



# Understand trigger components

A trigger is used to initiate a journey where contacts will enter when they meet the trigger criteria. By default, contacts will enter the journey for the first time when they satisfy trigger conditions. However, you can allow contacts to re-enter your journey whenever they meet trigger conditions by enabling re-entry criteria.

Zoho Marketing automation provides a list of triggers to build journeys that meet your organization's needs. In this article, you will learn about the various triggers we've to offer and how to use them.

## Added to list

This trigger starts a journey for those contacts who enter the selected mailing list.

To configure this:

1. Drag and drop the **Added to list** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the mailing list which contacts should enter or click Add new list from the drop-down to add a new list for this trigger.
4. Choose to allow entry of existing and new leads from this list or allow entry of leads who enter the list from now or allow entry of only those leads that are in the list right now in the selected list.
5. Click **Save**.

## Removed from list

This trigger starts a journey for those contacts who are removed from the selected mailing list.

To configure this:

1. Drag and drop the **Removed from list** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the list and click **Save**.

## Added to segment

This trigger starts a journey for those contacts who enter the selected segment.

To configure this:

1. Drag and drop the **Added to segment** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the target segment which contacts should enter.

4. Choose to allow entry of existing and new leads from this list or allow entry of leads who enter the list from now or allow entry of only those leads that are in the list right now in the selected list.
5. Click **Save**.

## Form Submission

This trigger starts a journey for those contacts who sign up through the form you select.

To configure this:

1. Drag and drop the **Form submission** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Choose any form or select a specific form.
4. Choose to allow existing contacts who have qualified for this journey already to enter again.
5. Click **Save**.

## Email Action

This trigger starts a journey when a recipient performs an action on the email you've sent them.

To configure this:

1. Drag and drop the **Email action** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select either any email that contacts have received or a specific email or a journey email.
4. Select the email actions the contacts should have performed to enter the journey.
5. The email actions the contacts should have performed are: delivered, opened, any link clicked, specific link clicked, replied, skipped, survey started and survey completed. These email actions will be displayed for the type of email selected to trigger the journey.
6. Choose to allow existing contacts who have qualified for this journey already to enter again.
7. Click **Save**.

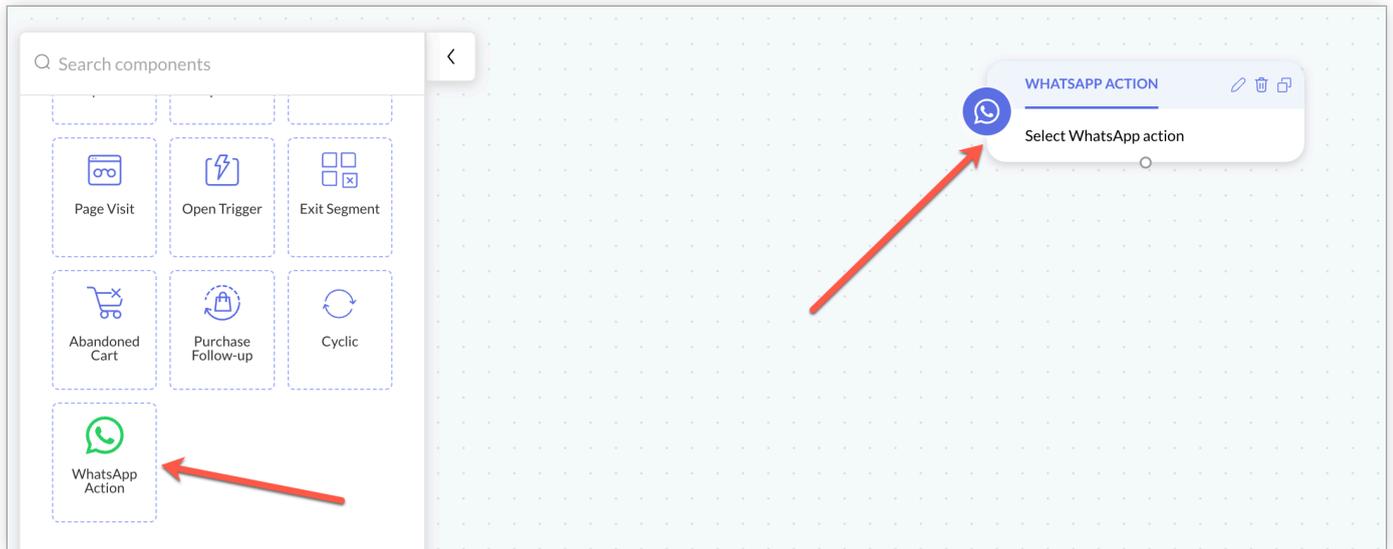
 Please note that this trigger cannot be configured for plain text campaigns as opens and clicks cannot be tracked for them.

