

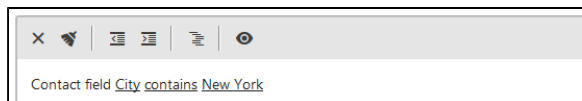
Now that you have created the trigger that automatically runs the process for certain contacts, use the process designer to define the flow of the process:

1. As *Travis*, open the **Marketing automation** application.
2. **Edit** (✎) the *Coffee Merchandise Lead Nurturing* process.
3. Switch to the **Steps** tab.
 - You can see the two default steps, **Start** and **Finish**, connected by a line.
4. Click the connection and press the Delete key to remove the connection.

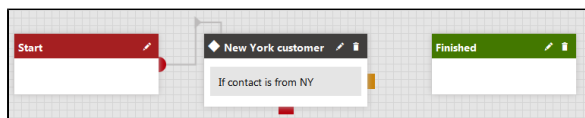
Adding a Condition step

The process starts only for contacts created with UK or USA as their country attribute. Let's assume you need to distinguish customers from New York City, so you can send them an email inviting them to your local cafes.

1. **Place** the **Condition** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** New York customer
 - **Designer label:** If contact is from NY
 - **Condition:** Add *Contact field contains value* condition. Specify the field to *City* and the value to *New York*.



4. **Connect** the **Start** step to the **New York customer** step.



Adding a Send transactional email step

You are now able to distinguish users that come from New York, so you can send them an email informing about the cafes you have set up in the area.

1. Place the **Send transactional email** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** New York cafe email
 - **From:** CoffeeCo@coffee.com (for example)
 - **To:** {% Contact.ContactEmail %}
 - **Based on:** HTML formatted text
 - **Subject:** Visit one of our Cafes!
 - **Body:** any text



The value you entered into the **To** field is a **macro expression** that dynamically loads the email address of the contact in the process.

General

Step type: Action

Display name: New York cafe email

Code name: SendTransactionalEmail ?

Action 'Send transactional email' parameters

From: CoffeeCo@coffee.com

To: [% Contact.ContactEmail #%]

Based on: ☐ Email template ☒ HTML formatted text

Subject: Visit one of our Cafes!

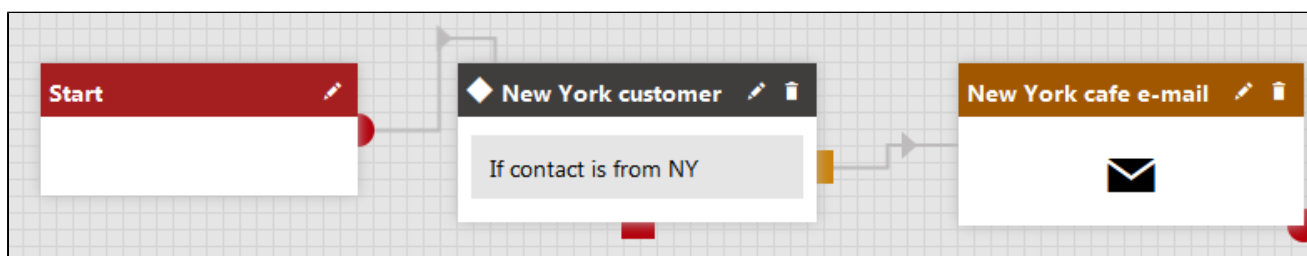
Body:

Source

Dear customer,

spending a day without coffee is like watching the Super Bowl and missing the commercials...

