



Create a journey in Marketing Automation

In Zoho Marketing Automation, a journey is an automation tool that enables you to build various business solutions by setting up processes your contacts will travel through based on specific criteria and targeted emails. With journeys, you can automate repetitive tasks, configure an engagement flow with your contacts using triggers, create processes that your contacts need to go through, and have actions performed on them.

To create a journey

1. From the *Navigation* tool bar, choose **Journeys** and select **View Journeys** .

The screenshot displays the Zoho Marketing Automation interface. On the left is a dark navigation sidebar with the following menu items: Marketing Automation, Dashboard, Contacts, Lead Generation, Journeys (highlighted with a red arrow pointing to 'View Journeys'), Marketing Planner, Marketing Campaigns, Website Analytics, and Library. The main content area shows a search bar at the top, a greeting 'Good Morning, Patricia', and a date range 'This year Jan 01, 2023 to Feb 20, 2023'. Below this are two tabs: 'OVERALL' (selected) and 'EMAIL'. A summary card displays four key metrics: Contact captured (2,406, up 100%), Deals won (20), Total revenue (\$100,000), and Avg revenue for contact (\$2,000). The bottom section is titled 'CONTACTS LIFECYCLE STAGE' and features a funnel chart with the following data:

Stage	Count	Next stage c...	Average con...	Average eng...
Raw leads	200 (▲ 100%)	70 (▼ 100%)	15 Days	10
Marketing ready	150	30	15 Days	10
Marketing engaged	50	15	10 Days	5
Marketing qualified				

2. Click the **Create** button at the top right of the list view page.

Marketing Automation

Search by name, email, and phone

Journeys

JOURNEYS LISTING

39 Journeys created

All Folders All I am searching for journey

JOURNEY NAME	STATUS	CONTACTS ENTERED	CONTACTS EXITED	
<input type="checkbox"/> Zylkey list Created on Feb 20, 2023 at 04:07 PM by Lal2021 Lal20...	Draft	0	0	⋮
<input type="checkbox"/> Trial List Created on Jan 31, 2023 at 11:43 AM by Lal2021 Lal20...	Draft	0	0	⋮
<input type="checkbox"/> California event list Created on Jan 30, 2023 at 05:14 PM by Lal2021 Lal20...	Draft	0	0	⋮
<input type="checkbox"/> New contact list Created on Jan 24, 2023 at 05:23 PM by Lal2021 Lal20...	Draft	0	0	⋮

