

How to Set Up an AutoProgram

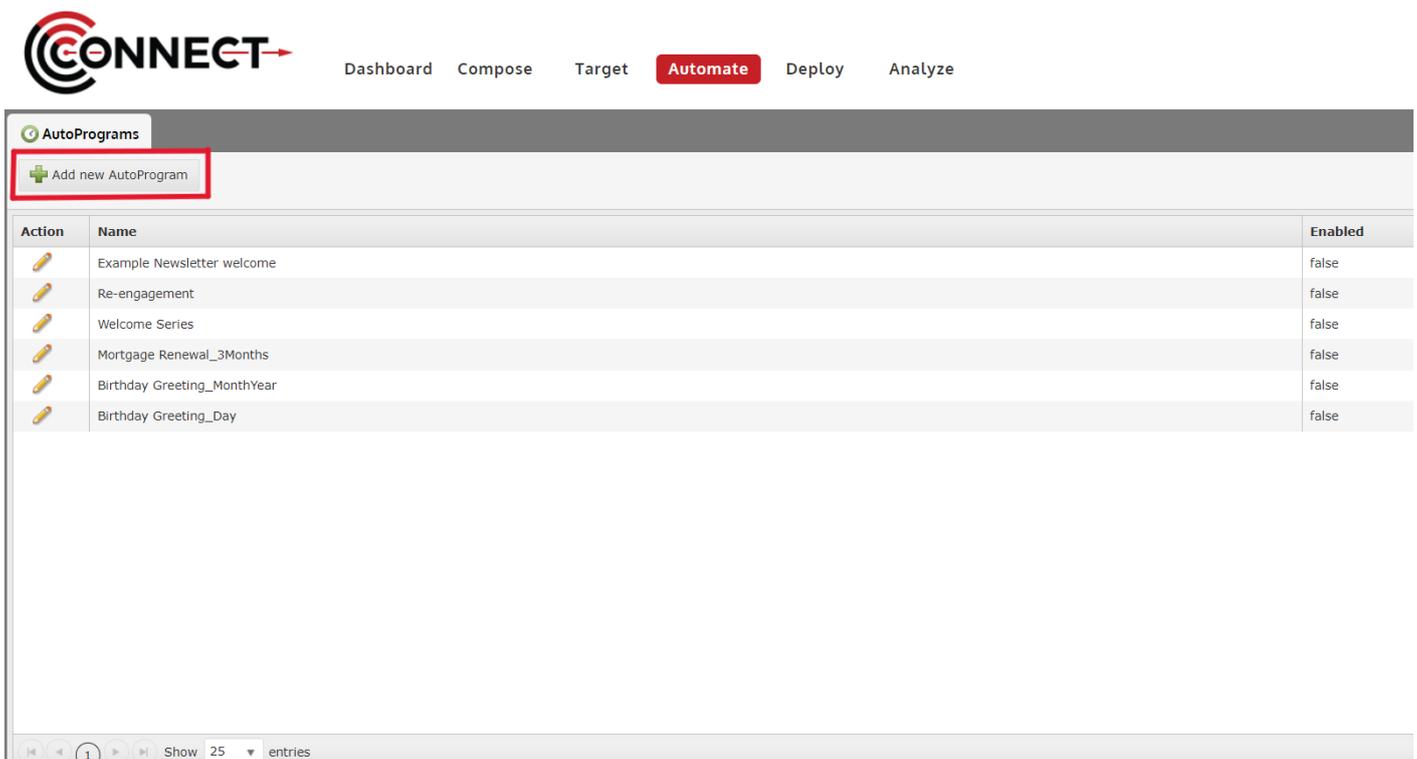
AutoPrograms allow you to set up a predetermined "stream" of messages for your records to complete.