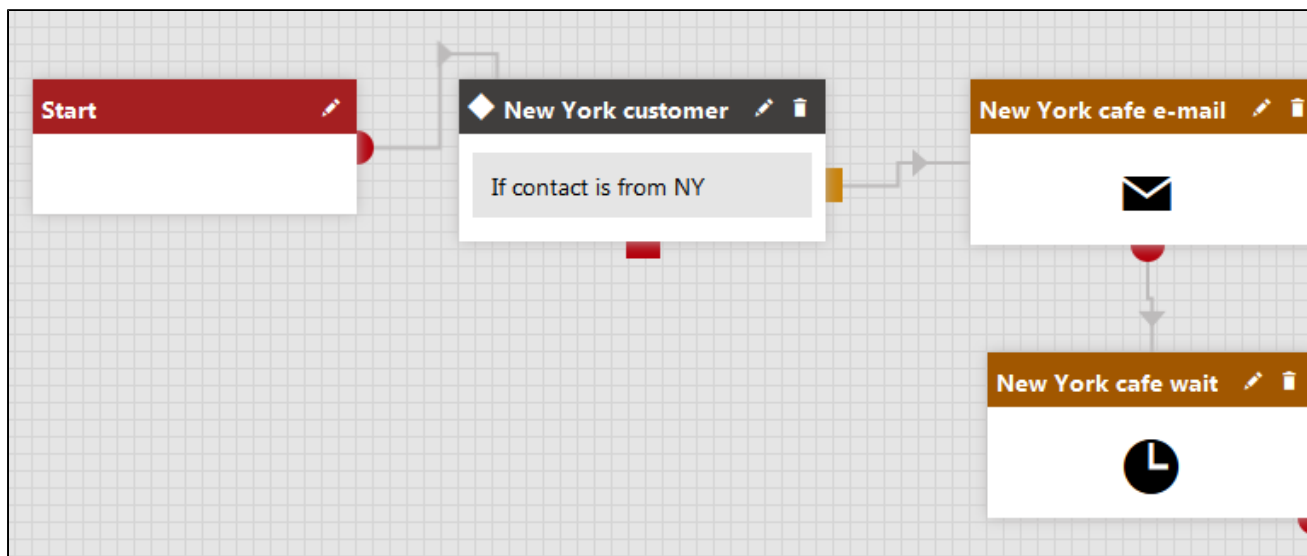
4. Click **Save** and **Close** the dialog.
5. Connect the IF source point of the **New York customer** step to the **New York cafe email** step.



Adding Wait step #1

Add a waiting interval to give contacts time to receive and read the email.

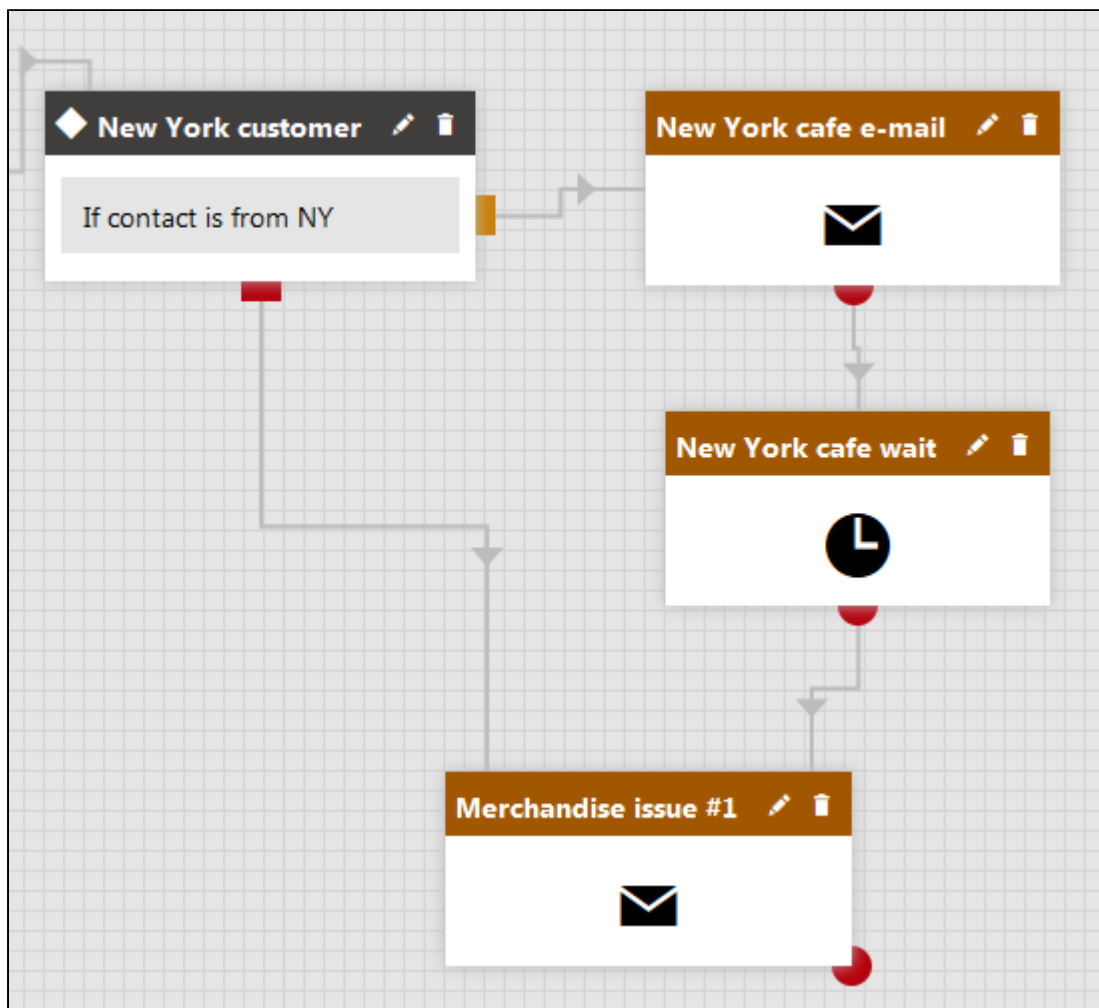
1. Place the **Wait** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** New York cafe wait
 - **Timeout settings:** Select **Specific interval** and enter **7 days**. You can set a shorter interval such as **3 minutes** for testing purposes.
4. Click **Save** and **Close** the dialog.
5. Connect the **New York cafe email** step to the **New York cafe wait** step.



