

How to create a plan that results in a Contactsend filter

Scope

In this tutorial, you will learn what a plan is, how to create one using the Contactplan UI, and how to use it to generate a filter directly in Contactsend.

What is a plan?

A plan defines how and when to carry out a specific activity, using a selected segment. For example, you can create a plan that includes all the information required to send a marketing campaign, which is scheduled to take place on a particular date and at the appropriate time.

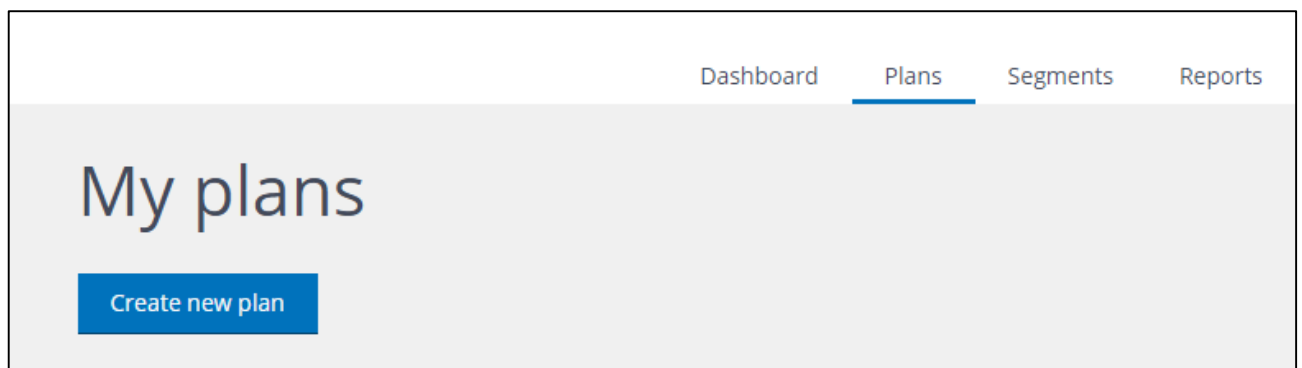
But in this tutorial, you'll use the plan that you create to generate a filter in Contactsend.

See https://explore.contactlab.com/en/products/Contactplan/main_guide/CreatingNewPlans/ for more about creating plans, and the 'How to create a segment' tutorial for a brief introduction to segments.

Click the **Plans** tab in the Contactplan UI to manage existing plans, or create new ones.

How to create a new plan

- 1) Click the **Plans** tab if it is not already selected, then click **Create new plan**.



Dashboard Plans Segments Reports

New plan

Insert plan name

When

One shot Repeated

Day & hour Timezone

2017-03-08 13:43 UTC +1

Who

Segment

Select Segment 0

DND policy

2 mail per day and 10 per month 0

total contacts: 0

Advanced options

Action

Consumer

Back to plans list Save As Draft Save

2) On the **New plan** page, give the plan a recognizable name.

Dashboard Plans Segments Reports

New plan

Insert plan name

Campaign Q1 2017 A

3) Under **When**, decide whether the plan should be run just once, or if it should be recurring. Click:

One shot for a plan that takes place once.

Repeated for a recurring activity.

Note:

The examples in this tutorial assume that you have selected **one shot**, and have not changed the default date and time. This will ensure that the plan is run as soon as it is saved.

The screenshot shows the 'When' configuration section. At the top, there are two tabs: 'One shot' (which is selected and underlined) and 'Repeated'. Below the tabs, there are two input fields. The first is labeled 'Day & hour' and contains the text '2017-03-08 13:43'. The second is labeled 'Timezone' and contains the text 'UTC +1'. A dashed horizontal line is visible below the input fields.

See the *'How to create a plan that makes an email delivery through Contactsend'* tutorial for more about **One shot** and **Repeated** plans.

- 4) Under **Who**, select the **Segment** that is to be used to generate the Contactsend filter, from the drop-down list.

Under **DND policy**, you can also select one of the available Do Not Disturb policies, if required. This enables you to automatically limit the number of communications that a contact can receive, within a defined time period.

See https://explore.contactlab.com/en/products/Contactplan/main_guide/ManagingDND/ for more about DND policies.

In the example below, a DND policy has been selected that allows the relevant contacts to receive a maximum of two emails each day, and up to ten per month.

The screenshot shows the 'Who' configuration section. It features a 'Segment' dropdown menu with the selected option 'US M users interested in bags'. Below it is a 'DND policy' dropdown menu with the selected option '2 mail per day and 10 per month'. To the right of these dropdowns, the text 'total contacts:' is visible. Underneath, there is an 'Advanced options' section with an upward-pointing arrow. This section contains a 'List generation' area with a 'Generate list' field set to '-1' and the text 'now' next to it, with a note '(Set -1 to generate list when saving)'. At the bottom of the 'Advanced options' section is the 'Set contacts number' area, which has three radio button options: 'All' (which is selected), 'Exact', and 'Range'.

5) The **Advanced options** enable you to:

Determine, under **List generation**, when the contact list that will be used for the activity, is to be generated.

Choose, under **Set contacts number**, how many of the contacts in the list are to be used for the activity.

Note:

The examples in this tutorial assume that you have not used the **Advanced options**, and so the default will be applied, to generate the list as soon as the plan is saved.

See the *'How to create a plan that makes an email delivery through Contactsend'* tutorial for more about **Advanced options**.

6) Under **Action**, select **Clab Filter Creator** from the **Consumer** drop-down list.

This enables you to create a filter for use in Contactsend.