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



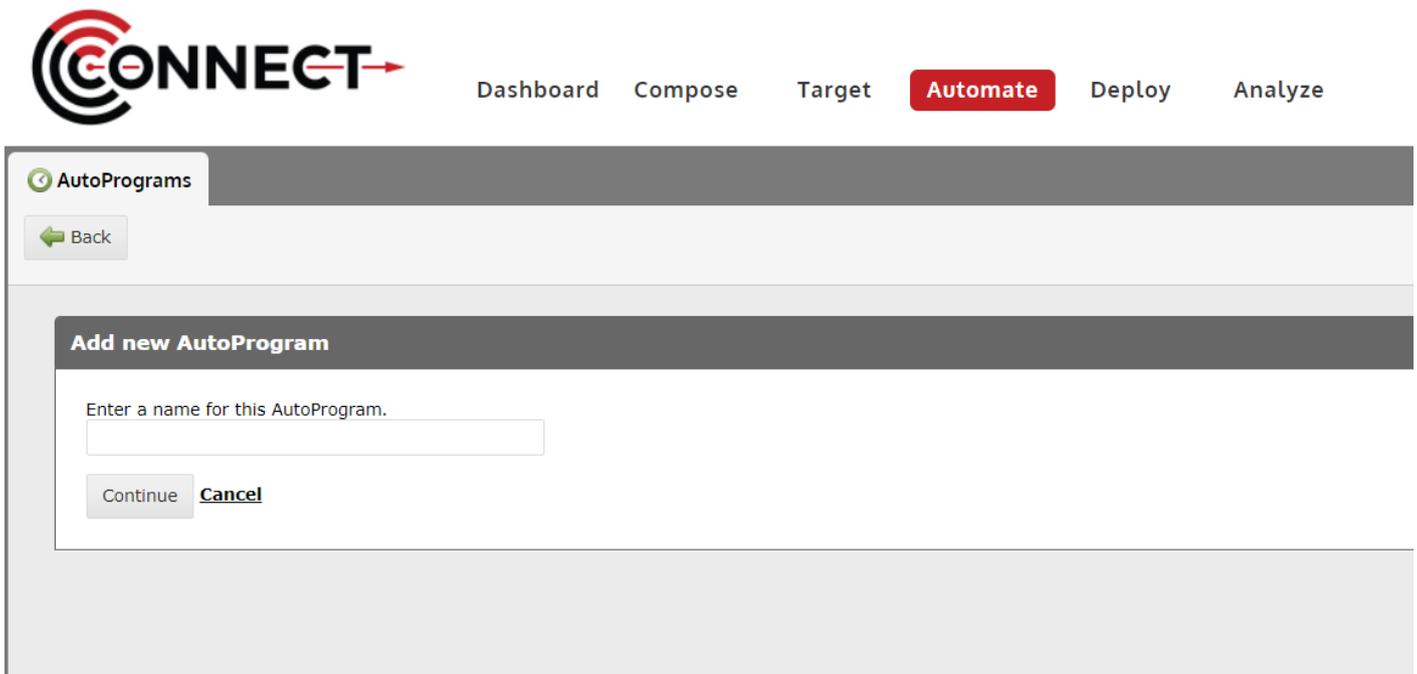
The screenshot shows the CONNECT interface with the Automate tab selected. The 'Add new AutoProgram' button is highlighted with a red box. Below the button is a table of existing AutoPrograms.

| 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 interface, there is a pagination control showing 'Show 25 entries'.

1. Click Automate Tab
2. Click Add New AutoProgram

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



The screenshot shows the CONNECT interface. The top navigation bar includes the CONNECT logo and tabs for Dashboard, Compose, Target, Automate (highlighted in red), Deploy, and Analyze. Below the navigation bar, the 'AutoPrograms' section is active, showing a 'Back' button. The main content area displays a dialog box titled 'Add new AutoProgram' with the instruction 'Enter a name for this AutoProgram.' and an empty text input field. Below the input field are 'Continue' and 'Cancel' buttons.

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 |
| | Birthday Greeting_MonthYear | false |
| | 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

