

Understand process components

The process components determine the direction your contacts will take in your journey. The journey's flow can be decided using the process components according to predefined criteria, contacts' behaviour, or at random. The merge process component also allows you to combine two branches of your journey.

Six different process components are available in Zoho Marketing Automation that you can utilise to create a variety of paths for contacts to travel in your journey. In this article, you will learn about these process components and how to use them.

If/Else

This is a simple condition where you can set criteria for contacts to satisfy. When contacts reach this stage of the process they will be checked if they meet the criteria or not and will take the corresponding path. To configure this:

← All Journeys Webinar list		Save	Review and Launch 🕸 :
BUILDER			
Q Search components			0 C
TRIGGER			
PROCESS ~	IF/ELSE 🖉 🖗 🗇 🗇 🖓		
[⁴ ⁴ ¹ ²	The contact follows the path that matches the criteria configured.		
lf/Else Multi-way Check Email Split Activity			
	False True		
Check SMS Random Merge Activity Split			
ACTION			· · · · · · · · · · · · · · · · · · ·

1. Drag and drop the If/Else process onto the builder.

2. Click the **Edit** icon.

3. Enter the criteria, the modifier and its value.

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plit the path b heir email acti	based on ivity	a if/else condition	on.Set the conditions based on co	ontact information or
Criteria*		Modifier*	Value*	
Select	~	Select	Select	+
		(+	ADD NEW GROUP	
Save	Cance	!		

- 4. Click Add Group to add another condition that can be combined with a AND/OR condition. You can set as many conditions as you want.
- 5. Click Save.
- 6. Configure the TRUE and FALSE paths with appropriate actions that contacts will take.

Multi-way Split

Segment your contacts based on the criteria you've created using their field value and create separate paths for each segment. You can create up to six paths for the values you provide, and add another path where all these conditions are not met.

To configure this:

1. Drag and drop the **Multi-way split** process onto the builder.

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TRIGGER		
PROCESS ~		
k + S	MULTI-WAY SPLIT 🖉 🖗 🗗	
lf/Else Multi-way Check Email Split Activity	Configure Multi-way split	
Check SMS Random Merge Activity Split		
ACTION		

2. Click the **Edit** icon.

Multiway split	×
Segment your contacts based on their field value and create separate paths for each segment	
Select the field	
Select field	~
Branch Name	
Name 1	
Select V Select	
Branch Name	
Name 2	
Save	

- 3. Select the field based on which you will be splitting the journey into paths.
- 4. Add the name for the branch and enter the criteria that must be satisfied.
- 5. Enter the name of the Else branch for those contacts who do not satisfy any of the criteria you've set.
- 6. Click Save.

Check Email Activity

Allow contacts to enter your journey based on their past email activity and select the email actions they should have performed to create various paths.

To configure this:

1. Drag and drop the **Check email activity** process onto the builder.

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TRIGGER		>					
PROCESS		~					
ا ا							
· If/Else	Multi-way Split	Check Email Activity	Configure Email activity				
Check SMS Activity	↓ ↓ Random Split	↓ Merge					
· []							
ACTION		>			 		

2. Click the **Edit** icon.

Check email activity	×
This block will be triggered when the contacts enter the branch/branches you select.	
Specific email	
Select	~
Journey email	
Select branches to add	
Delivered	
Not sent	
Opened	
Unopened	
Any link clicked	
Not clicked on any link	
Replied	
Not replied	
Skipped	
Specific link clicked	
Save Cancel	

- 3. Select a specific email or a journey email that the contacts who will enter this component have already received.
- 4. Select the email actions the contacts should have performed to add the different branches.
- 5. Click Save.

Check SMS Activity

Allow contacts to enter your journey based on their SMS activity and select the email actions they should have performed to create various paths.

