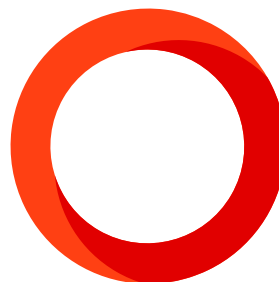
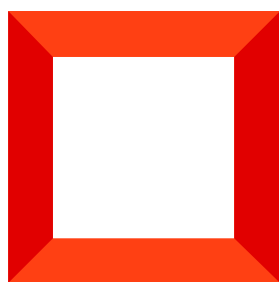
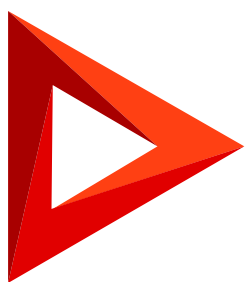


# Campaign elements

Campaign element reference

Version 8.0



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The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.











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# Campaign element reference


PRODUCTS: **MARKETING**

Campaign diagrams consist of campaign elements connected with flows.

Campaign elements	Status details
	<p><a href="#">Marketing email</a></p> <p>Sends a trigger email to campaign participants who are transferred via the element's incoming flows.</p>
	<p><a href="#">Adding event audience</a></p> <p>Adds campaign audience from a dynamic or static <a href="#">folder</a>, as well as from a custom <a href="#">filter</a>.</p>
	<p><a href="#">Triggered adding</a></p> <p>The element adds participants to the campaign audience automatically, on a trigger.</p>
	<p><a href="#">Add from event</a></p> <p>Adds the audience of the event to the campaign's participant list.</p>
	<p><a href="#">Add from landing</a></p> <p>Adds participants to the campaign when a web form is filled out on a landing page.</p>
	<p><a href="#">Add to event</a></p> <p>Adds participants from the campaign to an event.</p>
	<p><a href="#">Add data</a></p> <p>Creates new Creatio records based on the data of the campaign's participants.</p>
	<p><a href="#">Modify data</a></p> <p>Modifies existing records.</p>
	<p><a href="#">Eliminate duplicates</a></p> <p>Validates the campaign's audience using the specified rules and suspends the further participation of duplicates.</p>
	<p><a href="#">Random split</a></p> <p>Advances participants to different outgoing flows randomly. For example, use it for A/B testing.</p>

	testing.
	<p><a href="#">Landing page</a></p> <p>Integrates landing pages and campaigns.</p>
	<p><a href="#">Timer</a></p> <p>Launches a campaign or activates the following campaign element at a specific time, either once or regularly.</p>
	<p><a href="#">Exit from campaign</a></p> <p>The element enables participants who correspond to the specified filter conditions and those transferred to this element by incoming flows to exit the campaign.</p>


## The [ *Marketing email* ] element

The [ *Marketing email* ]  element lets you use trigger emails (created in the [ *Email* ] section) in your campaigns.

The execution time of this step depends on the configured flows.

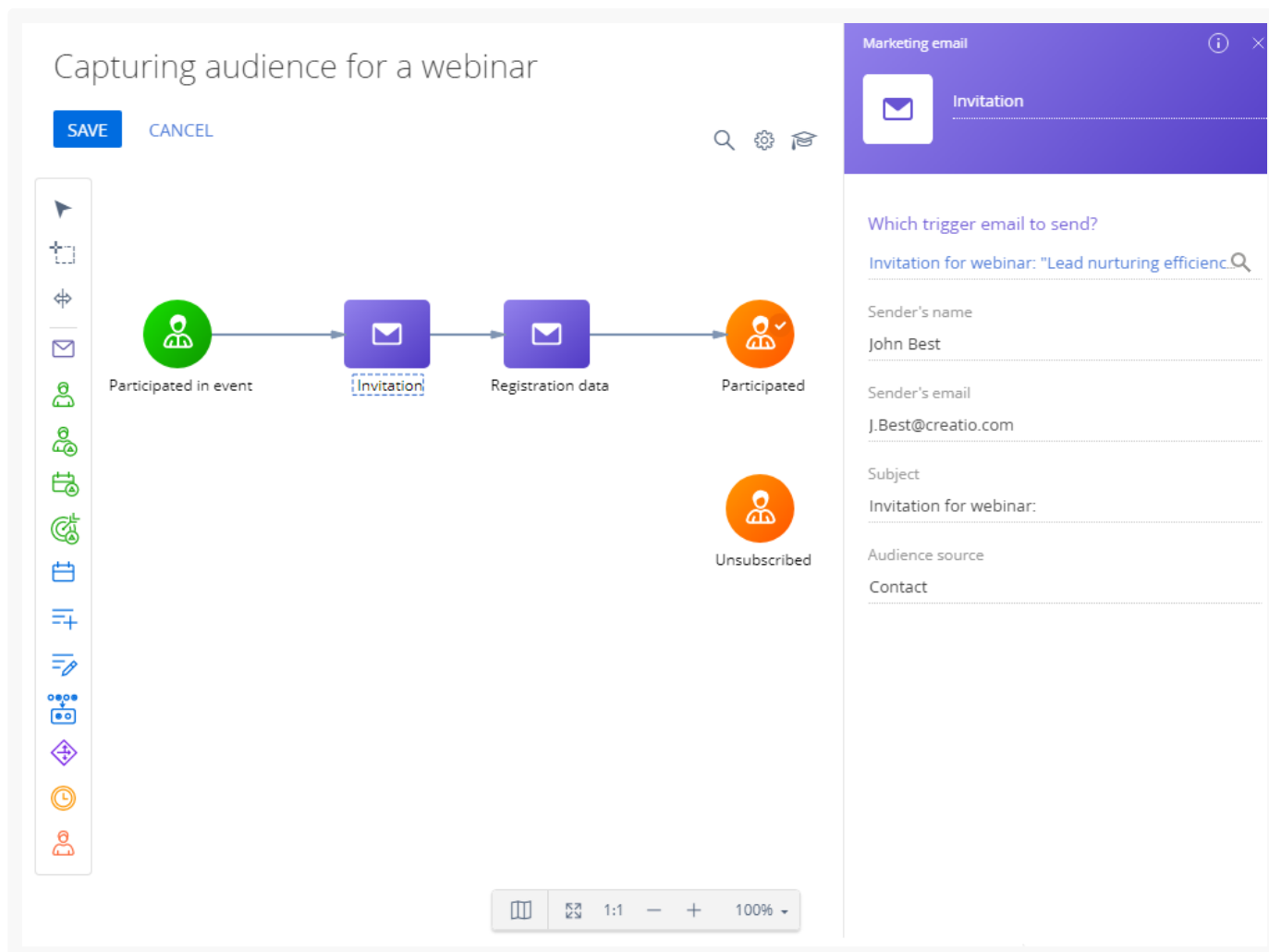
**Note.** You cannot use bulk emails in a marketing campaign.

To set up the [ *Marketing email* ] element:

1. Drag the  item to the diagram.
2. Select a trigger email from the [ *Email* ] section to send to the email audience in the [ *Which trigger email to send?* ] field (Fig. 1).

The other fields are locked and populated with the value specified upon the [creation of the trigger email](#).

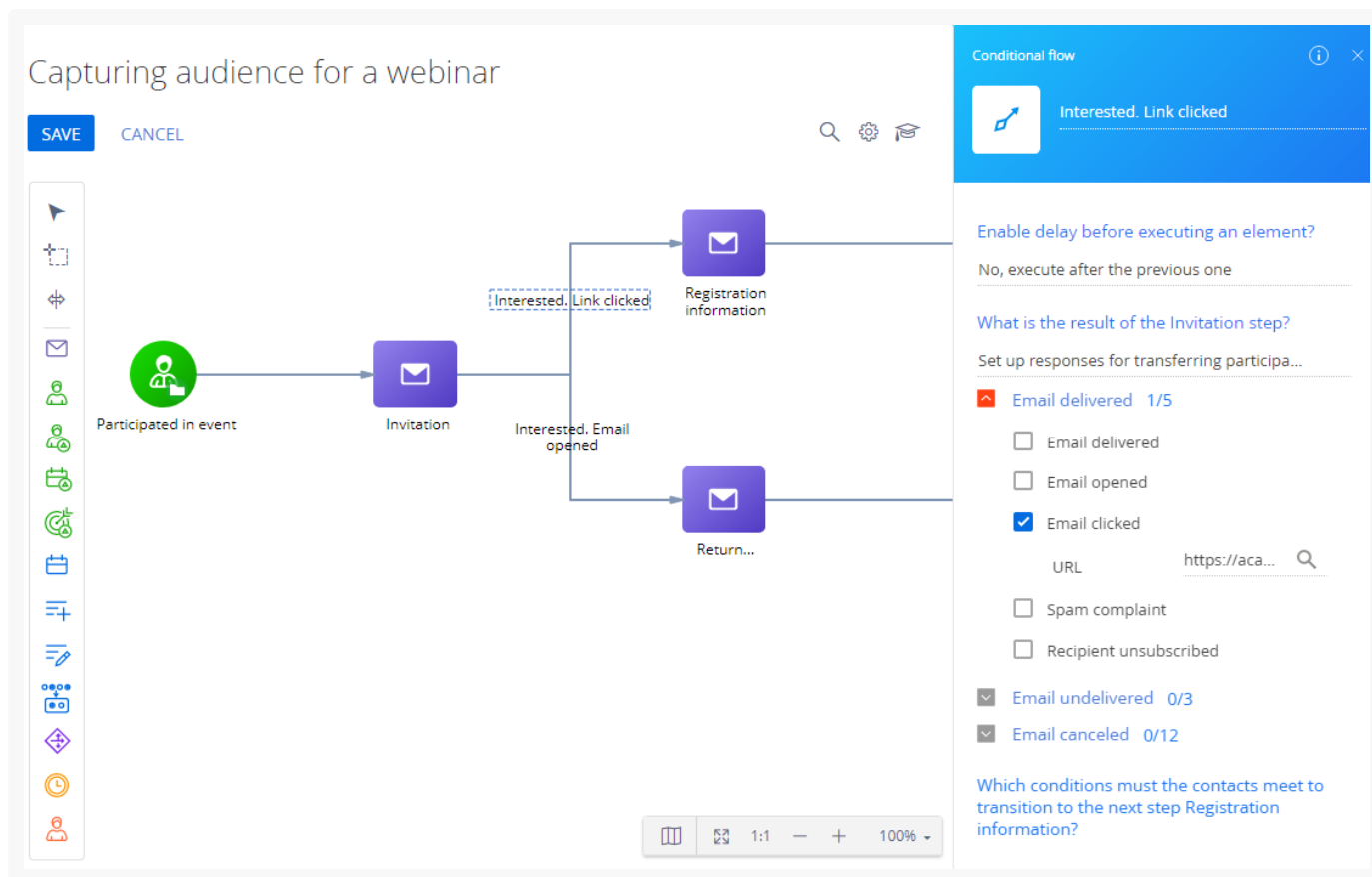
Fig. 1 Set up the [ *Marketing email* ] element



3. Select email responses to advance the participants down the outgoing flows if available. You can transfer participants down a flow unconditionally or only advance those participants whose responses match the selected options in the flow's properties area.
4. Select one or several links from the email template (Fig. 2) when selecting the [ *Email clicked* ] response. Only the participants who click the selected links will proceed down the condition flow.

**Attention.** If no link list is specified, clicking any link will result in proceeding down the flow.

Fig. 2 Transition based on the email response




If the trigger email template has [dynamic content](#), Creatio will treat all URLs in each replica as unique URLs. When you fill out the [ *Redirection URL* ] field for a trigger email with dynamic content, you will see the list of links from all template replicas. Select all available link variants to enable recipients of each replica to go down the condition flow.


Delay countdown starts as soon as the participant reaches the element. For example, if you set a 3-day transition delay for the “Email opened” condition, all contacts who open the email within 3 days will move down this conditional flow.

**Attention.** If you select the “Email clicked” transition option and later change the link in the email template after the start of the campaign, replace the old link with the new one in the “URL” field.

## The [ *Add audience* ] element

The [ *Add audience* ] element  adds campaign participants from a dynamic or static folder or using the specified filter settings (Fig. 3). You can add an unlimited number of [ *Add audience* ] elements to the campaign diagram. The audience always consists of contacts. Creatio stores associated entities, such as leads, accounts, or orders, separately.

To set up the [ *Add audience* ] element:

1. Drag the  element to the diagram.
2. Select the object for importing the campaign audience in the [ *Select an object (entity) that holds the campaign audience data* ] field. For example, you can import leads. In this case, the connected contacts will be imported

to the campaign audience. The list of available entities is specified in the [\[ Entity settings for campaign signal \]](#) lookup.