3. In the **General Details** page, enter a **name** and a **description** for your journey. Click **Next** .

All Journeys

trier

General Details Use Template

Name

Zylker

Description

journey for all contacts who've attended the 'zylker' webinar

Next →

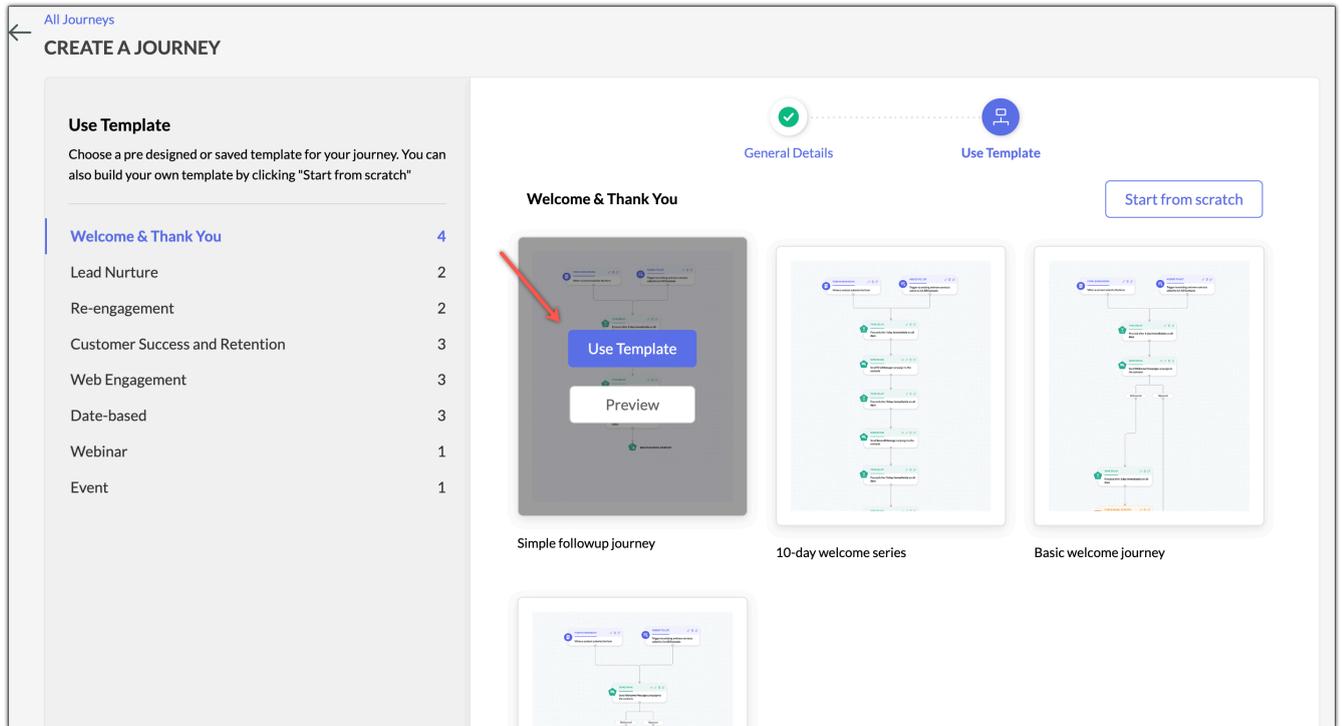
General Details

Basic information will help you to find the journey in the list view. You can provide a name and a brief description about your journey to proceed.

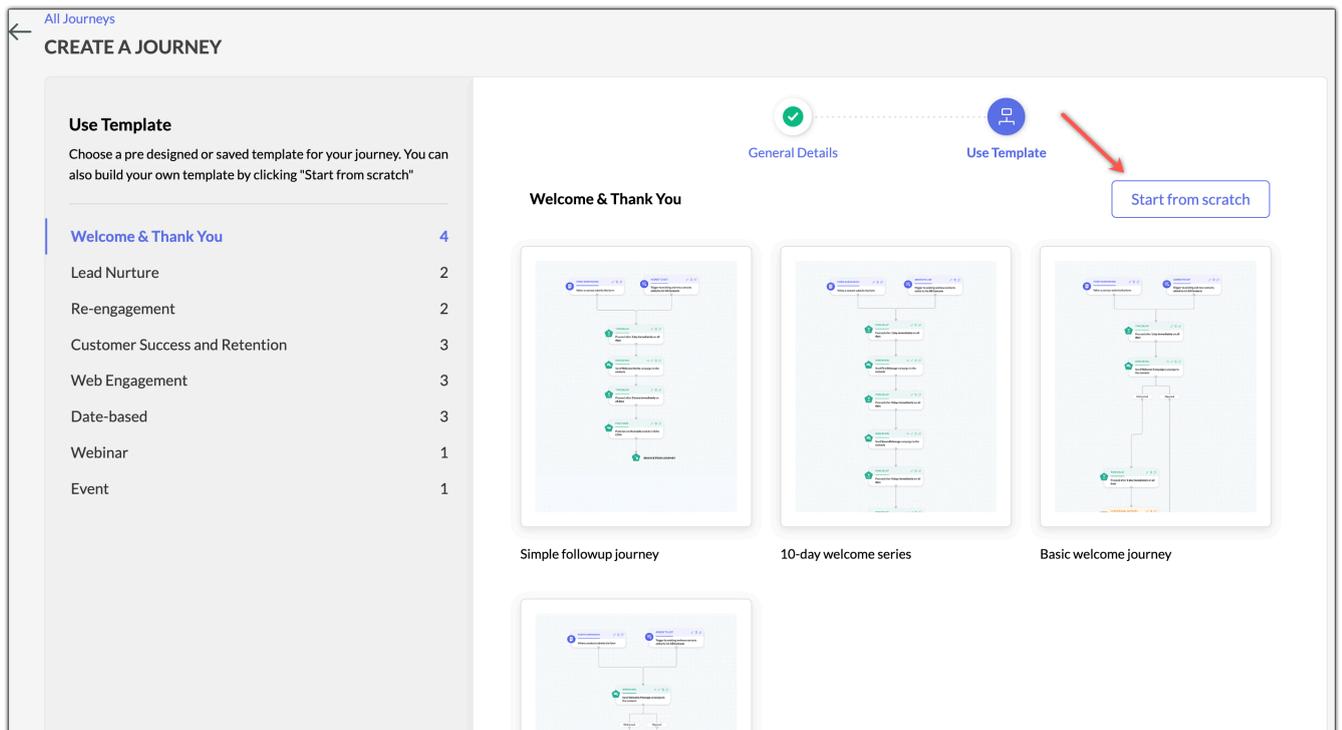
4. On the **Use Template** page, you have two options:

