Campaign sequence overview

This article applies to:

A campaign sequence is a scheduled series of communications and/or processes that are set in motion when a campaign goal is achieved, or a business event takes place. Campaign sequences are integrated into a larger campaign strategy. Like a campaign, a sequence is created by adding drag & drop objects onto a blank canvas. When an object is added to a sequence canvas, it automatically generates the related feature.

Timers

Timers are used to define a sequence schedule.

- **Start Timer**: The start timer is required and is already placed on the sequence canvas to mark the beginning of the sequence. A campaign sequence may include more than one communication or internal business process that run in parallel to one another (e.g., a marketing series of communications and a work flow process.) If this is the case, you may want to add additional start timers.
- Delay Timer: The delay timer determines the time that elapses between the automated communications or processes.
- Date Timer: The date timer allows you to run a step at a particular calendar date and time.
- Field Timer: The field timer runs a step based on a date field (or date/time field) in the contact record (e.g., Birthday, Anniversary, or your own custom date or date/time field.)

Communications

The communications are generally the emails sent to the contact who is progressing through the campaign. The default email settings can be changed to send a notification email to an internal staff member, an outsourced service provider, or anyone else. The communications options are the following:

- **Email**
- **Voice**
- **Fax**
- **Letter**

Processes

Process objects handle segmentation and work flow automation. They include objects that update tags, tasks, opportunities and an HTTP post to another server. These objects do not send communications directly to a contact. They keep the contact record up to date and assign responsibilities to Max Classic users.

- Apply/Remove Tag: Tags are searchable labels that are used to segment contact records and track certain contact activity. They are also used to signify goal completion in the high level campaign strategy.
- Apply Note: The note object adds a date stamped note to a contact with standardized comments. They are often used to mark a relationship milestone. These notes do not initiate any automation. They are also hidden from users so they cannot be used to manually add a contact note.

- Create Task: The task object assigns one specific responsibility to a user. The tasks are generally related to predictable events, like a welcome call after a new customer purchases. After a task is assigned, the user is responsible for manually updating it and adding a completion date.
- **Create an Appointment**: Creates an appointment on the user's calendar.
- Set Field Value: Allows you to populates a field in the contact record with a value that you set.
- Assign an Owner: This object allows you to assign an owner (a Max Classic user) to a contact record.
- Create Opportunity: The opportunity object assigns a sales process responsibility to a sales rep. The opportunity is worked over a period of time, until the deal is won or lost. Sales reps use opportunities to store sales process notes, track prospect progress through various sales stages, and keep a record of product interests and potential revenue.
- Fulfillment List: This object allows you to set up an automated fulfillment process. This is typically used for direct mail purposes, like printing labels and shipping free gifts.
- Create an Order: Creates an order that you can set to autocharge, or you can send a payable invoice, or send an invoice without a payment option.
- Send HTTP Post: The HTTP Post object sends information from Max Classic to an outside web page to trigger a script. The script may add or update members in a membership site, process the posted information and feed updates back into Max Classic, and more.

Notes

The notes object can be used to document the purpose of a sequence, the intended audience, the call to action, or the goal that the sequence is driving towards. Notes help you track general sequence information and make it easier to transition responsibilities when staff changes take place. You can add multiple notes objects to a sequence canvas.