

Set goals and re-entry criteria

With Zoho Marketing Automation, you can set goals for your contacts to achieve and define re-entry criteria to ensure they can re-enter the journey. In the following paragraphs, each action is explained in detail.

Set goals for contacts to achieve

Create a goal criteria your contacts must meet while in the journey. Once your contacts achieve the goal, they will exit the journey and stop doing any further actions. You can then decide what to do with those contacts who haven't achieved the goal.

To set goals for a journey

1. From the *navigation* toolbar, select **Journeys**, click **View Journeys**, and select the journey for which you want to set goal criteria.

🗟 Marketing Automa	tion	Search by name, email, and phone				¢ (1
Bashboard		Journeys				Create
් Contacts	>	JOURNEYSLISTING				
🔆 Lead Generation	>	40 Journeys created	The All Folders V	All ~	Q I am searching for journey	
ය. Journeys	~	JOURNEY NAME	STATUS	CONTACTS ENTERED	CONTACTS EXITED	
View Journeys	>	Zylker list Created on Feb 20, 2023 at 04:43 PM by Lal2021 Lal	Active	2,043	0	:
	> >	Created on Feb 20, 2023 at 04:07 PM by Lal2021 Lal	Draft 20	0	0	:
💾 Library	>	Trial list Created on Jan 31, 2023 at 11:43 AM by Lal2021 Lal	Draft 20	0	0	:
		California event list Created on Jan 30, 2023 at 05:14 PM by Lal2021 Lal	🖲 Draft 20	0	0	
		Boston deal Created on Jan 24, 2023 at 05:23 PM by Lal2021 Lal:	🖲 Draft 20	0	0	:

2. Click the **Settings** icon on the top-right corner, above the journey builder.

Lynter not			
JOURNEY REPORTS CONTACTS			
			☐ Entire duration Feb 20, 2023 to Feb 20, 2023
ENTERED (i)	EXITED (i)	RE-ENTERED (i)	GOAL ACHIEVED ①
2.043	100	0	0
X-RAY			
X-RAY Most engaged Action component	FORM SUBMISSION	ADDED TO LIST	
X-RAY Most engaged Action component Least engaged Action component	FORM SUBMISSION When a contact submits any form	ADDED TO LIST Trigger to existing an added to list test	d new contacts
X-RAY Most engaged Action component Least engaged Action component Most engaged path	FORM SUBMISSION When a contact submits any form -2 1800 - 0 &	ADDED TO LIST Trigger to existing an added to list test -) 643 (> 100	dnew contacts
X-RAY Most engaged Action component Least engaged path Least engaged path Least engaged path Least engaged path	FORM SUBMISSION When a contact submits any form	ADDED TO LIST Trigger to existing an added to list test -] 643 - 100	d new contacts
X-RAY Most engaged Action component Least engaged path Least engaged path	FORM SUBMISSION When a contact submits any form 1800 \bigcirc 0 $_{3}$	ADDED TO LIST Trigger to existing an added to list test -] 643 [+] 100	d new contacts
X-RAY Most engaged Action component Least engaged path Least engaged path TRACE CONTACT PATH	FORM SUBMISSION When a contact submits any form 1800	ADDED TO LIST Trigger to existing an added to list test - 643 • 100 N TAG Int ge Email Opened to the contact.	d new contacts

3. Under Define journey goal, enable the toggle to set a goal criteria and enter a criteria your contacts must satisfy.

JOURNEY REPORTS CON	ITACTS	 Define journey goal Configure your goal and the contact will exit the journey when the goal is achieved. 	
		Criteria* Modifier* Value*	
ENTERED (i)	EXITED (i)	Country V is V canada X V +	
2,043	0		
X-RAY			
Most engaged Action component	FORM SUBMISSION		
• Least engaged Action component	When a contact submits any form	When contacts don't meet the trigger criteria after entering	
 Most engaged path 		Do not remove from journey Remove them from this journey	
Least engaged path			
		✓ Re-entry criteria	
TRACE CONTACT PATH		••• • • • • •	

- 4. Under Contacts not meeting trigger criteria after entry, choose either to remove or not to remove those contacts who don't meet your journey's criteria.
- 5. Click Save.

