

## CRM – Designing a Dialog Flow

**Purpose:** A flow defines the sequence of actions that Online Marketing will perform after the dialog is deployed. The flow consists of a series of steps (actions) defining how you will reach the dialog's target audience and how you will handle respondents and subsequent follow-up interactions.

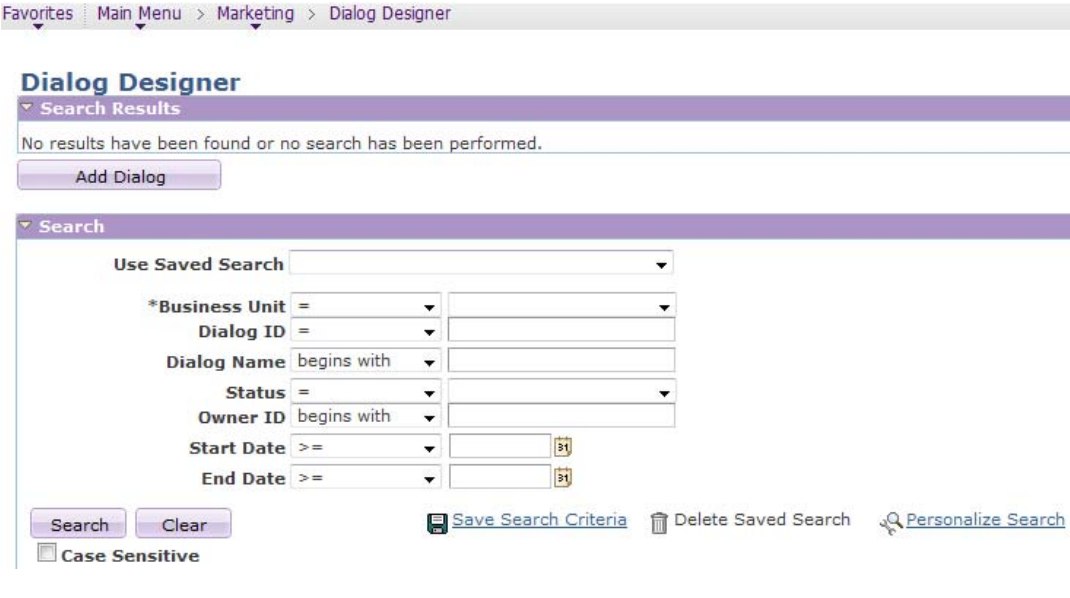
Certain actions in the flow are scheduled to occur at a specific time. Other actions are triggered by a response from an individual in the target audience, such as displaying a particular web page.

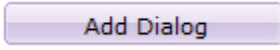


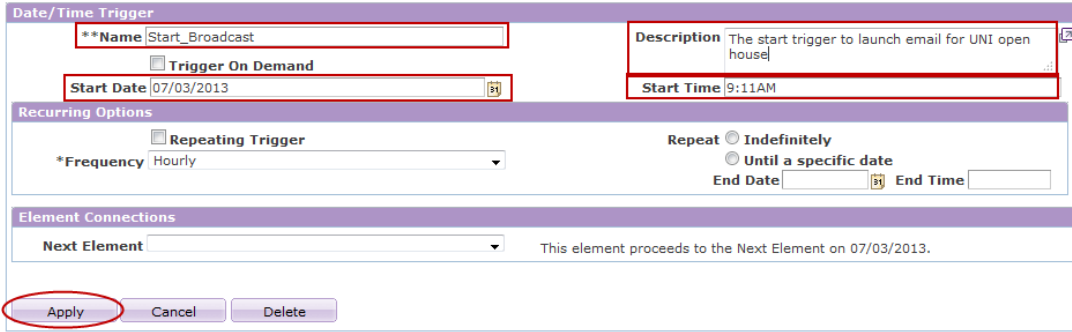
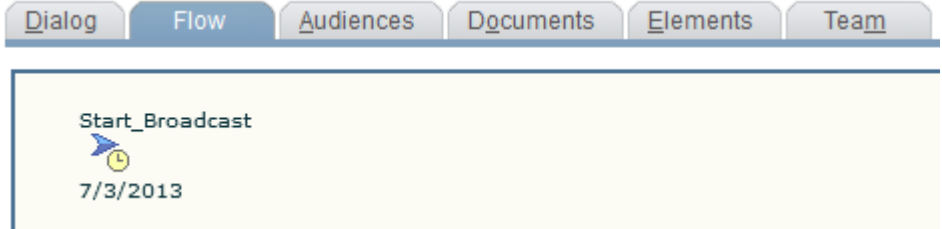

