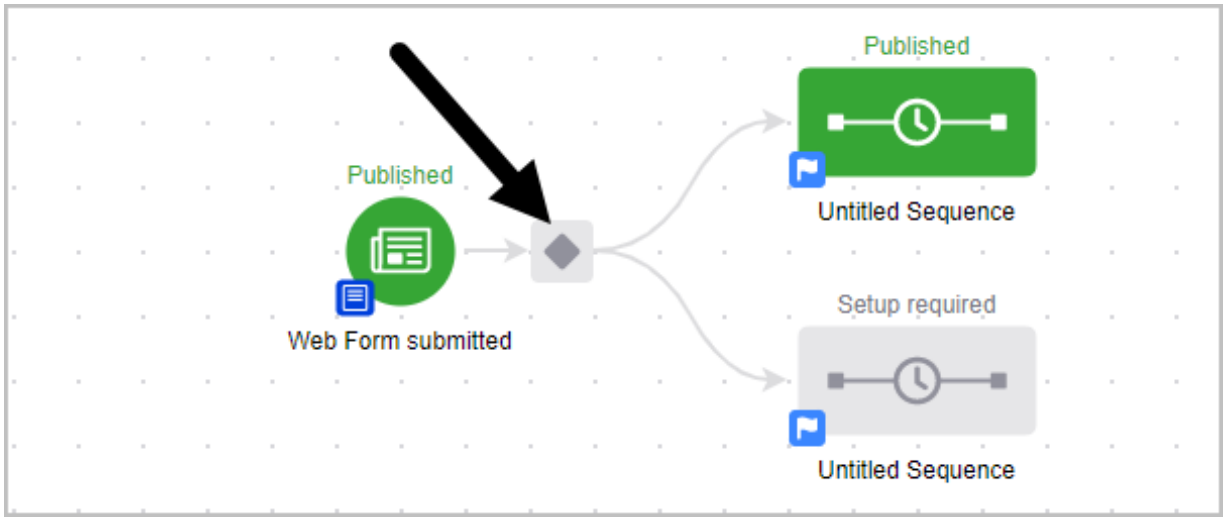
Decision Diamonds

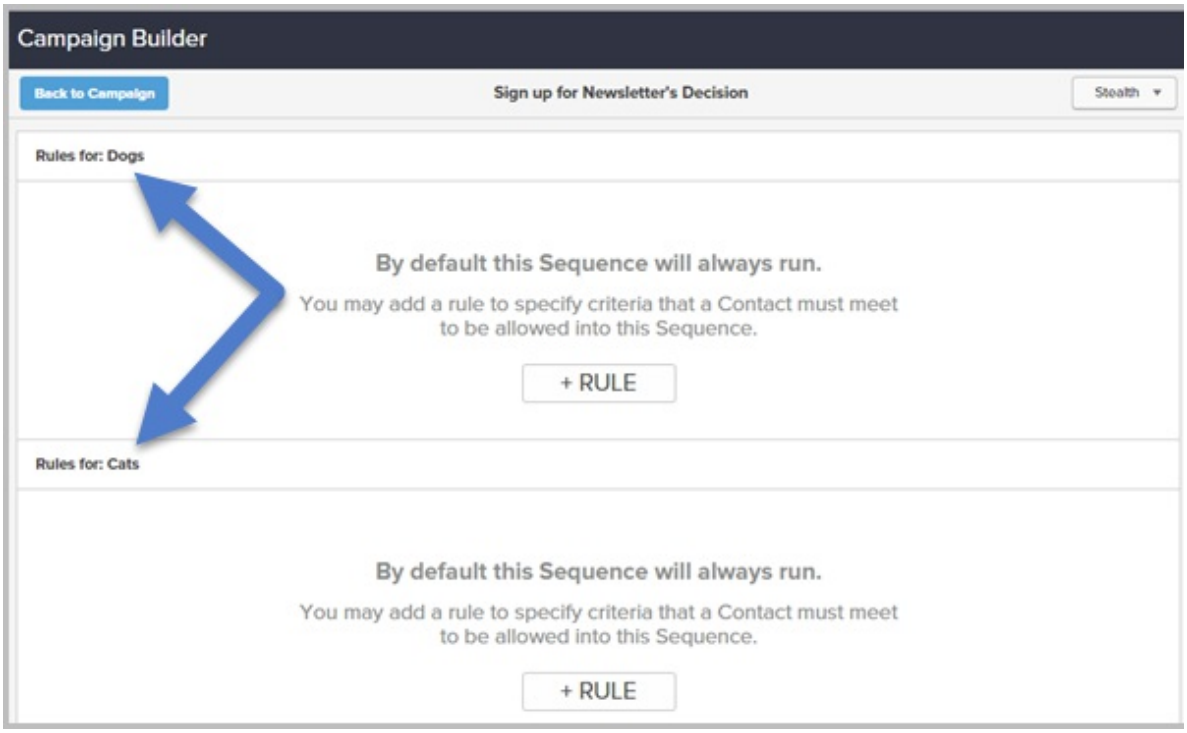
When you create a campaign, some of your business goals may have more than one possible outcome, and each outcome may take the contact down a different path. When this happens, Infusionsoft® evaluates the information available and chooses the appropriate sequence. In the example below, there is a newsletter goal connected to two sequences: Dogs and Cats. Let's assume the sign-up form asks the user which animal they are interested in. If they choose Dogs, they go into the Dogs sequence. If they choose Cats, they go into the Cats sequence.