- You can select one of the **pre-designed templates** you would like to use from the left section. Hover over the template of your choice and click **Use Template** . Click **Preview** to get a brief description of

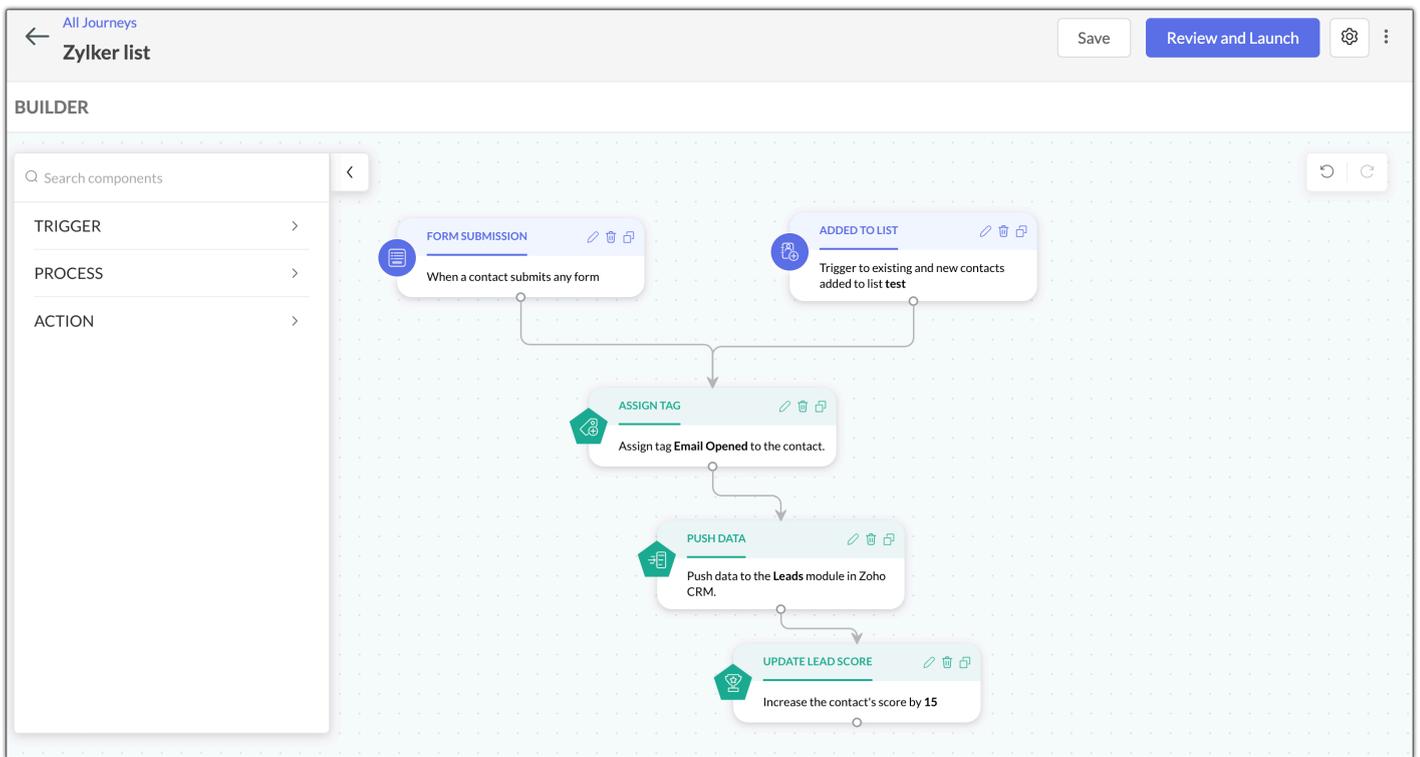
a template, its application, and the functionality of each component used.



