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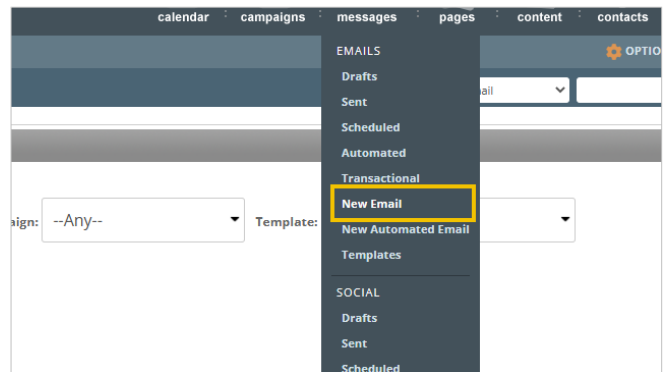
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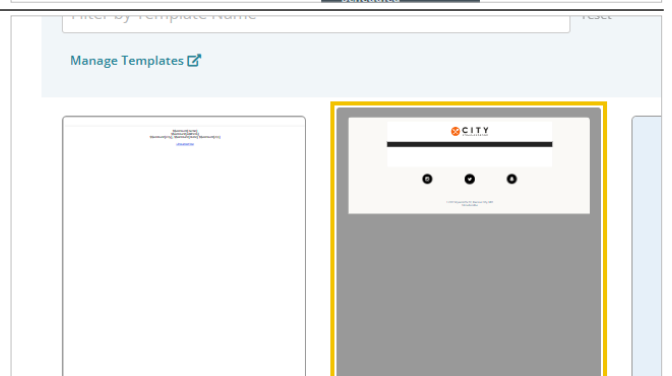
1. Email

1.1. Compose an Email

To create a new manual email, which can either be sent now or scheduled to be sent on a date and time in the future, click **New Email**

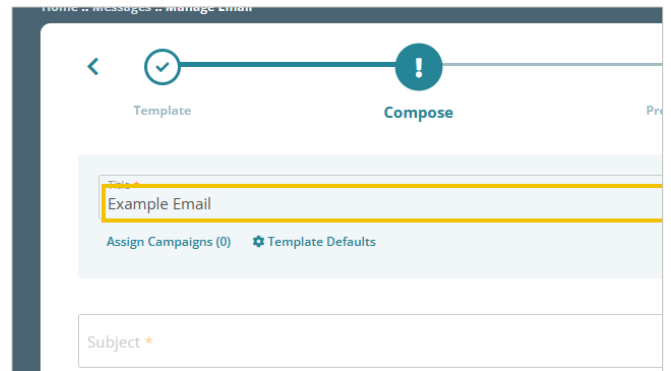


The first step of the compose process is to choose the email template you wish to use. The template provides the branded structure to your email. If you have the email coder permission, you may also choose the Paste in Code option to begin without a template

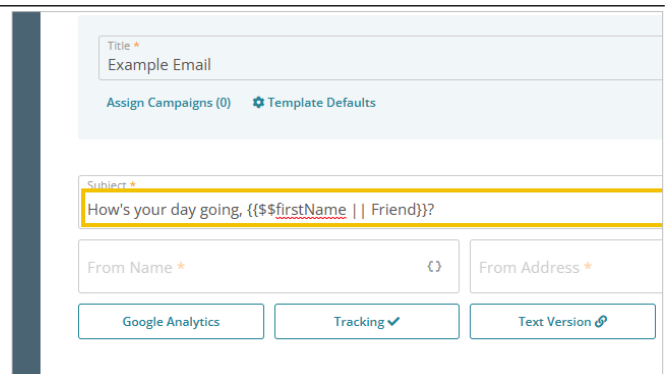


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Provide an internal Title for your email. Your recipients won't see this title, but it will allow you to locate the email in the future

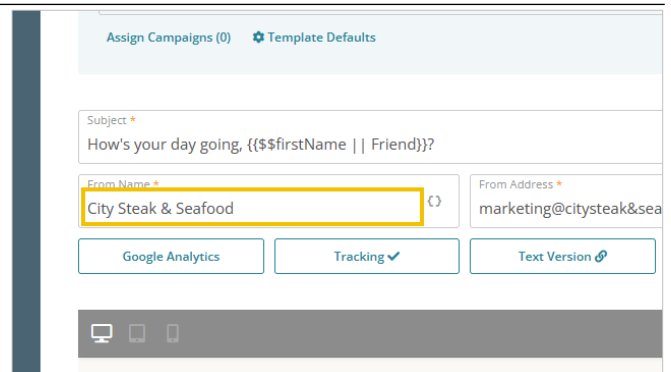


Provide a **Subject** for your email. Subjects can include the use of emojis and also variable content (the variable picker is shown within the Subject line). If you do use variable content, we suggest using a fallback for any contacts who do not have data saved in that field



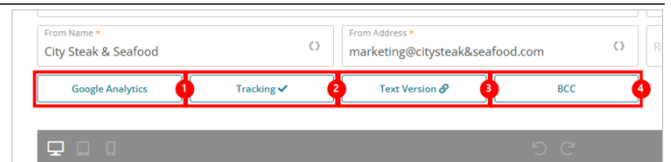
Type in the **From Name** and **From Address** you will be using which your recipients will see. Only domains authenticated within emfluence can be used in the from address field.

Optionally, you may choose to type in any information you would like to show up in the preview pane of a cellphone or inbox inside the **Preheader** field.



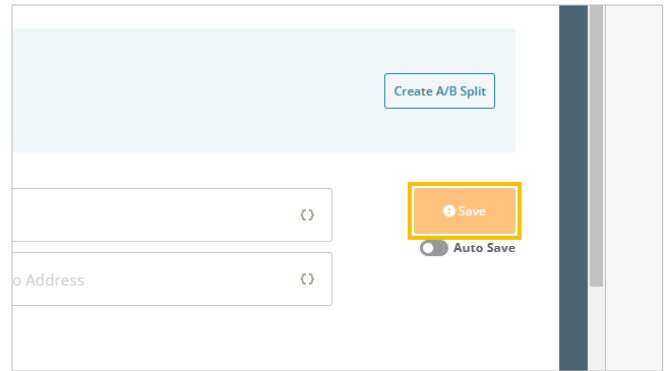
Below the inputs, you can choose to add, edit, or change:

1. **Google Analytics:** Turn on and adjust the settings for Google Analytics on this email.
2. **Tracking:** Turn off View and/or Link Tracking on your email.
3. **Text Version:** View and Edit the Text Version of your email.
4. **BCC:** Add a single BCC address which will receive a copy of every individual's email. This is usually done only for compliance purposes for an address set up to handle the large volume it will receive.

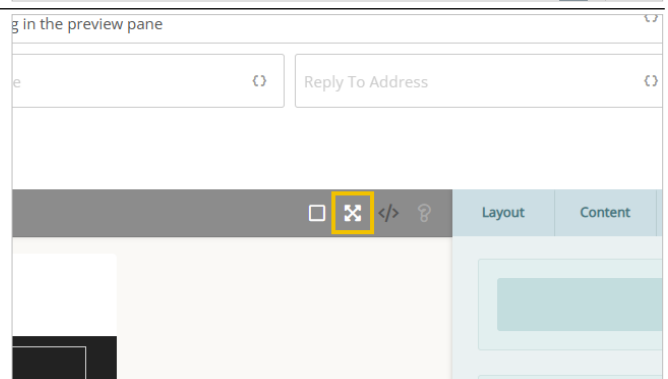


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Click **Save** to save the information you have entered. You may also choose to turn Auto Save on if you wish

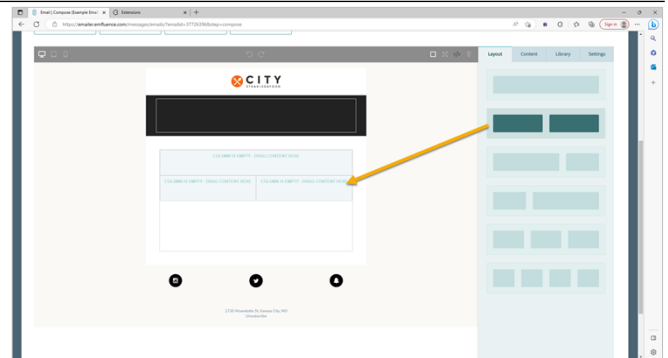


Now that the top information has been saved, we don't need for those fields to continue taking up space on the screen. Click on **Fullscreen** (the large X) to expand the compose window



Now you can drag **Layouts**, **Content Elements**, and saved **Library Items** into any of the editable areas in your email (those not locked down by your template).

Layouts provide a frame if you need to move between one or more columns. Layouts do not have to be used if all of your content elements can fit into the template in the existing structure.



Content Elements can be dragged from the menu and dropped into your template. They can go inside or outside of Layouts.

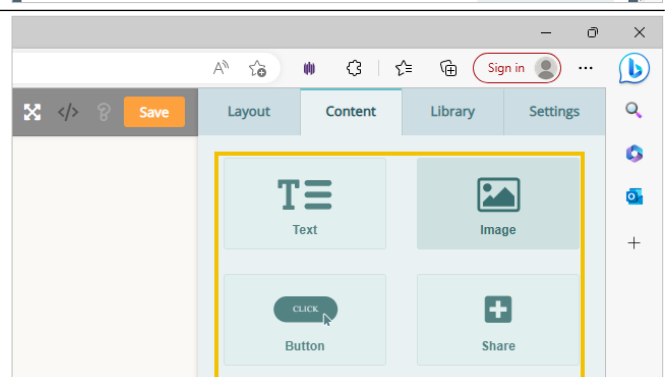
Text elements are for text which can be formatted through the editor.

Image elements are for images. While you can put an image inside a text element, we suggest using Image elements for your images as they will be preset not to break outside the confines of your template.

Buttons can be used for calls to action. For emfluence links, remember to use the dropdowns in the selection tool.

Dividers (space which includes a break line) and **Spacers** (open space without a break line) can be used to insert some horizontal space within your email.

Social Links can be used to add quick social links to your email. You can choose the number and order to include and the how they will display.



Conditional Content allows you to create sections in your email and logic to show or hide sections of your email to recipients based on your query.

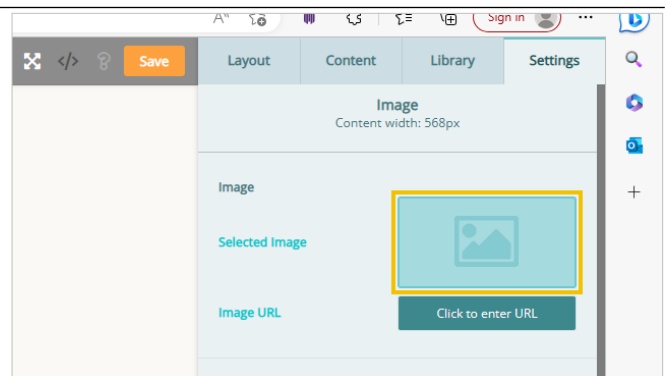
Embedded Video allows you to link directly to a mp4 video which can play in the email for inboxes that support this functionality along with providing a fallback for those that do not.

Nifty Images allows you to insert either a countdown timer or a Pinterest feed into your email.

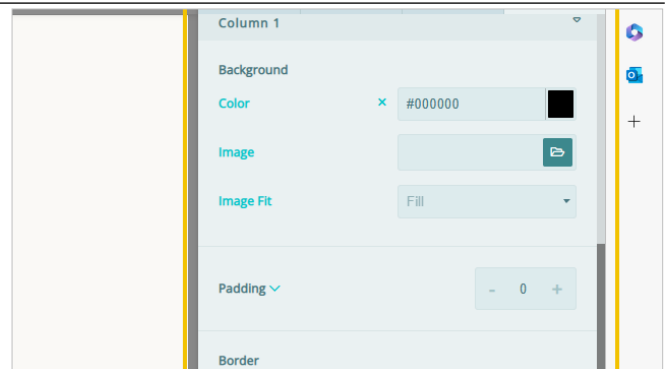
Share adds a share button to your email.

Custom HTML allows you to paste HTML directly into the email. NOTE: Some code may not be allowed.

When clicked into an element, different options will be visible under the **Settings** section. For Images you can select an image from your Uploaded Files, set Alt Text, add a link, and edit padding and border options

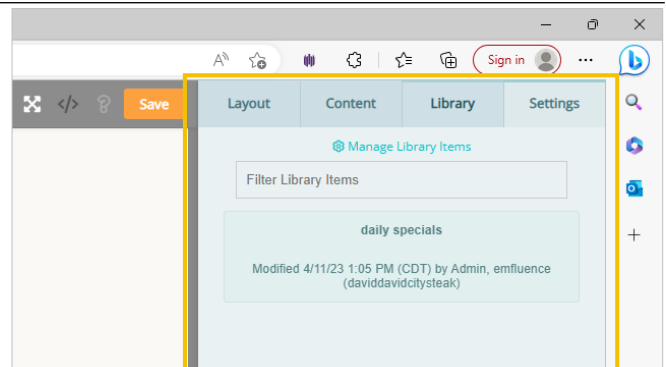


Settings on Layouts can be used to format a background color (or format the columns to different colors), change the order in which columns stack, and set border and padding settings

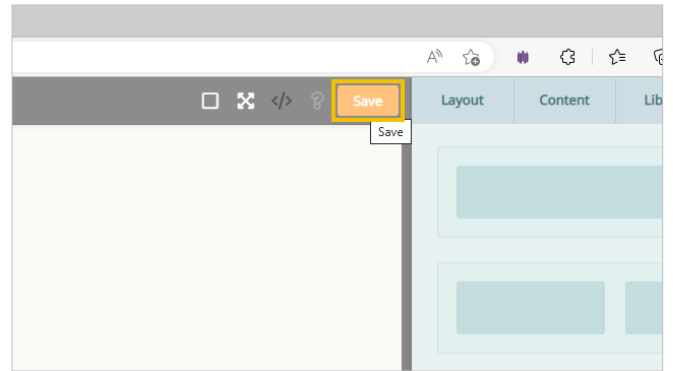


Library Items are pre-used content which has been saved for later use. These can be simple items such as a formatted button or more complex such as everything with a Layout including Images, Text, Buttons, Spacers, and more.

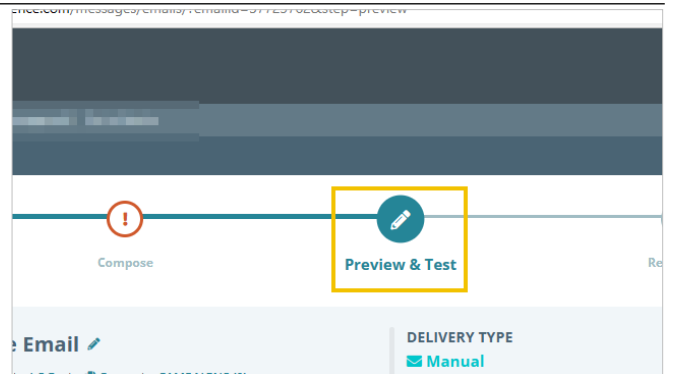
As with Layouts and Content Elements, Library Items can be dragged from the menu and dropped into your email



When your email editing is finished, click on **Save** and then click the **Fullscreen** icon to exit the fullscreen mode

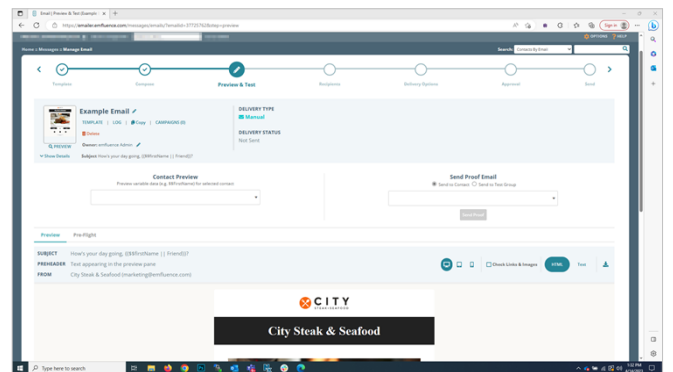


With your email complete, you can move forward to the **Preview & Test** step to test your email, the **Recipients** step to assign groups to receive your email, the **Delivery Options** step to schedule your email, the **Approval** step to request approval (only necessary if your account uses one or more Approvers), and finally the **Send** step to send your email.

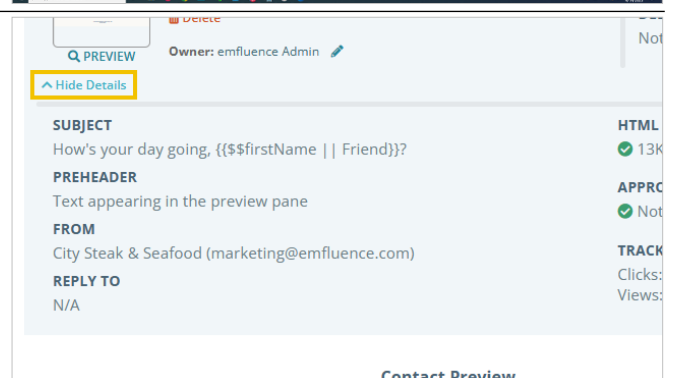


1.2. Preview & Test an Email

The Preview step allows you to check over your email before assigning recipients and scheduling it for delivery

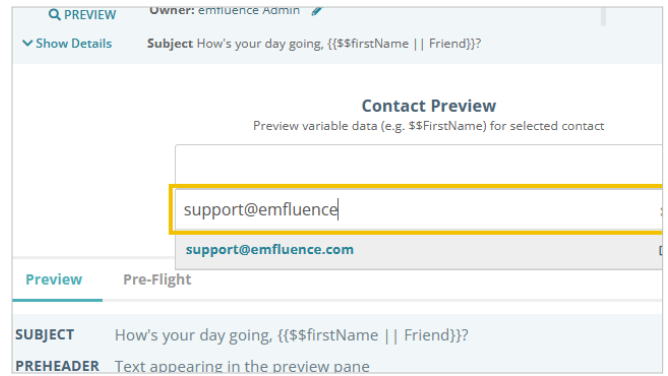


At the top of the page you can click **Show Details** and **Hide Details** to expand and collapse the details about your email which will include subject, preheader, from, reply, HTML size, approval status, tracking, and recipients assigned. As you continue to move forward on your email, completing more steps, more information will get filled in.

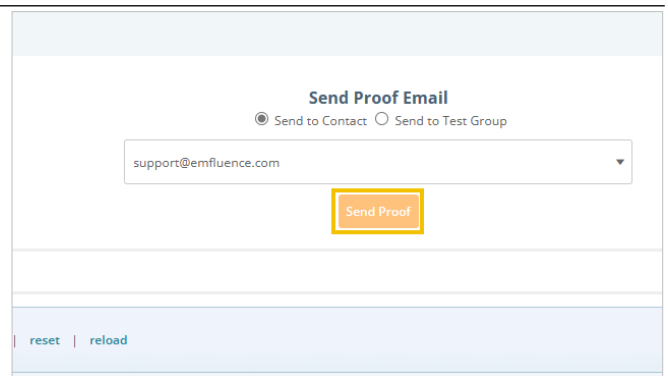


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You can use the **Contact Preview** field to preview as any contact. If you are using variable or conditional content, you can use this feature to confirm which content various recipients will receive. Start typing an email address into the field and select the address from the list. Recently used addresses will be save in the dropdown for reuse.



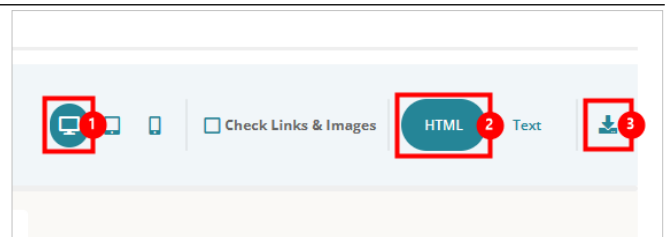
You can also send yourself a proof email by selecting an email address to send to and clicking **Send Proof**. The proof email will be identical to the final email but will include the word proof in the subject line.



If you are previewing as a contact, you can choose to send yourself the version you would receive or the version the previewed contact would receive.

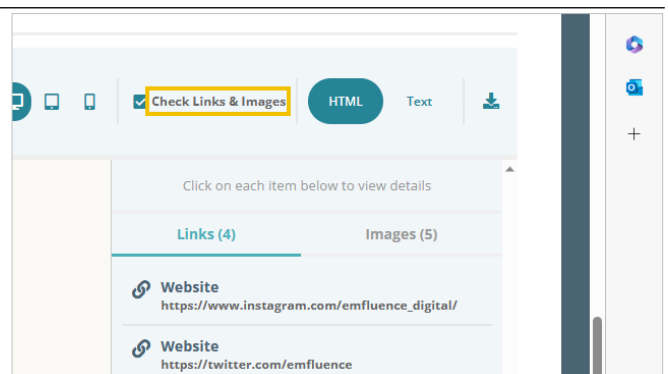
If you have a test group, you can select Send to Test Group and everyone within that group will receive a proof of the email.

Preview your email on different devices, view HTML and Text versions, and download a copy of your HTML

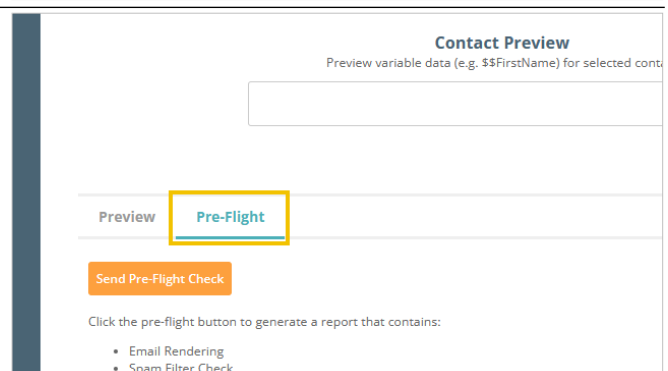


1. **Device Types:** Preview your email on desktop, tablet or small laptop, and mobile
2. **HTML / Text:** Preview both the rendered HTML and Text versions of your email
3. **Download:** Download the HTML of your email

Check the box for **Check Links & Images** to learn if there are any known issues with your images (such as missing alt text) or your links (such as buttons without links or invalid URLs).

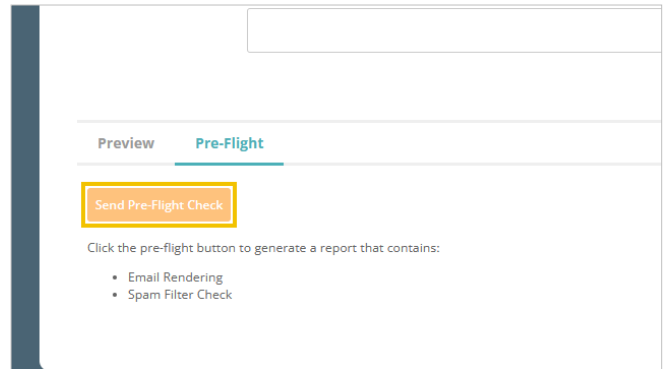


Pre-Flight is used to test how your email will render in different inboxes. emfluence will wrap up your HTML send it to Email on Acid who will render your email in different inboxes and devices, screenshot each one, and return results which can be previewed.



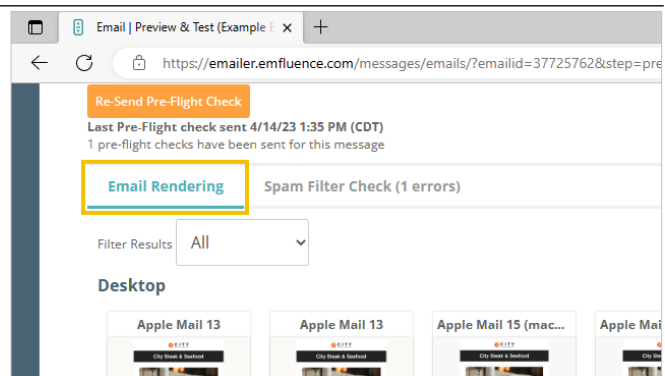
To run, click on the button **Send Pre-Flight Check** and confirm.

NOTE: There is a cost for using pre-flight, emfluence does not pass that on to clients but ask they don't abuse the feature. It is meant for one or two uses on an email.

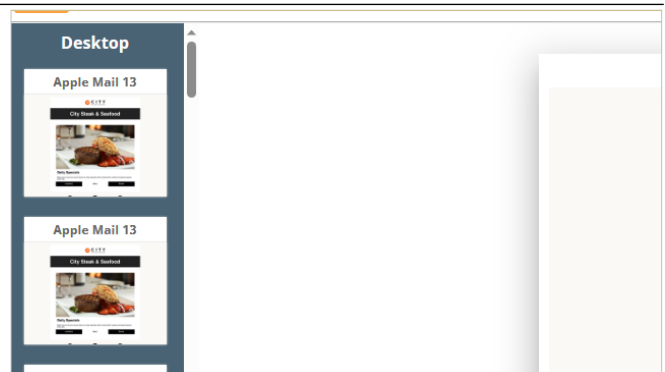


Under the **Email Rendering** tab you will find renderings in different inboxes. You can scroll through them one by one, click into any rendering individually, or use the **Filter Results** dropdown to narrow those shown.

NOTE: Some renderings take longer than others to return. Please do not re-click the pre-flight button as that will start an entirely new set of renderings.



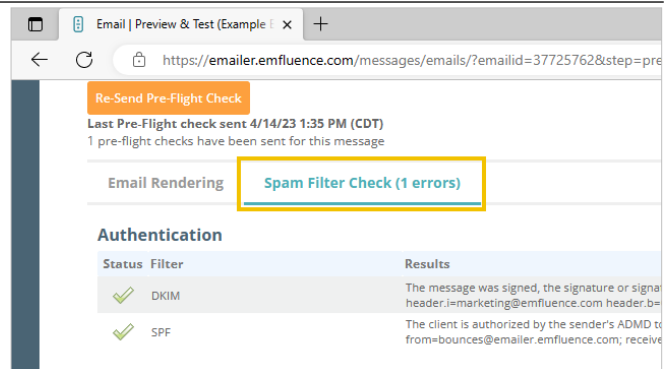
You can click on any rendering to view how the email showed up in that inbox. You can go through each example individually, or more likely, look for known inboxes from your device reporting to confirm the the email looks good to where your recipients are opening.



Under the **Spam Filter Check** you will find a baseline score for your email in different providers and spam filters along with confirmation that your authentication is still in place (if Authentication does not come back passing, please reach out to support@emfluence.com).

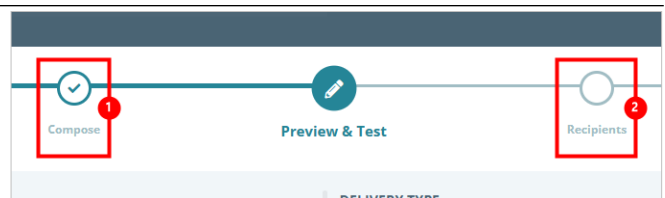
The spam scores are based on default sendings from an unknown sender, they provide a baseline but cannot take into account history with a recipient over time. They take into account email content and sender/domain/IP reputation.

Just because an certain inbox comes back without a check mark doesn't mean the email won't get through, it means, all things being equal (from an unknown sender), it is more likely to go to spam than the main inbox.



When finished on Preview, you can return to the Compose step or move forward to the Recipients step.

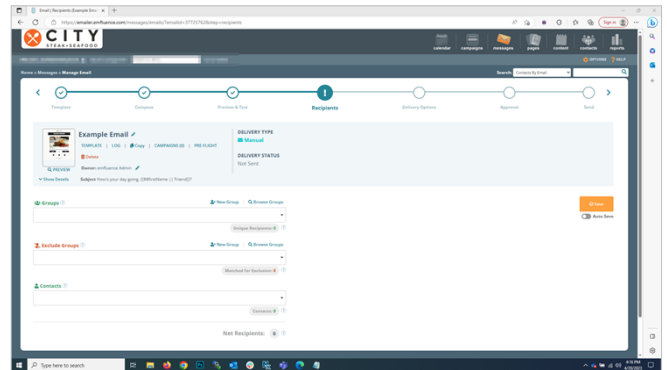
1. **Compose:** You may return to Compose to make any changes.
2. **Recipients:** If you don't need to make any



changes, you can move forward by clicking on the Recipients step.

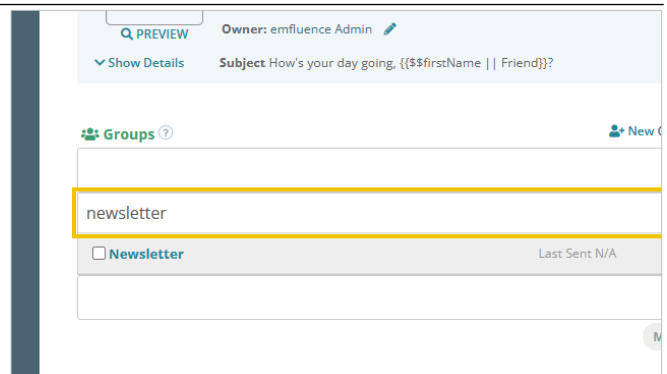
1.3. Add Recipients to Email

On the Recipients step you will choose which groups of contacts will receive your email.



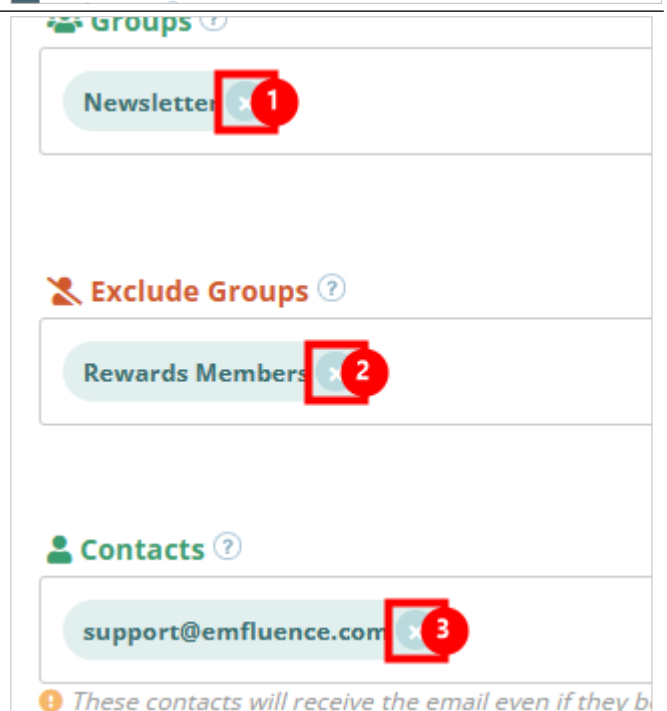
Click under Groups and type the name of the group you wish to add. You can also choose to create a new group or browse your account for a group if you can't remember the name.

Once you find your group, select it and add it to the email. Any available contacts at the time of the send in that group will be sent your email. On manual sends, you can send to multiple groups by selecting each group in this manner.

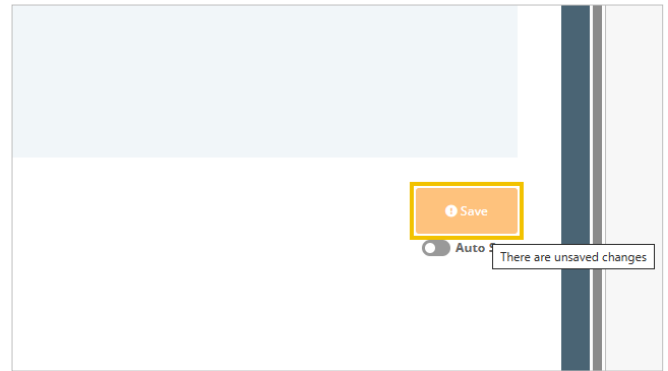


By choosing Groups, Exclusion Groups, and Contacts (for individual addresses to add to the send), you can decide which contacts will receive this email. The counts for each category will be displayed on the page with the final count of Net Recipients displayed at the bottom. NOTE: Any contact added in the bottom line will receive the email, even if you do employ exclusion groups.

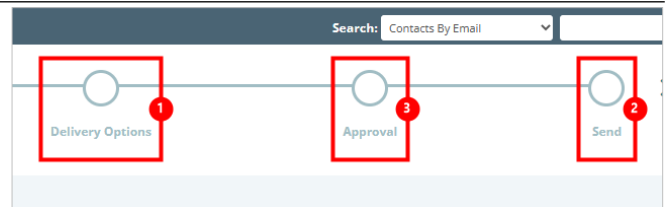
1. **Groups:** Add any groups you wish to receive your email in this line.
2. **Exclude Groups:** If you have occasion to send to one or more groups, but want anyone also in another group to be pulled out of the email, you can add them as an exclusion group.
3. **Contacts:** Add individual contacts to receive the email here. Example: If you wanted to receive a copy of the email, but didn't want to add your email address to the group, you could add yourself in the Contacts line



Click **Save** to save your recipients.



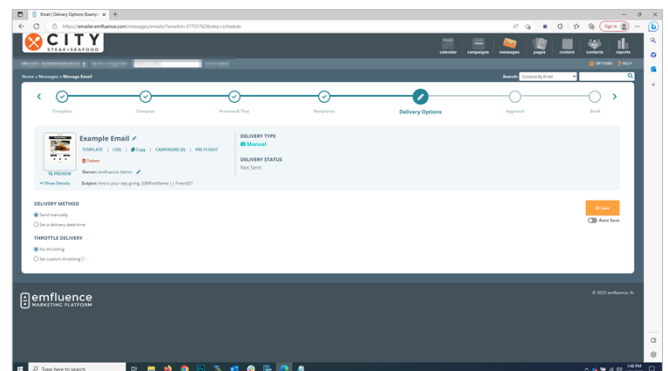
After finishing assigning recipients you can advance to Delivery Options to schedule a send time, or if you wish to send immediately* you can advance to the Send step.



1. **Delivery Options:** Advance to Delivery Options
2. **Send:** Advance to the Send step if you do not need to schedule the email and do not need an approver to approve the email.
3. ***Approval:** If the Approve Mail permission is enabled in your account, an approver will need to approve the message prior to it being able to be sent.

1.4. Email Delivery Options

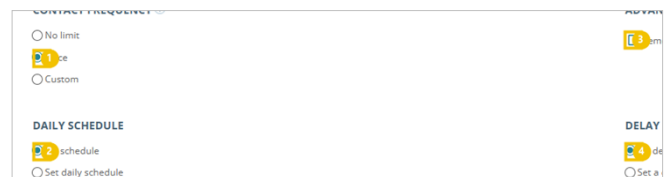
On Delivery Options, you can make choices about the timing of when your email is delivered.



1.4.1. Automated Emails

On Automated Emails you can set frequency, schedule, and delay.

1. **Contact Frequency:** Determines how often a contact can get queued for an email. The default is Once.
2. **Daily Schedule:** Allows you to set a schedule if you want to control the time an email is sent. If a schedule is in place, when contacts are added, they will wait until the scheduled time for the email to be sent. Daily schedule is necessary when the email is fed by a Dynamic Group.
3. **Advanced:** Under Advanced, you can choose to set whether or not to remove contacts from the source group after sending the email. The



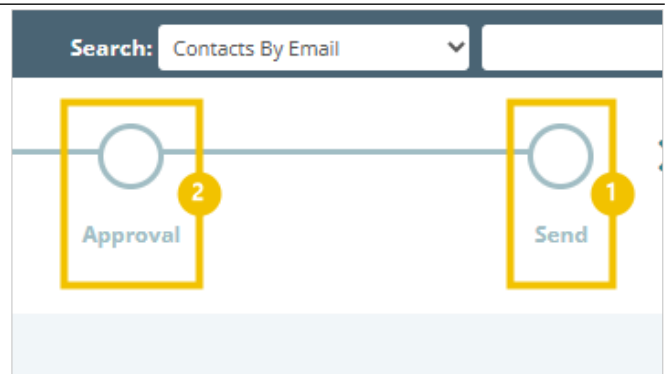
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default is to not remove them, but if you want someone to be readded to an email they could receive again, you would want to check this box.

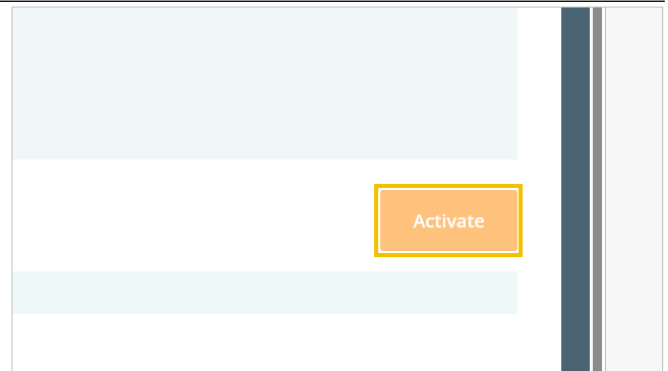
4. **Delay:** You can optionally set a Delay on an email in days, hours, and minutes. If a delay is in place, contacts will be queued for the entire delay duration prior to being sent. Rather than set a delay on an email, you may wish to use a Delay node on a workflow (unless your email is being fed by a Dynamic Group).

If Approve Mail is not turned on in your account, you can proceed to the Send step. If approval is activated, you will have to request approval before being able to send your email.