Pro-tip! Decision diamonds are created automatically when a campaign goal or a campaign sequence connects to two or more sequences.



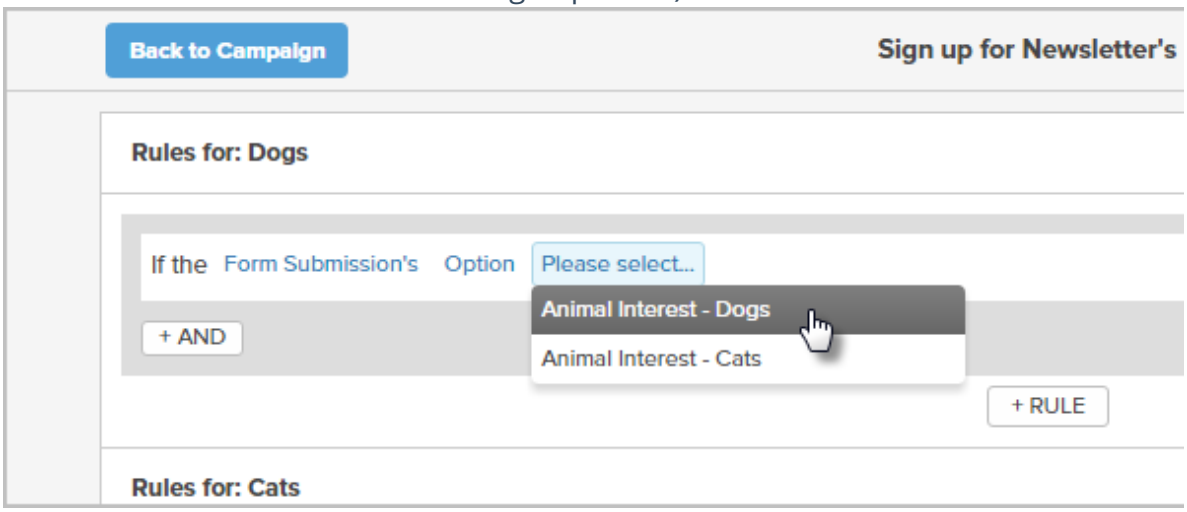
1. Double-click the Diamond icon to set up the rules.
2. On the Decision Rules screen, you will see at least two separate set of rule areas: In this example, there is one for the Dogs sequence and one for the Cats sequence. If we had another sequence for Hamsters, we would have that option on this page as well.

   Pro-Tip! The order in which the sequences appear on this page is determined by which item you connected the goal first. I connected my web form goal to the Dogs sequence first, so it is at the top of the page.



3. Click **+ RULE** button to set up your rule for each sequence. Rules can be based on tags, radio or checkbox options, custom fields and the following contact fields: Title, Job Title, City, State, Country, Birthday, Contact Type or Owner. If contacts match more than one rule, they enter multiple campaign sequences. If no sequence rules are assigned, then all contacts begin the related campaign sequence.