Depending upon your system settings, the other options may include:

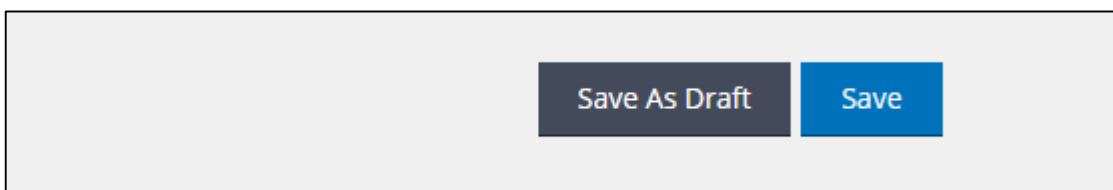
Clab Campaign Creator

Enables you to create an email campaign for the plan, which will then be sent using Contactsend.

Consumer SFTP plugin

Defines the storage location to which the contact list associated with the plan is exported.

7) Click **Save**, positioned at the foot of the page, to activate your plan as you have defined, or click **Save As Draft**, to store your plan for later editing.

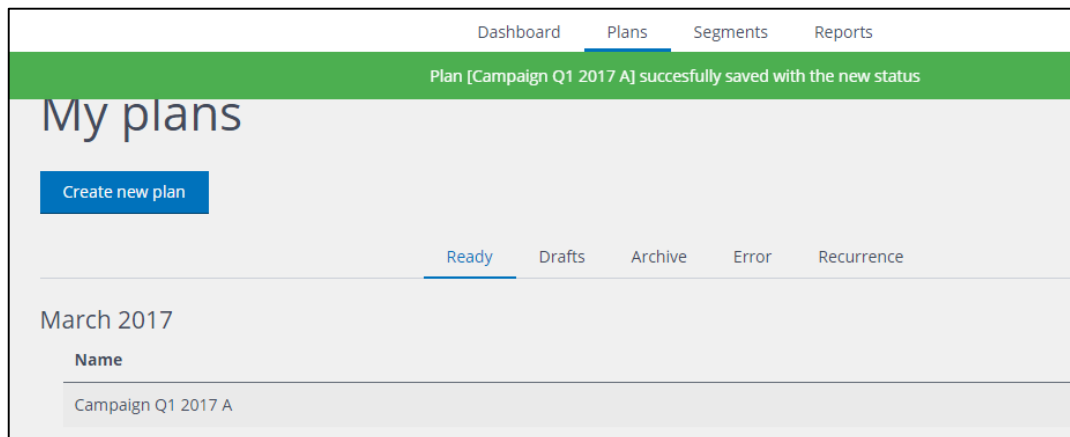


Note:

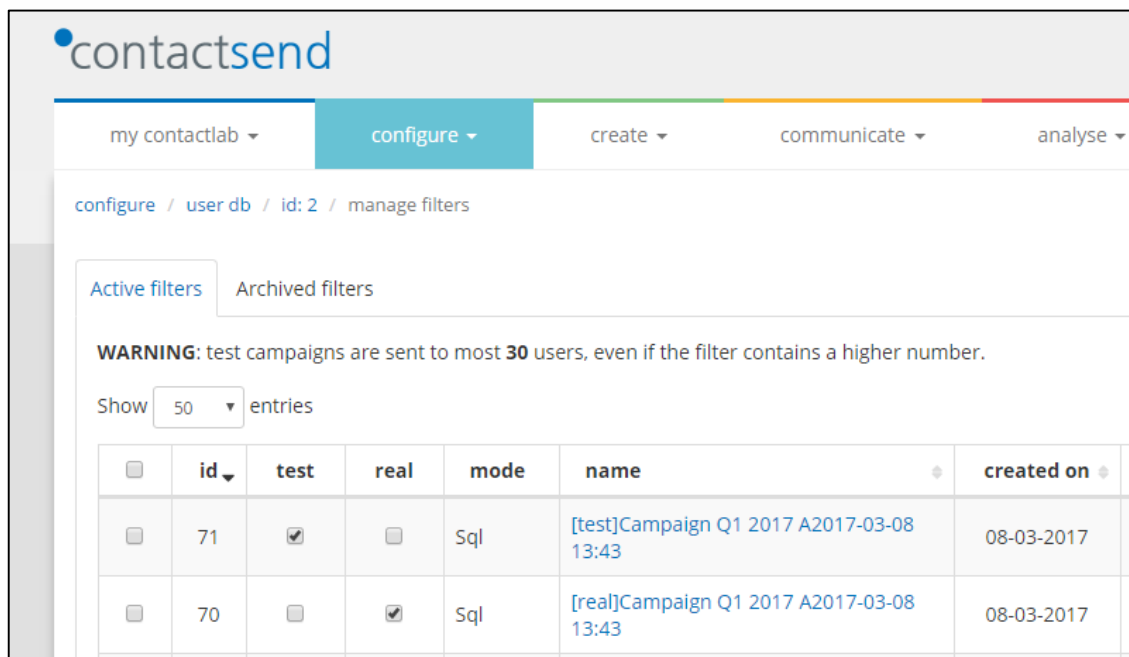
If you don't click **Save** or **Save As Draft** and you navigate away from the **New plan** page, the plan

that you have created will be lost.

When you save your plan, it is included in the list on the **My plans** page.



- 8) After you have clicked **Save**, log in to Contactsend, navigate to **Configure**, select the appropriate database and click **manage filters**. You will see that two new filters have been created by your plan. Their names include the plan name that you defined, but each of them has either a **[test]** or a **[real]** prefix.



Note:

Currently Contactplan creates **[test]** filters that are empty. The **[real]** filters are, however, populated with contacts, and are ready for you to carry out the appropriate activity in Contactsend.