- You can click **Start from Scratch** to build a custom journey using one of our predesigned templates.



5. From the left panel, drag and drop a trigger on to the builder to initiate the journey, and configure process and action components for contacts to perform.



6. Make sure to connect all your journey component.

Related Articles:

- To learn more about the various pre-designed templates we offer in Marketing Automation, click [here](#).
- Read our article on [Understanding Triggers](#) to learn about the various triggers you can use in your journeys and how they work.
- Read our article on [Understanding Processes](#) to learn about the various processes you can use in your journeys and how they work.
- Read our article on [Understanding Actions](#) to learn about the various actions you can use in your journeys and how they work.

To launch a journey

1. Click **Review and Launch** to make your journey live. You will see the total number of contacts qualified for this journey and a brief note about the criteria and goals configured for your contacts. You can edit the

goal and re-entry criteria for your journey by clicking the Edit icon.

The screenshot displays the Zoho Marketing Automation Journey Builder interface for a journey named "Zylker list". The interface includes a "BUILDER" section on the left with a search bar and categories for TRIGGER, PROCESS, and ACTION. The main workspace shows a workflow with the following steps:

- FORM SUBMISSION**: When a contact submits any form.
- ADDED TO LIST**: Trigger to existing and new contacts added to list test.
- ASSIGN TAG**: Assign tag **Email Opened** to the contact.
- PUSH DATA**: Push data to the Leads module in Zoho CRM.
- UPDATE LEAD SCORE**: Increase the contact's score by 15.

