



Indition CRA - Marketing Automation

User Manual

Operating the marketing automation product end to end — audience, content, journeys, messaging and monitoring.



POWERED BY AI

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The complete guide to using Indition CRA - Marketing Automation. Every feature, every operation. Each one is covered the same way: what it is, why you need it, how to use it, the operations available to you, and what is worth knowing before you start.

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1. Getting started

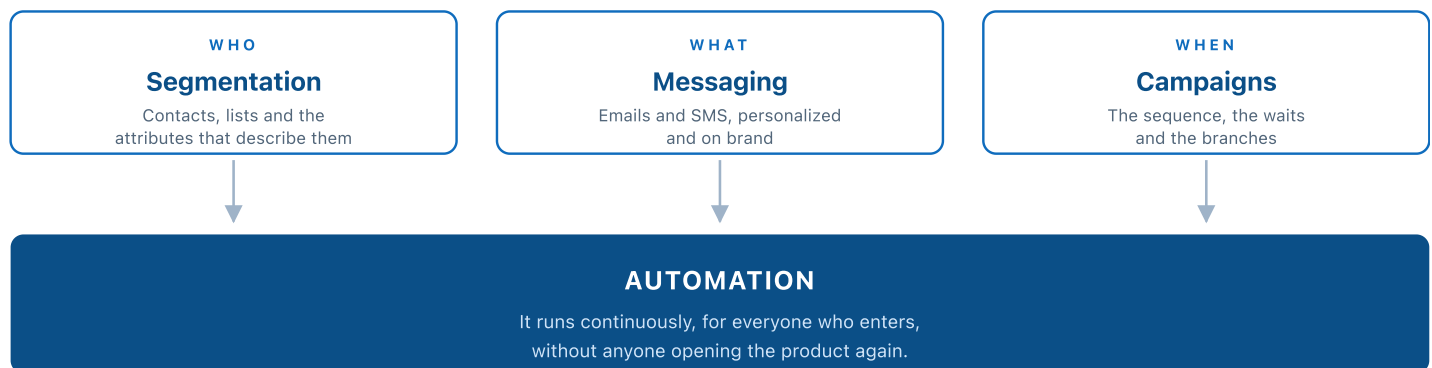
1.1 What this product does

Indition CRA - Marketing Automation holds the people you communicate with, the messages you send them, and the rules that decide who gets what and when — then runs the whole thing for you, continuously, and records what happened.

It covers email and mobile messaging, website tracking and contact capture, and reporting across all of it, so your audience, your content and your results are never in three systems that disagree.

1.2 The four things that matter

The product has many screens, but only four ideas. Everything else supports one of them.



Segmentation — who

A contact record holds a person, and every email address and phone number they have, each carrying its own consent. Contacts group into **lists**, and **attributes** describe what you know about them — a tier, an interest, a renewal date.

The idea worth absorbing early: an audience does not have to be a list you maintain by hand. A list can be defined by attribute criteria, so it populates itself. Set someone's tier to Gold and they join the Gold audience; change it and they leave.

Messaging — what

Emails are built in a visual builder from rows, columns and blocks, with global styles so everything stays consistent and on brand. Where your plan includes it, you also send SMS, MMS and RCS. AI can draft an email, write the subject line and generate the images to go in it.

Everything is personalized from your own data, so one message becomes one per recipient — their name, their renewal date, even a different link or image per person.

Campaigns — when, and in what order

A campaign is a sequence you draw once: send this, wait a week, check whether they opened it, send something different depending on the answer. Each contact travels that sequence individually, on their own clock.

You are not scheduling messages. You are describing a journey, and anyone who enters takes it.

Automation — without you

A **Dynamic** campaign runs continuously and has no end date. Point it at an audience and every person who enters receives your whole sequence, starting at the first message, from the moment they arrive.

What pushes them in can be your own data — joining a list, gaining an attribute, finishing another campaign — or a signal from outside: your website, an import, or a universal trigger watching for a condition. The same routes take people back out again.

This is the part that changes how you work. Sections 3 and 4 cover it properly, and it is worth reading them before you build anything.

1.3 AI built in

AI is not a side feature here. It writes your emails, designs your templates, creates your images and builds your reports — grounded in your brand and your own documents rather than generating from nothing.

FROM A SENTENCE TO A FINISHED EMAIL

Describe what you want. Get something you can send.

Type what the email is for, attach your product sheet or price list, choose your brand kit — and get back a complete, laid-out email with a subject line and original images, built from real editable blocks rather than a block of text you have to reformat.

It reads your uploaded documents for the facts, looks at reference images you supply, and follows the typography, voice and writing rules in your brand kit. The result opens in the normal editor, so everything is yours to change.

WHAT IT DOES	WHERE YOU USE IT
Writes a complete email — laid out in real rows, columns and blocks	Email builder
Writes the subject line alongside the email	Email builder
Generates original images , including a hero image placed at the top, each with alt text	Email builder
Edits an existing image rather than starting again	Email builder
Rewrites copy you already have — shorter, warmer, more direct	Email builder
Adds a single block to an email you are already happy with	Email builder
Designs a template from a description	Template builder
Writes mobile message content and generates its image	Mobile message builder
Builds a saved report from a plain-language question	Smart Views

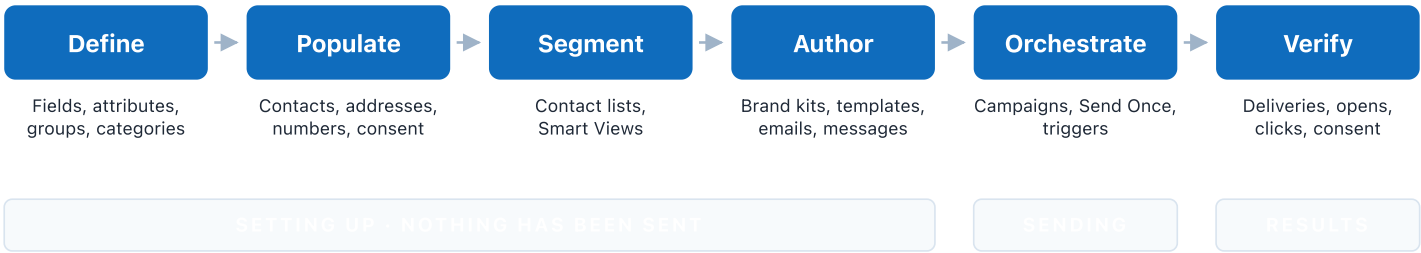
What makes the output yours rather than generic

- **Your brand kit** — typography, voice, tone, audience, writing rules and logos all feed the generator.
- **Your documents** — upload a PDF, Word file or text file and its content becomes the source material, so the email contains your actual facts, prices and dates.
- **Your reference images** — supply images and the generator takes visual cues from them.
- **Your website** — used as a reference so generated imagery matches the business it is for.

 Wherever you see this mark in the manual, **that feature uses AI**. Section 6.4 covers how to use it, step by step.

1.4 How you actually work

In practice, almost every task follows the same six-stage path. You will usually be working in one stage at a time, but knowing the shape helps when something downstream is blocked.



Saving is not sending. Activating a campaign is what starts it, and the Results screens are where you confirm what reached people.

STAGE	YOU SET UP	COVERED IN
Define	The reusable vocabulary your audience and content share	Section 8
Populate	The people, their addresses and numbers, and their consent	Section 7
Segment	The audiences you will actually address	Sections 7 and 8
Author	The content and the brand it carries	Section 6
Orchestrate	When content reaches whom, and under what conditions	Sections 3 to 5
Verify	What actually happened	Sections 10 and 11

1.5 Signing in and access

Use the Indition CRA Marketing Automation app. Your app switcher may label it **Indition CRA Marketing Automation (AI)**. If you also see a Legacy application, do not use it for the tasks in this manual — its screens and settings are different.

Access is granted operation by operation. Being able to open a screen does not automatically let you create, edit, delete, bulk-update, share, retry or export on it. If something described here is missing for you, it is usually one of four things:

1. The module is not part of your subscription.
2. Your role does not include that specific operation.
3. The record is in a state that locks it — completed, running, or set as a default.
4. A connected service it depends on is not configured.

Your administrator can tell you which.

1.6 How this manual is organised

Sections 3 to 11 cover every feature in the product. Each one follows the same pattern, so you can skim to the part you need:

- **What it is** — one paragraph.
- **Why you need it** — the practical benefit.
- **Fields** — what you fill in, and the rules that apply.
- **How to use it** — the main task, step by step.
- **Operations** — every action available on that feature.
- **Good to know** — the things that save you a support call.

Section 12 covers the controls that appear on nearly every screen, so the feature sections do not repeat them. Section 13 is a reference of validation messages, limits and tokens.

2. What's in the product

Every feature, grouped by what it is for. Use this to find the right screen, then the detailed section for how to use it.

2.1 Audience

FEATURE	WHAT IT IS FOR
Contacts	The people you communicate with, their addresses, numbers and consent.
Contact Imports	Bringing contacts in from a spreadsheet or a connected source.
Contact Lists	Named audiences that campaigns address.
Attributes	Characteristics you record about people and segment on.
Attribute Groups	Organising related attributes and declaring what kind of values they hold.
Contact Custom Fields	Your own fields on the contact record, with their own personalization tokens.
System Custom Fields	Site-wide values shared by all content using their token.
System Default Fields	Built-in site information — company name, address, phone — as tokens.
Smart Views	Saved, shareable views of your data that answer a recurring question.

2.2 Emails and SMS Messages

FEATURE	WHAT IT IS FOR
Brand Kits	Your logos, typography and writing guidance in one place.
Email Templates	Reusable email designs your individual emails are built from.
Emails	The email content itself, in a visual builder or a code editor.
Mobile Messages	SMS, MMS and RCS content with per-channel previews.
Campaign Categories	Classifications that keep campaigns and reporting legible.

2.3 Campaigns and sending

FEATURE	WHAT IT IS FOR
Campaigns and Journey Builder	Multi-step journeys with waits, decisions, branches and experiments.
Campaign Runtime Overview	The live summary of a running campaign.
Send Once	A one-off send to a chosen audience, now or scheduled.
One Time Email Sends	The history of your one-off sends.
Universal Triggers	Standing automation rules that apply outside any single campaign.
Mobile messaging	Sending SMS, MMS and RCS, where your plan includes it.

2.4 Website tracking

FEATURE	WHAT IT IS FOR
Tracking Code	The snippet for your website, and the integration guides.
Tracking Settings	Collector and cookie domains, page-view behaviour and tracker status.
Allowed Domains	Which websites may send tracking data to your account.
Action Definitions	Letting a website interaction change a list, campaign or attribute.
Contact Forms	Turning website form submissions into contacts.
Visitors	Who is browsing your site, known and unknown.
Tracking Health	Whether website data is arriving, and what is being rejected.

2.5 Results

FEATURE	WHAT IT IS FOR
Journey Progress	Where each contact has got to in a journey.
Journey Outcomes	How each decision and move resolved.
Email Deliveries	What happened to every email, and why when it failed.
Email Opens	Who opened, and what they did next.
Email Open Audit	Whether an open signal was a person or a machine.
Link Clicks	Which links people actually clicked.
Journey Link Security	Tracked links that were blocked, and why.
Mobile Message Deliveries	Mobile processing and carrier outcomes.
Contact Mobile Replies	Inbound replies matched to a contact.
Test Email Logs / Test Message Logs	Whether your test sends left the building.
Experiment Assignments	Who got which A/B variant, and which won.
Trigger Executions	When a trigger fired and whether it changed anything.

2.6 Consent

FEATURE	WHAT IT IS FOR
Email Suppressions	Addresses blocked by unsubscribe, bounce or a manual block.
Messaging Suppressions	Phone numbers blocked from messaging.
Unsubscribe Events	Each unsubscribe and the content it came from.
Unsubscribe Feedback	The reasons people gave when they left.

3. How campaigns work

This is the centre of the product. Everything else — contacts, lists, emails, messages, tracking — exists to feed a campaign or to report on one. If you understand this section, the rest of the manual is detail.

3.1 The idea

A campaign is a **definition**: a sequence of steps you draw once. Contacts enter it, and the definition decides what each of them receives and when.

The important part is that **every contact travels the sequence individually**. The product keeps a position for each person — which step they are on, and when they are next due — and advances them one step at a time. Two people who join three weeks apart both get the whole sequence from its beginning, three weeks apart.

That is what makes a campaign different from a send. You are not scheduling messages; you are describing a journey, and anyone who enters takes it.