At a minimum, a dialog must have at least one trigger –either a Date/Time trigger or an External Event trigger. Date/Time triggers can have broadcast email or custom action extensions following; External Event triggers can have a Landing Page, Web Link Promo, Standalone Web Page, or Single Email.

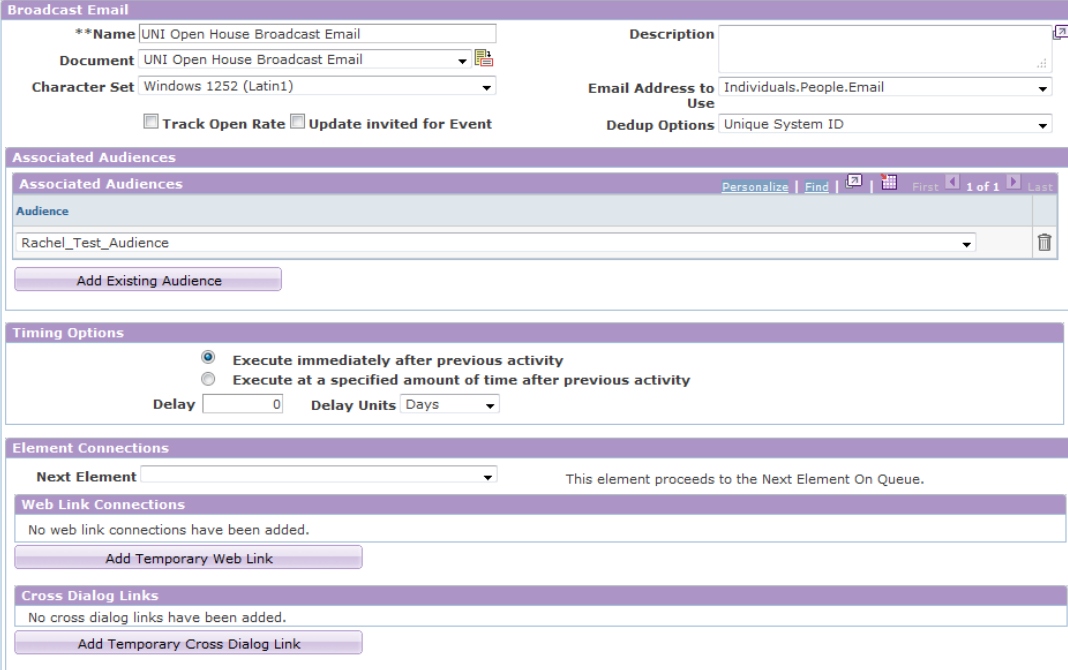
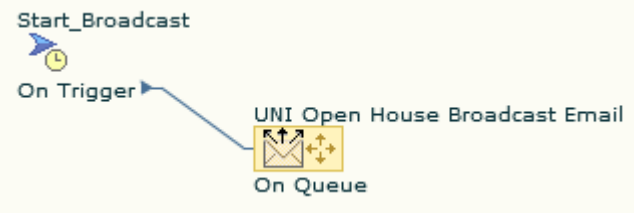
The following instructions provide examples for designing a Dialog Flow.

