This topic describes how you can add new and delete marketing automation processes.

- Creating marketing automation processes
- <u>Deleting marketing automation processes</u>

Creating marketing automation processes

- 1. Open the Marketing automation application.
- 2. Click New process.
- 3. Choose a name for the new process and type it as the **Display name**.
- 4. Click Save.
 - The system creates the process and opens the **General** tab of its editing interface.
- 5. Under **Start the process**, choose one of the following process recurrence options:



Note: Process recurrence determines when the process is allowed to run for each <u>contact</u>.

- Always as a new instance the system can create and start new instances of the process at any time for the same contact.
- If it hasn't been run before the process can only run once for a given contact (i.e. starts only if it has never been run for the contact before).
- If the same process is not running concurrently the process starts only if there is no instance of the same process running for the contact at the same time.



Warning

If you select the **Always as a new instance** recurrence option, the system may run multiple unnecessary instances of the process concurrently (depending on the implementation of the process and its triggers). This can lead to increased system load and deliver the same marketing messages to the same contact multiple times.

6. Click Save.

Once you create a process, you can proceed to working with the process designer or create triggers.



Tip: You can change the recurrence settings of a process at any time by editing the process in the **Marketing automation** application.

Deleting marketing automation processes

You can delete a running marketing automation process if you want to stop processing its contacts.

- 1. Open the ${\bf Marketing\ automation}$ application.
- 2. Delete a process.
 - **Note** that the system stops processing all contacts that haven't made it to the finished step.

You have deleted a marketing automation process and stopped processing its contacts. You can always the restore the process on the **Objects** tab of the **Recycle bin** application. Keep in mind that restoring a marketing automation process doesn't restore its contacts.

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