3. Select “Folder” in the *[ Specify which records will be converted to the campaign audience ]* field to add contacts from a pre-configured group. Select “Filter” to filter records using filter conditions.
  - a. If you select “Folder,” specify the folder name in the *[ Which folder to add participants from? ]* field.
  - b. If you select “Filter,” set up the filtering conditions. For example, filter leads with a certain need maturity who live in a specific city.
4. Select the *[ Re-entering the campaign ]* checkbox to enable participants to go through the campaign multiple times. By default, the participants from the specified folder do not re-enter the campaign after they exit it. You can specify the number of days before the participants can re-enter the campaign in the *[ Quantity of days before next campaign entrance ]* field. For example, you can set up an NPS campaign to launch every 90 days. The countdown starts the moment the participant is added.

The participants who have not yet completed the campaign and are set to re-enter again will receive the “Suspended” status. Learn more: [Re-entering the campaign](#).

Fig. 3 Set up the *[ Add audience ]* element

The screenshot displays the 'Webinar' campaign setup interface. On the left, a vertical toolbar contains various icons for campaign elements. The main workspace shows a flow diagram with the following steps: a green circle icon labeled 'Participated in event' (highlighted with a dashed blue box), followed by a purple square icon labeled 'Invitation', then a purple square icon labeled 'Registration data', and finally an orange circle icon labeled 'Participated'. Arrows connect these steps, with the text 'Interested. Link clicked' appearing between the 'Invitation' and 'Registration data' steps. Below the flow diagram, there are icons for 'Unsubscribed' and 'Participated'. On the right side, a green panel titled 'Add audience' is open. It contains a section 'Select an object (entity) that holds the campaign audience data' with 'Lead' selected. Below this, a section 'Specify which records will be converted to the campaign audience' shows 'Records that match a custom filter'. Under 'Actions', there are two conditions: 'City = Sydney' and 'Need maturity = Discovered; Sales-ready; Suspected', both checked. An 'AND' checkbox is also present. Below the conditions, there is a '+ Add condition' button. In the 'Element Settings' section, the 'Re-entering campaign' checkbox is checked, and the 'Quantity of days before next campaign entrance' is set to 10.

## Re-entering the campaign

You can select the *[ Recurring entrance ]* checkbox in the *[ Participation rules ]* group when setting up the properties of the *[ Triggered adding ]* element (Fig. 4).

Fig. 4 Participation conditions upon a repeated triggered adding

Triggered adding

Triggered adding

Add participants when this object is added/updated

Lead

Which event should activate the trigger?

Record added

The added record must meet filter conditions

Actions

☒ AND

☒ City = New Plymouth

+ Add condition

Participation rules

☒ Recurring entrance

**The [ *Recurring entrance* ] checkbox is selected:** when a participant is re-added from a trigger, their current campaign progress will be suspended. Use this option to make the contact start the campaign anew after re-adding. For example, the contact can be sent an introductory email upon each lead registration.

**The [ *Recurring entrance* ] checkbox is cleared:** when a participant is re-added, the campaign fragment before the delay will be executed. The contact will proceed their transition through the campaign. You can use this feature to send confirmation emails (transaction emails). In this case, the contact will receive a corresponding email after a triggered adding of a lead and continue to transition through the campaign steps without restarting. Otherwise, the contact will change their current step, and a logical error will happen.


## Add objects to the [ *Entity settings for campaign signal* ] lookup

You can edit the list of **available objects** in the [ *Entity settings for campaign signal* ] lookup (Fig. 5).

Fig. 5 [ *Entity settings for campaign signal* ] lookup

Lookups

What can I do for you? >


  
7.17.3.2153

VIEW ▾

NEW CLOSE ACTIONS ▾

Entity settings for campaign signal

Filters/folders ▾

Caption	Entity object	Path to Contact
Account	Account	PrimaryContact.Id
Contact	Contact	Id
Opportunity	Opportunity	Contact.Id
Opportunity product	Opportunity product	Opportunity.Contact.Id
Event participant	Event participant	Contact.Id
Product in lead	Product in lead	Lead.QualifiedContact.Id
Order	Order	Contact.Id
Product in order	Product in order	Order.Contact.Id
Lead	Lead	QualifiedContact.Id
Case	Case	Contact.Id

To add a new object:



1. Click  in the main Creatio application.
2. Click [ Lookups ] in the [ System setup ] block.
3. Open the content of the [ Entity settings for campaign signal ] lookup
4. Click [ New ].
5. Fill out the values of the new lookup record:
  - a. Specify the name of the object in the [ Caption ] column. This caption is displayed in the [ Add participants when this object is added/updated ] field in the setup area of the [ Triggered adding ] element.
  - b. Specify the name of the object in the database in the [ Object ] column. You can use the [Section Wizard](#) or [Detail Wizard](#) to look up the object (Fig. 6).

Fig. 6 Object name in the Section Wizard

- c. Specify the name of the column which connects the necessary object to the “Contact” object in the [ *Path to contact object* ] column.

## The [ *Triggered adding* ] element

The [ *Triggered adding* ] start element  adds participants to the campaign audience automatically, on a trigger. The audience always consists of contacts. Creatio stores associated entities, such as leads, accounts, or orders, separately. For example, if you select the “Lead” record type in the element, Creatio adds the contact specified in the [lead profile](#). The specifics for the connection between the added participant and the trigger record are specified for each object individually.


Participants are added to the campaign as soon as the trigger fires. The audience list on the [ *Participants* ] tab is updated when the campaign is launched (manually or automatically).

Triggers fire after the following events:

- **Existing record modified.** Creatio adds participants to the campaign audience whenever an existing record is updated (modified) in a specific section. Tracked fields are specified during the element setup. The updated record must meet the filter conditions.
- **New record added.** Creatio adds participants to the campaign audience whenever a new record is added to a specific section, detail, or lookup. The newly added record must meet the filter conditions.

## The “Record modified” trigger event

To set up the [ *Triggered adding* ] element for a record modification (Fig. 7):

1. Drag the  item to the diagram.
2. Select the object whose record will trigger adding a new campaign participant in the [ *Add participants when this object is added/updated* ] field. The list of available field values is specified in the [\[ Entity settings for campaign signal \]](#) lookup. For example, to add campaign participants whenever a lead record is modified (advances to the “Nurturing” stage), select the “Lead” object. All leads added to the campaign must be connected to a contact. Use the [\[ Entity settings for campaign signal \]](#) lookup to map the contact fields.
3. Select “Record changing” in the [ *What event should happen?* ] field and fill out the fields that appear.
4. Specify the columns whose values must be modified for the “Record updated” event to occur in the [ *Trigger*

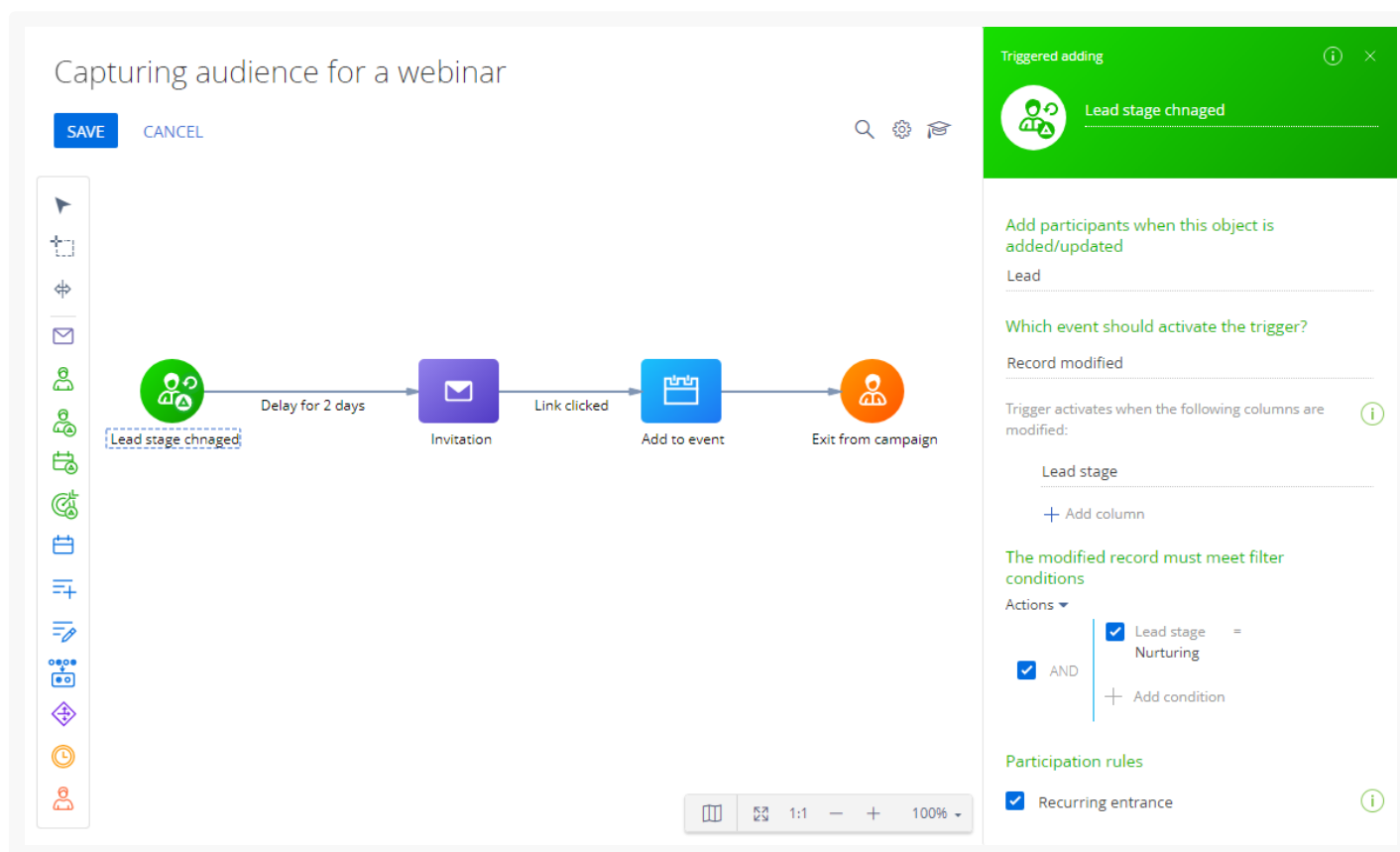
activates when the following columns are modified ] field. For example, to add participants to the campaign if the lead stage is changed, select the “Lead stage” column.

- Specify the conditions the record must meet to trigger the element in the [ *The modified record must meet filter conditions* ] field. For example, to add participants to the campaign once the lead stage is changed to “Nurturing,” set the “Lead stage = Nurturing” filter. If you do not specify the filter, any change in the specified columns will trigger adding new campaign participants.
- Select the [ *Re-entering the campaign* ] checkbox to enable participants to go through the campaign multiple times. By default, the participants from the specified folder do not re-enter the campaign after they exit it. You can specify the number of days before the participants can re-enter the campaign in the [ *Quantity of days before next campaign entrance* ] field. For example, you can set up an NPS campaign to launch every 90 days. The countdown starts the moment the participant is added.

The participants who have not yet completed the campaign and are set to re-enter again will receive the “Suspended” status. Learn more: [Re-entering the campaign](#).


As a result, each time a new lead reaches the [ *Nurturing* ] stage, the [ *Triggered adding* ] element will add the connected contact to the campaign audience.

Fig. 7 Set up the “Record modified” event



## The “Record added” trigger event

To set up the [ *Triggered adding* ] element for adding a record (Fig. 8):

- Drag the  element to the diagram.
- Select the object whose record will trigger adding a new campaign participant in the [ *Add participants when*

*this object is added/updated* ] field. The list of available field values is specified in the [\[ Entity settings for campaign signal \]](#) lookup. For example, to add campaign participants when adding an order record, select the “Order” entity. All orders added to the campaign must be connected to a contact. Use the [\[ Entity settings for campaign signal \]](#) lookup to map the contact fields.

3. Select “Add record” in the *[ What event should happen? ]* field and fill out the fields that appear.
4. Specify the conditions the record must meet to trigger the element in the *[ The added record must meet filter conditions ]* field. For example, to add campaign audience when adding a new order on the website or in the mobile app only, set the “Order channel = Website; Mobile application” filter. Without the filter, any new orders will trigger the adding of new campaign participants.
5. Select the *[ Re-entering the campaign ]* checkbox to enable participants to go through the campaign multiple times. By default, the participants from the specified folder do not re-enter the campaign after they exit it. You can specify the number of days before the participants can re-enter the campaign in the *[ Quantity of days before next campaign entrance ]* field. For example, you can set up an NPS campaign to launch every 90 days. The countdown starts the moment the participant is added.

