

• All communication sent by journeys respects Silenced and Opted Out settings.

• Communication that would be sent by inactive users in your organizations is suppressed.

• SMS messages that are triggered between 7pm CT and 10am the following morning are held until 10am. Messages triggered between 10am and 7pm are sent immediately.

Journey-Specific Terms

A *journey* is a workflow that consists of a series of steps or *components*. 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 or loan, that contact or loan 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 or assigning a contact.
- A *condition* tells the system to check whether a specified parameter matches a specified value or range. The workflow splits at a condition, and the contact or loan 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 an administrator *publishes* a journey, different things may happen, depending on the options selected.

- The journey may be *active*, meaning that it will immediately begin detecting when something matches its trigger and run for each end user granted access.
  - The active journeys in your account are listed on the Active Journeys page (**Journeys → Active Journeys**).
- The journey may be *available*, meaning that it is ready to use, but it is not active. Each end user granted access to it has the option to make it active for their own use (opt in).
  - The available journeys in your account are listed on the Available Journeys page (**Journeys → Available Journeys**).

Depending on the settings, you may be able to *unpublish* (opt out from) a journey, which removes it from the active state. It is then archived, but not deleted. You cannot unpublish a journey unless it is already active. Once it is unpublished, you can re-publish it later or simply leave it out of use.

- The unpublished journeys in your account are listed on the Inactive Journeys page (**Journeys → Inactive Journeys**).

A *journey status* is a text label that can be used to track a given contact or loan as they step through the workflow. The status may change several times throughout the course of a single journey.

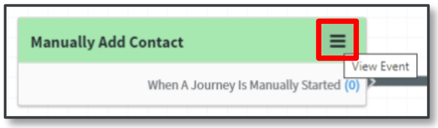
Published Journeys

Available

Navigate to **Journeys → Available Journeys**. This page contains a list of all the journeys that have been published and made available to you but are not active. The name and description provided by the journey's creator are listed, along with the date and time of its creation and last update. Conversion Ratio and Failure Ratio statistics are provided, determined by journey statuses specified as part of the journey's settings. Because the journey could not have run yet for any of your contacts, these ratios reflect the journey's performance for other users who have already made it active.

Check the box on the left side to activate the following action buttons:

- **Publish Journey** – Click this button and the **Ok** button in the confirmation box to switch the journey to the active state. Once this is done, the journey immediately begins checking activity against its trigger conditions. The journey is removed from the list on this page and moved to the Active Journeys page. An active journey cannot be returned to the available state.
- **View Journey** – Click this button to see a graphic representation of the journey's components and sequential links. Click the **View Event** (hamburger) button at the right end of any component to view its settings in a slide-out panel. This allows you to inspect, but not modify, the entire setup of the journey so you can determine whether or not you want to publish it.



Active

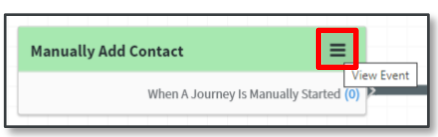
Navigate to **Journeys → Active Journeys**. This page contains a list of all the journeys that have been published and made active for you, including those made active automatically and those you activated from the Available Journeys page. The number of Conversions and Failures to date are listed for each journey as well as their respective ratios. These metrics are determined using only your own contacts, not those of other users with access to this journey.

Check the box on the left side to activate the following action buttons:

- **Unpublish Journey** – Click this button and the **Ok** button in the confirmation box to unpublish the journey. Once this is done, the journey immediately stops checking activity against its trigger conditions and stops the progress of any contacts on the journey. The journey is removed from the list on this page and moved to the Inactive Journeys page. An inactive journey can be returned to the active state later.

Note
Depending on the journey's settings, you may not see the option to unpublish an active journey.

- **View Journey** – Click this button to see a graphic representation of the journey's components and sequential links. Click the **View Event** (hamburger) button at the right end of any component to view its settings in a slide-out panel. This allows you to inspect, but not modify, the entire setup of the journey so you can determine whether or not you want to unpublish it. In addition, a number in parentheses is shown on each component, indicating the number of your contacts who have passed through that step and are still on the journey somewhere. Contacts who have been removed from the journey are no longer counted on any step. Click this number to open a panel at the bottom of the screen showing your contact list filtered to show only those who are counted.