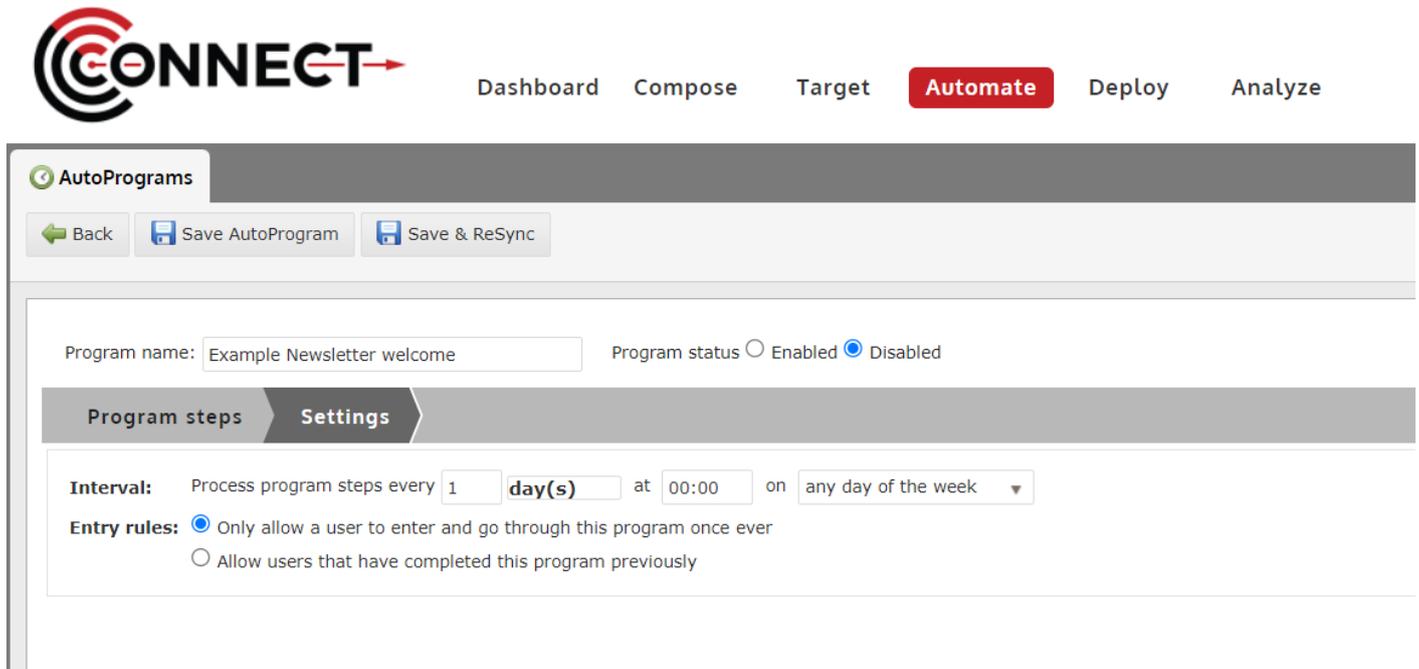
Program steps **Settings**

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 is a navigation bar with the following items: Dashboard, Compose, Target, Automate (highlighted in red), Deploy, and Analyze. Below the navigation bar, the main content area is titled "AutoPrograms". There are three buttons: "Back", "Save AutoProgram", and "Save & ReSync". The "Program name" field contains "Example Newsletter welcome". The "Program status" is set to "Disabled" (radio button selected). Below this, there are two tabs: "Program steps" and "Settings" (selected). Under the "Settings" tab, the "Interval" is set to "Process program steps every 1 day(s) at 00:00 on any day of the week". The "Entry rules" section has two options: "Only allow a user to enter and go through this program once ever" (radio button selected) and "Allow users that have completed this program previously" (radio button unselected).

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.

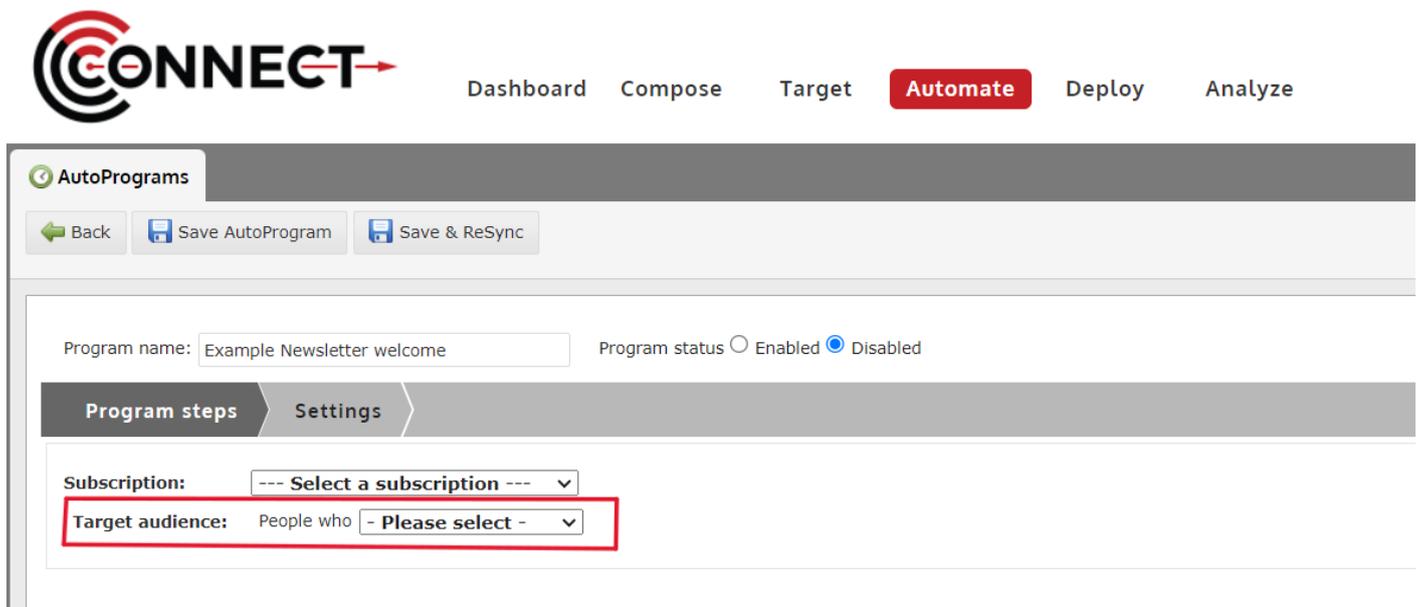
This is very important as it greatly effects your "wait periods" in the next steps of this tutorial.