The participants who have not yet completed the campaign and are set to re-enter again will receive the “Suspended” status. Learn more: [Re-entering the campaign](#).

As a result, each time a new order is created on the site or in the mobile app, the *[ Triggered adding ]* element will add the connected contact to the campaign audience.

Fig. 8 Set up the “Record added” trigger event


## Specifics of the [ *Triggered adding* ] element

- As soon as a new participant is added to the campaign, they move through the campaign steps until they reach an element or flow with a configured delay.

This occurs even if the [ *Triggered adding* ] element adds the same contact as the campaign participant several times (e. g., if two different leads with the same contact trigger the element at different times).

- Whenever such a participant goes down a [conditional flow](#) for the first time, any subsequent instances of the same participant will not be able to go down that conditional flow. If a campaign element must not execute for a participant more than once, place a conditional flow between it and the [ *Triggered adding* ] element. For example, the same participant will not be able to go down the “Wait 2 days” conditional flow twice (Fig. 7).

## The [ *Add from event* ] element

Use the [ *Add from event* ] campaign element  to integrate [event](#) audiences with your campaigns. The [ *Add from event* ] element is triggered when new records are added to the list of event participants (Fig. 9). This element works similarly to a [ *Triggered adding* ] element configured for adding participants from an event

audience.

Participants are added to the campaign as soon as they are added as the event's participants. The audience list on the [ *Participants* ] tab is updated when the campaign is launched (manually or automatically).

To set up the [ *Add from event* ] element:


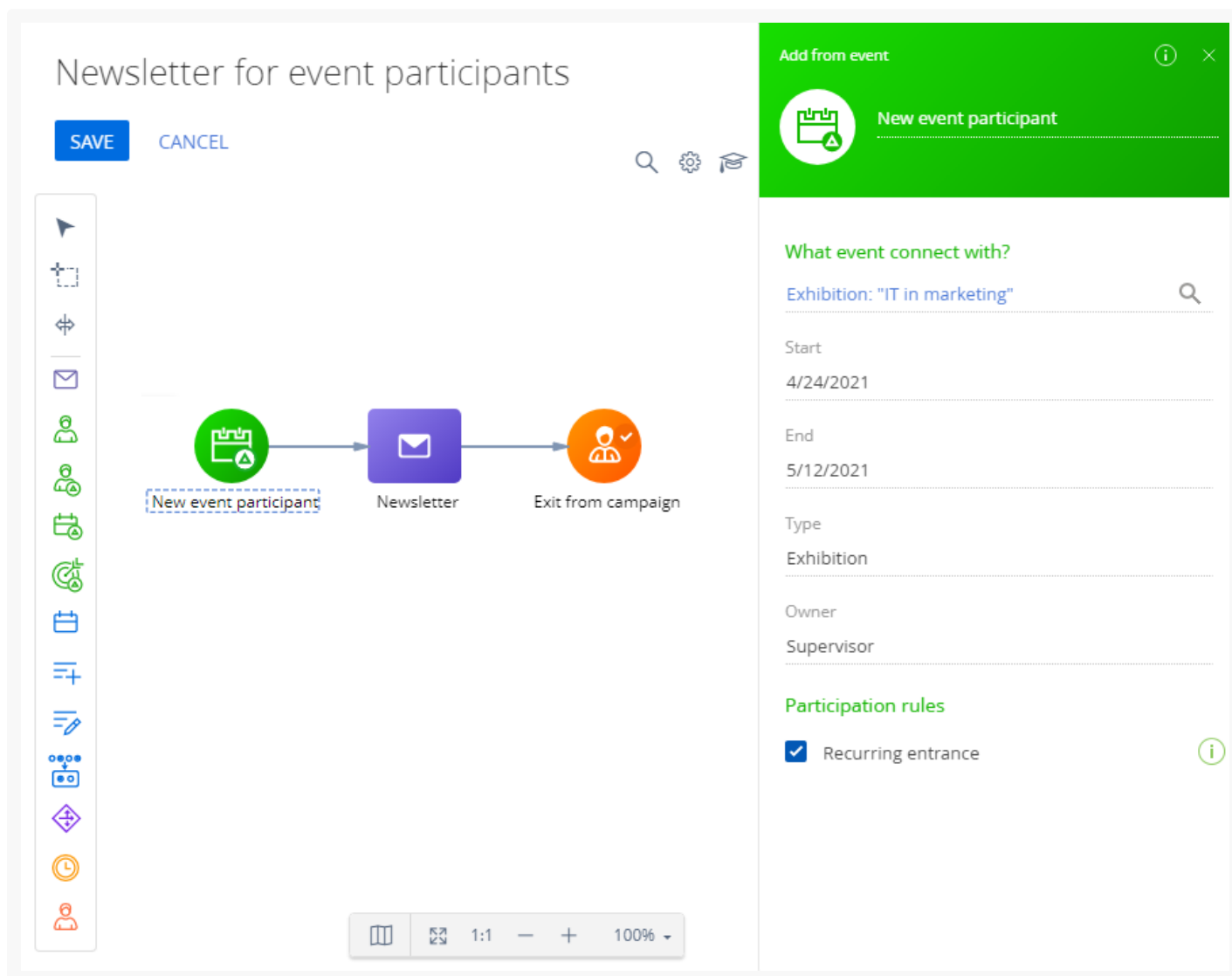
1. Drag the  element to the diagram.
2. Use the [ *What event connect with?* ] field to specify the event whose audience will be added to the campaign audience. A contact added to the [ *Contacts* ] detail on the [ *Audience* ] tab of the event will also be added to the campaign audience. After you fill out the parameter, the properties area will display the event's dates, type, and owner. These fields are locked and populated with values specified upon the [creation of the event](#).
3. Select the [ *Recurring entrance* ] checkbox to suspend the execution of the campaign's flow and start the campaign from step one when the contact is re-added to the event participant list. Learn more: [Re-entering the campaign](#).

Fig. 9 Set up the [ *Add from event* ] element




The screenshot displays the 'Newsletter for event participants' campaign setup interface. On the left, a vertical toolbar contains various icons for campaign elements. The main workspace shows a flow diagram with three elements: 'New event participant' (green circle with a calendar icon), 'Newsletter' (purple square with an envelope icon), and 'Exit from campaign' (orange circle with a person icon). The 'New event participant' element is selected, and its configuration panel is open on the right.

The configuration panel for 'Add from event' includes the following fields and options:

- What event connect with?**: A search field with the value 'Exhibition: "IT in marketing"'. A magnifying glass icon is on the right.
- Start**: 4/24/2021
- End**: 5/12/2021
- Type**: Exhibition
- Owner**: (empty field)
- Supervisor**: (empty field)
- Participation rules**: A section with a checked checkbox for 'Recurring entrance' and an information icon (i) on the right.

At the bottom of the interface, there are zoom controls showing '1:1' and '100%'.

## The [ *Add from landing* ] element

Use the [ *Add from landing* ] start element  to integrate [landing pages](#) and campaigns (Fig. 10).

The [ *Add from landing* ] element is triggered when a web form is filled out on a landing page. This element works similarly to a [ *Triggered adding* ] element configured for adding participants when creating a connected object. A contact will be added to the list of campaign participants as soon as a web form is filled out on a landing page. The audience list on the [ *Participants* ] tab is updated when the campaign is launched (manually or automatically).

To set up the [ *Add from event* ] element:


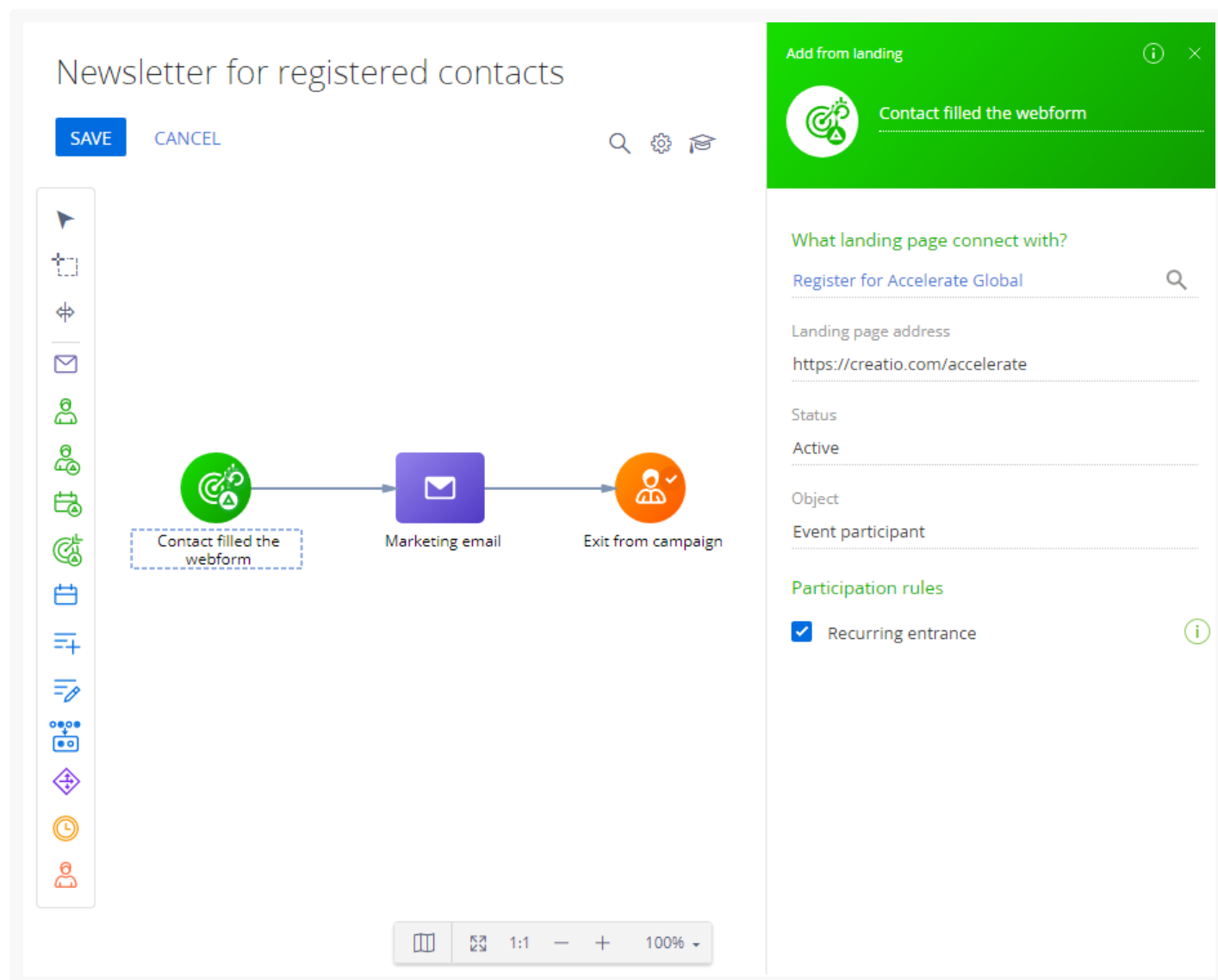
1. Drag the  element to the diagram.
2. Select one of the previously added landing pages in the [ *What landing page to connect with?* ] field. After you fill out the parameter, the element's properties area will display the landing page URL, status, and the Creatio object bound to the landing page. These fields are locked and populated with the value specified upon the [creation of the landing page](#).
3. Select the [ *Recurring entrance* ] checkbox to suspend the execution of the campaign's flow and start the campaign from step one when the contact is re-added to the event participant list. Learn more: [Re-entering the campaign](#).

Fig. 10 Set up the [ *Add from landing* ] element



The screenshot displays the Creatio campaign editor interface. The main canvas shows a campaign flow diagram titled "Newsletter for registered contacts". The flow starts with a green circular element labeled "Contact filled the webform", followed by a purple square element labeled "Marketing email", and ends with an orange circular element labeled "Exit from campaign". A vertical toolbar on the left contains various icons for adding elements. On the right, a green sidebar titled "Add from landing" provides configuration options. It includes a search field for "What landing page connect with?" with the result "Register for Accelerate Global". Below this, the "Landing page address" is set to "https://creatio.com/accelerate". The "Status" is "Active", and the "Object" is "Event participant". Under "Participation rules", the "Recurring entrance" checkbox is checked.

You can set up the filtering by the object specified in the properties of the [ *Add from landing* ] element when moving to the next campaign element. For example, as displayed on Fig. 11.