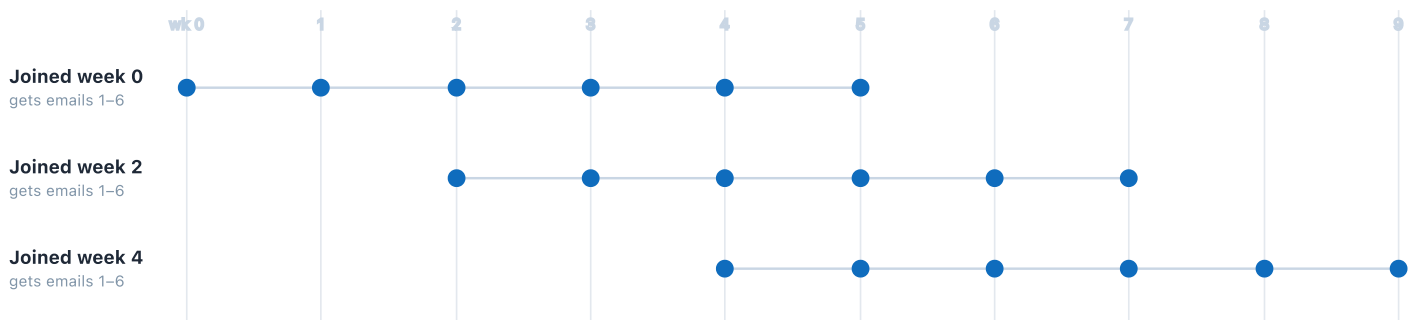
3.2 Six emails, one a week

Cadence comes from **Wait** steps placed between content steps. A Wait holds a contact for a set number of days, hours and minutes before the next step runs. So a six-part series, one email a week, is six Email steps with a seven-day Wait between each:

THE DEFINITION · YOU DRAW THIS ONCE



WHAT EACH CONTACT ACTUALLY GETS



Nobody joins in the middle. Each contact starts at Email 1 on the day they enter, and the same one-week spacing applies from their own start date.

The same principle covers any shape you need — three messages over ten days, a reminder two hours after a first message, a follow-up a month later. The Wait steps are the schedule.

3.3 The three ways to run a campaign

MODE	WHAT IT DOES	USE IT FOR
On demand Send Once	One message to one audience, sent now or at a time you set. No sequence, no follow-up.	An announcement, an invitation, a one-off notice.
Scheduled Campaign type: Scheduled	A sequence that runs to a fixed timeline, with a start and an end date. Everyone moves against those dates.	A launch, an event run-up, a seasonal series.
Dynamic Campaign type: Dynamic	A sequence that runs continuously. Each contact starts at the first step the moment they enter and moves on their own clock.	Welcome, onboarding, renewals — anything that should keep running as people arrive.

Dynamic is the one that changes how you work. It is the heart of the product and has its own section — see [section 4](#).

3.4 Where a contact can be

As a contact moves through a campaign, their enrollment carries a state. You will see these on Campaign Runtime Overview and Journey Progress.

STATE	MEANING
Active	Moving through the journey normally.
Waiting	Held at a Wait step until their next due time. This is the most common state in any campaign with gaps in it, and it is not a problem.
Decision pending	At a Decision step, inside its evaluation window, waiting to see what they do.
Move pending	A Move Campaign step has been reached and the move is being processed.
Completed	Reached the end of the sequence.
Exited	Left the journey before the end.
Failed	Could not continue. The reason is recorded against the enrollment.

Each enrollment also carries a **run number**, which distinguishes a contact's second pass through a campaign from their first.

3.5 Repeat entry

By default a contact who has completed a campaign does not enter it again. The **Is Recursive** setting controls this. Turn it on when the journey is something a person should be able to go through more than once — an annual

renewal sequence, for example. Leave it off for anything a person should only ever receive once, like a welcome series.

3.6 Versions, and changing a running campaign

Activating a campaign publishes a **version** of the definition, and contacts travel the version they started on. If you later change the journey and republish, the new version applies going forward — it does not retrospectively rewrite the path of someone already halfway through.

Campaign Runtime Overview names the active version. Check it before interpreting anything, especially if you have republished recently.

ACTION	EFFECT
Activate	Publishes the campaign and starts enrolling contacts.
Republish	Publishes a new version of a campaign that is already running.
Pause	Stops the engine advancing anyone. Enrollments stay exactly where they are.
Resume	Picks up from where everyone was.
Complete	Ends the campaign. Completed campaigns become read-only.
Duplicate	Copies the definition into a new campaign to work from.

3.7 Mixing email and mobile

Where mobile messaging is set up, a campaign can send both. Email and Mobile Message steps sit side by side on the same canvas, so a sequence can email someone on day one and text them on day four. The one rule is that you cannot place two steps of the same channel back to back without a Wait or a branch between them — which stops anyone accidentally sending two emails at the same instant.

3.8 What to read next

Section 5 is the operational detail: building the canvas, configuring each step type, choosing an audience, and activating. **Section 10** is where you watch it run.

4. Dynamic campaigns

Dynamic campaigns are the reason this product exists. Everything in section 3 applies to them, but they behave differently enough — and matter enough — to deserve their own section.

4.1 What a dynamic campaign is

A dynamic campaign is a sequence that **runs continuously**. It has no fixed timeline of its own. Instead, each contact starts at the first step the moment they enter, and moves through the sequence on their own clock.

It does not end when a batch finishes, because there is no batch. It keeps running, picking up whoever arrives, until you stop it.

THE ONE THING TO UNDERSTAND

This is what makes the product an automation platform

A **Scheduled** campaign is a better way to send a newsletter. You choose the dates, it runs, it finishes, and you build the next one.

A **Dynamic** campaign is a machine you build once and leave running. Point it at an audience and from that moment **every person who enters receives your entire sequence** — starting at message one, on their own clock — without anyone opening the product again.

Your welcome series runs itself. Your onboarding runs itself. Your renewal reminders run themselves, for every customer, at the right moment relative to *their* start date rather than yours.

You stop scheduling messages and start defining what should happen.

4.2 Scheduled or dynamic

SCHEDULED

One shared timeline. Fixed dates. It ends.

Everyone starts together



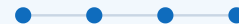
Join on 18 March and you miss the first three messages. Join on 25 March and you get nothing at all.

Use it when the dates are the point — an event, a launch, a seasonal push.

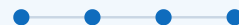
DYNAMIC

Each contact's own clock. Always running.

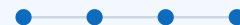
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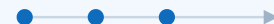
Joins Thu



Joins next week



Joins in a year



NO END DATE · KEEPS RUNNING

Everyone gets the whole sequence, whenever they arrive. Set up once.

	SCHEDULED	DYNAMIC
The timeline belongs to	The campaign	Each contact
When someone gets message one	On the campaign's start date	The moment they enter
Someone who joins late	Misses what has already gone	Gets the full sequence from the start
Needs start and end dates	Yes	No — it runs until you stop it
Ongoing effort	Build a new one each time	Build once, leave running
Best for	Events, launches, seasonal pushes	Welcome, onboarding, renewals, re-engagement

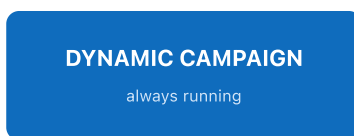
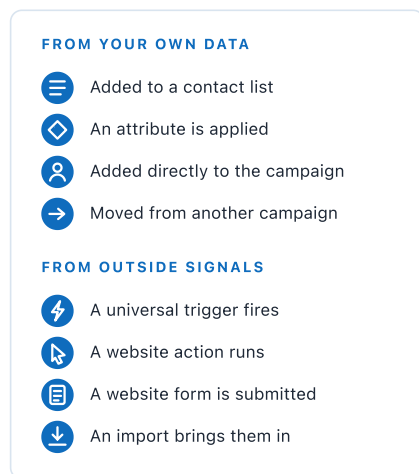
If you are unsure, ask one question: **does the timing depend on the calendar, or on the person?** Calendar means Scheduled. Person means Dynamic — and most of what you build over time will be Dynamic.

4.3 How people move in and out

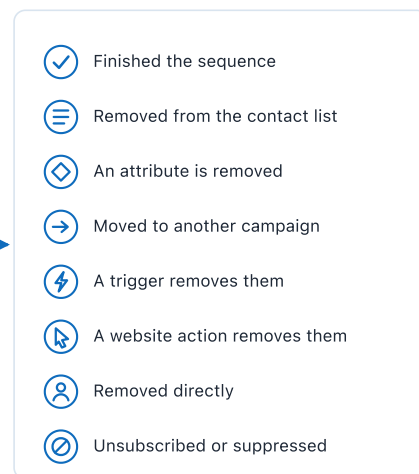
A dynamic campaign is only as useful as the things that can push people into it. Two kinds of signal do that, and both work in both directions — they can add someone, and they can take someone out.

- **Your own data** — membership, attributes and actions taken inside the product.
- **Outside signals** — universal triggers, your website, and imported data.

WAYS IN



WAYS OUT



The same mechanism often appears on both sides: whatever can add someone to a list, apply an attribute or move them between campaigns can equally take them out again.

Contact list membership

The main route. A campaign's audience is one or more contact lists. Anyone who becomes a member of one of those lists enters the campaign; anyone removed from every list feeding it stops being part of its audience. This is why lists are worth naming and maintaining carefully — for a dynamic campaign, the list *is* the intake.

Attribute associations

This is the most powerful route, because it lets the data decide. A contact list can be defined by **attribute criteria** rather than hand-picked members — every contact whose tier is Gold, whose renewal date falls in a range, whose interest includes a given topic. Point a dynamic campaign at that list and the campaign becomes self-populating: apply the attribute to someone and they enter; remove it and they fall out of the audience.

Attributes can be applied by hand on a contact, in bulk from Manage Contacts, by an import, by a website action, or by a universal trigger — so anything that can set an attribute can, indirectly, enrol someone in a campaign.

Direct assignment

You can add a contact to a campaign directly from their Campaigns tab, or add many at once using the bulk update on Manage Contacts. Useful for exceptions and for testing with a small group before pointing a whole list at something.

Imports

The importer can place contacts straight into an active dynamic campaign as part of the import, as well as onto lists and into attributes. A file from an event or a partner can therefore arrive and begin its welcome sequence in the same operation.

Website actions and contact forms

An action definition can add a contact to a campaign, to a list, or apply an attribute — and equally remove any of those. Your website invokes it by its key, so a click or a form submission enrolls someone without anyone touching the product. Contact forms can run linked actions after a successful capture, so a new enquiry can be created and enrolled in one step.

Universal triggers

Triggers are standing rules that watch for a condition and apply an effect. Because they can target campaign, list and attribute membership, they are the general-purpose route for anything that should happen automatically — including moving someone into a dynamic campaign, or out of one.

Moves from another campaign

A **Move Campaign** step inside a journey moves a contact out of that campaign and into another. This is how you chain journeys together — finish onboarding and move into the regular nurture sequence, or branch someone who did not engage into a re-engagement campaign.

4.4 Internal and external data

It is worth being explicit about the two kinds of signal, because the second is what connects this product to the rest of your business.

	INTERNAL DATA	EXTERNAL DATA
What it is	Actions taken and recorded inside the product	Signals arriving from outside it
Examples	Opened, clicked, unsubscribed, completed a journey, was added to a list, had an attribute applied	Website activity, form submissions, imported data, anything a universal trigger is watching
How it acts	Decision steps branch on it; triggers and moves react to it	Universal triggers, website actions and imports apply the change
Can it enrol someone	Yes	Yes
Can it remove someone	Yes	Yes

Both sides write to the same three things — list membership, campaign membership and attributes — which is why a rule written once works no matter where the signal came from.

4.5 Building a dynamic campaign

1. Decide the intake first. Which list, and is that list hand-built or defined by attribute criteria?
2. Create the campaign and set **Campaign Type** to Dynamic.
3. Set the name, category and recipients.
4. Decide **Is Recursive** — whether someone who completes should be able to go through again.
5. Start the canvas with Audience and choose your list.
6. Build the sequence, using Wait steps for the spacing and Decision steps where the path should differ.
7. Save the draft and walk the whole journey.
8. Activate.
9. Add one test contact to the intake list and watch them appear in Journey Progress.
10. Once you are satisfied, let the real intake flow.

Because a dynamic campaign has no end date, the moment you activate it, it is live for everyone who matches. Testing with a single contact first is worth the extra minute.

4.6 Chaining campaigns together

Move Campaign steps let you build a set of journeys that hand contacts to each other rather than one enormous canvas. A common shape:

- A **welcome** campaign every new contact enters.
- On completion, a move into a **nurture** campaign that runs indefinitely.
- A decision that branches the unengaged into a **re-engagement** campaign.
- A **renewal** campaign driven by a date attribute, entered automatically as the date approaches.

Each is small enough to understand and change on its own, and the moves between them are visible in Journey Outcomes.

4.7 Watching it run

A dynamic campaign is never "finished", so you watch it rather than review it. Three screens answer most questions:

SCREEN	TELLS YOU
Campaign Runtime Overview	How many people are enrolled and where they are concentrated.
Journey Progress	Exactly where any individual is, and when they are next due.
Journey Outcomes	How decisions resolved and where moves sent people.