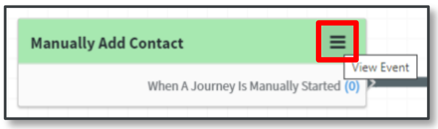


Inactive

Navigate to **Journeys → Inactive Journeys**. This page contains a list of all the journeys that you have access to and have been unpublished. The number of Conversions and Failures while the journey was active are listed for each journey as well as their respective ratios. These metrics are determined using only your own contacts, not those of other users with access to this journey.

Check the box on the left side to activate the following action buttons:

- **View Journey** – Click this button to see a graphic representation of the journey's components and sequential links. Click the **View Event** (hamburger) button at the right end of any component to view its settings in a slide-out panel. This allows you to inspect, but not modify, the entire setup of the journey so you can determine whether or not you want to republish it. In addition, a number in parentheses is shown on each component, indicating the number of your contacts who had passed through that step and were still on the journey somewhere when the journey was unpublished. Contacts who have been removed from the journey are no longer counted on any step. Click this number to open a panel at the bottom of the screen showing your contact list filtered to show only those who are counted.



- **Publish Journey** – Click this button and the **Ok** button in the confirmation box to republish the journey. Once this is done, the journey immediately starts checking activity against its trigger conditions again and resumes the progress of any contacts on the journey. The journey is removed from the list on this page and moved to the Active Journeys page.

Note
Depending on the journey's settings, you may not see the option to publish an inactive journey.

Statuses

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

Navigate to **Journeys → Statuses** to see a list of statuses that you have created or that have been shared with you. Each item includes a count of the number of contacts that are currently categorized by this journey status in some journey. When a contact or loan 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 or who have a loan with this status.

Manual Journey Actions

You have some limited options to interact with active journeys to influence their progress.

Note
These options depend on settings selected for each journey. They may not be available for every journey.

Triggering a Journey

You can manually add a contact to a 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, locate the Journeys section on the right side.
4. Click the **Add Journey** button.
5. In the Add a Journey box, select the name of the journey you want to add the contact to from the **Select A Journey To View Starting Points** 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 **Add Journey** button to confirm your selection and start the contact on the journey.

When the contact details page refreshes, the Journeys section updates to show the selected journey and the contact’s current progress. The Recent Activity section 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 → 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

You can also trigger the next pending step for a contact already on a journey. This means that if you want to intervene and cause a contact to skip to the next step in the journey, you 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, you would be able skip the delay for the contact to send them the next message 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, locate the Journeys section on the right side.
4. 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 (if any) provided when the component was added to the journey
    - 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 – see Warning below
    - 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.

Specifying a Status or a Co-Marketer

For a contact on a journey, the Journeys section of their details page also includes two drop-down lists:

- Journey Status
    - This drop-down list is only available if the current journey includes at least one Change Journey Status action. Furthermore, you can only select from journey statuses specified in Change Journey Status actions in the current journey—you cannot select a status that is not used anywhere in the

journey. For example, if you have defined statuses A, B, and C on the Journey Statuses page, but only make use of A and B in a given journey, you will not be able to manually set a contact on that journey to status C.
    - This sets the journey status to the value you select for the current contact, regardless of their progress on the journey. It does not jump them to a different part of the journey where that status would automatically be applied.

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.

- Co-Marketer
    - This drop-down list allows you to select from your co-marketing partners. The user you select will 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.

Removing a Contact from a Journey

You can remove a contact from the journey. This means that if you want to prevent a contact from having any further involvement with the journey, you 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, locate the Journeys section on the right side.
4. The contact may be on more than one journey. All journeys that the contact is on are listed. Locate the journey you want to remove the contact from.
5. Click the corresponding **Stop Journey** 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.

Journeys and 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 selections made by the user who published the journey.

