Automation processes can perform various types of marketing actions. By integrating actions into processes, you can automate tasks that users would otherwise need to do manually. For example, you can have a process send an email to contacts that meet a certain condition or move contacts between different accounts.

You can add actions into the flow of processes via **action steps**. When a contact reaches an action step in a process, the system automatically performs the given action.

The following action steps are available:

Action step	Description
Change contact account	Adds or removes the contact from an account.
Change contact group	Adds or removes the contacts from a contact group.
Delete contact	Deletes the contact currently going through the automation process.
Import to Salesforce	Replicates the contact into a lead in a target Salesforce organization. You need to have Salesforce replication set up for your websites to use this action.
Log custom activity	Logs a custom activity for the contact.
Newsletter subscription	Subscribes or unsubscribes the contact from a newsletter.
Send transactional email	Sends a transactional email (for example subscription confirmation) to any address.
Send marketing email	Sends a marketing email (i.e., newsletter or email campaign) to the contact. **Note**: When performing this action step, the process automatically adds the contact as a recipient.
Set contact property	Inserts a new value into one of the contact's properties (fields). Culture-dependent data used in the 'Property' value of this action need to be entered in the 'en-US' culture format. For example, the MDY format should be used for dates (12.21.1989).
Set contact status	Changes the contact's status.
Start process	Triggers a different marketing automation process for the contact. Based on the recurrence settings of the target process, this action can result in multiple unnecessary instances of the process running concurrently.

Managing contact accounts

1. Place the **Change account** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Specify the step's parameters:

- **Account name** – select an account for the action to manage.
- **Contact role** – you can have the process assign a specific role within the account to the contact.

- **Action** – you can either add the contact to the specified account or remove it from the account.

5. Click **Save**.

See also: Organizing contacts into accounts

Managing contact groups

1. Place the **Change group** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Specify the step's parameters:

   - **Contact group** – select a contact group for the action to manage.
   - **Action** – you can either add the contact to the specified group or remove it.

5. Click **Save**.

See also: Segmenting contacts into contact groups

Setting contact properties

1. Place the **Set contact property** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Select which contact property the action changes (**Property name**).
5. Type the new **Property value**.
6. Click **Save**.

See also: Working with contacts

Setting contact statuses

1. Place the **Set contact status** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Select the new **Contact status** that the action assigns to contacts.
5. Click **Save**.

See also: Assigning statuses to contacts

Deleting contacts

1. Place the **Delete contact** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Click **Save**.

See also: Working with contacts

Replicating contacts to Salesforce

1. Place the **Import to Salesforce** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Specify the step's parameter:

- **Deferred replication** – if checked, the action step delays the replication of the contact until the system executes the scheduled replication process. When disabled, the action replicates the contact immediately. Using deferred replication helps reduce the number of Salseforce API calls made by your application.

5. Click **Save**.

See also: Salesforce integration

Logging custom activities

1. Place the **Log custom activity** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Specify the step's parameters:

   - **Activity type** – select one of your custom activity types.
   - **Activity site** – select the site for which you want to log the activity.
   - **Activity title** – add basic information about the event that the activity represents.
   - **Activity value** – you can assign a value to the activity. You can associate values with activities such as ratings or e-commerce purchases.
   - **Activity URL** – enter the URL of the page where the activity occurred.
   - **Campaign** – you can select a marketing campaign associated with the activity.
   - **Comment** – here you can add any additional information related to the activity.

5. Click **Save**.

See also: Tracking contact activities, Adding custom activity types

Managing newsletter subscriptions

1. Place the **Newsletter subscription** action step onto the process designer grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Select a **Site** and a specific **Newsletter**.
5. Select the **Action** – you can either subscribe the contact to the newsletter or unsubscribe the contact from the newsletter.
6. Click **Save**.

See also: Email marketing

Sending transactional emails

Prerequisites: You must have at least one SMTP server configured for your websites.

1. Place the **Send transactional email** action step onto the grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Enter the sender's address into the **From** field.
5. Specify the recipients of the email in the **To** field.
   - You can enter multiple addresses separated by semicolons.
   - Use macro expressions to load the address dynamically. For example, *{% Contact.ContactEmail %}* gets the address of the current contact in the process.

6. Choose the content type of the email:

   - **Email template** – the content of the email is based on the selected Email template.

- **HTML formatted text** – manually write the *Subject* and *Body* of the email.

7. Click **Save**.

Sending marketing email

1. Place the **Send marketing email** action step onto the grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Select a **Site** and an **Email** that the action step sends.
    - You need to choose both the email feed and specific email.

5. Click **Save**.

See also: Email marketing

Starting automation processes

1. Place the **Start process** action step onto the grid.
2. Integrate the step into the flow of the process by connecting a preceding and following step.
3. Edit the step by clicking the pencil icon next to its name.
4. Select the automation **Process** that you want to start for the contact.

    - You cannot start a new instance of the same process that you are designing (to avoid the possibility of process loops).

5. Click **Save**.

Adding custom actions

Kentico allows developers to create custom action steps for use in automation processes. Developing actions step requires knowledge of programming and the Kentico API.

See Developing custom marketing automation actions for more information.