

Connecting Objects In A Campaign Sequence

A sequence is assembled by arranging a series of timer, communication, and process objects on the sequence canvas. If only one series of objects is needed, connections are automatically created as you add objects to the canvas from left to right. If there is more than one series of objects in a sequence (e.g., a communication series and a work flow series), then you will manually connect sequence objects.

Each sequence series is a linear process. Each object connects to one other object. If an object is not connected to a previous sequence object, it will not run. If there is more than one series of objects in a sequence, they run simultaneously. Connections are active as soon as a campaign is published. However, the related sequence objects (timers, communications, and processes) will not run until they are also configured or marked as Ready and published to the campaign.

Start Timer to Any Object

The start timer is required. Do not delete it! A start timer can be connected to a timer object or communication/process object.

- Connect the timer to a communication/process object first if you want them to happen immediately.
- Connect the start timer to a timer object first if you want to delay the first

communication/process in the series.

- If you want to start multiple processes within the same sequence, just add more start timers.

Timer to Communication/Process

- If the timer between two communication/process objects is configured, the sequence holds the future item (to the right of the timer) until the timer schedule is met, then the sequence proceeds.
- If the timer between two communication/process objects is not configured, the sequence will run until it reaches the unconfigured timer, then it will pause until the timer is configured.
- If all of the sequence timers are configured, but some of the communication or process pieces are not configured or marked as ready, the sequence will skip the unfinished pieces and proceed to the next ready object.

Communication/Process to Communication/Process

If there is no timer between two communication/process objects in a sequence, they will run simultaneously.

Timer to Timer

You can connect a timer to another timer, but this does not really make sense. One timer between objects provides many flexible scheduling options.

Multiple Series within a Sequence

You can create multiple communication and/or process series within a single sequence. All of the series run in parallel. You may create multiple series when the sequence requires external communication to a prospect or customer and internal communications or processes. Creating two series allows you to segment and track each one separately. When a new client signs up with Rainy Day, they send a welcome series to the client, but also start an internal work flow series to schedule a task for one of their admins to create a new client file.

1. To insert a new object between existing connected objects, drag and drop the object when the connecting line becomes bold.

2. To delete an object, click on the object, then click the delete icon.

Warning! If you delete a communication piece, the custom content you've

added will also be deleted. If you want to be able to restore a communication piece, you must save it as a template before deleting it from the sequence canvas.