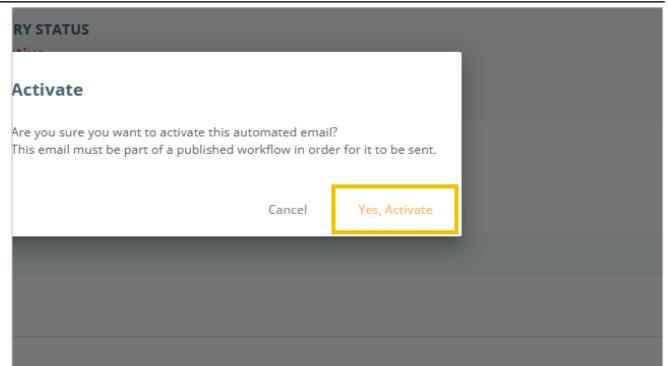
1. **Send:** Advance to the Send step
2. **Approval:** If Approve Mail is turned on in your account, you will need to request approval before being able to send.



When arriving on the Send step, a check will run to alert you of any errors or warnings. If no errors appear, you can click on the button **Activate** to turn on your automated email.

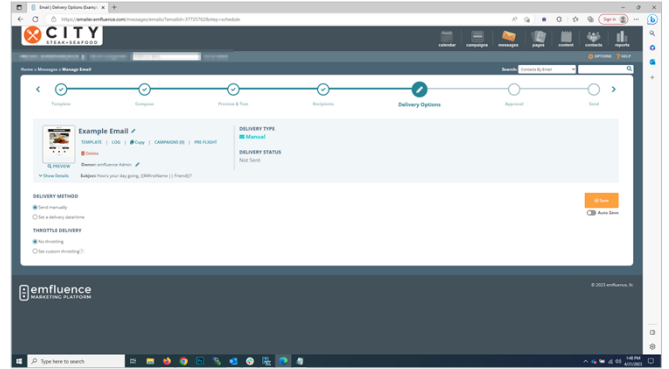


You can confirm your action by clicking **Yes, Activate**.

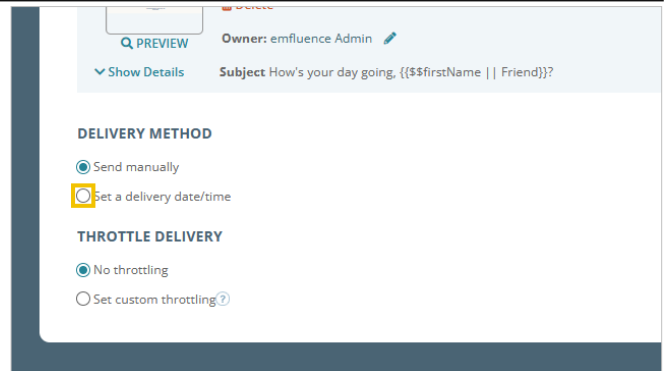


1.4.2. Manual Emails

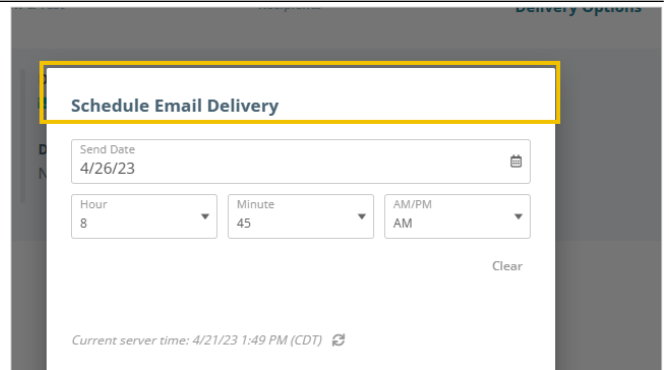
For manual emails, you can schedule and email to send in the future at a specific day and time. If you want to send ASAP and don't wish to set any options, you can advance to the next step.



To schedule the email to deploy at a date and time in the future, toggle the radio button to **Set a delivery date/time**.

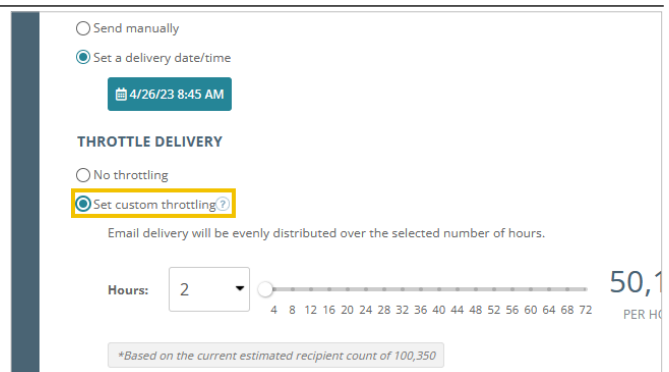


In the **Schedule Email Delivery** pop-up, set a date and time in the future and click **Apply**.

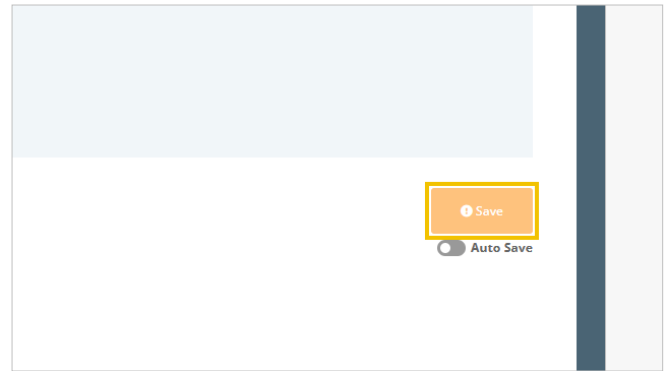


Normally, there is no cause for throttling your send. However, if you do wish to slow down your send, for example to slow down response to your email, and throttle it over multiple hours, you can do this by clicking **Set custom throttling**.

Use the slider or dropdown to set the number of hours to throttle your list. The per-hour rate will display to the right of the slider.

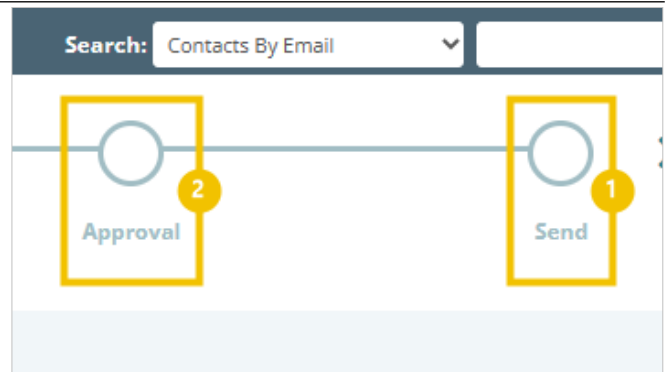


Click **Save**.



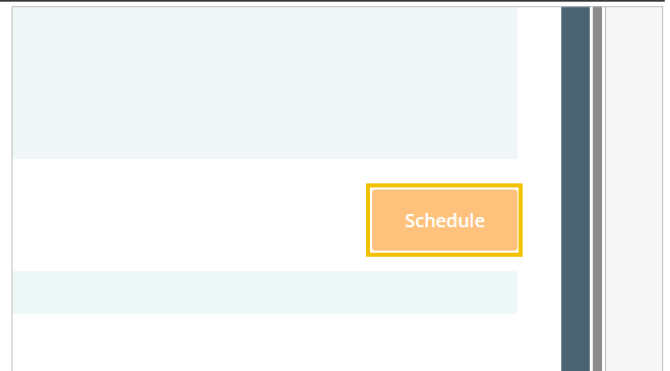
If Approve Mail is not turned on in your account, you can proceed to the Send step. If approval is activated, you will have to request approval before being able to send your email.

1. **Send:** Advance to the Send step
2. **Approval:** If Approve Mail is turned on in your account, you will need to request approval before being able to send.

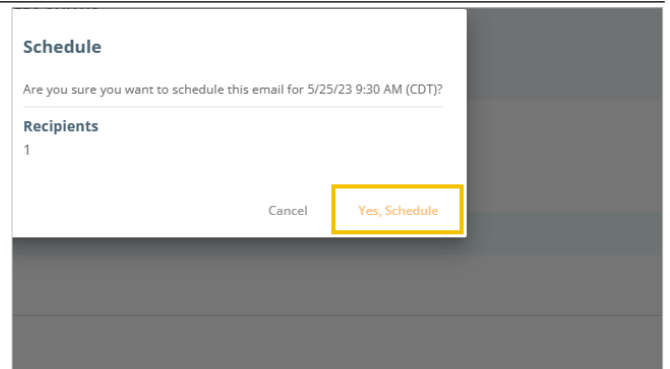


When arriving on the Send step, a check will run to alert you of any errors or warnings. If no errors appear, you can click on the button. If you have set a date in the future the button will say **Schedule**, and if you have set the email to ASAP, the button will say **Send**.

NOTE: An email can not be unsent. If you cancel the email before all recipients are sent to, the remaining won't be sent the email but there is no way for emfluence to retrieve the emails already sent out to your recipients.



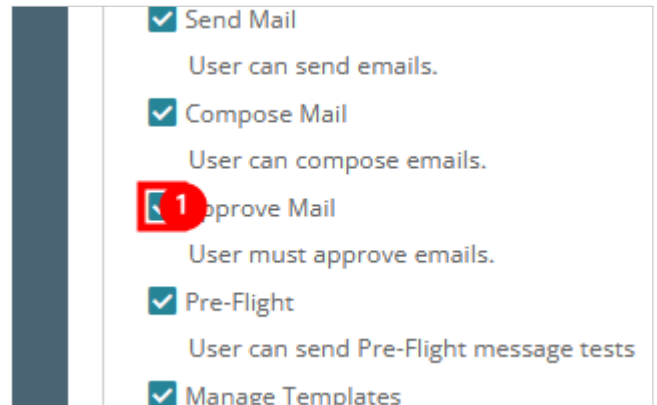
Confirm your choice by clicking on **Yes, Schedule**.



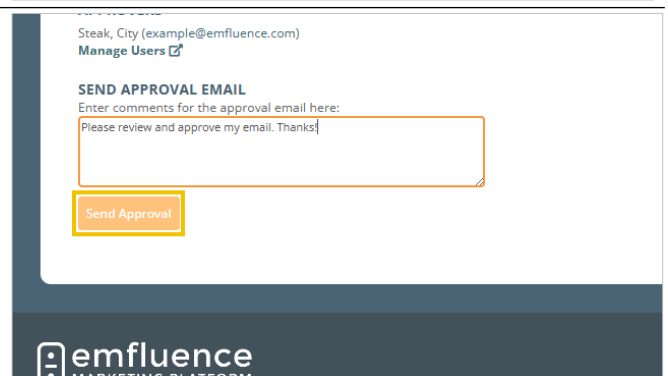
1.5. Email Approval

The Approval step can be ignored if no users have been granted the Approve Mail permission. However, any user with that permission must approve an email before it can be scheduled or sent.

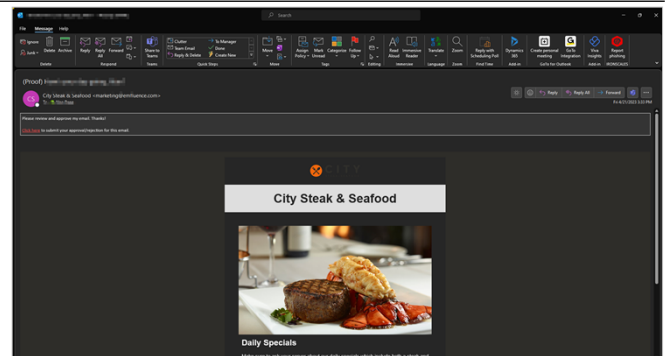
1. **Approve Mail:** If checked, this user must approve an email before it can be sent.



If there are one or more approvers in your account, you can type a message within the Send Approval Email box and click **Send Approval**.

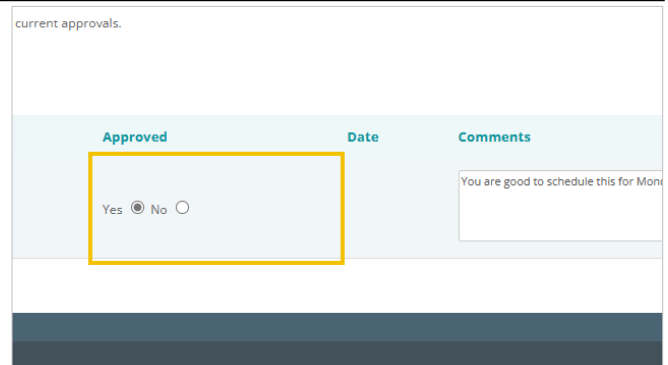


Your approver(s) will receive a proof email with your message at the top and a link which will take them into the platform to either approve or not approve the email.



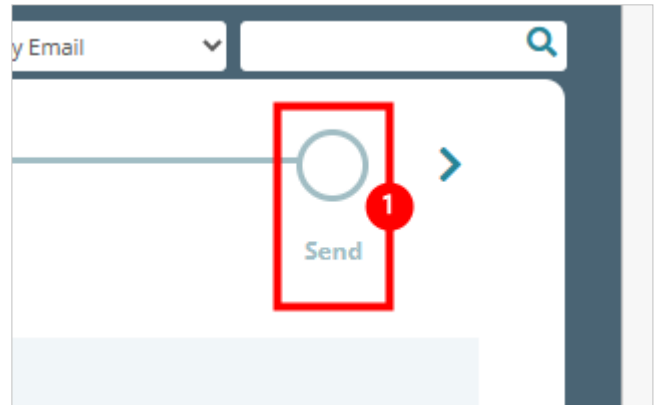
Following the link from the email, the approver can mark the message approved **Yes** or mark it **No** if they deem edits need to be made. They can also offer an optional message such as what the user needs to fix if the email wasn't approved.

NOTE: Once approved, the email cannot be edited on any previous step without having to be approved again.



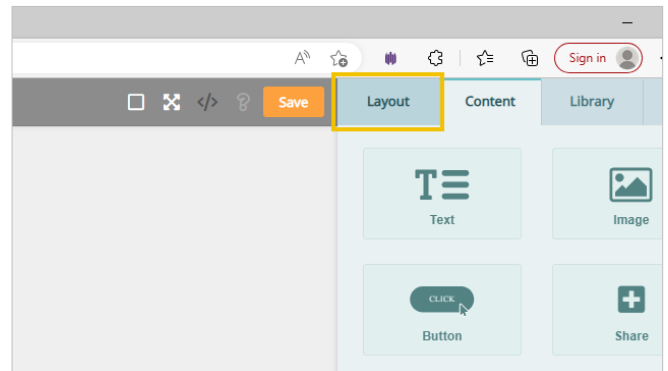
Once approved, you can continue and send the message.

1. **Send:** Advance to the Send step

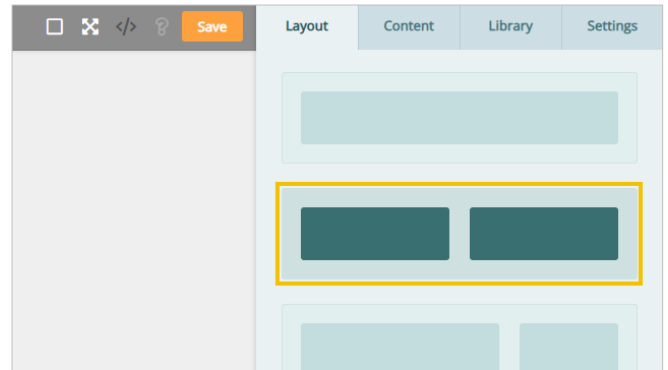


1.6. Drag and Drop Mobile Stacking

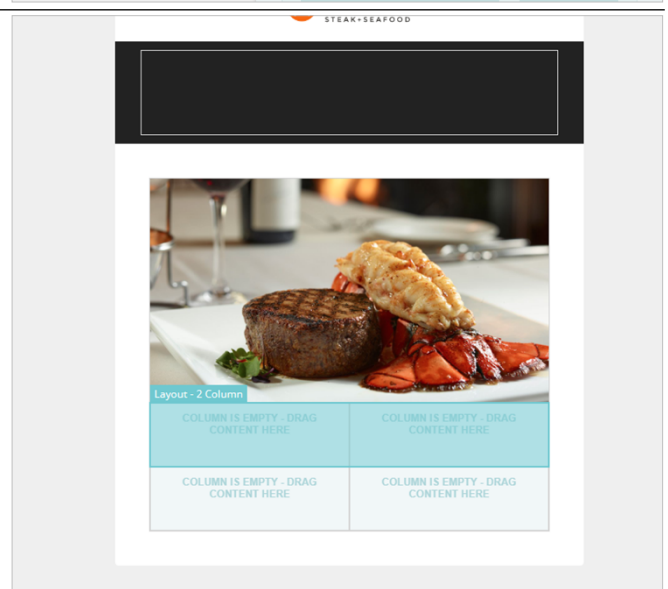
When using Layouts as part of the Drag & Drop editor, you can apply stacking logic to any 2-column layout. To begin, click on **Layout**



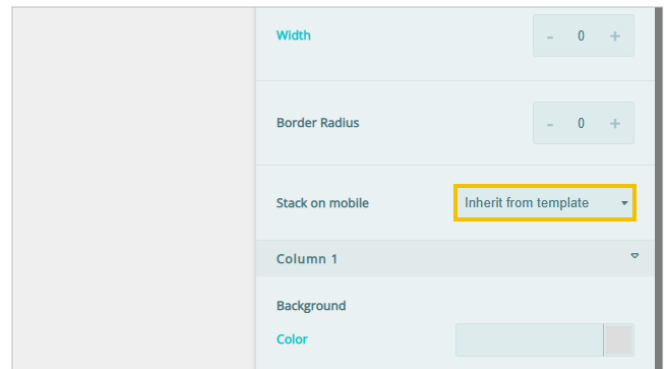
Choose any of the 2-column Layouts (50/50, 30/70, or 70/30) and drag them into your email



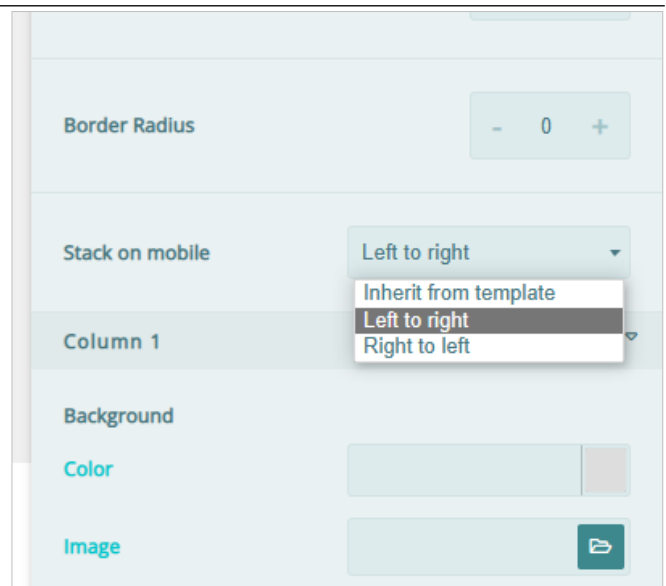
With Layouts now in your email, you can now set stacking logic. NOTE: Your email template must be mobile responsive to make use of this feature



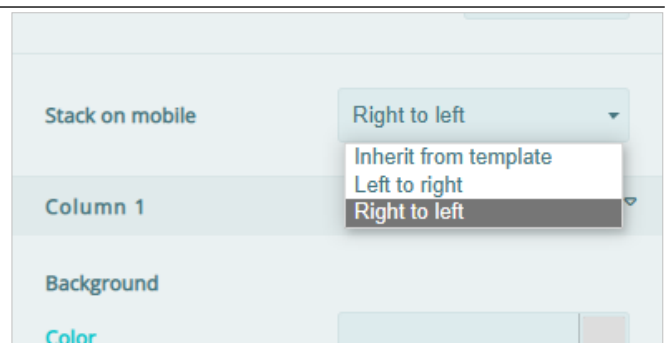
Under **Settings** for the **Layout**, find the **Stack on mobile** section. The default choice will be to **Inherit stacking from the template**



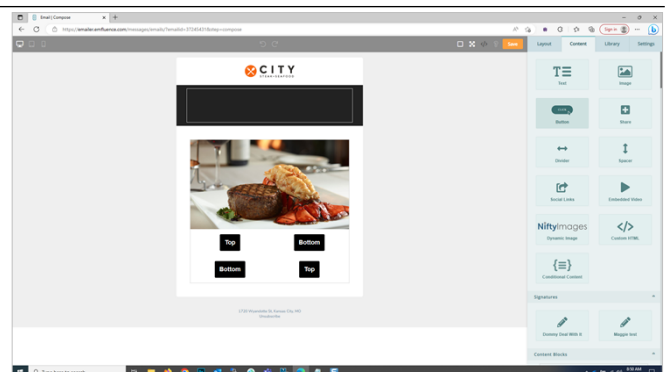
To force a layout to stack Left over Right on mobile, choose Left to Right



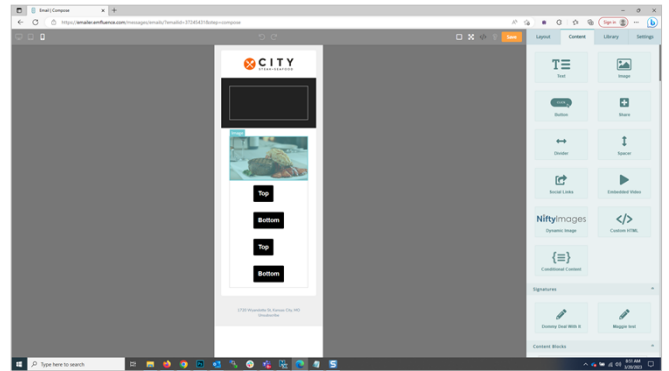
To force a layout to stack Right over Left on mobile, choose Right to Left



Add content into your layouts using the Drag & Drop editor

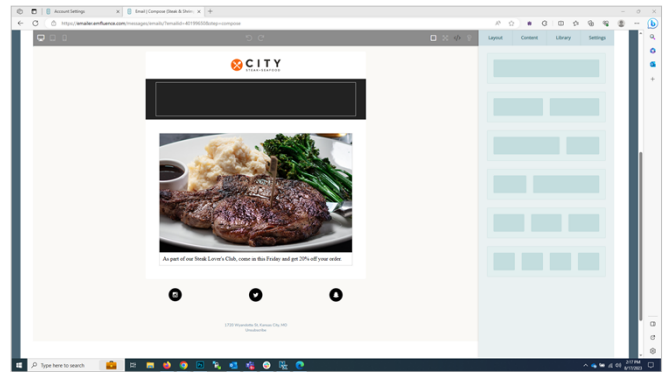


You can preview your responsiveness both on the Compose step and on the Preview step. We suggest also sending a proof to confirm your layouts are stacking as intended in your inbox

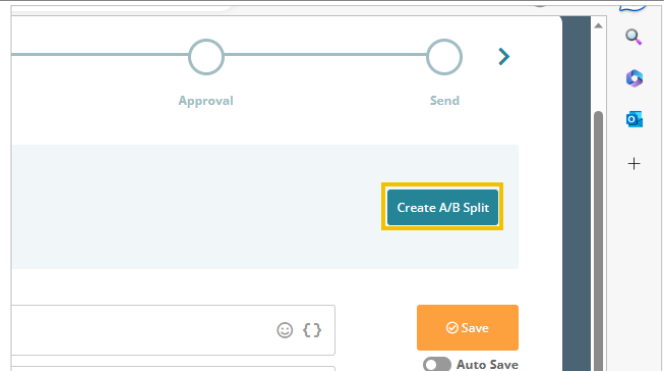


1.7. A-B Testing

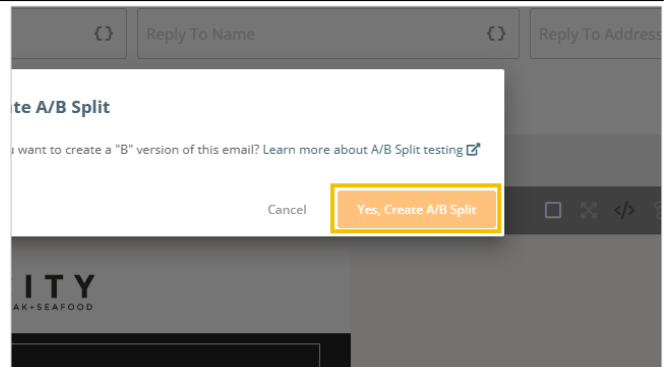
You can use A/B Split to test different messaging to your contacts. Built into manual email sends, you can create multiple copies of an email. Certain segments of the groups chosen will receive one of your emails with the remainder getting the email deemed to have performed best in your testing.



We suggest first making one version of your email, then clicking **Create A/B Split**.

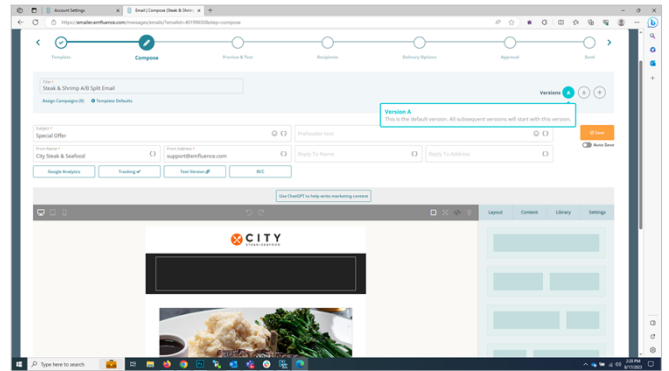


Confirm by clicking on the button **Yes, Create A/B Split**. You can create up to 5 different versions of your email following these same steps.

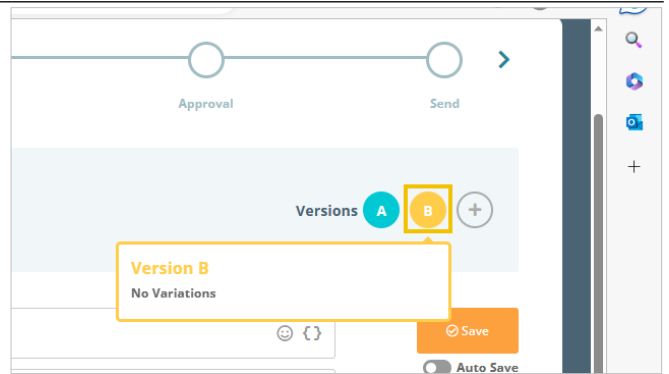


emfluence Help Section

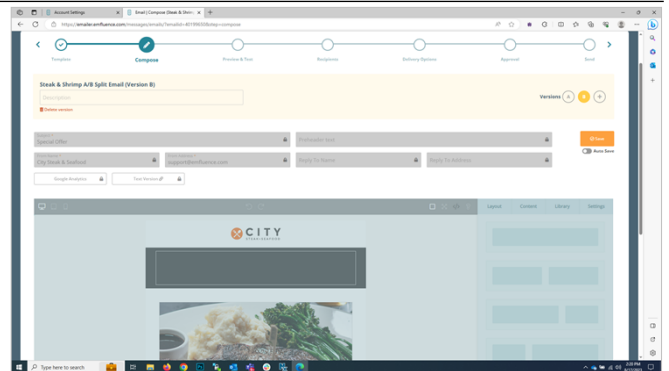
Your original email will now become your A version. You can toggle between versions, to edit them individually by clicking on the letters of each version. To create a third version, click the plus sign and confirm.



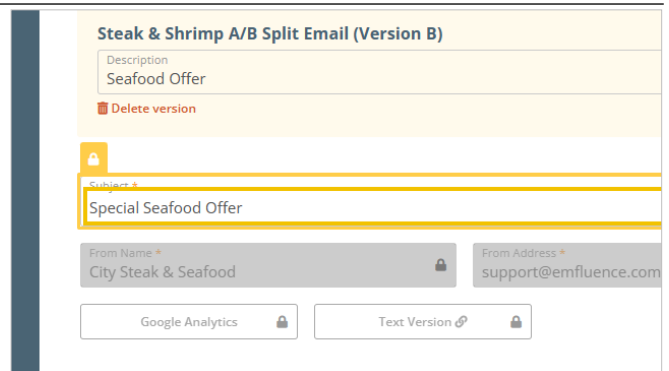
To edit your B version, click on **B**.



When you load your new version for the first time, all content will be locked. Click into any section of the email to unlock it and change the content.



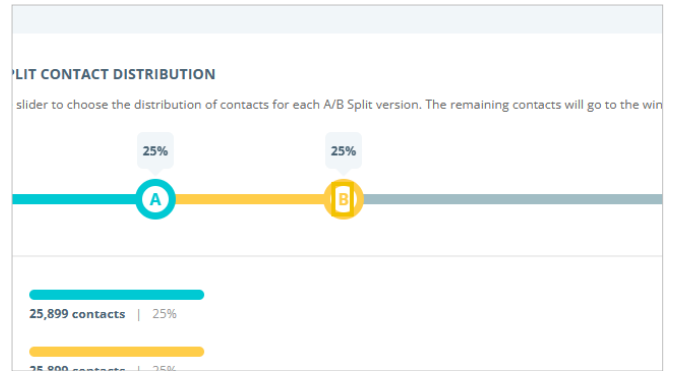
Now unlocked, you can edit the content just as you would any email.



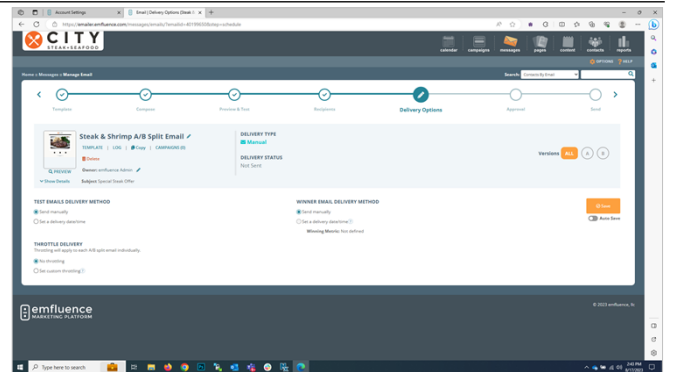
emfluence Help Section

You can preview all versions of the email on the **Preview** step. Advancing to the **Recipients** step, you will choose your group and then set the size of the segments.

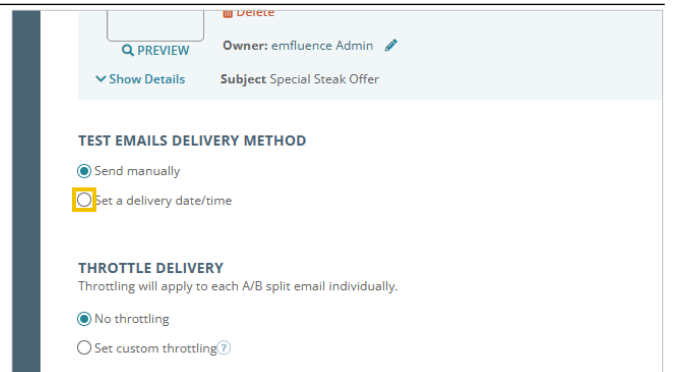
Contacts will be dispersed randomly into the different segments with a section being held out for "winning segment." You can edit the size of each segment using the sliders provided.



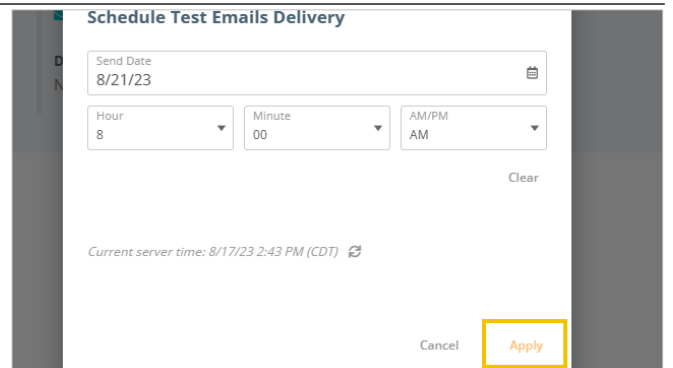
On the Delivery Options step, you can choose to send now or schedule your send. If you schedule your send, you will also unlock the ability to schedule your winning email. If you choose not to schedule your winning email, you can still manually send it on your own.



To set a delivery date and time, click the radio button for **Set a delivery date/time** under the TEST EMAILS DELIVERY METHOD menu.



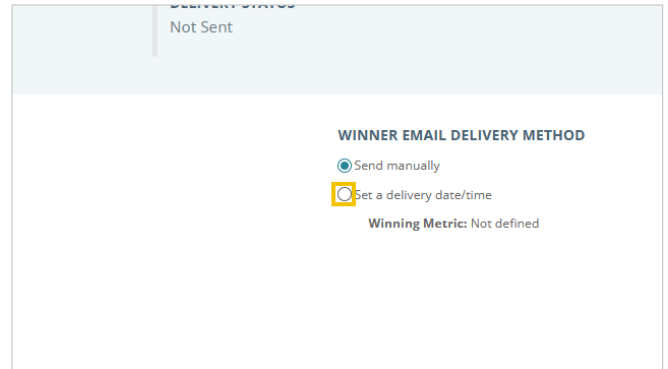
Choose a date and time in the future, and then click on **Apply**.



emfluence Help Section

To schedule your winning email, check the radio button for **Set a delivery date/time** under WINNER EMAIL DELIVERY METHOD.

NOTE: You cannot schedule a winning email unless you first schedule the delivery of your initial segments.

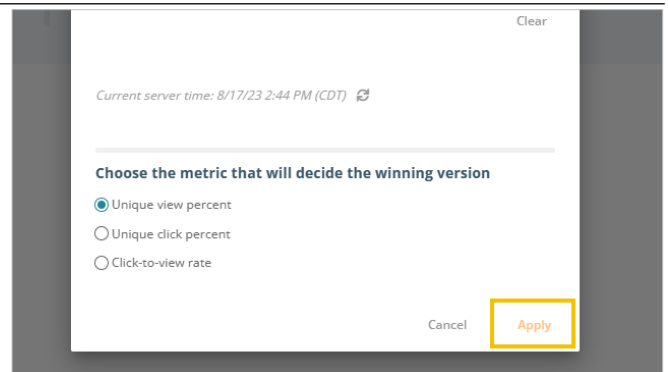


Select your date/time for delivery which will need to be after the time scheduled for your initial segments.

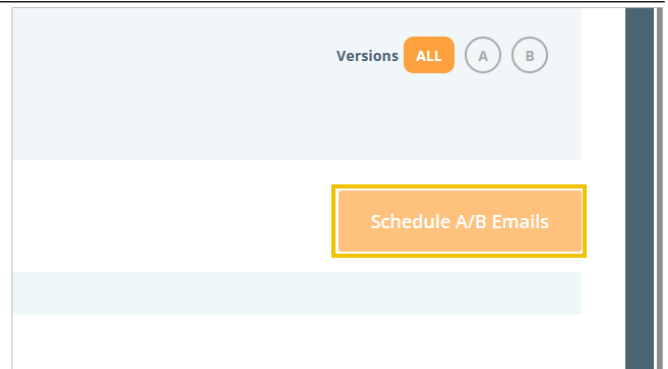
Next, choose your winning metric which can be either the highest view/open rate, the highest click rate, or the highest click-to-view rate.

NOTE: If you don't schedule the winning email, you can manually choose the winner on any criteria you wish.

Finally, click on **Apply**.

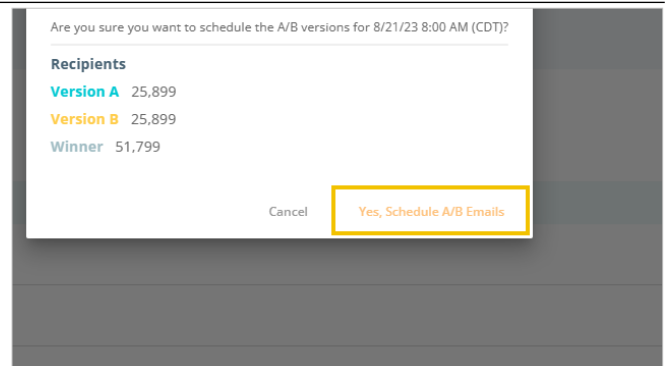


Proceed to the **Send** step and click to **Schedule A/B Emails**.



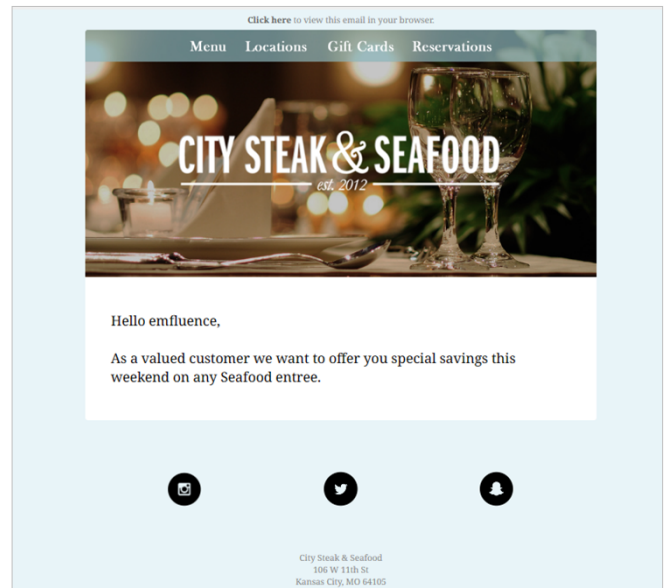
The platform will provide a breakdown of your split. Review and click **Yes, Schedule A/B Emails**.