## WhatsApp Action

This trigger starts a journey when a recipient performs an action on the WhatsApp message you've sent.

To configure this:

- Drag and drop the **WhatsApp action** trigger onto the journey builder.



- Click the **Edit** icon.
- Select either any message that contacts have received or a specific message or a journey message.

## WhatsApp action ✕

This component will be triggered when a contact performs the selected actions on WhatsApp messages.

- Select any WhatsApp message
- Select a specific WhatsApp message
- Select a journey WhatsApp message

Select action performed on the WhatsApp message

- Sent
- Delivered
- Failed
- Read
- Any link clicked
- Specific link clicked
- Replied
- Quick Replies
- Matches keyword ⓘ

- Select the action the contacts must have performed to enter the journey.

The WhatsApp actions that should have been performed are the following:

1. **Sent** - The message was successfully sent from your end
2. **Delivered** - The message was successfully delivered to the recipient's phone
3. **Failed** - The message has failed to reach the recipient's phone
4. **Read** - The recipient has read your message
5. **Any link clicked** - When a recipient clicks any of the links shared in the WhatsApp message
6. **Specific link clicked** - When a recipient clicks a specific link shared in the WhatsApp message
7. **Replied** - When a recipient has replied to your message
8. **Quick Replied** - When a recipient instantly responds with the pre-defined template message from the menu
9. **Matches keyword** - A message is triggered when it matches a keyword.

- Choose to allow existing contacts who have qualified for this journey already to enter again.
- Click **Save**.

## Note:

**Matches Keyword** - This can be activated when it finds the added keyword in the WhatsApp message replies. For e.g., if you add keyword offers, it'll try to match the WhatsApp message with the word offers, and try to trigger the new message.

**Exact match** - This is executed when a contact enters the exact phrase of specific words

**Contains** - This is executed when the contacts' entire message has the word.

## Date field

The date-field trigger is used to start a journey for contacts to enter at a specific date and time.

To configure this:

1. Drag and drop the **Date field** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Choose to use a custom date or a specific date. For a custom date you can select the date field you have already provided.
4. Choose to initiate the journey Anytime during the selected date, within a specific time or from a particular time and mention the time as required.
5. You can choose to trigger the journey before the scheduled date by mentioning how many days prior to the start date to initiate the journey.
6. You can also set additional criteria for contacts to meet to enter the journey.
7. Enable the option and enter the criteria, its modifier and its value.
8. Click **Save**.

## Criteria Match

This trigger starts a journey for those contacts who satisfy the criteria you've set.

To configure this:

1. Drag and drop the **Criteria match** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Enter the criteria, its modifier and its value.
4. Choose to allow existing contacts who have qualified for this journey already to enter again.
5. Click **Save**.

## Tag Assigned

This trigger starts a journey for those contacts who've been assigned with tag you select.

To configure this:

1. Drag and drop the **Tag assigned** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the tag.

4. Choose to allow existing contacts who have qualified for this journey already to enter again.
5. Click **Save**.

## Tag Removed

This trigger starts a journey for those contacts when the tag you've selected has been removed.

To configure this:

1. Drag and drop the **Tag removed** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the tag.
4. Click **Save**.

## Lead Stage Update

This trigger will start a journey for those contacts who reach the stage you specify.

To configure this:

1. Drag and drop the **Lead stage update** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the lead stage.
4. Choose to allow existing contacts who have qualified for this journey already to enter again.
5. Click **Save**.