Adding Send marketing email step #1

Now add a step that sends the first marketing email that you created earlier to both the contacts that are and aren't from New York:

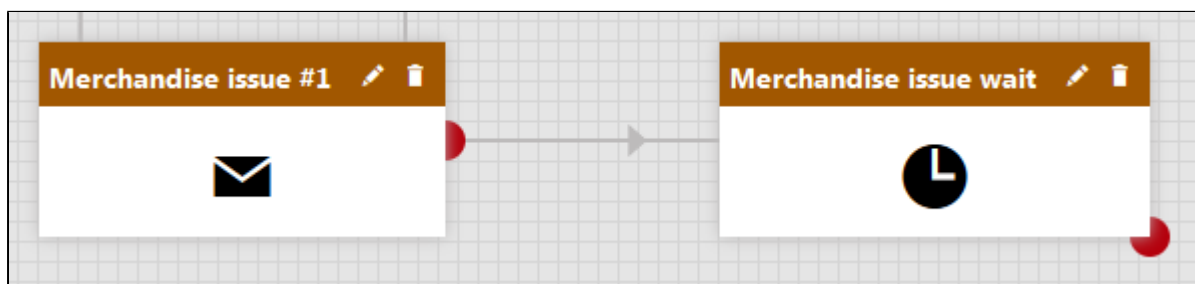
1. Place the **Send marketing email** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** Merchandise issue #1
 - **Site:** choose the correct site, *Coffee and Co Merchandise Newsletter*
 - **Email:** choose the correct email, *Coffee Co Merchandise #1*
4. Click **Save** and **Close** the dialog.
5. Connect the ELSE source point (red) of the **New York customer** step to the **Merchandise issue #1** step.
6. Connect the **New York cafe wait** step to the **Merchandise issue #1** step.