   My rule for entering the Dogs sequence is that the user must choose the dogs radio button on the newsletter sign-up form. The criteria for this rule is shown below: *Form Submission* > *Option* > *Animal Interest - Dogs* > *is selected* (Animal Interest is the radio button on the newsletter sign up form.)

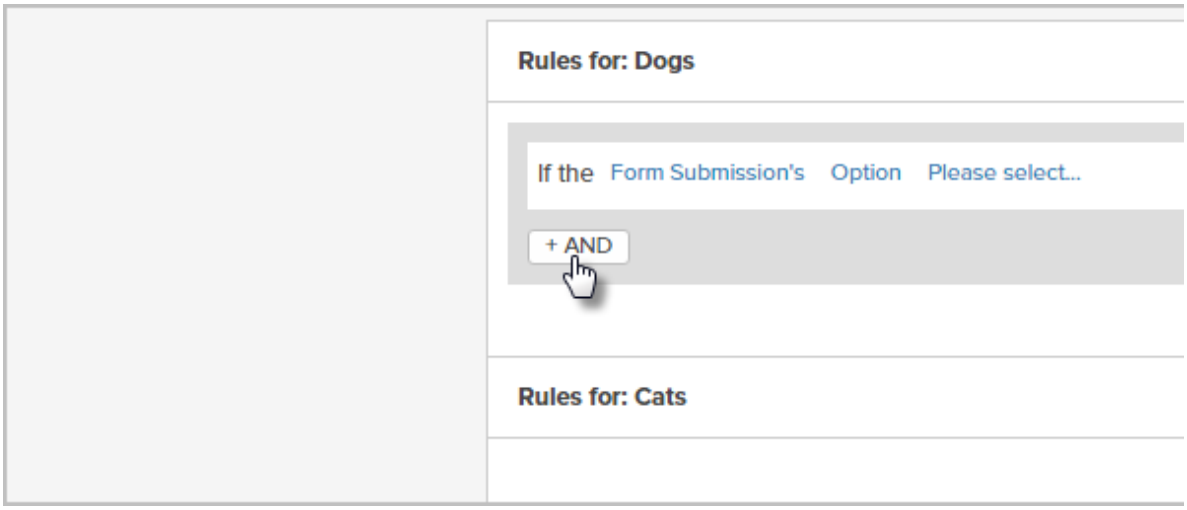


   Now, whenever someone chooses the Dogs radio button on the sign up form, they enter the Dogs sequence.

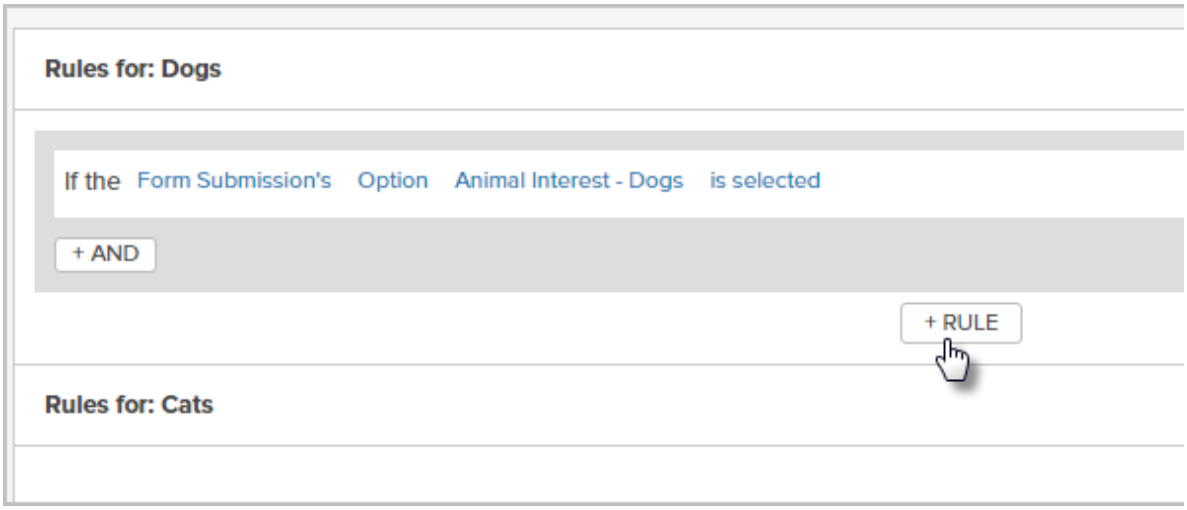
4. If a sequence path has more than one criteria, click the **+ And** icon to add other

