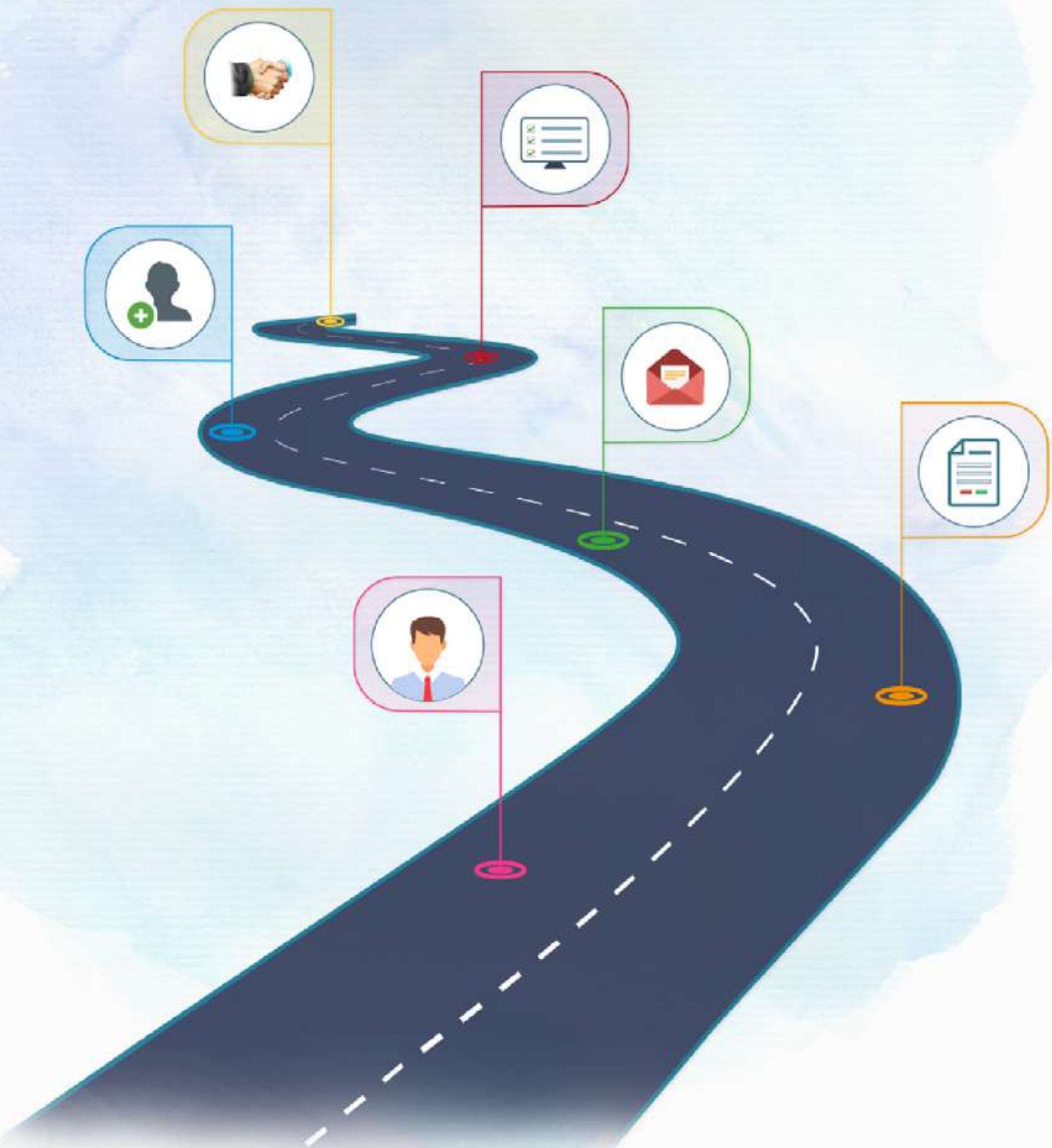
ZOHO MarketingHub

UNDERSTANDING JOURNEYS



UNDERSTANDING JOURNEYS

A User Guide

Build highly sophisticated journeys for leads, automate repetitive tasks, and engage based on lead behavior. Set up a journey in accordance with your marketing strategy and the rest is taken care of.

In this guide we'll walk you through various types of journeys, creating a successful journey, and analyzing the reports.

Journeys let you segment your leads based on their activities and initiate a series of messages and actions for them. Create an action flow and have them be completely automated. Every journey has three major sections.

Table of Contents

Table of Contents - II

Trigger

Under this section, you'll define the condition for your leads to enter the journey.

Consider the following examples:

Update field trigger

A journey with this trigger initiates whenever there is an update in the field you select.

Form submission trigger

A journey with this trigger initiates whenever there is a sign up via the form you select.

Process

Under this section, you'll define a series of actions to be performed on your leads. You can create an email series, define actions, split the path based on conditions, and much more.

End-of-journey actions

Under this section, you'll define a series of actions that will be performed when the lead completes/exits the process.

Once you are finished, activate the journey. Journeys will show you up-to-date reports, which you can use to analyze how well your strategy is performing with your leads.

Types of journeys

Journeys are classified under two major categories:

Pre-designed journeys

These types of journeys have the trigger type already defined. There are eight pre-designed journey templates.

Blank journeys

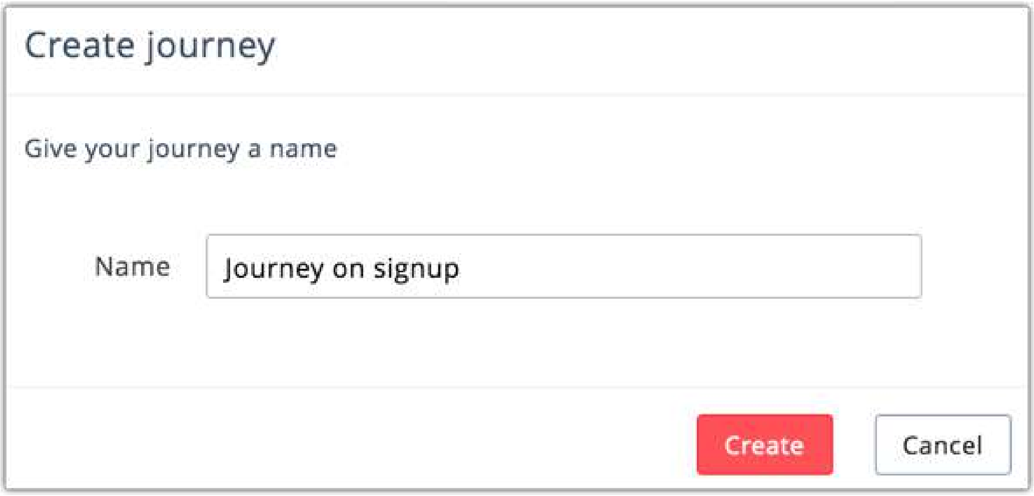
Define a trigger type, and configure the process elements and end-of-journey actions to suit your requirements.

Blank journey template

Define a trigger type, configure the process elements, and the end-of-journey actions the way you want.

Create a blank journey

1. From the *Navigation* toolbar, select **Journeys** and choose **All journeys**.
2. Click **Create journey** in the top-right corner.
3. Select **Blank**.
4. Give your journey a name for future reference and click **Create**.



Configure trigger

After creating the journey, you will be taken into the journey canvas. First, you will have to configure a trigger. Listed below are the various triggers:

- **Form submission** trigger: The journey will trigger for sign-ups through the form you select. Drag the trigger component into the canvas and click **Select form**. Select the intended signup form. It can be a regular form or a pop-up form.
- **List entry** trigger: The journey will trigger for leads entering the mailing list you select. Drag the trigger component into the canvas and click **Select list**. Select the intended mailing list.
- **Open** trigger: The journey will be open to leads moved in here by other entities (e.g., other journeys). Drag the trigger component into the canvas and click **Configure**. You can add leads into journey using an API request.

- **Field update** trigger: The journey will trigger when the field you select is updated. Drag the trigger component into the canvas and click **Select field**. Select the intended field.

- **Lead stage movements** trigger: The journey will trigger when a lead reaches the stage you specify. Drag the trigger component into the canvas and click **Select stage**. Select a lead stage from the dropdown box.

- **Lead score updates** trigger: The journey will trigger when a lead meets the scoring criteria you specify. Drag the trigger component into the canvas and click **Select score**. Provide the score criteria that you want your leads to meet.

- **Page visit** trigger: The journey will trigger when your leads visit your webpage. Drag the trigger component into the canvas and click **Select page**. Select the intended page from the dropdown box.

Note: You should have added your domain with web assistant and embedded the tracking code in your pages to be listed under this trigger.

- **Goal achievement** trigger: The journey will trigger on a goal achievement defined under web assistant. Drag the trigger component into the canvas and click **Select goal**. Select the intended goal from the dropdown box.

- **Email action** trigger: The journey will trigger for leads who received, opened, or clicked the selected campaign, based on the condition you set. Drag the trigger component into the canvas and click **Select email**. Select the intended campaign.

- **Date field** trigger: The journey will trigger based on the date in the selected date-field. Drag the trigger component into the canvas and click **Select field**. Select the intended mailing list and date field.

- **Video click** trigger: The journey will trigger when your recipients click to view a video you attach as tags in your email campaign. Drag the trigger component into the canvas and click **Select video**. Select the intended video tag from the dropdown box.

