Unite Education Program v6.5
Job Aid: 5593

Add a Customer Journey to Unite

In Unite, a customer journey defines the process that merges communications, actions, and segments together and automates the communications and actions to a targeted audience. All customer journeys begin with a segment. You can have multiple segments, communications, and conditions in a customer journey. Segments and emails must be active and live in order to use in customer journeys.

Add the customer journey

1. Open a browser and log on to Unite.

2. On the main menu, click JOURNEYS.

3. On the navigation pane, click **Customer journeys**.

4. On the command bar, click ⊞ **New** .

5. If you want to start with a template, click the template and then click **Select** . Otherwise, click **Skip** .

Note

   You can start with a system template, or a custom template added by a Unite user from your school.

6. Click the *General* tab.

7. In the **Name** text box, enter a unique name for the customer journey.

> **Note**
>
> If you are running multiple instances of Unite, there is a school code for a JD instance and a school code for an LLM instance. Make sure you designate the correct code so that Unite sends emails to the people in the correct instance.

8. In the **Target** text box, verify **Contact** is selected.

9. In the **Start date and time** box, select the date and time of the first day you want the customer journey to go into effect.

10. In the **End date and time** box, select the date and time of the last day you want the customer journey to be in effect.

11. Verify or change the **Time zone** for the journey.

12. In the **Content Settings** list box, enter your **School ID**.

13. Click 🖫 **Save** .

14. Design the customer journey.

Related resources

*   5711 – Set the Publish Status for an Active Customer Journey