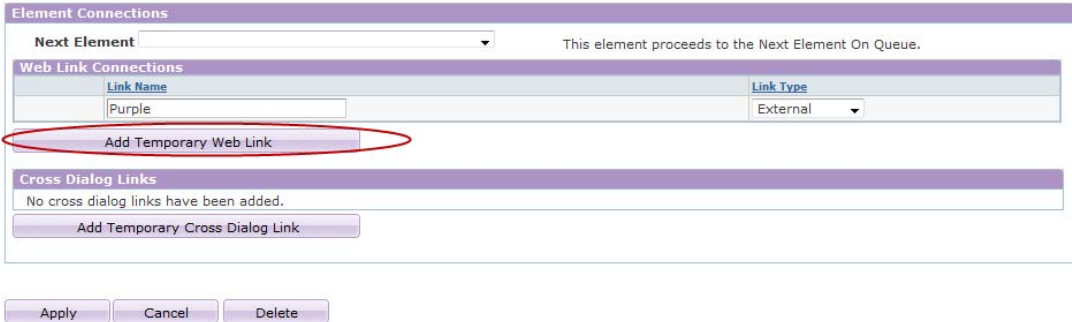
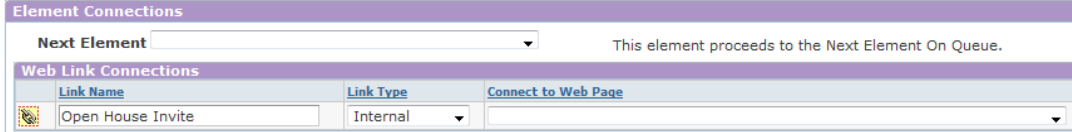
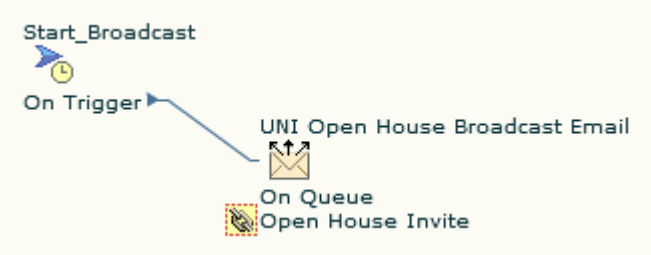
**NOTE:** Make sure you have your audience identified and any emails or web documents created before you begin designing the flow (See job aids for Creating Email and Web Documents).

**Example 1 – Simple Broadcast:** A broadcast email is sent to a target audience. The email may contain a link directing the user to a web page.

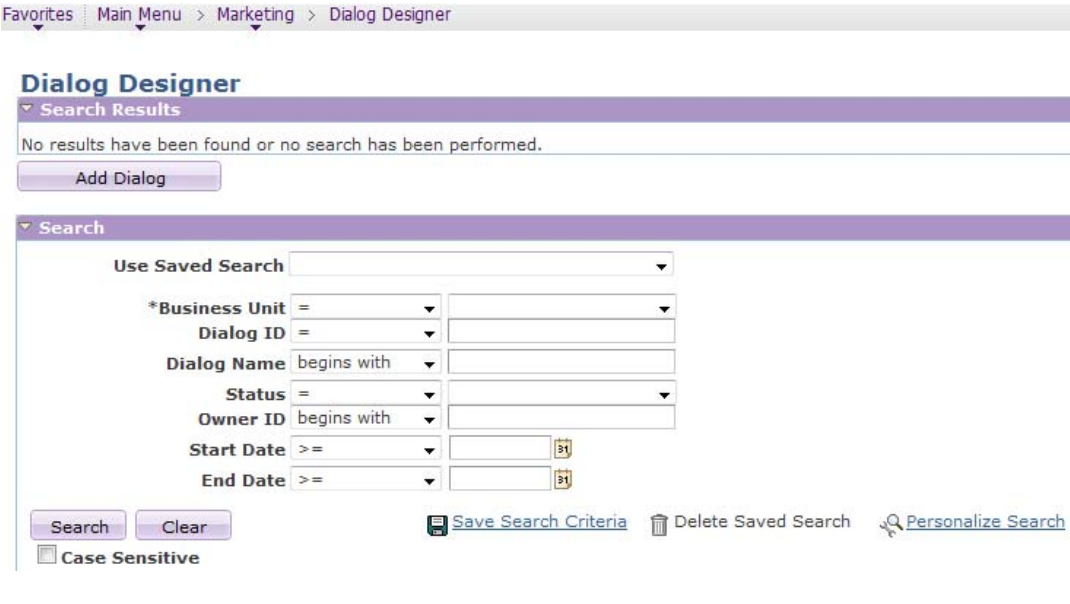
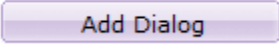