## Lead Score Update

This trigger will start a journey for those contacts whose score meets the criteria you specify.

To configure this:

1. Drag and drop the **Lead score update** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the lead score criteria.
4. Choose to allow existing contacts who have qualified for this journey already to enter again.
5. Click **Save**.

## Goals Achieved

This trigger will start a journey for those contacts who've achieved the goals you've defined under Website analytics.

To configure this:

1. Drag and drop the **Goal achieved** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the goal.
4. Choose to allow existing contacts who have qualified for this journey already to enter again.

5. Click **Save**.

## Page Visit

This trigger will start a journey for those contacts who visit the website page you select.

To configure this:

1. Drag and drop the **Page visit** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the URL match and enter the URL value.
4. Select the criteria for the number of times the contacts should have visited the page.
5. Select the date the contacts should have visited the page.
6. Click **Save**.

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

## Open trigger

An open trigger can be used to start a journey when contacts are imported from another application using API keys.

To configure this:

1. Drag and drop the **Open trigger** onto the journey builder.
2. Click the **Edit** icon.
3. Click **Generate API Key** to use it to get contacts.
4. Click **Save**.

 **Note:** You can also associate other journeys, campaigns, and sign-up forms with this journey. Contacts from associated entities will enter this journey.

## Exited Segment

This trigger starts a journey for contacts who exit a selected segment.

To configure this:

1. Drag and drop the **Exit Segment** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Select the segment from which contacts may eventually be removed.
4. Click **Save**.

## Abandoned Cart

This trigger will start a journey for those contacts who have left products in their carts without purchasing them.

To configure this:

1. Drag and drop the **Abandoned cart** trigger onto the journey builder.
2. Click the **Edit** icon. The store name will be displayed for which you want to configure this trigger.
3. Select any product or a specific product.
4. Select criteria for the cart value and enter the amount.
5. You can also choose to set criteria to decide which contacts can enter the journey.
6. Enter the criteria, it's modifier and its value.
7. Click **Save**.

## Purchase Follow-up

This trigger will start a journey for those contacts who have purchased products from your connect store.

To configure this:

1. Drag and drop the **Purchase follow-up** trigger onto the journey builder.
2. Click the **Edit** icon. The store name will be displayed for which you want to configure this trigger.
3. Select any product or a specific product.
4. Select criteria for the purchased value and enter the amount.
5. You can also choose to set criteria to decide which contacts can enter the journey.
6. Enter the criteria, it's modifier and its value.
7. Click **Save**.

## Cyclic

This trigger starts a journey for contacts who meet the specified criteria on your mailing lists at regular intervals.

You can schedule the journey to trigger daily, weekly, monthly, or yearly.

To configure this:

1. Drag and drop the **Cyclic** trigger onto the journey builder.
2. Click the **Edit** icon.
3. Set the repeat frequency - Choose to trigger the journey daily, weekly, monthly, or yearly. Specify the exact time for the trigger to execute.
4. Define the criteria for contacts to enter the journey - Set conditions based on contact properties and use modifiers to refine the condition. Enter the value that should match the selected criteria.
5. Click **Save**.

## Manage Trigger components

You can edit, delete and clone triggers in your builder for journeys that are not activated. Let's take a look at how each action can be performed below:

To edit a trigger in draft:

1. From the *Navigation* toolbar, select **Journeys** and click **View Journey**.

2. Click the journey you wish to edit the trigger for from the journey list view.
3. Click the **Edit** icon on the desired trigger component.
4. Edit the trigger and Click **Save**.

To clone a trigger in draft:

1. From the *Navigation* toolbar, select **Journeys** and click **View Journey**.
2. Click the journey you wish to edit the trigger for from the journey list view.
3. Click the **Clone** icon on the desired trigger component.
4. A clone of the trigger will automatically appear on your builder.

To delete a trigger in draft:

1. From the *Navigation* toolbar, select **Journeys** and click **View Journey**.
2. Click the journey you wish to edit the trigger for from the journey list view.
3. Click the **Delete** icon on the desired trigger component.
4. The trigger will be deleted from your builder.

 **Note** : You cannot edit, clone or delete a trigger for an activated journey.