


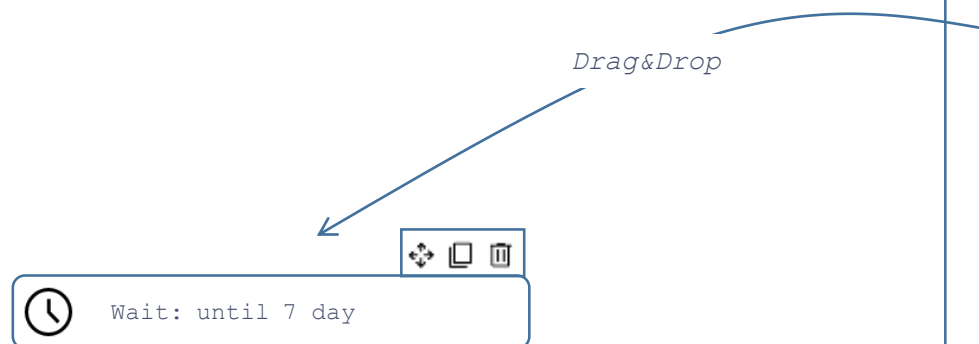


AUTOMATITZACIÓ

- Tota automatització té un Nom i se li pot afegir un o varis Tags
- Pot estar Activa / Inactiva
- Pot tenir una data de començament i finalització
- Pot funcionar una sola vegada per Persona o Vàries
- Les Automatitzacions es poden Crear, Clonar, Eliminar, Editar, Guardar

ACCIÓ

- Les Accions s'afegeixen (amb el drag/drop dels blocs)
- Les Accions es poden eliminar 
- Les Accions es poden duplicar 
- Les Accions es poden moure 