Step	Action
1.	<p>In CRM, navigate to the <b>Dialog Designer</b> page. Select <b>Main Menu &gt; Marketing &gt; Dialog Designer</b></p>  <p>The screenshot shows the 'Dialog Designer' page with a breadcrumb trail: 'Main Menu &gt; Marketing &gt; Dialog Designer'. Below the breadcrumb is a search section titled 'Dialog Designer' with a 'Search Results' dropdown showing 'No results have been found or no search has been performed.' and an 'Add Dialog' button. Below that is a 'Search' section with various filters: 'Use Saved Search' (dropdown), '*Business Unit' (dropdown), 'Dialog ID' (dropdown), 'Dialog Name' (dropdown with 'begins with' selected), 'Status' (dropdown), 'Owner ID' (dropdown with 'begins with' selected), 'Start Date' (dropdown with '&gt;=' and a date picker), and 'End Date' (dropdown with '&gt;=' and a date picker). At the bottom are 'Search' and 'Clear' buttons, and links for 'Save Search Criteria', 'Delete Saved Search', and 'Personalize Search'. There is also a 'Case Sensitive' checkbox.</p>

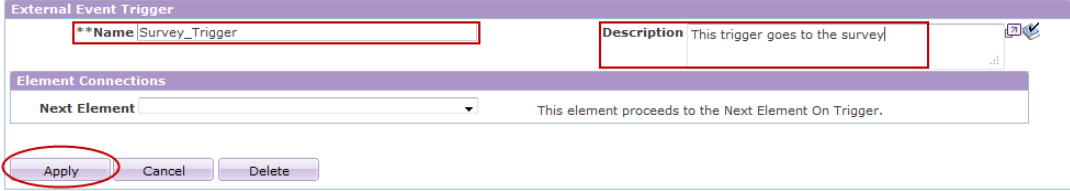
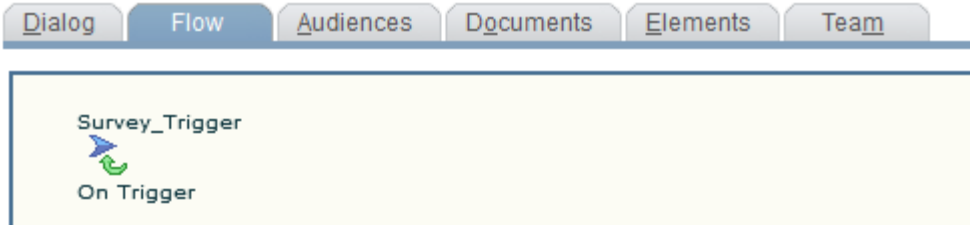
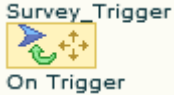