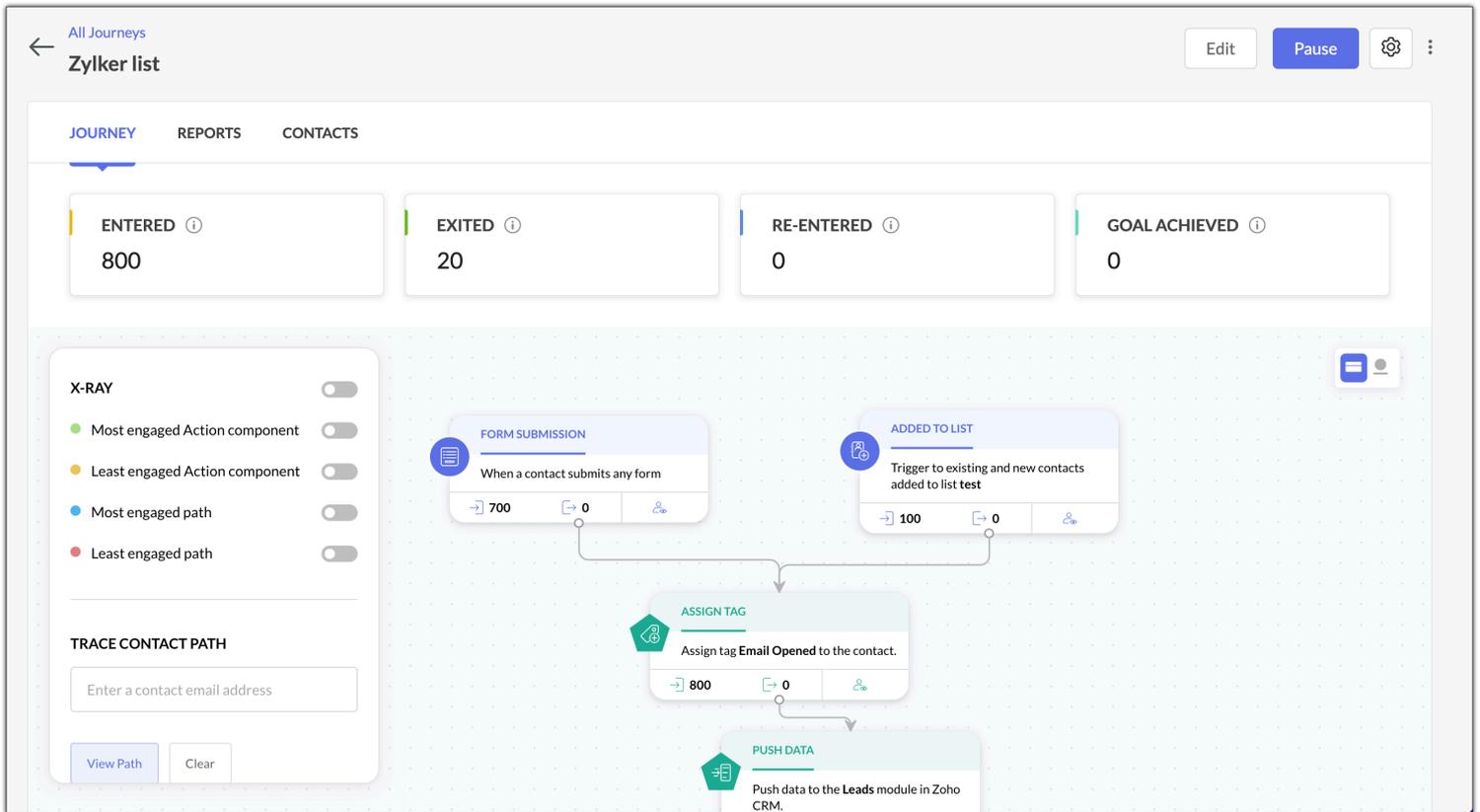
A notification box in the top right corner states: "1,000 contacts qualified for this journey." Below this, it notes "No goal set for this journey" and "Re-entry of contacts not allowed". A "Launch" button is present in the notification box. At the top right of the interface, there are "Save" and "Review and Launch" buttons, with a red arrow pointing to the "Review and Launch" button.

2. Click **Launch** to make your journey live.

3. If you're still working on your journey and wish to launch it later, click Save. You can access this draft from the journey list view. Click on the required journey and this will open the journey builder, where you can make any necessary changes. Click Review and Launch to make your journey live.

Tip: Zoho Marketing Automation enables you to edit, pause, and delete a live journey. Learn more about [how to manage your journeys](#).

Here's how your journey will look once it's launched:



The journey report will be available under the **Reports** tab, which shows relevant metrics to analyze your journey. [Learn more about journey reports.](#)

You can view the list of contacts entering this journey under the **Contacts** tab, where you can filter your contacts to see who've entered and exited the journey. You can also click the **Filter** icon to conduct an advanced search based on tags, scores, goals, and more.