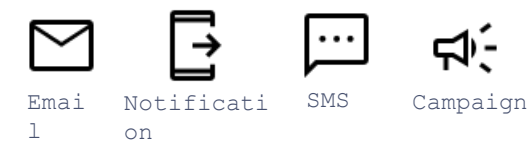


ACCIONS

LIST



SENDING



CONDITIONS & WORKFLOW



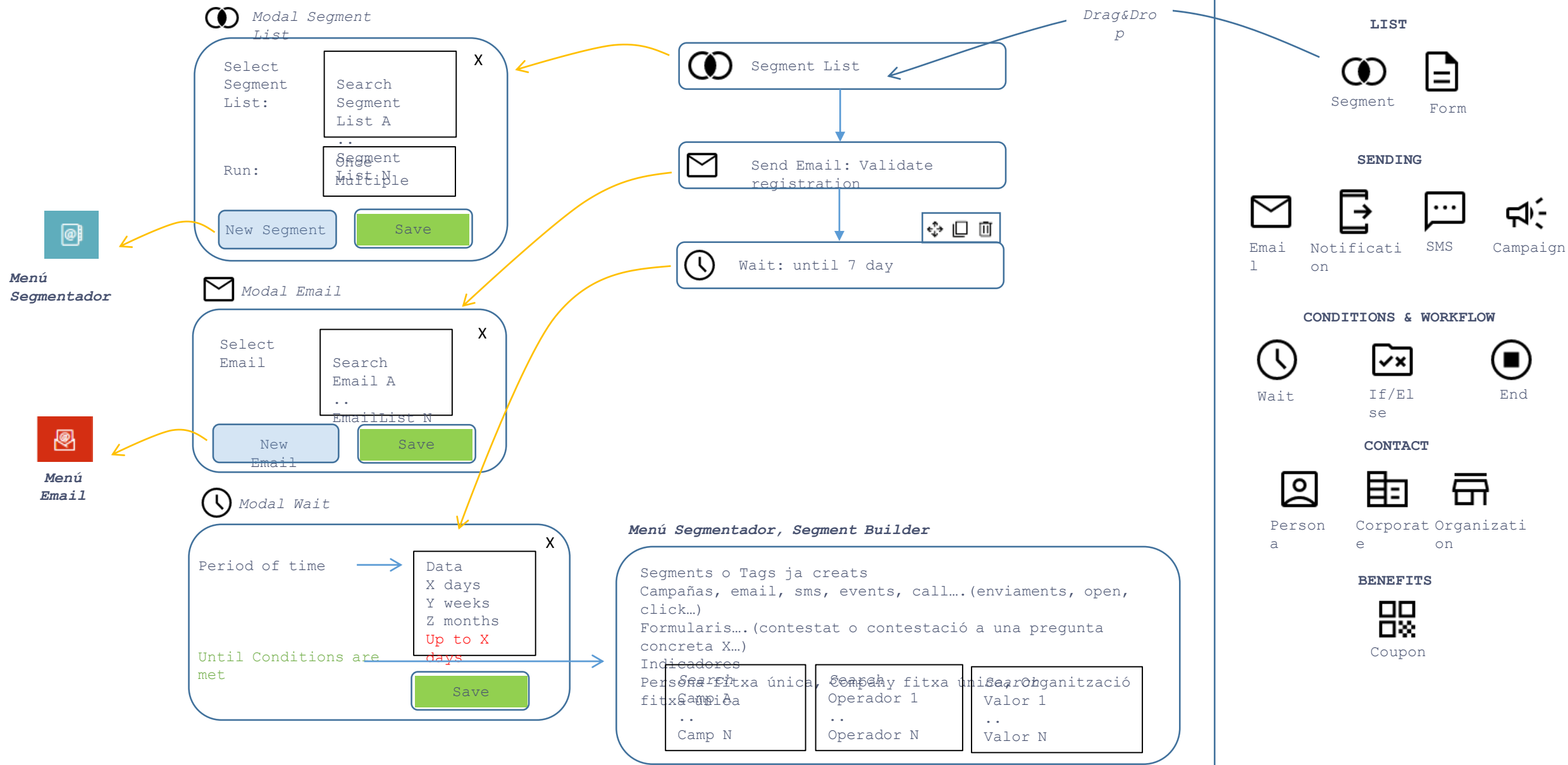
CONTACT



BENEFITS



AUTOMATION: Modals per bloc d'Acció



AUTOMATION: Modals per bloc d'Acció

ACCIONS

LIST



SENDING



CONDITIONS & WORKFLOW



CONTACT



BENEFITS



Modal Segment List

Select Segment List:

Search Segment List A

..

Segment List N

Run:

Segment List Multiple

New Segment

Save

Modal Email

Select Email

Search Email A

..

Email List N

New Email

Save

Modal SMS

Select SMS

Search SMS A

..

SMS N

New SMS

Save

Modal Form

Search Form A..N

Search Camp A

..

Camp N

Search Operator 1

..

Operator N

Search Valor 1

..

Valorr N

New Form N

Save

Modal Notification

Select Notification

Search Notification A

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Notification N

New Notification N

Save

Modal Campaign

Select Campaign

Search A Campaign A

..