A large number of contacts sitting in **Waiting** is normal and healthy in a dynamic campaign — it means people are between messages, which is what the Wait steps are for.

5. Campaigns and sending

5.1 Campaigns and the Journey Builder

What it is. The visual builder where you compose a journey — audience, email and mobile stages, waits, decisions with yes and no branches, moves between campaigns, and A/B email experiments.

Why you need it. It turns a single send into a conversation that adapts. Wait three days, check whether they opened, send a different follow-up to those who did — set up once, and it runs for every contact without anyone touching it.

Campaign settings

FIELD	RULES
Name	Required, up to 200 characters. Internal only.
Category	Required.
Recipients	Required. Primary Only uses each contact's primary address; All Emails uses every eligible address. With mobile enabled this is labelled All Emails/Phone Numbers.
Description	Optional, up to 1,000 characters.
Contact Type	Where offered, narrows which email type is eligible. It does not control SMS subscription.
Is Recursive	Where offered, controls whether a contact can enter the journey again after completing it.
Timezone	Where offered, the campaign's own timezone. Check it alongside the scheduling screen.
Campaign Type	Scheduled runs to a fixed timeline; Dynamic runs separately for each contact from the moment they enter.
Audience	At least one list or individual contact is required to save and activate.

Canvas components

COMPONENT	YOU CONFIGURE	WORTH KNOWING
Audience	Contact lists and/or individual contacts	Always the first component. Eligibility of each address is resolved when sending.
Email	Stage name, the email, and optional subject and sender overrides	Selecting an email references it; nothing is sent until the campaign runs.
Mobile Message	Stage name and an eligible message	Available where mobile is enabled. This drawer has no category, sender or subject fields.
Wait	Days, hours and minutes	The combined delay before the next step.
Decision	The decision type and how long to wait for an answer	The evaluation window and any branch delay are two separate timers.
YES / NO branch delay	A wait specific to one branch	Starts only once the decision resolves.
Move Campaign	The target campaign or campaigns	Moves the contact into another journey.
A/B Email	The experiment options	Available on supported scheduled paths.
Trigger / Exclusion	Conditional behaviour alongside a stage	Mobile Message stages cannot take a trigger or exclusion.

Building a campaign

1. Open Manage Campaigns and create a campaign.
2. Complete Configure Campaign: name, category, recipients, campaign type and any optional fields.
3. Start the canvas with Audience.
4. Open the Audience drawer and choose your contact lists and/or individual contacts.
5. Add the next component the palette offers.
6. Open each component and complete its content, target, delay or condition.
7. Check the connections, and both branches of every decision.
8. Save the draft and correct any reported errors.
9. Reopen and verify the saved canvas and audience.

Choosing the audience

1. Open the Audience component, usually by double-clicking it.
2. On Contact Lists, select your lists and check the available email and phone counts for your recipient mode.
3. Open Contacts to add individuals. The grid shows active contacts with their names, created date, emails and phones.

4. Select across pages and filters as needed. Use *N Contact(s) Selected* to review only your selections, and *Show Full Grid* to return.
5. Use Select Visible or Clear Visible for the rows currently on screen.
6. Use *Clear Selected Contacts* only when you intend to remove the individually chosen audience on save.
7. Choose Done, then save the campaign.
8. Reopen the audience and check the counts.

The audience drawer deliberately hides create, edit, delete, import and export — it is a selector, not Manage Contacts. An existing campaign loads the *number* of individually selected contacts rather than every name, which keeps large campaigns quick.

Adding content to a stage

1. Choose the content component at the point you want it.
2. Open the drawer and enter the stage name.
3. Search the gallery and select your saved content.
4. Use Preview to check the content.
5. For email, review the subject, sender override, personalization defaults and any dynamic content options.
6. For a mobile message, choose the stage name and message, and check the channel previews.
7. Choose Done, save the campaign, then reopen the component to confirm.

The palette guides you into a valid journey: a canvas starts with Audience, and you cannot place two emails or two mobile messages back to back without a wait or a branch between them — a guard against accidentally double-messaging someone. Email to mobile and mobile to email are both allowed where mobile is enabled.

Waits and decisions

1. Add Wait where the palette allows and enter days, hours and minutes.
2. For a decision, choose the type and the evaluation window.
3. Review both the YES and NO paths.
4. Set a branch delay separately if one path should wait longer.
5. Save and review the whole path before activating.

Activating and scheduling

1. Save and review the campaign.
2. Open Activate Campaign and read every error and quota warning.
3. Choose the start mode and enter the date and time.
4. Check any required end date — it cannot be before the start or in the past.
5. Confirm the timezone the screen is using.
6. Activate once audience, sender, content and timing are all reviewed.
7. Check the publication and runtime status afterwards.

Operations

OPERATION	WHAT IT DOES
Save draft	Stores the campaign without starting it.
Activate	Publishes a runtime version and begins enrolling contacts.
Republish	Publishes a new version of a campaign that is already running.
Pause	Halts processing. Enrollments stay where they are.
Resume	Restarts a paused campaign.
Complete	Ends the campaign. Completed campaigns become read-only.
Duplicate	Creates a copy to work from.
Manage triggers	Add, list and remove triggers attached to the campaign.
Runtime Overview	Opens the live summary — see 10.1.

Good to know. Schedules are entered in your timezone and converted behind the scenes. The messages you may see are *Start date is required.*, *End date is required.*, *End date must be on or after the start date.* and *End date cannot be in the past.* Completed campaigns are read-only, and recipient mode, contact type or campaign type can lock once a campaign is running — the screen explains why. Before changing a running campaign, check Runtime Overview to see which version is live. Contacts already part-way through a journey continue on the version they started on; your changes apply to the version you publish.

5.2 Send Once

What it is. A one-off email send from a chosen email to a chosen audience, immediately or scheduled.

Why you need it. Not everything needs a journey. An announcement, an invitation or a one-time notice goes out in minutes without leaving a campaign behind to maintain.

FIELD	RULES
Name	Required. Internal name for the send.
Source Email	The saved email you selected before opening Send Once.
Subject	Required. Review it for this send.
Schedule Type	Send Now (the default) or Schedule Later.
Schedule Date	Required for Schedule Later and must be in the future. Check the timezone shown.
Recipients	Primary Only or All Emails.
Contact Lists / Contacts	At least one source. Lists only, contacts only, or both.
Override sender settings	Optional. When on, From Name plus an authorized From Email and Reply To Email are required.

How to use it

1. In Manage Emails, select the email and open Send Once.
2. Check the source email in the drawer title.
3. Enter the name and review the subject.
4. Choose recipients and pick your contacts and lists.
5. Review the eligibility information shown, rather than assuming every selected contact can receive it.
6. Keep the default sender, or switch on the override and choose authorized addresses.
7. Choose Send Now or Schedule Later.
8. Review content, audience, sender, subject and timing together.
9. Choose Send or Schedule Campaign.
10. Follow the result in One Time Email Sends and Email Deliveries.

Good to know. This is a real send, so the final button is the one to pause on. The plus icon in the recipient picker creates a genuine new contact, not a one-off entry — after creating one the drawer refreshes its calculated eligibility, so if the new contact still cannot receive the email, check the address status and subscription. A one-off send does not create a reusable contact list, so your audience list stays clean.

5.3 One Time Email Sends

What it is. The history of your one-off sends, optionally narrowed to a single source email.

Why you need it. It answers "did we already send this, and when?" and gets you from a piece of content to the results it produced.

How to use it

1. Open it from the email's own one-off send history where possible, so the list is already scoped.
2. Confirm the source-email scope shown on the screen.

3. Filter to the name and schedule time you want.
4. Check the campaign state and processing indicators — configuration state and delivery completion are two different things.
5. Open the runtime or delivery detail to see actual outcomes.
6. Clear the scope deliberately if you want to compare against a wider list.

Good to know. This screen reviews sends; it does not create them. If a send seems missing, check the source-email scope and your filters first. For a scheduled send that has not reached its time yet, an absence of deliveries is expected rather than a fault.

5.4 Universal Triggers

What it is. Standing automation rules that watch for a condition and apply an effect, independently of any single campaign.

Why you need it. Some things should always happen — when this attribute changes, add them to that list. Triggers handle the rules that outlive individual campaigns.

SETTING	PURPOSE
Trigger identity and type	A clear name and the source type.
Source attribute group / attribute	What the rule watches. Changing the group clears the attribute selection.
Actionable and rules	The conditions, required variables, value options and ranges.
Target entity and attributes	What the rule changes. Changing the target entity clears the selected target attributes.
Active / Inactive panels	Whether the rule is available to run, and how rules are organised.
History	Past executions with their engine, signal, job and attempt detail.

How to use it

1. Open Universal Triggers and review the Active and Inactive panels.
2. Create a trigger, or open an existing one.
3. Choose the source type and its attribute or actionable context.
4. Complete the conditions, including required variables and ranges.
5. Choose the target entity and the operations to apply.
6. Review the whole source-to-effect relationship, then save.
7. Reopen the rule and check its summary.
8. Use Show execution history to see what it has actually done.

Operations

OPERATION	WHAT IT DOES
Edit	Opens the configuration.
Clone	Creates a separate rule. Check the new rule's status before assuming it is inactive.
Move to active / inactive	Changes availability. Separate from editing.
Reorder	Changes the order rules are applied in. Needs its own permission.
Delete	Removes the rule. There is no restore.
Show / hide execution history	Reads past runs without running anything.
Run trigger now	Genuinely runs the rule. Restricted by trigger type and whether it is enabled on your site.

Good to know. Changing the source group, target entity or actionable clears the dependent selections — reselect rather than assuming they carried over. *Run trigger now* is not a preview; if a run's outcome is unclear, check the history before running it again. Where Run Now is unavailable you will see *ADDR Run Now is not enabled on this site.* or *Run Now is available only for ADDR actionable triggers.*

5.5 Mobile messaging

What it is. The ability to send SMS, MMS and RCS alongside your email, and to receive replies back into the product.

Why you need it. Mobile reaches people email does not, and it is immediate. A reminder the morning of an appointment, a delivery notification, a time-limited offer — these work on mobile in a way they do not in an inbox.

Mobile messaging is an optional part of your plan, and it arrives ready to use. The provider account, the channels you have bought, your sending numbers and the handling of inbound replies are all configured for you. There is nothing for you to connect and no credentials for you to enter.

How to tell whether you have it

If mobile messaging is part of your plan you will see **Mobile Messages** in your navigation, and a **Mobile Message** step offered in the campaign builder alongside Email. If neither appears, mobile is not currently enabled for your account — speak to your Indition account contact.

Which channels you have

CHANNEL	WHAT IT SENDS
SMS	Plain text messages. The base channel.
MMS	Messages with images or other media attached.
RCS	Rich messages with a card, images and tappable call-to-action buttons, on handsets that support it.

Which of these you can use depends on what your plan includes. The message builder shows you the channels available to you and previews each one — if a channel is not offered, it is not part of your current plan.

What you can do with it

- **Write mobile messages** with personalization, media and channel previews — see 6.5.
- **Add a Mobile Message step** to any campaign, so a journey can email someone on day one and text them on day four.
- **Send a test** to your own number before anything goes out.
- **See what happened** in Mobile Message Deliveries, and read inbound replies in Contact Mobile Replies.

What to know about SMS

SMS is billed in **segments**, not messages. A short message is one segment. A longer one is split by the carrier into several segments, reassembled on the handset so the recipient sees a single message — but **you are charged for every segment**. A four-segment message costs four times a one-segment message to the same person.

The message builder shows a live **character count and segment count** as you type. Treat that counter as the authority before you send to a large audience.

WHAT AFFECTS IT	WHY IT MATTERS
Length	Plain text usually fits around 160 characters in a single segment. Past that the message splits, and each additional segment carries slightly less text because part of it is used to stitch the pieces back together.
Emoji and special characters	A single emoji, accented letter, curly quote or em dash switches the whole message to a different encoding, where only around 70 characters fit per segment. One emoji can therefore more than double the cost of the entire send.
Personalization	The counter reflects the text you typed. A token such as a first name resolves to a different length for every recipient, so a message sitting just under a segment boundary will tip over it for people with longer names. Leave headroom.
Maximum length	A message can be up to 1,600 characters . That is the ceiling, not a target — at that length you are paying for roughly ten segments per recipient.

The practical advice: write short, check the segment counter, avoid emoji unless they earn their cost, and preview with a long name rather than a short one.