- **Attachment download** trigger: This journey will trigger when your recipients download attachments you attach with your email campaign. Drag the trigger component into the canvas and click **Select file**. Select the intended file from the dropdown box.

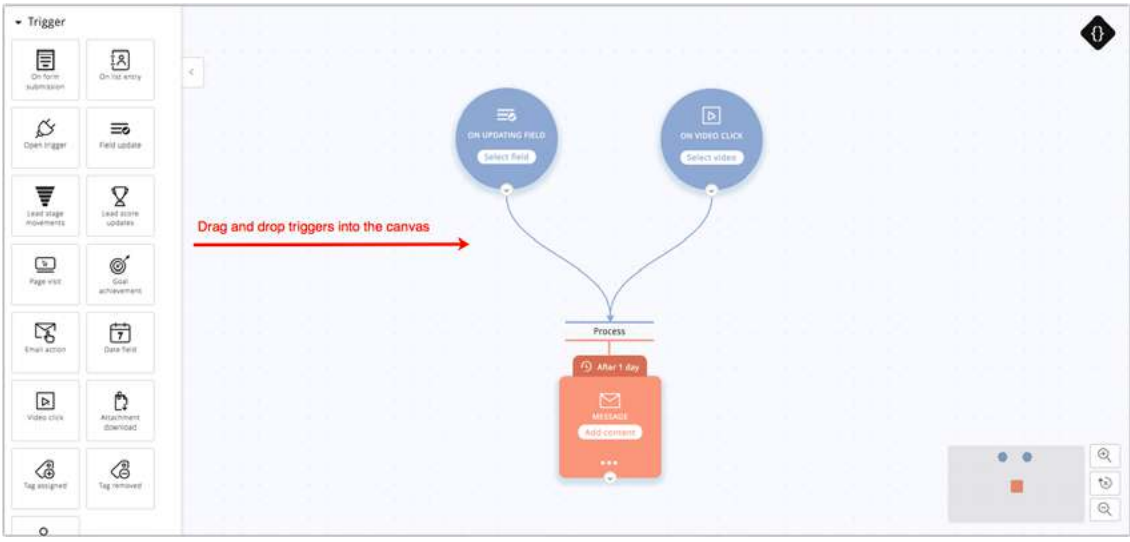
- **Tag assigned** trigger: The journey will trigger when the tag you select is assigned to leads. Drag the trigger component into the canvas and click **Select tag**. Select the intended tag.

- **Tag removed** trigger: The journey will trigger when the tag you select is removed from leads. Drag the trigger component into the canvas and click **Select tag**. Select the intended tag.

- **Unsubscribes** trigger: The journey will trigger for those who unsubscribe from the list you select. Drag the trigger component into the canvas and click **Select list**. Select the intended mailing list.

- **Missed goal** trigger - Click **missed goal** from the trigger block. Select a domain for which you've set up goal. The journey will trigger for those who've missed the goal.

- **Abandoned cart**-trigger - Click **abandoned cart** from the trigger block. Select your store from Zoho Commerce. The journey will trigger for those who abandoned the cart.



Set up process

Build a complete journey for your leads under the process section; create email series, define actions, and set rules to separate paths based on leads' behavior and information.

The following is a list of all that you can do under the process section:

- Send email

  Send an email to your leads when they reach this stage of the journey.

  To configure:

  1. Drag and drop **Send email** component from the Process section of the left panel into the canvas.
  2. Click **Configure** in the message block.
  3. Add the message's basic info and content.
  4. Click **Send for review** to send your message to our compliance team for review.

  Your reviewed message will be sent out as per schedule once you activate the journey. Messages, by default, will be sent one day after the previous action was performed. However, you can edit the message's schedule.

- Send survey email

  Send survey emails to your leads when they reach this stage of the journey. You should integrate with Zoho Survey to send survey emails.

  1. Drag and drop **Send survey** email component from the *Process* section of the left panel into the canvas.
  2. Click **Configure** in the message block.
  3. Add the message's basic info and content. Make sure to add the survey merge tag in the content. Learn about survey email.

4. Click Send for review to send your message to our compliance team for review.

Your reviewed message will be sent out as per schedule once you activate the journey. Messages, by default, will be sent one day after the previous action was performed. However, you can edit the message's schedule.

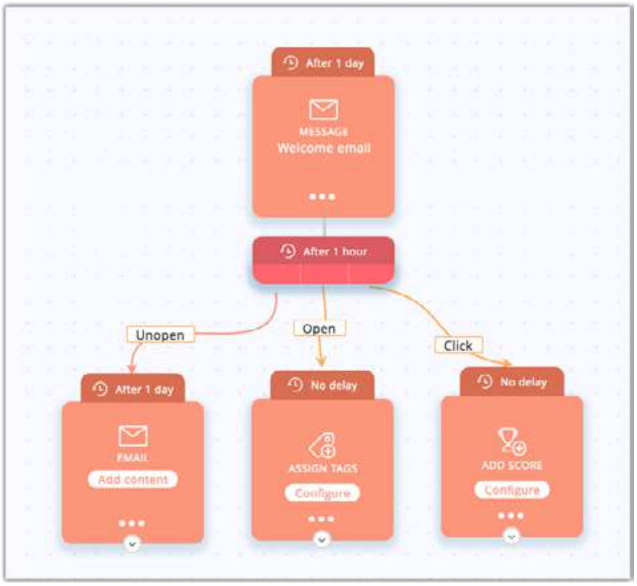
Creating paths based on email response

You can create separate paths for email opens, unopens, any link clicks and specific link clicks.

To set response:

1. Click the **More** icon in the message action block.
2. Select the responses for which you want to create separate paths. (You can select the "Specific link clicked" response only if there are links in the email content.)
3. Click **Done**.

   Create action flows for each response.



Associating topics with journeys

If you are selecting Send email as a process action, you need to associate a topic with the journey. When leads unsubscribe through the email sent via this journey, they can choose to unsubscribe from the selected topic or from the entire organization.

- Send SMS

  Send SMS messages to your leads when they reach this stage of the journey.

1. Drag and drop **Send SMS** component from the *Process* section of the left panel into the canvas.
2. Click **Configure** in the message block.
3. Add the message's basic info and content.
4. Click **Send for review** to send your message to our compliance team for review.

Your reviewed message will be sent out as per schedule once you activate the journey. Messages, by default, will be sent one day after the previous action was performed. However, you can edit the message's schedule.

- Set reminders

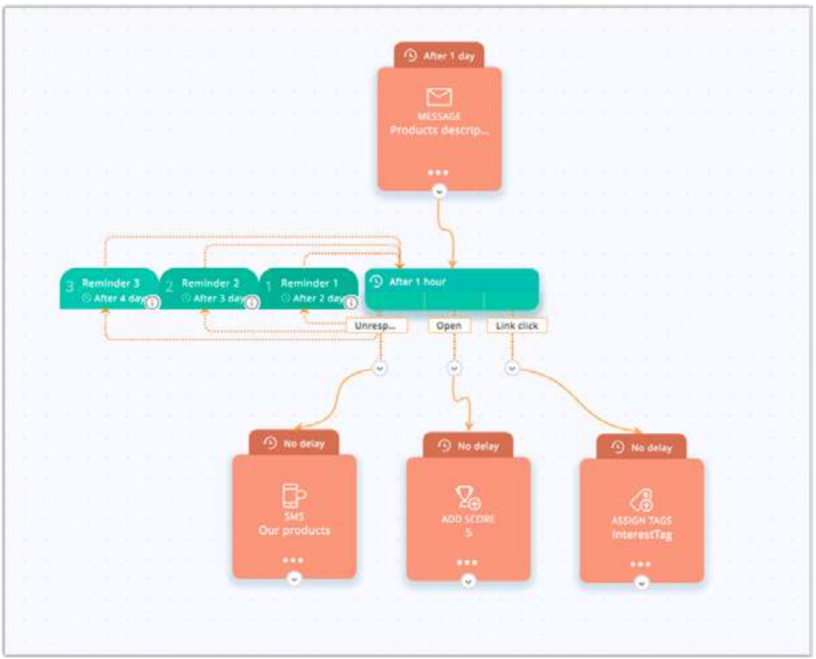
  Send your leads reminders when they do not respond to your emails. Following are the different types of reminders:

  - **To open** : When leads who do not open your email
  - **To click** : When leads do not click any links in the email

- **To click specific link** : When leads do not click a specific link in the email
- **To complete survey** : When leads don't complete a survey
- **Custom** : Create your own condition

Click **Reminder loops** component from the Process section of the left panel and drag and drop the desired loop into the canvas. You will then need to do the following:

1. Connect this component to an email. However, you can only connect the survey reminders to a survey email.
2. Create the reminder emails and set the time period between each email. You can create a maximum of three emails.
3. Define a path for those who match the reminder criteria. As soon as leads match the criteria, they will take this path.
4. Define a path for those who do not match the reminder criteria. Leads who do not match the criteria in spite of your reminder emails will take this path.