- 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.

Using Campaigns

Campaign Overview

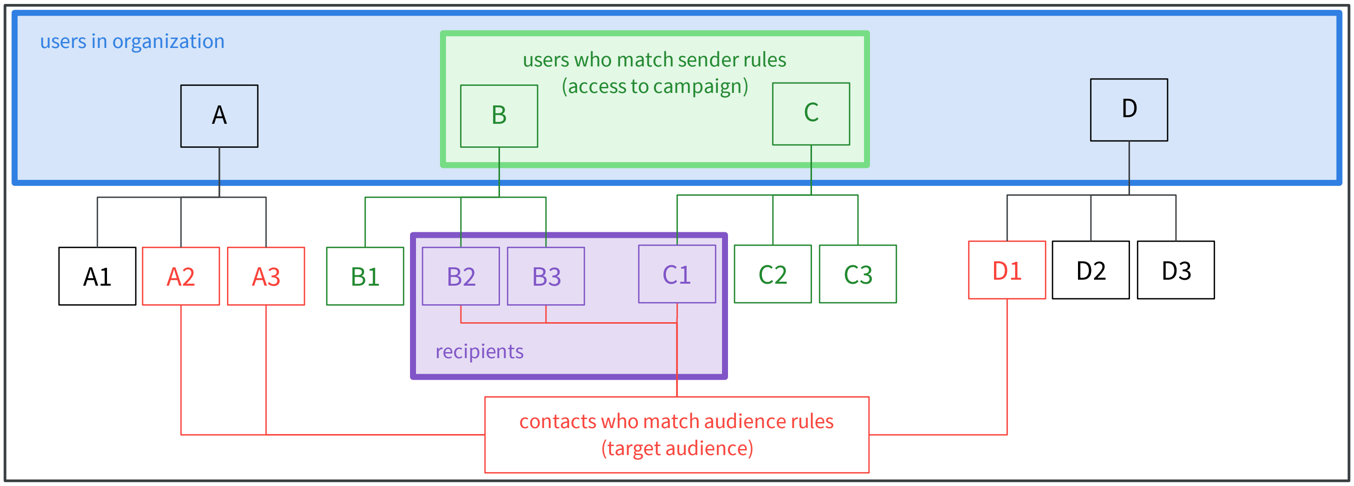
A campaign allows your organization to send a sequence of selected materials at pre-determined times to contacts belonging to various users across the organization. This allows one user, such as a marketing administrator, to broadcast a unified message to a desired segment of your organization's overall set of contacts.

The contacts who receive the materials from a campaign are determined by a combination of sender rules and audience rules:

- Sender rules determine which users in your organization have access to the campaign.
- Audience rules define which contacts are the target audience of the campaign.
- Only contacts who are both members of the target audience *and* belong to users with access to the campaign will receive the campaign materials. These contacts are called recipients.

Consider a simple organization with 4 users: A, B, C, and D, each with 3 contacts as shown in the diagram below. Suppose the sender rules only give access to a campaign to users B and C.

- None of user A's or user D's contacts are recipients, even though some of them match the audience rules.
- Some of user B's and user C's contacts are not recipients, because they do not match the audience rules.



Materials are automatically sent to each recipient on behalf of the user who owns the contact. In the example above, contacts B2 and B3 will see the materials as coming from user B, while contact C1 will see them coming from user C. However, no manual action is needed from either user B or user C; the campaign sends the materials automatically on their behalf.

Campaigns can be created as either *mandatory* or *opt out* types:

- *Mandatory* campaigns send all materials to all identified recipients. Users identified by the sender rules in the campaign cannot stop it.
- *Opt out* campaigns give each user identified by the sender rules the opportunity to individually opt out of the campaign. If a sender opts out, the campaign is stopped for all their contacts who would be recipients and cannot be restarted. Other senders' recipients are not affected.

Campaign List

Navigate to **Campaigns → Campaign Builder** to see a list of tiles representing the campaigns you have access to.