Your email is now scheduled. If you chose not to choose a winning metric and schedule the winner email, don't forget to return and manually choose your winner to complete the send.

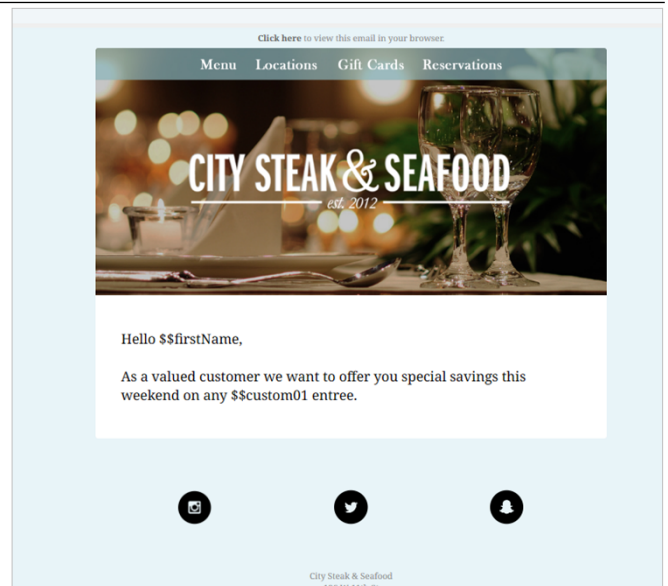


1.8. Using Variable Content

Variable content can be used to customize your messaging by pulling saved data from a contact's record. This data can come from standard fields such as email, first name, last name, etc. as well as custom fields specific to your platform account.

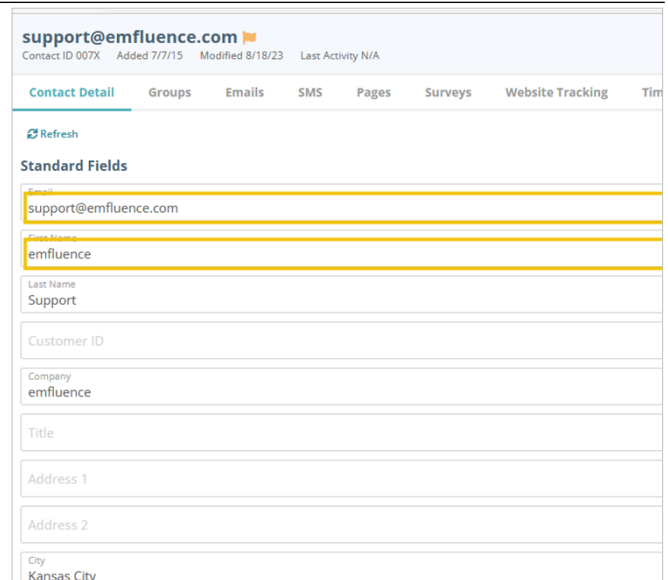


By inserting the variable placeholder in your email, whatever value is saved in that field on an individual's contact record is what will be filled in when they receive the email



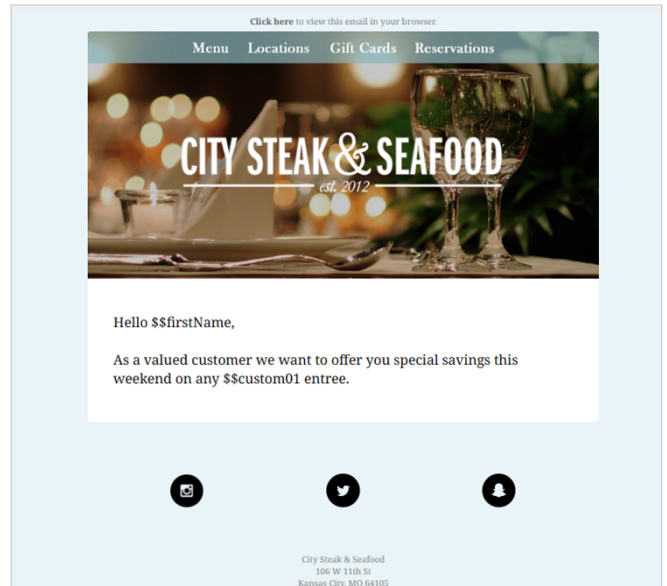
On an import, manual save, API call, or data sync, data is saved on the contact record.

1. **Email:** The saved email address for this contact.
2. **First Name:** The saved first name value for this contact.

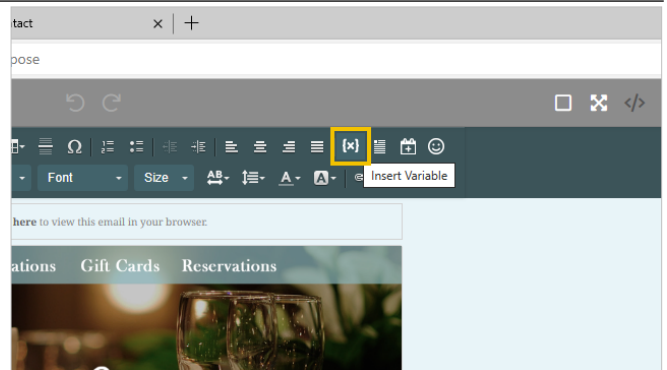


emfluence Help Section

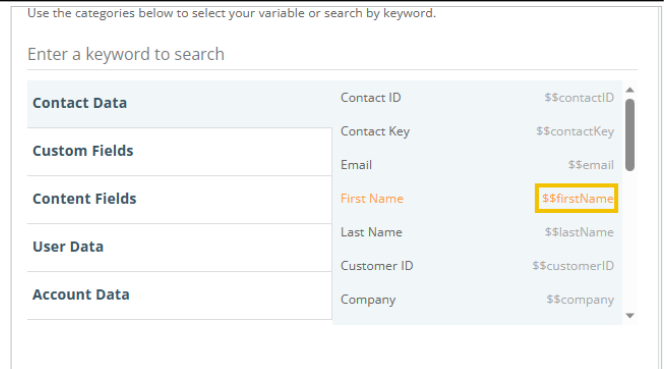
When using variables, you will insert the variable to the corresponding data point. Whatever is saved in that field is what will be inserted into the email.



To insert a variable inside a text element, first place your mouse where you wish the variable to go. Next, click on the **Insert Variable** icon in the text editor menu.

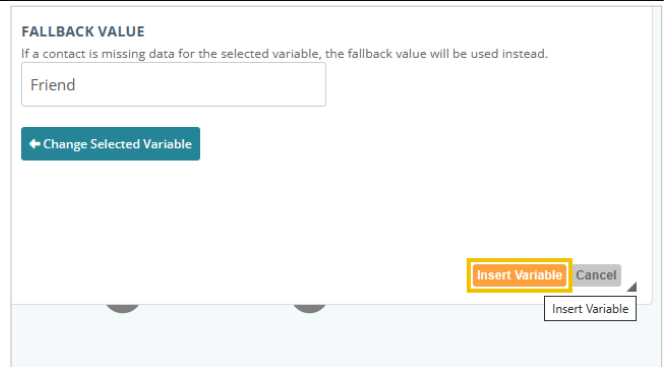


Find and choose the variable you want from the pop-up menu. In this example, we want to insert the contact's First Name. This is a standard field that can be found under Contact Data. Find and click **\$\$firstName**.



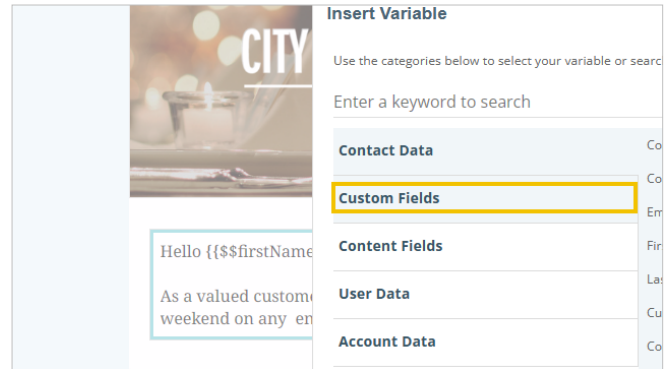
You will be prompted to choose a **Fallback Value**. If no value is saved in that field on a contact's record, in this example First Name is blank, the platform will use the **Fallback Value**. You are not required to use a Fallback Value. However, if you do not use a fallback, a blank entry will insert a blank space into your email.

Type in your Fallback Value. Then, click **Insert Variable**.

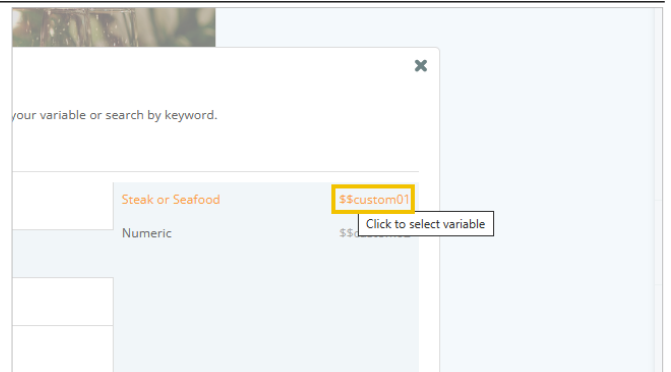


emfluence Help Section

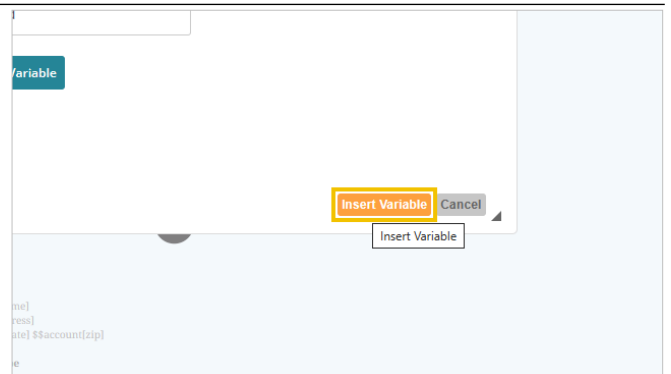
Custom Fields are located in the Options menu. These are non-standard data points created by members of your account to save specific data on the contact record. To use one as a variable, click on the menu for **Custom Fields** after clicking the Variable icon.



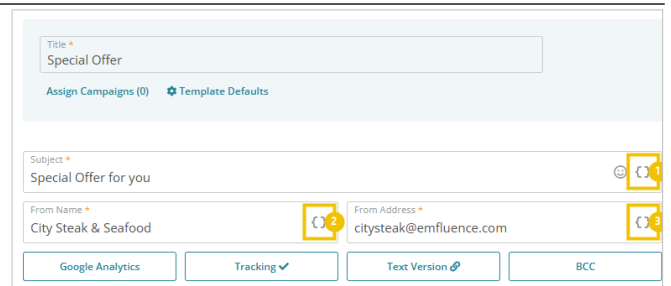
As with standard fields, the menu will show both the friendly name of the field and the variable ID. While standard fields have a variable ID similar to the name of the field, custom fields are simply numbered. To add your custom 1 field, find and click on **\$\$custom01**.



Type in your fallback value and click on **Insert Variable**.

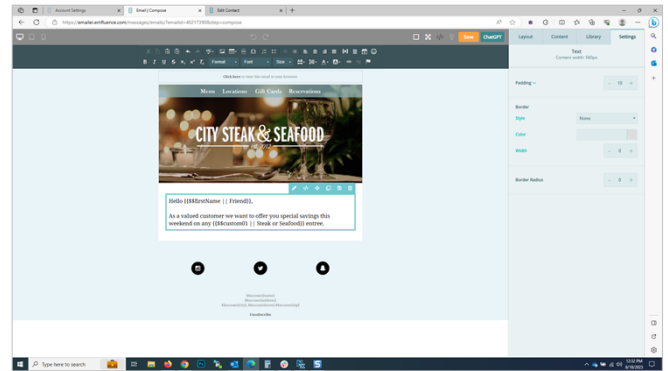


Variables can also be inserted into the Subject Line, the From Name and From Address of your email, and also the Reply To Name and Reply To Address of your email. Be careful of using variables for email addresses and make sure all recipients have a valid value on their records.



1. **Variable Picker:** Click to insert a variable into the subject line of your email
2. **Variable Picker:** Click to insert a variable into the from name of your email. NOTE: Make sure you use fallback value as emails CANNOT be sent without a from name.
3. **Variable Picker:** Click to insert a variable into the from address of your email. NOTE: The value on the contact record must be a valid email address and must be from a domain you are permitted to send from in the platform. Any email without a valid and supported email address will fail to send.

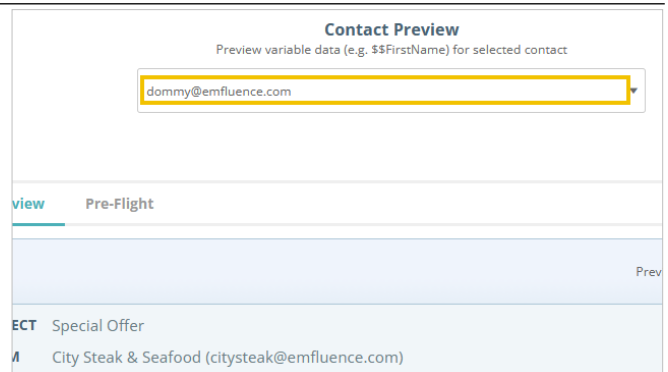
You will now see the variables inserted into your email. After saving, you can advance to the Preview step and check your contacts to confirm the values are correct.



On the Preview step, you can test different contacts using the **Contact Preview** dropdown. With each contact you will see what values are used for each variable in your email.

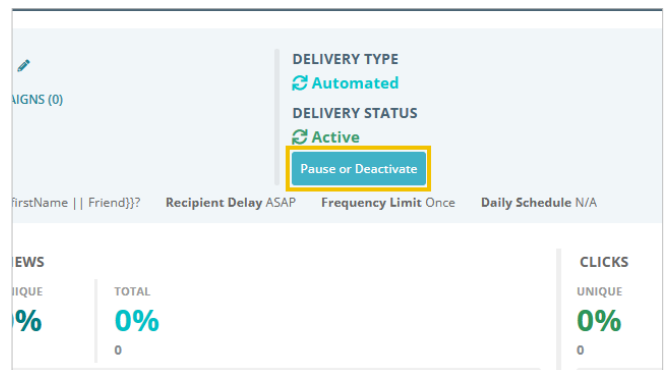
While previewing as another contact, you have the ability to send a proof of that email to yourself, another member of your team, or to a testing group.

Always test when using variable content.

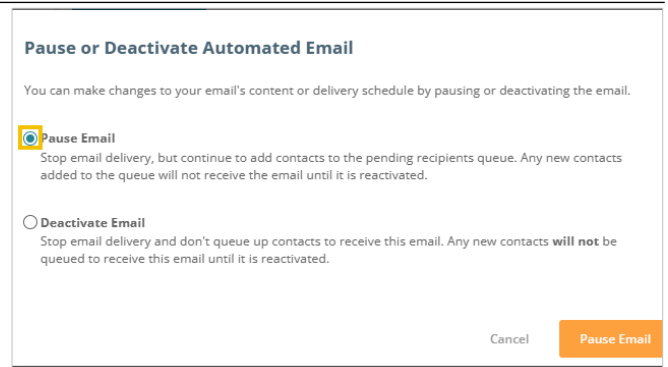


1.9. Pause & Deactivate Emails

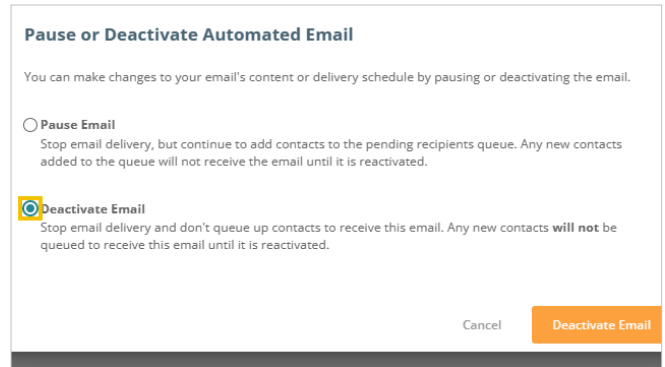
Active automated emails can be paused or deactivated by clicking on the button **Pause or Deactivate**



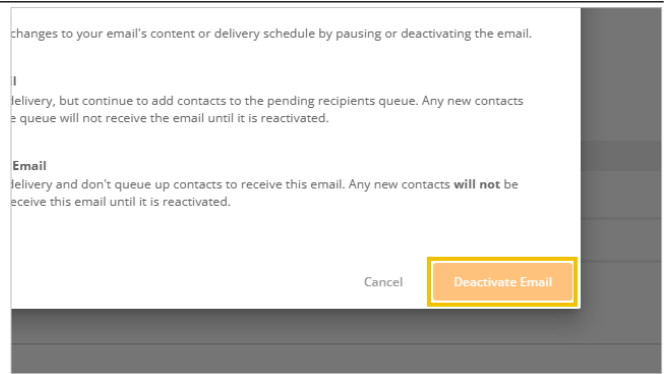
Choosing **Pause Email** will turn off the email but leave existing contacts in the email queue and continue to add contacts to that queue. Choose this option if you plan on making minor changes and reactivating and don't want anyone's progress in your workflow to stop.



Choosing **Deactivate Email** will also pause the email, but it will also stop queuing up contacts for this email. Use this option if you plan to have the email deactivated for an extended period of time and/or you are removing it from the workflow (possibly replacing it with a different email).

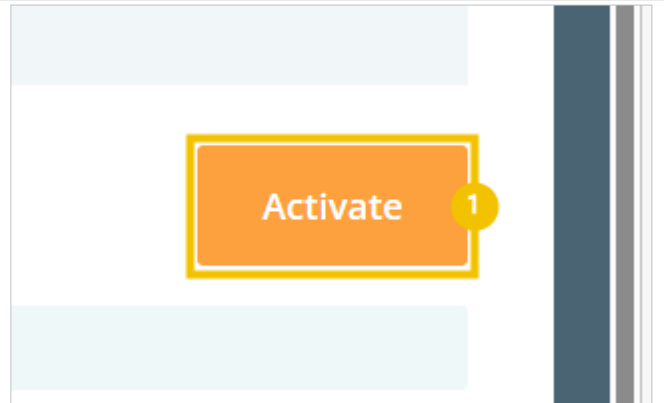


After making your choice, click on the button at the bottom of the modal to either **Pause Email** or **Deactivate Email**



Your email is no longer in an activated state. You will see under Delivery Status "Inactive" is now shown.

1. **Activate:** You can reactivate your email by clicking on the Activate button on the Send step.



2. Contacts

2.1. Import Contacts

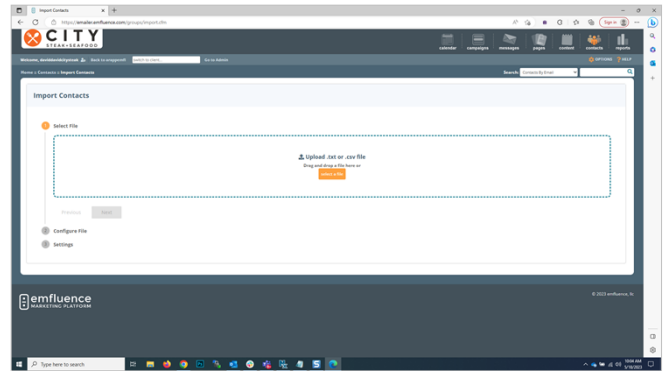
Contacts can be added to the platform manually by importing a file on either the home screen, in the contacts section, or through the top navigation dropdown.



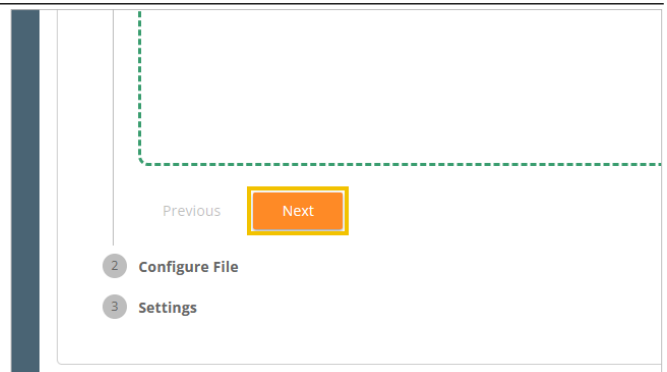
1. **Import Contacts:** Advances you to the import file menu.
2. **Import Contacts:** Advances you to the import file menu.

emfluence Help Section

The first step of the import process is to drag a file into the window or use the Select File option to find a file on your computer. Your file must be either a CSV or TXT document.

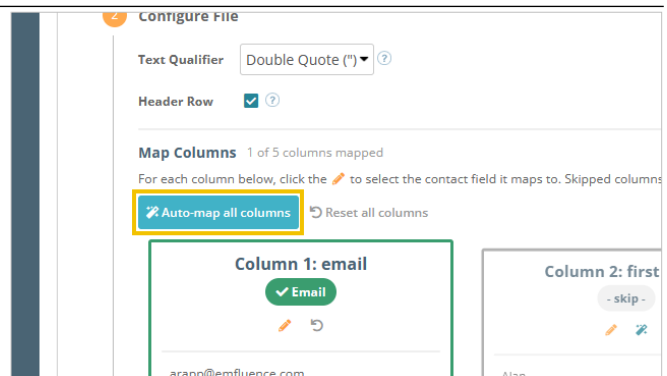


After adding your file, make sure the file type is accepted and click **Next**.

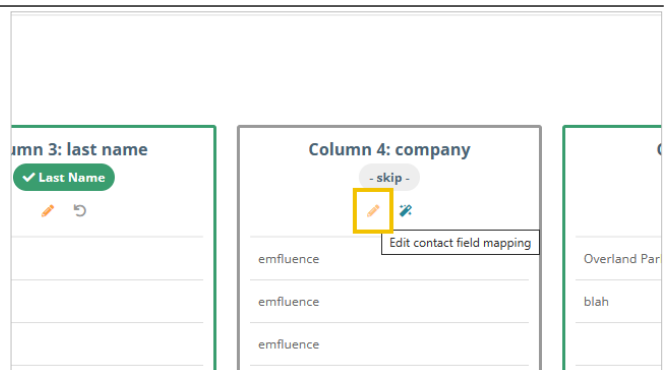


If your file contains a row with column names which match values in emfluence, you can click **Auto-map all columns**. Email must be one of the fields mapped.

NOTE: Only columns mapped will be imported. Any data in columns not mapped will be thrown out in the import process.

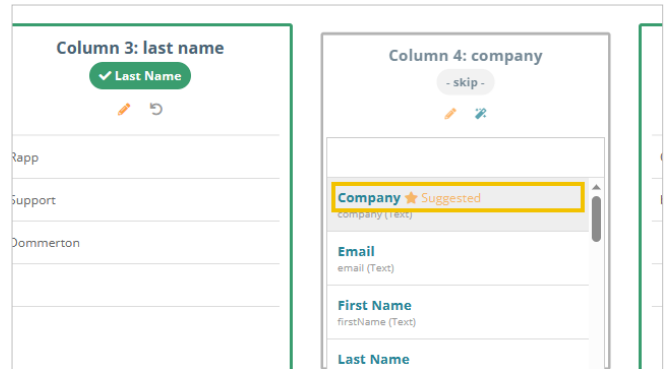


Any columns not mapped, you can manually map by clicking the pencil to **Edit contact field mapping**.

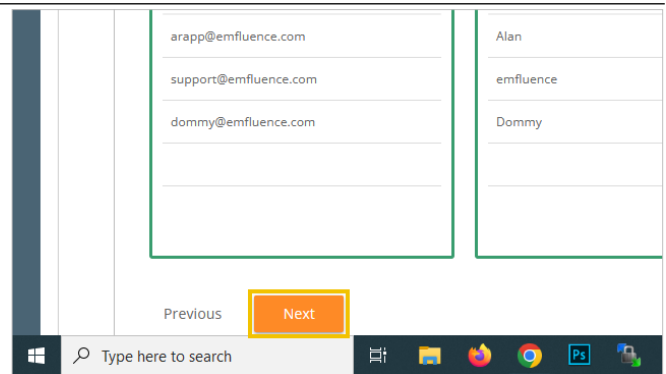


emfluence Help Section

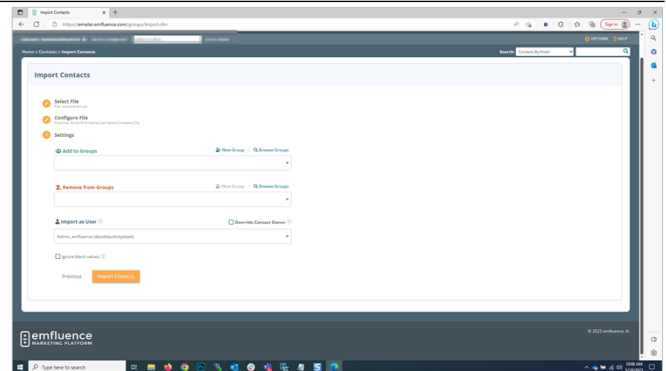
Manually choose the correct field in the dropdown. Make sure you are mapping data of the same type (text to text, date to date, etc.). Data that doesn't match in a single field can cause an entire row of data to fail.



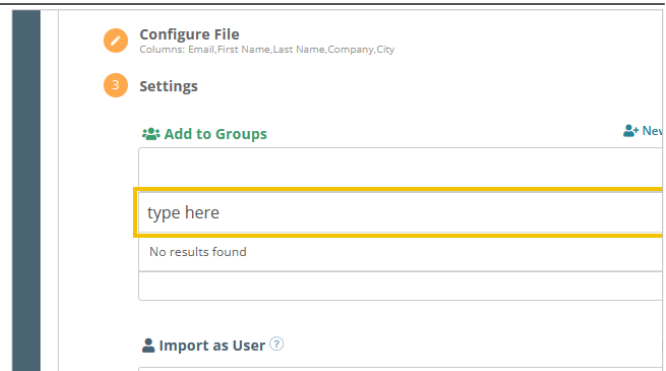
After your mapping is finished, click **Next**.



On the Group step, choose which groups to import contacts. You can import into existing groups or choose to create a new group.

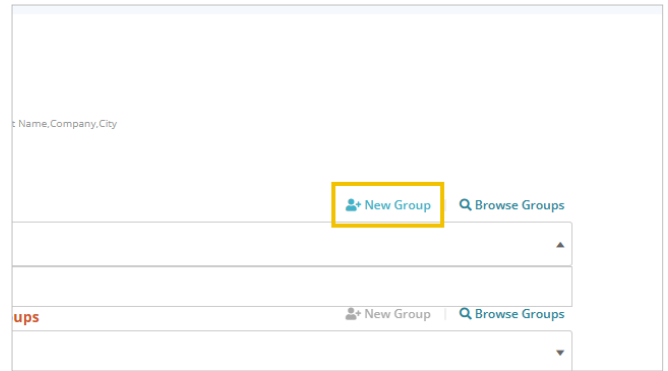


To add contacts to an existing group you can either click the **Browse Groups** option, and select the groups from your existing list, or start typing the name of the group in the **Enter Group Name** field and select the correct group from the results. You can import to multiple groups.

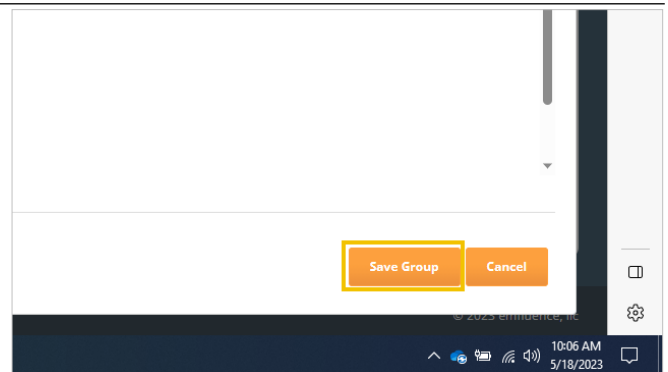


emfluence Help Section

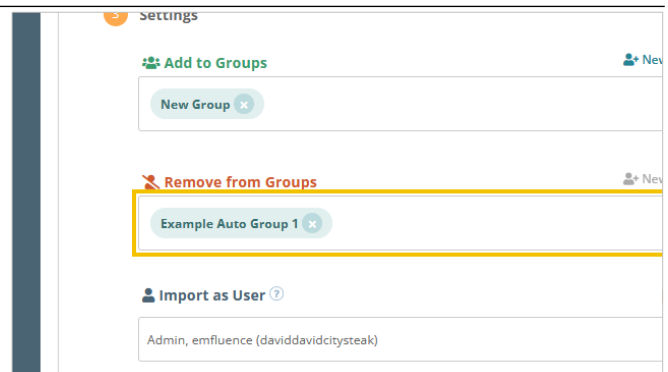
If there isn't a preexisting group, you can create a new group by clicking **New Group**.



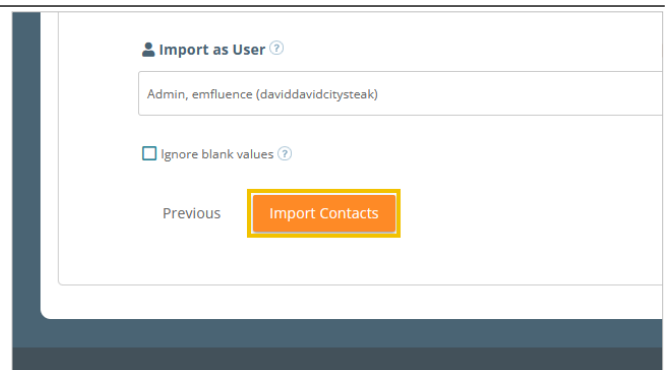
After filling out the name of your group and setting preferences click on **Save Group**.



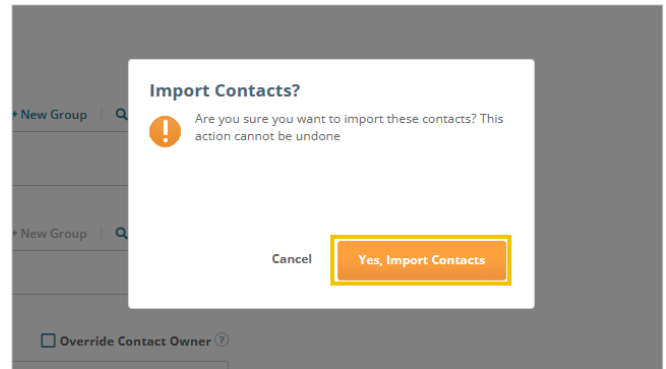
Optionally, you can use the **Remove from Groups** feature to use an import to pull contacts out of a group in bulk.



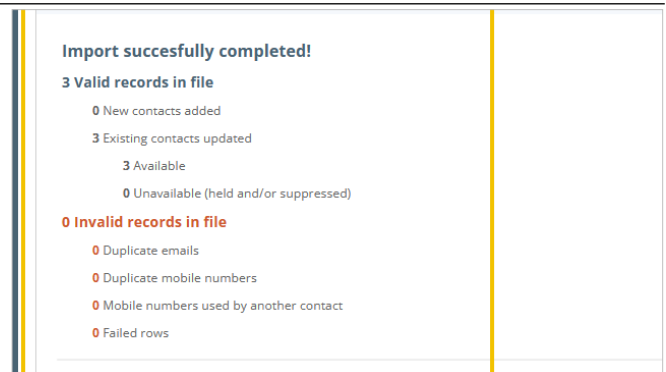
After selecting your groups, click **Import Contacts**.



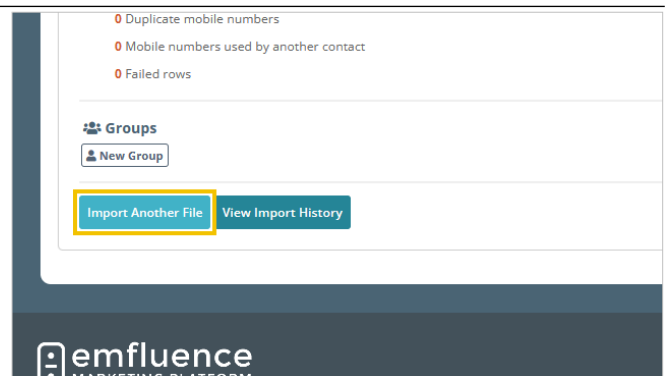
Since you cannot stop an import in process, you will be asked to confirm your option to import. Click **Yes, Import Contacts**.



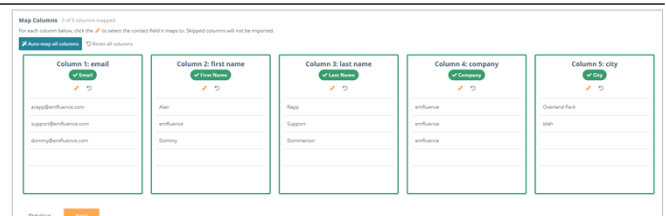
The **Import History** page will offer a summary of your import including number of new contacts added, number of existing contacts updated, what groups contacts were added to and any failed rows in your file. This information can be found later by searching previous imports in the Import History link found in the top navigation menu under **Contacts**.



After finishing, you can choose to **Import Another File**, go to the full **Import History Page**, or navigate to another part of the platform.

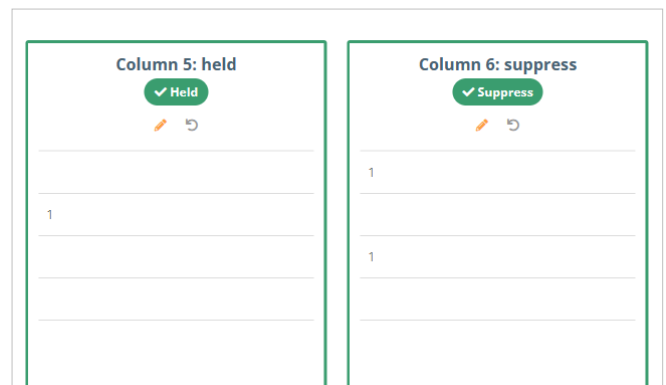


If you choose to import another file, and your file has the same number of columns in the same order, the import will remember your mapping. However, this only occurs when utilizing the Import Another File option.