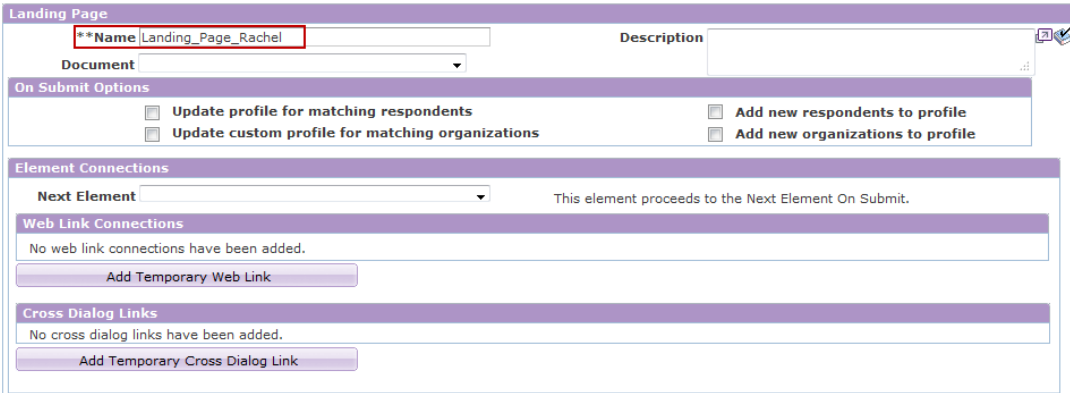
Step	Action
2.	Use the <b>Add Dialog</b> button  to create a new dialog or use the <i>Search</i> feature to find an existing dialog.
3.	Click the <b>Flow</b> tab. 
4.	Start the dialog by adding a Date/Time Trigger, which will send the target audience a broadcast email. Click the Date/Time Trigger element  from the bottom toolbar. Enter a <i>Name</i> and <i>Description</i> for the External Event Trigger. Select the <i>Start Date</i> and <i>Start Time</i> . Click the <b>Apply</b> button.  <p><b>Result:</b> The Event Trigger is added to the flow.</p> 
5.	To add a broadcast email, highlight the <b>Date/Time Trigger</b> you just added (the broadcast email element becomes available). Click the <b>Broadcast Email</b> element 

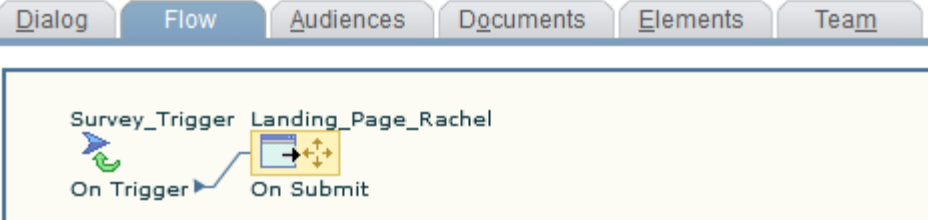

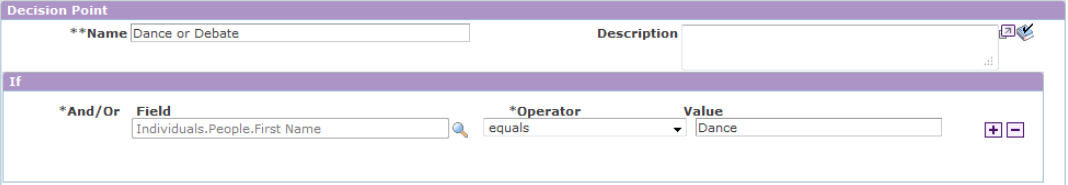


Step	Action
6.	<p>Complete the Broadcast Email details: <i>Name, Document</i> (NOTE: Document must already be created and attached to dialog), <i>Description, Audience, Timing</i>.</p> 
7.	<p>Click the <b>Apply</b> button.</p> <p><b>Result:</b> The <b>Broadcast Email</b> element is added to the Flow.</p>  <p>Tip: Drag &amp; drop elements to spread out so that it is easier to view.</p>
8.	<p>The target audience responds by viewing the email and using their browser to open a link to the specified Landing Page. Make sure the link exists first.</p> <p>Double-click the <b>Broadcast email</b> element.</p>