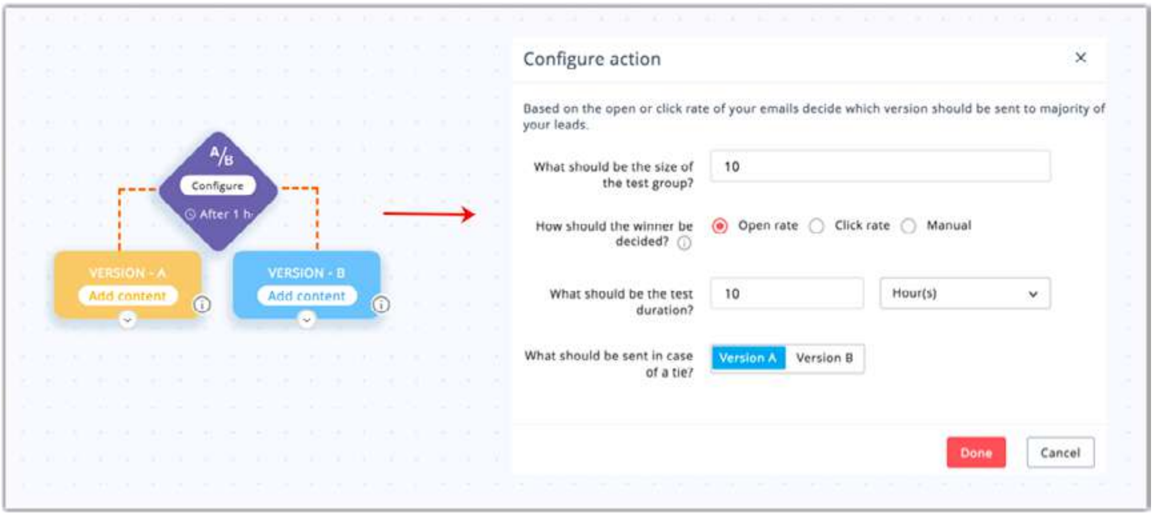
- AB test

  With this component you can AB test two versions of your campaign. Send these two versions to a small group of your leads and decide the winner based on their performance. Once the winning version is decided, it will be sent to the remaining leads.

  Drag and drop the **AB test** component from the process section of the left panel into canvas. Click **Configure** in the action block. Fill in the following information:

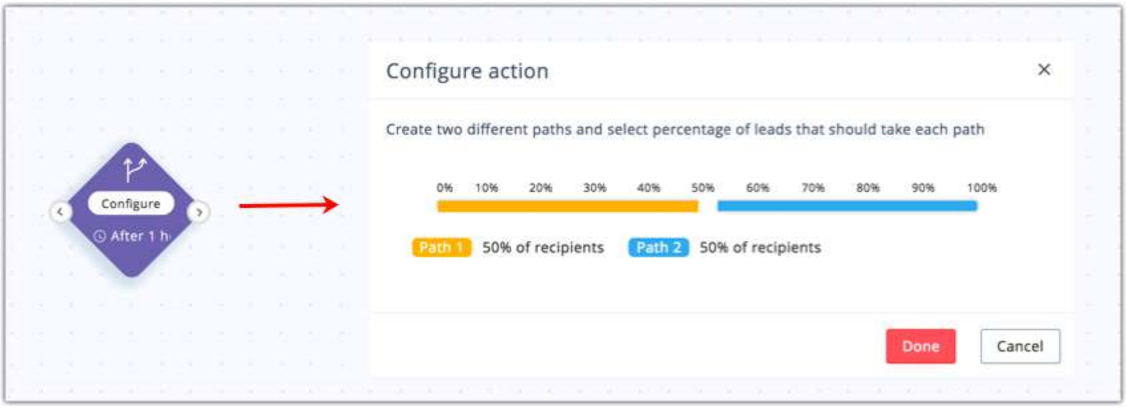
  - **Size of the test group** : Enter the number of leads who should receive these test versions. 50% of the selected number will receive version A and the remaining 50% will receive version B.
  - Select **how the winner should be decided**. You can choose to decide based on open rate or click rate, or decide the winner manually once the test is complete, based on their reports.
  - Select **which version should be sent in case of uncertainty**. The following are the cases of uncertainty:
    - When there is a tie after the test
    - When a lead reaches this stage after the versions have been sent to the test group and while the test is still running

After the test is complete the winning version will be decided. Leads who enter after the selected test duration will take the path that follows the winning version.



- Random split

  Split the path of the journey randomly to two group of leads. Drag and drop the Random split component into the canvas. Click Configure and select the percentage for each group. When leads reach this stage, they will be randomly put into each path.



- Set conditions

  Set conditions based on lead information and behavior and branch out the path. When leads reach this stage in the process they will be checked for whether they meet the criteria or not, and will take the corresponding path.

There are three types of conditions:

- Simple criteria

  Set up a criteria based on either lead information or recipient activity. Split the journey here for leads who satisfy the criteria and for those who don't.

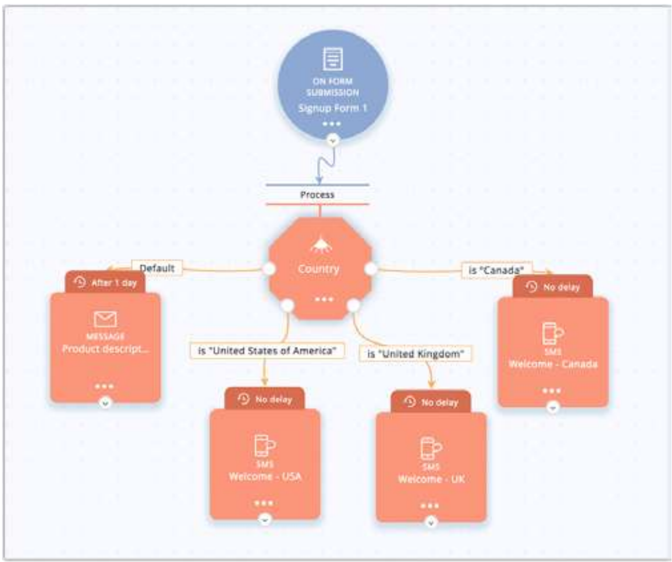
- Three way

  Segment your leads based on their field value and create separate paths for each segment. You need to provide two different values for the field you select. You will create two paths for these two values and a third path where both these conditions are false.

- Multi way

  Segment your leads based on their field value and create separate paths for each segment. You can provide a maximum of six values for the field you select. You will create as many paths for as many values you provide, and another path where all these conditions are false.

Click the **Condition** component from the *Process* section of the left panel and drag and drop the desired condition into the canvas and configure it to suit your requirements.



- Merge

  Use this component if you need to merge two or more paths into one.

  Drag and drop the **Merge** component from the *Process* section of the left panel into the canvas and make the connections as required.

Note: *You cannot connect the end node of the merge component with an end-of-journey action.*

- Assign tags

  Assign tags to leads when they reach this stage of the journey.

  Drag and drop the **Assign tags** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block and select your intended tag from the list.

- Remove tags

  Remove tags from leads when they reach this stage of the journey.

  Drag and drop the **Remove tags** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block and select your intended tag from the list.

- Add to list

  Add leads to a list when they reach this stage of the journey.

  Drag and drop the **Add to list** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block and select your intended mailing list.

- Remove from list

  Remove leads from a list when they reach this stage of the journey.

  Drag and drop the **Remove from list** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block and select your intended mailing list.

- Add lead score

  Add score to your leads when they reach this stage of the journey.

  Drag and drop the **Add score** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block and select the score to be added.

- Subtract lead score

  Subtract score from your leads when they reach this stage of the journey.

  Drag and drop the **Subtract score** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block and select the score to be subtracted.

- Update field

  Update the value of your leads' field when they reach this stage of the journey.

  Drag and drop the **Update field** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block and select the intended field and the value to be updated.

- Push to Zoho CRM

  Push your leads' data into Zoho CRM when they reach this stage of the journey.

  Drag and drop the **Push to Zoho CRM** component from the *Process* section of the left panel into the canvas. Click **Configure** in the action block.

  - Select from the following two options: you can either push the Zoho MarketingHub-related information of all leads to Zoho CRM (new records will be created for leads new to Zoho CRM) or update just the data of leads already existing in Zoho CRM (new records will not be created for leads new to Zoho CRM).
  - Select the Zoho CRM module that you want to push your leads into.
  - Map Zoho MarketingHub fields with the respective Zoho CRM field.

  Click Save.

- Create task in Zoho CRM

  Create tasks in Zoho CRM for leads who've reached this stage.

  To create tasks:

1. Drag and drop the **Create task in Zoho CRM** component from the *Process* section of the left panel into the canvas.
2. Click **Configure** in the action block.

3. Select from the following two options: you can either create tasks for all leads entering this component (new records will be created for leads new to Zoho CRM) or create only for leads already existing in Zoho CRM (new records will not be created for leads new to Zoho CRM).

4. Click **Map fields** and map Zoho MarketingHub fields with Zoho CRM fields.

5. Click **Create task**.

6. Fill in the following information:

    - **Subject** - Enter your task subject.
    - **Status** - Select the status you want to give your task.
    - **Priority** - Select the priority of the task.
    - **Owner allocation** - Allot owner for tasks being created in CRM. You can select from the following options:
        - Assign all tasks to one owner
        - Select owner by round robin method for each task

7. Click **Save**.

- **Create deal in Zoho CRM**

  Create deals in Zoho CRM for leads who've reached this stage.