What to know about MMS and RCS

MMS adds an image to the message. RCS adds a rich card with an image and tappable buttons. Both have limits on what you can attach:

	MMS	RCS
Image formats	JPG, JPEG, PNG, GIF	JPG, JPEG, PNG, GIF
Maximum file size	5 MB	5 MB
Images per message	1	1
Title	—	Up to 200 characters
Description	—	Up to 1,600 characters
Call-to-action buttons	—	Up to 2, each label up to 20 characters

A few things worth knowing:

- **MMS costs more than SMS** per message, so use it when the image does real work rather than as decoration.
- **5 MB is the upload ceiling, not a good size.** A large image is slow to load on a phone and may be compressed by the carrier. Size images for a phone screen before you upload.
- **Call buttons are US numbers only.** You can type them in any usual format and they are normalised for you; non-US numbers are rejected when you save.
- **If a channel is switched off later**, content you already wrote for it is kept rather than deleted, and the builder warns you.
- **Your limits may be lower** than the figures above if your plan sets tighter ones. The builder shows the allowed formats and size on the upload control itself.

Replies and opt-outs

Inbound replies are captured automatically and matched to the contact who sent them. When someone replies to opt out, the product records it and blocks that number from future messages without anyone doing anything — you can see the result in Messaging Suppressions. Ordinary replies are recorded too, so you can read what people actually said.

Good to know. Contacts need a phone number with SMS permission before they can receive anything, and that is separate from their email subscription. A contact who is happily receiving your emails may have no mobile consent at all — check the phone row on the contact record.

6. Emails and SMS Messages

6.1 Brand Kits

What it is. Your brand in one record — logos in four variants, typography, and written guidance on voice, tone, audience and the rules your copy should follow.

Why you need it. It keeps everything on-brand without anyone having to remember the fonts, and it is what every AI feature reads to write and design in your voice. A good brand kit is the single biggest thing you can do to make generated content come out sounding like you.

FIELD	RULES
Brand Kit Name	Required.
Website	Your brand's site.
Default / Status	One kit is the default. A default must be replaced before it can be deleted or deactivated.
Logos	Primary, Light, Dark and Icon. JPG, JPEG, PNG, GIF, WEBP or SVG, up to 5 MB each.
Typography	Heading Font, Body Font, Fallback Font, Base Size.
Personality	Voice, Tone, Audience, Traits, Values.
Writing guidance	Writing Rules, Avoid, AI Instructions.

How to use it

1. Open Manage Brand Kits and create a kit, or open an existing one.
2. Enter the name and website.
3. Upload each logo variant.
4. Choose your fonts and base size.
5. Complete the voice, tone, audience and writing guidance.
6. Save, then reopen and confirm the logos and settings.

Operations

OPERATION	WHAT IT DOES
Upload asset	Adds a logo variant. Size and format are checked; SVG files must contain valid SVG.
Delete asset	Removes a logo variant.
Set default	Makes this kit the default, clearing the flag from the previous one.
Update status	Active or Inactive. A default kit cannot be deactivated.
Delete	Removes the kit. A default kit cannot be deleted.

Good to know. To retire the default kit, make another kit the default first and confirm the indicator moved. The messages you will see are *Set another brand kit as default before deleting this one.* and *Set another brand kit as default before deactivating this one.* Guidance fields steer generated content but do not approve it — review anything AI produces for facts, links and tone.

6.2 Email Templates

What it is. Reusable email designs built in a drag-and-drop builder, which your individual emails are then created from.

Why you need it. Design the layout once and every email inherits it. Your newsletter looks like your newsletter whoever writes it.

How to use it

1. Open Manage Templates, or go straight to Template Builder.
2. Complete the template details and choose the design type.
3. Choose **Validate Template** when you intend to create it.
4. Build your design — add rows, columns and content blocks.
5. Preview it, including on a narrow screen, and check personalization.
6. Choose Save and wait for confirmation.
7. Reopen the template and check the saved design before using it in an email.

Operations

OPERATION	WHAT IT DOES
Validate Template	Creates the template record with a minimal starter layout.
Save	Stores your actual design and updates the preview images.
Copy	Creates a new active template from any existing one, carrying the design and layout but not its usage, history or sharing. Works even from an inactive original.
Status	Active or Inactive.
Delete	Removes the template.

Good to know. Validate Template creates the record immediately, so closing the editor without saving leaves an empty template behind rather than cancelling it. Rename or delete it if you changed your mind.

6.3 Building an email

What it is. The email editor, where you assemble the message your audience receives. There are two editors — a visual builder for designed emails and a code editor for hand-written HTML — and an email opens in whichever matches its type.

Why you need it. This is what people actually see. The builder handles the parts that are tedious and easy to get wrong in email — responsive layout, consistent typography, and links that resolve per recipient.

How an email is structured

Every email is built from three things, and understanding them makes the editor obvious:

LEVEL	WHAT IT IS
Rows	Full-width horizontal bands, stacked down the email. A row is the unit you reorder to move a section up or down.
Columns	Inside a row. Each column has a width ratio, so a row can be one full-width column, two equal halves, or an uneven split such as one-third and two-thirds.
Blocks	The actual content, placed inside a column — a paragraph, an image, a button, and so on.

Above all of it sit **global styles**, which set the defaults every block inherits, so you are not restyling each paragraph by hand.

Block types

BLOCK	WHAT IT ADDS	WHAT YOU CONFIGURE
Heading	A heading	The text, and the level — H1, H2, H3 or H4.
Paragraph	Body text	The text, with inline formatting and personalization.
Image	A picture	Source, alt text, an optional link, and size — either a scale percentage or a fixed size.
Logo	Your logo	The same as Image, plus the option to pull the asset straight from your brand kit rather than uploading it again.
Button	A call to action	Label, link, and typography — font, size, bold, italic, underline, letter spacing, alignment, and whether the button hugs its text or fills the column.
Divider	A horizontal rule	Line style and colour, block background, thickness and padding.
Spacer	Vertical space	Height, and block background.
Columns	A nested column layout	Column count and width ratios, how columns behave on mobile, backgrounds, borders, corners, padding and margin.
Social	Social icons	Whether it is a follow row or a share row, which networks and their links or labels, icon size, spacing, alignment, background and padding.
Video	A video thumbnail that links out	Video URL, thumbnail (automatic or your own), alignment, alt text, background, padding, corners and border.
Code	Your own HTML	The HTML itself, and whether it is sanitised before rendering.

Global styles

Set these once and every block follows them. You can still override an individual block where you need to.

GROUP	CONTROLS
Background	The page background colour behind the email, the email body colour, an optional background image, and the left and right padding used on mobile.
Text	Reading direction, plus a full set of defaults for each of P, H1, H2, H3 and H4: font family, colour, weight, italic, alignment, letter spacing, block background, border and corner radius — with separate font size, line height and paragraph spacing for desktop and mobile.
Link	Colour, bold, italic and underline for every link in the email.
Button	Shape, button and text colours, block background, border style, width and colour, font settings, alignment and letter spacing.
Image and Logo	Block background, corner radius, border, and per-device alignment and padding.
Divider	Style, line and background colours, and per-device thickness and padding.

Desktop and mobile

The editor has a device mode — you design on desktop and switch to mobile to check and adjust. Many blocks offer a **link desktop and mobile styles** option: leave it on and the two stay in step, turn it off and you can set padding, thickness or alignment differently on each. Text sizes, line heights and paragraph spacing always carry separate desktop and mobile values, and columns let you choose how they stack on a narrow screen.

Links

Image, logo and button blocks all take a link, with the type stated explicitly — a web address, an email address, or a phone number — and, for web links, whether it opens in a new tab. Keeping the types separate is what makes a phone link dial on a mobile rather than being treated as a broken URL.

Personalization

Insert tokens from the picker rather than typing them. They work in body text and headings, and also in places people often miss:

- A **button's web address**, so the destination differs per recipient.
- **Image and logo source fields**, so the picture itself can vary.
- **Image and logo link fields**.

A token can supply a complete URL, form the start of one with a fixed path after it, or sit inside a query parameter as a value. Preview with a real contact before sending — a token the contact has no value for renders as nothing, so check the sentence still reads.

Building one

1. Open **Emails** and create an email, or open an existing one.
2. Check which editor opened — the visual builder or the code editor.

- 3. Set the name, subject, category and status.
- 4. Set your global styles first. It is much faster than restyling blocks later.
- 5. Add rows, split them into columns where you need to, and drop blocks in.
- 6. Configure each block.
- 7. Insert personalization from the picker.
- 8. Switch to mobile view and check the layout holds.
- 9. Preview, checking links, images and how personalization resolves.
- 10. Save, then send yourself a test.

Operations

OPERATION	WHAT IT DOES
Preview	Renders the email as a recipient would see it.
Send test	Sends to an address you type. It does not touch your audience. Results appear in Test Email Logs.
Attachments	Add files to the email.
Copy	Creates a new active email with its own identity, carrying content and attachments but resetting usage and sharing.
Send Once	Starts a one-off send from this email — see 5.2.
Status	Active or Inactive.
Delete	Removes the email.

Good to know. Avoid clicking tracked links inside a preview — that records genuine engagement against the campaign. Use the test send instead.

 6.4 Generating content with AI

What it is. AI assistance built into the builders — it can write a whole email, design a template, rewrite a passage you already have, and generate the images to go with it.

Why you need it. It turns a blank canvas into a working draft in one step, already laid out in real blocks and already following your brand. You then edit it like anything else.

What it can do

CAPABILITY	WHAT YOU GET
Generate a complete email	A full email built as real rows, columns and blocks — not a flat lump of text — so you can edit every part of it afterwards. It can write the subject line at the same time.
Generate a single block	One block at a time, when you want to add a section to an email you are already happy with.
Rewrite	Takes content you already have and reworks it — shorter, warmer, more formal, whatever you ask for.
Generate images	Creates original images to sit in the email's image blocks, each with its own alt text. The main image is treated as the hero and placed near the top, below any logo or header row.
Edit an image	Modifies an existing image rather than creating a new one.
Design a template	Produces a reusable template design from a prompt.

What you give it

INPUT	WHAT IT DOES
Your prompt	What the email is for. The more specific the better — the audience, the offer, the tone, what you want them to do.
Brand kit	Choose a kit and the generator works from your typography, brand personality, logos and brand website, so the draft comes out sounding and looking like you.
Information documents	Upload PDF, DOCX or TXT files and their text is used as source material — a product sheet, a price list, an event brief. This is how you get an email that contains your actual facts.
Image reference documents	Upload images for the generator to look at and take visual cues from.
Model	Where your account offers a choice, pick which AI model to use. Some accounts have this fixed.

There are limits on how many documents and images you can attach and how large each file may be. The editor tells you when you exceed one.

Generating an email

1. Open the AI option in the email builder.
2. Write your prompt. Say who it is for and what you want them to do.
3. Choose the brand kit it should follow.
4. Attach any information documents holding the facts it should use.
5. Attach image references if you want a particular look.
6. Choose whether it should generate the subject line too.

7. Choose whether it should generate images.
8. Generate, and wait — a complete email with images takes longer than plain text.
9. Review everything: facts, offer, links, tone, and the images.
10. Edit anything that is not right — it is an ordinary email document now.
11. Save, then send yourself a test.

Rewriting existing content

1. Select the content you want changed.
2. Open the rewrite option.
3. Say how it should change — shorter, friendlier, more direct.
4. Review the result and keep or discard it.

Good to know

- **Check the facts.** If you did not supply a price or a date in an information document, do not assume the one in the draft is right.
- **Check the links.** Generated buttons may need the real destination putting in.
- **Alt text comes with generated images**, but read it — it should describe the image for someone who cannot see it.
- **Generation replaces what is on the canvas.** Where that would lose work you have not saved, the builder asks first.
- **If AI is unavailable**, it is either not part of your plan or switched off for your account. Your administrator can confirm.

6.5 Mobile Messages

What it is. SMS, MMS and RCS message content, with a live preview per channel and character and segment counts.

Why you need it. Mobile reaches people email does not, and the per-channel preview shows the message as the recipient will see it — including what one extra character does to your segment count, and therefore your cost.

FIELD	RULES
Message Name	Required.
Category	Required. Uses your active campaign categories and preselects the default.
Message	Required. The main text, personalizable.
Description	Optional. AI-generated metadata fills it only when empty.
Media	MMS only, within the displayed limits.
Rich Card and CTA buttons	RCS only. A populated button needs both a label and an action value.
Channel overrides	Per-channel content where you need it to differ.

How to use it

1. Open Mobile Messages and create a message.
2. Check which channels are available, and any warning about content on a channel now switched off.
3. Enter the name, category and message.
4. Insert personalization at the cursor position and review the sample values.
5. Add media, rich content and CTA buttons where available.
6. Review every preview tab, the character and segment counts, and any warnings.
7. Save after correcting validation, then reopen and confirm.

Operations

OPERATION	WHAT IT DOES
Preview	The on-screen preview updates as you type; the full preview gives the authoritative validation and character counts.
Upload / delete media	Manages MMS attachments.
Generate with AI	Produces a draft from your prompt, replacing unsaved content only after you confirm. It does not save the message.
Send test	Sends a test to a nominated number. Results appear in Test Message Logs.
Duplicate	Creates a copy to work from.
Update status	Active or Inactive.
Delete	Removes the message.