For users who do not have permission to create or edit campaigns, each tile on this list includes:

- The name and description of the campaign. Click the name to view metrics and definition of a campaign that has been started.
- For campaigns that have been started, the start and end dates of the campaign.
- The date the campaign was created.
- The current status of the campaign (see Campaign Statuses below).
- For opt out campaigns that were created by another user and have been started, an **Ø Opt out** button. This is not available for mandatory campaigns created by another user.

Campaign Definition

Click the name of a campaign created and started by another user to view some details about it. There are 3 tabs available: Overview, Audience, and Content; the Overview tab opens by default.

Overview Tab

For a campaign that has been started, the Overview tab displays various performance statistics that should help you determine how the campaign is engaging the audience. A summary of the materials scheduled in the campaign including metrics relating to each item is also included.

The user who created the campaign sees statistics for all recipients of the campaign. Other users with access to the campaign see statistics only for the recipients from their own contact list.

Audience Tab

The communication from the campaign is sent to a subset of your users' contacts. The contacts targeted by the campaign are determined by the audience rules.

There are 2 types of audience rules: inclusion and exclusion.

- Inclusion rules determine which contacts should be targeted to receive the materials sent by the campaign. A contact is included only if they match *all* of the inclusion rules.
- Exclusion rules omit contacts from the targeted audience, even if an excluded contact would otherwise be targeted by an inclusion rule. A contact is excluded if they match *any* of the exclusion rules.

When a campaign is running, stopped, or completed, the rules are shown as read-only; the options to add, edit, or delete rules are disabled.

The Recipients count shown on the right side of the page displays a count of the number of your contacts who match the full set of audience rules. This does not include contacts of other users in your organization who may also receive materials from this campaign.

Note
The Recipients count identifies the number of contacts who matched the rules when the campaign was started. The recipient list is locked in at that time and is not updated, even if your contact list changes thereafter.

Content Tab

The content of the campaign is summarized as a list of the items to be sent. Each item indicates the date and time it was or will be sent. Click the **Preview** button to review the selected email in a pop-up window.

Campaign Statuses

A status is displayed in the lower-right corner of each tile on the campaign list at Campaigns → Campaign Builder. The status is also shown in the upper-right corner of the header of the campaign builder, so it is visible no matter which tab you are viewing. A campaign can be in any of 5 statuses:

- Draft – The campaign has been created but cannot be started because it is not fully defined.
    - A user without access to create or edit campaigns will not see campaigns in this status.
- Ready – The campaign has enough information defined to allow it to run, but it has not been started yet.
    - A user without access to create or edit campaigns will not see campaigns in this status.
- Running – The campaign has been started and will send each item listed on the Content tab at the scheduled time.

- Once a campaign has been started, it cannot be modified.
- When a campaign is started, the list of recipients is frozen. If you add new contacts after the campaign is started, those contacts will not be added to the campaign, even if they satisfy its audience rules.

- Completed – The campaign has sent all the items on the Content tab and has concluded.
- Stopped – The campaign was started but was ended prior to sending all scheduled materials.
    - A user with access to the campaign sees this status when the campaign has been stopped either because the creator stopped it for everyone or because that user opted themselves out.

Opting Out

When a campaign is started and you are included as a sender, that campaign is listed on the page at Campaigns → Campaign Builder. For mandatory campaigns, you can review the metrics and setup but cannot stop any of its materials from being sent on your behalf.

However, opt out campaigns allow you to stop the progress for your contacts. To do so, click the **Ø Opt out** button on either the campaign list tile or in the campaign builder. When you click the **Opt out** button in the confirmation box, progress is stopped for all your contacts, the status changes to Stopped, and you cannot opt back in. Contacts of other senders are unaffected.

Note
If a recipient chooses to unsubscribe from email sent by the Total Expert platform, they will be removed from any campaigns that count them as a recipient.

Using Auto Campaigns

As an end user, if an administrator in your organization makes an auto campaign available to you, that campaign is not activated for you by default. You have the option to begin using it or stop using it at any time. This gives you the flexibility to ensure you are only sending out the right information to the right contacts at the right times.