  To create deals:

1. Drag and drop the **Create deal in Zoho CRM** component from the *Process* section of the left panel into the canvas.
2. Click **Configure** in the action block.
3. Select your CRM account.
4. Click **Create deal**.
5. Fill in the following information:
    - **Deal name** - Enter a name for your deal.
    - **Date model** - Choose between static and dynamic date models.
    - **Stage** - Select a deal stage.
    - **Owner allocation** - Allot owner for deals being created in CRM. You can select from the following options:
        - Assign to the lead's owner (owner in CRM)
        - Assign all tasks to one owner
        - Select owner by round robin method for each task
6. Click **Save**.

- Milestone

  Set the milestone of your journey with this component. You can view the leads reaching these milestones and analyze the performance of the journey.

  Drag and drop the **Milestone** component into the canvas and make the intended connections.

- Send internal notification-process

  Set up emails to notify your organization members when leads pass a particular stage in the journey. Drag and drop the Internal **notification email** component from the *Process* section of the left panel into the canvas. Add subject, email content and select email addresses.
- Webhook

  Select a lead webhook which you would like to update when leads enter this stage. Drag and drop the Internal **Wehook** component from the *Process* section of the left panel into the canvas. Select the webhook.

- Lead stage

  Select a lead stage to which the leads should be moved. Drag and drop the Internal **Lead stage** component from the *Process* section of the left panel into the canvas. Leads will remain in the selected stage

- Move to end-of-journey

  Remove leads from the process and move them to end-of-journey when they reach this stage of the journey.

  Drag and drop the **Move to end-of-journey** component from the

- Move to another journey

  Move leads to another journey when they reach this stage of the journey.

  Drag and drop the Move to another journey component from the Process section of the left panel into the canvas, and select the destination journey.

The destination journey should be a journey with an open trigger. An open trigger is not based on any criteria. The journey with an open trigger will be open to leads pushed to it by other entities (e.g., other journey, workflows).

- Exit from journey

  Remove leads from the journey when they reach this stage of the journey.

  Drag and drop the **Exit from journey** component from the *Process* section of the left panel into the canvas.

After configuring the actions to be performed under process, connect the actions in your desired sequence and set the delay between them.

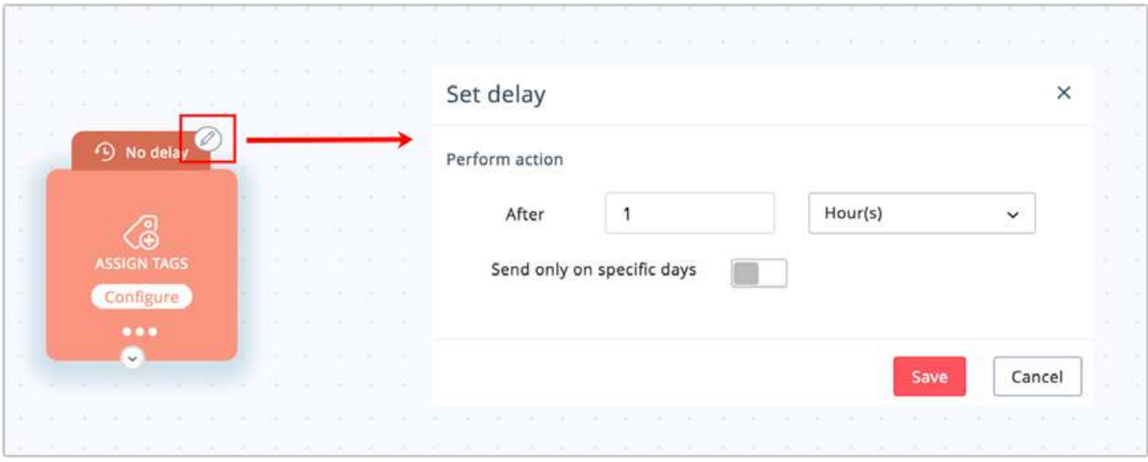
Set delay between process components

The default delay is one day for sending a message and one hour for other actions. However, you can edit the delay to suit your requirements. Mouse over the delay section above the component and click the Edit icon to change the delay. The delay for the first component is based on the trigger. The delay for the other components is based on the previous component.

Note:

- The minimum delay between any two messages is one hour

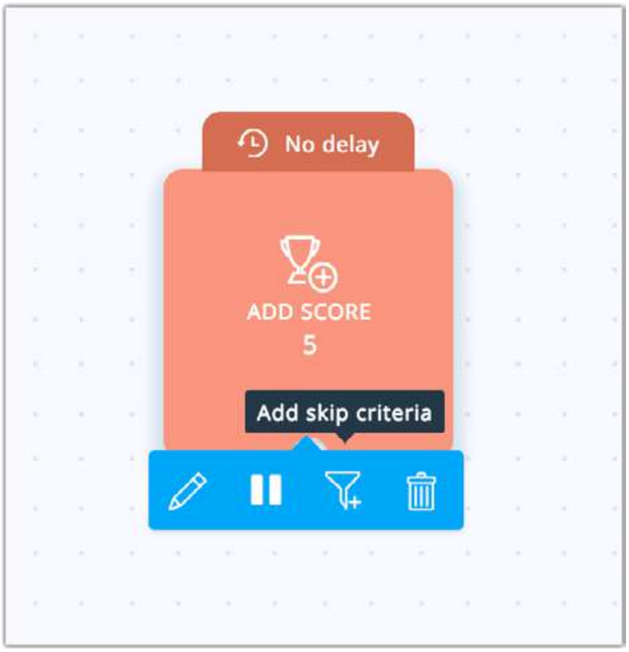
- You cannot set delay for a condition



Configure component skip criteria

Decide who the process actions should or should not be performed for by setting up a criteria based on lead information or recipient activity. The lead that meets the criteria will skip that component and proceed to the next component.

To configure component skip criteria, click the **More** icon in the component, select the **Skip criteria** option, and set the criteria that fits your requirements.



Define end-of-journey actions

End-of-journey actions are performed once the lead has exited the process.

Drag and drop action components from the *End-of-journey action* section of the left panel into the journey canvas and configure them. Listed below are the actions that can be performed:

- Assign tag
- Remove tag
- Add to another list
- Remove from list
- Add lead score
- Subtract lead score
- Update field
- Push to Zoho CRM
- Move to another journey

After configuring the actions to be performed after process, connect them with each others in your desired sequence and set the delay between them. Note that having end-of-journey actions is not mandatory.

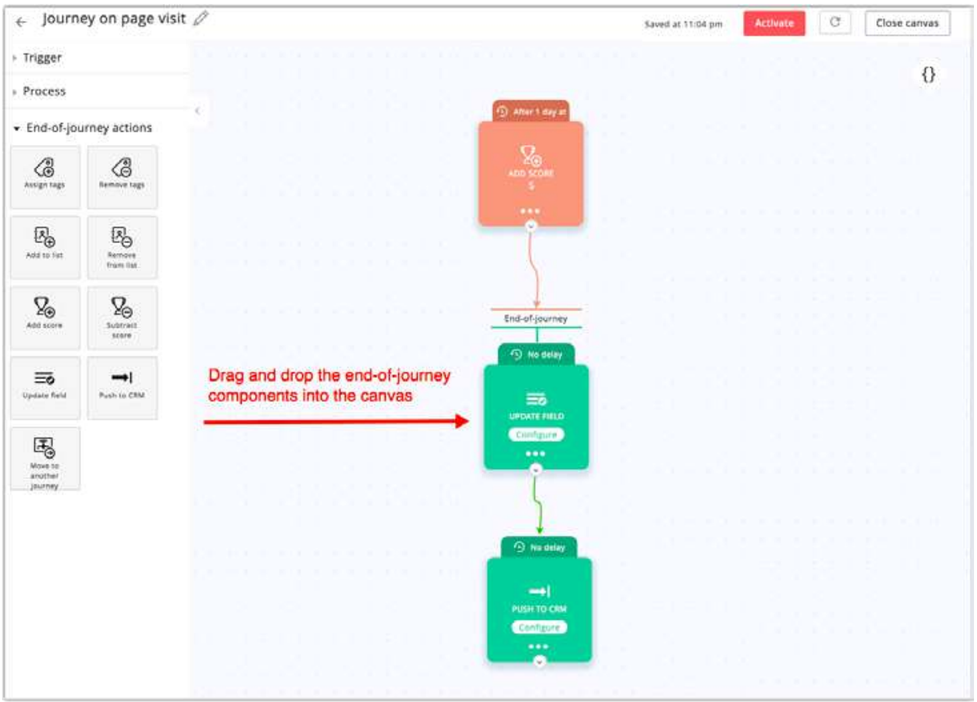
Set delay between end-of-journey components

The default delay between the actions is one hour. However, you can edit the delay to suit your requirements. Mouse over the delay section above the actions and click the Edit icon to change the delay. The delay for the first action is based on the time the lead exits the process. The delay for the other actions is based on the previous action.

Configure action skip criteria

Decide who the actions should or should not be performed on by setting up a criteria based on lead information or recipient activity. The leads that meet the criteria will skip that action and proceed to the next action.

