Act! Marketing Automation

A Guide to Getting Started

Helping your business grow with marketing automation

Marketing Automation

Contents

"Marketing Automation replaces separate systems for email, web visitor tracking, lead scoring, nurture campaigns, campaign management and reporting with one solution that streamlines marketing processes and shares data with sales."
– David Raab, Raab Guide

Personal List

1. Click Personal List from the column on left side → 2. Then click Actions in the upper right

3. Click new List → 4. A box pops up to Create New List

+ Add List name
+ Add Lead Source
+ Click Save

5. Personal List Page

- To upload a list click Actions on the top right corner
- Click Import *Import list must be in the following format: First Name, Last Name, Email address **No special characters supported
- Click Select
- Search your desktop for the XLSX File,
- Select file and click open
- When file upload is completed click Upload
- Click Next Step
- Click Complete Import
- Click Return to List on the top right menu
- Click Actions from the top right menu
- Click Save & Return

Creating Assets

1 Click Assets from the column on left side → 2 Then click Actions in the upper right

3 From the dropdown click New Campaign

4 A “New Asset” box will pop up, add a title for your asset: ex. Getting Started with Emarketing

5 Click Create → 6 A new box will appear, “Add Asset”

- **Asset Name:** Give your asset a name, ex: Getting started with Emarketing
- **Description:** This Document will help you excel on your email marketing goals
- **Select Document Type:** PDF > YouTube > Web
- Click Next

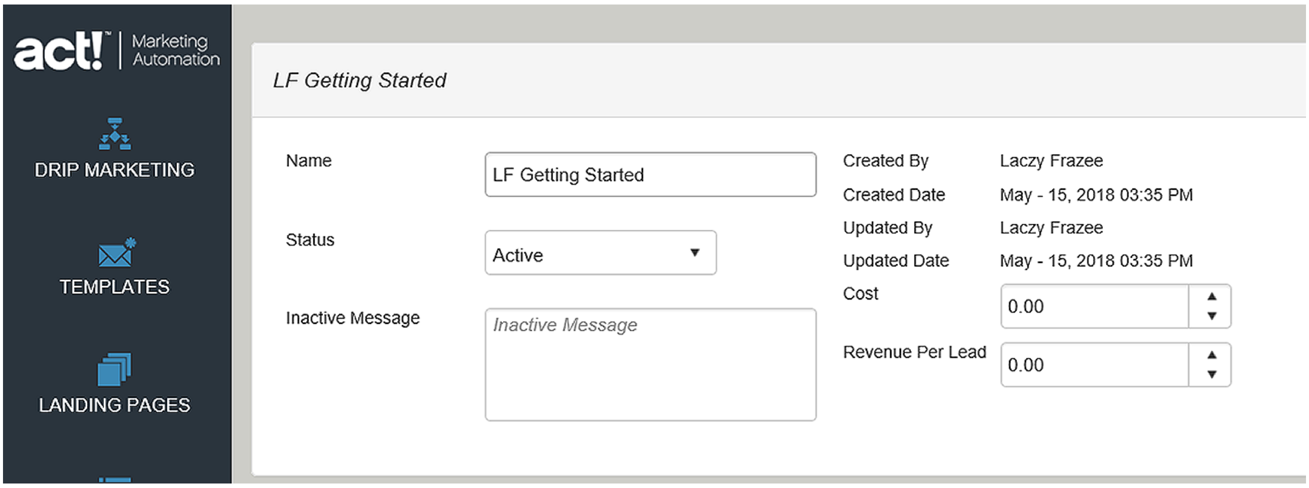
7 Click Assets from the column on left side

1 From the upload screen click Select

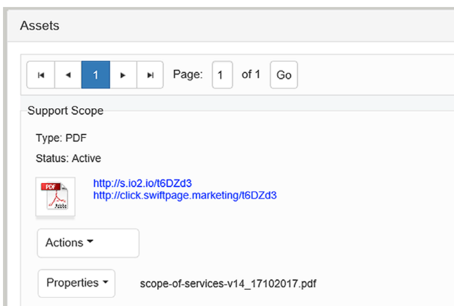
2 Search for document needed, double click document

3 Click Upload

8 Once Asset is uploaded, you will be taken to a Getting Started page, with the Emarketing Asset Overview. On this page you can review the Name, Status, You can add an Inactive Message, View creation details, add a cost and possible Revenue per lead amount