Adding Wait step #2

Add another **Wait** step into the process to give contacts time to receive the issue:

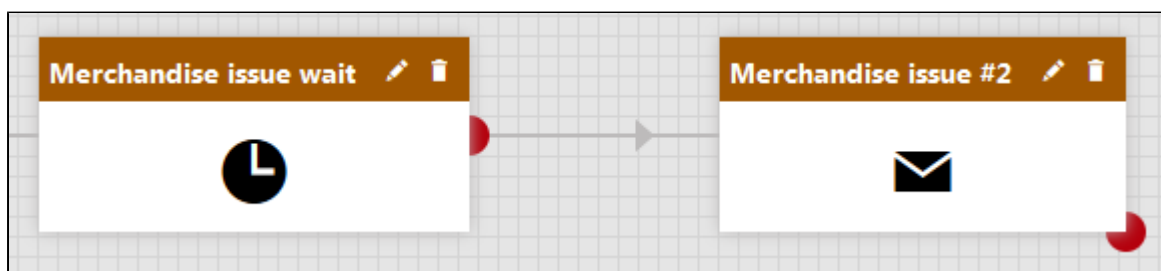
1. Place the **Wait** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** Merchandise issue wait
 - **Timeout settings:** Select **Specific interval** and enter **3 days**. You can set a shorter interval for testing purposes (e.g. 3 minutes).
4. Click **Save** and **Close** the dialog.
5. Connect the **Merchandise issue #1** step to the **Merchandise issue wait** step.



Adding Send marketing email step #2

Add a step that sends the second marketing email from the newsletter that you created earlier:

1. Place the **Send marketing email** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** Merchandise issue #2
 - **Site:** choose the correct site, *Coffee and Co Merchandise Newsletter*
 - **Email:** choose the correct email, *Coffee Co Merchandise #2*
4. Click **Save** and **Close** the dialog.
5. Connect the **Merchandise issue wait** step to the **Merchandise issue #2** step.



Adding Wait step #3

Add another **Wait** step into the process to give contacts time to receive the second email:

1. Place the **Wait** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** Merchandise issue wait 2
 - **Timeout settings:** Select **Specific interval** and enter **3 days**. You can set a shorter interval for testing purposes (e.g. **3 minutes**).
4. Click **Save** and **Close** the dialog.
5. Connect the **Merchandise issue #2** step to the **Merchandise issue wait 2** step.

Adding a Multi-choice step

Add a **Multi-choice step** to decide where the process moves next based on whether the contact clicked on the links in the previous email:

1. Place the **Multi-choice** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** Newsletter link decision
 - **User action text:** Choose the next step
 - **User action tooltip:** *Choose whether you want to subscribe the contact to the Coffee Co monthly newsletter or set the contact's status to Prospective client.*
4. Click **Save**.

Modifying the first case

1. Switch to the **Cases** tab.
2. **Edit** (🔍) Case 1 and modify the values as follows:
 - **Designer label:** Subscribe to monthly newsletter

- **User action tooltip:** *Subscribe the contact to the Coffee Co monthly newsletter*
3. Click **Edit** next to the **Condition** field.
 4. Add the *Contact has clicked a link in marketing email* rule. Specify the *Coffee Co Merchandise #1 issue* under the *Coffee Co Merchandise Newsletter*.
 5. Confirm by clicking **Save & Close** and close the dialog.
 6. **Save** the changes for the case.

