

How to Set Up an AutoProgram

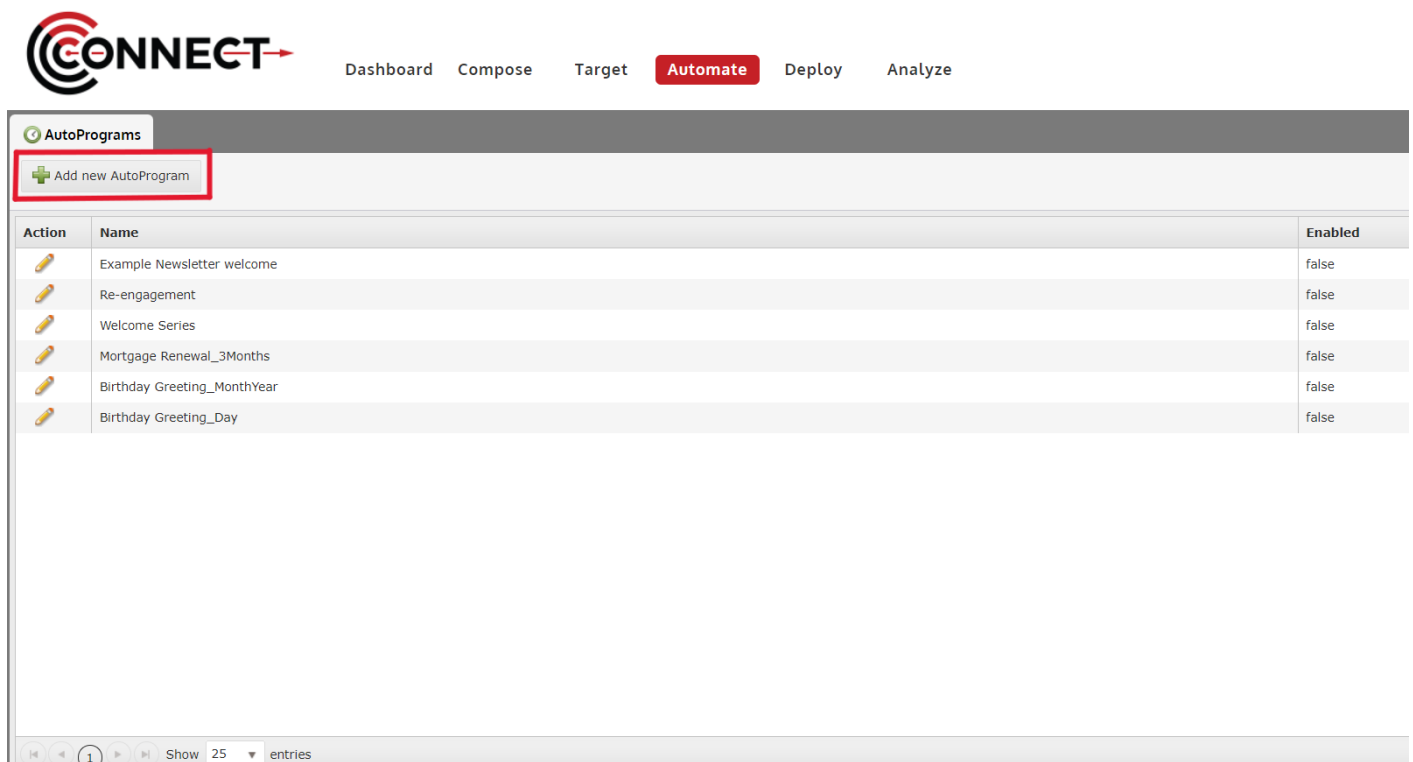
AutoPrograms allow you to set up a predetermined "stream" of messages for your records to complete.

In these programs, you choose a segment, so that the program knows who to target and a Subscription so that the program knows who to exclude based on their subscribe/unsubscribe status.







You can also tell this program how long to wait in between each message and if you would like the records to complete the program once or repeatedly go through the program.

Below are the instructions on how to set up an AutoProgram.