Set re-entry criteria for contacts to re-enter a journey

By default, contacts enter a journey for the first time when certain trigger conditions are met. With this option, you can allow contacts to re-enter a journey whenever they meet the trigger conditions.

Use case scenario

Use this feature to enable contacts to re-enter your journey so you can send reminder emails for monthly renewals.

To set re-entry criteria

1. From the *navigation* toolbar, select **Journeys**, click **View Journeys**, and then select the journey for which you want to set re-entry criteria.

🗟 Marketing Automa	tion	Search by name, email, and phone				\$\$ 4 <mark>2</mark> 🕠
B Dashboard						Create
් Contacts	>	JOURNEYSLISTING				
🔆 Lead Generation	>	40 Journeys created	🗇 All Folders 🗸 🗸	All	Q I am searching for journey	
品 Journeys	~	JOURNEY NAME	STATUS	CONTACTS ENTERED	CONTACTS EXITED	
View Journeys	>	Zylker list Created on Feb 20, 2023 at 04:43 PM by Lal2021 Lal	Active	2,043	0	:
	>	Created on Feb 20, 2023 at 04:07 PM by Lal2021 Lal	🗐 Draft 20	0	0	*
💾 Library	>	trial list Created on Jan 31, 2023 at 11:43 AM by Lal2021 Lal	Draft 20	0	0	:
		California event list Created on Jan 30, 2023 at 05:14 PM by Lal2021 Lal	🖲 Draft 20	0	0	:
		Boston deal Created on Jan 24, 2023 at 05:23 PM by Lal2021 Lal:	Draft 20	0	0	:

2. Click the **Settings** icon on the top-right corner, above the journey builder.

Zylker list				Edit Pause Q
JOURNEY REPORTS CON	NTACTS			
				Entire duration Feb 20, 2023 to Feb 20, 2023
entered (i) 2,043		exited () 100	RE-ENTERED ① O	GOAL ACHIEVED ① O
	•••••			=
X-RAY				■ •
X-RAY Most engaged Action component		FORM SUBMISSION	ADDED TO LIST	
X-RAY Most engaged Action component Least engaged Action component		FORM SUBMISSION When a contact submits any form	ADDED TO LIST Trigger to existing and added to list test	new contacts
 X-RAY Most engaged Action component Least engaged Action component Most engaged path 		FORM SUBMISSION When a contact submits any form	ADDED TO LIST Trigger to existing and added to list test -2 643 -3 -100	new contacts
 X-RAY Most engaged Action component Least engaged path Least engaged path 		FORM SUBMISSION When a contact submits any form	ADDED TO LIST Trigger to existing and added to list test -1 643 + 100	new contacts
 X-RAY Most engaged Action component Least engaged path Least engaged path 		FORM SUBMISSION When a contact submits any form 	ADDED TO LIST Trigger to existing and added to list test -☐ 643 → 100	new contacts
 X-RAY Most engaged Action component Least engaged path Least engaged path 		FORM SUBMISSION When a contact submits any form 	ADDED TO LIST Trigger to existing and added to list test 	new contacts
 X-RAY Most engaged Action component Least engaged path Least engaged path TRACE CONTACT PATH 		FORM SUBMISSION When a contact submits any form 	ADDED TO LIST Trigger to existing and added to list test 	new contacts
X-RAY Most engaged Action component Least engaged Action component Most engaged path Least engaged path TRACE CONTACT PATH Enter a context engal address		FORM SUBMISSION When a contact submits any form 	ADDED TO LIST Trigger to existing and added to list test -2 643 > 100 NTAG tag Email Opened to the contact. -2 2043	new contacts

3. Under **Re-entry criteri**a, enable the toggle to allow contacts to re-enter the journey whenever they meet trigger conditions.

		> Define journey goal		
		> Contacts not meeting trigger criteria after entry		
ENTERED (i)	EXITED (i)			
2,043	100	 Re-entry criteria 		
		Allow re-entry of contacts		
		Allow re-entry of contacts when they achieve the following trigger criteria:		
		Form Submitted (i)		
X-RAY		Added to List (i)		
Most engaged Action component	FORM SUBMISSION			
Least engaged Action component	When a contact submits any form			
 Most engaged path 	→ 1800 → 0 &			
Least engaged path		Save Cancel		
	ASS			

4. Click Save.

Note: Contact re-entry isn't allowed for email triggers and contact score triggers.