Campaign N

New SMS

Save



Menú Form



Menú Email



Menú SMS

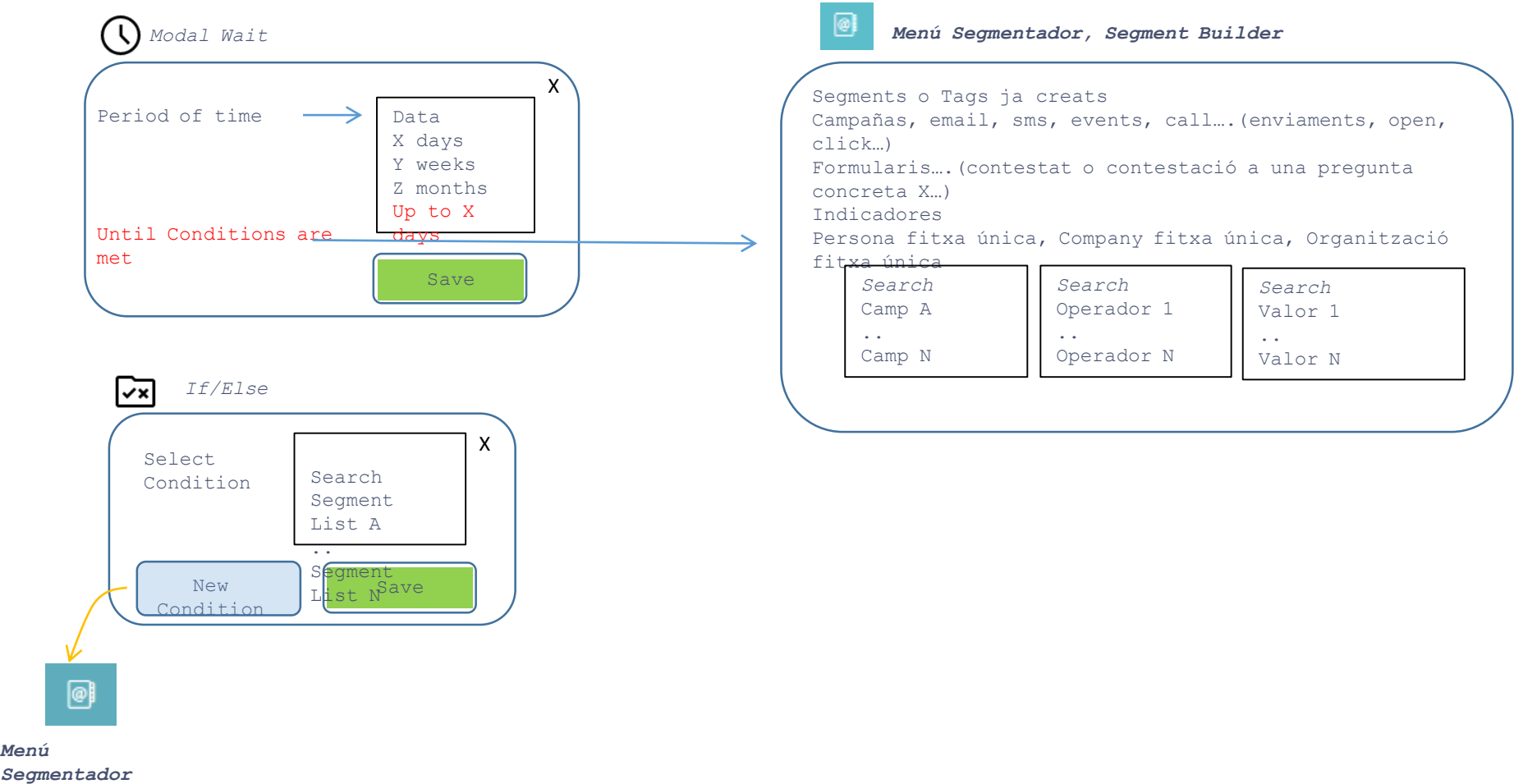


Menú Notification



Menú Campaign

AUTOMATION: Modals per bloc d'Acció



ACCIONS

LIST

Segment Form

SENDING