Fig. 11 Set up a conditional flow

The screenshot shows a campaign editor interface for a campaign titled "Newsletter for registered contacts". The main workspace displays a flow diagram with three steps: "Contact registered via webform" (green circle), "Invitation" (purple square), and "Exit from campaign" (orange circle). A dashed box with a funnel icon is positioned between the "Invitation" and "Exit from campaign" steps, indicating a conditional flow. A sidebar on the left contains various campaign elements. A right-hand panel titled "Conditional flow" is open, showing configuration options. The "Which object to use for participant filtration?" section is highlighted with a red box, showing "Lead" as the selected object. Below this, the "Actions" section shows a condition: "Need maturity = Sales-ready; Suspected; Discovered" with a checked "AND" operator and an "Add condition" button.

## The [ *Add to event* ] element

The [ *Add to event* ] element  adds campaign participants to an event (Fig. 12).

To set up the [ *Add to event* ] element:


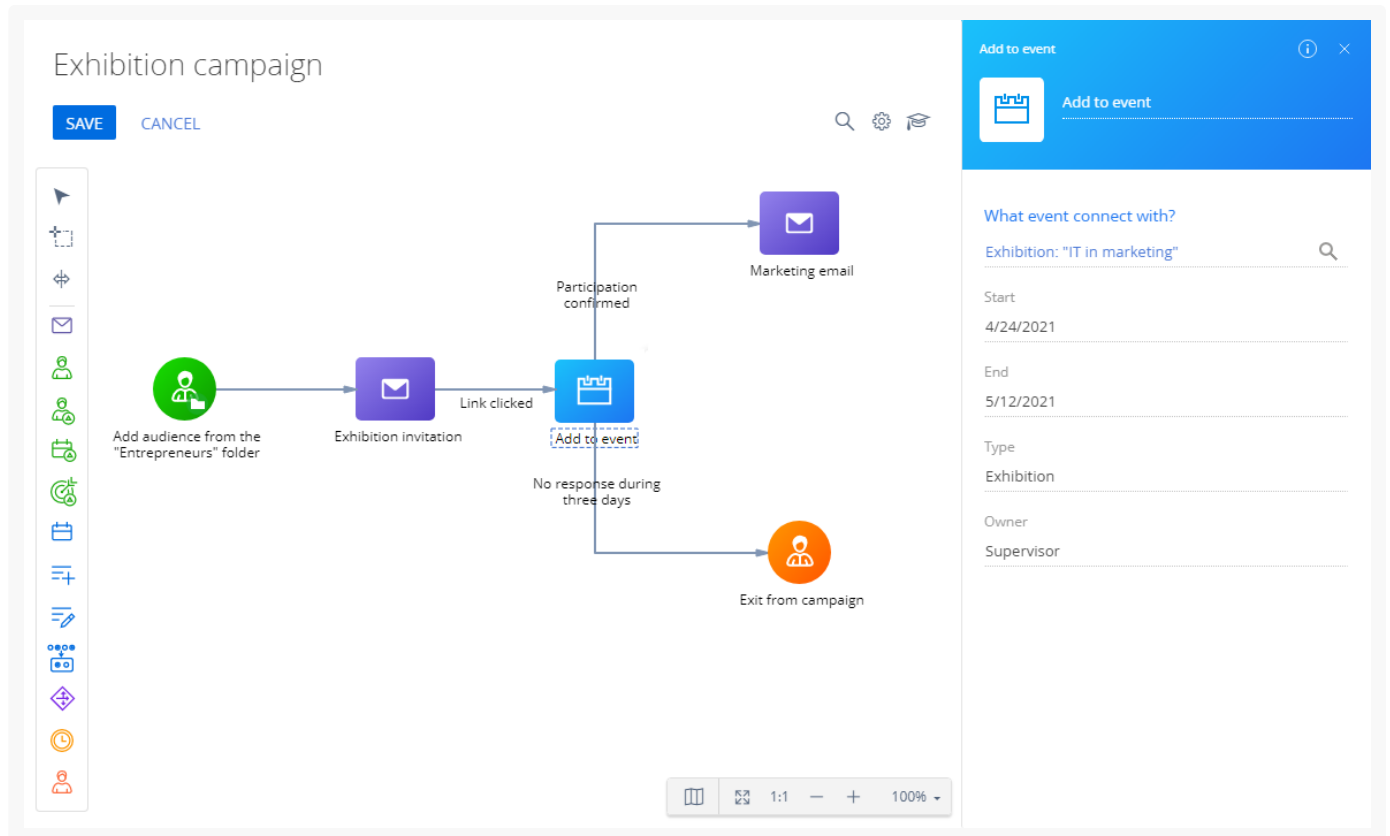
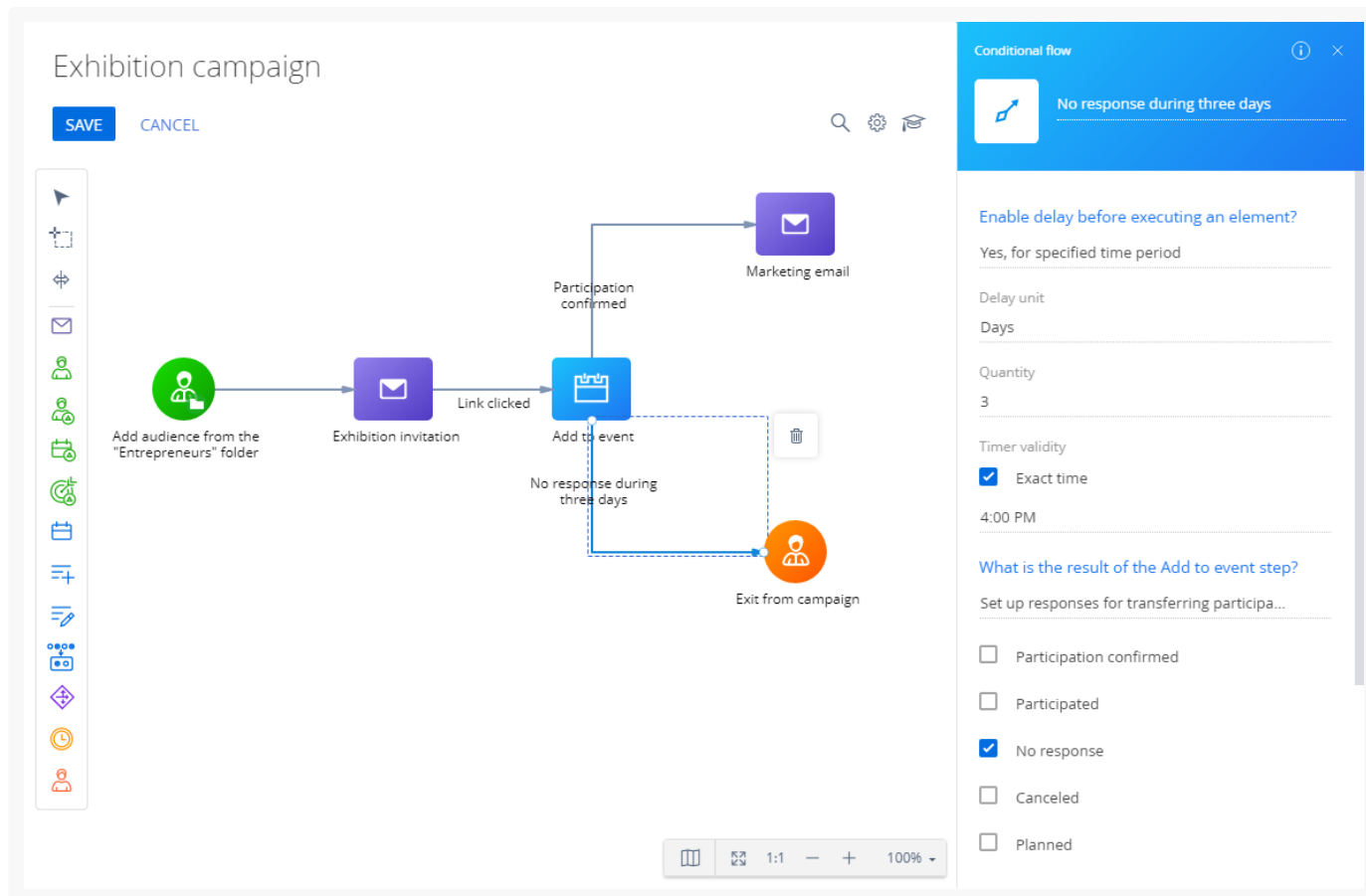
1. Drag the  element to the diagram.
2. Use the [ *What event connect with?* ] field to select the event whose audience will be populated with new contacts from the campaign audience. After you fill out the parameter, the properties area will display the event's dates, type, and owner. These fields are locked and populated with the value specified upon the [creation of the event](#).

Fig. 12 Set up the [ *Add to event* ] element



3. Select email responses for the transition of the participants if the element has outgoing conditional flows. Possible audience responses will be available in the condition list (Fig. 13).


Fig. 13 Use the [ Add to event ] element with conditional flows




This way, only the participants whose campaign responses correspond to those selected in the conditional flow will move down that flow. The campaign will take into account the responses available at the time of movement for participants who have not moved yet. For example, if you set a 3-day transition delay for the "No response" condition, all contacts who have the "No response" response by the end of the 3-day period will move down this conditional flow.