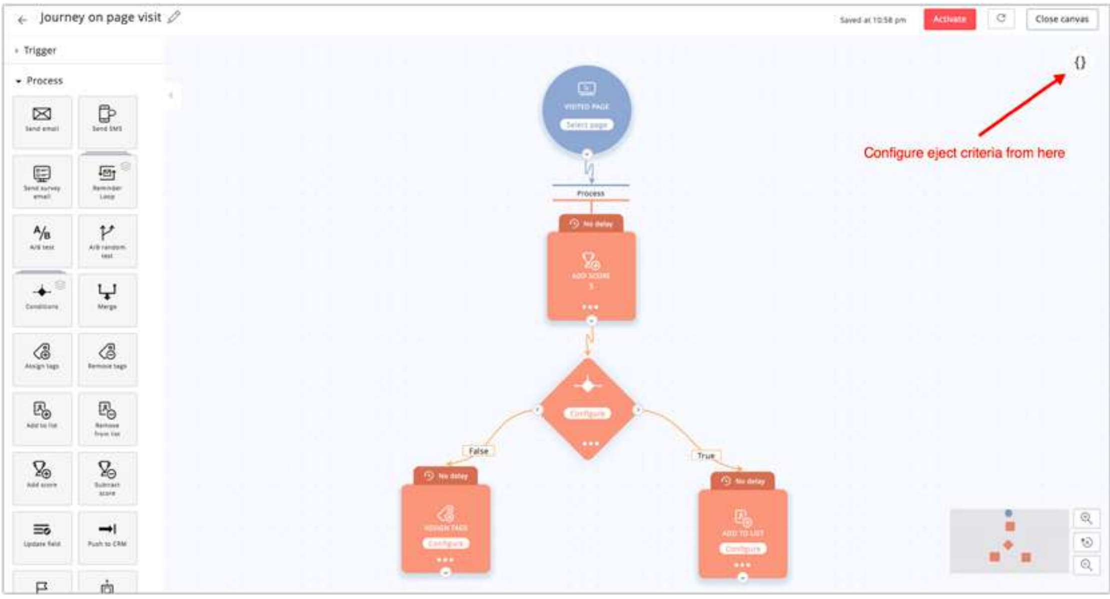
To configure action skip criteria, click the **More** icon in the action block, select the **Skip Criteria** option, and set the criteria that fits your requirements.



Configure eject criteria

Set up criteria based on lead information or recipient activity to remove leads from the journey or process.

Find the **Eject criteria** icon in the top-right corner. Set the criteria that fits your requirements and choose whether the lead meeting the criteria should be ejected from the process or the journey.



Activate the journey

After you've built up your journey you need to activate it. Find the Activate button in the top-right corner. Once activated, your journey is all set.

Before activating a journey:

- Trigger and all components in the canvas should be configured
- All components in the canvas should be connected

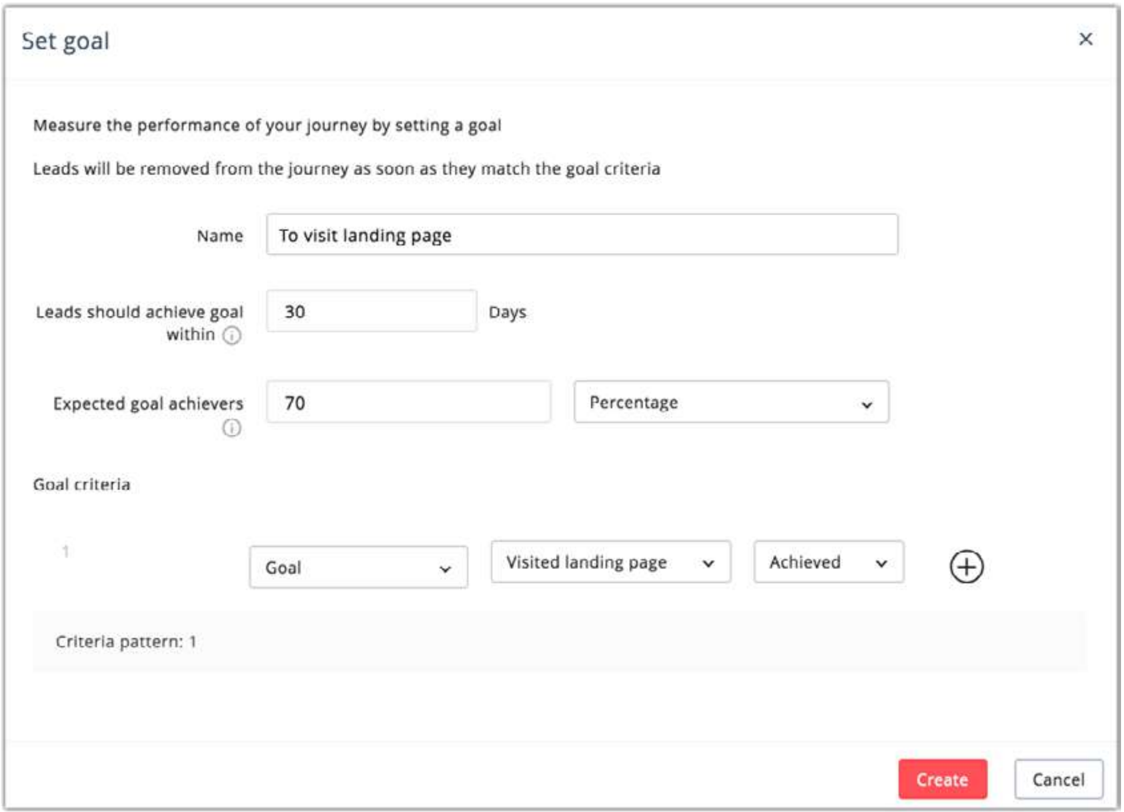
- All end nodes of conditions should be connected
- All email content should have been reviewed

Setting up a goal

Set up goals to measure the performance of your journey. Analyze the number of interactions it takes your leads to achieve goals. A goal is the journey's ultimate objective. When leads achieve a goal they will be removed from the journey.

To set up a goal:

1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Select the journey for which you want to set goal.
3. Click **Set goal** from the detail view.
4. Fill in the following information:
    - Enter a **name** for your goal.
    - Set the **time period** within which the leads should meet the goal criteria. Only when leads meet this criteria within the set time, they will be considered as goal achievers and will be removed from the journey.
    - Set expected goal achievers to analyze your journey's performance. You can set this in percentage or in lead count.
    - Set the goal criteria based on lead information and activities.
5. Click **Save**.



To edit a goal:

1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Select the intended journey from the list view.
3. Click **View goal** from the detail view.
4. Make the necessary changes and click **Save**.

Journey reports

Once you've activated your journey you will be able to view the reports. There are three types of reports:

- Version-based report
- Detailed report
- Action-based report

Version-based report

To view version-based report:

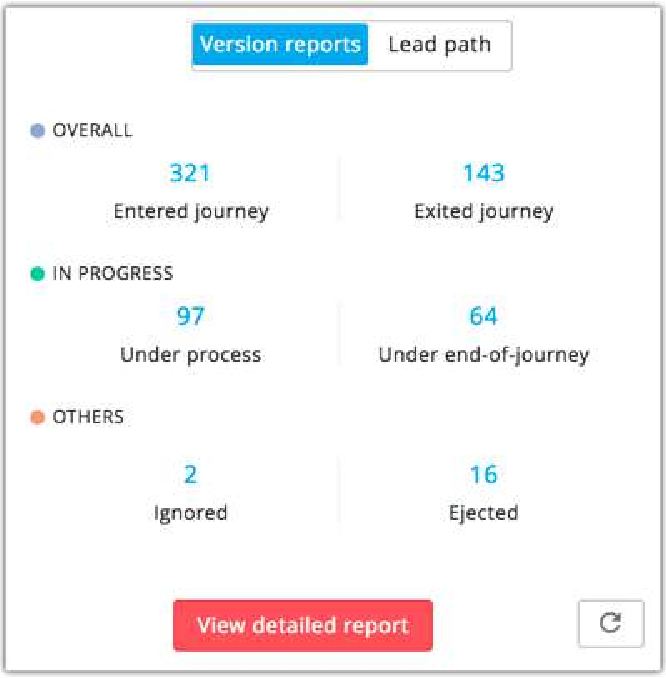
1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Select the journey for which you want to view the reports.

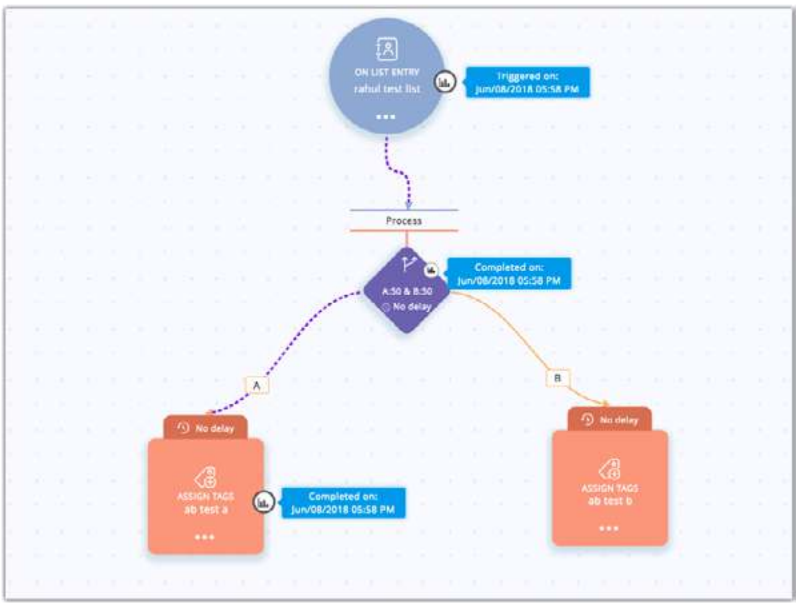
In the journey's detail view select the version you wish to view reports for. Under the Version reports tab, you will get insight about the number of leads who:

- Entered that journey version
- Are under process
- Are under end-of-journey
- Were ejected from the journey version or process
- Exited that journey version
- Were ignored (those who unsubscribed and were moved into the Do-not-mail registry are counted in this category)

Clicking each of these will display the list of leads. From here, you can trace the path taken by your leads in the journey. Click on the leads' email address to trace their path.