Email Notification SMS Campaign

CONDITIONS & WORKFLOW

Wait If/Else End

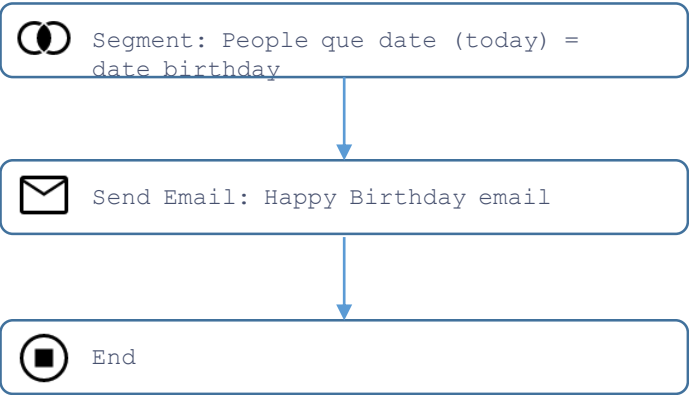
CONTACT

Person Corporate Organization

BENEFITS

Coupon

AUTOMATION: Cas Dinosol: Enviar un email aniversari



ACCIONS

LIST


Segment


Form

SENDING


Email


Notificati
on


SMS


Campaign


CONDITIONS & WORKFLOW



Wait



If/El
se


End

CONTACT


Person
a

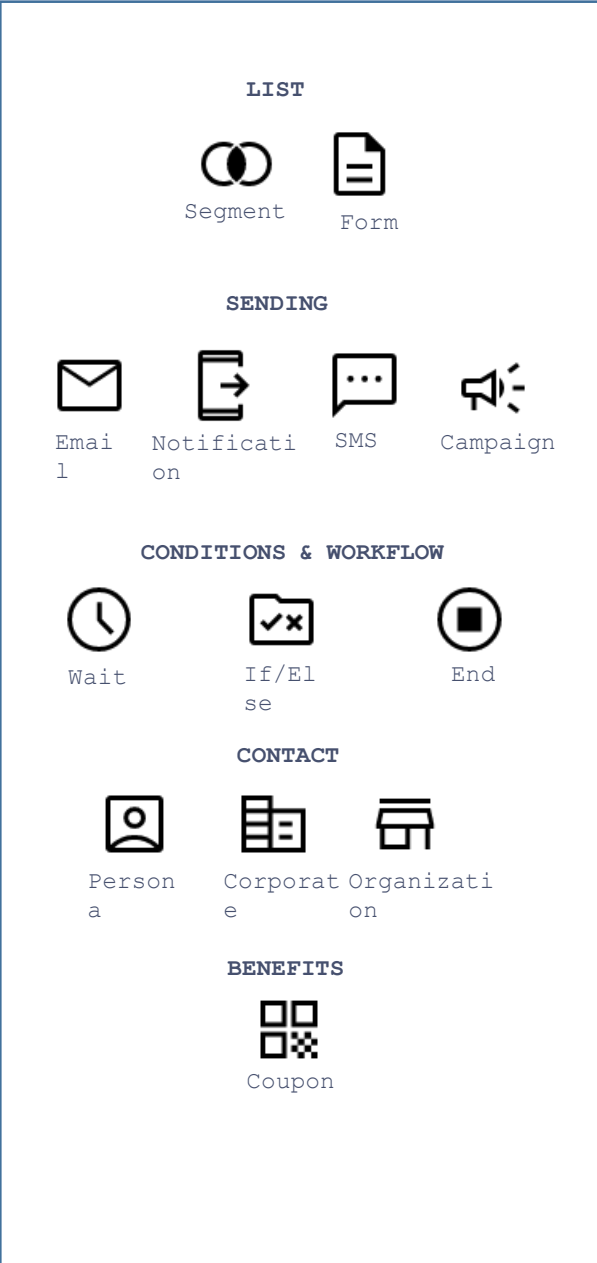
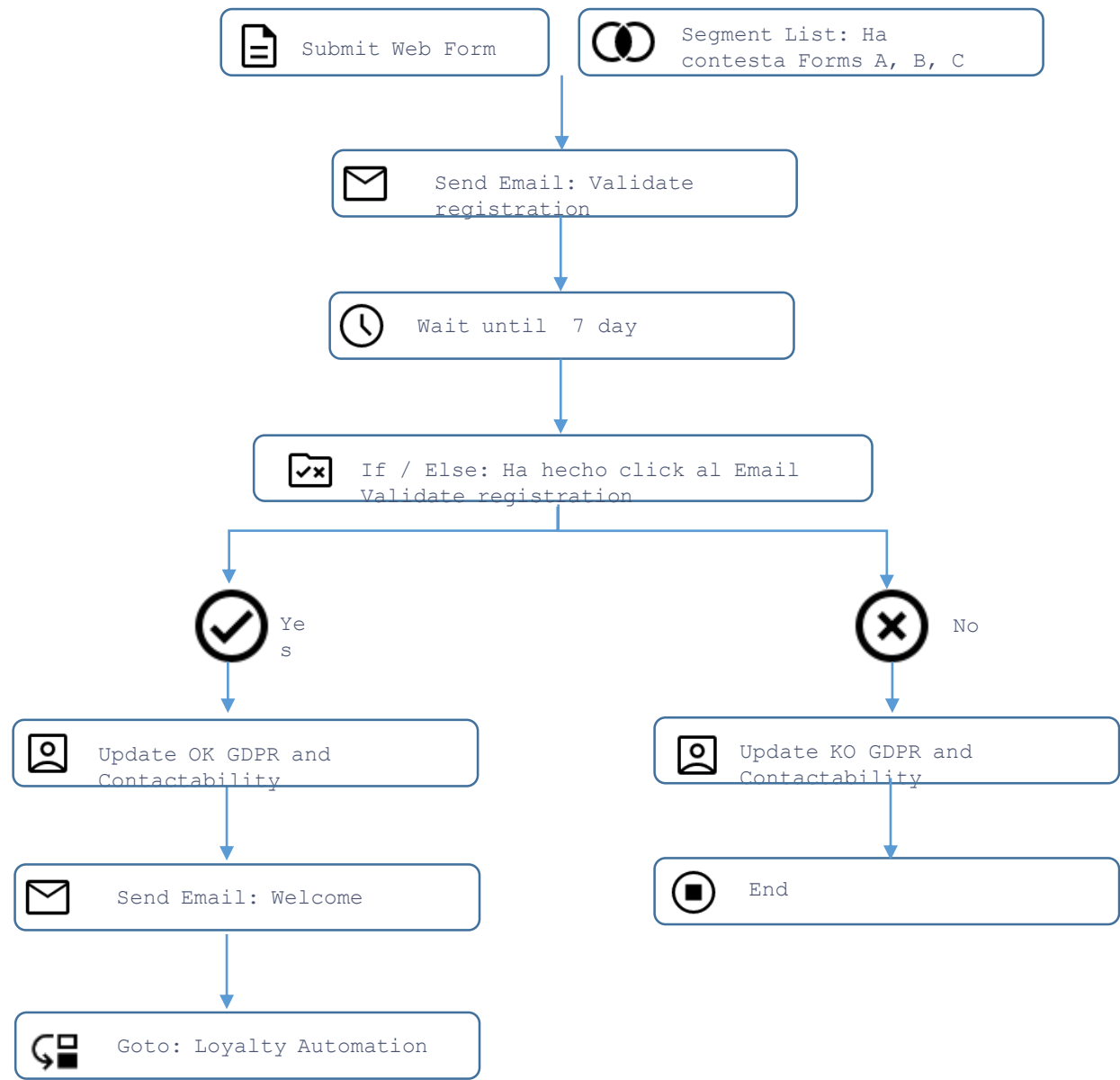