Good to know. Channels build on each other — MMS needs SMS, RCS needs both. Content for a switched-off channel is kept with a warning rather than deleted. A blank new message skips its first automatic validation so an

empty form does not immediately show errors; editing starts normal validation. A *Validated* preview means the content is sound, not that anything has been sent.

7. Contacts and audience data

7.1 Contacts

What it is. The record of every person you communicate with, holding their details, any number of email addresses and phone numbers, their postal address, your custom fields, and their list, campaign and attribute memberships.

Why you need it. Consent lives at the address, not at the person. Because each email row and each phone row carries its own status, subscription and primary flag, you can hold someone's work and personal address with different permissions on each — and stay on the right side of that difference automatically.

Fields

GROUP	FIELDS	RULES
Name and work	First Name, Last Name, Company, Job Title	Required markers come from your organization's contact form.
Email rows	Address, Type, Status, Subscription, Primary Email	One row per address. Status, subscription, primary and suppression are four independent facts.
Phone rows	Country, Number, Type, Status, Primary Number, Phone Call, SMS Subscription	Choose the country first. Numbers are validated and stored internationally. Extensions and letters are not accepted. Call permission and SMS permission are separate.
Address	Address lines, City, State, Country, ZIP, Type, Primary Address	The first email and phone rows default to primary; the address does not.
Other details	Timezone, plus demographic and social fields where offered	Availability depends on your configuration.
Custom fields	Your active contact custom fields	Follow each field's required, type, length, option and uniqueness rules.

Creating a contact

1. Open Manage Contacts and choose Create Contact.
2. Complete the contact form, adding an email row for each address and a phone row for each number, setting each row's status, subscription and primary choice.
3. For a phone, select the country, then enter the national number.
4. Complete any custom fields.
5. Open the List, Campaigns and Attributes tabs and add the memberships you want. In create mode these are held with the form.
6. Return to the details, review, and choose Save once.

7. Reopen the saved contact and confirm the details and memberships.

Editing a contact

1. Open the contact from Manage Contacts and confirm you have the right person.
2. Change the detail fields you need. Add or remove an email or phone row only after checking its flags.
3. Choose **Save Contact** within the Contact Form tab.
4. Reopen or refresh to confirm the change.

The one thing to remember. When editing, the List, Campaigns and Attributes tabs apply changes *immediately* on confirmation, while detail fields wait for Save Contact. Leaving the page discards unsaved detail edits but does not undo a membership you already confirmed.

Operations

OPERATION	WHERE	WHAT HAPPENS
Create	Manage Contacts > Create Contact	Saves the contact and any staged memberships together.
Edit details	Contact Builder > Contact Form > Save Contact	Saves the detail fields only.
View	Contact row > view	Read-only detail of the contact and its related records.
Activate / Deactivate	Contact Builder	Changes the contact's status. Separate from the form save — if the form has unsaved changes you are asked whether to discard them first. It does <i>not</i> unsubscribe addresses, clear suppressions or remove memberships.
Assign / remove lists	List tab	Applies immediately on confirmation.
Assign / remove campaigns	Campaigns tab	Applies immediately. Lists can also bring campaign membership with them — review both before concluding someone is or is not enrolled.
Apply / remove attributes	Attributes tab	Choose the group, then the attribute, then the value or range for its type. Applies immediately.
Bulk update	Manage Contacts > Actions	See below.
Search	Manage Contacts	Phone search ignores spaces, brackets, dashes and plus signs, so you can type the number however you remember it.
Import	Manage Contacts > Import Contacts	See 4.2.

Bulk updating contacts

1. Either select the contacts you want, or apply filters that describe them.
2. Open Actions and choose the explicitly named scope — Selected Contacts or Filtered Contacts.
3. Read the count and scope notice in the drawer.
4. Enter the value, and for a repeatable field choose Apply To.
5. Choose Apply, then check a few affected records.

Available operations cover enabled core fields, repeatable email, phone and address fields, eligible custom fields, Add to Lists, Add to Campaigns and Apply Attribute. Removing contacts from lists or campaigns in bulk is not part of this feature — use the list's own member removal for that. A custom field appears here only when it is Active *and* has Allow Bulk Update switched on. Filtered scope needs meaningful filters and a count within your configured limit, which is 10,000 by default.

Good to know. A contact existing and being active does not make any of its addresses sendable. If someone is not receiving mail, check the individual email row's status, subscription and primary flag, and then Email Suppressions.

7.2 Contact Imports

What it is. Bulk creation and updating of contacts from a spreadsheet — CSV, XLSX or XLS — or, where enabled for you, from an API endpoint or Google Drive.

Why you need it. A list from an event, a partner or another system becomes a usable audience in minutes rather than an afternoon of typing, with per-row validation so one bad address does not stop the rest.

The mapping screen

CONTROL	PURPOSE	RULES
Source	File, API JSON, or Google Drive	All three converge on the same mapping and validation.
Header row	Names your columns	The first row is treated as headings.
Contact ID	Identifies an existing contact for updating	Map the contact UUID, not a row number. A value that does not match will not fall back to email.
Identity email	Matches existing contacts and detects duplicates	Column only. Multiple addresses in one cell are split on a comma by default, then trimmed, lowercased and validated.
Spreadsheet Column	Takes the value from your file per row	Check the preview if a column looks shifted.
Set Value	Applies one fixed value to every row	Not available for identity fields.
Email Mappings	Address plus type, status, subscription and primary	Email subscription is address-level and must be mapped here.
Phone Mappings	Number plus country, type, status, primary and subscription	A phone number is never the matching identity.
Custom fields	Your configured contact fields	Values must satisfy the field's type, options and validation.

Importing a file

1. Open Contacts > Import Contacts, or the Import Contacts action in Manage Contacts.
2. Choose the file source and select your CSV, XLSX or XLS file.
3. Wait for your headings and sample rows to appear.
4. Choose whether you are adding new contacts or updating existing ones, and map the identity column.
5. Map your contact fields from Spreadsheet Column, or use Set Value for a constant.
6. Set up Email Mappings, adding a row per source email column.
7. Set up Phone Mappings, including how to interpret the country.
8. Map custom fields, double-checking any fixed values.
9. Review the preview — five rows by default — and correct the mapping.
10. Apply the import.
11. Check the row results, or My Imports if it went to the background.

How identity is resolved

SITUATION	OUTCOME
Adding, and the identity email already belongs to someone	The row is skipped as a duplicate.
Updating, and the identity emails all point at one contact	That contact is updated, subject to row validation.
Updating, and identity emails point at different contacts	The row is skipped as ambiguous and reported. Fix the source rather than guessing.
A contact ID is supplied but does not match	The row is reported. Correct the ID.
You mapped only part of a contact	Everything you did not map is left untouched. An import never clears data it was not given.

Operations

OPERATION	WHAT IT DOES
Apply	Runs the import with your mapping.
Discard upload	Abandons the staged file before applying.
Cancel	Stops an import that has not yet been committed.
My Imports	Lists background batches with their state and row outcome counts.
Import report	Shows the per-row results, including every failure and its reason.
Save mapping template	Stores your mapping for reuse. Templates are yours alone.
API profiles	Save, edit, preview and delete reusable API source connections.
Drive connections	Connect, browse, select a file, and disconnect a Google Drive account.

Good to know. Imports cannot be undone, so the preview is the step worth slowing down for. Files over a size threshold are processed in the background and appear in My Imports — wait for them rather than re-uploading, which creates a second batch. Partial success is normal: valid rows are saved while problem rows are reported individually. When reusing a mapping template, re-check the headings and especially any fixed subscription or status values, because a file with a similar name may not have the same columns.

7.3 Contact Lists

What it is. A named audience, built from saved contacts, direct additions, an imported file, or criteria based on attributes.

Why you need it. Lists are what campaigns address. Building one once and reusing it means "active customers" means the same thing in every campaign that uses it.

The List Builder

SECTION	CONTAINS	WHEN IT SAVES
Details	Contact List Name and Description	Create uses Save Contact List; edit uses Save Details.
Saved Contacts	Current members, with Linked At	Removal applies immediately after confirmation.
Available Contacts	Contacts you can add, with Last Updated	Adding to an existing list saves immediately; adding to a new list is staged.
Contacts To Add / To Remove	Pending changes in a draft	Review before saving.
Applied Attributes	Criteria by group, attribute and value or range	On an existing list, criteria save and remove directly.
Import	File upload and mapping	Create stages; edit offers a review step or direct addition.
Summary	Total Contacts, Eligible Emails, pending changes	Refresh after a change to see updated figures.

Creating a list

1. Open Manage Contact Lists and create a list.
2. Enter a name and description another person would understand.
3. Find people in Available Contacts and add them to the draft.
4. Review Contacts To Add and remove anything unintended.
5. Add attribute criteria if you want the list defined by characteristics.
6. If importing, map the file and review the validation results.
7. Review the complete pending audience and choose Save Contact List.
8. Reopen and check Saved Contacts and the summary.

Operations

OPERATION	WHAT IT DOES
Save Details	Saves the name and description only.
Add contacts	On an existing list, adds immediately. On a new list, stages.
Remove contacts	Asks for confirmation, then removes membership immediately. The contact record is untouched.
Add / remove applied attribute	Adds or removes a criterion on an existing list directly.
Estimate audience	Shows how many contacts the current definition reaches.
Preview audience	Shows a sample of who is included.
Import into list	Validate-then-review, or add valid rows directly.
Create Contact & Add	Creates a new contact and adds them in one step, where offered.
Toggle status	Makes the list active or inactive.
Delete	Shows the impact first, then removes the list. Members are not deleted.
Resync	Recalculates membership where a list is defined by criteria.

Good to know. *Total Contacts* and *Eligible Emails* are two different figures and are meant to differ — one counts people, the other counts addresses you may actually mail. Check the eligible figure before promising a reach number. *Saved Contacts* shows *Linked At* (when they joined the list) and *Available Contacts* shows *Last Updated* (when the contact record changed) — they are not the same event.

8. Audience definitions

These are the reusable building blocks your contacts, lists and content all share. Defining them well once saves rework everywhere else.

8.1 Attribute Groups

What it is. A named collection of related attributes that declares what kind of values they hold.

Why you need it. Groups keep your segmentation vocabulary organised and give the product the type information it needs to offer the right value control — a date picker for a date range, a single choice for a single set.

Fields

FIELD	RULES
Attribute Group Name	Required, unique, up to 200 characters. Leading and trailing spaces are trimmed.
Meta Type	Required. Date Range, Multiple Set, Single Set, Text Range or Text Value. The create screen opens on "Select", so choose explicitly.
Status	Active or Inactive. New groups start Active.
Assigned Attributes	The attributes in this group, with a count.
Available Attributes	Active attributes you can assign, ordered by name.
Non-Removable Attributes	Shown when attributes are in use, with the number of contacts and lists relying on each.

Creating a group

1. Identify the active attributes the group should contain.
2. From Manage Attribute Groups, choose Create Attribute Group.
3. Enter a specific name another operator can tell apart from similar groups.
4. Choose the Meta Type.
5. Set the status.
6. Move the attributes you want from Available to Assigned, and check the count. Add All and Remove All are available.
7. Choose Save once.
8. Find the group in the list, reopen it and confirm the name, type, status and assignments.

Operations

OPERATION	WHAT IT DOES
Create	Saves the group and its assignments together. If the assignments fail, nothing is saved.
Edit	Loads the current values. Protected attributes are kept by the server whether or not they are in your submission.
Delete	Blocked while the group is assigned to contacts or lists. For several groups at once, all are checked before any is removed.
Bulk update	Where enabled: change Status, or Assign or Remove an attribute across selected groups. Repeating a relationship change has no additional effect.
Share with customers	Where your account supports it: share selected groups with chosen customers or all customers. Sharing is queued and processed in the background.
Default Share	Adds or removes the group from the default sharing list. Removing it does not withdraw copies already shared.

Good to know. Choose the Meta Type deliberately — changing it later does not convert values you have already recorded. Once an attribute is genuinely in use it becomes non-removable, shown with its contact and list counts. That is a safeguard against a segment quietly breaking, not a fault: resolve the downstream use first.

8.2 Attributes

What it is. A named characteristic you record about people and segment on.

Why you need it. Attributes let you segment on what you actually know — interests, tiers, dates, ranges — without adding a field to the contact record for every question.

Fields

FIELD	RULES
Attribute Name	Required, unique, up to 200 characters.
Attribute Type	Choose the supported type for your use.
Attribute Group	At least one valid group is required.
Status	Active or Inactive. New attributes start Active.

How to use it

1. Open Manage Attributes and choose Create Attribute.
2. Enter a unique name.
3. Choose the type and at least one group.
4. Review the status and the selected groups, then Save.