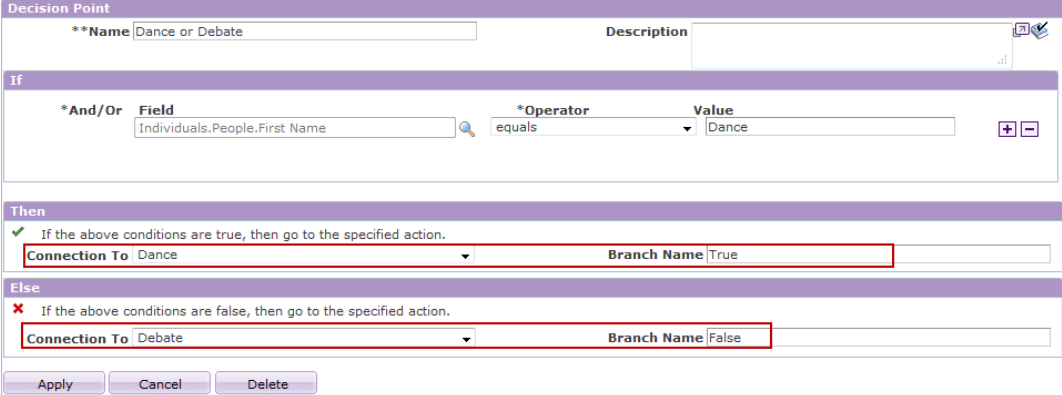
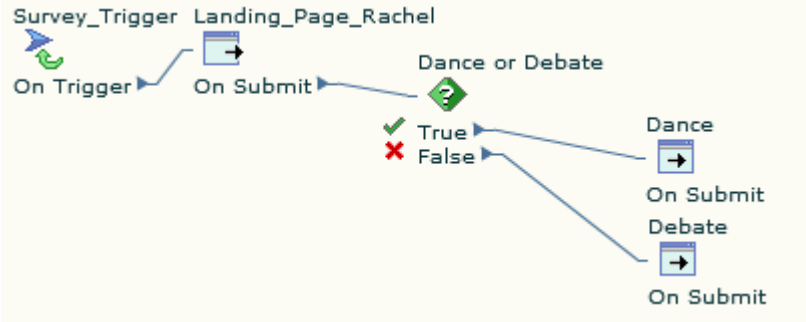



Step	Action
9.	<p>In the <i>Element Connections</i> section, click the <b>Add Temporary Web Link</b> button.</p> 
10.	<p>Enter the <b>Link Name</b>, <b>Link Type</b>, and select the appropriate value in the <b>Connect to Web Page</b> field.</p> 
11.	<p>Click the <b>Apply</b> button.</p> <p><b>Result:</b> The target audience has been directed to a link within the email.</p> 

**Example - Survey:** An External Trigger allows a target audience to respond via link to a landing page. The landing page directs the user to submit information. Based on the answers, user receives a confirmation email.

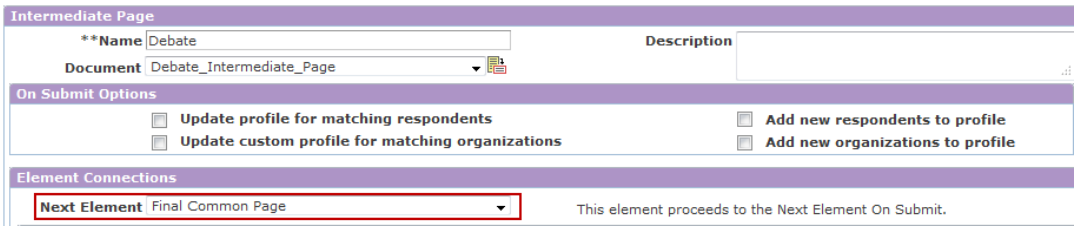
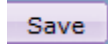
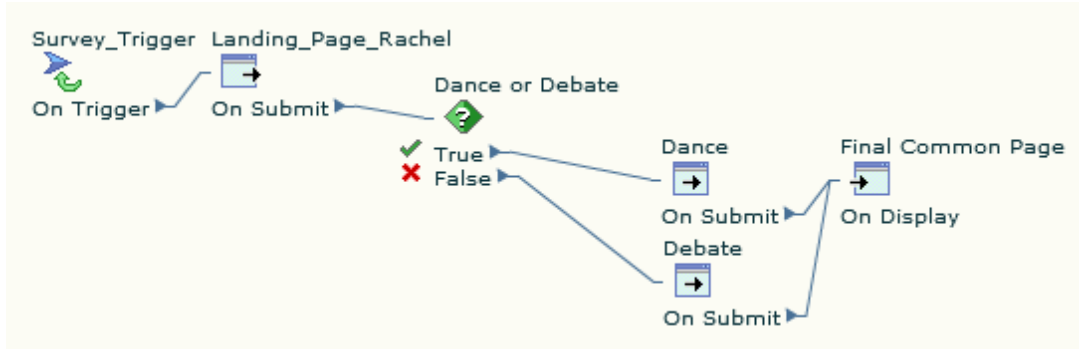