1. Click "Create new AutoProgram" on the Automate Tab



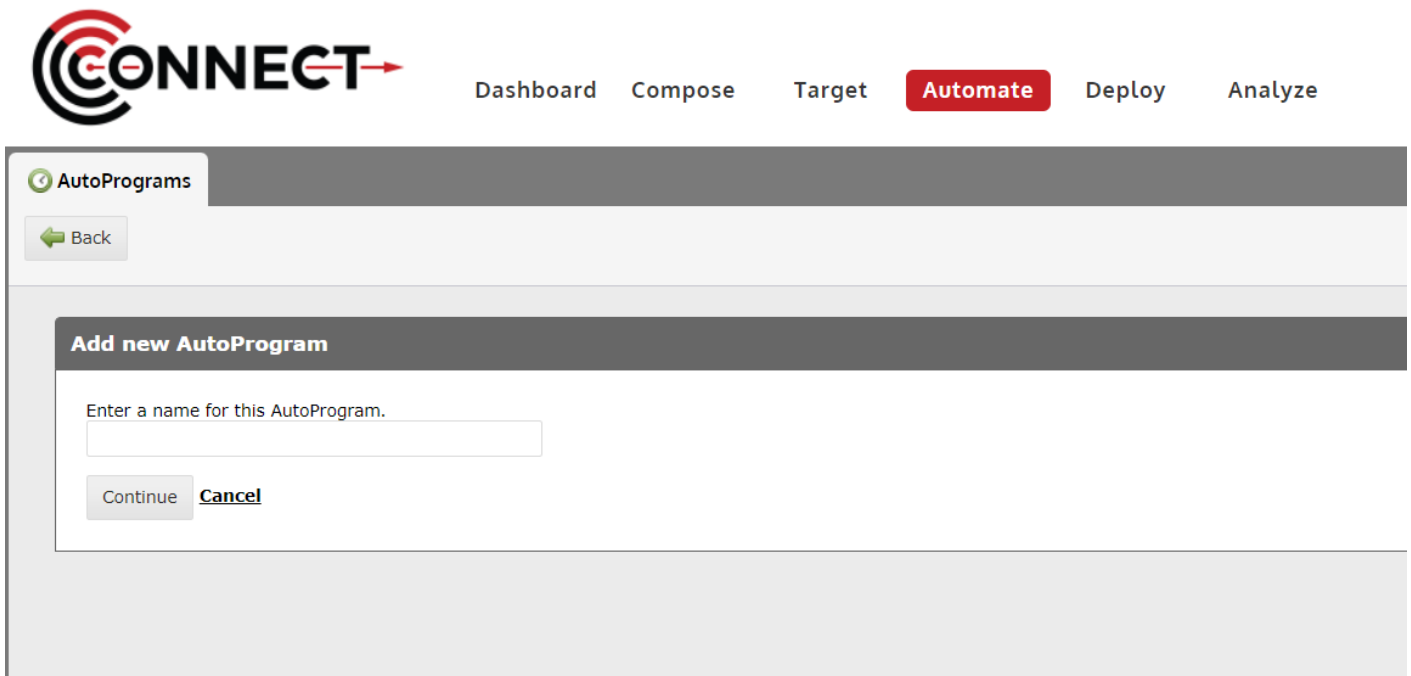
The screenshot shows the CONNECT dashboard with the Automate tab selected. The 'Add new AutoProgram' button is highlighted with a red box. Below the button is a table of existing AutoPrograms.

Action	Name	Enabled
	Example Newsletter welcome	false
	Re-engagement	false
	Welcome Series	false
	Mortgage Renewal_3Months	false
	Birthday Greeting_MonthYear	false
	Birthday Greeting_Day	false

At the bottom of the dashboard, there is a pagination bar showing '1' of 1 entries, with a 'Show 25 entries' dropdown menu.

1. Click Automate Tab
2. Click Add New AutoProgram

2. Type in the name for your AutoProgram and click Continue







The screenshot shows the CC-CONNECT web interface. At the top, there is a navigation bar with the CC-CONNECT logo on the left and several tabs: Dashboard, Compose, Target, Automate (highlighted in red), Deploy, and Analyze. Below the navigation bar, there is a section titled 'AutoPrograms' with a 'Back' button. The main content area is titled 'Add new AutoProgram' and contains a text input field with the placeholder text 'Enter a name for this AutoProgram.' Below the input field are two buttons: 'Continue' and 'Cancel'.

