

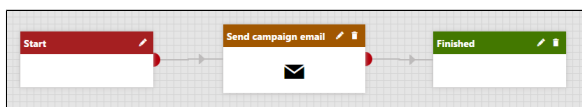
This chapter describes the process designer, a built-in tool that provides a visual representation of [marketing automation](#) processes. The designer allows you to define the steps that implement the functionality of automation processes.

## Accessing the process designer

To open the process designer for an automation process:

1. Open the **Marketing automation** application.
2. **Edit** (✎) the process that you want to design.
3. Switch to the **Steps** tab.

The following image shows the appearance of the designer for an automation process consisting of the *Start*, *Send campaign email* and *Finish* steps. The steps are connected by transition lines. The direction of the arrows indicates which way the process moves forward.



### Tip

If your graph doesn't fit into the designer area, click an unoccupied area of the grid and drag to expose additional free space.



### Prerequisite

Windows Communication Foundation must be [configured](#) for the advanced workflow designer to work.

## Standard steps

You can use the following types of basic steps to design automation processes:

Step	Description
Standard	Basic approval step. Allows designated users or roles to <a href="#">decide</a> whether the process continues to the next step.
Condition	Splits the process into two branches based on a condition. The process automatically transitions to the next step according to the result of the condition.  See: <a href="#">Defining automatic decisions</a>
Multi-choice	Splits the process into any number of branches based on a set of conditions. <ul style="list-style-type: none"> <li>• If exactly one condition is met, the process automatically continues through the given branch.</li> <li>• If multiple conditions are fulfilled, designated users need to <a href="#">manually choose</a> the next step.</li> </ul> See: <a href="#">Defining automatic decisions</a>
First win	Splits the process into any number of paths based on a set of conditions. The process automatically continues through the branch whose condition is met first.  See: <a href="#">Defining automatic decisions</a>
User choice	Splits the process into any number of branches. Designated users need to <a href="#">manually choose</a> the next step for each contact in the process.  See: <a href="#">Defining user choice steps</a>

Wait	Halts the process for a specified amount of time before continuing to the next step.  See: <a href="#">Adding wait steps</a>
Finished	Represents the end of the process.

## Action steps

You can also embed [actions](#) into processes. When a contact reaches an action step in a process, the system automatically performs the given action.

Action step	Description
Change contact account	Adds or removes the contact from an <a href="#">account</a> .
Change contact group	Adds or removes the contacts from a <a href="#">contact group</a> .
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 <a href="#">Salesforce replication</a> set up for your websites to use this action.
Log custom activity	Logs a <a href="#">custom activity</a> for the contact.
Newsletter subscription	Subscribes or unsubscribes the contact from a <a href="#">newsletter</a> .
Send transactional email	Sends a transactional email (for example subscription confirmation) to any address.
Send marketing email	Sends a <a href="#">marketing email</a> (i.e., newsletter or email campaign) to the contact.  <b>Note:</b> 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 <a href="#">status</a> .
Start process	Triggers a different marketing automation process for the contact.  Based on the <a href="#">recurrence settings</a> of the target process, this action can result in multiple unnecessary instances of the process running concurrently.



### Tip

If your developers [create custom actions](#), you can add them through the designer as well.