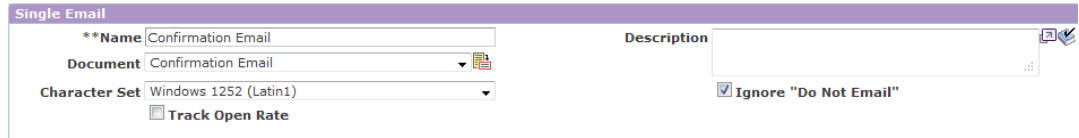
Step	Action
1.	<p>In CRM, navigate to the <b>Dialog Designer</b> page. Select <b>Main Menu &gt; Marketing &gt; Dialog Designer</b></p> 
2.	<p>Use the <b>Add Dialog</b> button  to create a new dialog or use the <i>Search</i> feature to find an existing dialog.</p>
3.	<p>Click the <b>Flow</b> tab.</p> 
4.	<p>Start the dialog by adding an <b>External Event Trigger</b>, which will send the target audience to a landing page.</p> <p>Click the <b>External Event Trigger</b>  element from the bottom toolbar.</p>

Step	Action
5.	<p>Enter a <i>Name</i> and <i>Description</i> for the External Event Trigger. Click the <b>Apply</b> button.</p>  <p><b>Result:</b> The External Event Trigger element is added to the Flow.</p> 
6.	<p>Highlight the <b>Survey_Trigger</b> element.</p>  <p><b>Note:</b> If you did not create a landing page previously, do so now by selecting the <b>Documents</b> tab, select <i>Web Document</i> from the Create New Document field, click the <b>Create</b> button.</p>
7.	<p>Click the <b>Landing Page</b> element </p>
8.	<p>Enter a <i>name</i> for the Landing Page. Select <i>Landing Page</i> document.</p> 
9.	<p>Click the <b>Apply</b> button.</p>

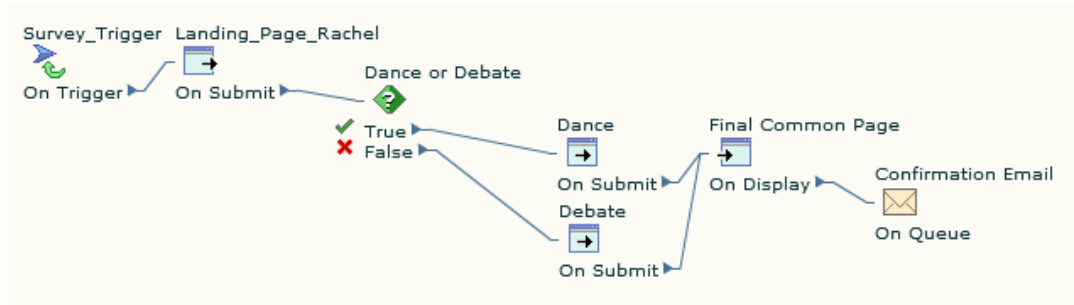
Step	Action
10.	<p>Highlight the <b>Landing Page</b>.</p> 
11.	<p>Click the <b>Decision Point</b> element </p> <p><i>Note:</i> If you did not create intermediate pages previously, do so now by selecting the <b>Documents</b> tab, select <i>Web Document</i> from the Create New Document field, click the <b>Create</b> button.</p>
12.	<p>Enter the <i>name</i> and <i>If</i> criteria.</p>  <p>Click the <b>Apply</b> button.</p>
13.	<p>Click the <b>Intermediate Page</b> element </p> <p>Enter the <i>name</i> (in this case, Dance), select the corresponding <i>Intermediate page</i> in the <b>Document</b> field.</p>  <p>Click the <b>Apply</b> button.</p>
14.	<p>Repeat step 13 for the other option(s).</p>