To configure this:

1. Drag and drop the **Check SMS activity** process onto the builder.

← All Journeys Webinar list		Save	Review and Launch
BUILDER			
Q Search components	•		5 C
TRIGGER			
PROCESS ~			
k + B	CHECK SMS ACTIVITY 🖉 🗇 🗗		
lf/Else Multi-way Check Email Split Activity	Configure SMS activity		
	· · · · · · · · · · · · · · · · · · ·		
Check SMS Random Merge Activity Split			
ACTION >			

2. Click the **Edit** icon.

Check SMS activity	×
This block will be triggered when the contacts enter the branch/branches you select	
Specific SMS	
Select	~
Journey SMS	
Select branches to add	
Sent	
Not sent	
Delivered	
Not delivered	
Clicked	
Not Clicked	
Save Cancel	

- 3. Select a specific SMS or a journey SMS that the contacts who will enter this component have already received.
- 4. Select the actions the contacts should have performed to add the different branches.
- 5. Click **Save**.

Random Split

You can choose to control the flow of your journey by splitting its path randomly into two groups of contacts. To configure this:

1. Drag and drop the **Random split** process onto the builder.

← All Journeys Webinar list		Save	Review and Launch 🕸 :
BUILDER			
Q Search components			
TRIGGER			
PROCESS ~	RANDOM SPLIT		
If/Else Multi-way Split Check Email Activity	The contact follows one of the two paths configured		
Check SMS Activity Random Split	A-50% O		
ACTION			

2. Click the **Edit** icon.

Random s	plit								×
Select percer	natge of c	ontacts th	nat should	d enter in	each patł	۱.			
PATH A PATH B 50% of recipients 50% of recipients									
10	20	30	40	50	60	70	80	90	
Save	Cance	el							

- 3. Drag the cursor across the indicator to apply the split percentage for each group.
- 4. When contacts reach this stage, they will be randomly put into each path.
- 5. Configure the two paths with appropriate actions that contacts will take.
- 6. Click **Save**.

Merge

Allow contacts from multiple paths to enter a single path by using the merge component. To configure this, drag and drop the Merge process onto the builder and connect it with the different paths. When contacts reach this stage they will merge into one path.



Manage Process components

You can edit, delete and clone processes in your journey. Zoho Marketing Automation also allows you to edit you active journey. Read on to learn how to perform these actions.

Manage draft versions of your journey

To edit a process in draft:

1. Click the **Edit** icon on the desired process component.

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TRIGGER	>			
PROCESS	>			
ACTION	>	IF/ELSE / 🗟 🗗		
		The contact follows the path that matches the criteria configured.		
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2. Edit the process and click **Save**.

To clone a process in draft:

1. Click the **Clone** icon on the desired process component.

← All Journeys Zylker		Save	Review and Launch 🕸 🗄
BUILDER			
Q Search components			0 0
TRIGGER	>		
PROCESS	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>		
ACTION	> IF/ELSE / B D		
	The contact follows the path that matches the criteria configured.		
	False True True		

2. A clone of the process will automatically appear on your builder.

To delete a process in draft:

1. Click the **Delete** icon on the desired process component.

← All Journeys Zylker		Save	Review and Launch
BUILDER			
Q Search components			S C
TRIGGER >			
PROCESS >			
ACTION >	i i i i i i i i i i i i i i i i i i i		
	The contact follows the path that matches the criteria configured.		
	E-bise True		

Manage live journeys

To edit a process in an active journey:

1. Click **Pause** on the top-right of the journey builder and click **Edit**.

All Journeys Zylker			Edit Pause 🕸 :
JOURNEY REPORTS CONTACTS			
			Entire duration Mar 10, 2023 Y
ENTERED ()	EXITED ①	RE-ENTERED (i)	GOAL ACHIEVED (i)
437	0	0	437
X-RAY		ADDED TO LIST	
 Most engaged Action component 		Trigger to existing and new contact added to list pop	ts
 Least engaged Action component 		→ 437 → 437 &	• • • • • • • • • • • • • • • • • • •
 Most engaged path 			
 Least engaged path 		· · · · · · · · · · · · · · · · · · ·	
TRACE CONTACT PATH	ASSIGN TAG		
	Assign tag 55 to the co	ntact.	
	- $ -$		