Auto campaign events only trigger for contacts who belong to groups that you add to the campaign. This gives you further control over the audience of the campaign materials by ensuring only relevant contacts are targeted.

Opting In

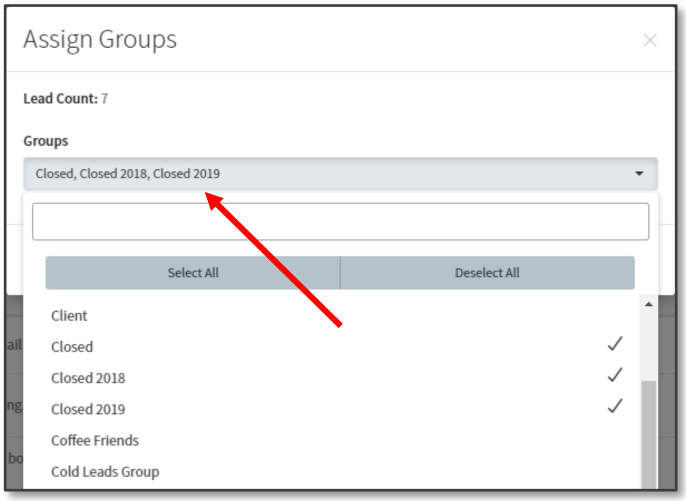
When an administrator creates an auto campaign and makes it available for you to use, you can make it active by adding one or more contact groups to the campaign.

Tip
For a new campaign, create a new contact group whose purpose is solely to be associated with the campaign. Then add only relevant contacts to that group. Contacts receive campaign materials whether they are added to the group before or after the group is added to the campaign.

To add a group to a campaign (and thus make it active for any contacts who already belong to the group):

1. Navigate to **Campaigns → Auto Campaigns**.
    a. The grid on this page lists any campaigns (active or inactive) that have been made available to you.

2. For the new campaign, select **Actions → Edit Group Assignment**.
3. Click the **Groups** drop-down menu and select the group whose members should receive the materials specified by the campaign. You can add more than one group if you do not have a dedicated group.



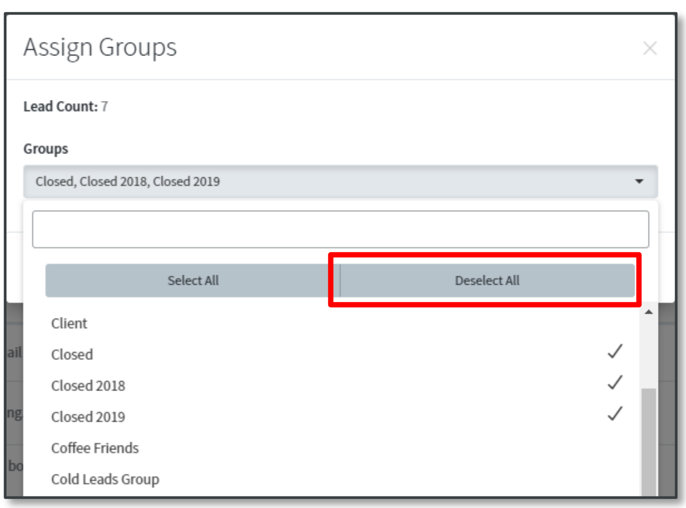
4. Click the **Submit** button.

The Status column in the grid is checked for any campaign that has at least one assigned group with at least one contact in it. That is, Group Count and Contact Count must both be nonzero for the campaign to be active.

Opting Out

You can stop using an auto campaign at any time by simply removing groups from the campaign.

1. Navigate to **Campaigns → Auto Campaigns**.
2. For relevant campaign, select **Actions → Edit Group Assignment**.
3. Click the **Groups** drop-down menu and click the **Deselect All** button. You can also remove individual groups by deselecting them from the list.



4. Click **Submit**.

The campaign is still shown in the list, but the Status column is unchecked. It will no longer trigger any actions.

To remove a single contact from a campaign, either remove them from the group associated with the campaign or use the Silence Communication feature on the contact details page.