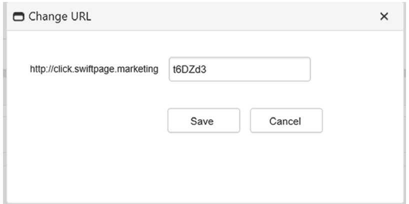
9 If you scroll to the Asset portion you can see the document, and URL for asset →



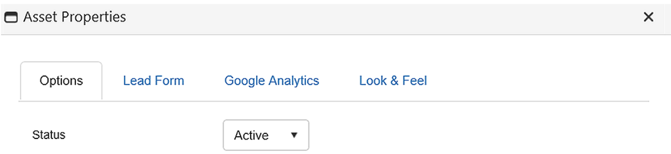
10 You can brand the end of the URL to meet business needs

1
Click Actions > Click Change URL, a popup window will display.

2
Click Save when done



11 There are several Properties you can set within an asset. Start by clicking Properties > Set Properties



- Click Options tab
  - You can edit and add an email address, this email address will receive an email notification every time the form is completed
- Click Lead Form tab: then check the box to show lead form
  - **Form Type:** the type of data needing to be completed to view asset

    Full
    Full contact form will contact multiple pieces of end users data

    Email Only
    Email only will allow only email filed
  - **Trigger On:** The option selected is what determines when the form type filed populates on asset

    Pages
    Select Pages if multiple pages of document

    Time
    Select Time if on web page, video or if one page document.
  - **Allow form cancelation:** if this box is checked viewer can cancel the form type and continue viewing asset without adding information
  - **Pop message for form ex:** Enter your email address to continue reading
  - Click Save
- **Click Google Analytics:** these are provided by Google and can be used accordingly
- **Look & Feel:** Can be used to customize the asset
- Click Save

12 Scroll to top of web page → **13** Click Actions → **14** Click Save and Return

15 You are now ready to use your Asset. Copy URL to use as hyperlink within templates or drip marketing campaigns

Creating/Editing Templates

You must create their template prior to creating a drip marketing campaign (templates can be reused multiple times)

1. Click Templates from the column on left side → 2. Then click Actions in the upper right

3. From the dropdown click New Template

4. A "New Template" box will pop up. It is recommend being very specific about template title creation, this will help to find them later.

Select Type
Marketing: create template with images, video embedding image, buttons and more

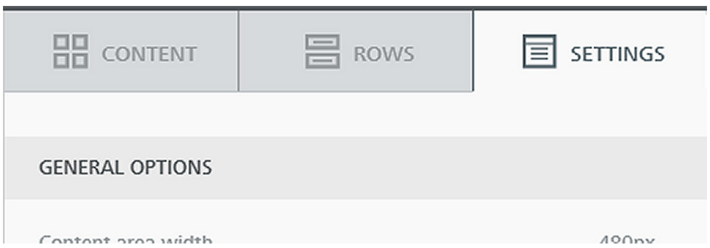
Sales: This will be an email that looks as though it was sent from inbox, standard email

Select Editor
WSIWIG: Create HTML temp

Drag and Drop: predesigned templates for end users to use with drag and drop editor

- **Default Template:** Allows End user to Select a predesigned template
- Click Create

5. A new page will display, this is the Template Editor, and on the right is everything you need to design your template.



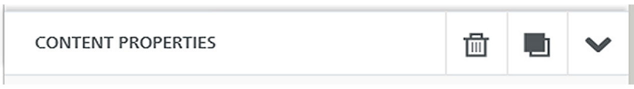
6. A new page will display, this is the Template Editor, and on the right is everything you need to design your template.

- **General Options:** Content area width > Can edit the width of the template when email loads for end user
- **Background color:** Click Background color box, select the color you wish the background to be. This will edit the entire background of the template
- **Content Area background:** This will edit the color of the row for content blocks
- **Default Font:** Edit all the font within the template to be the same
- **Link Color:** Edit all the text links to be same color

7. **Rows Tab:** You can drag and drop new rows above or below boxes in the template

8 **Content Tab:** Once you have the row in place, click on the type of content you would like to use and drag it to the "No content here…" box

Each time you edit the content, there is a Content Properties at the top of each box. The content of this box will vary, but the main actions at the top are the same throughout.