2. Click the **Edit** icon on the desired process component.

All Journeys Zylker							Relaun	:h	Discard	
JOURNEY REPORTS	CONTACTS									
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TRIGGER	>	addec	I to list push list							
INIGOER	,									
PROCESS	>									
ACTION	>			*						
		IE/ELSE		WAIT CONDITION	0 🛈 🗗					
				Wait condition configured	with delay 1					
		Configure If/Else spli	it	hour	I WITH GETAY I					
		9								

- 3. Edit the process and click **Save**.
- 4. Click **Relaunch** to activate the journey again.

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`	Zylker						
	JOURNEY REPORTS	CONTACTS					
	Q Search components		ASSIGN TAG	0 1 0			
	TRIGGER	>	Assign tag 55 to the contact.				
	PROCESS	>	· · · · · · · · · · ·	· · · · · · · · ·	· · · · · · · · · · · ·		
	ACTION	>			UPDATE LEAD SCORE	2 ₫ ₽	
					Increase the contact's sco	re by 1	
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			Wait condition day	on configured with delay 1			
			· · · · · · · · · · ·				
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To clone a process in an active journey:

1. Click **Pause** in the top-right corner of the journey builder and click **Edit**.

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ENTERED ① 437	exited () O	RE-ENTERED ① O	GOAL ACHIEVED ① 437
Most engaged Action component		ADDED TO LIST Trigger to existing and new co added to list pop	ontacts
 Least engaged Action component Most engaged path 			&
Least engaged path			
TRACE CONTACT PATH			
	Assign tag 55 to the → 0 → 0	2 contact.	

2. Click the **Clone** icon on the desired process component.

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3. A clone of the process will automatically appear on your builder.

4. Click **Relaunch** to activate the journey again.

← All Journeys Zylker				Relaunch	Discard 🔯
JOURNEY REPORTS CO	NTACTS				
Q Search components	ASSIGN TAG	∅ ⊕ ⊡			
TRIGGER	> Assign tag 55	to the contact.			
PROCESS	>		· · · · · · · · · · · · · · · · · · ·		
ACTION	>		UPDATE LEAD SCORE 🖉 🕅	ð	
			Increase the contact's score by 1		
		· · · · · · · · · · · · · · · · · · ·			
		WAIT CONDITION			
		Wait condition configured with delay 1 day			
		Time out On conditio			

To delete a process in an active journey:

1. Click **Pause** on the top-right of the journey builder and click **Edit**.

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J	entered ① 437	EXITED ① O		re-enter O	ED (i)		GOAL ACHIEVED ① 437	
×	-RAY			· · · · · · ·	ADDED TO LIST			
•	Most engaged Action component				Trigger to existing and ne	w contacts		
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	Least engaged path		· · ·	· · · · · ·				
τι	RACE CONTACT PATH	ASSIGN TAG Assign tag 55 to the cor	ntact.					
		$\rightarrow 0 \qquad \rightarrow 0$	4					

2. Click the **Delete** icon on the desired process component.

All Journeys Zylker						Relaunch	Discard &
JOURNEY REPORTS	CONTACTS						
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		Trigger to existing a	and new contacts				
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ACTION	>			¥			
		IF/ELSE		WAIT CONDITION 0 to to	P		
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		Configure If/Else split		hour			
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- 3. The process will be deleted from your builder.
- 4. Click **Relaunch** to activate the journey again.

All Journeys Zylker					Relaunch	Discard
JOURNEY REPOR	TS CONTACTS					
Q Search components		ASSIGN TAG	/ @ ₽			
TRIGGER	>	Assign tag 55 to the contact.				
PROCESS	>		· · · · · · · · ·			
ACTION	>			UPDATE LEAD SCORE	0 🖻 🗗	
				Increase the contact's	score by 1	
		wait condition	ITION 🖉 🗊 🗗			
		day				
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(i) Related Topics

• Read our article to learn how to create a journey in Zoho Marketing Automation.