5. Reopen and confirm group membership before using it in contact or list work.

Operations

OPERATION	WHAT IT DOES
Create / Edit	Saving replaces the group relationships with your submitted selection.
Delete	Blocked when contacts or lists use the attribute. For a batch, all are checked before any is removed.
Status	Inactive attributes disappear from new assignment options; existing values stay.
Share / Default Share	As for attribute groups, where your account supports it.

Good to know. Creating an attribute defines the characteristic; recording a value against a person is a separate step on the contact's Attributes tab, or in bulk from Manage Contacts. Making an attribute inactive is not the same as removing its use.

8.3 Contact Custom Fields

What it is. Extra fields on the contact record, each with its own input control, validation and personalization token.

Why you need it. This is how the product learns your business. Store a renewal date, an account manager or a preferred topic — then personalize on it and segment by it.

Fields

FIELD	RULES
Field Name	Required, up to 188 characters. This is the label people see and can be renamed freely.
Variable Name	Required at creation, up to 64 characters, lowercase letters, numbers and underscores, starting with a letter, unique. Locked once created.
Description	Up to 1,000 characters. Explain the intended values.
Input Type	Input Text, Textarea, Drop Down List, Radio Button List or Switcher. Defaults to Input Text.
Data Type	Text, Email, Numeric, URL, Phone or Date. Defaults to Text.
Order	A whole number controlling where the field appears.
Required / Unique	Both default to No.
Minimum / Maximum Length	Off by default. A disabled length limit is not a zero-character limit.
Date Render / Mask	Date Picker or Masked Input, with masks <code>Y-m-d</code> or <code>m/d/Y</code> .
Options	Required for dropdown and radio types. Each needs a distinct stored value.
Status	Active by default.
Allow Bulk Update	No by default. Must be on before the field appears in contact bulk updates.

How to use it

1. Open Contact Custom Fields and create a field.
2. Enter the Field Name, then the Variable Name — check it carefully, as it locks.
3. Choose the Input Type and Data Type.
4. Set the description, order and any validation.
5. For a choice list, add your options with distinct stored values.
6. Review Status and Allow Bulk Update, then Save.
7. Reopen and compare the label, variable name, options and settings.
8. Use the token in content, for example `{{contact.custom.preferred_topic}}`.

Operations

OPERATION	WHAT IT DOES
Create / Edit	The field and its options save together.
Update status	Inactive fields disappear from new pickers; existing tokens keep resolving.
Delete impact	Shows what uses the field before you delete it.
Delete	Blocked where the field is in use.
Copy token	Copies the personalization token to your clipboard. This is a clipboard action only.

Good to know. The Variable Name is the stable reference behind every token; the Field Name is just the label. Renaming the label never breaks existing content.

8.4 System Custom Fields

What it is. Site-wide values you define, each holding one current value shared by all content using its token.

Why you need it. Change a support URL or a seasonal offer code in one place and every piece of content carrying that token picks it up — instead of editing thirty emails.

The fields are the same as contact custom fields, with one addition: **Current Value**, the single value for your site.

How to use it

1. Open System Custom Fields and create a field.
2. Enter the Field Name and a stable Variable Name.
3. Choose the Input Type and Data Type.
4. Set the current value.
5. Save, then use the token, for example `{{system.site.custom.support_url}}`.
6. Preview a piece of content to confirm it resolves.

Operations. Create, edit, change status, check delete impact and delete. Deleting removes the stored value along with the definition, and is blocked while active emails or campaigns use it.

Good to know. Because the value is shared, review the content it appears in before changing it. Making a field inactive removes it from new pickers but does not stop existing content resolving it — deactivation is not a way to unpublish a value.

8.5 System Default Fields

What it is. Built-in site information exposed as personalization tokens — your company name, address, phone and website.

Why you need it. Standard details stay correct everywhere without anyone retyping them, and you control which appear in the picker so authors are not scrolling past fields you never use.

How to use it

1. Open System Default Fields and find the field.
2. Activate it to make it available in the personalization picker, or deactivate to hide it from new selections.
3. Copy the token the screen supplies and paste it into your content.
4. Preview to confirm the value.

FIELD	TOKEN	IN PICKER BY DEFAULT
Site Name	{{system.site.name}}	Yes
Absolute URL	{{system.site.absolute_url}}	Yes
Domain	{{system.site.domain}}	No
Company Name	{{system.site.company_name}}	Yes
Company Email	{{system.site.company_email}}	Yes
Phone	{{system.site.phone}}	Yes
Address	{{system.site.address}}	No
City	{{system.site.city}}	Yes
State	{{system.site.state}}	Yes
ZIP	{{system.site.zipcode}}	No
Country	{{system.site.country}}	No
About Us	{{system.site.about_us}}	No
Mail Sender Name	{{system.site.mail_sender_name}}	No
Mail Sender Address	{{system.site.mail_sender_address}}	No

Good to know. This screen controls picker visibility only. The values themselves are edited in Administration > System Settings > System Defaults. Always copy the token rather than typing it from the label — ZIP uses the key `zipcode`. State and Country resolve to their proper names, not internal codes.

8.6 Campaign Categories

What it is. Named classifications for your campaigns and content.

Why you need it. Categories keep reporting legible once you have hundreds of campaigns, and let you tell a promotional send from a transactional one at a glance.

FIELD	RULES
Category	Required, unique, up to 200 characters.
Description	Optional, up to 1,000 characters.
Status	Active by default.
Default	No by default. Setting Yes clears the flag from every other category.

How to use it

1. Open Manage Categories and choose Create Category.
2. Enter the name and a description explaining when to use it.
3. Set Default only if new content should preselect it.
4. Save, then check it appears in your campaign and message selectors.

Operations. Create, edit, change status, set or clear default, and delete. Deletion is blocked while campaigns or templates reference the category.

8.7 Smart Views

What it is. A saved, shareable view of your data — you choose the dataset, the columns, the filters and the sort order, and the result becomes a named screen.

Why you need it. The questions you ask weekly stop being a rebuilt filter every time. Define "contacts who clicked but never bought" once, share it with your team, and open it whenever you need it.

FIELD	PURPOSE
Name / Description	Name it for the question it answers.
Entity / Dataset	Determines the available fields and measures.
Columns	The fields you want to see.
Filters	Your conditions. Date filters resolve to actual dates.
Sort	Field and direction.
Visibility	Private, selected users and roles, or everyone.

How to use it

1. Open Manage Smart Views and create a view.
2. Choose the dataset for your question.
3. Enter a name and description.
4. Select columns, filters and sort.

- 5. Check the date boundaries and whether the output is detail or summary.
- 6. Set the visibility.
- 7. Save and check a few results against the question you meant to ask.

Operations

OPERATION	WHAT IT DOES
Create with AI	Describe what you want and get a draft definition. Review the dataset, columns, filters, sort and resolved dates, then save.
Dashboard AI prompt	Resolves your request and saves a private view immediately — this one is not a preview.
Edit	Change the definition and save.
Share	Change who can see the view. Underlying data access still applies on top.
Manage Columns	Your own column preference for this view.
Delete	Removes the view. The underlying data is untouched.

9. Website tracking

9.1 Tracking Code

What it is. The snippet you add to your website, plus guides for recording page views and custom events, identifying known visitors, running website actions, capturing contacts and attributing website activity to your emails.

Why you need it. It closes the loop between a campaign and what people did next, and lets your website feed the product directly.

How to use it

1. Review Tracking Settings and your Allowed Domains first.
2. Copy the Install Snippet generated for your site.
3. Have your developer place it once in your shared site layout, ideally before the closing body tag.
4. Load a tracked page, then check Events for a page view and Visitors for the activity.
5. Check Tracking Health for ingestion problems.

Choosing the right integration

WHAT YOU WANT	HOW IT IS DONE	HOW YOU CONFIRM IT
Page views	Install the snippet and leave Auto Page View on	A <code>page_view</code> event appears for your site
A business event	Your developer calls <code>window.CraTracking.track</code> with a stable event name	The named event appears in Events
Recognise a known visitor	Identify them only once your site reliably knows who they are	Visitors shows the linked contact
Change a list or campaign from the website	Create an Action Definition and invoke its key	Action Executions records it and the contact's membership changes
Capture a form submission	Create a Contact Form mapping and submit through its key	Contact Submissions records the capture
Attribute website activity to an email	A tracked email link landing on the instrumented site	Email touch evidence appears

Good to know. Always copy the snippet from your own account — it is site-specific. Installation is confirmed by data arriving, not by the snippet being in place. When handing over to a developer, give them the snippet, the approved domains, your event naming rules and only the specific action or form keys they need.

9.2 Tracking Settings

What it is. Your site's collector domain, cookie domain, automatic page-view behaviour and tracker status.

Why you need it. It controls whether tracking runs at all, and whether page views are recorded automatically or only when your developer asks.

FIELD	RULES
Auto Page View	Required. On by default. Turn off only if your developer records page views manually, or you will count them twice.
Status	Required. Active by default.
Collector Domain	Required, up to 255 characters. Must be one of the domains available to your account.
Cookie Domain	Optional, up to 255 characters. Agree the scope with your developer.

How to use it. Open Tracking Settings, review Auto Page View and Status, choose a Collector Domain, confirm the Cookie Domain, then Save Settings and reload to check the values persisted. Review Tracking Code and your website installation after any change.

Good to know. If a previously saved collector domain is no longer offered it shows as unavailable and must be replaced before you can save — the message is *Choose one of the domains available for this account*. Keep a note of the previous settings before changing them.

9.3 Allowed Tracking Domains

What it is. The list of websites permitted to send tracking data to your account.

Why you need it. It stops anyone else's site — or a copied snippet — writing into your data.

FIELD	RULES
Name	Required, up to 255 characters. Something readable like "Production website".
Domain	Required, up to 255 characters. A hostname such as <code>example.com</code> , or a wildcard such as <code>*.example.com</code> . Trimmed and lowercased on save.
Status	Required. Active by default.

How to use it

1. Open Allowed Domains and check the existing entries to avoid a duplicate.
2. Create an entry with a clear name and the hostname.
3. Choose the status and save.
4. Reopen and check the normalised hostname.
5. Confirm traffic is accepted during your next installation test.

Operations. Create, edit, change status and delete. Before deleting, work out which website installation depends on the entry.

Good to know. Enter a hostname, not a full page address — the validation message is *Enter a valid domain like example.com or *.example.com*. Single-label local names are rejected. Wildcards match host patterns, so confirm your exact pattern behaves as you expect during testing rather than assuming it covers every variation.

9.4 Website Action Definitions

What it is. A saved effect that a website interaction can trigger — adding or removing a contact from a campaign or list, or applying an attribute.

Why you need it. It lets your website change your audience directly. Someone clicks "notify me about X" and they are on that list, with no export, no import and no delay.

FIELD	RULES
Name	Required, up to 255 characters. Describe the business effect.
Action Key	Generated by the system, up to 120 characters. Copy it after reviewing the action; you cannot choose your own.
Mutation Type	Required. Add or remove campaign, add or remove list, or add or remove attribute.
Campaign / List / Attribute Group and Attribute	Required depending on the mutation type.
Status	Required. Active by default.
Configuration JSON	Defaults to <code>{}</code> . Must be valid JSON.

How to use it

1. Open Action Definitions and create an action.
2. Enter a clear name.
3. Choose the Mutation Type *before* the target.
4. Complete only the target fields relevant to that type.
5. Review the status and any advanced configuration, then save once.
6. Reopen the saved action and copy its Action Key.
7. Give the key and the intended trigger to your developer.
8. After an authorized test, check Action Executions and the contact's membership.

Good to know. The Action Key stays the same even when you change what the action does, so review every page using it before changing the target. Choosing a new mutation type clears the previous target, which needs reselecting. Saving the definition changes no contact — the effect happens when your website invokes the key.

9.5 Website Contact Forms

What it is. A mapping from your website form's fields to a contact record, which can also run linked actions after a successful submission.

Why you need it. Enquiries and sign-ups become contacts automatically, already on the right list, without anyone rekeying them.

FIELD	RULES
Name	Required, up to 255 characters.
Status	Active by default.
Form Key	Generated after saving. Copy it for your developer.
Email mapping	Required. The exact field name your website sends.
First Name / Last Name / Phone / Company	Optional. Only map what your form actually sends.
Custom attribute mapping	Optional rows, each needing both an attribute and a website field name.
Linked Action Definitions	Optional. These change lists, campaigns or attributes after capture.

How to use it

1. Open Contact Forms and create a definition.
2. Enter the name and status.
3. Map Email to the exact field name your website sends.
4. Map the other standard fields your form collects.
5. Add custom attribute mappings, completing both halves of each row.
6. Select linked actions whose effects you want.
7. Save and wait for *Contact form saved successfully*.
8. Copy the Form Key from the edit screen.
9. Give your developer the key and the mapped field names.
10. After a test submission, check Contact Submissions and the linked-action results.