Corporat
e


Organizati
on

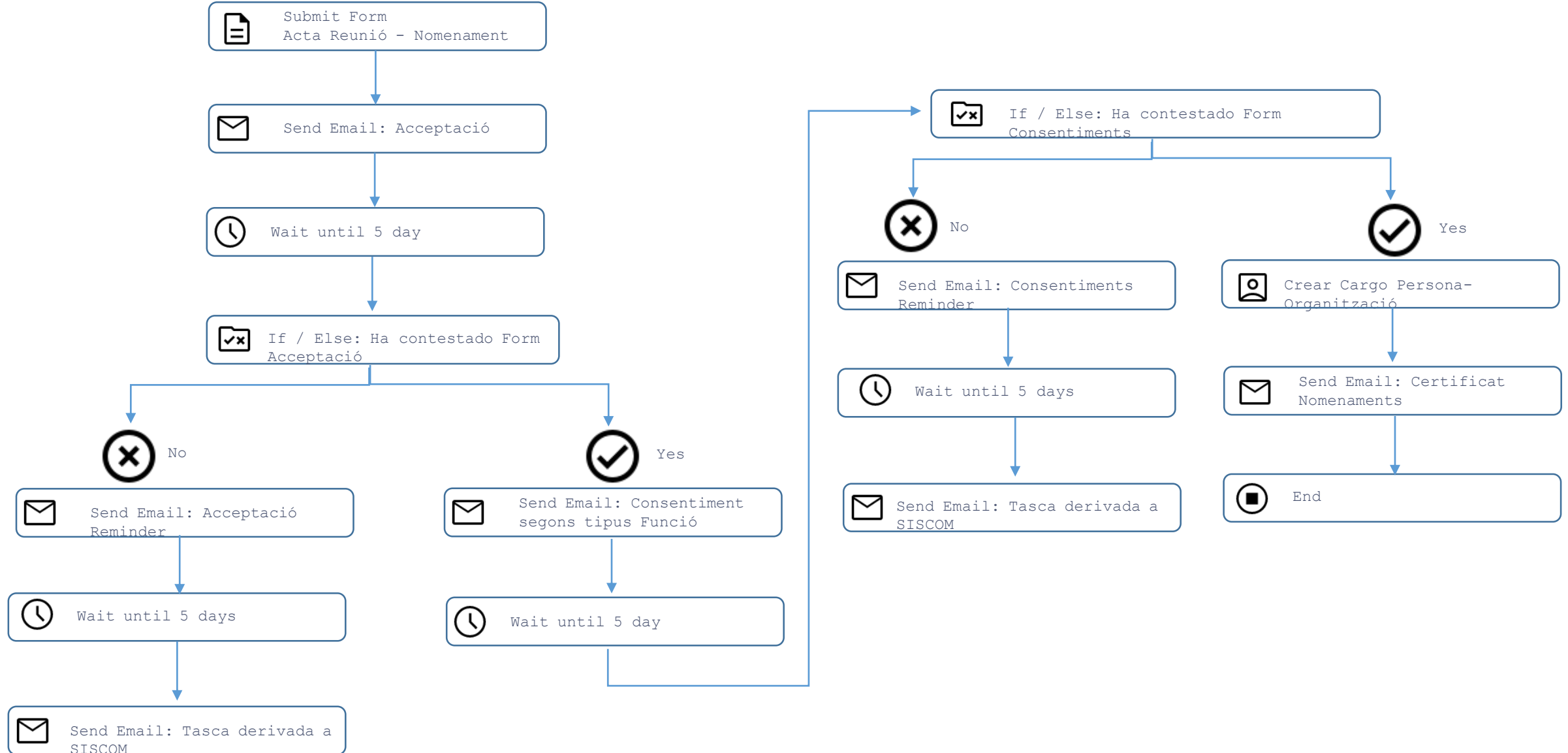
BENEFITS


Coupon





AUTOMATION: Cas Kenya: Enviar un email welcome als que acaben d'entrar a la bbdd










AUTOMATION: Cas CCOO: Nomenament, Acceptació, Consentiments, Tasca derivada









AUTOMATION: ACTIONS

Icon	Action	Description	Dinosol
	Segment	Group of people that match a set of conditions A person can belong to different segments and they don't have to be automation related	Qualsevol segmentació feta
	Tag	The "Add tag" action will apply a tag to a contact when they reach this step. The "Remove tag" action will remove a tag from a contact when they reach this step. Tags are temporary and unique for automation. Person should have only one tag per automation at the same time	
 	Indicator	Execute calculations on existing custom contact fields or custom deal fields. P.e. Rewards scores action moves a contact score up or down when they reach this action in your automation. If the proceeding actions indicated sales-ready behavior, you could add points to their score. You could give out negative points if the contact unsubscribes or fails to engage (open or click) your campaigns. Note that you can also set the contact score to a specific value or reset the score to 0 with this action.	
	Form	Question Answer conditions or Form answer	




AUTOMATION: ACTIONS

Icon	Action	Description	Dinosol	Kenya	CCOO
	Email	This action will send an email to the contact who goes through this step of the automation. You would have to previously design the email. You are able to time the email by placing a wait condition before it. Note that the contact will need an email address to receive the message.			
	Notification	When a contact reaches this action in your automation, a text message will be sent to the CMS app (p.e. Magento) . You would have to previously design the notification.			
	SMS	When a contact reaches this action in your automation, a text message will be sent to them. You would have to previously design the notification			
	Call	When a contact reaches this action in your automation, the contact will be available in a Telemarketing web to call them.			
	Event	When a contact reaches this action in your automation, the contact will be available in a Event web to control their participation. You would have to previously design the Event form			
	Website	This action lets you display messages to an opted-in contact when they visit a specific page on your site or any page of your site. You may want to use this to display information about a new offering or a coupon code for a product to get your contact to complete a purchase. In order to use this feature, you must have site tracking installed and enabled on your site. You would have to previously design the Website message			
	RSS	When a contact reaches this action in your automation, a text message will be sent to the Social app (p.e. Hootsuite) . You would have to previously design the RSS asset			
	Campaign	When a contact reaches this action in your automation, you'll be able to apply filters at Campaign hierarchy			