Step	Action
15.	<p>Return to the <b>Decision Point</b> (double-click the <b>Decision Point</b> element in the flow) to connect the <b>Intermediate page</b> elements that were added in the previous steps.</p>  <p>Click the <b>Apply</b> button.</p>
16.	<p>At this point, the flow should look like this:</p> 
17.	<p>Highlight one of the Intermediate pages.</p> 
18.	<p>Click the <b>Final Page</b> element. </p> <p><i>Note:</i> If you did not create a final page previously, do so now by selecting the <b>Documents</b> tab, select <i>Web Document</i> from the Create New Document field, click the <b>Create</b> button.</p>
19.	<p>Complete the details for the Final Page element: Enter the <i>name</i> and select the Final Page document you created, from the <b>Document</b> drop-down field.</p>  <p>Click the <b>Apply</b> button.</p>



Step	Action
20.	<p>Double-click the other Intermediate page. In the Element Connections section, select the <i>Final Common Page</i> as the <b>Next Element</b>.</p>  <p>Click the <b>Apply</b> button.</p>
20.	<p>Click the <b>Save</b> button. </p> <p>Your flow should look like this:</p> 
21.	<p>Add the confirmation email. Highlight the <b>Final Common Page</b>.</p>  <p>Click the <b>Single Email</b> element . <i>Note:</i> If you did not create a confirmation email previously, do so now by selecting the <i>Documents</i> tab, select <i>Web Document</i> from the Create New Document field, click the <b>Create</b> button.</p>
22.	<p>Complete the details for the Single Email element: Enter the <i>name</i> and select the Confirmation Email document you created, from the <b>Document</b> drop-down field.</p>  <p>Click the <b>Apply</b> button.</p>

Step	Action
23.	Final flow should look like this:



```

graph LR
    A[Survey_Trigger  
On Trigger] --> B[Landing_Page_Rachel  
On Submit]
    B --> C{Dance or Debate}
    C -- True --> D[Dance  
On Submit]
    C -- False --> E[Debate  
On Submit]
    D --> F[Final Common Page  
On Display]
    E --> F
    F --> G[Confirmation Email  
On Queue]
    
```




















Elements tab should look like this:


Dialog Flow Audiences Documents Elements Team

Element List			
Type	Dialog Element	Complete?	Connections
	Survey_Trigger	✓	Primary Connected to Landing_Page_Rachel.
	Landing_Page_Rachel	✓	Primary Connected to Dance or Debate.
	Debate	✓	Primary Connected to Final Common Page.
	Dance	✓	Primary Connected to Final Common Page.
	Final_Common_Page	✓	Primary Connected to Confirmation Email.
	Dance_or_Debate	✓	✓ True connects to Dance. ✗ False connects to Debate.
	Confirmation_Email	✓	No Primary Connection.

Save | Check | Options | Link Report | Clone | Search | Add Dialog | Top of Page

## Elements

Button	Description
	Date-Time Trigger
	External Event Trigger
	Landing Page
	Intermediate Page
	Final Page
	Standalone Page
	Web Link Promotion
	Broadcast Email
	Single Email
	Update Profile
	Decision Point
	Custom Action
	Push Lead
	Broadcast Print Correspondence
	Single Print Correspondence
	Broadcast Telesales
	Single Telesales
	Canvas Scroll (down, up, right, left)
	Canvas View (zoom in, zoom out, return to original view)

**Note:** You may delete an element from the flow by clicking on the *Elements* tab, and using the **Delete** icon  for that element.