**Note.** You can add custom event participant responses in the [ *Status of participation* ] lookup.

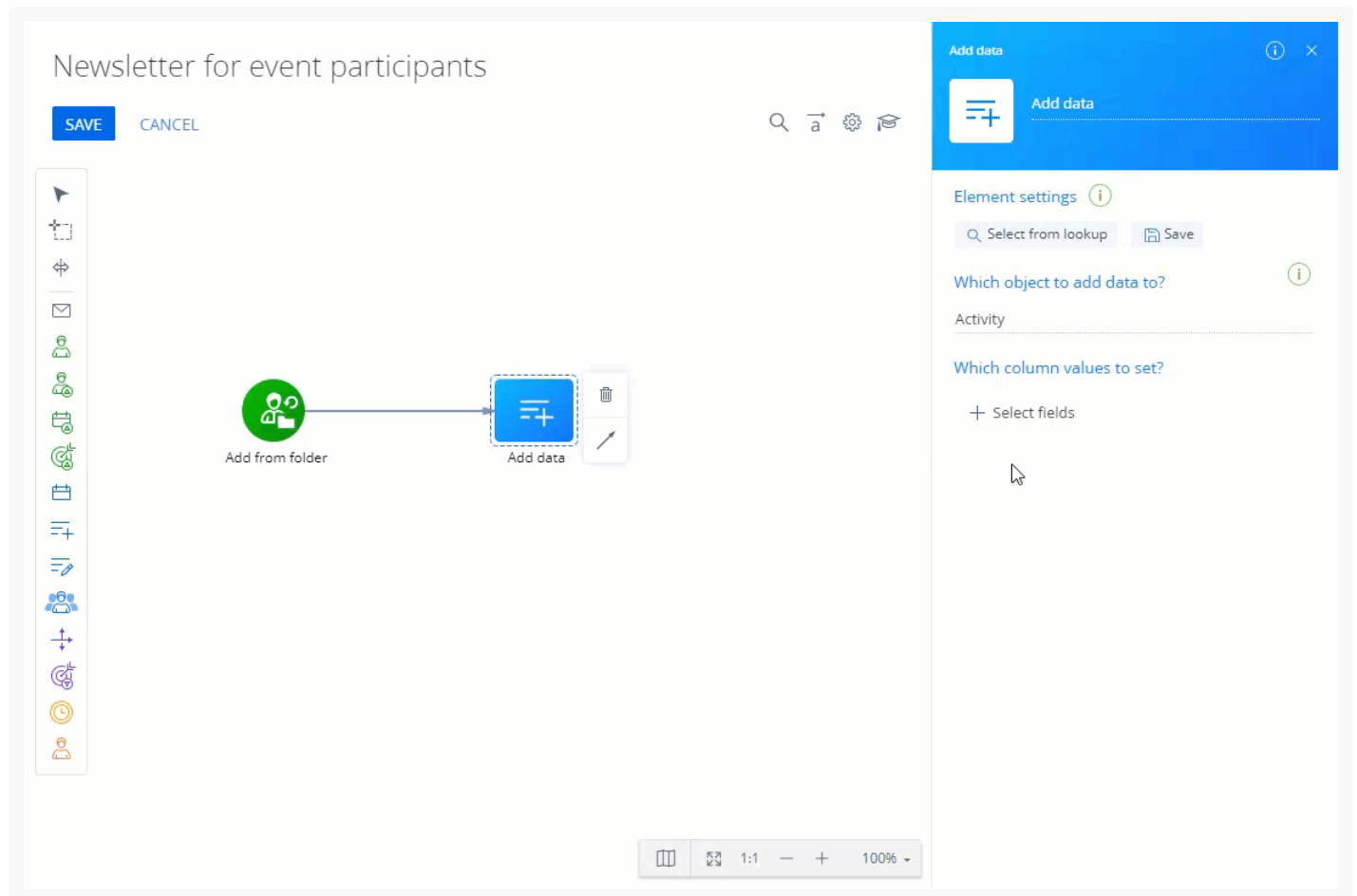
## The [ *Add data* ] element

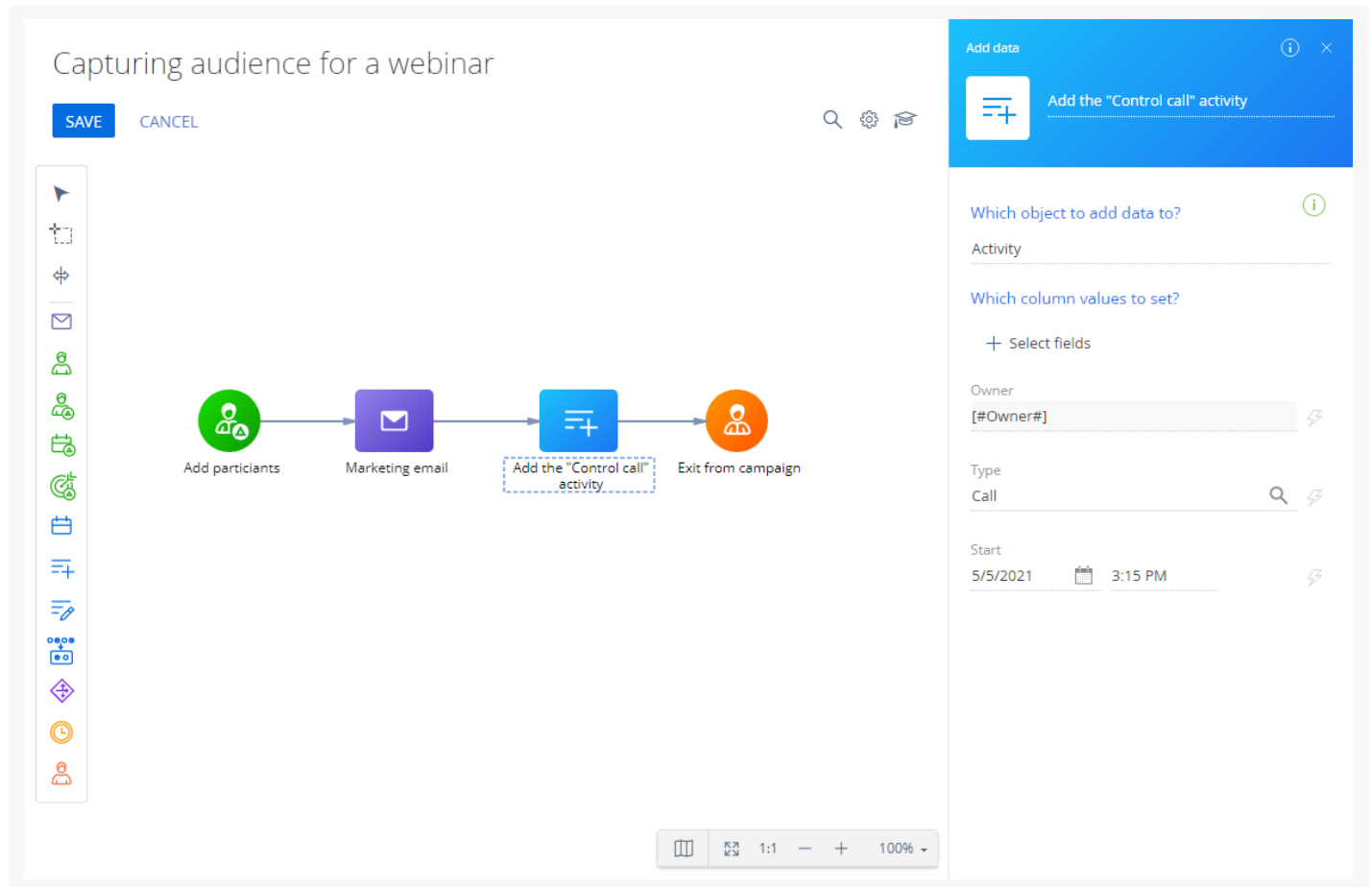
The [ *Add data* ] element  adds new Creatio records and populates them with data from the participant's contact record or any records directly connected to the participant's contact record (Fig. 15).

To set up the [ *Add data* ] element:

1. Drag the  element to the diagram.
2. Select the target object (section, detail, or lookup) in the [ *Which object to add data to?* ] field. For example, to add a new activity, select the "Activity" object.
3. Click [ + ] in the [ *Which column values to set?* ] area and select the fields to populate for the newly added record. For example, to connect the new activity to the participant's account, select the "Account" field. All selected fields will appear in the element properties area. By default, the element lets you add data to the following system objects: "Call," "Activity," "Contact in folder," and "Lead". You can [configure](#) the list of **available objects** in the [ *"Add data" element - allowed objects* ] lookup.

4. Use the [ *Which column values to set?* ] area to specify how each of the fields will be populated in the record that the [ *Add data* ] element will create. All required fields in the new record must be populated. The following methods are available:
- **Manual input.** You can specify the field value manually, using the same controls that are available for the same type of field on a regular record page: enter the values of text and numeric fields, select checkboxes for boolean fields, select the value from lookups for lookup fields, and enter specific dates in the date fields. For example, to create an activity of the “Call” type, select “Call” in the [ *Type* ] field.
  - **Out-of-the-box macro.** Certain columns have ready-made macros. For example, select the “Date and time” macro in the “Start” field to populate the field with the date and time when the new record was added.
  - **Custom macro.** Use custom macros to populate the fields of the updated record with values from the participant's contact record or records in other objects that are connected to the Contact object. For example, you can populate the “Owner” field of the new activity record with the same value as the one specified in the “Owner” field for the campaign participant's contact (Fig. 14).

Fig. 14 Mapping the [ *Owner* ] fieldFig. 15 Set up the [ *Add data* ] element



## Add objects to the [ "Add data" element - allowed objects ] lookup

Edit the list of **available objects** in the [ "Add data" element - allowed objects ] lookup (Fig. 16) to add data using the [ Add data ] element.

Fig. 16 [ "Add data" element - allowed objects ] lookup

Lookups

What can I do for you? >

NEW CLOSE ACTIONS

VIEW

"Add data" element - allowed objects

Filters/folders

Caption	Object	Path to Contact col...	Allowed columns	Restricted columns
Account	Account	PrimaryContact	*	Owner
Activity	Activity	Contact	*	Category
Lead	Lead	QualifiedContact	*	
Contact in folder	ContactInFolder	Contact	*	
Call	Call	Contact	*	

To add a new object:


1. Click  in the main Creatio application.
2. Click [ Lookups ] in the [ System setup ] block.
3. Open the content of the [ "Add data" element - allowed objects ] lookup.
4. Click [ New ].
5. Fill out the values of the new lookup record:
  - a. Specify the name of the object in the [ Caption ] column. This name is displayed in the [ Which object to add data to? ] field.
  - b. Specify the name of the object in the database in the [ Object ] column. You can use the [Section Wizard](#) or [Detail Wizard](#) to look up the object (Fig. 17).


Fig. 17 Object name in the Section Wizard

Leads: Section

SAVE CANCEL

< SECTION CASES BUSINESS PROCESSES >

Section settings


 Title\*  
Leads

Code\*  
Lead

☒ Indexing for full-text search

- c. Specify the name of the column that connects the necessary object to the “Contact” object in the [ *Path to contact object* ] column. The column is usually named “Contact.”
- d. Specify the list of available columns as comma-separated values in the [ *Allowed columns* ] column. This determines which object columns are available for selection in the [ *Which column values to set?* ] field. Enter “\*” to make all columns available.
- e. Specify the list of restricted columns as comma-separated values in the [ *Restricted columns* ] column. These columns will not be available for selection in the [ *Which column values to set?* ] field. Values in this column have a higher priority than values in the [ *Allowed columns* ] column. If you make all columns available in the [ *Allowed columns* ] column (the “\*” value), the restricted columns will not be available for selection during the setup.

## The [ *Modify data* ] element

The [ *Modify data* ] element  modifies the existing section records, detail records, or lookup entries. With the [ *Modify data* ] element, you can use data from the participant's contact record, as well as the connected objects, to set the corresponding values in the modified record (Fig. 18).

To set up the [ *Modify data* ] element:


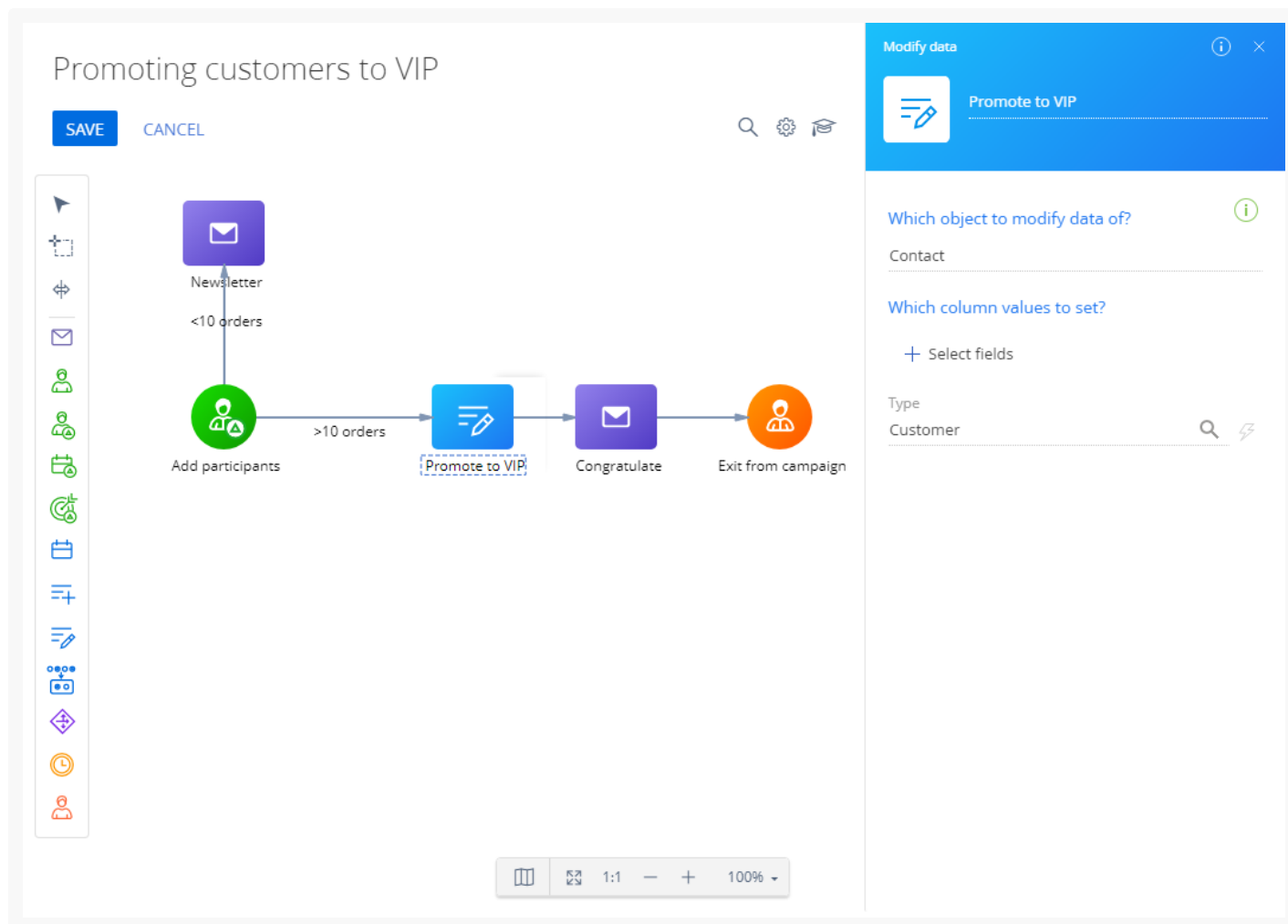

1. Drag the  element to the diagram.
2. Use the [ *Which object to modify data of?* ] field to select the object whose records to modify. For all objects, except the “Contact” object, the record must be connected to the participant's contact. For example, if you select the “Lead” object, the element will modify the data of the lead connected to the participant's contact record. By default, the element only lets you modify the “Contact” object data. You can configure the list of **available objects** in the [ *Modify data element - allowed objects* ] lookup. Add new objects to the lookup the same way as with the [\[ “Add data” element - allowed objects \] lookup](#).
3. Specify the list of record fields to modify in the [ *Which column values to set?* ] field. For example, select the [ *Type* ] field to change the type of the contact. The fields specified in this area are populated with custom values. Other fields do not change their value during campaign execution. Fill out the fields the same way as the [\[ \*Add data\* \]](#) element's fields.

