

Using Automations

Experience unparalleled automation with SmartEngage. Effortlessly schedule email sends, SMS, Facebook broadcasts, and push notifications to engage your list, streamlining your communication and maximizing impact.

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Creating Sequences

Creating automation sequences is a powerful way to run your business on autopilot


Visit your Automation page here: <https://smartengage.com/automation>

1. Go ahead and click the top right button for New Sequence.
2. You'll notice on the left side we have a column of blocks. Each block serves a specific purpose. You can click and drag a block into the sequence editor in order to start using it.

START-IF


This is your trigger block. The actions configured here dictate what must occur in order for this entire sequence to begin. When you click the top left corner of the **IF** block you will see options to set your Trigger. **In many cases the trigger used is IF a particular Tag is applied.**

Also, take note that in the top left corner of the START block is an option to configure if you want this sequence to run just once per subscriber when triggered (default) or every time it is triggered regardless of how many times the subscriber has already run through this particular sequence.

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IF

This block is very similar to the **START-IF** block except you can place this one throughout your sequence. It can be used to set conditionals with Yes or No arrows which dictate how you want your subscribers to move along your sequence. Thing such as IF a page is visited, IF an email is opened, or IF a tag exists are all very common uses of this block.

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Delay

This block is a great way to configure time delays between sending communications. You may want to set it so that after a tag is applied the **Delay** block will pause the sequence for 5 minutes and then send the next email. Or you may want to deliver a Facebook Message today and then delay 1 Day before sending the next Message automatically. You can also specify certain days, months, or even times for this block.

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Email

The top left of this block allows you to create your email via a popup window. On this popup you will see 3 tabs.

Template Editor - This is the first tab and allows you to create emails using drag and drop style widgets for things like text, images, dividers, etc. It is a very simple and powerful builder. It is how we built the email you are reading right now.

Plain Text Editor - This is the second tab and allows you to quickly create a simple email with basic HTML editor functionality.

HTML Editor - This is the 3rd tab and is for advanced users who wish to have complete control over the html code of the email.

The top right corner will allow you to see the statistics for this particular email to review things like opens, clicks, and conversions.

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Facebook Messenger

This block allows you to configure Facebook Bot Messages which will be sent as your connected Facebook Fan Page. For more information about building your Facebook message bots please see this article : <https://smartengage.com/knowledge-base/books/content-templates/page/creating-content-for-facebook-messenger>

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Push Notification

This block allows you to configure Desktop Push Notifications.

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Actions

This block is very helpful to apply different actions to your subscribers depending on where they are on their journey through the sequence.

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Stop

Although not 100% necessary to use, this block provides a nice visual component to assist you in deciding where a sequence should stop.

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For a full video overview of setting up Automation sequences please watch below:

<https://player.vimeo.com/video/288630605>

Facebook Messenger Keyword Trigger Sequence

Please watch this video demonstrating how to use Facebook Messenger Keyword Triggers.


<https://player.vimeo.com/video/283086082>

Setting up "Rule"


Rules are a great way to setup specific Triggers and Actions.

A common example might be that IF (Trigger) a subscriber has #tag_a applied THEN (Action) remove #tag_b

1. To get started creating a rule just click on "Engage > Automation" from your left navigation area.

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2. Next click on the "New Rule" button on the lower right area of your screen.

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3. Please watch this video for an explanation of setting up Triggers and Actions for Rules

<https://player.vimeo.com/video/283819059>