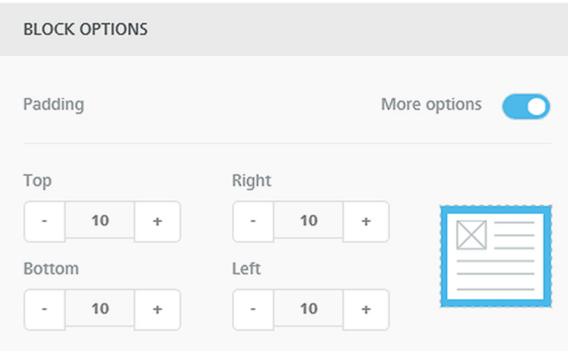


Trash can icon deletes the image

Double square icon will duplicate image block

Down arrow will redirect to Content tab

There is also a Padding Option under the Block Option. This allows you to add padding to sides of photo uniquely



Text: Click within Row, Highlight example text and delete. Once text is deleted you can add message, a text tool bar also appears to help customize the text

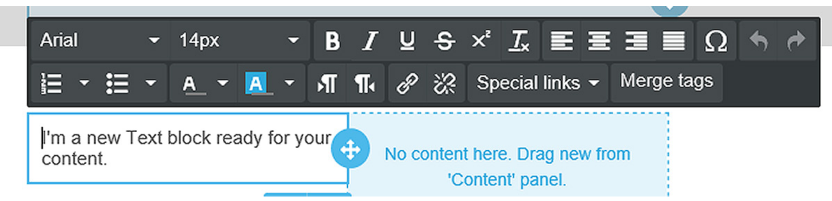
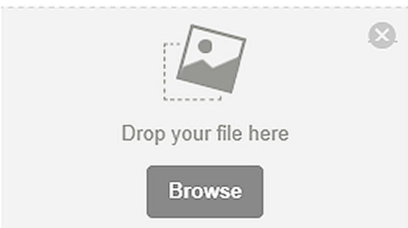


Image: You will be directed to the image library

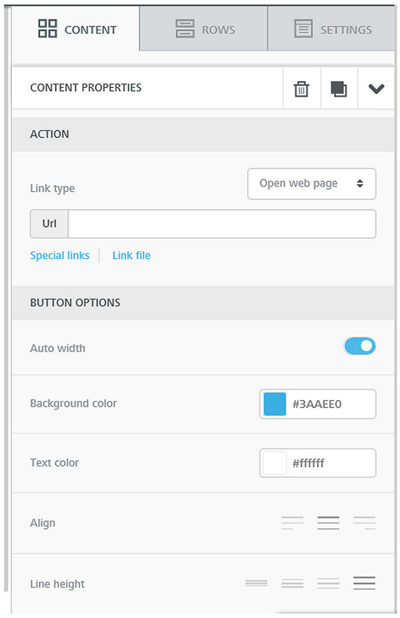


→ If you are planning on importing many photos from a folder you can create a photo folder within the library. Click the folder/ plus sign icon, enter a file title in Folder Name, click the check mark (Image library is shared with all users whom have access)

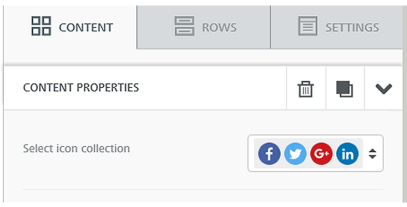
- Click the folder created
- Once in the folder click Upload to add images from your desktop, Import to move images from other locations or search for free photos
- Once import method is selected, you can click one photo or multiples to load
- Click Open once photos are selected
- The images will begin to load
- When the image is added the folder you can click Insert to add the photo to the selected location on the template (can only add one image to the template at a time)

Button: Highlight stock text and replace with desired message: Click Here, RSVP, Sign Up etc.

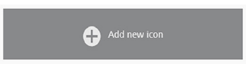
- You'll notice as you select Button, the Content Properties on the right change to set and customize the button you've added.