You can also trace the leads path from under the **Lead path** tab. Here, you can enter the lead email address, click **Trace path** and view the lead's path.





Detailed report

Detailed report has more illustrated stats than just plain numbers. It includes Summary, versions-based report, goal-based report, lead-based report, and messages-based report. To view the detailed report click the Reports button on the top-right corner from the detail view page.

To view detailed report:

1. From the **Navigation** toolbar, select **Journeys** and choose **Journey reports**.
2. Select the journey for which you want to view the reports.

Summary

Summary includes an overall count of leads in every stage (entered, exited, under process, under end-of-journey, ejected and ignored), time-based report, user agent stats, location-based stats, locations with maximum number of opens, top clicked URLs, and leads who've reached milestones.

- Overall report

  Under this report you can view the number of leads who:

  - Entered the journey
  - Have achieved the journey goal (if a goal is set)
  - Are under process
  - Are under end-of-journey
  - Were ejected from the journey or process
  - Exited the journey

  - Were ignored (those who unsubscribed and were moved into the Do-not-mail registry are counted into this category)

  Clicking each of these will display the list of leads.

- Time-based report

  From the time-based report you can see the number of leads who've entered and exited your journey in a given period.

- User agent stats

  These stats show you the hardware and software used by your leads for opening your email. With these stats you can find out how well your email is performing in a specific device, operating system, or web browser.

- Locations-based stats

  With this map, you can view the countries in which your emails have been opened.

- Top five stats

  This part of the report shows you the top five locations where your messages have been opened and the top five URLs clicked.

- Milestones

  If you have set milestones in the journey, you will be able to view the number leads who reached the milestone.

Versions-based report

Version report includes opens and clicks for each version, as well as the leads count in every stage under each version.

Goal-based report

Goal-based report includes overall stats, time-based reports and list of goal achievers.

- **Overall stats**

  Under this report you can view:

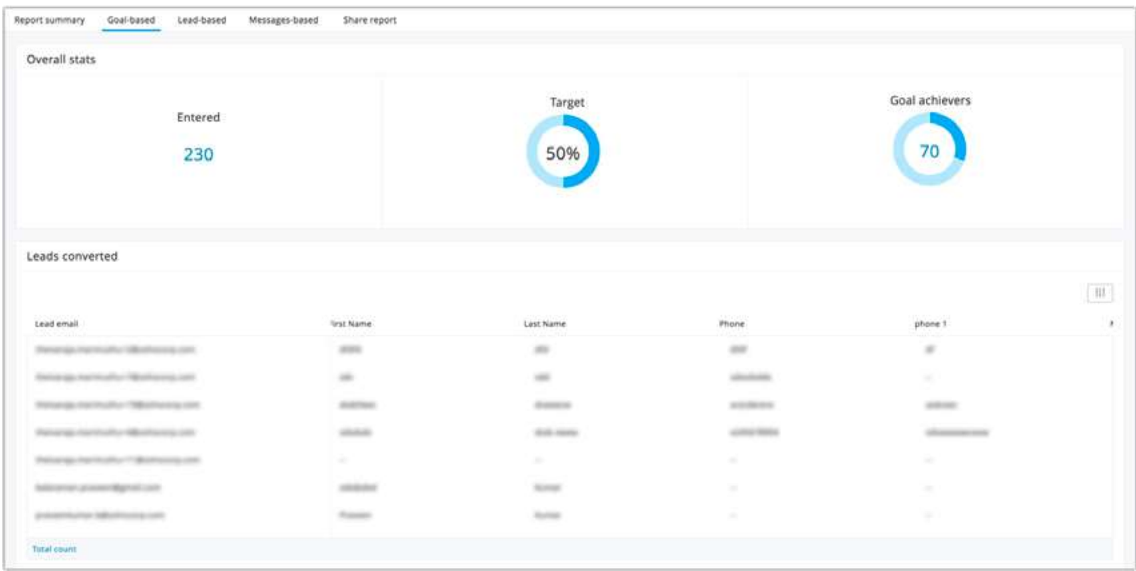
  - The number of who entered the journey
  - The goal achievers target you've set
  - The number of leads who achieved the goal

- **Time-based reports**

  From the time-based report, you can see the number of leads who've achieved the goal in a given period.

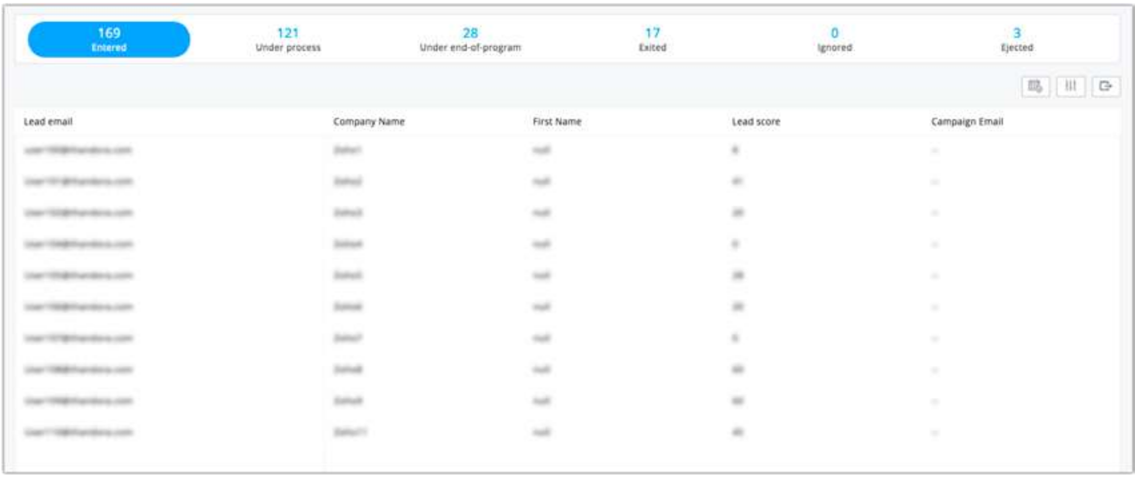
- **Goal achievers**

  Here, you will be able to view the list of leads who've achieved the goal.



Lead-based report

This report will give you a list of leads under each stage of the journey.



Messages-based report

Messages-based report includes overall stats, time-based report, activities-based recipient list and message-specific report.

- Overall stats

  Under this section you will be able to view the following:

  - Number of emails sent
  - Number of emails delivered
  - Number of emails bounced
  - Number of opens
  - Number of clicks
  - Number of unsubscribes

- **Time-based report**

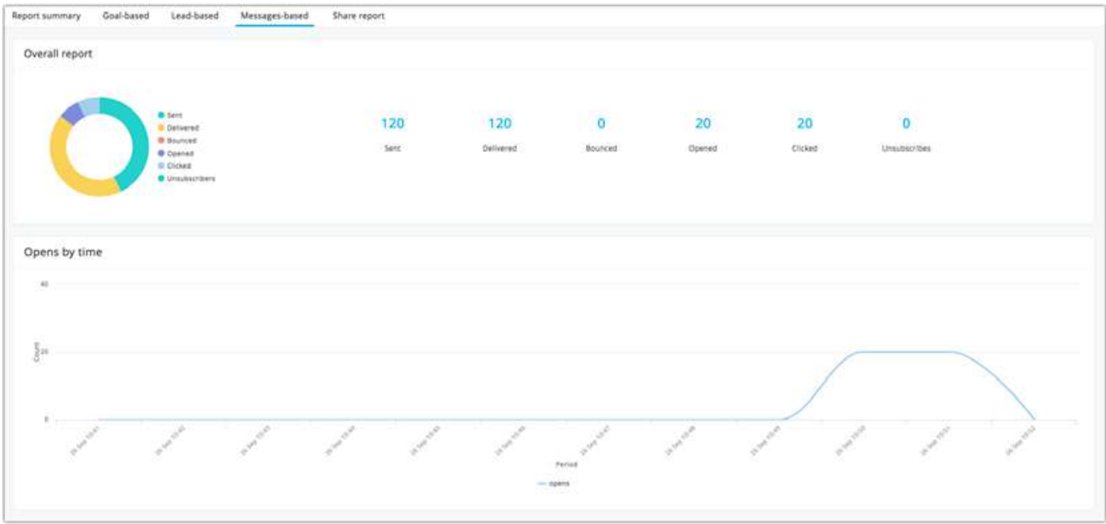
  Under time-based report, you will be able to view the total number of opens and clicks made over time.

- **Activities-based recipient list**

  Under this section you will be able to view the list of recipients who have opened and clicked the autoresponder messages.