3. Click "Edit" next to the newly created AutoProgram



AutoPrograms

+ Add new AutoProgram

Action	Name	Enabled
	Example Newsletter welcome	false
	Re-engagement	false
	Welcome Series	false
	Mortgage Renewal_3Months	false
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	Birthday Greeting_Day	false

4. Select the Subscription you wish to send against



AutoPrograms

← Back

Save AutoProgram

Save & ReSync

Program name:

Program status ☐ Enabled ☒ Disabled

Program steps

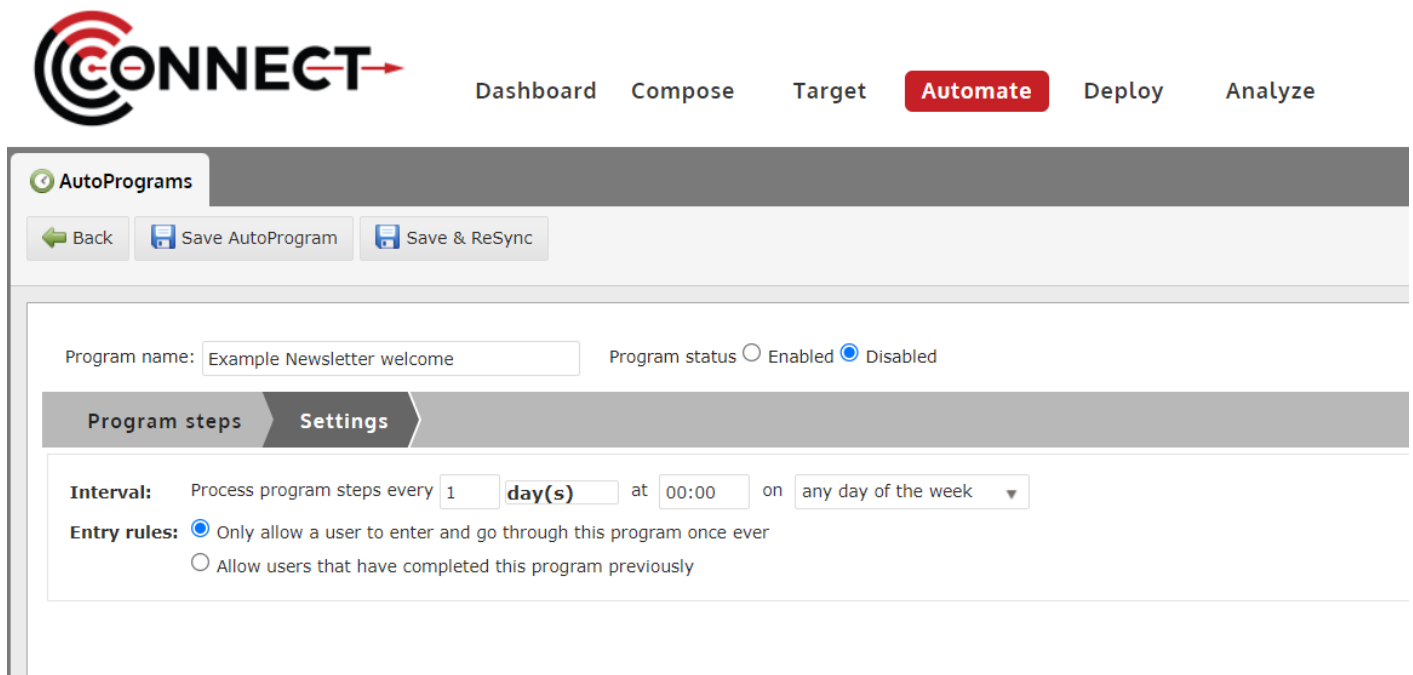
Settings

Subscription:

Target audience: People who

- **Alert:** DO NOT ENABLE YOUR AUTOPROGRAM UNTIL FINISHED. See the final step of this tutorial for details.
- **Note:** Any records that have Unsubscribed from the chosen subscription will not be included in the program.

5. Switch to the "Settings" tab, Set the Program Run Interval



The screenshot shows the CONNECT Automate interface. At the top, there's a navigation bar with links: Dashboard, Compose, Target, Automate (highlighted in red), Deploy, and Analyze. Below this is the 'AutoPrograms' section. It includes buttons for 'Back', 'Save AutoProgram', and 'Save & ReSync'. The main area shows the 'Program name' as 'Example Newsletter welcome' and 'Program status' as 'Disabled' (selected). Below this is a tabbed interface with 'Program steps' and 'Settings' (selected). The 'Settings' tab displays the 'Interval' as 'Process program steps every 1 day(s) at 00:00 on any day of the week'. Under 'Entry rules', the first option 'Only allow a user to enter and go through this program once ever' is selected.

This interval determines how often the AutoProgram will process the steps. In other words, it tells your AutoProgram how often you would like it to go through each step of the program and determine which records receive messages and which records are waiting.