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 interface with the 'Automate' tab selected. The 'AutoPrograms' section is active, displaying a 'Program name' field with the value 'Example Newsletter welcome' and a 'Program status' section with 'Enabled' and 'Disabled' radio buttons, where 'Disabled' is selected. Below this, there are two tabs: 'Program steps' and 'Settings'. The 'Settings' tab is active, showing a 'Subscription' dropdown menu with the text '--- Select a subscription ---' and a 'Target audience' dropdown menu with the text 'People who - Please select -'. The 'Target audience' dropdown is highlighted with a red border.

- 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.
-

9. Click "Add another action" if you wish to continue to add additional steps to your AutoProgram

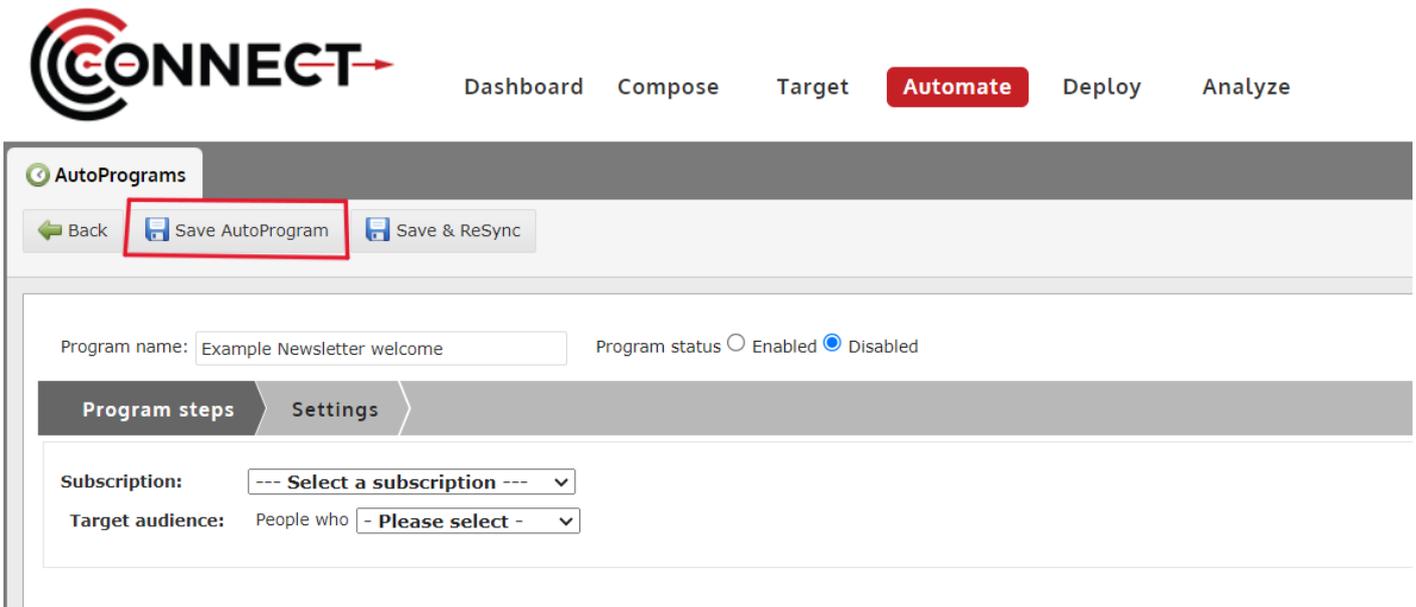
Note: If a wait period is placed after a message, the wait period begins as soon as the message is sent.

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 with the 'Automate' tab selected. The 'AutoPrograms' section is active, and the 'Save AutoProgram' button is highlighted with a red box. The interface includes a navigation bar with 'Dashboard', 'Compose', 'Target', 'Automate', 'Deploy', and 'Analyze'. Below the navigation bar, there are buttons for 'Back', 'Save AutoProgram', and 'Save & ReSync'. The 'Program name' field contains 'Example Newsletter welcome', and the 'Program status' is set to 'Disabled'. The 'Program steps' section shows 'Settings' as the active step. The 'Subscription' dropdown is set to '--- Select a subscription ---' and the 'Target audience' dropdown is set to 'People who - Please select -'.

Revision #3

Created 15 January 2020 23:15:39 by Admin

Updated 26 October 2023 20:30:11 by Matthew Monteiro