- **Message-specific report**

  Under this section, you will be able to view the total number of recipients, opens, clicks, bounces and unsubscribes for a specific message. To view a detailed report of every message, click **View detailed report** button next to the message report. This will take you to the *Reports* page , which displays the message delivery rate, open rate, click rate, number of unsubscribes, recipient activity, user agent stats, and more.



Share report

From this section, you can share journey reports with your colleagues. They can access the report through the link that will be generated. You should secure your lead information with a password.

To share a journey report:

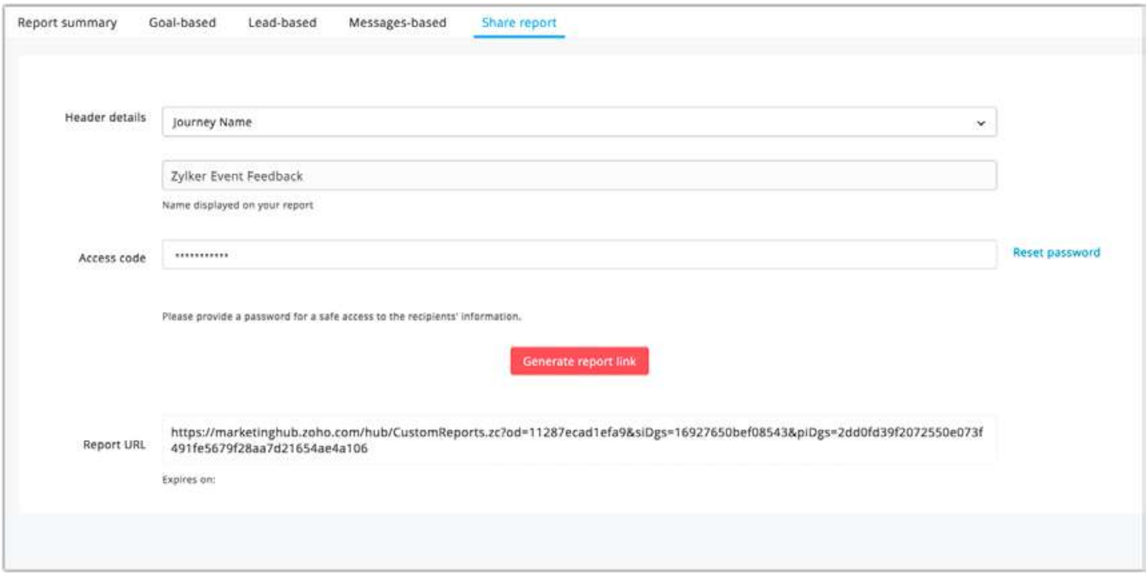
1. From the **Navigation** toolbar, select **Journeys** and choose **Journeys report**.
2. Click the journey that you want to share the reports for.
3. Select the Share reports subtab.
4. Fill in the following details,
    - **Page title** - You can have your journey's name as the title or enter a title of your choice.
    - **Access Code** - Provide a password to protect your leads' information.
5. Click **Generate report** link to generate the report URL.

With this URL, the journey reports can be accessed.

Note:

- Report links expire 15 days from generation.

- Journey reports can be shared with anyone. A Zoho MarketingHub account is not necessary for access.



Action-based report

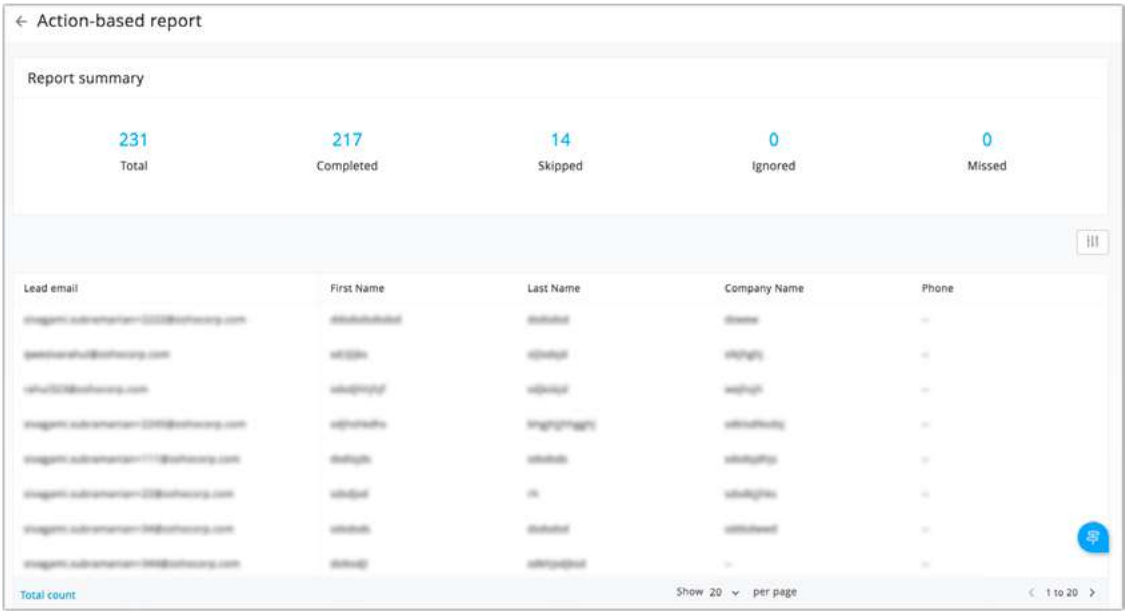
To view action-based report:

1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Select the journey for which you want to view the reports.
3. Click **Reports** icon next to the action you want to view reports for.

Under action-based report you will gain insight on the following:

- **Total -** Number of leads who had passed through the action component
- **Completed -** Number of leads the action was performed on
- **Skipped -** Number of leads who match the skip criteria and skip the action

- **Ignored -** Number of leads who unsubscribed and were moved to the Do-not-mail registry
- **Missed -** Number of leads who passed through when the action was paused



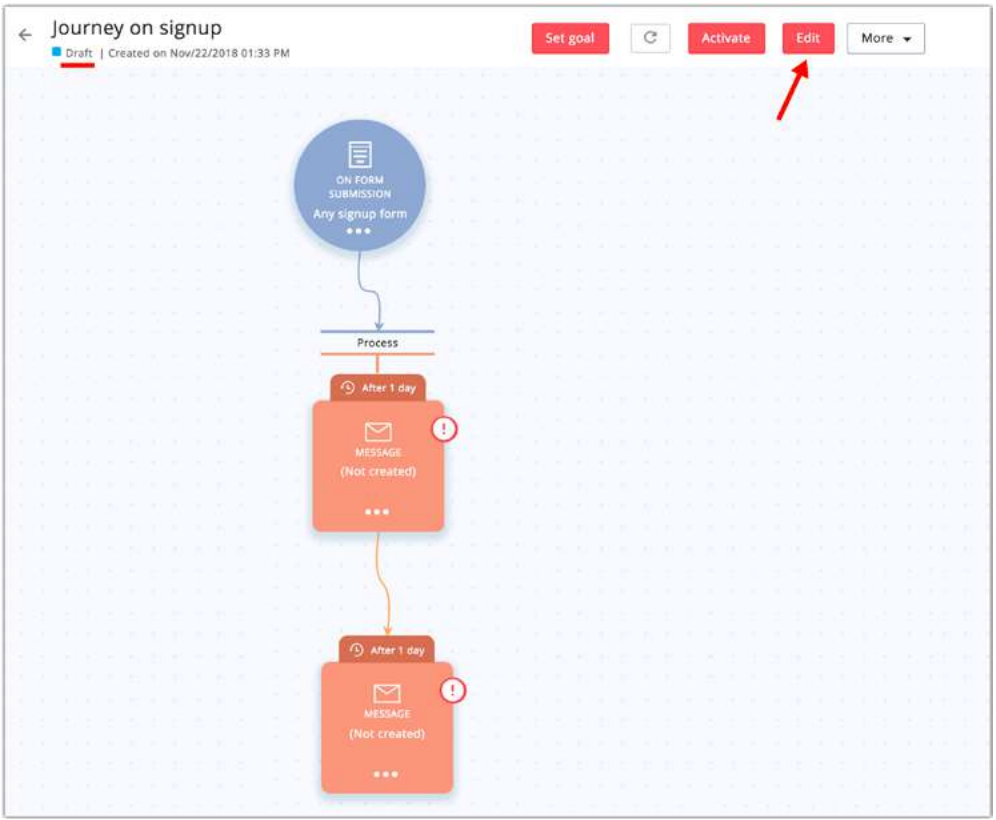
Managing journeys

How do I edit a journey?

To edit a journey in draft:

1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Select the intended journey from the list view.
3. Click the **Edit** button in the top-right corner of the journey detail view page.

This will open the journey canvas, where you can make the necessary changes.



To edit a running journey:

Editing an active journey will create a new version; changes that you make will be saved to this new version.

1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Select the intended journey from the list view.
3. Click the **More** button in the top-right corner of the journey detail view page and select the **Edit** option.

This will open the journey canvas, where you can make the necessary changes.

Once you're done with the changes, activate the new version. Activating this version will freeze the previous active version. In other words, it will stop taking in new leads and process only the leads who already entered that version. The newly activated version will take in the new leads. You can have a maximum of 25 active (running of frozen) versions per journey.