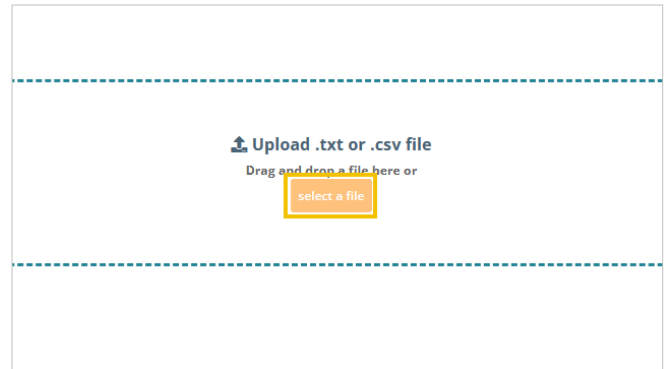
2.2. Import as Held or Suppressed

If you have a list of contacts you wish to add to your account and also prevent them from being sent to in the future (to avoid them getting added later on as an available contact) you can upload them as Held or Suppressed

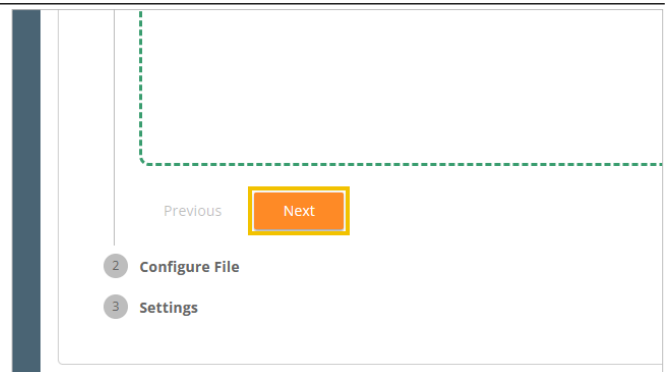


emfluence Help Section

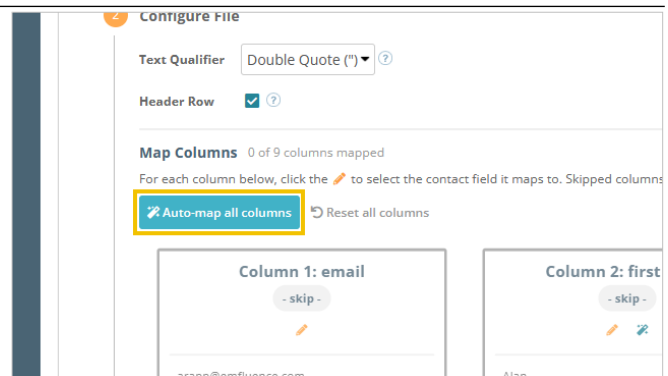
Upload as normally by clicking on the button **select a file**



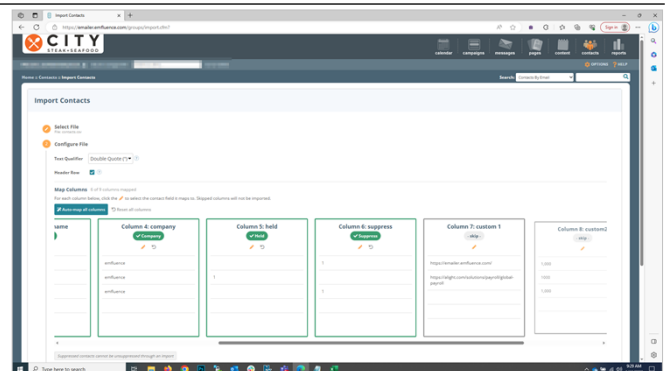
After choosing your file, click on the button **Next**



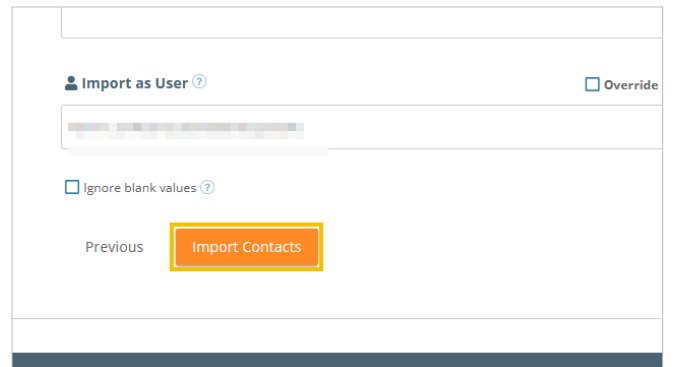
Map your columns. If you have included headers in your file, you can attempt to auto-map them by clicking on the button **Auto-map all columns**



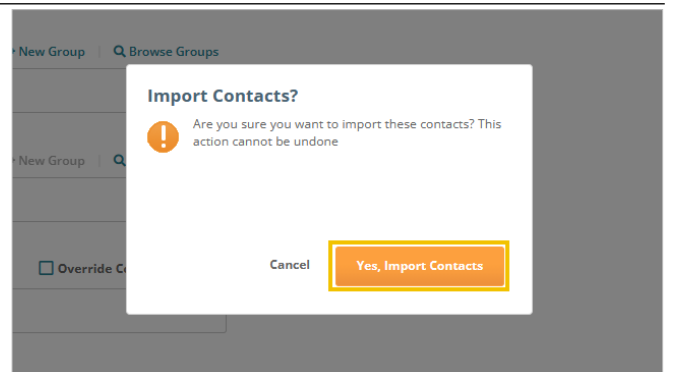
Any columns not mapped, can be mapped manually by clicking on the pencil under that column. If you have included a column for Held, any contacts with a value of 1 will be uploaded as held. If you have included a column of Suppress, any contacts with a value of 1 will be uploaded as suppressed



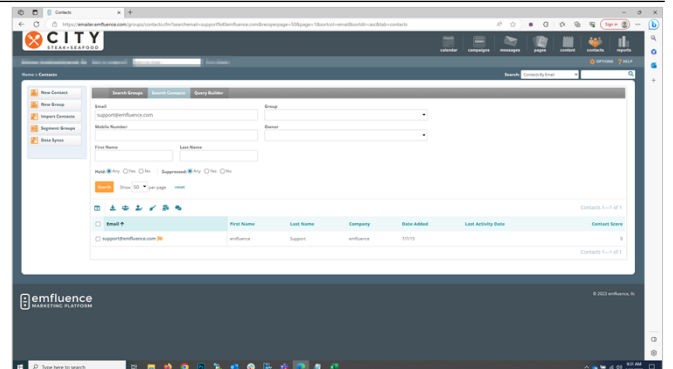
Click on the button **Import Contacts**



Confirm by clicking on the button **Yes, Import Contacts**

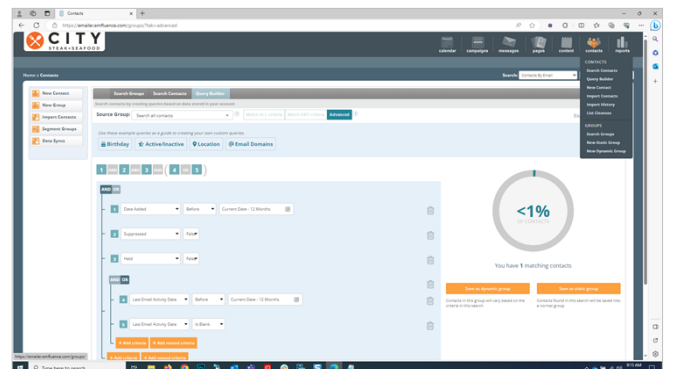


If you search for a contact, you should see the appropriate flag listed on their record



2.3. Query Builder

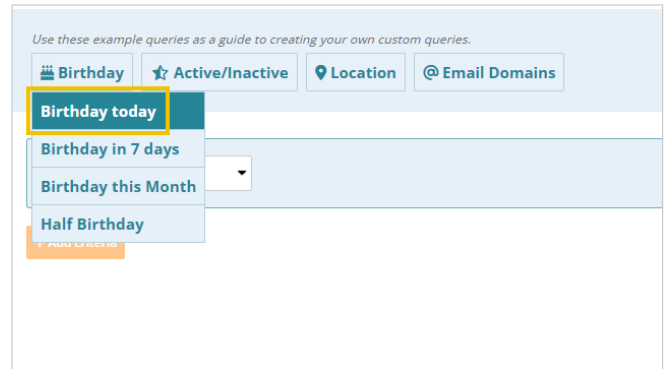
Available within the Contacts section of the emfluence Marketing Platform, Query Builder is emfluence's advanced search allowing you to query contacts based on data saved on their contact record.



emfluence Help Section

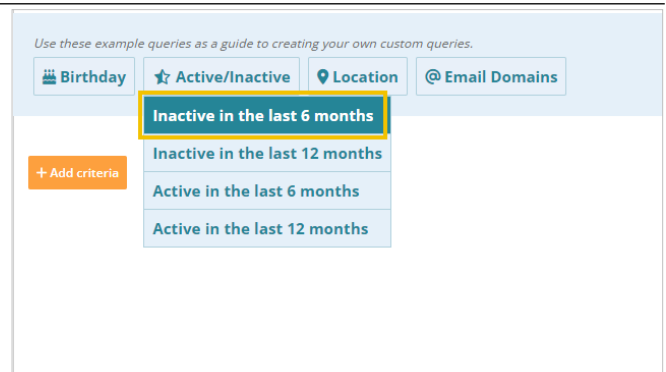
emfluence provides several example queries to get you started. The **Birthday** queries include **Birthday today**, **Birthday in 7 days**, **Birthday this Month**, and **Half-Birthday**.

Once chosen, the query will be created for you, but you still have the ability to edit aspects of the query (make it Birthday in 3 days, for example).



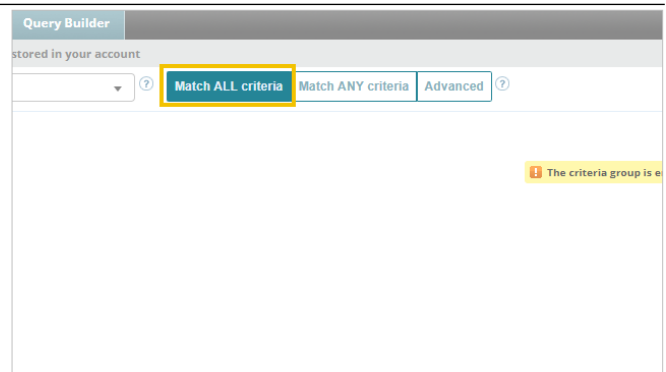
Another set of example queries involve the activity or inactivity of your contacts over 6 or 12 months. Here you can find lists of your active and inactive contacts.

Once chosen, the query will be created for you, but you still have the ability to edit aspects of the query (make it Inactive in the last 8 months, for example).



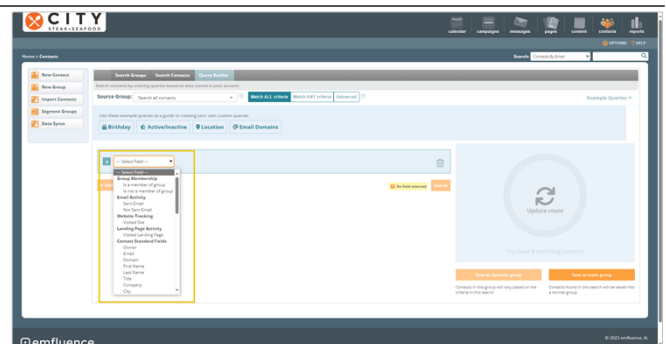
When making queries, you can choose the logic you want your search to follow.

Click on the label **Match ALL criteria** will match all criteria (A and B and C) in your search. **Match ANY** criteria will match any one piece of data (A or B or C), and **Advanced** allows you to create nested queries using both AND and OR operators.

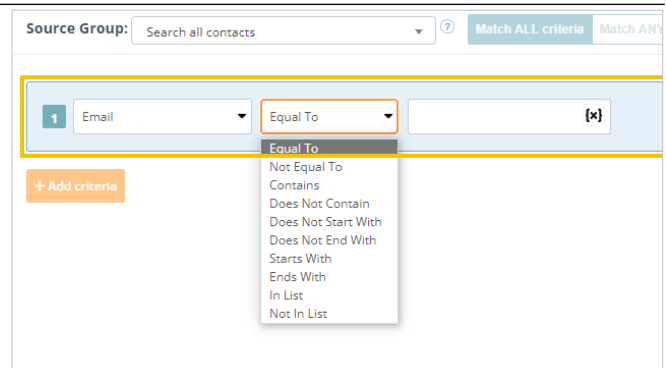


To create your own query from scratch, click on **Add criteria** and choose a field from the Select Field dropdown. Fields available will include all standard and custom fields, group membership, website tracking, and also landing page and email activity.

At the top of the page you can also choose a **Source Group**, which would limit all results from your query to only contacts in that group.



Next, choose your operator. Operator values are different depending on the field chosen (for example, date fields options will be different than numeric fields, etc.). For Email, Landing Page, Website Tracking, and Group membership you will not need to choose an operator.



emfluence Help Section

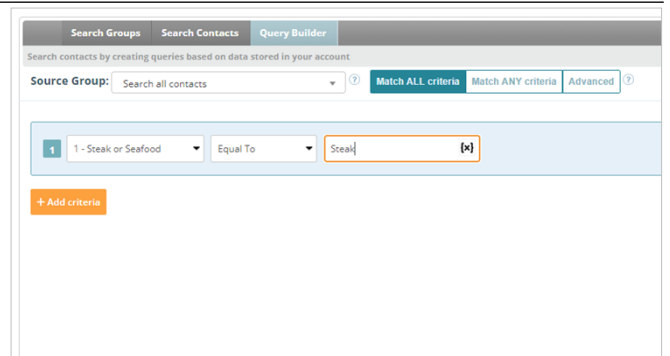
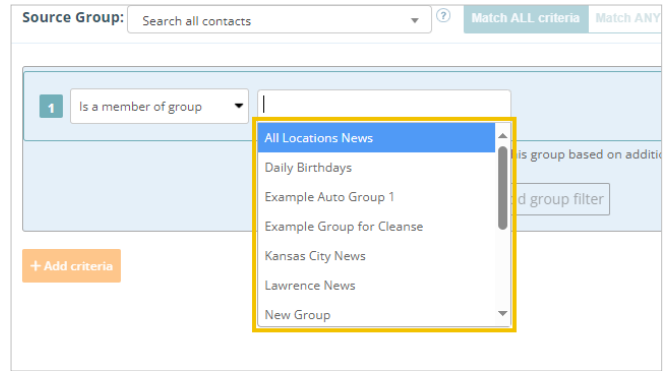
When choosing **Is a member of a group** or **Is not a member of a group**, you can select the group in question from the dropdown.

When choose **Sent Email** or **Not Sent Email**, you can select the email in question from the dropdown.

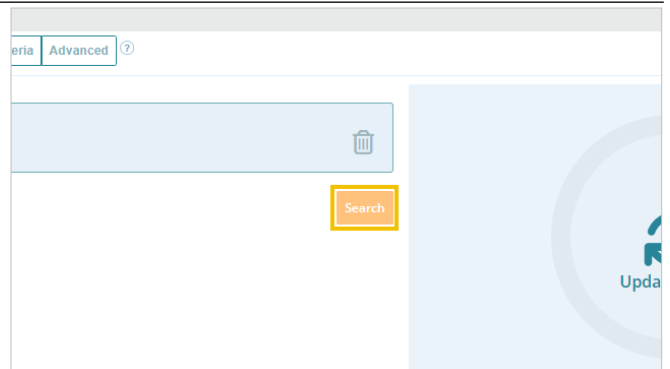
When choosing **Landing Page**, pick the landing page in question from the dropdown.

When choosing **Website Tracking**, select the domain previously connected and then the page in question.

Finally, on contact field queries, choose the value you want your query to match.

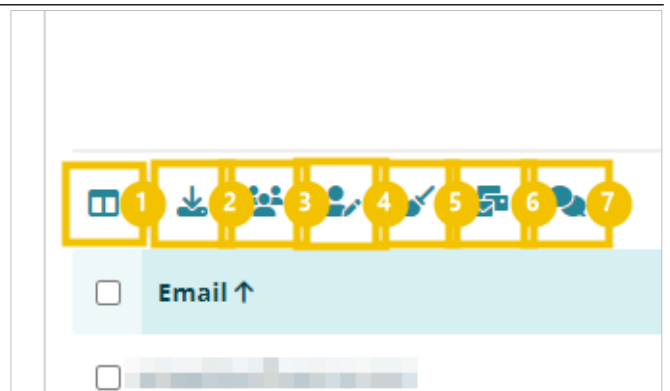


Click on **Search** to see your results loaded at the bottom of the page.

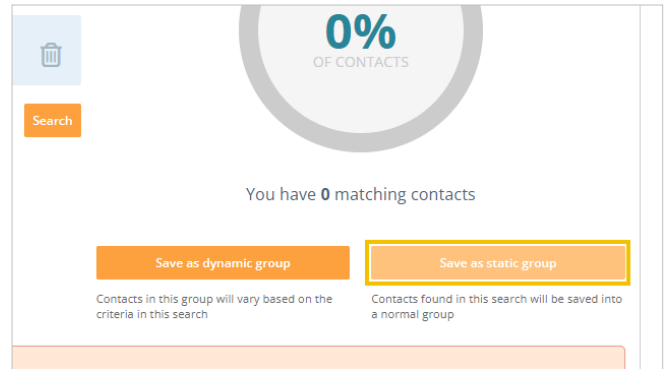


You can use the menu just above your results to take action on these contacts.

1. **Show/Hide Columns:** Choose which data fields you want displayed on the page.
2. **Download:** Download your results. When downloading you will also be prompted to choose which columns you wish to include.
3. **Group Management:** Add or remove contact results to any emfluence group.
4. **Bulk Update:** Bulk update contact results.
5. **List Cleanse:** Run a list cleanse on your results.
6. **Queue for Email:** Queue contact results for existing automated email.
7. **Queue for SMS:** Queue contact results for existing automated SMS.

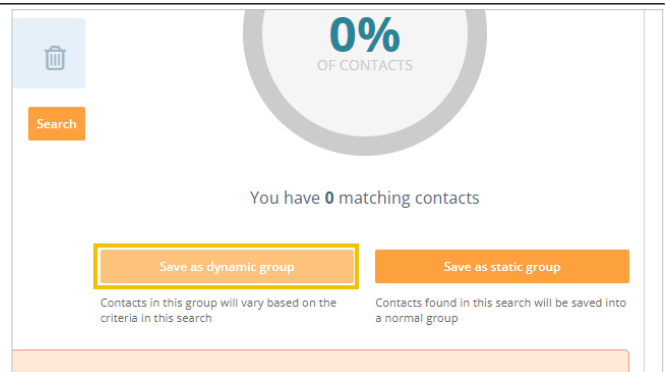


If you want to save your search results for later action, you have a couple of options. Clicking **Save as static group** will save the current list of contacts you see below (meaning the contacts who matched your query when you originally ran it).



For example, if your query on October 1st was to find everyone whose birthday was today, the static group you would save would be full of those October 1st birthdays from your initial query. Your group membership would not change tomorrow. The contacts in the group on October 1st would be the same on October 2nd.

Alternatively, if you click **Save as dynamic group** you will not save this group of contacts but instead save the query itself.



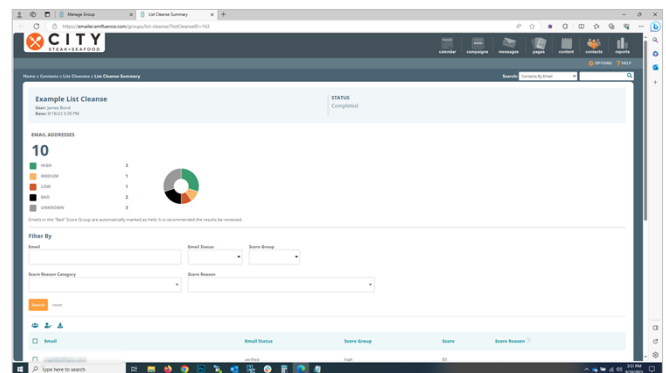
For example, if your query was find all your contacts whose birthday is today, every time that query runs it will load an entirely new group of contacts into the group who now match the query. The contacts in the group on October 1st, for example, would be different from the contacts in the group on October 2nd.

If you need to save your list for a one-time send, pick a static group. If you are planning to use this group ongoing, possibly tying it to a birthday or repermission workflow which you want contacts to get included on automatically, then in that case you would want to save a dynamic group.

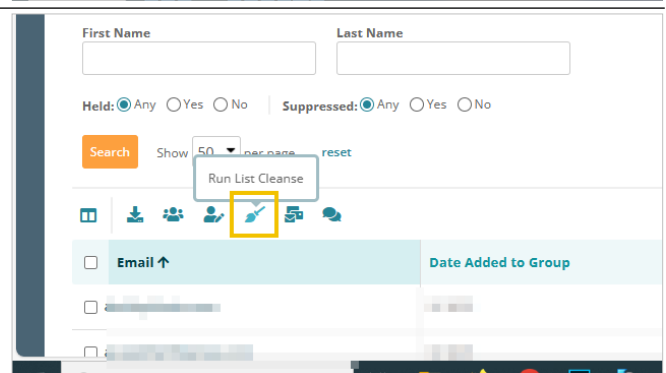
Reminder: You can never manually add someone to a dynamic group. The closest you could come would be to change their contact information to match the query criteria.

2.4. List Cleanse

Through the use of a third-party service, you can cleanse a list of addresses to weed out bad and/or dangerous email addresses from your sends. emfluence suggests cleansing any older lists prior to sending, and doing a regular cleanse of your entire list once or twice a year.

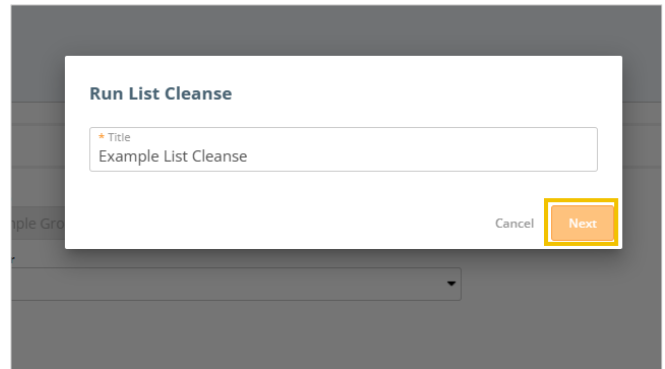


To begin a cleanse, go into the group you wish to run a cleanse on. Above your list of contacts, click on the broom icon to run the list cleanse.



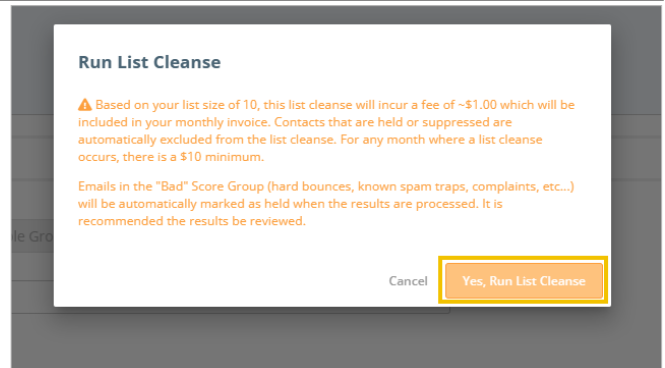
emfluence Help Section

Give your cleanse a title. This not only will help tie the cost of the cleanse to a specific list but will also allow you to differentiate different lists that you have cleansed. Click on **Next**.



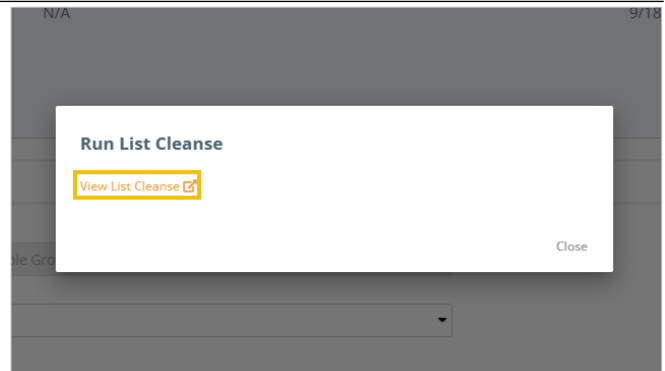
Based on the available count of your list (those contacts neither held nor suppressed), an estimated cost will be shown. To move forward with the list, click on the button **Yes, Run List Cleanse**. If you decide to not run the list, click the Cancel button.

NOTE: There is a minimum \$10 monthly fee for using the cleanse feature. If your cleanses are less than \$10 combined, you will be charged \$10.

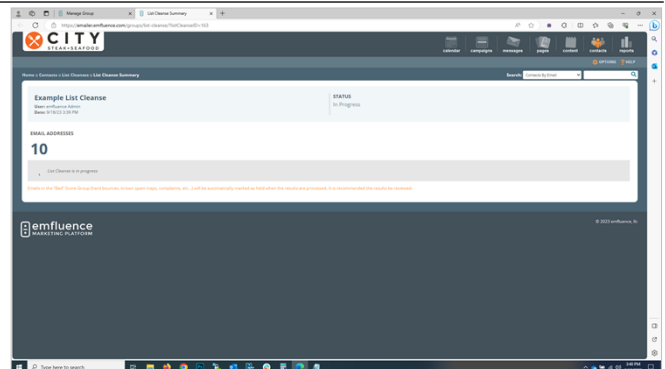


To view your results, click on **View List Cleanse**.

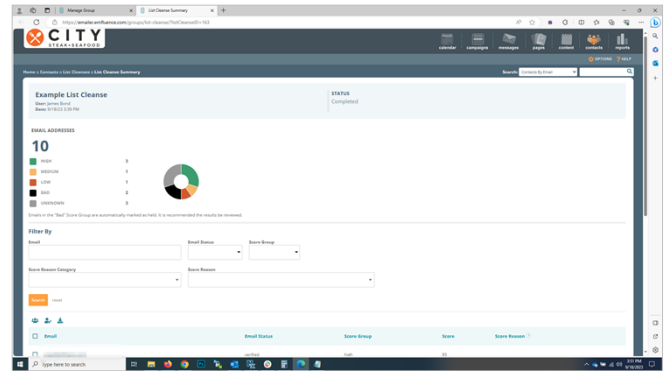
NOTE: Depending on the size and makeup of your list, it may take some time to finish.



While processing, the List Cleanse Summary page will show the cleanse in process.



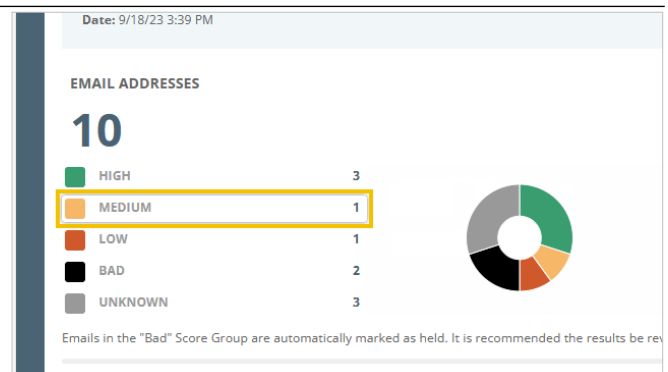
Your results will be scored and displayed in one of several categories. If our provider cannot score a particular email address for any reason it will put it in the Unknown category. Above the list of contacts you will find several filters you can use to filter the results.



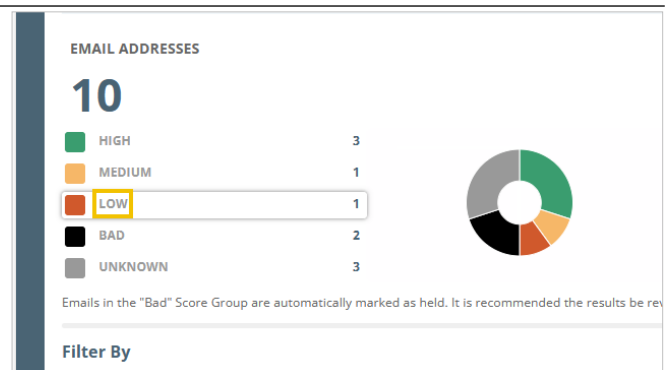
High are the best quality. You can click on the High button to see those results display below, or use the filters to view all High results.



Medium are the next best quality. You may see issues at smaller/private domains. You can click on the Medium button to see those results display below, or use the filters to view all Medium results.

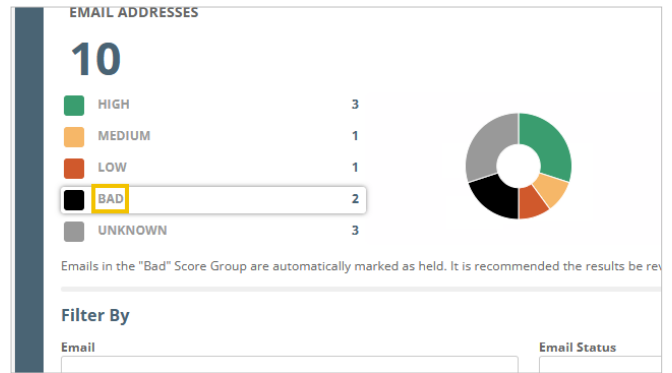


While they are technically valid emails, our provider cautions against sending to **Low** results. Role accounts (such as info, support, sales, etc.) and someone's secondary or tertiary account could be found here. Smaller companies or domains with a smaller footprint can also sometimes be included in the Low category. You can click on the Low button to see those results display below.

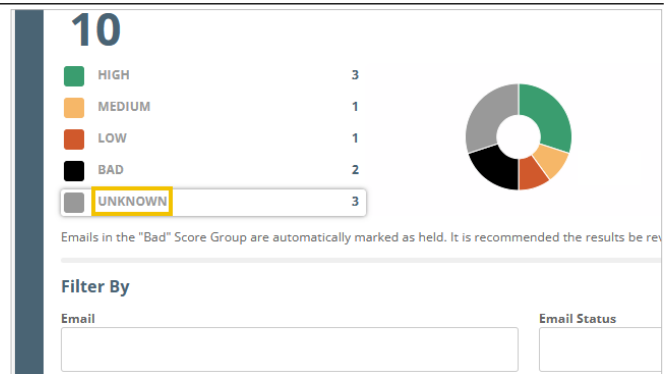


emfluence Help Section

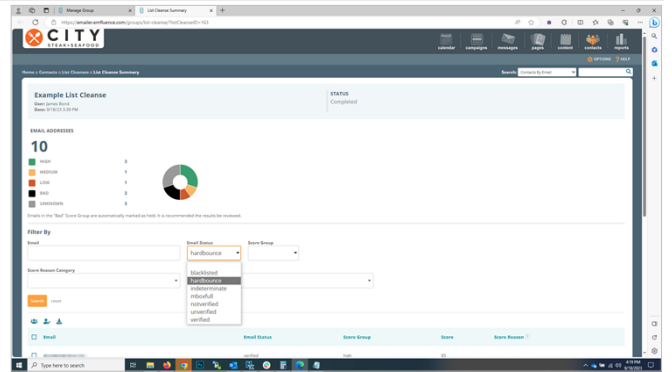
Bad results include addresses that are undeliverable such as those that hard bounced, soft bounced with an error such as mailbox full, or belong to a category of dangerous addresses that could hurt your reputation to send to (spam traps, bots, etc.). Any addresses in the Bad category will be automatically held within your account.



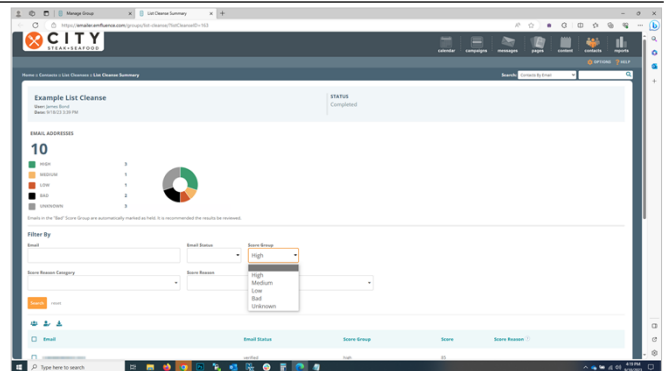
Unknown are addresses, for whatever reason, could neither be verified or confirmed at the time of the cleanse. Our provider cautions against sending to the Unknown category.



The Email Status selector allows you to look for different types of results such as blacklisted (i.e. dangerous), verified, etc.

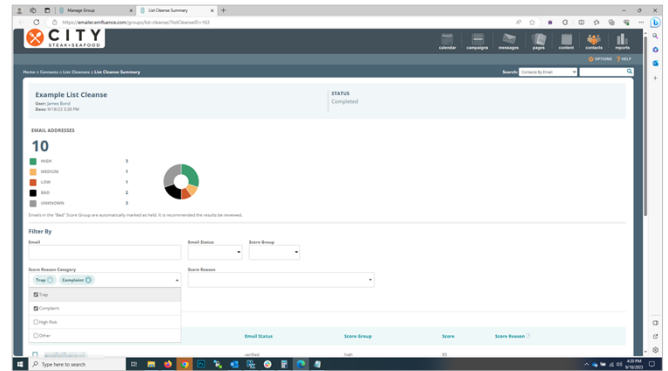


The Score Group filter narrows your results to one of the scored buckets. This is the same filter which is applied by clicking on the links above.

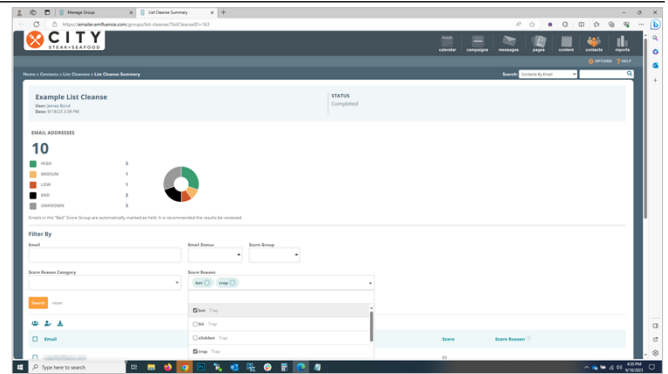


emfluence Help Section

Using the Score Reason Category dropdown, you can filter different type of blacklisting types such as high risk, trap, and complaint.

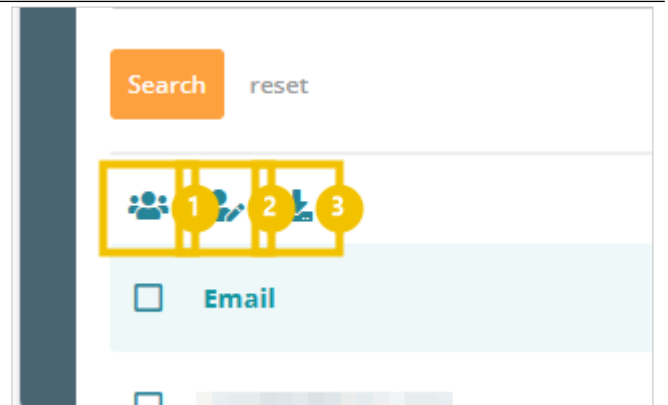


Under Score Reason, you can narrow your filtering to specific types of results such as bots, moles, seeds, traps, etc. The full list of score reasons can be found in the emfluence Help Section.



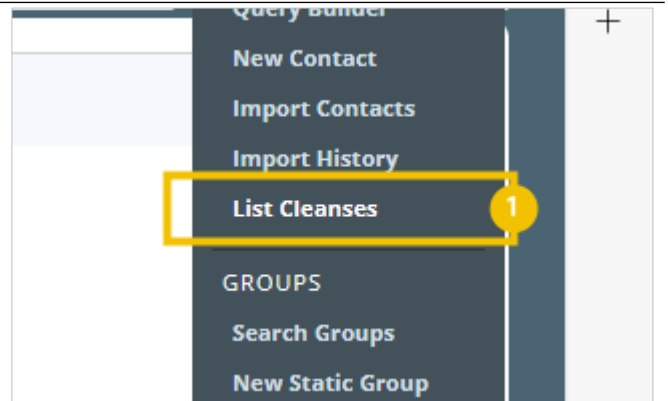
Under the filters, you can take action on the selected contacts.

1. **Add to Group:** Add the selected contacts to a group within emfluence.
2. **Bulk Update:** Bulk Update a value on the selected contacts.
3. **Download:** Download a list of the selected contacts.

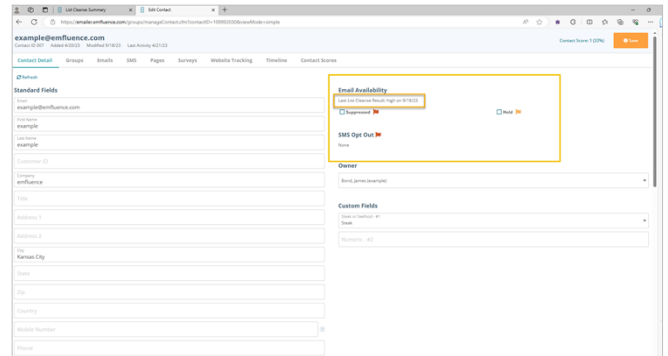


Previously run lists can be found in the Contacts menu dropdown under List Cleanses.

1. **List Cleanses:** View and search previously run list cleanses.

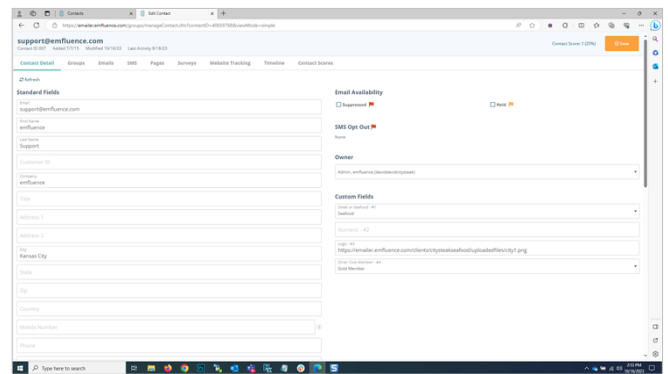


Contact records which have been cleansed will display the last cleanse date just above the Suppressed and Held status under Email Deliverability.

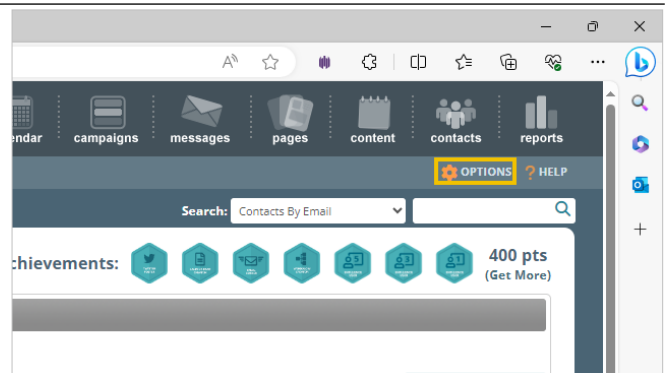


2.5. Custom Fields

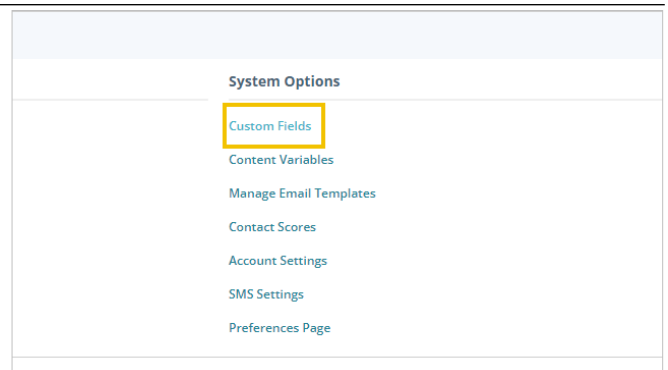
Contact data is saved on the contact record. Contact details, such as standard fields (emails, first name, last name, city, state, etc.) are premade in every account. For any data point you have that doesn't have a corresponding field, you can create a custom field. Once created, data can be saved on that field.



To edit existing custom fields and create new fields, click on **OPTIONS**.

