You can manually start <u>marketing automation</u> processes for specific <u>contacts</u> or entire <u>contact groups</u>.



Tip: For full automation, define <u>triggers</u> for your processes. This allows the system to automatically run processes for contacts based on dynamic conditions.



Permission requirements

To manually run processes, you need to have the **Start process** <u>on-line marketing permission</u>.

Running processes for specific contacts

- 1. Open the **Contact management** application on the **Contacts** tab.
- 2. **Manage** () the contact for which you want to run the process.
- 3. Switch to the **Processes** tab.
 - Here you can see a list of all automation processes currently running for the contact.
- 4. Click Start new process.
- 5. Select the process that you want to start for the contact.

After starting the process, you can see its status in the list on the contact's **Processes** tab.

Running a process for a contact from within the process

You can also start a process for a single contact directly while editing the process:

- 1. Open the Marketing automation application.
- 2. **Edit** () the process you want to run for a contact.
- 3. Switch to the **Contacts** tab.
- 4. Click Start new process.
- 5. Choose the contact for which you want to run the process.

Running processes for contact groups

- 1. Open the **Contact groups** application.
- 2. **Edit** () a contact group.
- 3. Switch to the **Contacts** tab.
- 4. Choose the contacts in the group for which you want to run the process:
 - a. Selected contacts mark specific contacts using the checkboxes on the left side of the list
 - b. All contacts all contacts who belong to the contact group
- 5. Select the **Start new process** action.
- 6. Click OK.
- 7. Choose the automation process that you want to start.

A separate instance of the process starts for each of the specified contacts. The process may fail to start for some of the contacts, depending on the <u>recurrence settings</u> of the selected process.

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