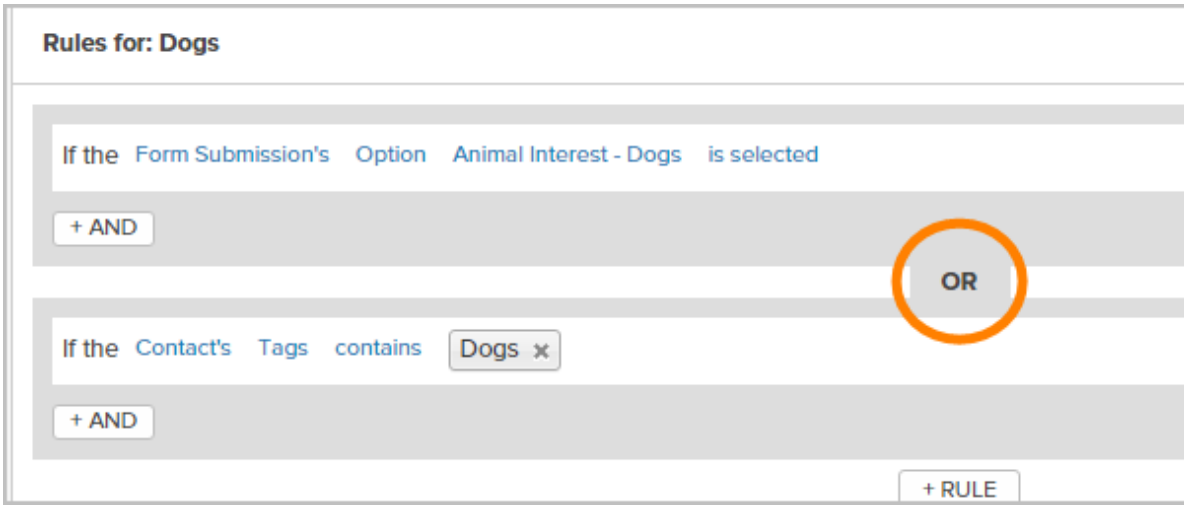
criteria

Pro Tip! When you add the next criteria in this manner, the first criteria and the second criteria must be true for the sequence to run. You can add an unlimited number of criteria.



5. You can also add an alternative rule or set of rules for each sequence. When you click on the small **+ Rule** button, you are now adding separate criteria that can be met in order to move the contact into the Dogs sequence. When you add an alternative set of criteria, the first set of criteria must be true OR the second set must be true. In the example below, they will be moved into the Dogs sequence of they chose the Dogs radio button, or they have Dogs tag applied to their contact record.





6. Click on **Back to Campaign** when all of the sequence rules have been defined.

7. Advanced Logic Cheat Sheet. In the example above, the scenario is straightforward: They chose Dogs or Cats when they sign up on the web form. For more advanced criteria, here is a cheat-sheet showing the different rule combinations and what scenario they should be applied to:

Decision Diamond Rule Criteria	OR	AND
Contains	Contact has ANY one of these tags	Contact has ALL of these tags
Doesn't contain	See note below	Contact Doesn't have ANY of these tags

Doesn't contain "A" or "B": This logic doesn't work due to the reason that the campaign will only check the first part of the rule. The proper way to set this up is Doesn't contain "A and B".

Pro-Tip! Some campaigns containing decision diamonds may benefit from a Catch-All sequence. A Catch-All sequence is an empty sequence titled 'Catch-All' or 'Other' that is connected to the decision diamond. It has no criteria rules so all contacts will fall there. The purpose is to create a backup list of contacts that have passed through the decision diamond. A catch-all sequence in your campaign allows you to keep contacts in their current place in the campaign while keeping a backup list of all contacts that passed through the decision diamond. This enables you to review any contacts that did not meet the criteria set for possible inclusion in another sequence.