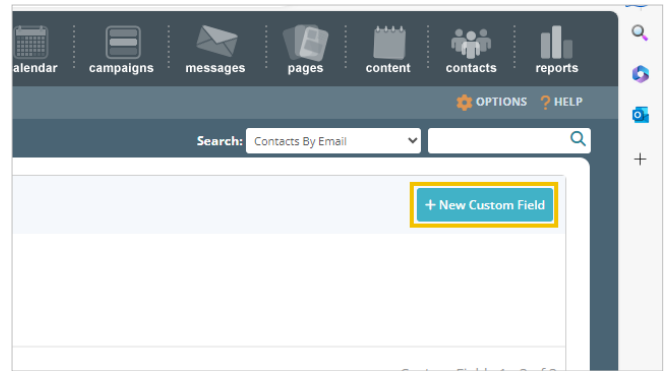


In the middle column, under **System Options**, find and click on **Custom Fields**.

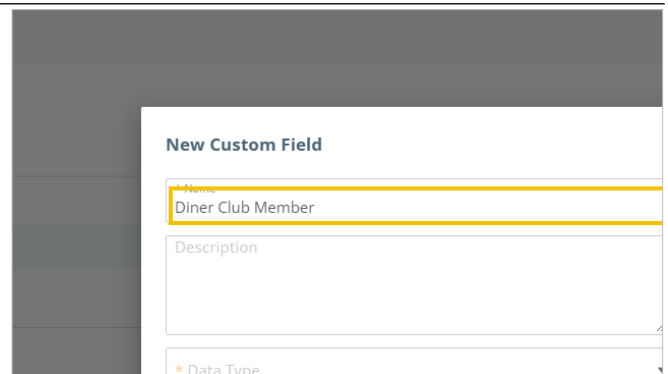


emfluence Help Section

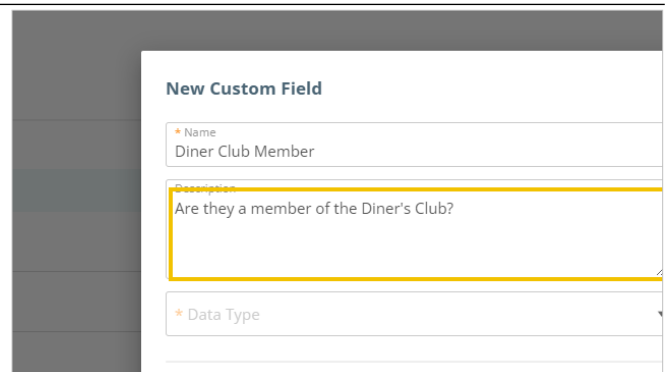
To create a new custom field, click on **New Custom Field**.



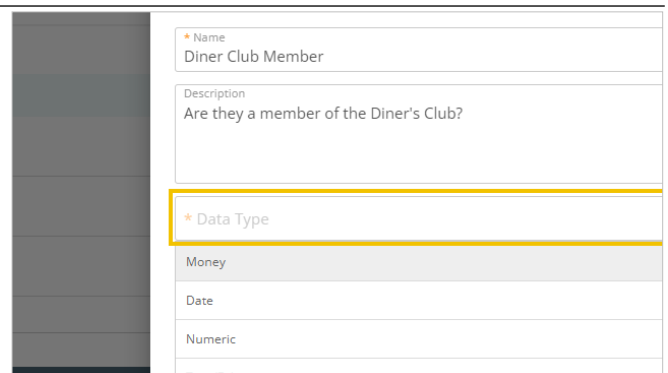
Give your new field a name. You will be able to edit the name of your field later if you wish.



You can add a description for your field to provide more information about how you are using the field in emfluence to your team's other users. Descriptions are not required.

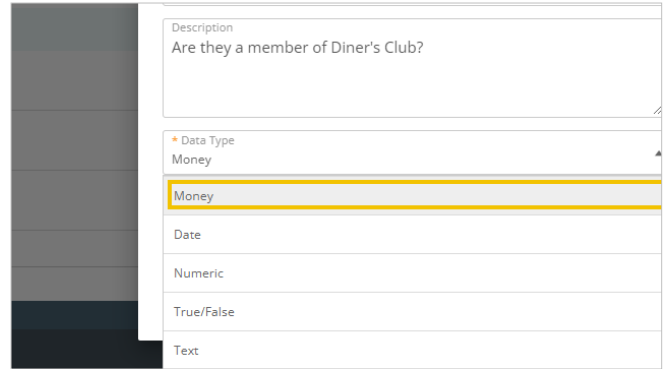


Choose the **Data Type**. Data can be stored in several different types. While you do have the ability to change the data type at a later date, doing so will wipe all values saved for that field in emfluence so it is not recommended.

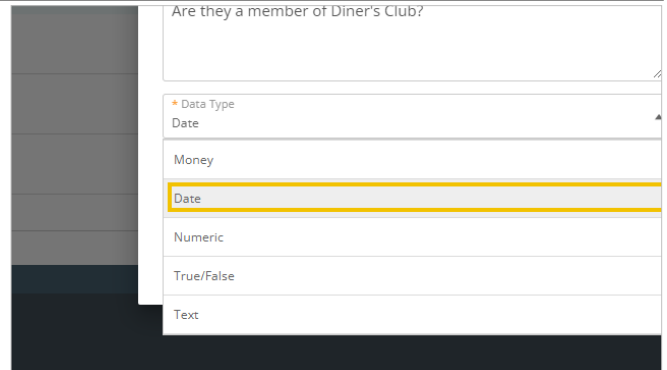


emfluence Help Section

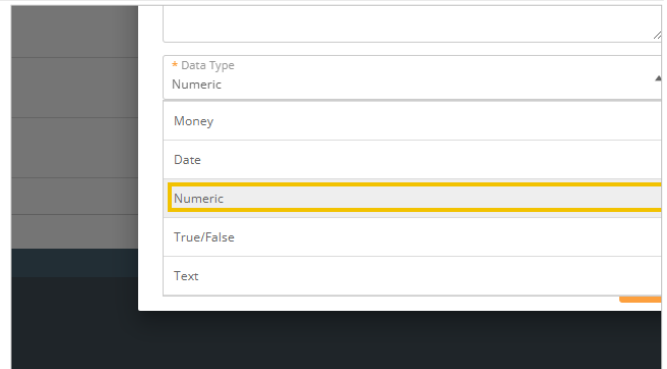
The **Money** field is a numeric field with a decimal place two places in. To allow for different type of currency, the field does not include a dollar sign, pound sign, etc. When using this field as a variable in an email, remember to add the appropriate monetary sign before the variable.



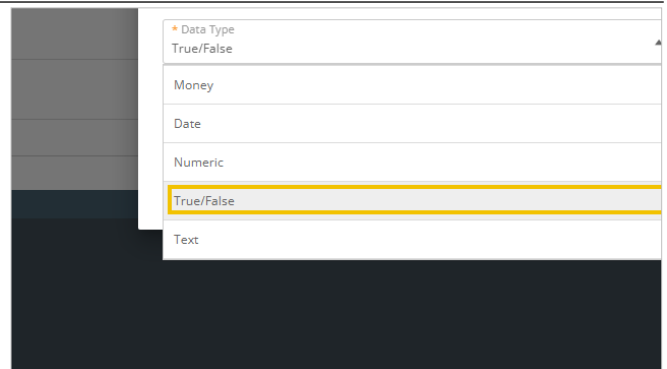
The **Date** field stores data in a standard MM/DD/YYYY format. It will also accept M/D/YYYY or YYYY/MM/DD values. A date field will not accept a time stamp along with the date. It is a date field only.



The **Numeric** field will accept any numeric value up to 14 characters. When choosing a numeric field, you can choose to include a decimal.
NOTE: If you are saving an alphanumeric ID or an ID that includes dashed values, you would want to save as a text field rather than a numeric field. A numeric field will only accept numbers.

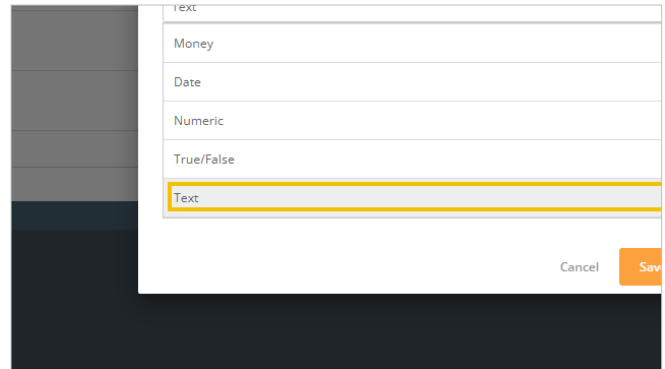


The **True/False** field is a Boolean field that will accept values of True, False, 1, and 0.

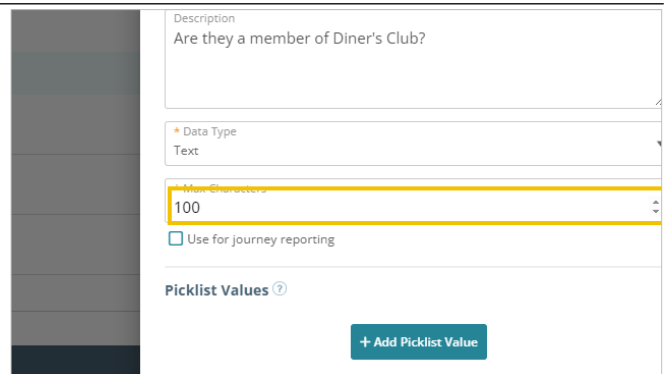


emfluence Help Section

The most common type of field is a **Text** field. A text field will accept any Western character.

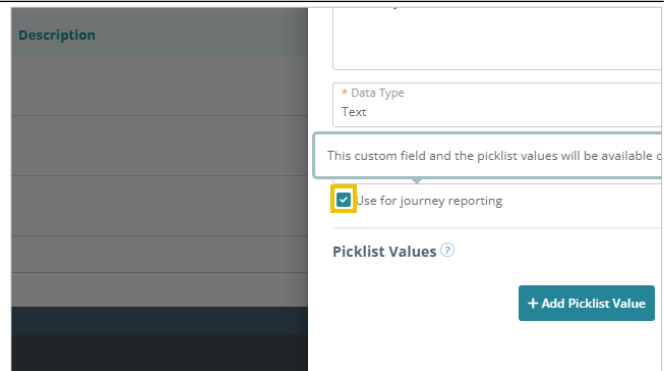


When creating a text field you will need to choose a max character count. By default, 100 characters is chosen. You can expand this up to a maximum of 1,000 characters. No value larger than that can be saved in a custom field.



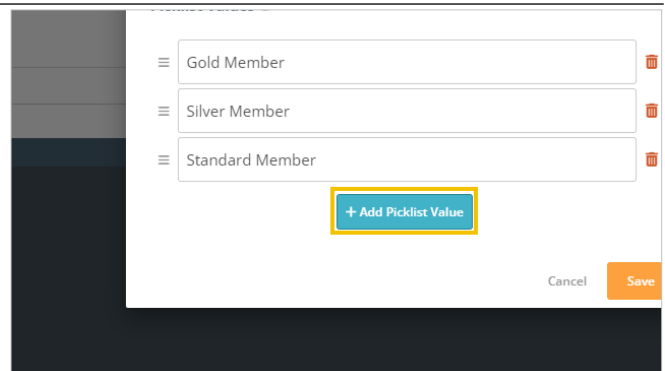
If you wish, text fields can be used in **Journey Reporting**. To enable this, check the box and add at least a single picklist value.

While picklist values are necessary for journey reporting, they are not a requirement for all text fields. Text fields without a set of picklist values will allow any value, so long as it isn't over the max character count, to be saved in the text field.



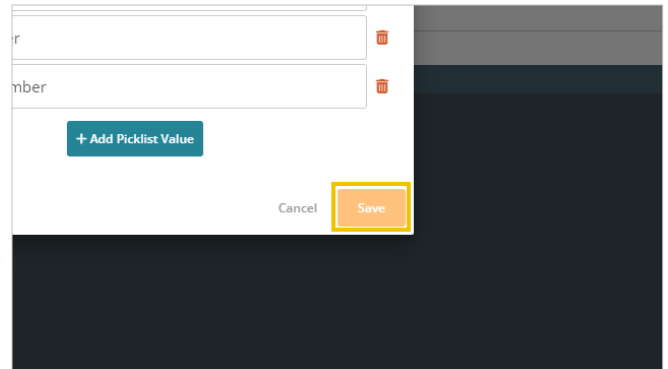
Picklist Values limit what data can be saved in this field to exact values listed here. Attempts to save a different value to this field will fail.

Picklist Values can be used to enable Journey Reporting which is visible on the home page dashboard. They may also be in place to limit entries to this field to a very specific set of values.

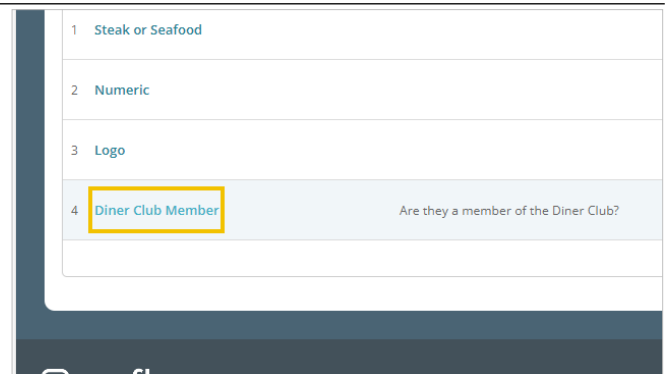


emfluence Help Section

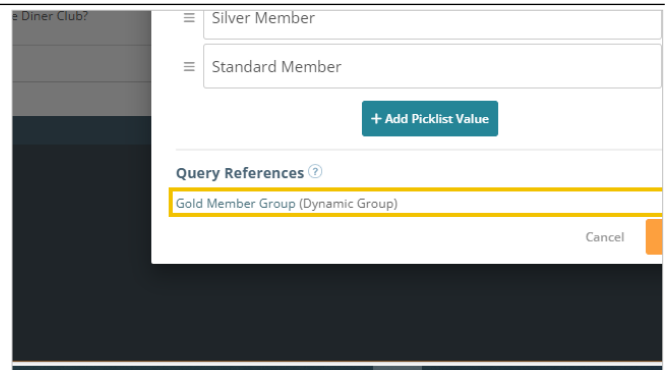
After you have finished creating your custom field, click to **Save**.



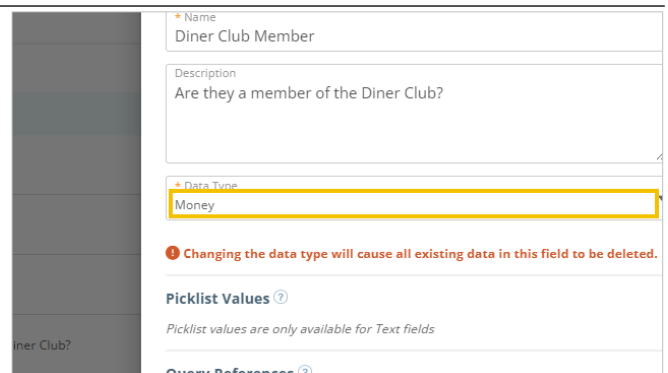
To edit a custom field, click on the field's name. This will launch the same pop-up used when creating a field.



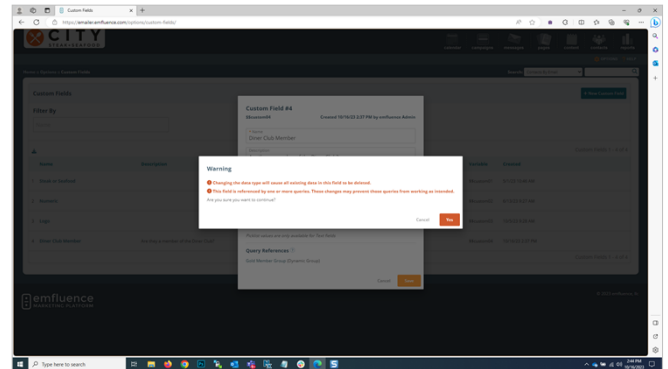
At the bottom of the field, under **Query References**, you will see any saved queries making use of this custom field. These could be in dynamic groups, workflow decisions, or in exit conditions of a workflow. You can click on any result in this section to be taken to that query.



While you can edit any part of the custom field including name, description, data type, text max characters, and picklist values, some changes such as changing the data type would require emfluence to reset all saved values in that field to blank as currently saved values would be improperly coded to be resaved as a different data type. Before attempting to do this, we would suggest downloading your contacts with all values included.



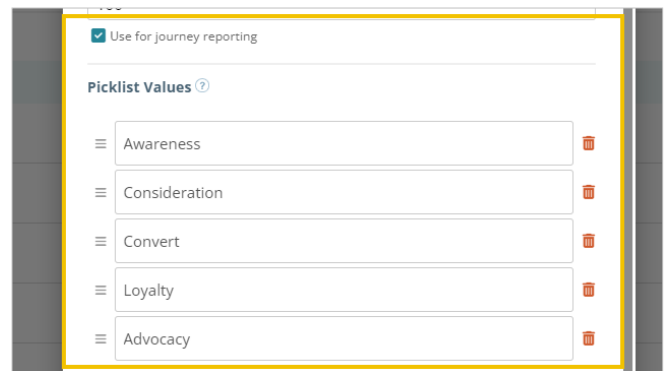
If you choose to overwrite values on your custom field, and click save, you will get a secondary warning letting you know if any queries could potentially be broken by this change and that any saved values in this field will be wiped out. There is no undo button, so just be certain you are ready before proceeding.



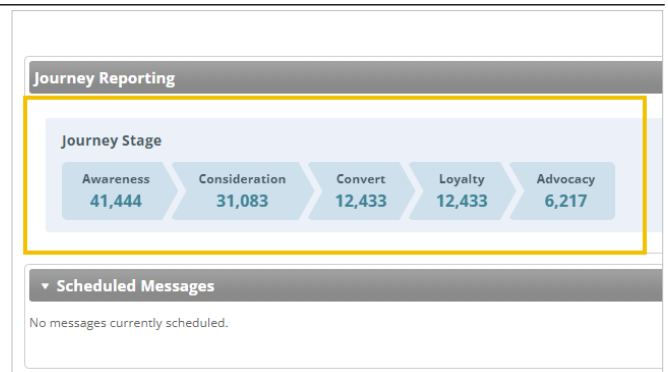
2.6. Journey Stage

Through saving a set value on a **Custom Field** in emfluence, you can track each of your contacts' customer journey from Awareness through Advocacy.

Simply create your custom field with preset picklist values and remember to check the box to use the field for **Journey Reporting**. Then assign the proper value to each contact, creating subsets of your list you can use within emfluence.

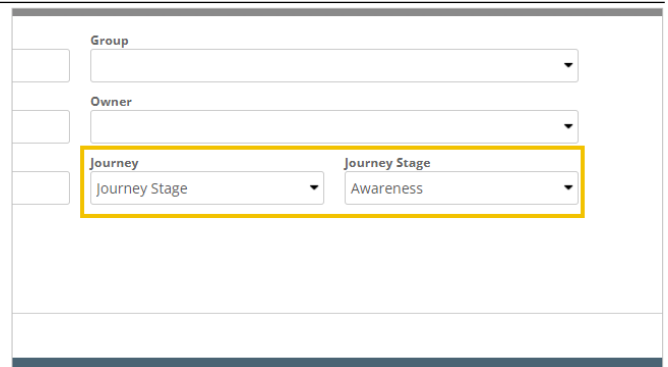


On the home page, if **Journey Reporting** has been enabled for any field, you will see the chart displayed with the breakdown of how many contacts appear in each stage. As with any of the charts on the home page, you can move it up or down in your list through the Options button at the bottom of the page.

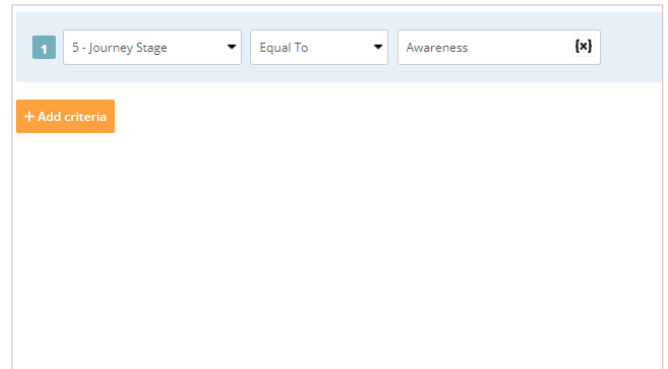


You can click on any of the stages to advance to the Search Contacts page with a list of those contacts in that page displayed.

You can also do a manual search by using the **Journey** and **Journey Stage** filters on the Search Contacts page to search for contacts in specific stages.



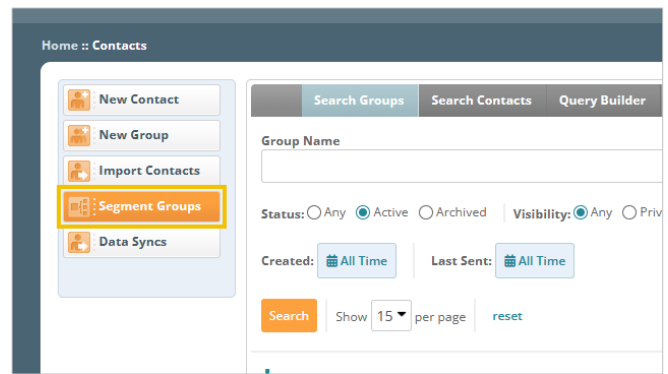
If you choose, you could also make use of **Query Builder** to search and create **Dynamic Groups** for each of your stages to make it easy to market to each subset quickly.



2.7. Segment Groups

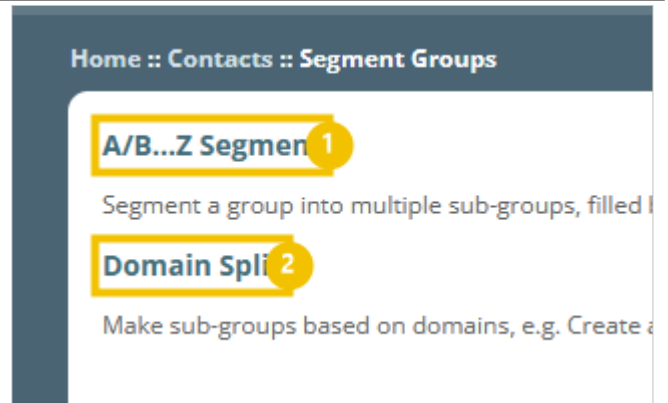
Before proceeding, you might want to check out emfluence's A/B Testing (available to randomly split your list within the email) and decide if it fits your segmentation needs.

If A/B Testing does not cover your use case (for example, you need your emails to go out on different days or different times), you can manually segment a group in the Groups Section by clicking on **Segment Groups**.

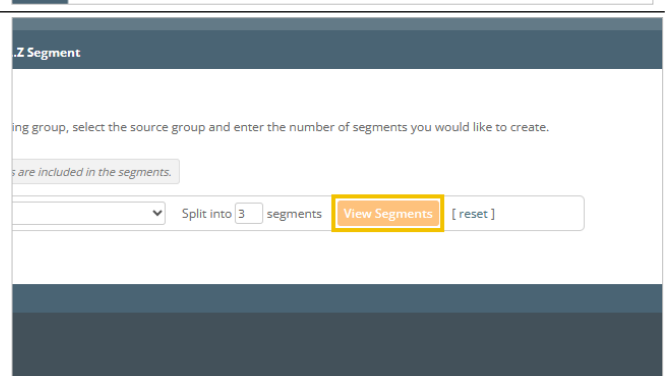


For your segmentation, you can either choose a random A/B split or choose a Domain split.

1. **A/B...Z Segment:** Randomly split an existing starting group into separate segments.
2. **Domain Split:** Make segments based on domains.

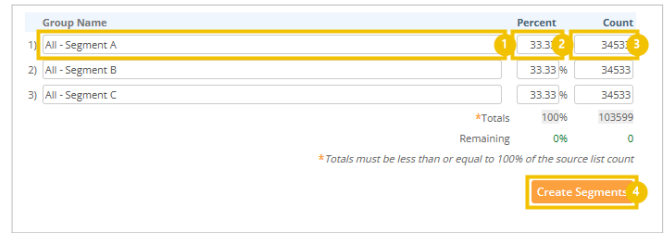


To create an A/B Split, choose your starting group from the dropdown and then type the number of random segments you wish to create. Each segment will be created as a separate emfluence group. When finished, click on **View Segments**.



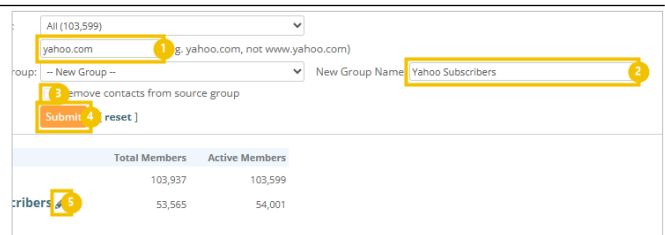
On the next page, you can make changes by editing the group names and counts before saving and creating the groups.

1. **Group Name:** You can edit the name of your groups.
2. **Percent:** You can edit the percentage size of your groups. By design, your groups will be of equal size.
3. **Count:** You can edit the contact number in the groups. By design, your groups will be of equal size.
4. **Create Segments:** Click to save and create your segmented groups.



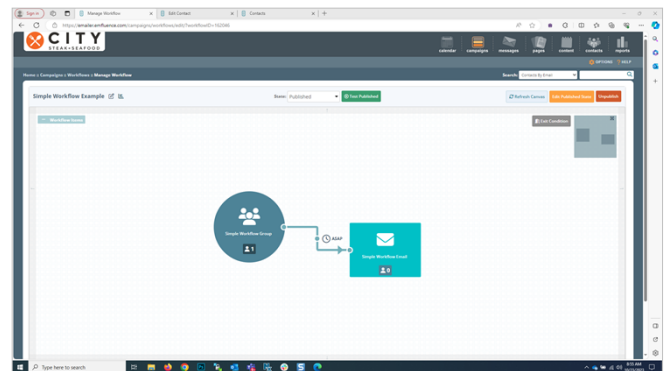
As with A/B Split, in Domain Split you will start by choosing the source group and then make choices on what to do with your results.

1. **Domain:** Choose the domain you wish to create a segment for.
2. **Group:** Either choose a pre-existing group from the Destination Group dropdown or type the name of the new group you wish to create.
3. **Remove contacts from source group:** Optionally, you can remove these contacts from your starting group. If the box is not checked, no changes will be made to the source group.
4. **Submit:** Click Submit to save and create your group. You will find your original group and your segmented group below with contact counts for each.
5. **Group Link:** Click to go to your group.



2.8. Adding Contacts to Workflows

The natural way for contacts to get added to a workflow are to be added to the starting group or fill out a landing page form submission that kicks off a workflow. If your group is a dynamic group, the query itself will decide who gets added. Only contacts matching a dynamic group's query will be added to a dynamic group.



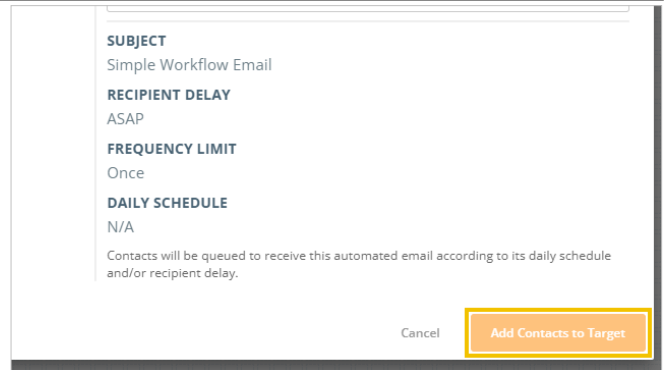
emfluence Help Section

The trigger for adding someone to a workflow is adding them to the starting group. If contacts were already in the group prior to you publishing your workflow, there is no trigger to push contacts into the flow. However, you can click the **Advance** button and advance the contacts to any point within the flow. Contacts added after publication will process naturally.



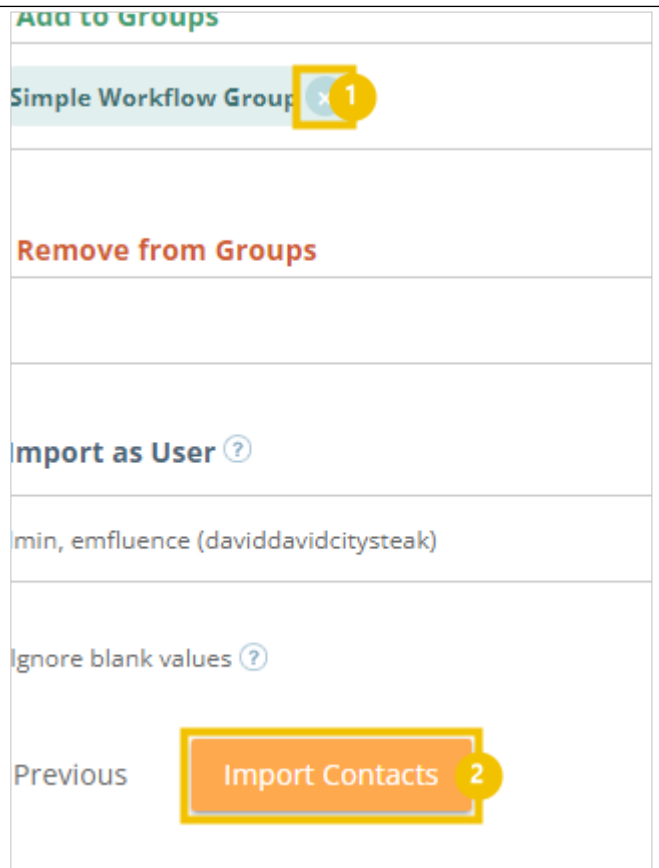
Choose the spot in the workflow you want to add the contacts to and click **Add Contacts to Target**.

NOTE: All contacts in the starting group will be added. If you need to advance only some contacts, rather than the full list, see one of the alternate methods available.



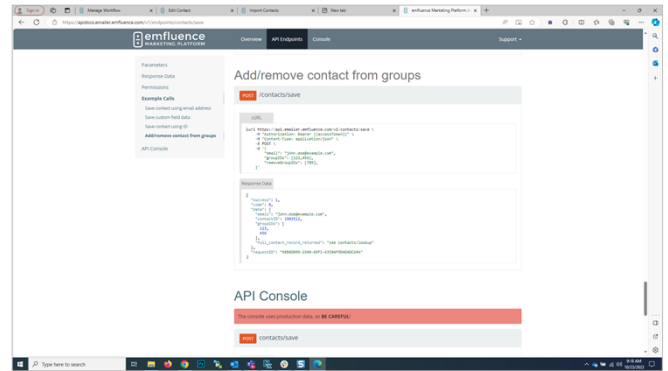
The easiest way to bulk add contacts to a workflow with a starting static group would be by importing a list of contacts and adding them to the group. NOTE: Contacts already in the group cannot be readded without first being removed.

1. **Select Group:** Select the group you wish to add your contacts to.
2. **Import Contacts:** Import your list.

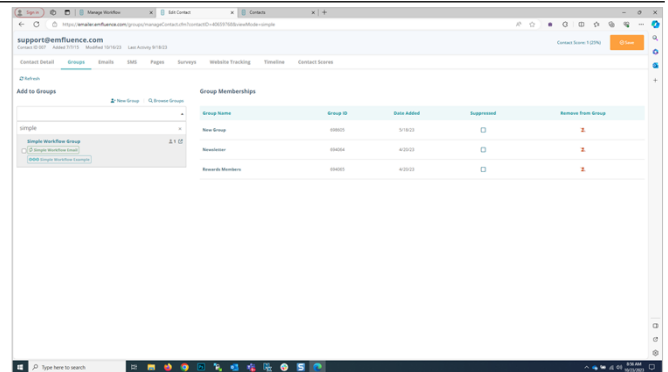


emfluence Help Section

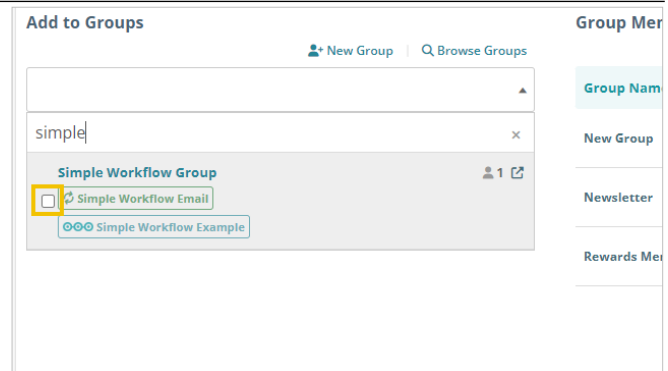
Contacts can also be added to groups through the emfluence API or through a secure FTP data sync.



You can also add contacts to your starting group on the Group tab of a contact record. Use the search, or select Browse Groups, to find the group you wish to add them to.

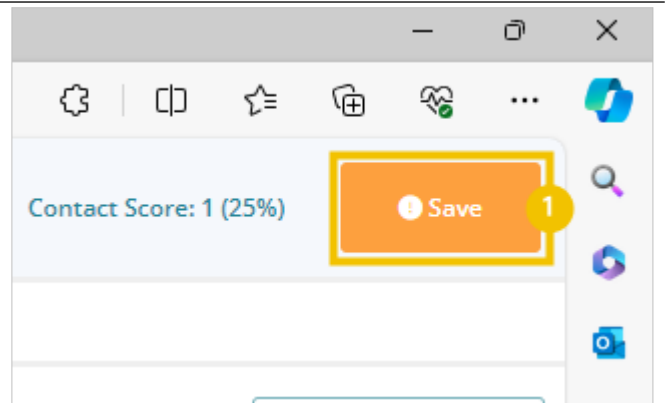


If the group is connected to an automated email and workflow you will see those listed under the group name. Check the box to select that group to add the contact to.



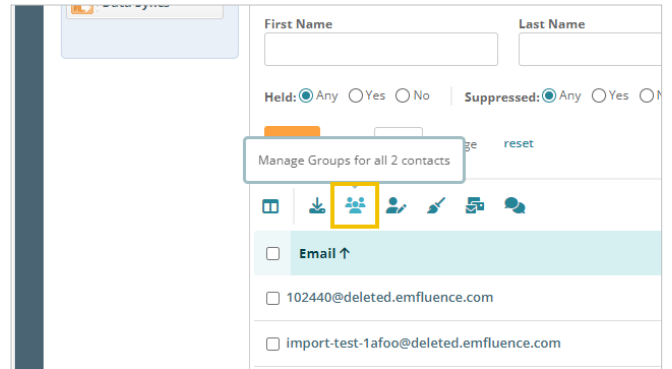
You will see a warning displayed at the top of the contact that they will be added to a workflow.

1. **Save:** Click to save your choice to add the contact to the group.

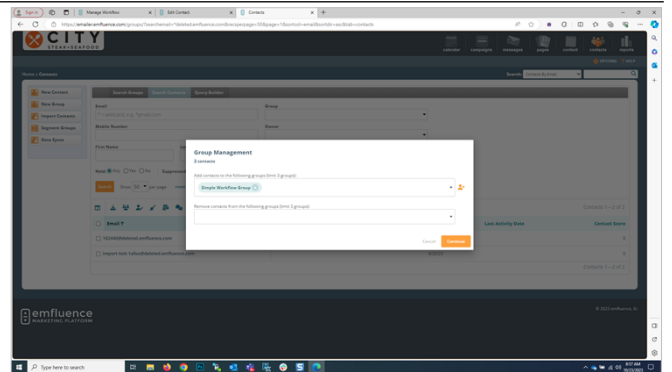


emfluence Help Section

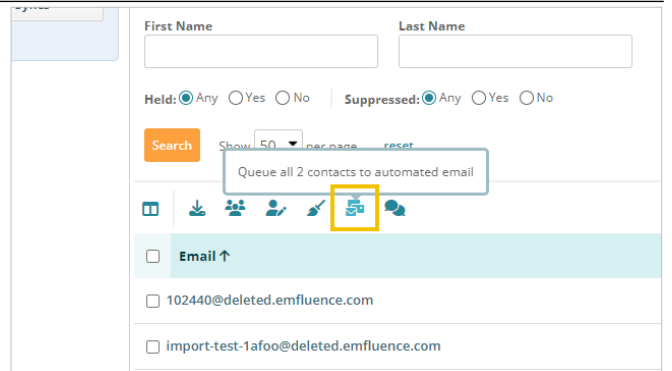
You can also add lists of contacts to groups by clicking the **Manage Groups** button above a list of contacts.



Then use the search to find your group and click Continue to add them to the group.

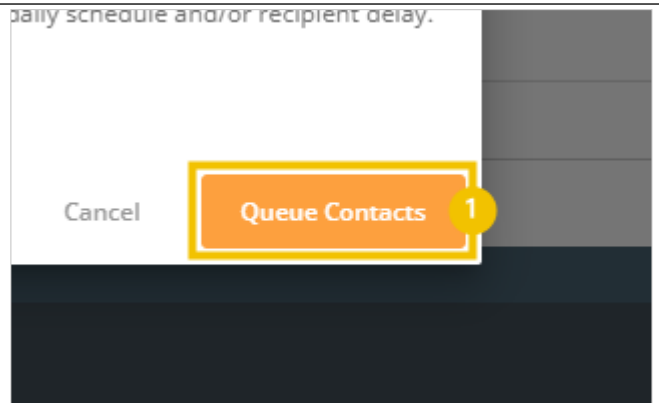


You can also use the **Queue** button to queue a list of contacts to an emfluence automated email (rather than adding them to the group). Click on the button to **Queue all contacts to automated email**.