Operations. Create, edit, change status and delete. Status and deletion are separate — identify which websites use a key before deleting its definition.

Good to know. The field name your site sends is often not the label a visitor sees, so confirm it with your developer; changing a visible label does not change the submitted field name. Creating the definition does not create a contact.

9.6 Website Visitors

What it is. The people browsing your site, in three views — all visitors, known visitors linked to a contact, and unknown ones.

Why you need it. It shows what a contact looked at before they replied, and how much anonymous interest you have that has not converted.

How to use it. Open the view matching your question, then read Visitor Key, Last Session Key, Last Contact Key, Consent, First and Last Page URL, and First and Last Seen together.

Good to know. Consent is its own field — do not infer it from the presence of a contact link. A visit, a session, an event and a contact are four separate records.

9.7 Tracking Health

What it is. A dashboard of tracking volumes plus an ingestion log.

Why you need it. It is the first place to look when website data seems wrong, and it distinguishes "nothing arrived" from "something arrived and was rejected".

CARD	COUNTS
Visitors, Sessions, Events, Email Touches	Recorded volume
Action Definitions, Contact Forms	How many you have configured — not how many have run
Action Executions, Contact Submissions	How many have actually run
Blocked Domains	Requests rejected because the sending domain is not allowed
Invalid Tokens	Requests rejected because a landing token was not valid

Common investigations

WHAT YOU SEE	WHAT TO CHECK
Blocked Domains rising	Compare your allowed-domain entries against the domain actually sending. Do not add an unfamiliar domain just to clear the warning.
Invalid Tokens rising	Look at the logged context and the tracked-link landing flow. Never copy live tokens into support material.
Events arriving but no Action Executions	Recording an event and invoking an action are different. Confirm your site invokes the action key.
Contact Forms configured but no Submissions	A saved definition is not a submitted form. Check the integration and any captured errors.
Card unchanged after Refresh Logs	Refresh Logs updates the log grid only. Reload the page for fresh card totals.

Good to know. The cards are counts, not percentages, and they ignore any date range selected elsewhere — so a report filtered to last week will not match them. Zero is a legitimate result on a new site.

10. Results and reporting

 **AI-assisted reporting is coming to this area.** You will be able to ask for a report in plain language and get it built for you, the same way Smart Views already works.

Every screen in this section is a filterable, sortable grid with Manage Columns, Refresh and — where your permissions allow — Export. Section 12 covers those controls. What follows is what each screen is for, the columns that matter, and the operations unique to it.

YOUR QUESTION	SCREEN
Is this campaign running healthily?	Campaign Runtime Overview
Where has this person got to?	Journey Progress
Which way did a decision send them?	Journey Outcomes
What happened to this email?	Email Deliveries
Who opened it?	Email Opens
Is that open genuine?	Email Open Audit
What did they click?	Link Clicks
Why was a link blocked?	Journey Link Security
What happened to this text message?	Mobile Message Deliveries
Did anyone reply?	Contact Mobile Replies
Which A/B variant won?	Experiment Assignments
Did my trigger fire?	Trigger Executions
Did my test send work?	Test Email Logs, Test Message Logs

10.1 Campaign Runtime Overview

What it is. A single summary of a running campaign: its published version, how many contacts are at each stage, delivery totals, where people are concentrated, recent events and recent failures.

Why you need it. It is the one screen that tells you whether a live campaign is behaving, without reading thousands of individual records.

SECTION	SHOWS
Campaign summary	Engine, Publish Status, Active Version, Campaign UUID — confirm which version you are looking at before reading anything else.
Enrollments	Total, In Progress, Waiting, Decision Pending, Move Pending, Completed, Failed, Exited.
Delivery states	Scheduled, Handed Off, Delivered, Opened, Clicked, Bounced, Unsubscribed, Excluded, Suppressed, Failed.
Top Current Steps	Where in-flight contacts are concentrated.
Recent Journey Events	A recent sample, not the complete history.
Recent Delivery Failures	A recent sample. Use Email Deliveries for the full picture.

How to use it

1. Open Runtime Overview for the campaign.
2. Confirm the campaign identity, engine, publish status and active version.
3. Read the enrollment counts and the delivery counts as two separate stories.
4. Check Top Current Steps to find where people are gathering.
5. Open Journey Progress or Email Deliveries for the detail.

Good to know. Enrollment counts describe people moving through the journey; delivery counts describe individual messages. They are different populations and are not meant to add up to each other. *Runtime data is not available* is an explicit state — it does not mean everyone finished successfully. Never activate or republish a campaign just to fill this screen.

10.2 Journey Progress

What it is. Every contact's position in a journey — current step, when it next runs, the current action and the latest event.

Why you need it. When someone asks "why hasn't my customer had the email yet?", this answers it per person.

Columns. Campaign Name, Contact Name, Contact Email, Source List, Run Number, Enrollment Status, Current Step, Step Type, Next Run At, Current Action Status, Latest Event, Latest Event At, Entered At and Updated At are shown by default. Source, Current Action Channel, Current Action Scheduled At and Last Error are available through Manage Columns.

How to use it

1. Find the campaign and the contact or their email address.
2. Check Source List, Run Number and Source to distinguish repeat enrollments.
3. Read Enrollment Status, Current Step and Step Type together.

4. Check Next Run At and Current Action Scheduled At *before* concluding anything is stuck.
5. If there is an action in progress, compare its channel and status with the relevant delivery screen.
6. Read Latest Event, Latest Event At and Last Error, then follow the links you have access to.

Good to know. A contact sitting in Waiting is usually working exactly as designed — a wait step doing its job. Changing a campaign is a separate operation and may not affect contacts already in flight.

10.3 Journey Outcomes

What it is. How each decision and campaign move resolved — the branch taken, what decided it, and the target campaign where relevant.

Why you need it. It shows whether your branching logic splits the audience the way you intended, which is hard to judge from the canvas alone.

Columns. Outcome Family, Campaign, Contact, Contact Email, Source Step, Decision Type, Resolved Branch, Resolution Source, Target Campaign, Status, Started / Requested At, Resolved / Completed At, Last Error, Created At and Updated At. Category, Publish Status, Audience Mode and Start Mode are available through Manage Columns.

How to use it. Filter by campaign and decision type, then compare resolved branches across contacts to see the real split. Read Resolution Source to understand what decided each one.

10.4 Email Deliveries

What it is. The complete lifecycle of every journey email — scheduled, handed to the provider, delivered, engaged with, suppressed, excluded, cancelled or failed — with the reason attached.

Why you need it. It is the definitive answer to "did this person get this email", and it tells you why when they did not.

Columns. Campaign Name, Stage/Step Name, Email Name, Contact Name, Recipient Email, From Email, Reply-To, Subject, Status, Failure / Skip Reason, Scheduled At, Sent At, Delivered At, Last Activity At, Opened, Clicked and Unsubscribed are shown by default. Attempt Count, Last Error, Updated At, Track Code, Provider Name, Provider Message ID and Source Type are available through Manage Columns.

Investigating a delivery

1. Filter by campaign, contact, recipient, status or time.
2. Choose **View Email** on the row to see exactly what was sent.
3. Review sender, recipient, status, scheduled time, Sent At, Delivered At and Failure / Skip Reason.
4. Open **Advanced Details** only when support needs provider identifiers, the raw error, headers, BCC or preview diagnostics.
5. Close the drawer to return to the list.

The preview renders the email safely and does *not* record an open, click or unsubscribe, so you can investigate freely. Email Name opens the source email in the editor — that shows the content as it is now, which may differ

from what was sent.

Retrying failed or bounced email

1. Open the Failed or Bounced view. Retry is not offered on Suppressed, Excluded, Cancelled, Delivered, Scheduled or Sent.
2. Select rows and choose **Retry Selected** — up to 100 rows — or choose **Retry All Failed** or **Retry All Bounced**, which covers the whole tab rather than the visible page, up to a configured limit of 5,000 by default.
3. Read the preview drawer: how many matched, how many are eligible, how many will be skipped, and any limit warning.
4. Check skipped inactive contact emails through the links provided — up to 20 are listed.
5. Enter the required Admin Note explaining the retry.
6. Confirm. Eligibility is rechecked before anything is resent.
7. Review the result and the refreshed tab counts, then follow the rows through normal processing.

Good to know. Retry keeps the delivery's identity, attempt history, tracking code and audit trail. Requeued is not delivered — watch the rows afterwards. A retry does not clear suppressions, and a contact whose address is blocked or inactive still will not receive it. Bounce recovery can clear matching bounce blocks under its own safeguards, but other blocks still apply.

10.5 Email Opens

What it is. The deliveries that recorded an open, with the campaign, email, contact and what happened afterwards.

Why you need it. It is your headline engagement view — who is reading, and whether they went on to click or unsubscribe.

Columns. Campaign Name, Stage/Step Name, Email Name, Contact Name, Recipient Email, Subject, Delivered At, Opened At, Clicked At, Unsubscribed At and Provider Name by default. Category Name, Status, Clicked, Unsubscribed, Attempt Count, Last Error, Updated At, Track Code, Provider Message ID and Source Type are available through Manage Columns.

10.6 Email Open Audit

What it is. The underlying open signals with a classification, a reason, and the browser and network context behind each one.

Why you need it. Mailbox providers and security scanners open email automatically. This screen separates those from genuine human opens, so your open rate means something.

Columns. Campaign Name, Stage / Step Name, Email Name, Contact Name, Recipient Email, Opened At, Classification, Classification Reason, IP Address, Browser / OS and Signal Source by default. Browser Name and Version, Operating System, Robot, Mobile, Tablet, Secured, Track Code, Delivery ID, Provider Name, Provider Message ID, Campaign UUID, Contact UUID and Updated At are available through Manage Columns.

How to use it. Start in Email Opens for the headline. When a number looks surprising, come here and read Classification alongside Classification Reason and Signal Source. The robot, mobile, tablet, security and IP fields give supporting context — they are indicators, not proof of intent.

10.7 Link Clicks

What it is. Engagement per tracked link — destination, total clicks, and first and last click times.

Why you need it. Clicks tell you what people actually wanted, which is more useful than knowing they opened.

Columns. Campaign Name, Stage / Step Name, Email Name, Link Label, Destination URL, Contact Name, Recipient Email, Total Clicks, First Clicked At, Last Clicked At, Delivered At and Opened At.

How to use it. Compare destinations within a campaign to see which call to action worked. A companion view scoped to a single contact is also available.

10.8 Journey Link Security

What it is. Tracked-link requests that were blocked, with the outcome, token status and reason.

Why you need it. It explains the rare case where a recipient says a link did not work.

Columns. Campaign Name, Stage / Step Name, Email Name, Link Label, Destination URL, Contact Name, Recipient Email, Hit Outcome, Token Status, Blocked Reason, IP Address, Browser / OS, Robot and Hit At by default. Token ID and Hash, Delivery ID, Link ID, Token Click Count, First and Last Clicked At, Expires At, Throttle Until, Blocked At, Redirect Host, Mobile, Tablet, Secured and Updated At are available through Manage Columns.

How to use it

1. Find the link and the time it was reported.
2. Read Hit Outcome and Blocked Reason before Token Status.
3. Check Expires At, Throttle Until and Token Click Count where available.
4. Compare the destination and redirect host against your intended content.
5. Capture the context for support, without exposing token values or live recipient links.

Good to know. Do not click a live tracked link to test it — that records engagement against the contact and can create further security events.

10.9 Mobile Message Deliveries

What it is. Mobile message processing and provider outcomes.

Why you need it. Mobile has two sources of truth — what the product did and what the carrier reported. Seeing both is how you diagnose a delivery problem rather than guess at it.

Columns. Campaign Name, Stage/Step Name, Mobile Message, Contact Name, Recipient Phone, Processing Status, Provider Status, Scheduled At, Handed Off At, Provider Status At, Callback Received At, Attempt Count,

Last Error and Updated At by default. Failed At, Provider Name, Provider Message ID, Provider Error Code and Message, Segments, Sender, Test Mode, Channel and Source Type are available through Manage Columns.

How to use it. Read **Processing Status** (the product's own pipeline) next to **Provider Status** (what the carrier reported). Handed Off At is when the message left; Provider Status At and Callback Received At distinguish when the carrier acted from when the product heard about it. Use Attempt Count with the provider error fields when investigating a failure.

Good to know. Check Test Mode before concluding which number was actually used. Channel and Sender help when diagnosing fallback behaviour.

10.10 Contact Mobile Replies

What it is. Inbound mobile replies matched to a contact's phone number, with the reply text, classification and subscription outcome.

Why you need it. Mobile opt-outs arrive as replies. This is where you see them, and where you confirm the product acted on one.