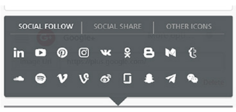


- **Divider:** Allows you to create a bar to show a divide content
- **Social:** You can add links to all your social media accounts, and customize the look of the logos



You can additional logos by selecting the Add new Icon button





- **HTML:** Adds block space for HTML
- **Video:** Ability to add a video URL
  - Click YouTube to search YouTube for video link needed Click Vimeo for video link needed
  - Copy and paste link URL into Video URL bar
  - The Video thumb nail from video source will load on to template, when end user clicks on the thumb-nail they will redirect to YouTube or Vimeo
  - **Play Icon Type:** Change the style of the Play button
  - **Play Icon Color:** edit the color of the Icon to be more distinctive on the image
  - **Play Icon size:** Edit the size of the play icon

9. Save template by clicking the blue SAVE button on the right side
10. You can send a test email
    - Click on Actions from the top right
    - Then click Send Test, and enter your email address
11. When done editing click Actions from the top right and then click Return

Landing Page

Two layouts: Landing Page and Lead Capture

Landing Page: Ask Kristin for additional insight on how to create landing page from Template. Add later

Lead Capture: Lead Capture allows you to embed code to capture contact data via a form already created on website

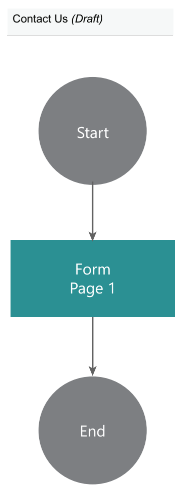
Example: Web Development creates a site www.act.com/contactus
On the site there are spaces for end user to enter contact information, but the form does not actually capture data. By embedding the landing page within the code of the website it will push data filled out on the form to Act! Marketing Automation as a lead

Creating a Landing Page

1. Click Landing Pages from the column on left side →
2. Then click Actions in the upper right
3. From the dropdown click New Page →
4. On Create New Page enter the following

- **Page Name:** Ex: Contact Us (this title will show up in the web browser tab of internet browser)
- **Smart Tag** (internal key search words)
- **Page Type:** type of layout Web Developer uses (HTML…)
- **Redirect link:** From example above www.act.com/contactus
- **Notifications:** Add the email address of team members that need notification the form is fulfilled
- **List name:** Contact completing the from can be added to a list (you can create a new list under Personal List or add contact to existing list) if the list is in drip campaign the contact will begin receiving notifications
- **Auto Response:** You can add a previously designed Marketing template to this stage (pre create a Thank You template)
- **Lead or Contact:** How the contact is pushed to Act!
- **Assign Lead/ Contact To:** assign to an Act! user

5. Click Create →
6. You will then see a Draft menu →



- Click Form Page 1 (Center Box)
- Click Edit Form
- Click Go

→ On the Pages tab click Actions in the right hand corner

→ Click Add Control, you can select how data is added to the form Checkbox, Checkbox List, Comment Box, Dropdown, Hidden, Label, Single Text block

- Single Text block selected > click Add Control
- Enter the first question that is listed on webpage www.act.com/contact us (first name)
- Add Default value: First Name
- Check box If value is required
- Change settings for width and height if needed
- Map field to field within Database (ex: below)
  Contact in first drop down> Customfields/key contact
- Click Actions form the top right
- Click Save & Return

- Repeat i-x for additional question fields needed for form
- When finished click Actions
- Click Save & Return
- When Form is finished click Actions
- Click Generate HTML Script
- Provide HTML to Web Developer to add to site

Creating a Drip Marketing Campaign

Sending single Email

1. Click Drip Marketing from the column on left side → 2. Then click Actions in the upper right

3. From the dropdown click New Campaign, and fill out Create campaign form

- **Enter Campaign Name** *recommending that campaign name be very unique as all drip campaigns sent are combined
- **Add Smart Tags if desired:** Smart Tags will allow you to quickly search your campaigns for specific key words similar to hashtags : Promo, Sales, etc.
- **Campaign Templates:** select the number of email stages you would like to begin your campaign, you can add more as needed later as well
- **List Name:** Select the list of contacts that you would like to send to from the drop down menu

  Personal List
  List of contacts you personally have uploaded under your user id

  Team Personal List
  List of contacts other team members have uploaded

  Group List
  List from database

  Click Add List
  1. Create New List window will load
  2. Add a list name: “Britt’s contacts”
  3. Add Source: how it was uploaded

- **List Compare Options:** If you choose to automatically compare a list, it will retrieve the list based on the frequency chosen. New members will be added to the top of the campaign. If members have been removed from the list, then those members will be stopped in this campaign.
- **From Name:** email address used to send from
- **Default From Name:** will auto fill with current logged in user but can be edited
- **Default From email address:** defaults to logged in user but can be edited to different address
- Click Create from the top right corner