Find the automated email from the search results.

1. **Queue Contacts:** Click the button to confirm you wish to queue this list of contacts to your automated email.

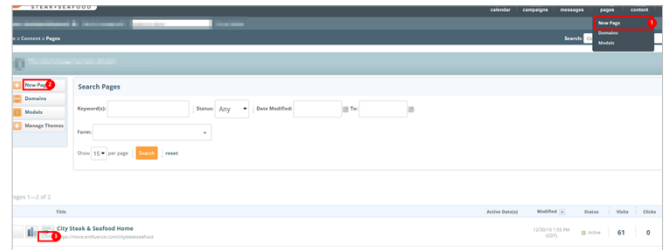


3. Pages

3.1. Create a Landing Page

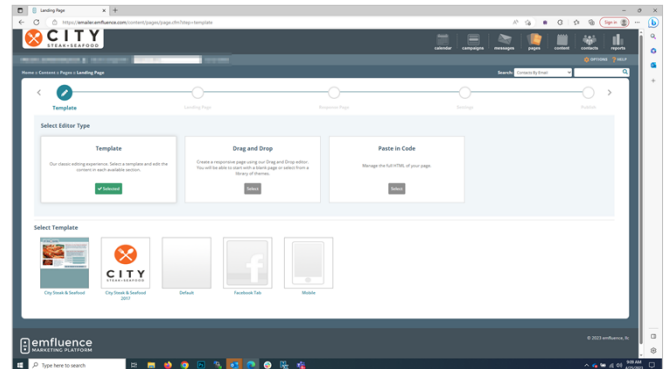
You can create a new page in the Pages section by clicking New Page in the left-sidebar menu, clicking the New Page option in the top navigation dropdown, or using the copy button on an existing page to start with a copy of that page.

1. **New Page:** Create a new page from the top navigation dropdown menu.
2. **New Page:** Create a new page from the left-sidebar navigation.
3. **Copy a Page:** Make a copy of an existing page by using the copy button.

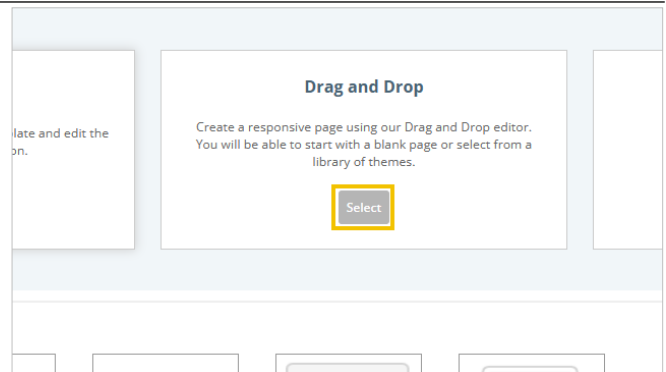


3.1.1. Choose your Page Theme or Template

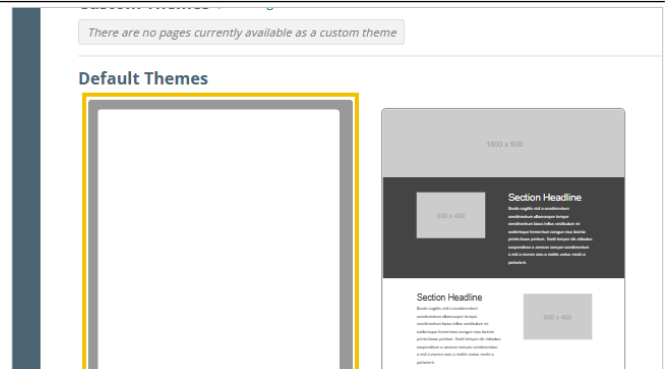
On the next page you can either select an older precoded template or use the Drag & Drop editor to create a page. emfluence has moved away from landing page templates allowing users far more freedom with pages using the Drag & Drop option. Alternatively, if you want to code the page entirely on your own, you can use the Paste in Code option.



Click **Select** to begin making your page in the Drag and Drop editor.



All of your **Page Themes** will load. If you have any custom themes, those will load at the top of the page. Check out the separate section on creating a landing page theme in the emfluence Help Section. Whether you start with a custom theme or a default theme, any changes you make to this page will not affect other pages using that theme. For our choice, we will click on **Blank**.



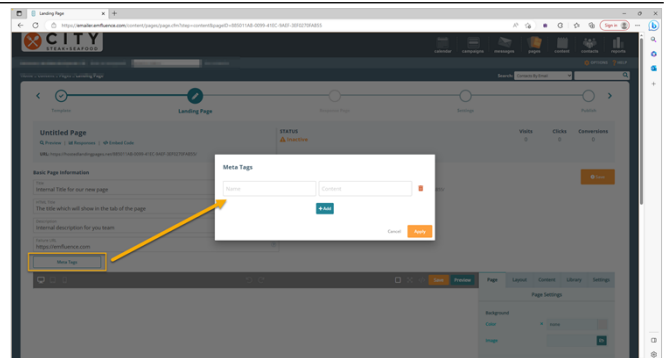
3.1.2. Set Basic Information

Fill in the Basic Page Information.

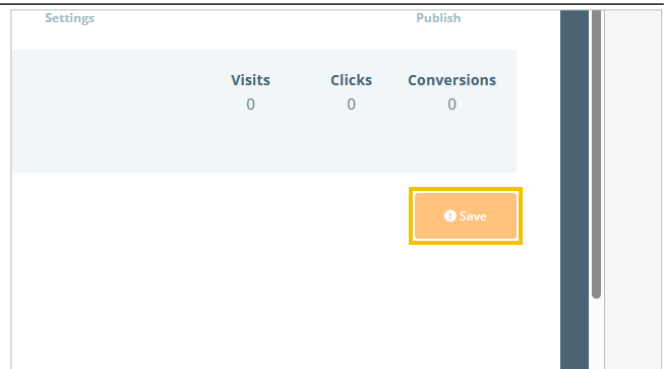
1. **Internal Title for our new page:** Fill in the internal title for the page. This is only found within emfluence and does not show on the published page.
2. **HTML Title:** Your HTML title is what will show up in the tab of the browser when viewing the published page.
3. **Internal description for your team:** This is only found within emfluence and does not show on the published page but can be used to explain the purpose of the page to the rest of your team.
4. **Failure URL:** If your page is ever deactivated and someone visits it, where do you wish to direct them?
5. **Default URL:** By default, emfluence will create a random URL for your page at domains we own. If you wish to use a managed or alternative URL check out those steps in the emfluence Help Section.



If you want to make your page more easily discoverable, you can apply **Meta Tags** to your page. Using meta tags is optional, and you may not wish to use them on all of your pages.

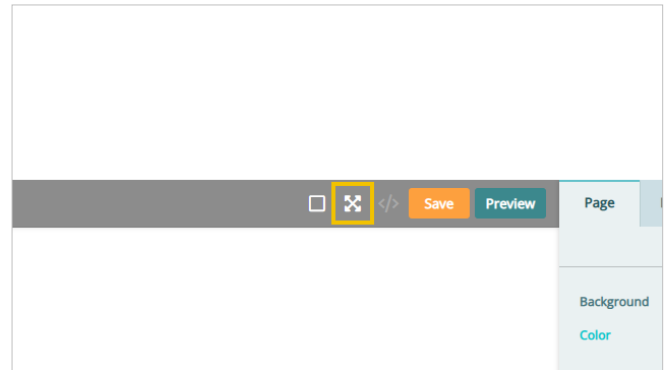


Click **Save** to save the settings on your page.

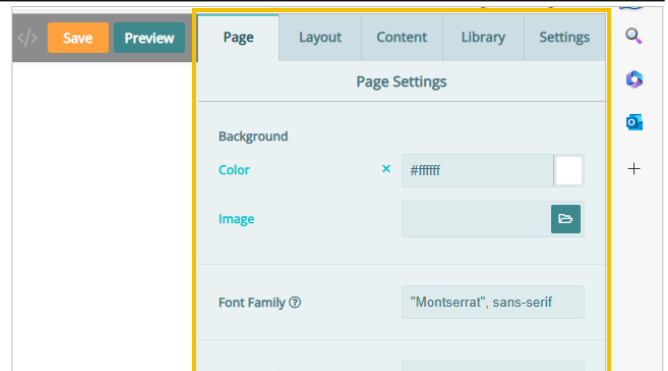


3.1.3. Design Your Page

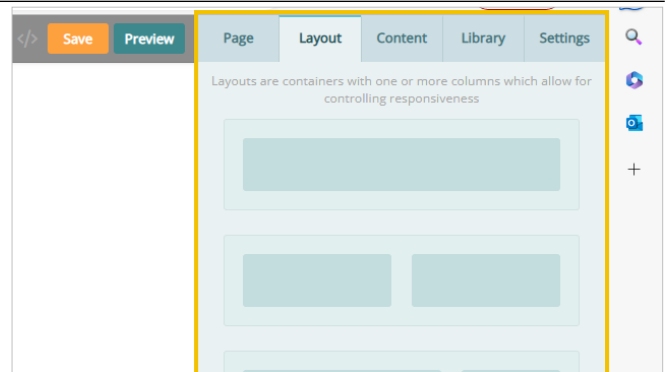
As with the Drag & Drop editor in emails, you can click on **Fullscreen** to expand the compose window to your entire page.



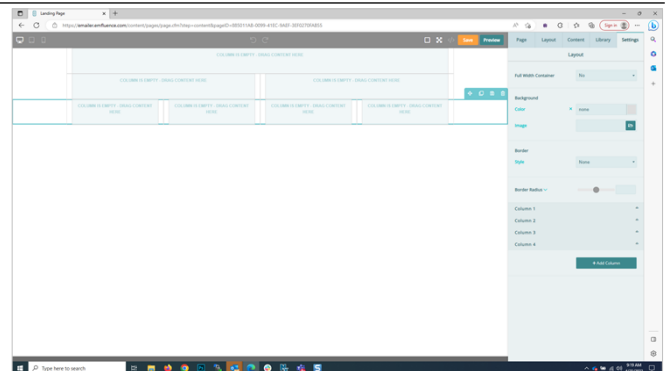
Your settings for your page can be found in the right-sidebar. The **Page** tab allows you to set basic settings for your page including a background color and/or image, a default font family and size, and add additional CSS to the head section of the page. These settings will apply to the entirety of the page, but can still be overwritten in separate sections as you wish.



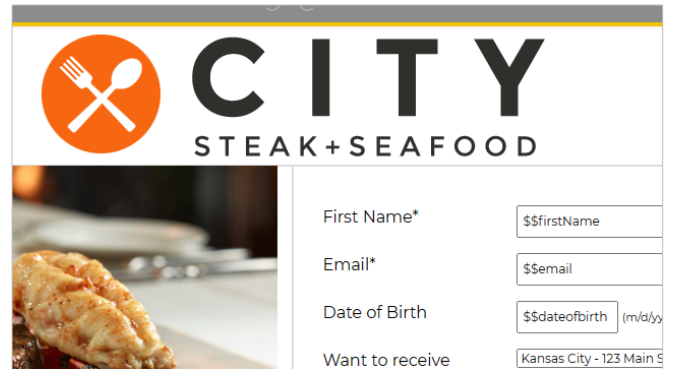
You can drag **Layouts** on to your page to create a wire frame design. If you are making a simple page (for example: a page with a form which may be embedded in a modal) you don't need to use layouts. However, they can be useful by creating additional layers and columns where settings can be applied.



Drag out Layouts to create a wire frame, or structure, for your page. You can then drag out content and library items into the layouts.



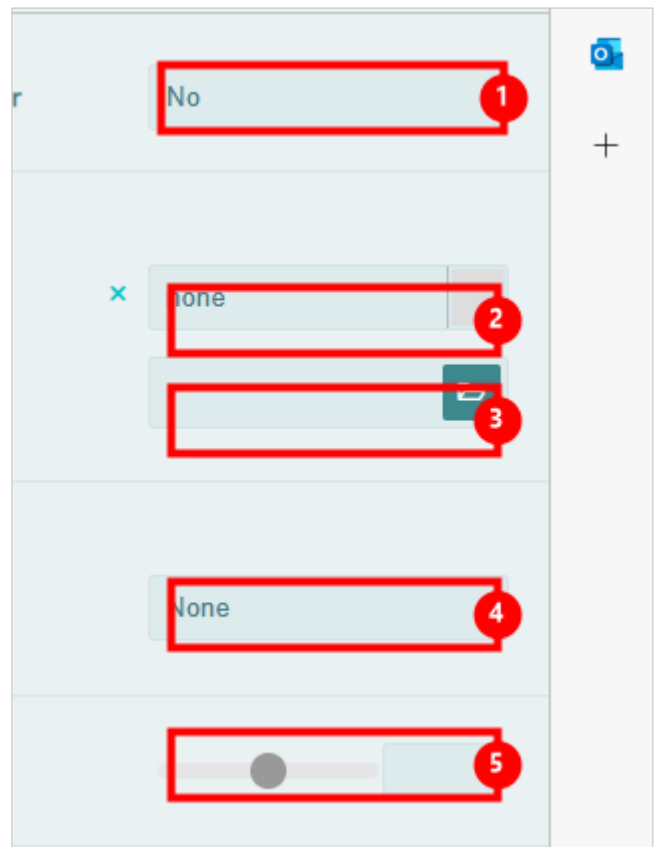
Drag elements into your layouts and edit to fill out your page design. Learn more about individual elements in the emfluence Help section.



3.1.4. Edit Layout Settings

When Layouts are selected, you can set settings for the entire Layout under the Settings tab.

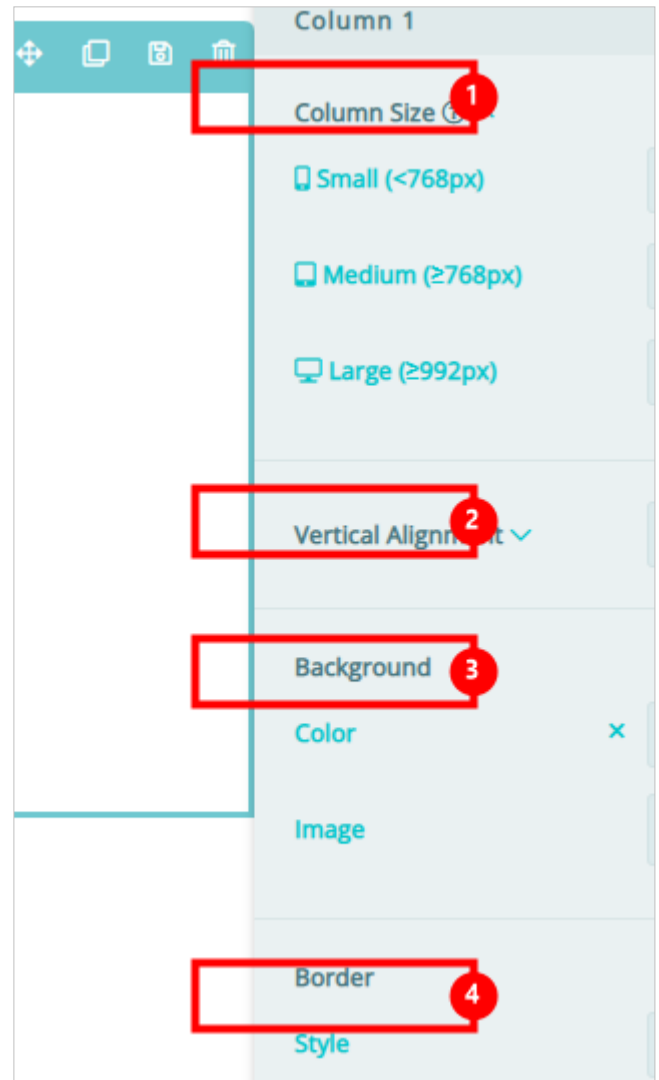
1. **Full Width Container:** By default, your page has margins on both sides, but any layout can be made to expand to the full width of the page by changing this value to yes.
2. **Background Color:** Set a background color across the entire layout. If the layout has multiple columns, this will set the color on all columns.
3. **Background Image:** Set a background image across the entire layout. If the layout has multiple columns, this will apply across all columns.
4. **Border Style:** Set the border style around the layout.
5. **Border Radius:** Set the border radius around the layout. If border style is set to None, no radius will apply.



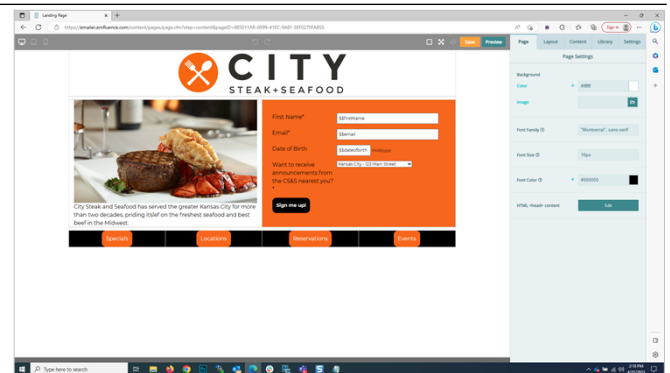
emfluence Help Section

If your Layout has more than one column, you can still apply settings to the entire layout, but you now also have the ability to choose different settings on different columns.

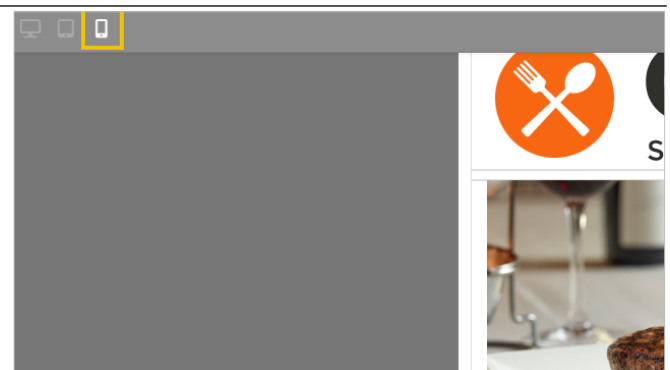
1. **Column Size:** This adjusts the responsiveness of your columns on different sized screens. Responsiveness is applied by default, but you can change the settings on how each column will render (and even hide certain columns on some sizes if you wish).
2. **Vertical Alignment:** By default, your columns will align at the top, however you can choose middle or bottom alignment instead.
3. **Background Color and Image:** Apply background color or a background image to only a single column of the layout (in order to have the columns colored differently).
4. **Border Radius and Style:** Set the border style and border radius for only a single column.



Finish Styling your page.



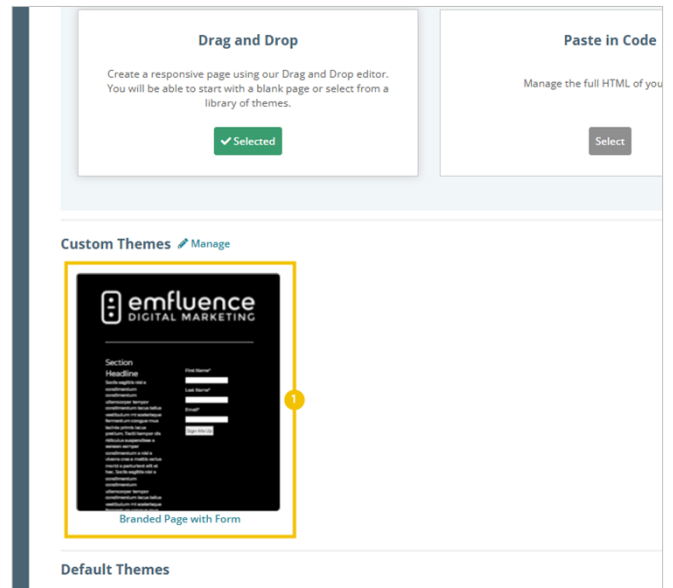
You can use the device settings to test the responsiveness of your page on large, medium, and small devices. You can also use the preview button to preview the page in your browser.



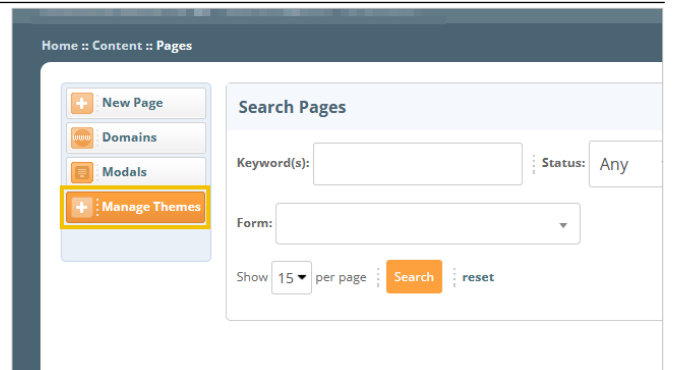
3.2. Create a Page Theme

Any landing page made using the Drag and Drop editor can be saved as a page theme. When creating a new page, you can select that theme as a starting point. Changes made to the new page will not be reflected in the theme, so you can edit as much or as little as needed.

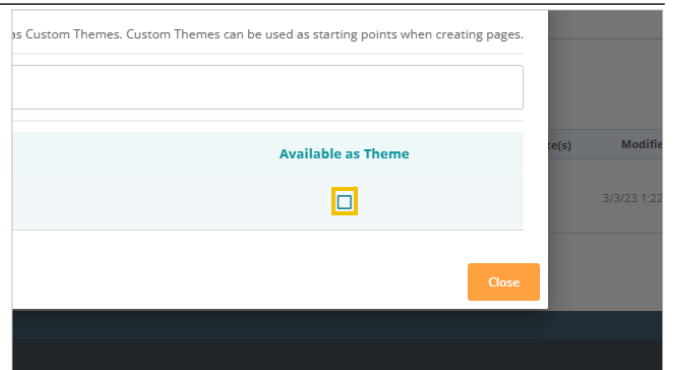
1. Custom Theme:



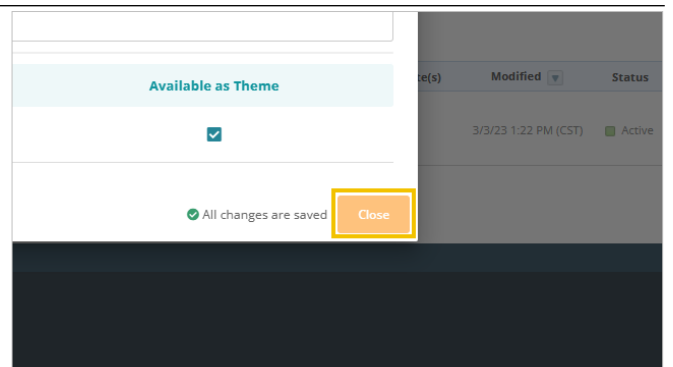
To save a page as a custom theme, first you will need a saved page within the platform. To save that page as a theme, click on the button **Manage Themes**



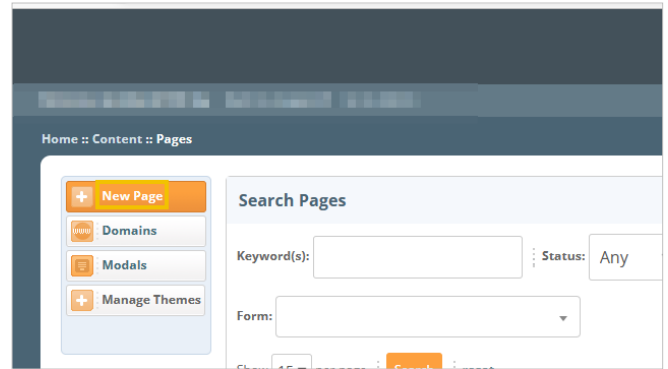
In the pop-up, search for and find the page which you want to make into a custom theme. **Check the box** to make it available



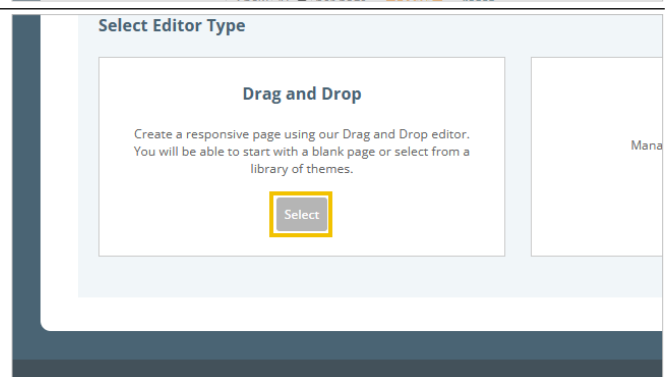
Click on the button **Close**



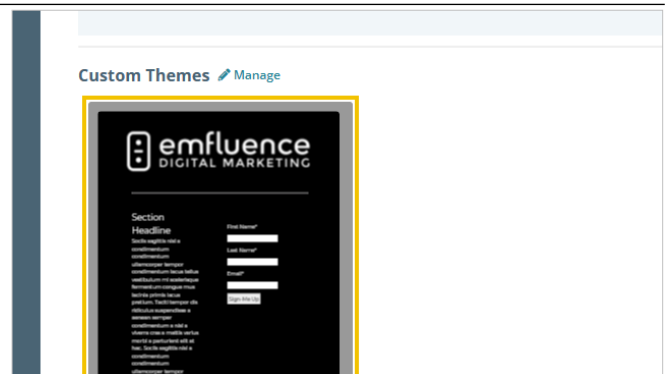
To create a new page using your custom theme, click on **New Page**



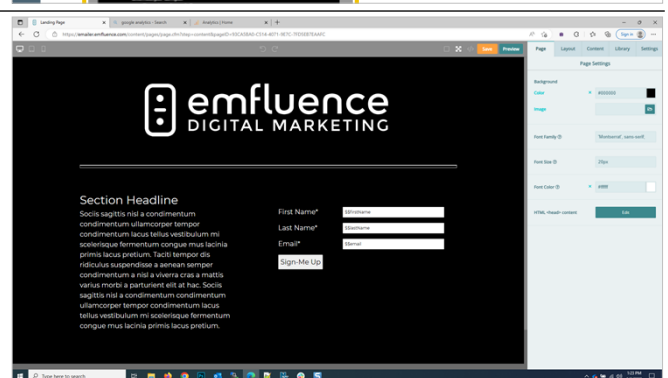
Select a Drag and Drop page



You will now find a section with your custom themes available above the starter themes in your account. **Select your custom theme**

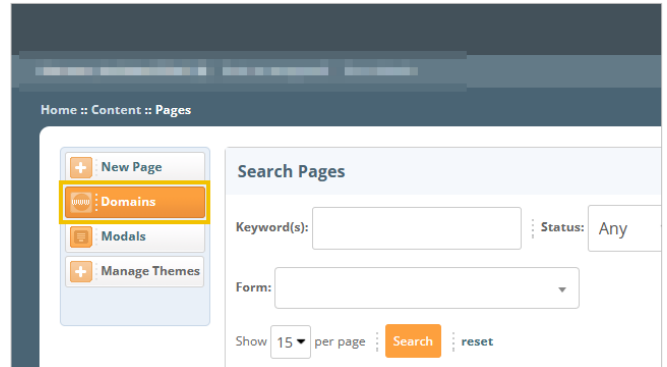


You can now make any edits to your new page without fear of changing the saved theme. If your theme has a form saved into it, you would likely want to swap out a new form as changes made to the existing form would change the form on every page where it exists.

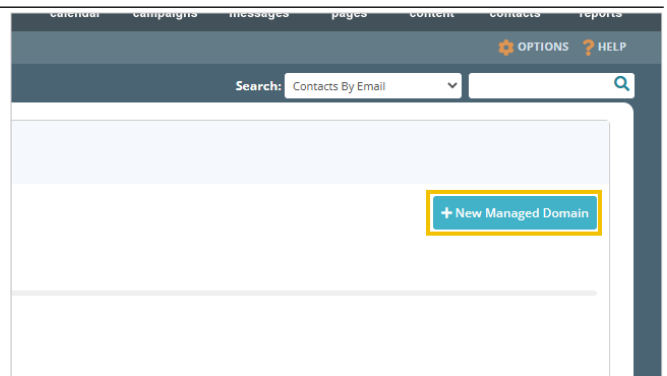


3.3. Landing Page Managed Domains

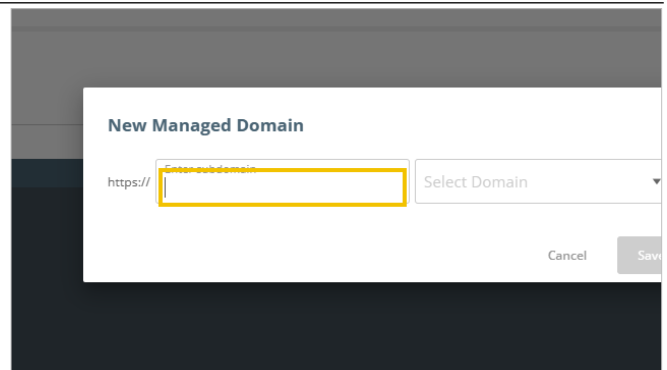
To make the landing pages in your account more branded, you can use emfluence-hosted subdomains. Click on **Domains** to see your existing domains or create new ones.



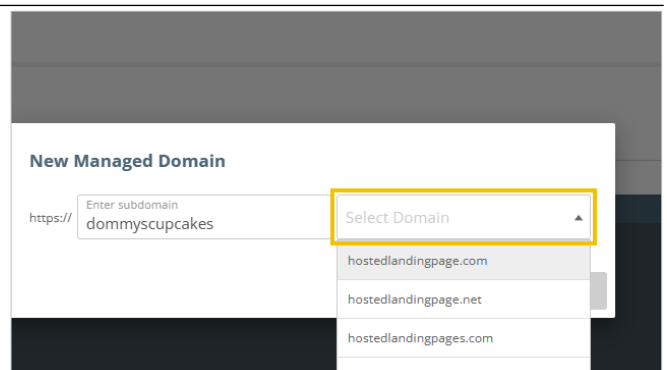
To add a domain, click **New Managed Domain**



Type the name of your subdomain in the first input field. It should be simple. Avoid spaces, non-alphanumeric characters, etc.

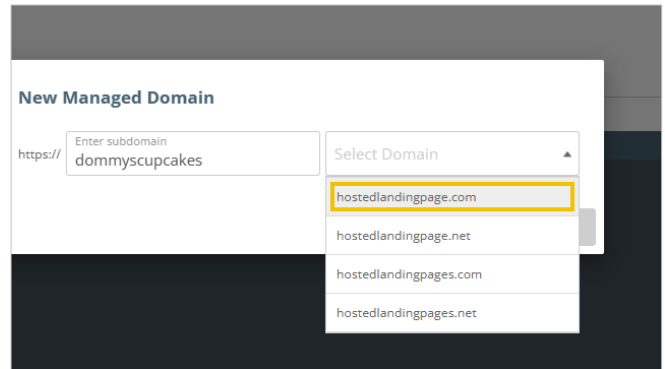


Expand the selection under **Select Domain**, to view the available domains

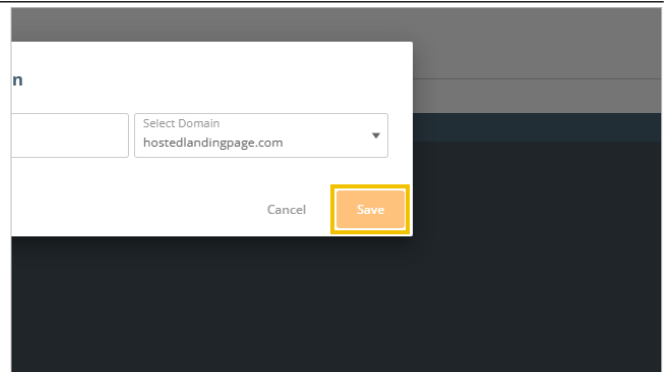


emfluence Help Section

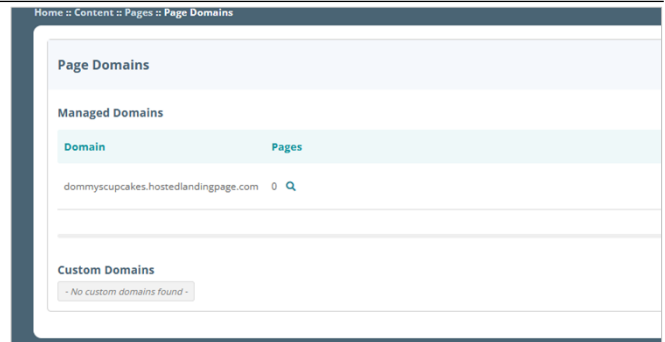
Under Select Domain, select one of the available domains to complete your managed subdomain such as **hostedlandingpage.com**



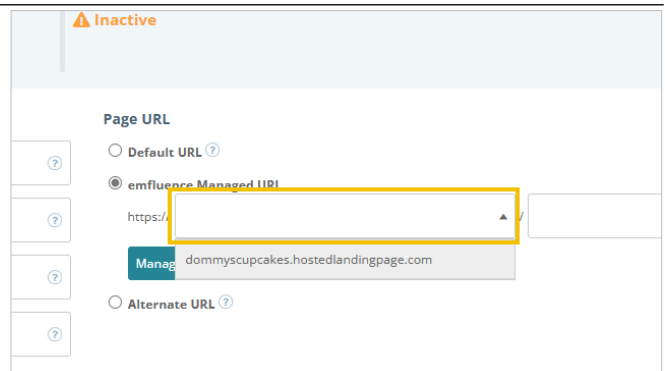
Click to **Save**



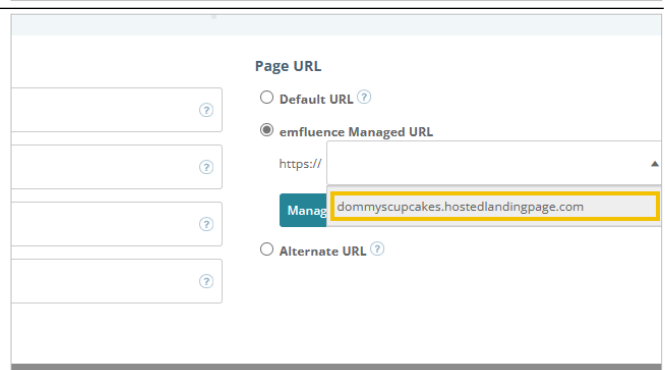
Your emfluence-managed subdomain will now be visible. If you've set up any custom domains (to have fully branded URLs) those will show up in the section below.



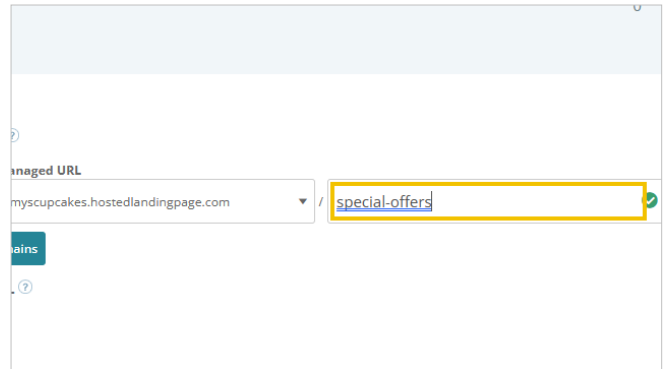
When making a new page, you can now choose your subdomain from the emfluence Managed URL dropdown



Choose your domain from the dropdown

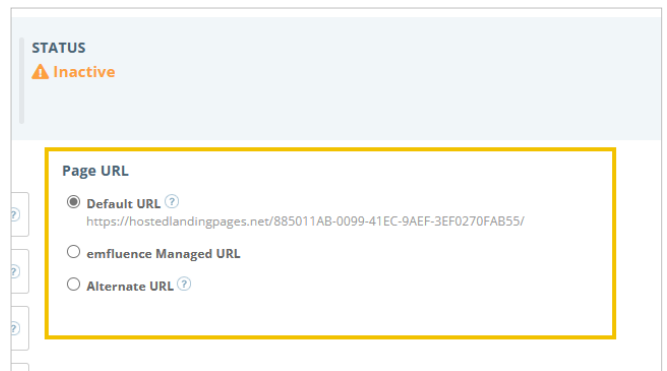


Type to complete the URL with a page name. Avoid spaces, non-alphanumeric characters, or anything else that might disrupt the URL. If the page is available (and not already in use) a green checkmark will appear

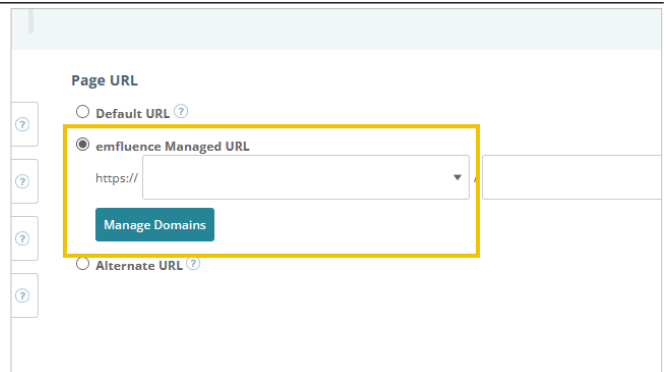


3.4. Landing Page Custom Domains

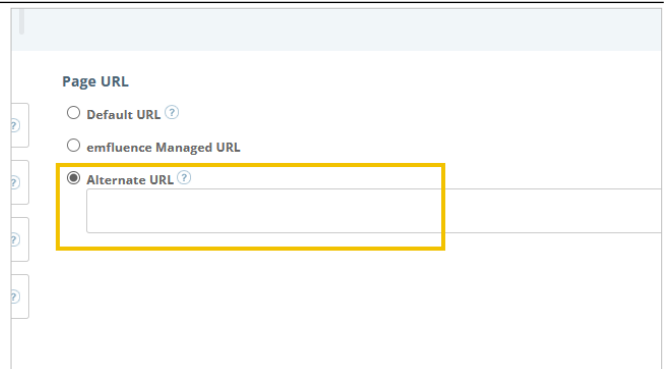
emfluence Landing Pages will be assigned a random URL through a domain emfluence owns. However, there are ways you can make this URL be more branded to your domain.