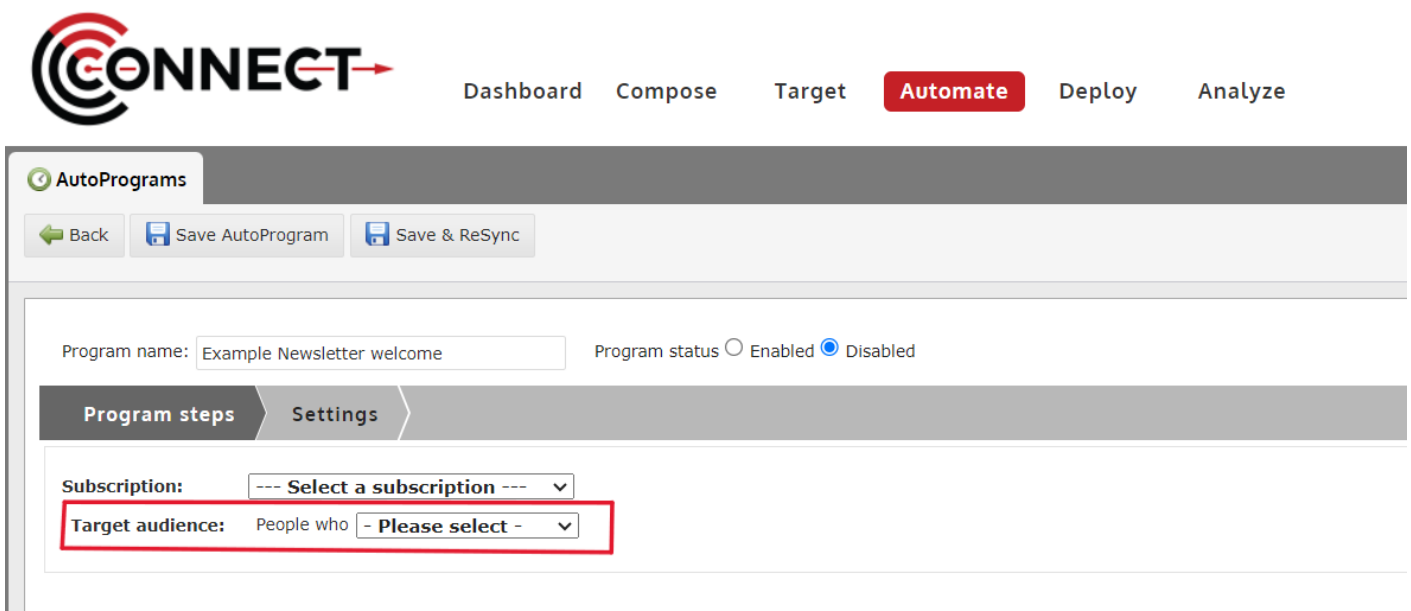
This is very important as it greatly effects your "wait periods" in the next steps of this tutorial.

Set if you would like records to go through the program once or repeatedly

- **Only allow a user to enter and go through this program once ever**
 - This specifies that you would like each record that enters the AutoProgram, to only go through the program once and only once.

- **Allow users that have completed this program previously**
 - This specifies that you are allowing each record that enters the AutoProgram, to repeat the program if they still fit the "Target Audience".

6. Select the Segment or List File you wish to use as your target for the AutoProgram



The screenshot shows the CONNECT dashboard with the 'Automate' tab selected. The 'AutoPrograms' section is active, displaying a form for creating or editing a program. The 'Program name' field contains 'Example Newsletter welcome'. The 'Program status' is set to 'Disabled'. The 'Program steps' tab is selected, and the 'Settings' sub-tab is active. The 'Subscription' dropdown is set to '--- Select a subscription ---'. The 'Target audience' dropdown is highlighted with a red box and contains the text 'People who - Please select -'.

- Go back, and Click **Program Steps**
- Select the Target Audience, **either it is in the file or in the segment**
- Click **Select a Source**

7. Click Add another action to insert the first action the program will perform

8. Select either "Send the email" or "Wait For" as your first action.

- **Send the email**

- This will send the selected Message to the selected Target audience, when the program runs.
- If you choose "Send the email" as your first step, any new records that become part of the Target Audience, will receive the selected message first.