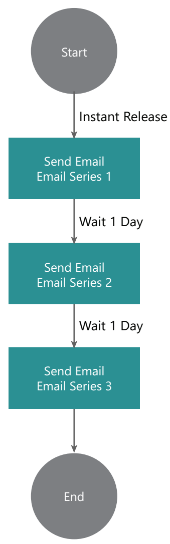
4. Drip Campaign window loads

- Click the Instant Release under the Start option, This is where you can change the email to send on a different date and time instead of sending immediately- does not give me the option to click
- To add your email template to the drip marketing process click the first box titled: Send Email, Email Series 1

  → Edit Email Step window will appear, in drop down box select Edit Email Content

  → Click Go

  > The Email Series 1 window will appear with the template editor to create a template, you can create a new template from here (follow document on how to create template) OR you can upload a previously designed template



- The Email Series 1 window will appear with the template editor to create a template, you can create a new template from here (follow document on how to create template) OR you can upload a previously designed template

  1. To upload a previously designed template click Actions from the top right menu
  2. Click Import My Templates
  3. Click the Select Template Drop down menu, selected the template needed
  4. Click Import

- Once the imported template loads, review the content and ensure you have added the Unsubscribe details within the template (see document how to create template)

- Click Actions from the top right

- To add subject line Click Properties

  + Add a template title (can be the same title the template was created with)
  + Add subject line
  + Can add a Pre-Header if desired

- Click Update

- Click Save from the top right

- If all edits are complete click Actions

- Click Return

→ **Add a decision stage** (Opened Yes/No)

- Click on the stage template just added

  1. Window “Edit Email Step” will appear
  2. Change drop down to Insert Action After
  3. Selection Action Drop down: Select Decision

- Click Go

- Select from the Add Condition window the criteria action for your email (email opened, email clicked…)

- Click Return

- You will now see a decision stage with a Yes & No avenue

  1. On the Yes side of the decision tree click the Click The End stage
  2. Edit The stage from Remove End to Change Action Type
  3. Select the Actions Drop down, select Email to send new stage of email campaign based on previous email decision

- Click Go, you will now see an email stage has been added under yes

- Repeated I-L on the No side

- **Adding an email to new Email Stage** (repeated the following steps for both sides of your decision tree)

  - To add your email template to the drip marketing process click the stage

    ✓ Email Campaign (new Email Series) will load

    1. Click Actions from the top right
    2. Click Switch to Drag & Drop
    3. From Switch to Drag & Drop window select My Templates in the first drop down
    4. Select the template title needed in the second drop down

- ✓ Click Switch
- ✓ Once the imported template loads, review the content and ensure you have added the Unsubscribe details within the template (see document how to create template)
- ✓ Click Actions from the top right
  - + To add subject line Click Properties
  - + Add a template title (can be the same title the template was created with)
  - + Add subject line
  - + Can add a Pre-Header if desired
- ✓ Click Update
- ✓ Click Save from the top right
- ✓ If all edits are complete click Actions
- ✓ Click Return

> **Ending campaign**

>> If decisions have been added to the campaign, the steps below will need to be added to each

1 Click on the last camping stage needed

2 From the Edit Email step pop up select: Change Action Type in first drop down to Insert Action After

3 From Select Action drop down select: End

> **Sending campaign**

>> Click Actions from the top right

>> Click Activate

- ✓ Active Campaign window will load, review all campaign stages

✓ If you have a green check mark on campaign stage the campaign is clear to send

✗ If you have a red x on the campaign stage you will need to make an edit prior to sending, you will be given details as to why the campaign not passing

- ✓ Click Activate Campaign

>> An email notice will be sent after the campaign has sent

Questions about Act! Marketing Automation?

Please contact:

Brittany Roberts
brittany.roberts@swiftpage.com
480-304-4437

act!™ | Marketing Automation

Join over six million users in 100+ countries to create your adaptable, everywhere, and connected workspace today.

About Act!

Act! makes it easy to build relationships that last with quick, organized access to highly personalized customer details. Because every business runs differently, you have the freedom to tailor an Act! experience to your business and industry needs—your adaptable, everywhere, connected workspace. Finally, a CRM solution that's uniquely yours.

Call **866-873-2006**
Visit **act.com**

621 17th Street, Suite 500 | Denver, CO 80293 | (866) 873-2006 | act.com