Using an **emfluence Managed Subdomain** you can create a managed subdomain for your account. While the domain itself will still be one of the hostedlandingpages URLs, the branded subdomain at the front, and the ability to specify the end of the URL, does give you some control. For more on emfluence managed subdomains, check out that video.



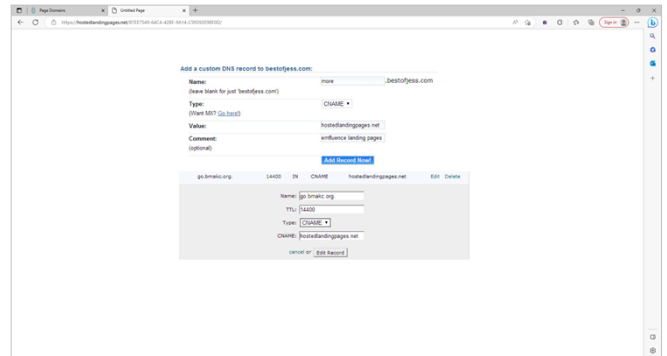
For full control of the URL you can take advantage of the **Alternate URL** option. Unlike a managed subdomain inside of emfluence, this does require someone on your side doing some setup.



emfluence Help Section

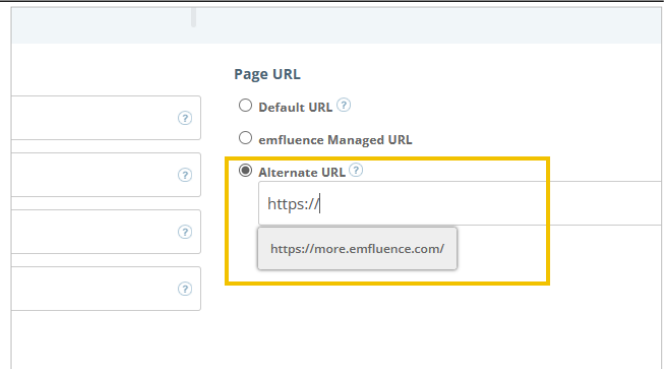
To set up a subdomain on your own website for your emfluence landing pages, you'll need to access the domain records for your site.

From the domain management panel of your website admin, add a custom DNS record for your website. Type the name of your subdomain and then choose CNAME as your subdomain and point it to hostedlandingpages.net.

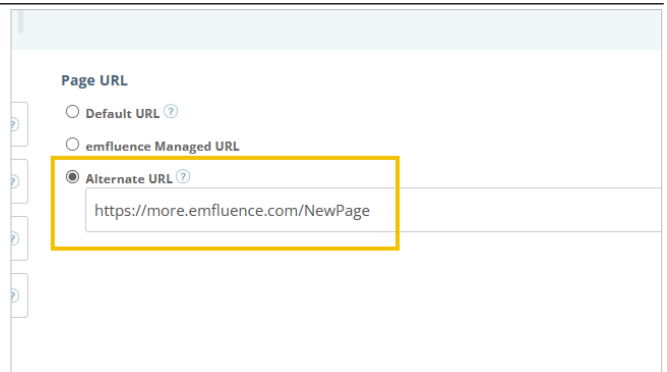


Once a custom domain is saved within your account, when using the Alternate URL option, you will be prompted to choose the saved domain.

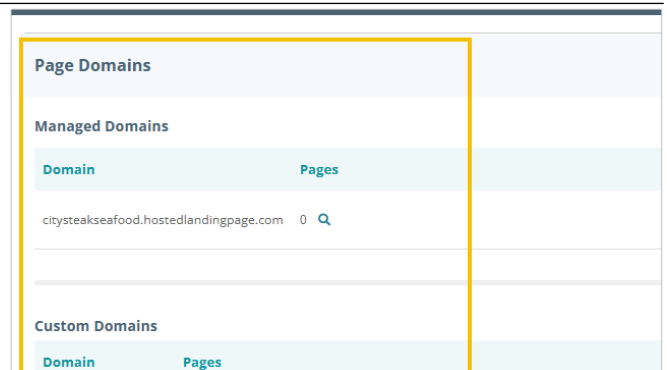
NOTE: Typing a domain that is not properly set-up, or using a custom domain missing the necessary records, will result in a failed URL.



You can then finish the URL by typing the remainder of the page location you wish to use. Make sure you don't use spaces or any character that might break a URL. A check will be done to let you know if a page is in use. If you attempt to save a new page with a URL already in use, you will receive an error message.

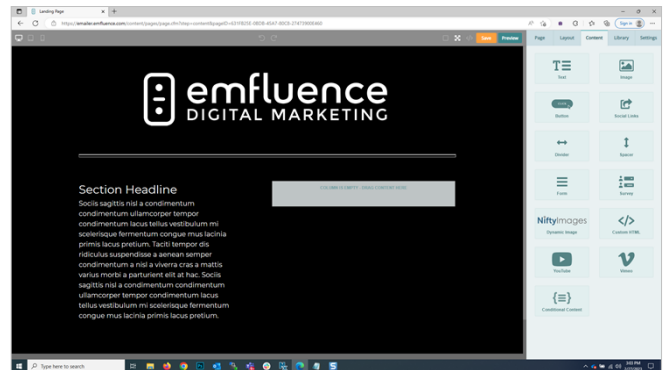


You can find a list of both your managed domains and custom domains in the Page Domains page of the Landing Page section.



3.5. Add Form to Landing Page

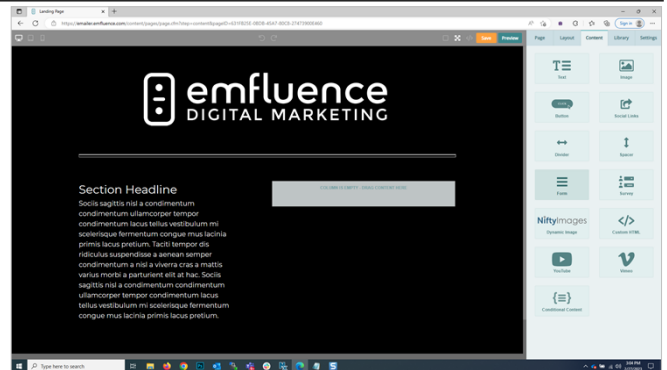
Forms need to be placed within an emfluence landing page. This can be a simple page, where you plan on iframing the content within your website, or can be a more branded standalone page



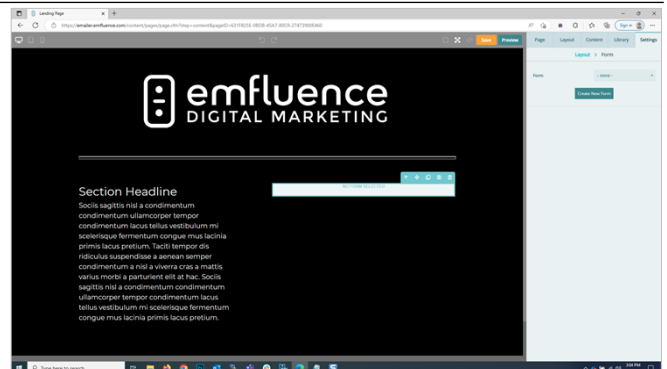
To add a form to a landing page, find **Forms** under the Content menu in the right-sidebar



Drag the form over to the spot in your page where you want it to appear, and drop it in

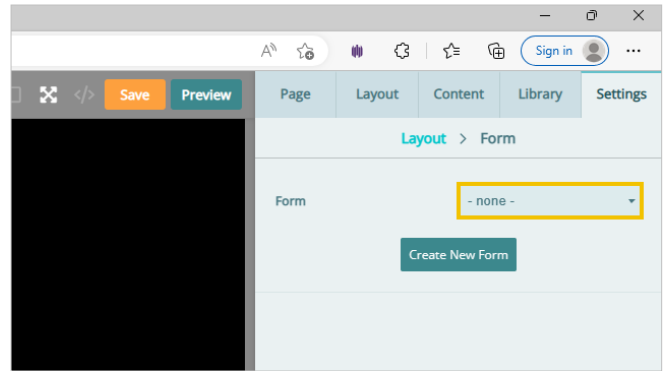


Click your placeholder to select it

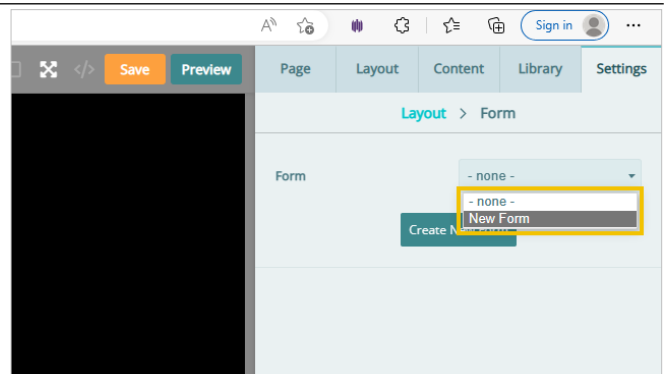


emfluence Help Section

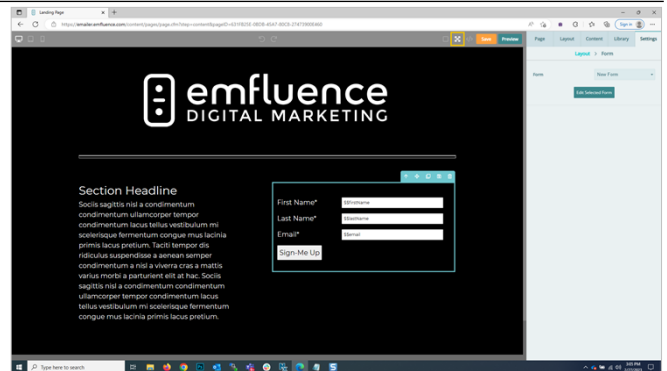
In the Settings, you can either click Create New Form if your form hasn't been created, or to use an existing form, **Select** your form from the dropdown provided



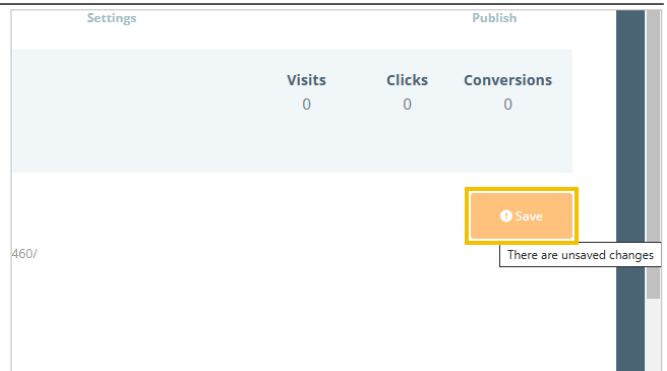
Select the form you want to add from the list



You should now see your form inserted. If your form has no CSS directly applied, the CSS of the page will apply. Any formatting on the form itself will overwrite the page formatting. Click on the **Fullscreen** icon to return to the full page options

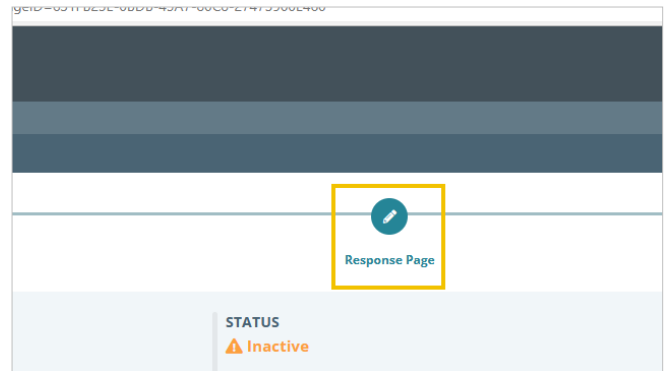


Click **Save**

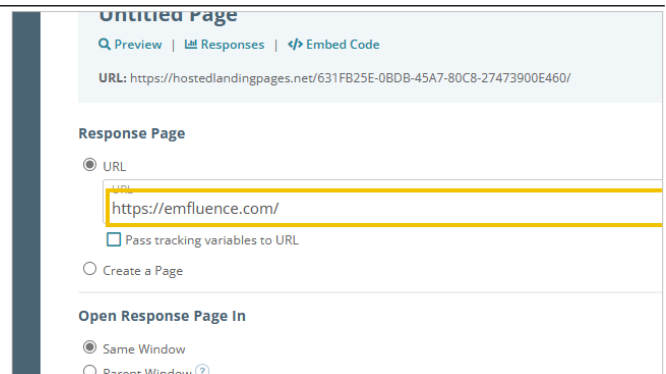


emfluence Help Section

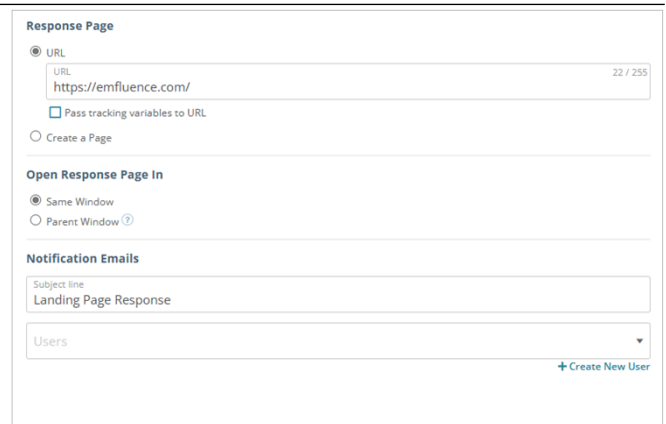
Now that the page with the form has been saved, the Response Page step will be unlocked (you only need to create response step pages for pages with forms). Click on **Response Page**



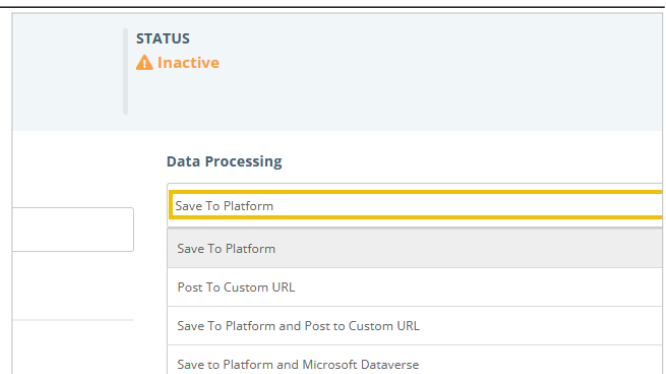
The response page controls where the form will take the contact after they hit submit. You can either send them to an existing URL (such as your website) or you can create a simple thank you page using the page you created as a starting point



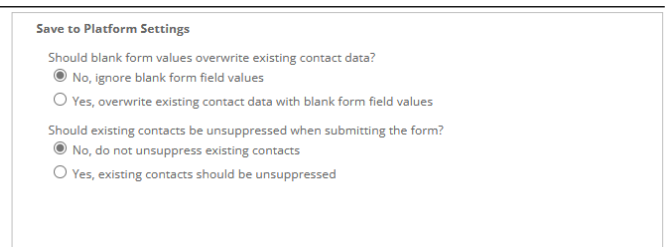
Other options on the response page include where you want the page to open. If you plan on framing the page into an existing page on your website you may want to open in the Parent Window. You can also set up a notification email to notify any user(s) in the platform when a new form entry is made.



The default option on the form is to Save to Platform. However, you can also post that data to a URL by choosing Save To Platform and Post to Custom URL (you will need to set up a URL to properly handle the data). Or, if you use the emfluence Dataverse connection you can choose to Save to the Platform and also post that data to Dynamics

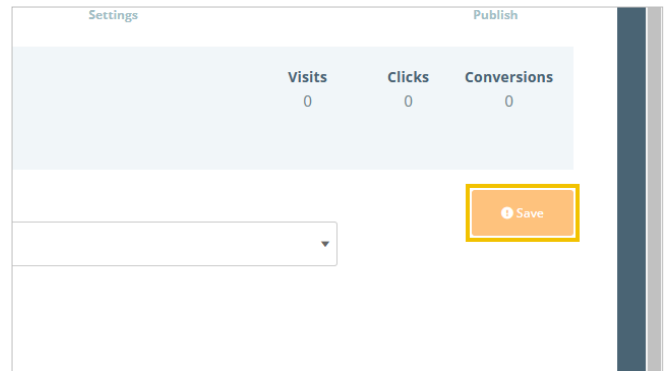


You can also choose whether or not you want blank fields to overwrite data within in emfluence and if you want a new submission for a suppressed contact to reset their suppression within your account

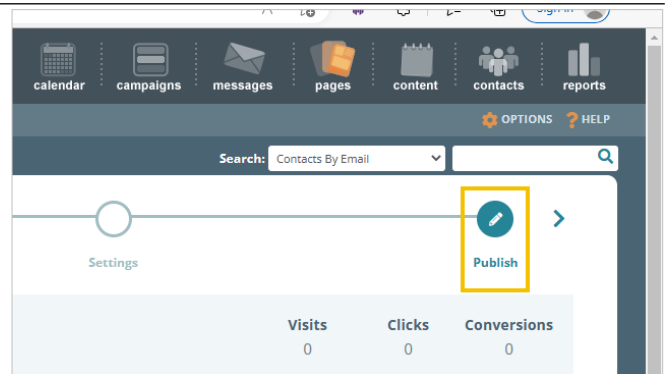


emfluence Help Section

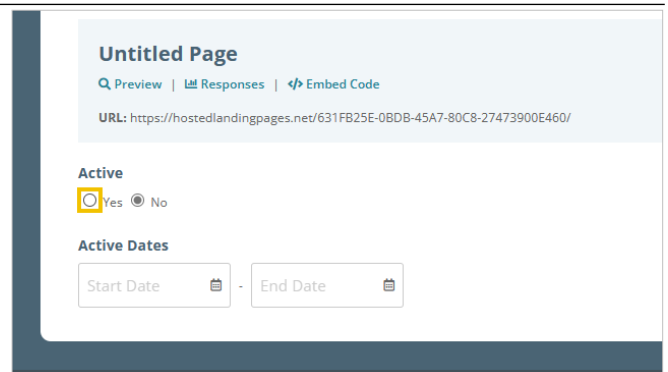
Click to **Save**



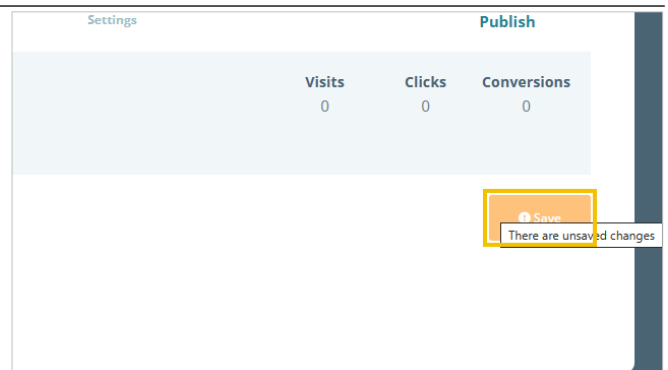
Advance to the **Publish** step



Don't forget to activate your page by toggling **Active** to **Yes**



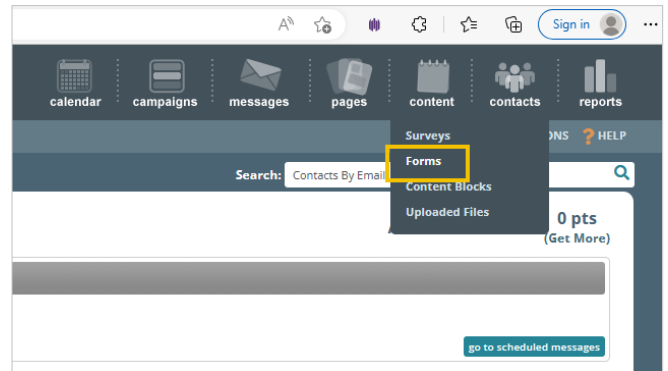
Click **Save**



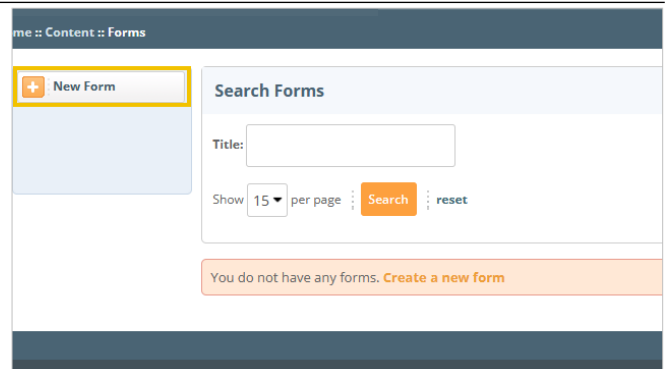
4. Forms

4.1. Create a Form

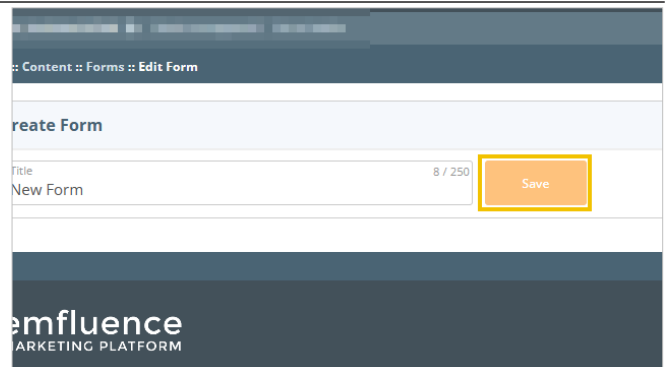
In the top menu, hover over **Content** and click on the link **Forms**



Click **New form**

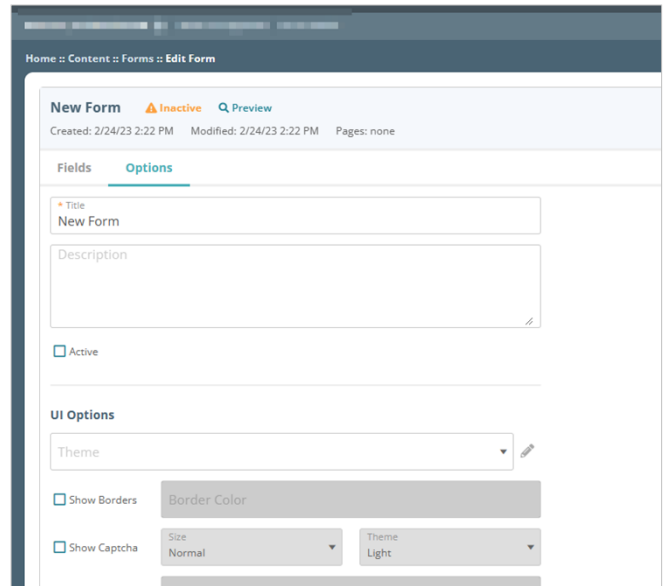


Type the name of your new form and click on the button **Save**

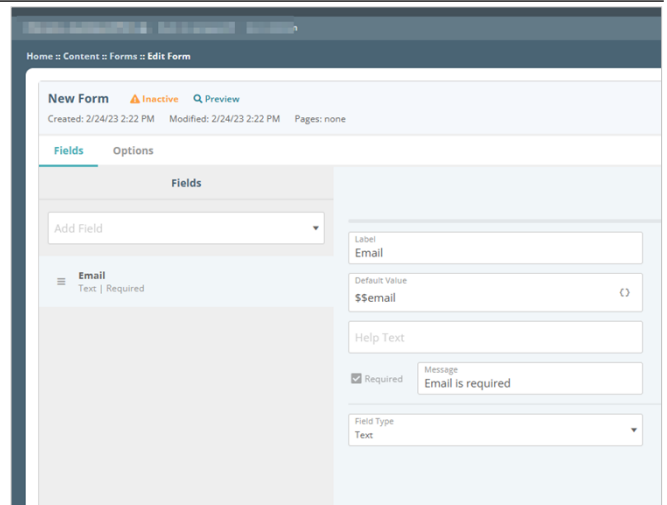


emfluence Help Section

In the Options menu, you can activate your form and set specific settings such as choose groups for your form to add contacts to and add a reCAPTCHA.

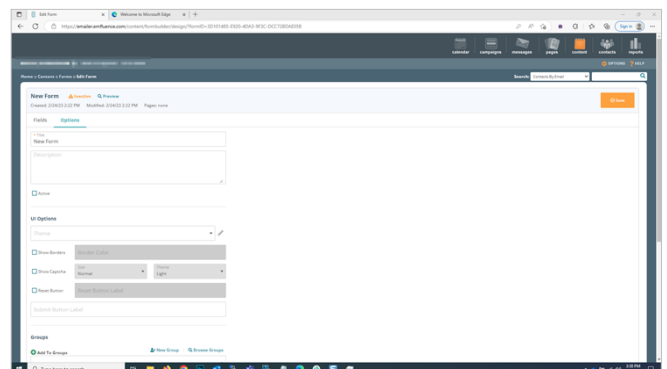


On the Fields tab you can add and rearrange fields you want to capture data from your form.



4.2. Form Options Menu

On the Options menu you will be able to activate and choose from several optional settings for your form.



emfluence Help Section

Like surveys and landing pages, forms are inactive by default. To make a form active, check the box next to **Active**.

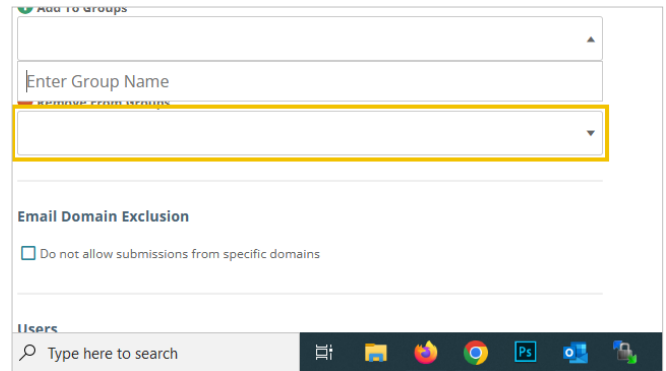
By default, your form will have minimal formatting and will accept the formatting of the landing page in which you add it. If you would prefer to add formatting directly on the form (which will overwrite your landing page formatting) you can choose to load a preset **Theme** or add your own **CSS**.

By default your submit button will show as Submit. If you wish, you can customize the wording of a button to any word or phrase that fits within the character limit by typing in the **Submit Button Label**

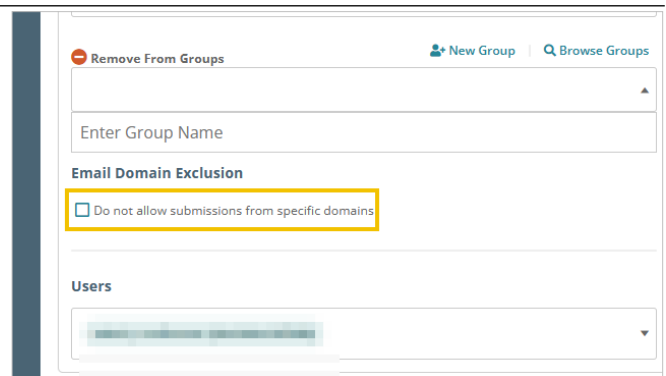
Forms can feed one or more groups. It's a good idea to have a group just for your form submitters, and you may also wish to add them to other lists in your account. If the group already exists, you can start typing the name in the **Add to Groups** field and choose it from the list, or find it in the Browse Groups option. If the group does not yet exist, you can click New Group and create your group. When you save the new group will be inserted into the Add to Groups line

emfluence Help Section

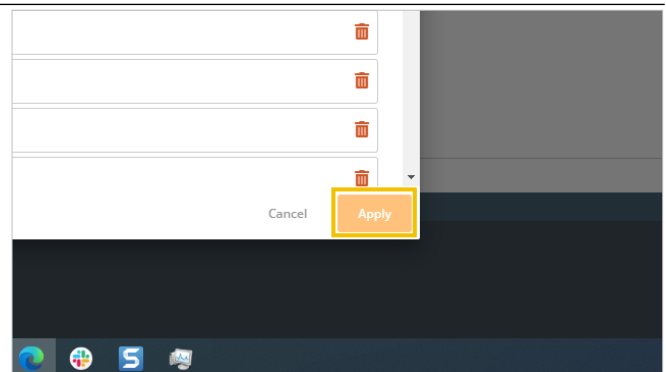
Optionally, you may also want to remove a contact from a different group when they fill out your form. This would be useful in terms of a survey group where you would add contacts to a survey completed group and remove them from an initial group allowing you to resend to that initial group without worrying about sending to contacts who already completed the survey



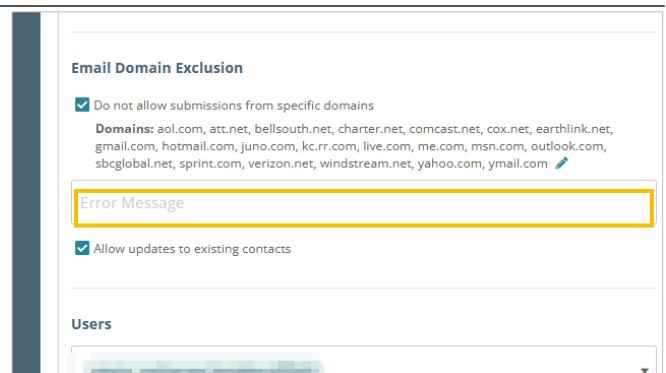
You may wish to limit which domains can be added (to either force contacts to use a business address or prevent competitor domains from signing up for you content. To do so, click on the label **Do not allow submissions from specific domains**



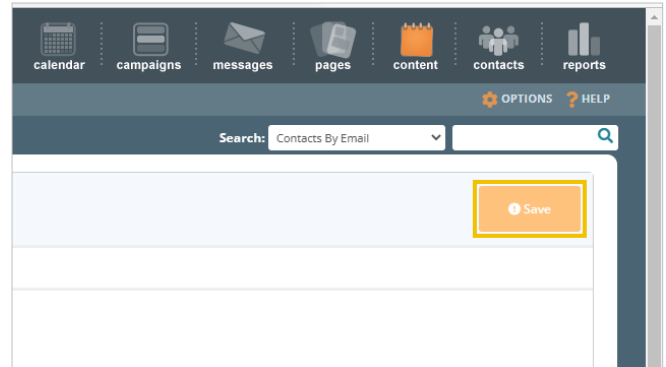
You can choose from the list of premade consumer domains, add your own, or mix and match. When finished, click on the button **Apply**



If you make use of the domain exclusion feature you will also need to write an error message asking the submitter to use a different email address

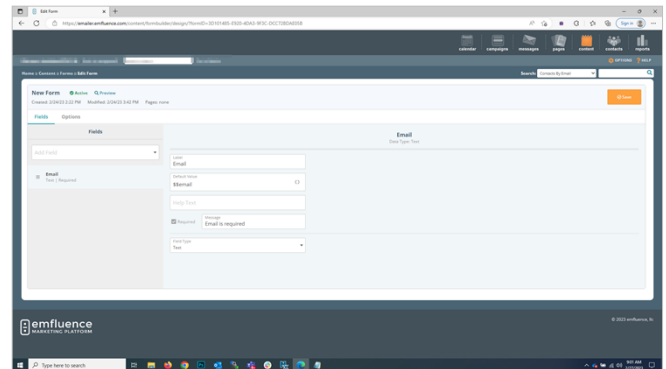


When you are finished setting your options, click on the button **Save**

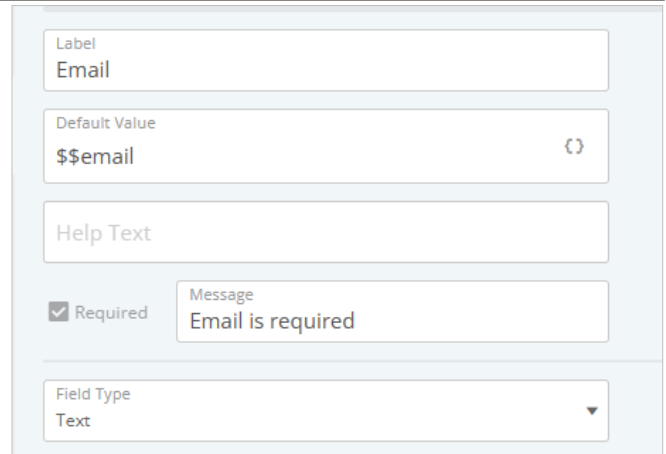


4.3. Setting Form Fields

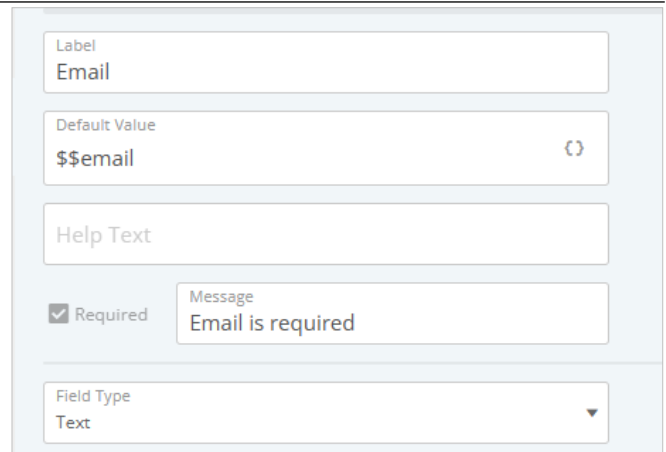
On the Fields tab, you can choose which emfluence form fields you wish to capture on your form



Email will be preselected on your form as it is required to save a contact within the emfluence Marketing Platform

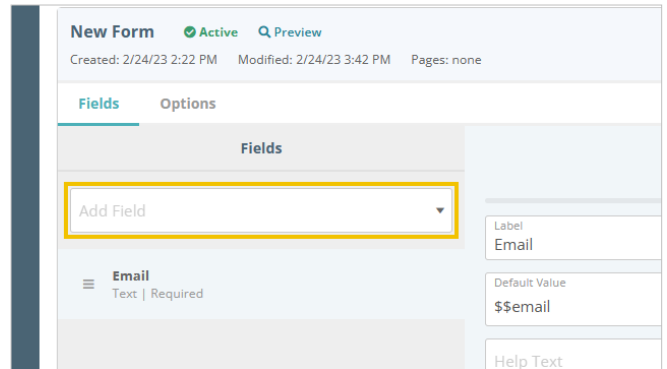


The Label name is what will be shown on the form field. Help Text can be added to explain the information you are looking for. The default value can be blank, have a static value, or use a variable. The default is to use a variable so if a known contact hits that form their value will be shown automatically

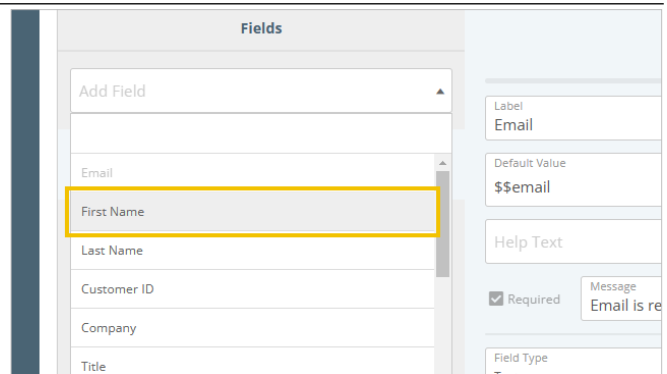


emfluence Help Section

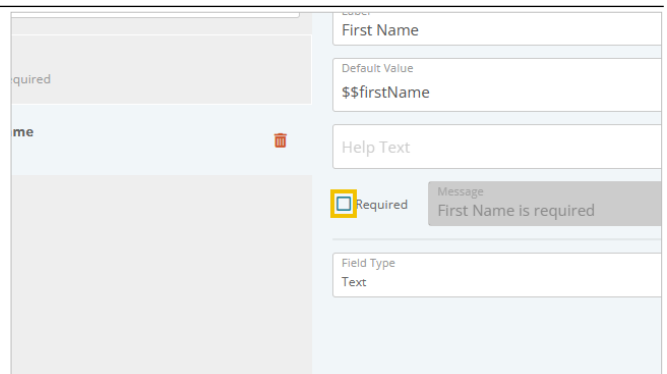
You can add other fields to the form, one at a time, by clicking on **Add Field**



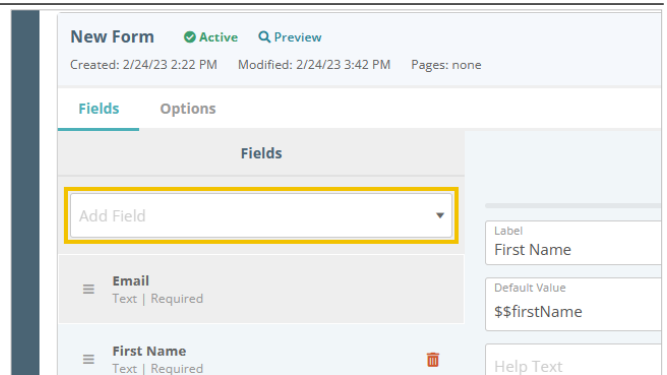
To add a standard field such as First Name, find the field in the dropdown and click on **First Name**