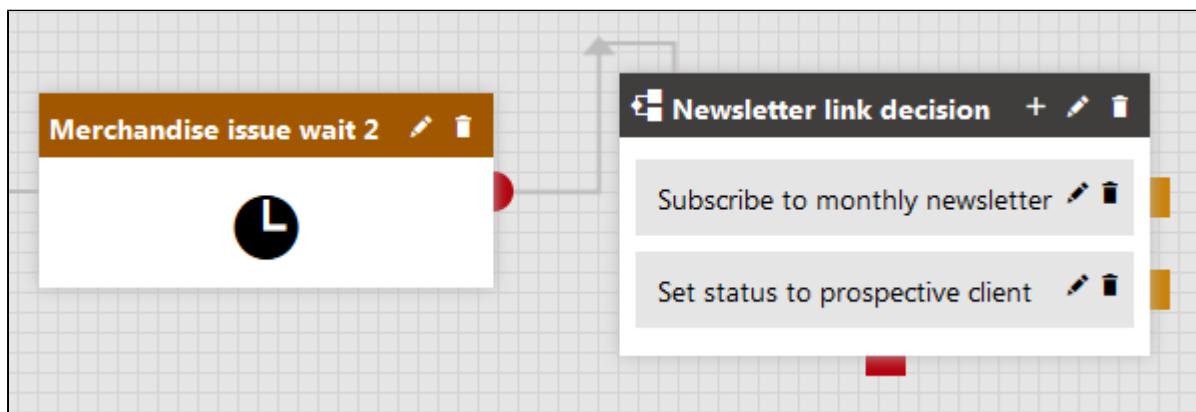
Modifying the second case

1. **Edit** (✎) Case 2 and modify the values as follows:
 - **Designer label:** Set status to prospective client
 - **User action tooltip:** Set the contact's status to *Prospective client*
2. Click **Edit** next to the **Condition** field.
3. Add the *Contact has clicked a link in marketing email* rule. Specify the *Coffee Co Merchandise #2 issue* under *Coffee Co Merchandise Newsletter*.
4. Confirm by clicking **Save & Close** and **OK**.
5. **Save** the changes for the case.

Configuring security for the Multi-choice step

1. Switch to the **Security** tab.
2. Under *Roles which can move object to different step*, select **Only listed** and your website in the **Select site** drop-down list.
3. Click on **Add roles** and select the **Process administrator** role.
4. Click **Save** and **Close**.
5. Connect the **Merchandise issue wait 2** step to the **Newsletter link decision** step.

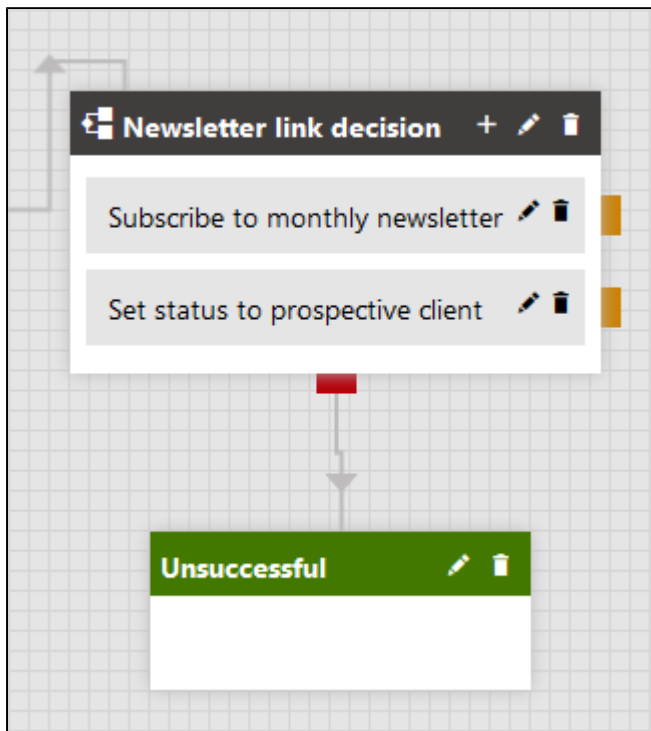
The [multi-choice step](#) automatically decides how the process continues. Users in the **Process administrator** role can decide how the process continues for contacts that satisfy both conditions (by clicking on both newsletter links). You can modify security for each case separately, but by default both cases inherit the settings of the main step.



Adding an alternative Finished step

Add a Finished step that concludes the marketing process for contacts who don't click any of the newsletter links:

1. Place the **Finished** step onto the grid.
2. Double-click the step's name in the header.
3. Rename the step to **Unsuccessful** and press **Enter**.
4. Connect the ELSE source point (red) of the **Newsletter link decision** step to the **Unsuccessful** step.