Columns. Contact Name, Contact Email, Phone Number, To / Sender Phone, Reply Text, Reply Type, Matched Keyword, Messaging Status, Provider and Received At by default. Keyword Source, Subscription Status, Processed At, Last Error and Attempt Count, Media Count, Provider Message ID, Messaging Service SID, match details and before/after messaging status are available through Manage Columns.

REPLY TYPE	WHAT IT MEANS
Opt Out	The reply was recorded as an opt-out.
Opt In	The reply was recorded as an opt-in.
Failed	Subscription processing failed.
Pending	Subscription processing is still in progress.
Normal Reply	None of the above — an ordinary message.

Good to know. Only replies matched to a known contact phone appear here. A normal reply is a message, not consent — check Messaging Suppressions for the current position. Inactive contacts and phone numbers stay visible for historical review.

10.11 Test Message Logs and Test Email Logs

What it is. Records of your test sends — the source content, the recipient, the sender, the status and any failure reason.

Why you need it. When a test does not arrive, these say whether it left the building.

Test Message Logs columns. Source Type, Source Name, Recipient Mode, Recipient Phone, Channel, Send Status, Provider Message ID, Failure Reason and Created At by default, with UUIDs, rendered text, test mode,

sender profile, provider status, request source and audit fields available through Manage Columns.

Test Email Logs columns. Source Type, Source Name, Recipient Email, Subject, Send Status, Request Source, Failure Reason and Created At by default, with From Name, From Email, Reply To, source identifiers and Last Updated available through Manage Columns.

Good to know. Opening a log does not send another test. Check your filters and the previous attempt before resending.

10.12 Experiment Assignments

What it is. Who received which A/B variant, which won and why, and the engagement behind that decision.

Why you need it. It makes your testing auditable — you can show why a winner was chosen rather than asserting it.

Columns. Campaign, Experiment, Contact, Contact Email, Cohort, Variant Bucket, Winner Variant, Decision Criteria, Assignment Status, Sample Action Status, Winner Action Status, Assigned At, Completed At, Delivered, Opened, Clicked, Last Error, Created At and Updated At by default. Category, Publish Status, sample and winner scheduling, Handed Off, Bounced, Failed and Unsubscribed are available through Manage Columns.

10.13 Trigger Executions

What it is. Each campaign trigger run — when it was due, when it fired, whether anything changed, and whether it produced duplicates or failures.

Why you need it. It proves a rule did or did not fire, which is otherwise very hard to demonstrate.

Columns. Campaign Name, Contact Name, Contact Email, Trigger, Trigger Type, Trigger Action, Status, Resolution Source, Due At, Fired At, Changed, Has Duplicates, Has Failures, Last Error, Created At and Updated At. Source Stage and Source Email are available through Manage Columns.

Good to know. *Changed* is the column that matters most — a trigger can fire correctly and change nothing because the condition was already satisfied.

11. Consent and suppression

11.1 Email Suppressions

What it is. The list of email addresses currently blocked, with the reason — unsubscribe, bounce, or a manual block — and the controls to lift a block where that is appropriate.

Why you need it. It is the safeguard that stops you emailing someone who asked you not to, or an address that no longer exists — protecting both your relationship with that person and your sending reputation.

Columns. Email, Contact Name, Reason, Source, Suppression Details, Contact Email Status, Status, Suppressed At and Last Updated by default. Normalized Email, Contact Email, Provider, Provider Message ID, Email Subject, Removed At, Removed By, Admin Note and Source ID are available through Manage Columns.

Lifting a block

1. Find the address and read its Reason, Source, Suppression Details and Contact Email Status.
2. For an **unsubscribe or manual** block, choose **Remove Suppression**. An admin note is optional.
3. For a **bounce**, choose **Allow Sending Again**. An admin note is **required**.
4. Review the confirmation drawer and the effect it describes.
5. Confirm, then refresh and re-check the address.
6. Switch the Status filter to Inactive to see the history.

Lifting blocks in bulk

1. Select the active rows you want.
2. Choose Remove Suppression for unsubscribe and manual rows, or Allow Sending Again for bounce rows.
3. Read the drawer's selected, processed and skipped counts — a mixed selection is not fully handled by either action.
4. Provide the admin note when clearing bounces.
5. Confirm, then review the skipped rows rather than assuming everything succeeded.

Good to know. The screen shows active suppressions by default. Lifting a block marks the history inactive rather than erasing it, which is what makes the record defensible later. Clearing one reason does not clear others, so recheck the address before expecting a campaign to reach it. Inactive, missing and wrong-type rows are skipped in bulk. This screen does not create manual suppressions. Only lift an unsubscribe when you have a genuine reason — such as the person asking to resubscribe.

11.2 Messaging Suppressions

What it is. Blocked phone numbers, with the reason and source, the inbound reply that caused the block, and the contact's current messaging eligibility.

Why you need it. Mobile opt-outs usually arrive as a reply. This is where that reply becomes a permanent, checkable block.

Columns. Phone Number, Contact Name, Contact Messaging Status, Reason, Source, Inbound Reply and Reply Received At by default. Normalized Phone, Contact Phone, Provider Message ID, Status, Created By, Created At and Updated At are available through Manage Columns.

11.3 Unsubscribe Events

What it is. Each unsubscribe, with the contact, email address, campaign, stage, email, delivery and action it came from.

Why you need it. It tells you your unsubscribe rate and exactly which content drove it.

Columns. Unsubscribe Time, Unsubscribe UUID, Source Type, Contact, Email Address, Campaign, Stage, Email, Sent Time, Delivery ID, Action ID and Has Feedback. Internal identifiers and Status are available through Manage Columns.

How to use it. Filter by campaign and time to find where unsubscribes cluster. The *Has Feedback* column shows which ones left a comment, which you then read in Unsubscribe Feedback.

11.4 Unsubscribe Feedback

What it is. The reason and any free-text comment people gave when unsubscribing.

Why you need it. The events tell you the rate; the feedback tells you the cause. Together they show whether a campaign is driving people away and what they said about it.

Columns. Feedback Time, Unsubscribe UUID, Contact, Email Address, Campaign, Reason, Other Text, Submitted IP and User Agent. Internal identifiers and Updated At are available through Manage Columns.

How to use it. Filter by campaign and group by Reason to find patterns. Read the Other Text entries — that free text is usually where the actionable insight is.

12. Working with any screen

These controls appear across the product. The feature sections assume them rather than repeating them.

12.1 Lists and grids

CONTROL	WHAT IT DOES
Column filters	Narrow the list. Text filters match on words, dropdown filters offer set values, and date and number filters take a range. Clear a filter deliberately — an empty result is often a filter, not missing data.
Sorting	Click a sortable column heading. Not every column can be sorted; those holding long free text usually cannot.
Page Size	How many rows show at once, typically 10, 50 or 100.
Manage Columns	Choose which columns appear. Your choice is remembered for you and does not change what colleagues see.
Refresh	Reloads the current list with the filters you already have applied.
Export	Downloads the current result where your permissions allow it. Export respects your filters, so narrow the list first.

12.2 Selecting records

Selection carries across pages. If you select rows, move to page two and select more, all of them stay selected. Always read the selection count rather than counting the rows in front of you.

Where a screen offers bulk actions, it names the scope explicitly:

- **Selected** — the records you ticked, wherever they are in the list.
- **Filtered** — every record matching your current filters, which can be far more than you can see.

The action drawer states which scope it will use and how many records that is, before you confirm. If you have neither a selection nor meaningful filters, no bulk action is offered.

12.3 Creating, editing and saving

Two patterns run through the product:

- **Creating something new** — your entries and any related selections are held together and stored when you Save.
- **Editing something existing** — the detail fields need Save, but relationship changes (adding a contact to a list, applying an attribute, removing a member) apply as soon as you confirm them.

Where a screen warns you about unsaved changes when you leave, read it — that warning covers the form fields, not relationship changes you already confirmed.

12.4 Status, deletion and defaults

Most records have an **Active / Inactive** status. Inactive generally removes something from new selections while leaving existing uses working. It is the reversible alternative to deleting.

Records in use are protected from deletion. The product checks first and tells you what depends on the record. If you delete several at once and one is protected, none are deleted — fix the selection and try again. There is no undo for a completed deletion.

Some records can be marked as the **default** — one brand kit, one campaign category. Setting a new default clears the previous one, and a current default cannot be deleted or deactivated until another takes its place.

12.5 Dates and times

You enter and read schedules in your own timezone and the product converts them for processing. The scheduling screen shows which timezone it is using; it is worth a glance before scheduling anything that matters.

13. Reference

13.1 Personalization tokens

KIND	FORM	SCOPE
Contact custom field	<code>{{contact.custom.preferred_topic}}</code>	A different value for each contact
System custom field	<code>{{system.site.custom.support_url}}</code>	One value shared across your whole site
System default field	<code>{{system.site.company_name}}</code>	Built-in site information

Always copy the token from the picker or the management grid rather than typing it from a label.

13.2 Limits and defaults

ITEM	VALUE
Campaign name, category, attribute, attribute group name	200 characters
Campaign and category description	1,000 characters
Custom field label	188 characters
Custom field variable name	64 characters, locked after creation
Tracking name and domain	255 characters
Action key	120 characters, generated
Brand kit logo	5 MB per logo
SMS message	1,600 characters maximum
MMS / RCS image	JPG, JPEG, PNG or GIF; 5 MB; one image per message
RCS title / description	200 / 1,600 characters
RCS call-to-action buttons	Up to 2, label up to 20 characters
Import preview	5 rows by default
Contact bulk update, filtered scope	10,000 records by default
Retry Selected	100 rows
Retry All	5,000 rows by default
Skipped addresses listed in a retry preview	Up to 20

13.3 Messages you may see

MESSAGE	WHAT TO DO
Attribute Group Name is required.	Enter a name — spaces alone are trimmed away.
Meta Type is required. / Please select a valid Meta Type.	Choose one of the five types explicitly.
One or more Attributes are invalid.	Reload the form and reselect — an option has changed.
This Attribute Group is assigned to contacts or contact lists and cannot be deleted.	Resolve the contacts or lists using it first.
Please select at least one Attribute Group.	Every attribute needs a group.
Variable Name must start with a letter and contain only lowercase letters, numbers, and underscores.	Use a name like <code>preferred_topic</code> .
Variable Name has already been taken.	Choose a different identifier.
Please add at least one option for Drop Down List or Radio Button List.	Add an option, or change the input type.
Values cannot be same for more than 1 Option.	Give each option a distinct stored value.
Set another brand kit as default before deleting / deactivating this one.	Make another kit the default first.
Start date is required. / End date is required.	Complete the schedule.
End date must be on or after the start date. / End date cannot be in the past.	Correct the dates and check the timezone.
Schedule date must be in the future.	Correct the date and time for a scheduled send.
Please choose contacts or contact lists.	Select at least one audience source.
From email / Reply-to email must be an authorized sender address.	Choose an approved address.
Choose a valid action type. / Choose the campaign, list, attribute group or attribute this action should use.	Complete the target for the mutation type you chose.
Enter valid JSON or leave the default {} value.	Correct the advanced configuration.
Choose an attribute / Enter the website field name for custom mapping row ...	Complete both halves of the mapping row, or remove it.
Enter a valid domain like example.com or *.example.com.	Enter a hostname, not a full page address.
Choose one of the domains available for this account.	Select a currently offered collector domain.

MESSAGE	WHAT TO DO
ADDR Run Now is not enabled on this site. / Run Now is available only for ADDR actionable triggers.	Use execution history instead; do not substitute another rule type.
List / Campaign could not be assigned. Please try again.	Refresh the tab, confirm the current assignment, then retry.
Tracking IP geo provider not found.	Confirm the site and the entry you are editing.

13.4 Things that cannot be undone

- A completed deletion — of a contact, list, attribute, field, template, email, message, campaign or tracking definition.
- An applied import. Valid rows are saved as they process.
- A sent or scheduled Send Once, once you confirm it.
- An activated campaign's first sends, once processing begins.
- A removal of list membership in edit mode, once confirmed.
- Regenerating an inbound reply webhook address.

In each case, making something inactive is the reversible alternative where you only need to stop it being used.

14. Getting help

Most questions resolve from the product itself. The Results screens show what happened to a message; the consent screens show why one was not sent; Tracking Health shows whether website data is arriving.

When you raise a case, including these makes it quick to resolve:

- The screen you were on and its address.
- What you were trying to do.
- What you had selected — one record, several, or a filtered set with its count.
- Roughly when it happened, and the timezone you were reading.
- The exact message you saw.
- A reference to one affected record.
- Whether it was a validation message, a blocked action or an empty result — these have different causes.
- Whether it affected one record or a batch.

Please do not include passwords, API keys, provider secrets, webhook addresses, live tracking links or a full export of your contacts. A screenshot with sensitive details removed is usually all that is needed.

The **FAQ and Troubleshooting** guide covers the questions that come up most often, organised by what you are seeing rather than which screen you are on.