Fig. 18 Set up the [ *Modify data* ] element



## The [ *Eliminate duplicates* ] element

The [ *Eliminate duplicates* ] element  validates the campaign's audience using the specified rules and eliminates active duplicate participants.

A campaign can have a single [ *Eliminate duplicates* ] element or multiple elements with different rules (Fig. 19).

To set up the [ *Eliminate duplicates* ] element:


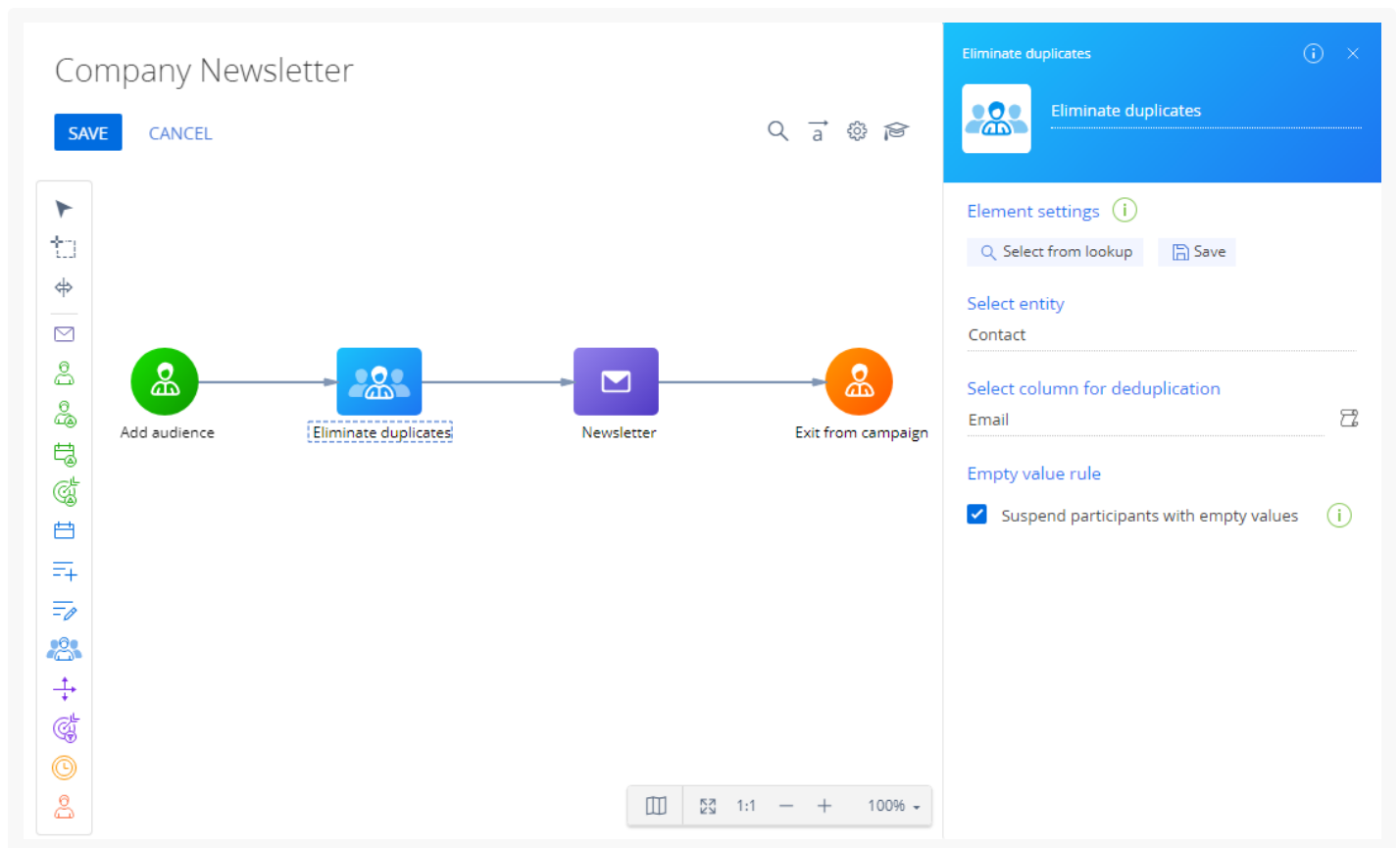

1. Place the  element on the diagram.
2. Select the lookup with potential campaign participants in the [ *Select entity* ] dropdown list. For example, "Contact."
3. Select the lookup column in the [ *Select column for deduplication* ] field to search for duplicates. Select any column of the relevant lookup or that of its connected object. For example, if you select "Contact" in the [ *Select entity* ] field, you can select "Email" in the [ *Select column for deduplication* ] field. To set up deduplication using multiple fields, add multiple [ *Eliminate duplicates* ] elements and configure a different rule for each element.
4. Select the [ *Suspend participants with empty values* ] checkbox to exclude participants whose column for deduplication is not populated.

Fig. 19 Set up the [ *Eliminate duplicates* ] element



## The [ *Random split* ] element

The [ *Random split* ] element  advances participants to different outgoing flows randomly. This is useful for A/B testing and promo campaigns of different products for a single target audience (Fig. 20).

To set up the [ *Random split* ] element:


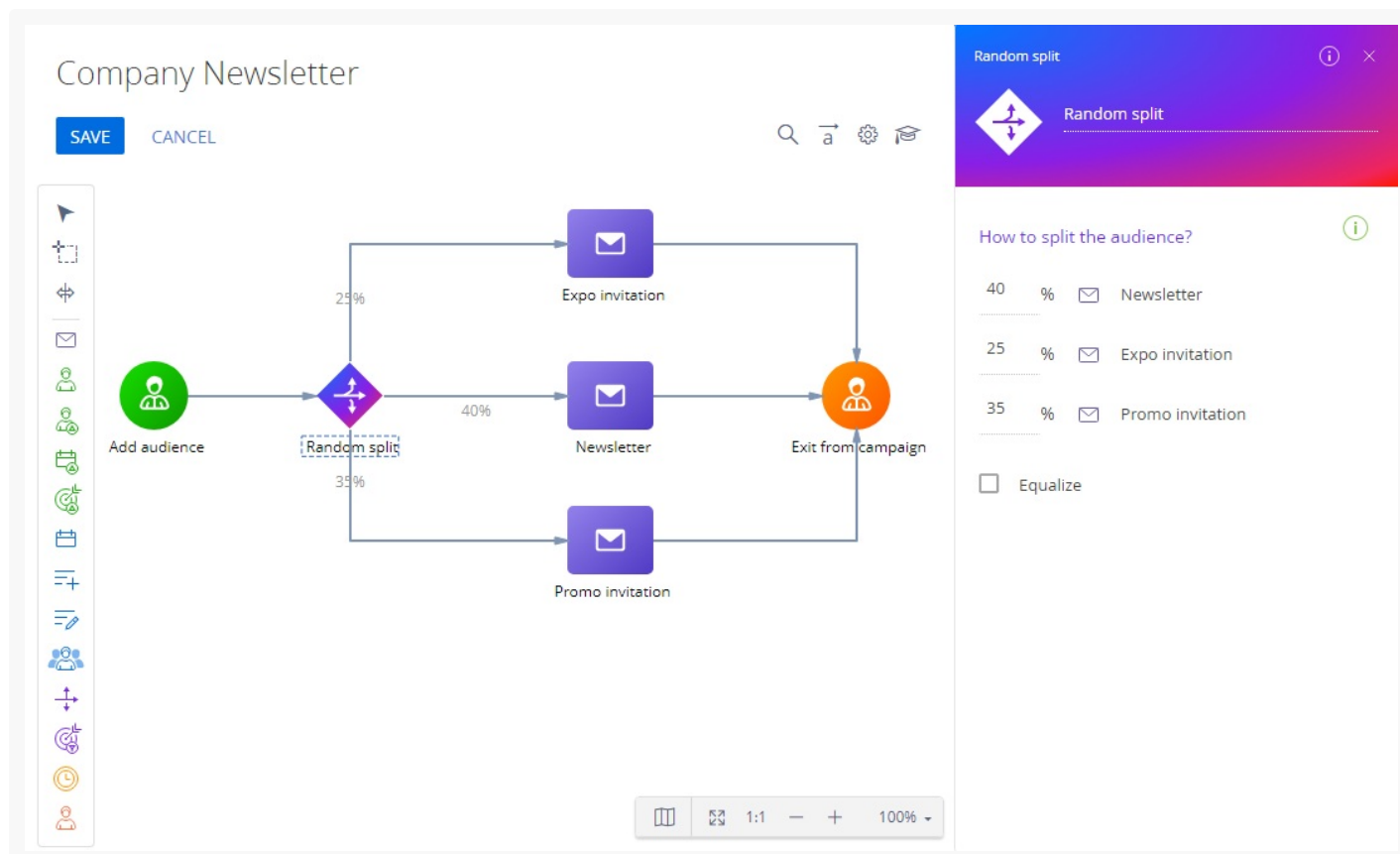
1. Place the  element on the diagram.
2. Add an outgoing flow to each subsequent campaign element.
3. Clear [ *Equalize* ] checkbox to specify a custom audience distribution ratio. By default, the element distributes the audience automatically.
4. Set up the audience distribution in the [ *How to split the audience?* ] field by specifying the audience percentage for each outgoing flow. Nonuniform audience distribution cannot be configured if the [ *Equalize* ] checkbox is selected.

Fig. 20 Set up the [ *Random split* ] element



## The [ *Landing page* ] element

Use the [ *Landing page* ] element  to integrate landing pages and campaigns (Fig. 21).

Unlike the [ *Add from landing* ] element, the [ *Landing page* ] element lets you filter participants who filled out a landing page web form based on their response on any intermediate campaign step. For example, notify your entire audience of an upcoming event but send the reminders only to those who confirmed their intention on the landing page.

To set up the [ *Landing page* ] element:


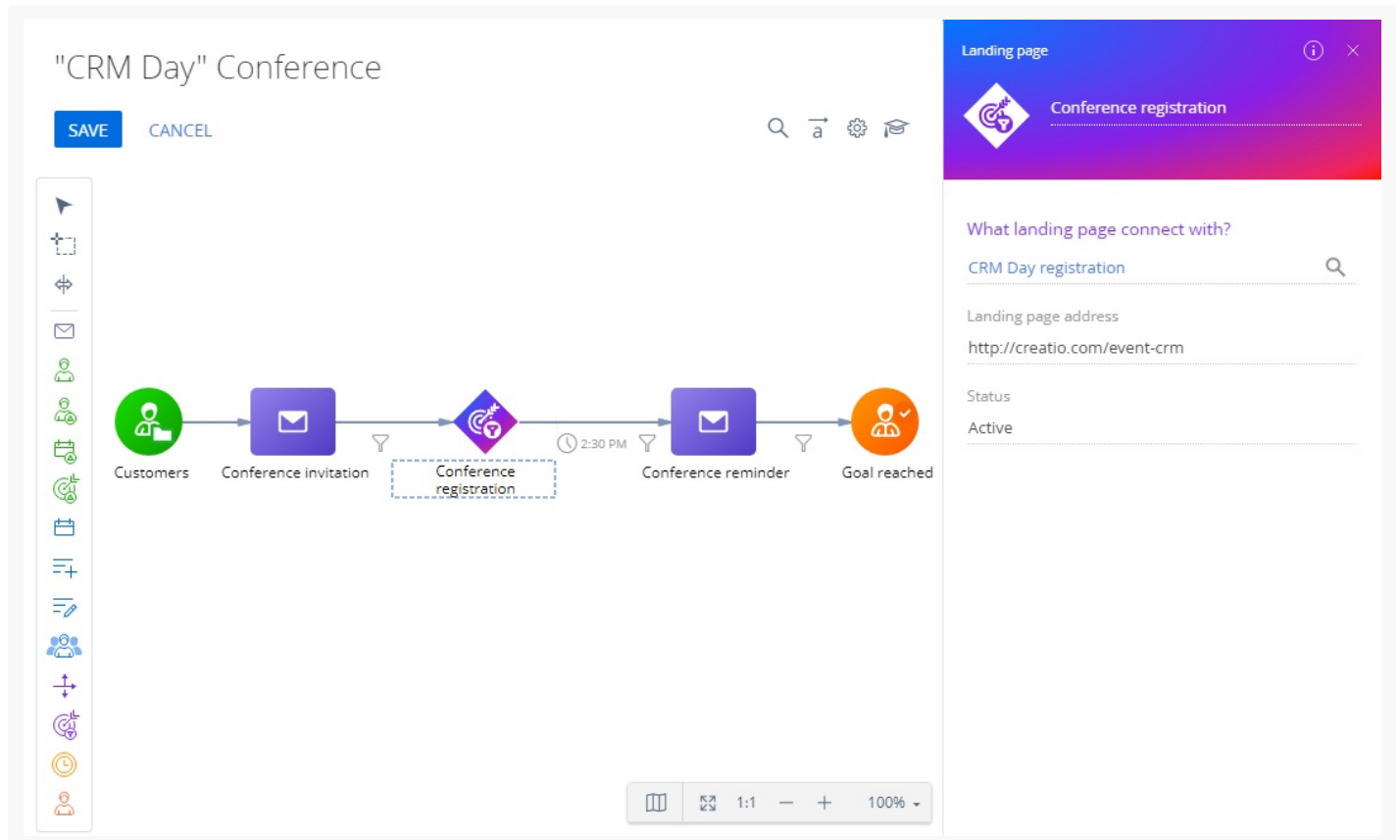
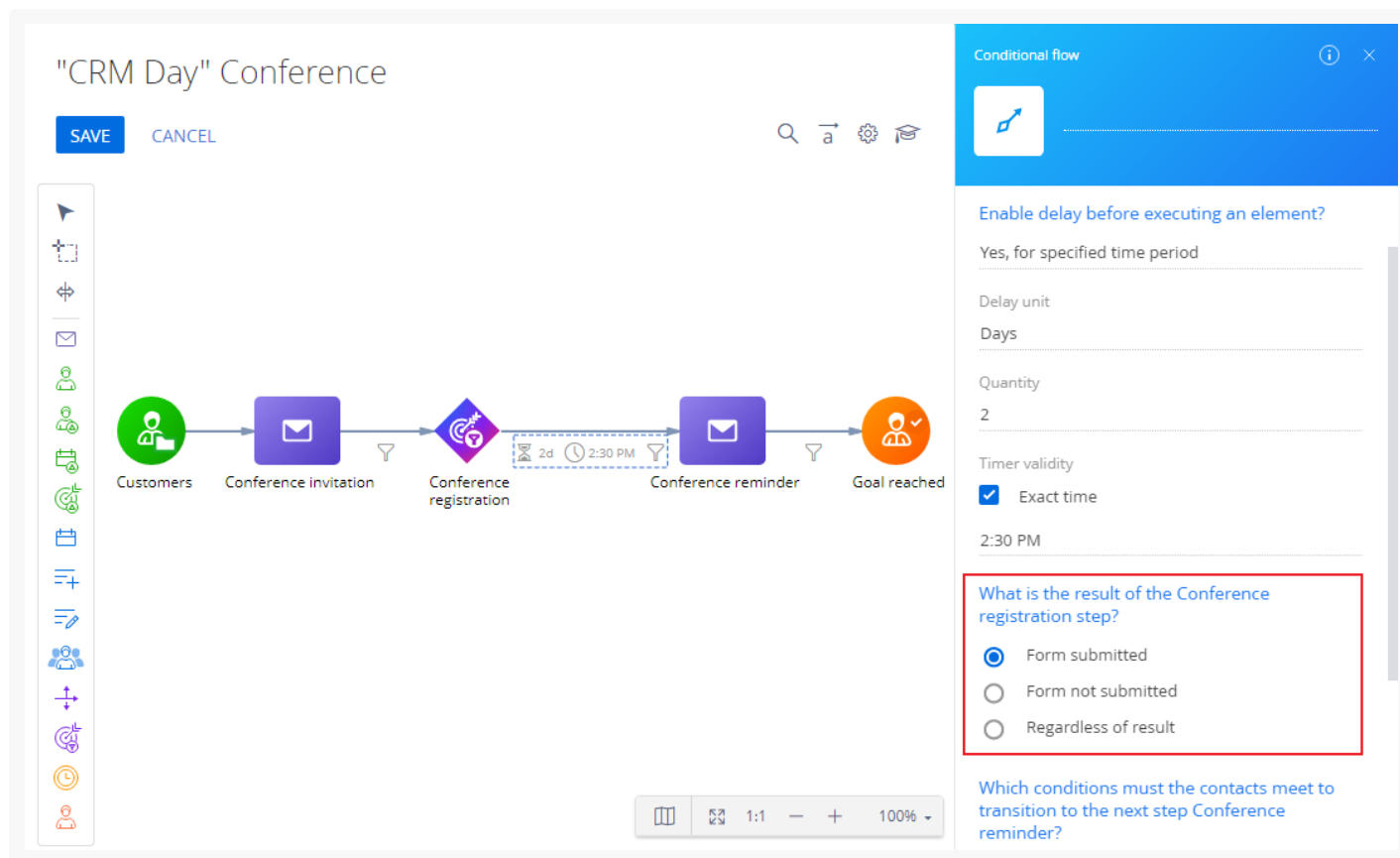
1. Drag the  element to the diagram. This element must have incoming flows.
2. Select one of the previously added landing pages in the [ *What landing page to connect with?* ] field. After you fill out the parameter, the element's properties area will display the landing page URL and status, as well as the Creatio object bound to the landing page. These fields are locked and populated with the value specified upon the [creation of the landing page](#).

Fig. 21 Set up the [ *Landing page* ] element



The [ *Landing page* ] element's outgoing flow properties include the results of user interaction with the web form in the [ *What is the result of the Landing page step?* ] block (Fig. 22).

Fig. 22 Transition depending on the user response on the landing page



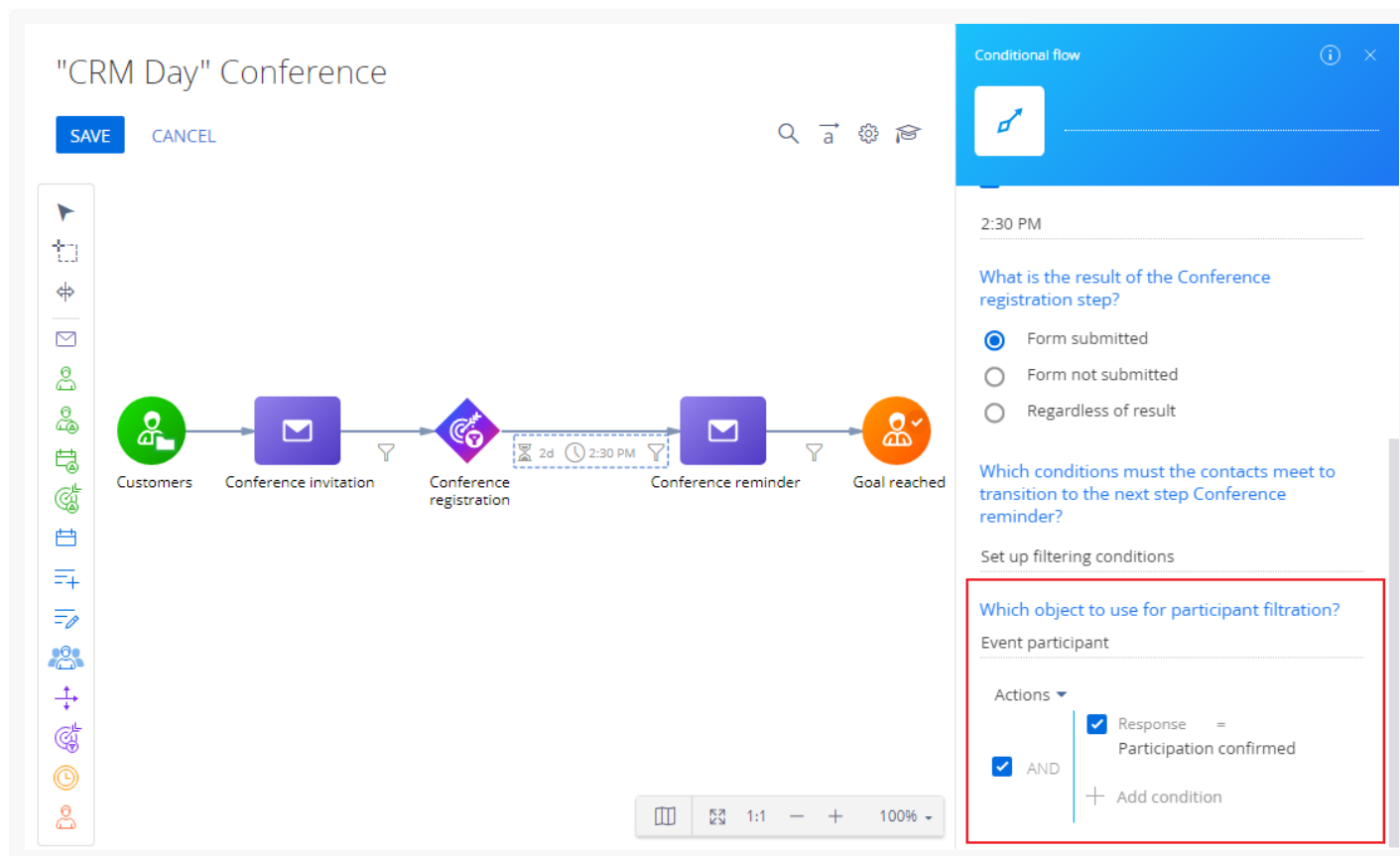
Depending on the user response, you can:

- advance only those participants who submitted the landing web form
- advance only those participants who did not submit the landing web form
- advance participants regardless of the result


Much like any campaign element, the [ *Landing page* ] element advances the participants through the outgoing flows based on the flow's delay or the campaign execution frequency (if a delay is not enabled in the flow properties).

You can set up filters by response type and additional object parameters when moving to the next campaign element. For example, as displayed on Fig. 23.

Fig. 23 Set up the conditional flow




## The [ *Timer* ] element

Use the [ *Timer* ] element  to exercise complete control over the campaign element execution time frames (Fig. 24). You can transfer participants to the following campaign steps at the time and frequency specified in the timer properties.

The timer can be set to trigger once or regularly based on a schedule (daily, weekly, monthly, etc.). The parameters of the [ *Timer* ] event will differ depending on the selected "Frequency of timer start" option.

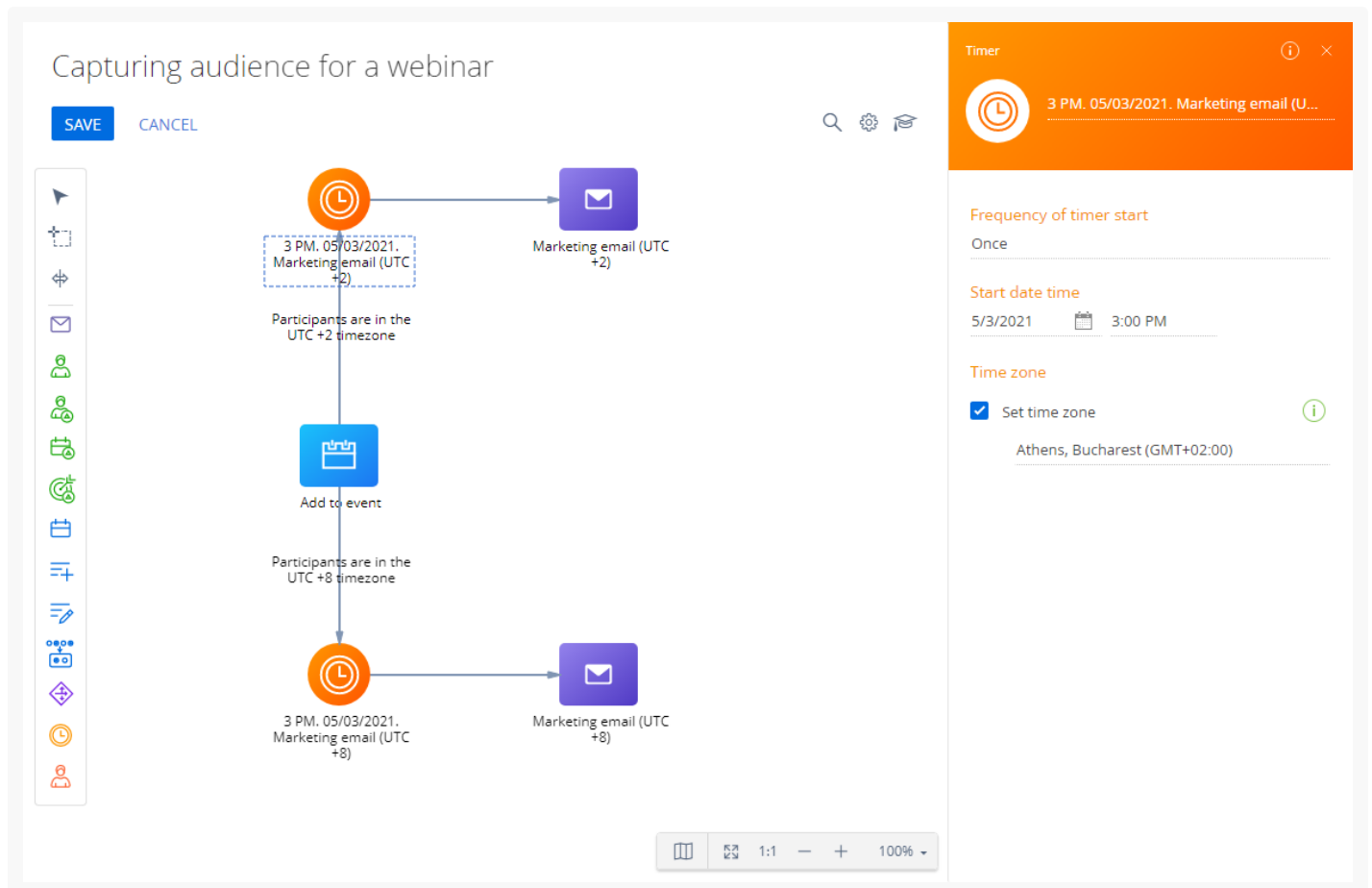
To set up the [ *Timer* ] element:

1. Drag the  element to the diagram.
2. Specify the [ *Timer* ] element's operation using the [ *Timer validity* ] field. For example, "Once." The base settings of the element are different depending on the frequency. The following frequency options are available:
  - [Once](#)
  - [Every day](#)
  - [Week](#)
  - [Month](#)
  - [Other frequency](#)
3. In the [ *Process start time* ] field, specify the time of day when the timer triggers the process. You can select 1 of the following:

- **“Period:”** the timer will trigger for each campaign execution that falls within the specified hours. For example, campaign frequency is set to 1 hour and the campaign starts at 1:00 PM. A timer with the [ *Execution time* ] set as a period from 3:40 PM to 4:40 PM will be triggered 3 times (1 for each campaign execution): at 2:00 PM, 3:00 PM, and 4:00 PM.
  - **“Exact time:”** a specific time of day at which the timer is triggered, regardless of the campaign default frequency. For example, execution time of a [ *Timer* ] element is set to 2:40 PM. The campaign frequency is 1 hour and it starts at 1:00 PM. In this case, the campaign will execute all elements that go before the timer in the campaign diagram at 2:00 PM and the timer will advance the campaign participants to the next elements at 2:40 PM.
4. Use the [ *Timer validity* ] field to specify the frequency of the [ *Timer* ] element. Fill out these fields if you need to limit the time frames of the [ *Timer* ] element operation. For example, you can set the timer to trigger during the next two months only. Use this parameter to deactivate part of the campaign flow without termination of the whole campaign. To configure the timer validity, select the [ *Start date and time* ] and [ *End date and time* ] fields.
- [ **Start date and time** ]: the timer starts working on this date and time according to the selected frequency options.
  - [ **End date and time** ]: the timer stops working on this date and time. Any participants who are transferred to the [ *Timer* ] element after the specified time will not advance to the next campaign elements.
5. Select the [ *Set time zone* ] checkbox to set the timer time zone if it is different from the campaign time zone. If campaign participants are located in different time zones, use several [ *Timer* ] elements to execute campaign steps at an appropriate time for each time zone.

**Note.** The [ *Execution time* ] and [ *Timer validity* ] options are not available for the timer with the “Once” frequency.

Fig. 24 [ *Timer* ] element on a campaign diagram



## “Once”

Select the “Once” timer frequency option to advance campaign participants to the next elements only once, at a specific time. For example, you can send a notificatino email about an event planned for a specific date.

Any participants who arrive at the [ *Timer* ] element after the specified time do not advance to the next campaign element.

## “Every day”

Select the “Every day” frequency option to advance campaign participants to the next elements once a day during the time or period specified via the [ *Execution time* ] settings. For example, you can send emails only during working hours.

## “Week”

Select the “Week” option in the [ *Frequency of timer start* ] field to advance campaign participants to the next elements every week, on selected weekdays, according to the [ *Execution time* ] settings (Fig. 25). For example, you can send marketing emails on workdays only.

Fig. 25 [ *Timer* ] element that runs weekly, every Monday and Wednesday

Frequency of timer start

Week

Which days of the week to run?

Su Mo Tu We Th Fr Sa

Execution time

☒ Period

from 2:40 PM to 4:40 PM

☐ Exact time

## “Month”

Select the “Month” option in the [ *Frequency of timer start* ] field to have the timer triggered at the specific days of the month (i. e., on the first Monday of every third month), at the time specified in the [ *Execution time* ] settings (Fig. 26). For example, you can send monthly newsletters on every tenth day of the month.

Fig. 26 [ *Timer* ] element that runs on the first Monday of the month, every 3 months

Frequency of timer start

Month

Run every

3 month

Start day

☐ Day of the month

☒ Day of the week

First Mo

☐ First/last work day

The “Month” timer frequency includes the following additional properties:

[ *Run every* ]: specify the timer frequency in months. For example, set the timer to trigger every third month.

[ *Start day* ]: select days on which the timer triggers.

1. [ *Day of the month* ]: the timer will trigger on the specified day of month (e. g., every tenth of the month).
2. [ *Day of the week* ]: the timer will trigger on the specified day of week (e. g., every third Friday of the month).
3. [ *First/last work day* ]: the timer will trigger on the first or last business/regular day of the month.

## “Other frequency”

Select the “Other frequency” option in the [ *Frequency of timer start* ] field to set a custom timer frequency via a

**cron** expression (Fig. 27).

Fig. 27 [ *Timer* ] element that runs on day 6 of the month every 2 months

Frequency of timer start

Other frequency

Cron expression

0 \*\* 6 \*/2 ? \*

On day 6 of the month, every 2 months

Fill out the [ *Cron expression* ] field with a cron expression to set a custom timer that runs every day or less frequently. If the expression is valid, Creatio displays its interpretation under the [ *Cron expression* ] field.

Learn more about using cron expressions in [QUARTZ documentation](#).

## The [ *Exit from campaign* ] element


The [ *Exit from campaign* ] element  enables participants to exit from a campaign (Fig. 28):

- by meeting the **filter conditions** of a specific static or dynamic folder (regardless of the current campaign step)
- by reaching the [ *Exit from campaign* ] element as part of the **campaign flow**
- by both (the **campaign flow and folder conditions**) if the element has an incoming flow and the folder is specified

**Note.** Incoming flows are optional for [ *Exit from campaign* ] elements.

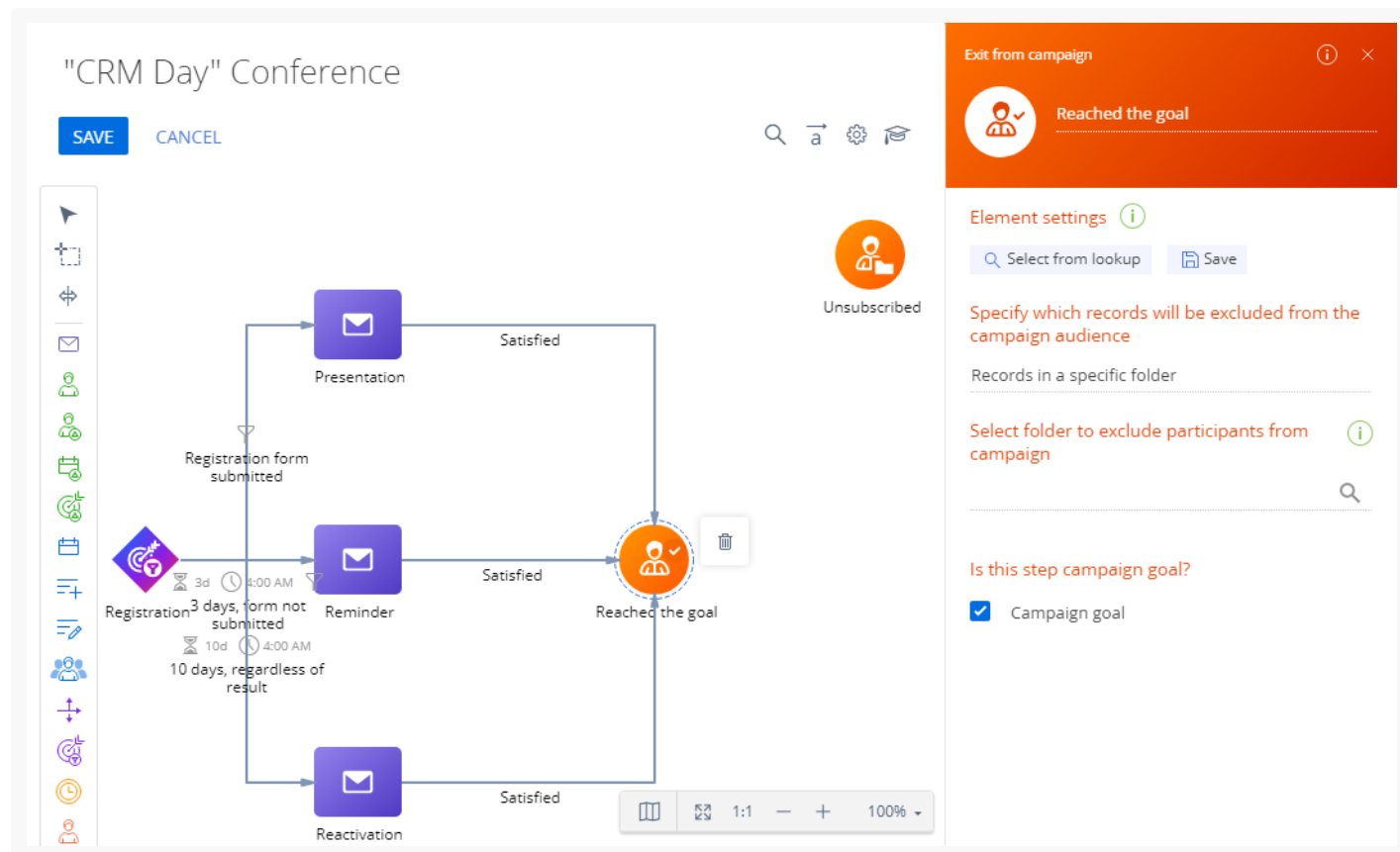
You can add several [ *Exit from campaign* ] elements to a campaign diagram.

To set up the [ *Exit from campaign* ] element:

1. Drag the  element to the diagram.
2. Select “Filter” or “Folder” in the [ *Specify which records will be excluded from the campaign audience* ] field.
  - Specify “**Folder**” to exclude participants from a campaign based on their properties. Then, select a dynamic folder with the corresponding filter in the [ *Select folder to exclude participants from campaign* ] field. As a result, any participants who meet the filter conditions will exit from the campaign automatically regardless of their current step. For example, to set up a campaign exit point for participants who have unsubscribed from trigger emails and thus have not reached the goal, configure a dynamic folder with the “Unsubscribed” Email response and specify it as a folder for excluding the participants.
  - Specify “**Filter**” and set up a filtering condition to exclude matching participants.
3. Select the [ *Campaign goal* ] checkbox to mark the achievement of the campaign's goal upon exit. For example, you can use it to count participants who confirmed their participation in an event. All participants

who transfer to this step via an incoming flow or by meeting the folder conditions will have the “Reached the goal” value in the [ *Current step* ] column on the [ *Audience* ] tab of the campaign page.

Fig. 28 [ *Exit from campaign* ] elements on a campaign diagram



Participants exit from a campaign as follows:

- **Via flows.** If the [ *Exit from campaign* ] element has incoming flows, all participants who have reached this step exit the campaign.
- **Via flows after going through all of the campaign's steps.** If the incoming flows of the [ *Exit from campaign* ] element are configured without a group to exclude, all of the participants will go through all of the campaign steps.
- **Via folder conditions and flows.** The participants who reached this step via an incoming flow as well as those who meet the conditions of the dynamic folder (regardless of their current campaign step) all exit the campaign.