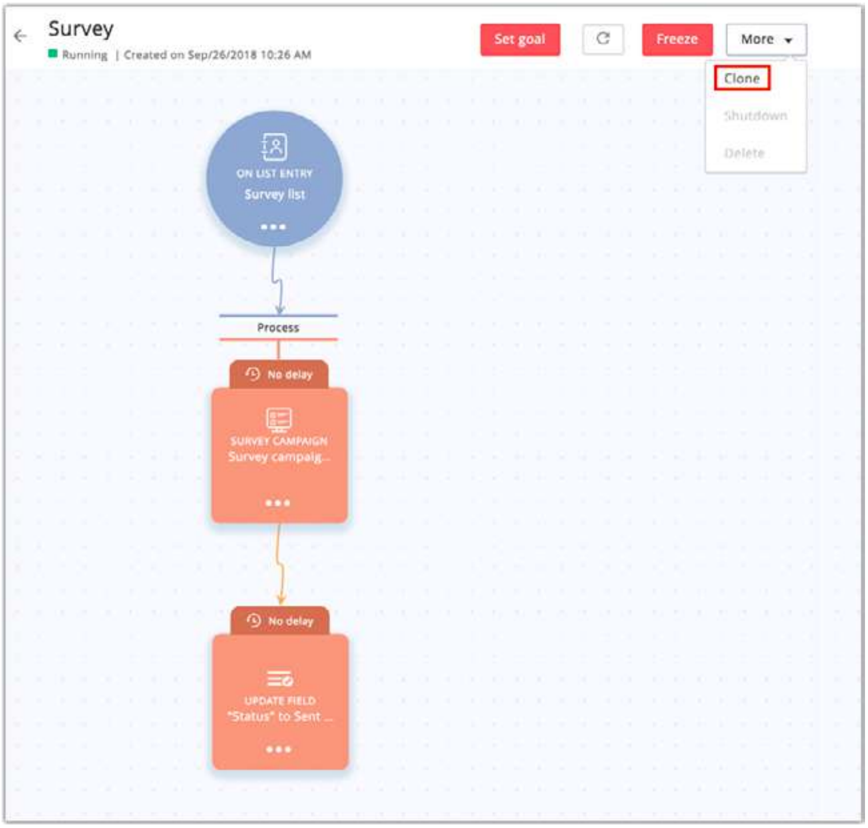
How do I clone a journey?

To edit a journey in draft:

1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Mouse over the journey you wish to clone. The **Clone** icon will appear in the far-right corner. Click this icon to create a clone of the active version of the journey.

If you want to create a clone of a specific version of your journey:

1. From the **Navigation** toolbar, select **Journey** and choose **All journeys**.
2. Select the intended journey from the list view.
3. Select the version you want to clone from the top-right corner.
4. Click the **More** button in the top-right corner of the version detail view page and select the **Clone** option.



How do I stop a journey from processing on new leads?

Freeze the running journey to stop it from processing on new leads. Actions will be performed on the leads who had entered the journey before you froze the journey.

To do this:

1. From the **Navigation** toolbar, select **Journeys** and choose **All journeys**.
2. Select the journey you wish to freeze.
3. Click **Freeze** in the top-right corner.

You can also freeze the journey from the list view. Mouse over the journey you wish to freeze. Click the **Freeze** icon in the far-right corner.

Click **Resume** button on the top-right corner of the page if you want to resume the journey.

How do I completely stop a journey?

Shut down a journey if you need to stop it from processing any leads (even those leads who have already entered the journey). You can only shut down a frozen journey.

To do this:

1. From the **Navigation** toolbar, select **Journeys** and choose **All journeys**.
2. Select the journey you wish to shut down.
3. Click **Freeze** in the top-right corner if the journey is not already frozen.
4. After the journey is frozen, click **More** in the top-right corner and select **Shut down**.

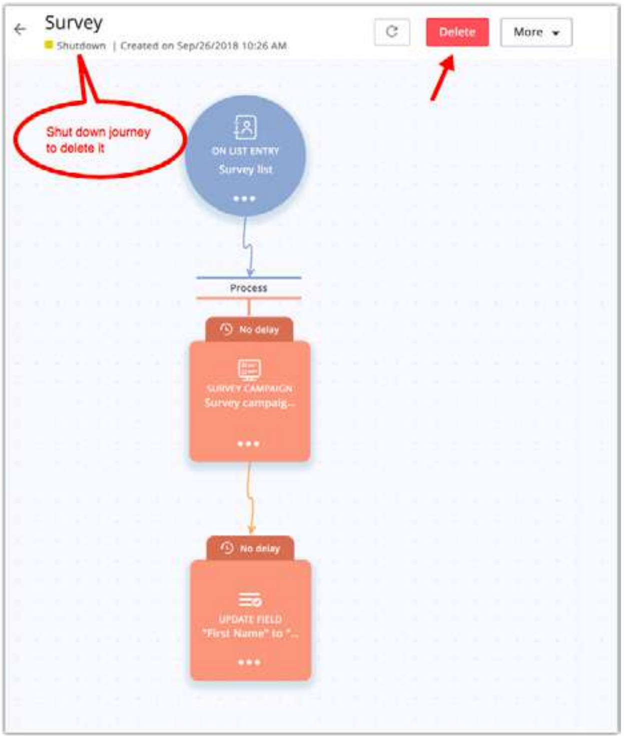
For a safe shut down, you can freeze the journey and wait for it to perform actions on the leads who have already entered the journey, then shut it down.

How do I delete a journey?

A running journey cannot be deleted. You need to shut the journey down before you delete it.

To do this:

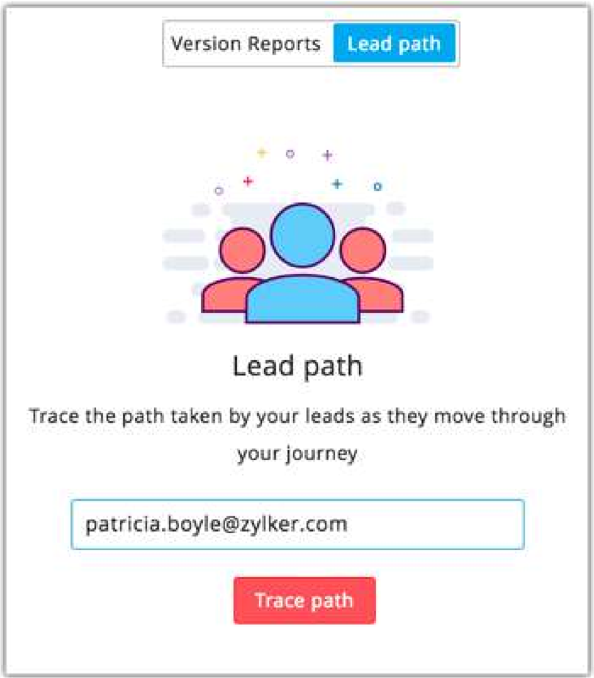
1. From the **Navigation** toolbar, select **Journeys** and choose **All journeys**.
2. Click the journey you wish to delete.
3. Click **Freeze** in the top-right corner, if the journey is not already frozen.
4. After the journey is frozen, click **More** in the top-right corner and select **Shut down** if the journey is not already shut down.
5. After the journey is shut down, click **More** in the top-right corner and select **Delete**.



How do I trace my lead's path?

You can view the exact path your leads took at any point.

From the reports section, select **Lead path**. Provide the email address of the lead. The path the lead took will be highlighted in the flow.



Journey status

- **Active** : When you have activated the journey and the journey is
- **Draft** : Before you activate the journey
- **Frozen** : When you manually freeze an active journey
- **Suspended** : When the custom field used in the Eject criteria has been deleted. If needed, you can edit the criteria. You will then need to activate the journey manually.

- **Stopped** : A journey will be stopped for the following reasons:
  - When the source mailing list is deleted.
  - When the date field associated with a date-field trigger has been deleted.
  - When goal or the domain associated with a goal achieved trigger is deleted or is inactive.
  - When the field associated with a field update trigger is deleted.
  - When the video associated with a video click trigger is deleted.
  - When the file associated with a attachment download trigger is deleted.
  - When the tag associated with a tag assigned or a tag removed trigger is deleted.

Message status

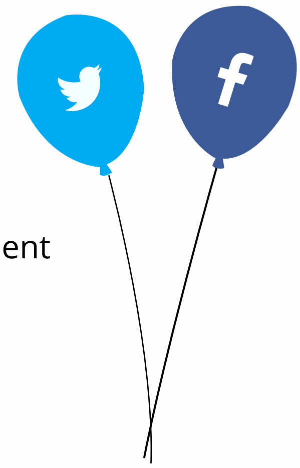
- **Active** : When you have activated the message and the message is running
- **Paused** : When you manually pause the message
- **Suspended** : When the custom field used in the Message skip criteria has been deleted. If needed, you can edit the criteria. You will then need to activate the message manually.

- Stopped : A message will be stopped for the following reasons:
    - When the merge tag used in the message subject line has been deleted.
    - When the video tag used in the message content has been deleted.
    - When the message's sender address has been deleted.

Contact us:

Zoho Corporation
4141 Hacienda Drive
Pleasanton,
California 94588, USA

+1 (888) 900 9646 (USA)
+44 (20) 35647890 (UK)
support@zohomarketinghub.com



Please feel free to share this document

You can find more details and step by step instruction on our Online Help.
Visit https://www.zoho.com/marketinghub/ to sign up for a free account!