- **Wait For**

- This will trigger a wait period. Generally, wait steps are used for in between messages, however, if you use it as your first step, you are indicating you would like the program to wait the indicated number of time when the program runs.
 - Therefore, if you set your program to run every 1 day(s) at 10:00AM, it will begin the indicated "wait period" when the program runs at 10:00AM.
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9. Click "Add another action" if you wish to continue to add additional steps to your AutoProgram

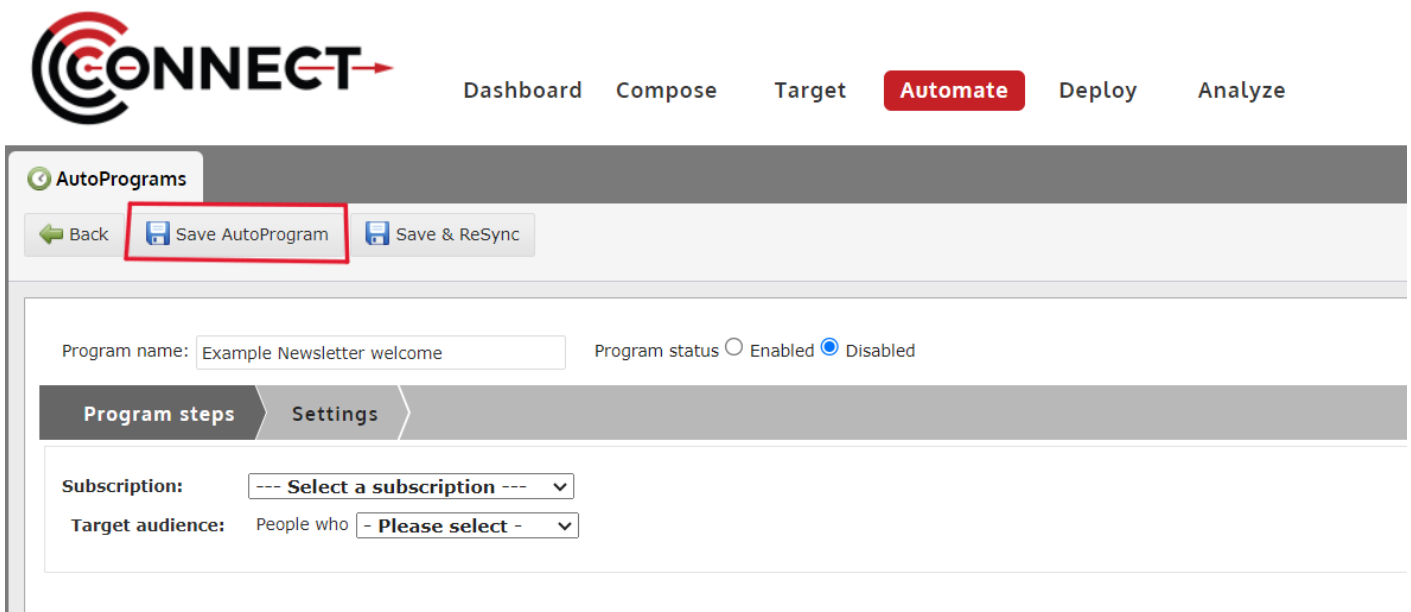
Note: If a wait period is placed after a message, the wait period begins as soon as the message is sent.

Example:

- The program is set up as "Send the email, Wait for 2 days, Send the email" and it is set to run every 1 day(s) at 10:00AM.
- Each record that enters the program will receive the first message immediately at 10:00AM when the program runs.

- This message also triggers the wait period after it. Then the next day, the program would run at 10:00AM again.
- However, since there is a wait period of 2 days, the program reads that the record that received the first message is in a state of "waiting".
- The 3rd time the program runs at 10:00AM, the wait period has been finished and the next email will be sent.

10. Enabling your AutoProgram, Click "Save AutoProgram" once finished



The screenshot shows the CONNECT interface. The top navigation bar includes the CONNECT logo and links to Dashboard, Compose, Target, Automate (highlighted in red), Deploy, and Analyze. Below the navigation bar, the 'AutoPrograms' section is active. It features a 'Back' button and two buttons: 'Save AutoProgram' (highlighted with a red box) and 'Save & ReSync'. The main content area shows the 'Program name' as 'Example Newsletter welcome' and the 'Program status' as 'Disabled' (selected with a radio button). Below this, there are tabs for 'Program steps' and 'Settings'. Under the 'Settings' tab, there are two dropdown menus: 'Subscription' with the text '--- Select a subscription ---' and 'Target audience' with the text 'People who - Please select -'.

Revision #3

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