AUTOMATION: ACTIONS

Icon	Action	Description	Dinosol	Kenya	CCOO
	Wait	<p>The wait action pauses the automation for the contact at this step. You are able to specify how long they wait before proceeding to the next action in their automation path. There are two types of wait actions that you can create:</p> <ul style="list-style-type: none">- Timed wait: Contacts will wait in this action for a period of time you specify, then proceed to the next action in the automation.- Conditional wait: Contacts will wait in this action until certain conditions are met, for example, until they perform a certain behavior or until you collect certain information about them. Wait conditions are created with the segment builder. In addition, you have the option to set a time limit for how long a contact will wait in this action if they don't meet the conditions to proceed.			
<div> </div>	If/Else	<p>An "If/Else" action creates a fork in your automation. There are two paths in this fork: A "Yes" path and a "No" path.</p> <p>The "Yes" path is for contacts who match the conditions you define and then "No" path is for contacts who do not match the conditions. "If/Else" conditions are created with the segment builder.</p>			
	Split	<p>The "Split" action allows you to create split test automations.</p> <ul style="list-style-type: none">- Even split: A traditional A/B split test determines a winning path.- Conditional split: This split will send all contacts down one path until specific conditions are met and then a different path after. This is not a traditional split test and no winning path is determined. Conditions for this split are created with the segment builder. There are three options to choose from: Until X total contacts have been sent to "Path A", Until X total contacts completed a goal, On a certain date or time			
<div> </div>	<div>End</div> <div>Goal</div>	<p>- The "End this automation" action is an indication that the automation ends at this point.</p> <p>Even without the "End this automation" action, your automation would still end when your contact reaches the last step of the automation. This action is more of a "note" that there are no more steps for the contact to take in your automation.</p> <p>- The "End other automation" action stops the contact from running through all automations or an automation you specify.</p> <p>- The "Webhook" action sends a webhook to another application, allowing you to automate actions with apps outside of ActiveCampaign.</p> <p>For example, you can use this action to send a webhook to have a support account created with your helpdesk software when a new order is received.</p> <p>The "Goal" action allows contacts to jump from their current location in your automation to that goal step if they meet the conditions to do so. Conditions for this action are created with the segment builder. You can use this to begin other automations, send targeted messages to contacts, adjust contact and deal scores, and even add a contact to a specific step in your automation upon entry.</p>			

AUTOMATION: ACTIONS

Icon	Action	Description	Dinosol	Kenya	CCOO
	Persona	This action allows you to add data to the Contact record. You could use this action to add data to a custom field.			
	Corporate	This action allows you to add data to the Corporate record. You could use this action to add data to a custom field.			
	Organization	This action allows you to add data to the Organization record. You could use this action to add data to a custom field.			

AUTOMATION: ACTIONS

Icon	Action	Description	Dinosol	Kenya	CCOO
	Pipeline	This action moves a deal to another stage of your pipeline. This action is a crucial part of automating your sales process so you may use it often. When a contact performs a certain behavior, such as replies to an email or visits a link you sent them to, you could move them further down the pipeline.			
  	Deal, Task	<p>The "Add deal" action creates a deal record for an opportunity. This action lets you automatically create deals for contacts as they reach sales readiness. You may want to use this action with a "Score changes" trigger so that when a contact score reaches a threshold score, a deal record is automatically created and placed in your pipeline.</p> <p>The "Add task" action creates new to do items. This action is very useful for staying organized and making sure no lead falls through the cracks. You can automatically add tasks as the pipeline stage changes so that all associated work has task reminders created.</p> <p>https://help.activecampaign.com/hc/en-us/articles/360001106459#set-up-your-custom-domain-for-salesforce-lightning-0-2</p>			
	Raffle	This action moves a contact into a raffle.			
	Coupon	This action generates a coupon for the contact.			