Adding a Newsletter subscription step

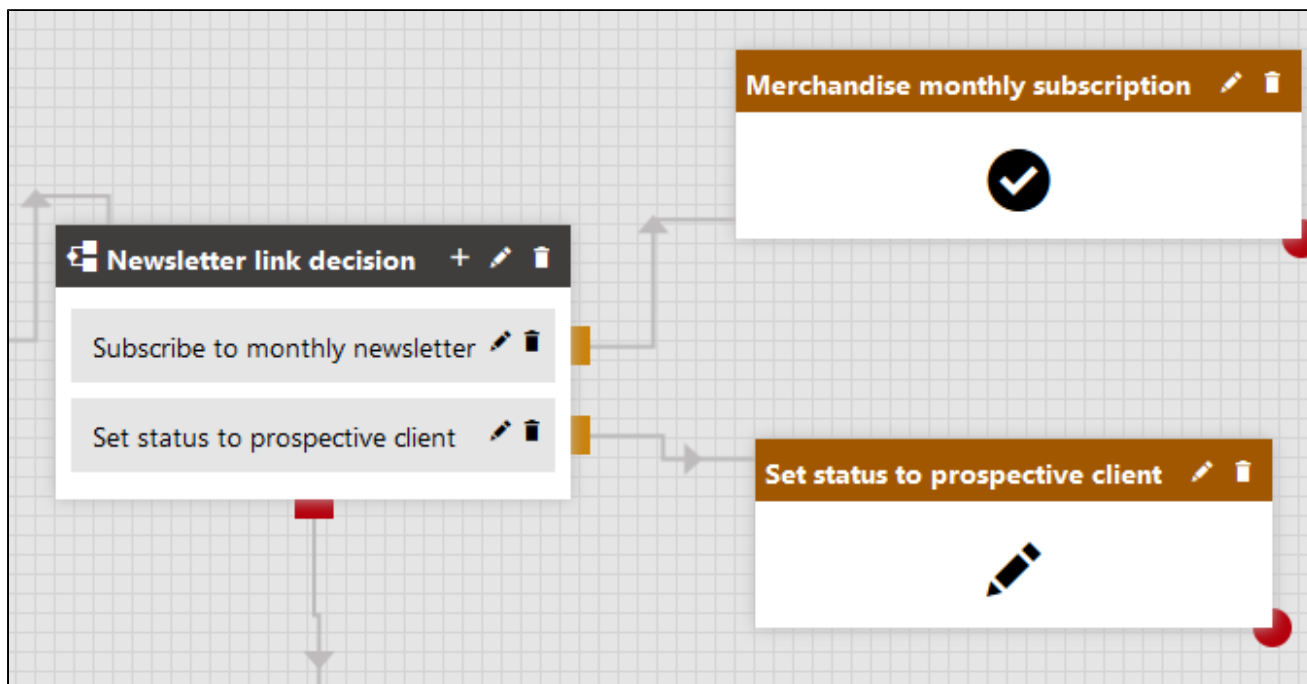
Add a step that subscribes the contact to the *Coffee Co monthly newsletter* email feed:

1. Place the **Newsletter subscription** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** Merchandise monthly subscription
 - **Newsletter:** Select the *Coffee Co monthly newsletter*
 - **Action:** Subscribe to newsletter
4. Click **Save** and **Close** the dialog.
5. Connect the first source point of the **Newsletter link decision** step to the **Merchandise monthly subscription** step.

Adding a Set contact status step

Add a step that sets the contact's status to *Prospective client*:

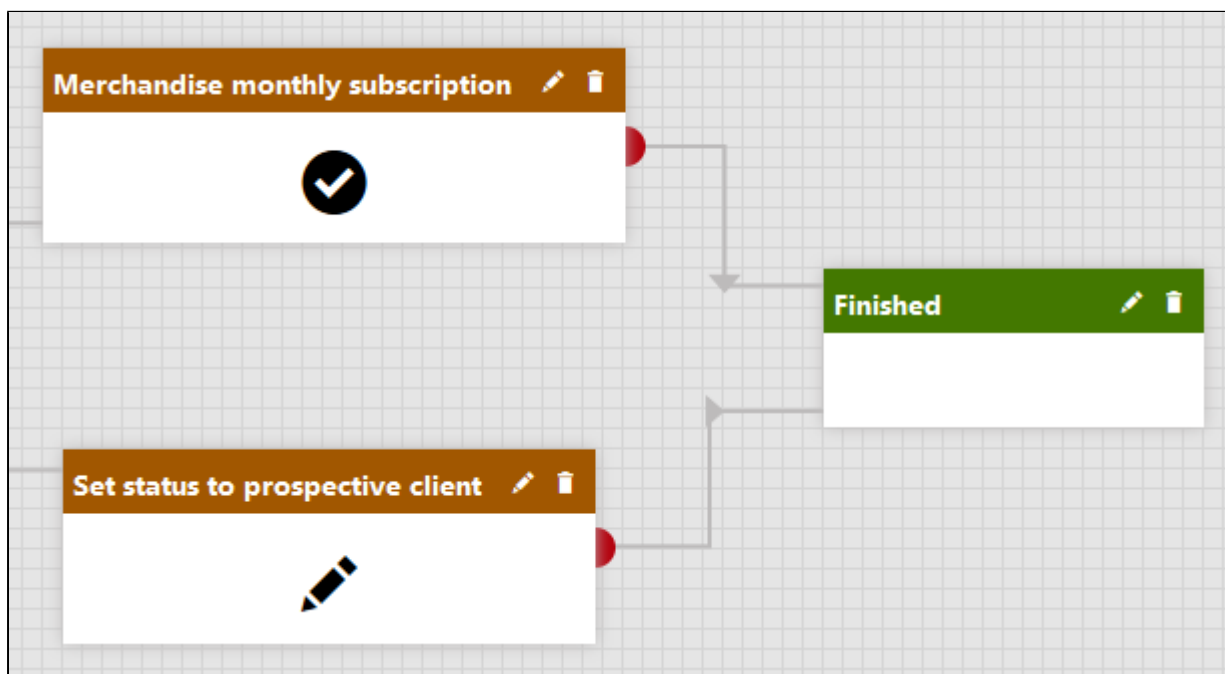
1. Place the **Set contact status** step onto the grid.
2. Edit the step by clicking the pencil icon next to its name.
3. Modify the values as follows:
 - **Display name:** Set status to prospective client
 - **Contact status:** Select *Prospective client* status
4. Click **Save** and **Close**.
5. Connect the second source point of the **Newsletter link decision** step to the **Set status to prospective client** step.



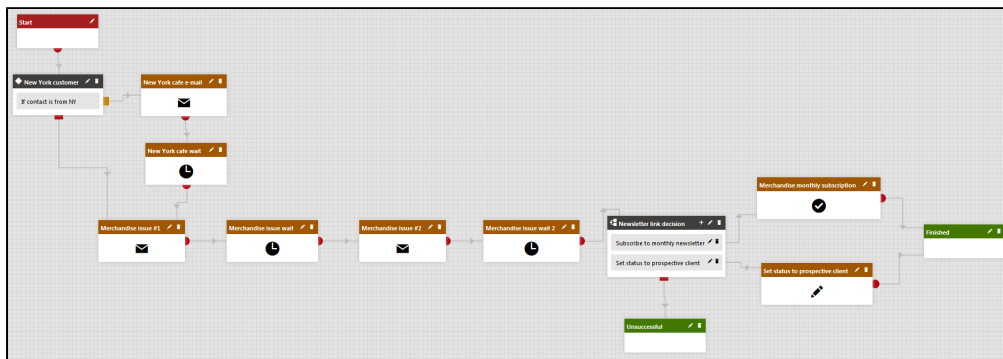
Finishing the process design

You have now finished creating all the necessary steps. You only need to connect the last two steps to the original **Finished** step.

1. Connect the first source point of the **Merchandise monthly subscription** step to the **Finished** step.
2. Connect the first source point of the **Set status to prospective client** step to the **Finished** step.



The design of the process is now complete.



Now that you have finished this part of the walkthrough and created a whole marketing automation process, you can [see the process in action](#).

Next page: [Managing the process](#)