Creating and Using Drip Campaigns

Any user with permission to use drip campaigns also has permission to create their own.

A drip campaign is the least complex type of campaign in TE. It consists only of emails which are scheduled to send on specified dates (for example, February 14th, July 4th, and December 25th) or at intervals following when a contact was added to the drip campaign (for example, on day 1, day 15, and day 30 after being added).

Because of the passive nature of drip campaigns, they are best reserved for basic messaging.

Note
A drip campaign continues to its conclusion for each recipient unless the recipient is manually removed from the campaign.

To create a drip campaign:

1. Navigate to **Campaigns → Drip Campaigns**.
2. Click the **+Create** button in the upper-left corner of the page. The Campaign Settings page opens.
3. Enter a unique name for the drip campaign in the **Campaign Name** field.
4. In the **Campaign Type** drop-down list, select either:
    a. **Incremental Days** – Select this option to send emails to each contact on days relative to when they joined the campaign.
    b. **Date Specific** – Select this option to send emails on specific MM/DD/YYYY dates.
5. (optional) Click the **Grant New Users Access** switch to toggle this option on (green) for this drip campaign.
    a. If this is on, new users added to your organization will have access to this drip campaign immediately.
    b. If this is off, you would have to grant each new user access to this drip campaign individually.
6. For each email you want to be sent during the drip campaign, do both of the following:
    a. Locate the name of the email template in the list at the bottom of the page and check the box on the left.

Tip
Use the Search box on the right side of the page to filter the list. Click the **View** button in the row of an email template to verify that it is the one you are looking for.

    b. Define when the email should be sent in the **On Day** column. The options depend on whether you selected Incremental Days or Date Specific as the Campaign Type.
        i. If you selected Incremental Days, enter a positive integer in the box, indicating how many days after a contact is added to a drip campaign that they should receive that email. For example, if you enter 1, that email will be sent the day after the contact is added. (Do not enter a 0; any message scheduled for day 0 will not be sent.)

ii. If you selected Date Specific, click in the box and select the exact date the email should be sent from the date selector.

7. When you have completed step 6 for each email to include, click the **Save Campaign** button in the upper-left corner of the page.

Granting Access

As the user who created the drip campaign, you automatically have access to use it. If you want other users in your organization to have access:

1. Navigate to **Campaigns → Drip Campaigns**.
2. Locate the campaign in the list and check the box on the left.
3. Click the **User Settings** button (person icon) at the top of the page. A page listing available users opens.
4. Check the box in the **Allow Access** column on the right for each user who should have access to the drip campaign.
5. Click the **Save Campaign** button at the top of the page.

Assigning Contacts

A user with access to a drip campaign can add a whole group of contacts to it at once or select individual contacts. A contact receives these emails only if they belong to a selected group or they are selected individually.

By Group

1. Navigate to **Campaigns → Drip Campaigns**.
2. Locate the campaign in the list and check the box on the left.
3. Click the **View Campaign** button (three lines icon) at the top of the page. A summary page opens.
4. Click the **Assign to Group** button at the top of the summary page. The Assign Groups box appears.
5. Check the boxes for any contact groups whose members should be added to the drip campaign.
6. (optional) In the **Co-Marketer** drop-down list, select a connected TE user whose information will be used to fill any co-marketer information placeholders in the email templates of this drip campaign. (If there are no such placeholders, this has no effect.)
7. Click the **Assign Groups** button.

Individually

1. Navigate to **Leads & Contacts → Contacts**.
2. Locate the contact(s) you want to add and check the box(es) on the left.
3. Select **Actions → Add an Email Campaign**. A slide-out panel opens on the right.
4. In the **Select an Email Campaign** drop-down list, select the name of the drip campaign you want to add these contacts to.
5. (optional) In the **Select a Co-Marketer** drop-down list, select a connected TE user whose information will be used to fill any co-marketer information placeholders in the email templates of this drip campaign. (If there are no such placeholders, this has no effect.)
6. Click the **Submit** button at the top of the panel.