



Automation Checklist

Once you've gotten a handle on Adestra automation through the Adestra Advanced Training session, this checklist is designed to be a guidepost for all the steps you need to do each time you create an automation in the platform. Since you've been shown the Adestra automation process from A to Z, you just need this quick checklist to reference and keep you on track with all of the step along the way.



Define the goal of your automation sequence.

Sketch out your logic and sequence.

Make a checklist of what you'll need. Typically you'll need: email campaigns, filters for branching, dynamic list and filter for input into the program.

Create a project folder for all campaigns in the automation sequence for each reporting later.

Remember you need to add a test list to your campaign to publish the campaign. If you need to go back and make an edit, you'll need to publish the campaign again.

Create your input data for the automation. You will typically use a dynamic list with a filter for this step.

Do not hit update on your dynamic list. Instead schedule your dynamic list to run at a certain time everyday. (This is what schedules the first email in your sequence to go out.)

Create your automation program and start staging your campaigns and branches.

Save your draft along the way.

Once you place your campaigns and branches and filters in your automation, publish the program.

Once you publish the program, go to your input data dynamic list and associate the list to your program.

The final step is to go back to your automation sequence and click Activate located in the top right of the workspace.