The First Name value is added. You can edit the Label, Default Value, add Help Text, and choose whether or not to make the field required. If a field is required, a value must be chosen for the form to save. To make the field required check the box next to **Required**



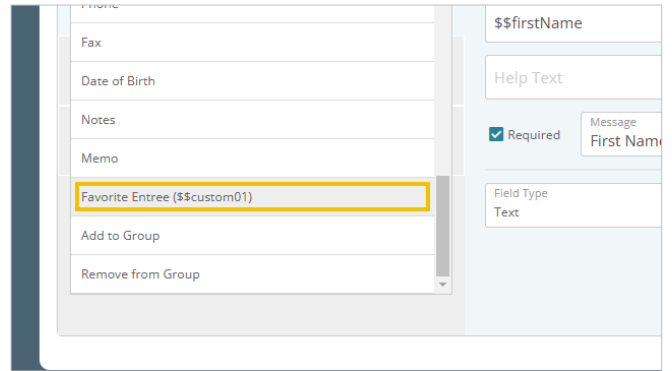
You can add other fields in the same manner through the dropdown. Standard fields will show up at the top of your list with custom fields showing near the bottom



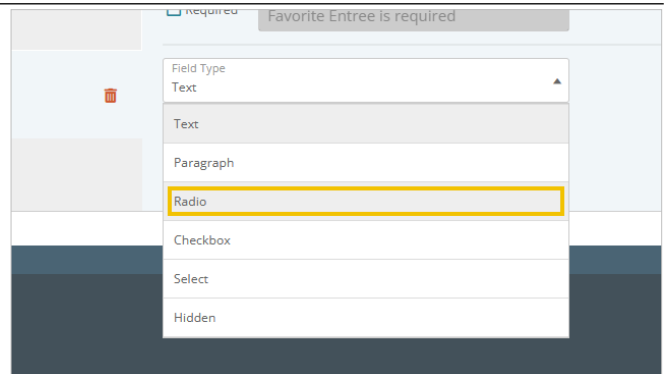
To reorder fields, put your mouse over the three-line menu for that field and **Drag** it above or below other fields

emfluence Help Section

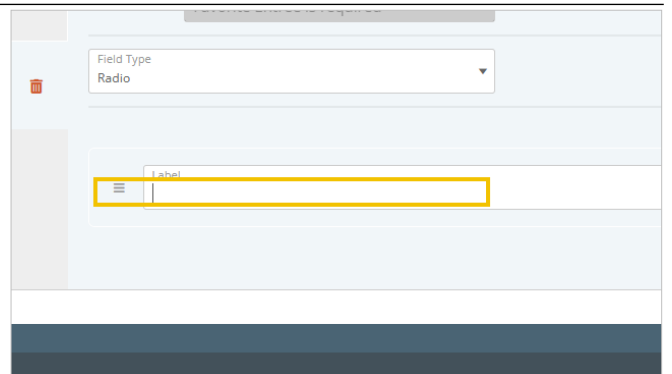
To add custom fields, scroll to the button and find the field you wish to add. As with standard fields, default choices will appear. Click on the **custom 1 field**



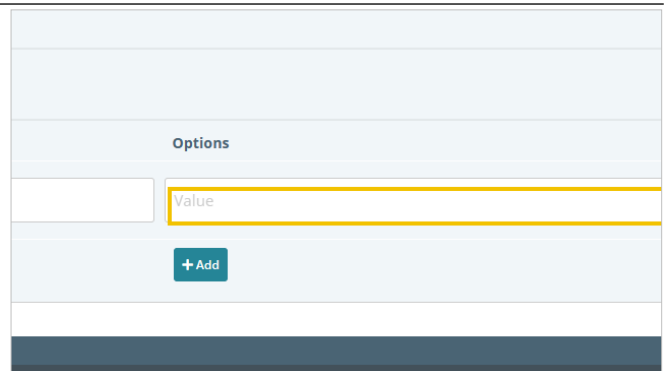
There are multiple types for the field to be show in. Text allows the form taker to write in a response. Paragraph is a larger write-in field. Radio, Checkbox, and Select offer a predetermined list of values that the form taker can choose from. Click on **Radio**



Type or write the name of the **Label** you want to show on the form

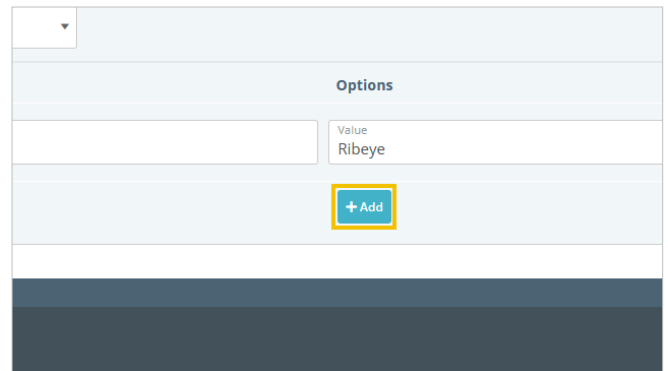


When you click into the Value field it will pre-add your Label. However, you can change your value to be anything. The value is what will be saved to that field on the contact record. For example if you were listing locations, you might want a friendly name in the Label but perhaps a store number in the value

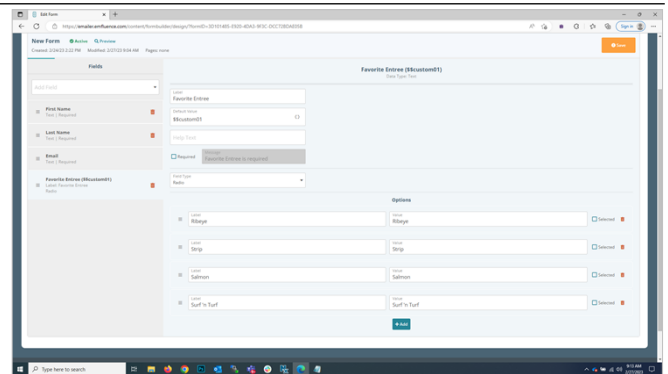


emfluence Help Section

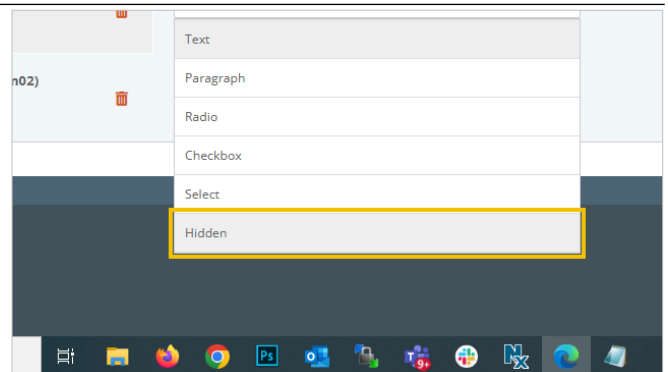
To add more choices, click on the button **Add**



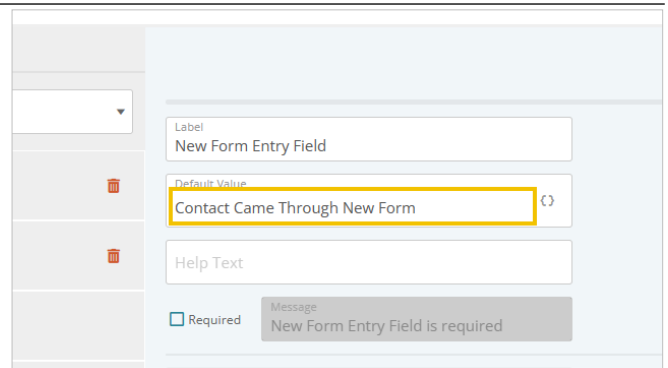
You can add multiple choices for this field. Provide a Label and Value for each one



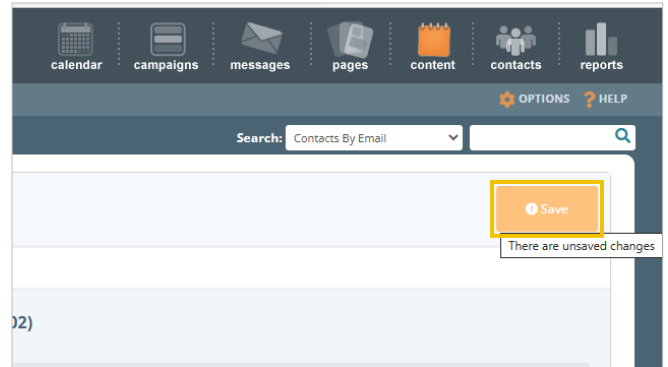
There is another type of field on a form called Hidden Field. This will not show up on form, but will be filled in behind-the-scenes with a value you set. To make a field hidden, click on **Hidden**



Because the field is hidden, we'd suggest using a static default value rather than the default variable. If an unknown contact attempts to fill out the form a variable could not be filled in for them and the form entry would fail. Type the value you want the hidden form to write on the record in the **Default Value**

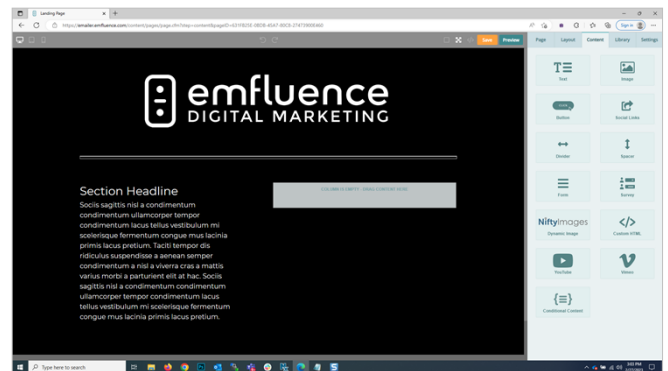


Conclude by clicking the **Save** button

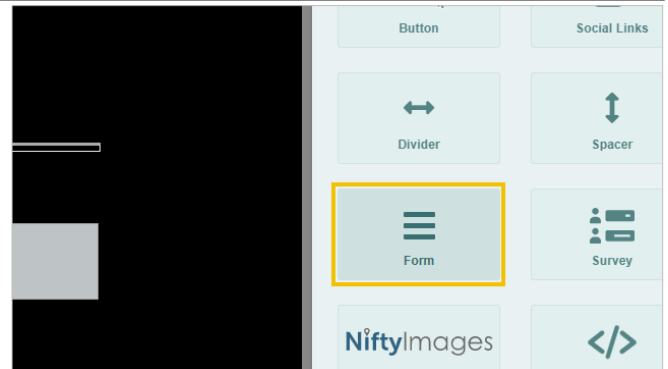


4.4. Add Form to Landing Page

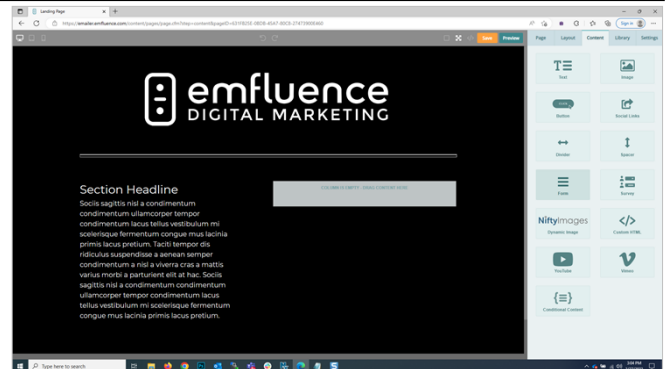
Forms need to be placed within an emfluence landing page. This can be a simple page, where you plan on iframing the content within your website, or can be a more branded standalone page



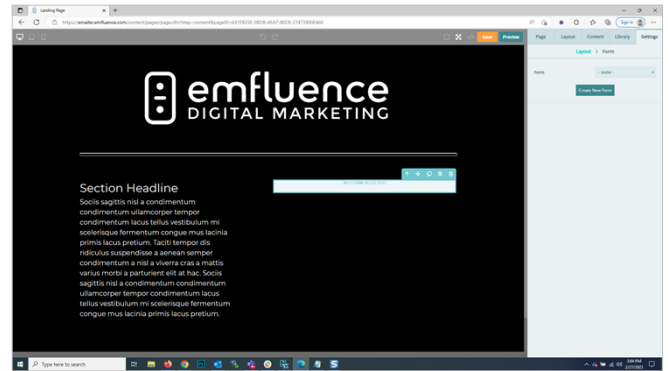
To add a form to a landing page, find **Forms** under the Content menu in the right-sidebar



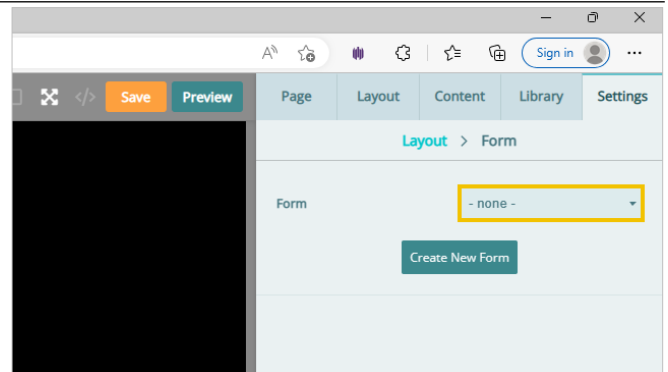
Drag the form over to the spot in your page where you want it to appear, and drop it in



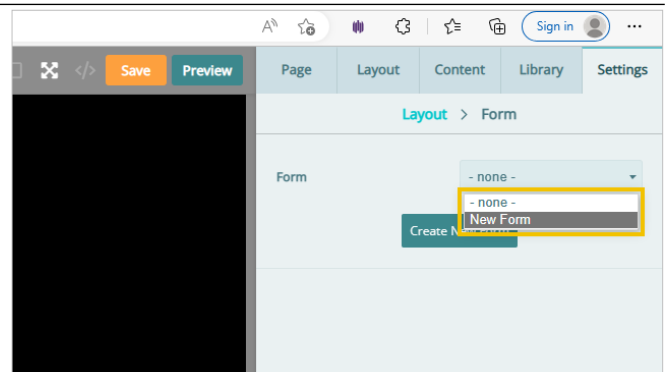
Click your placeholder to select it



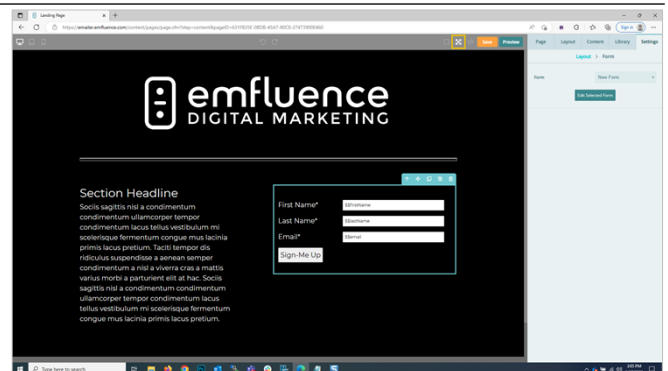
In the Settings, you can either click Create New Form if your form hasn't been created, or to use an existing form, **Select** your form from the dropdown provided



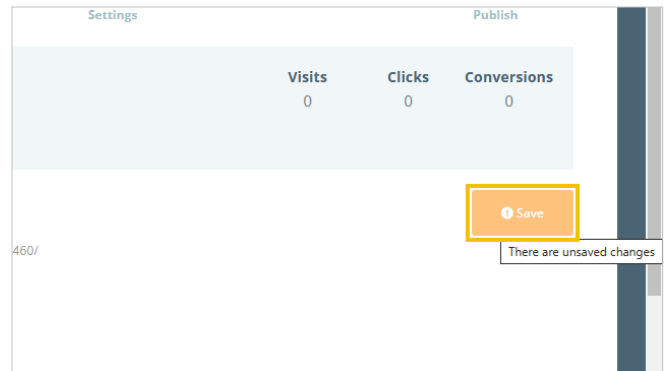
Select the form you want to add from the list



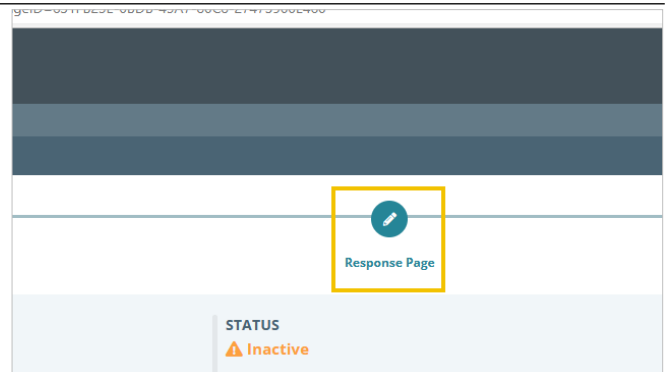
You should now see your form inserted. If your form has no CSS directly applied, the CSS of the page will apply. Any formatting on the form itself will overwrite the page formatting. Click on the **Fullscreen** icon to return to the full page options



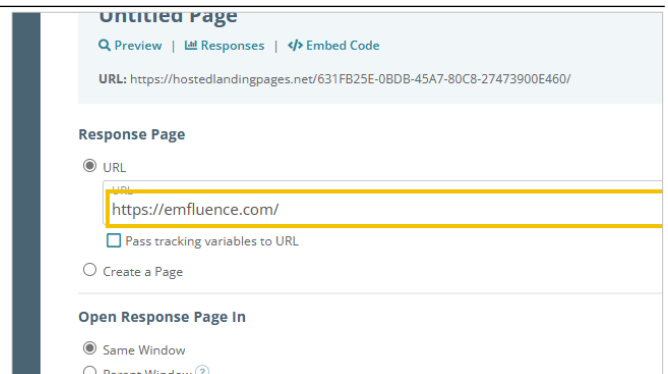
Click **Save**



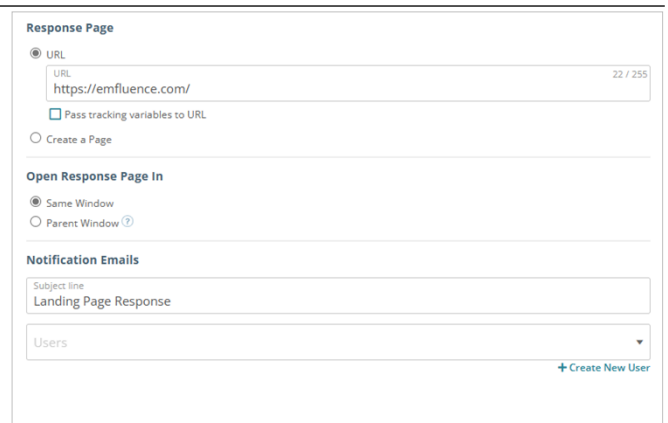
Now that the page with the form has been saved, the Response Page step will be unlocked (you only need to create response pages for pages with forms). Click on **Response Page**



The response page controls where the form will take the contact after they hit submit. You can either send them to an existing URL (such as your website) or you can create a simple thank you page using the page you created as a starting point

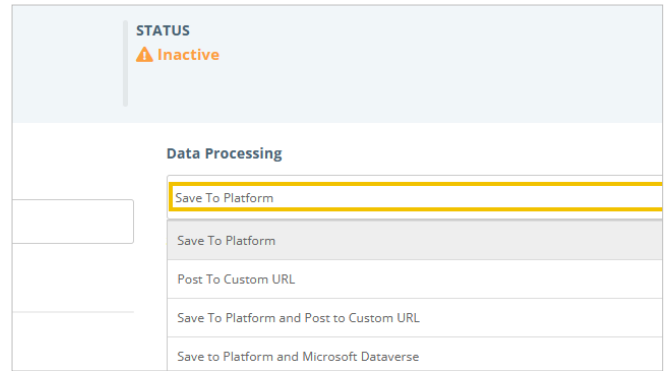


Other options on the response page include where you want the page to open. If you plan on framing the page into an existing page on your website you may want to open in the Parent Window. You can also set up a notification email to notify any user(s) in the platform when a new form entry is made.

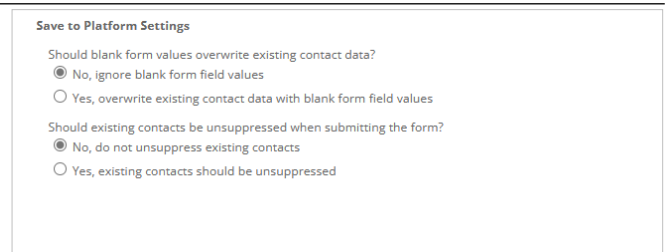


emfluence Help Section

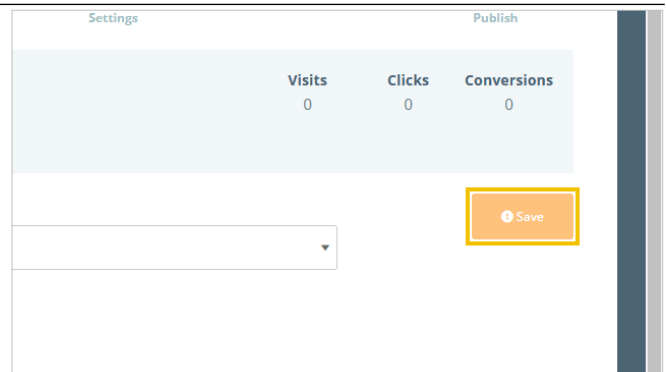
The default option on the form is to Save to Platform. However, you can also post that data to a URL by choosing Save To Platform and Post to Custom URL (you will need to set up a URL to properly handle the data). Or, if you use the emfluence Dataverse connection you can choose to Save to the Platform and also post that data to Dynamics



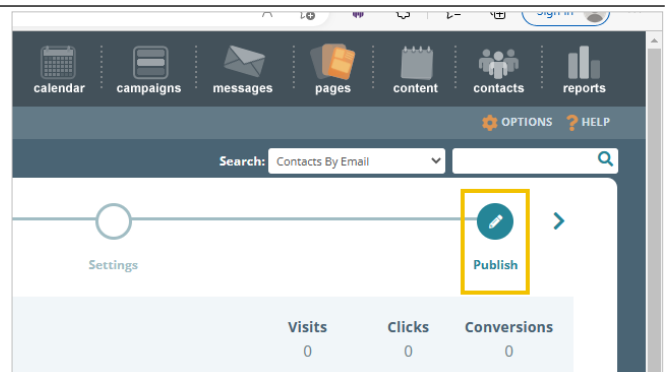
You can also choose whether or not you want blank fields to overwrite data within in emvfluence and if you want a new submission for a suppressed contact to reset their suppression within your account



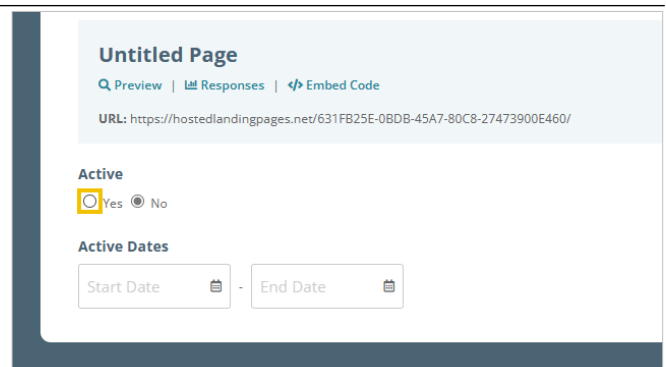
Click to **Save**



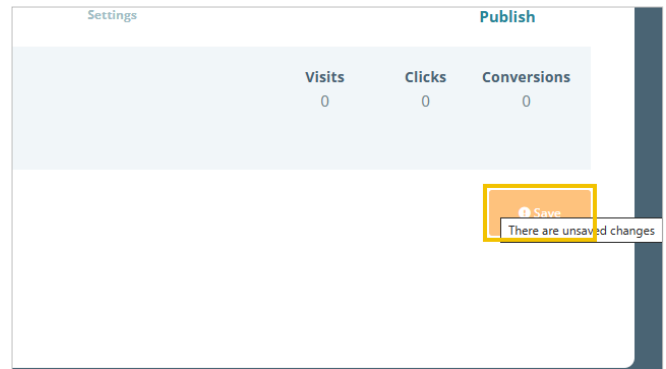
Advance to the **Publish** step



Don't forget to activate your page by toggling **Active** to **Yes**

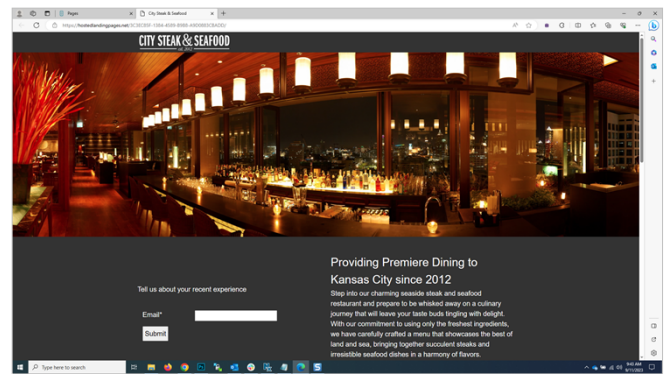


Click **Save**



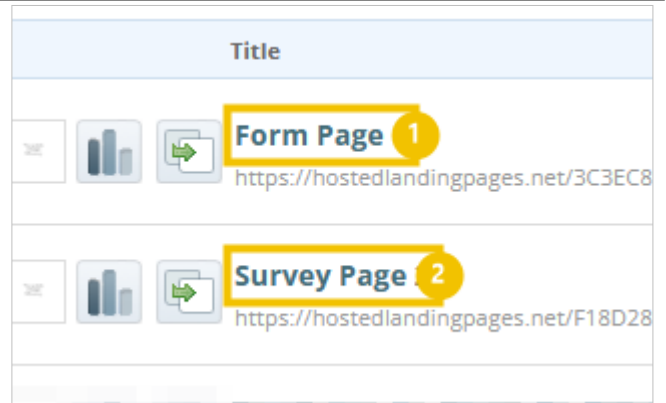
4.5. Progressive Forms

You can create progressive forms to break up a large number of requested form fields over multiple pages, or to lead a form into a survey (which will help tie a survey entry back to a contact).

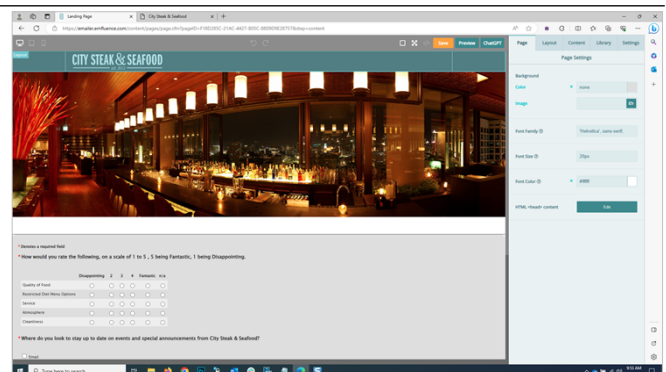


Create the separate pages with forms and surveys. Then you will connect them through the form response page options.

1. **First Page:** Your first page with your initial form.
2. **Second Page:** Your second page with an additional form or survey.

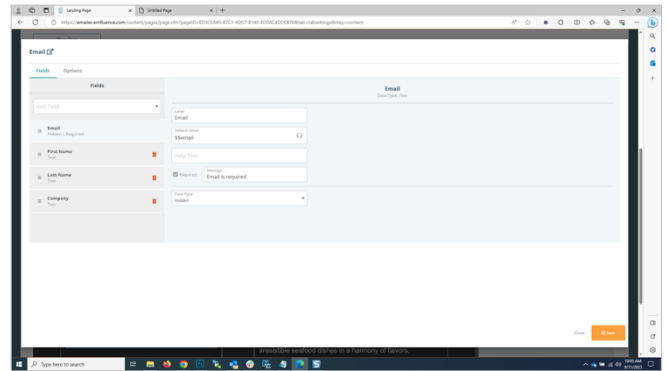


Start with building your final page in your series.

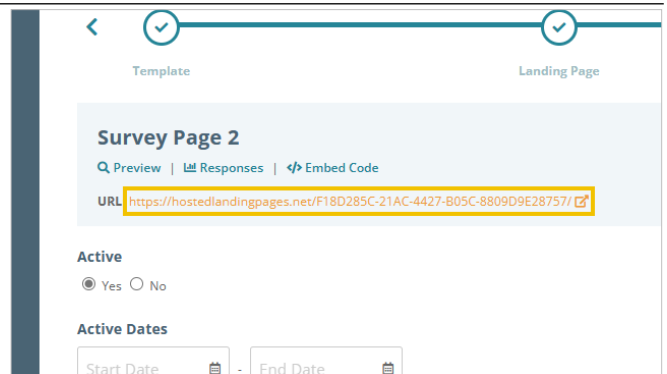


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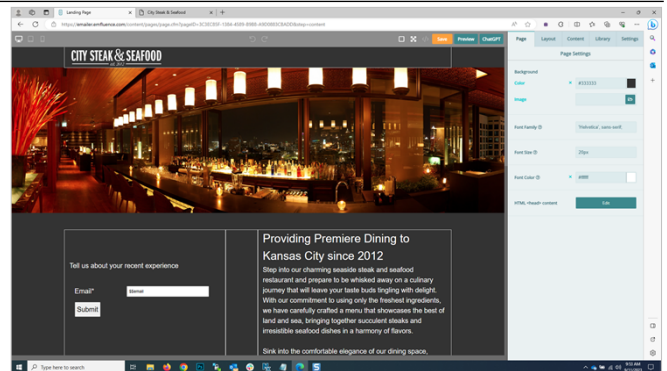
If you are moving from form 1 to form 2, you still need email data to connect the two entries. However, email does not need to appear on the second form. On your second form, make the required email field a Hidden field (whose value will be passed from the form on page 1).



Publish your page and copy the URL which you will use for the response page of your earlier page.



Create your initial page with your form.

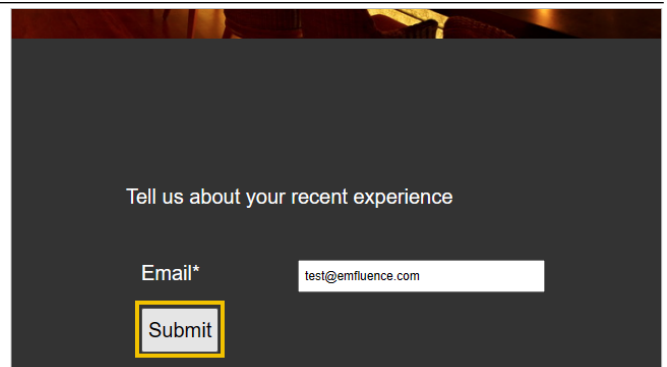


Paste in the URL from your second page as the URL for your response page. Don't forget to also check the box to pass content on to the new page.

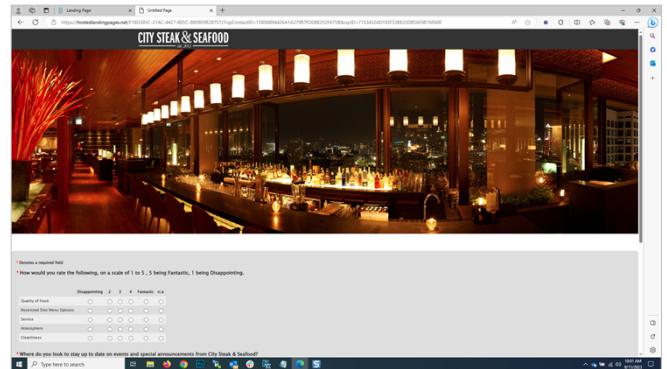
1. **Second Page URL:** Paste the URL for your second page under the URL option for your response page.
2. **Pass tracking variables to URL:** Check the box to pass tracking variables from your initial page to your second page.



You can then test your pages by filling out the form.



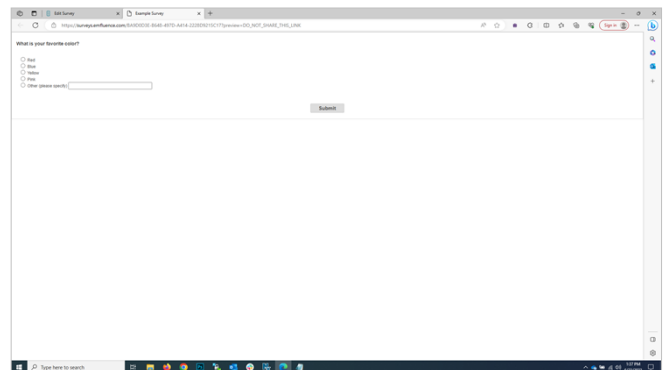
Then fill out your form and/or survey on the second page and you can confirm your information saved correctly.



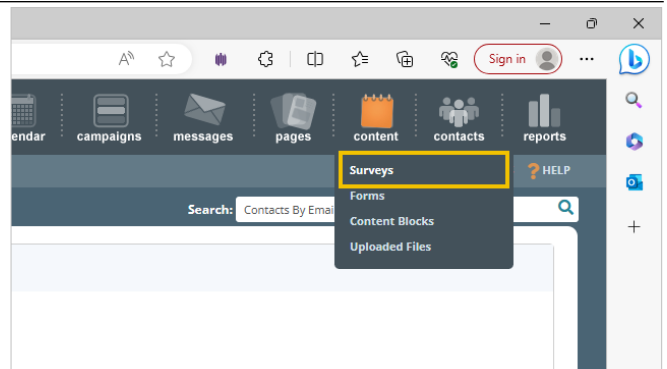
5. Surveys

5.1. Create a Survey

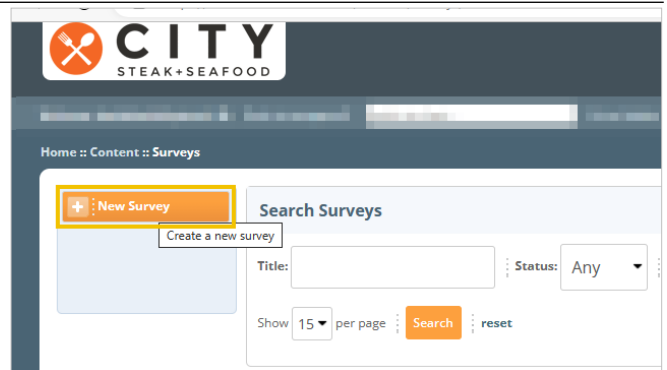
You can use the emfluence Platform to create and distribute surveys to your contacts.



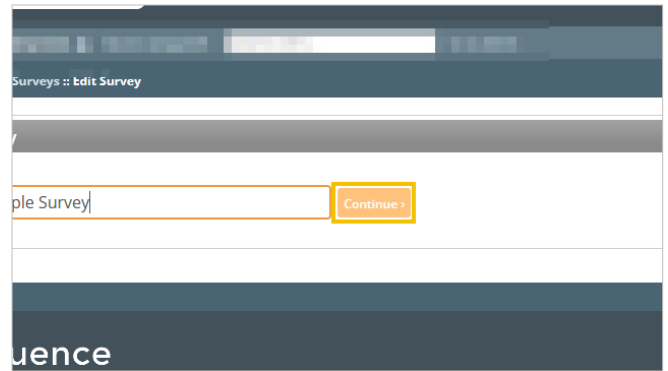
Surveys can be found in the **Content** section.



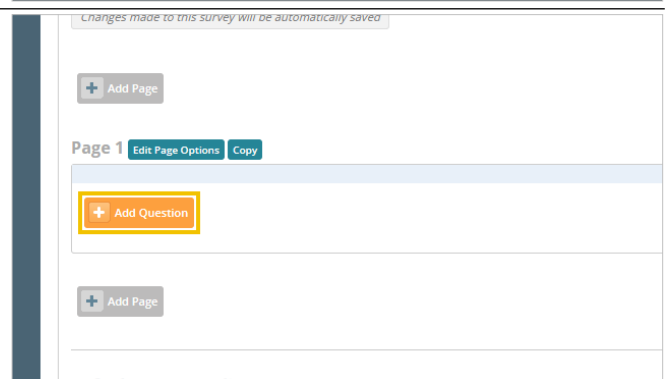
To create a new survey, click on **Create a new survey**



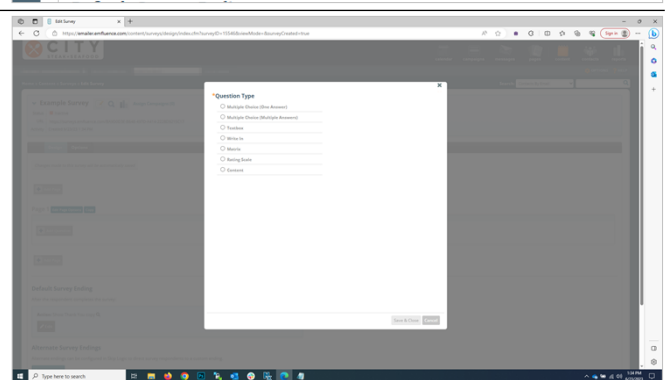
Name your survey and click **Continue**



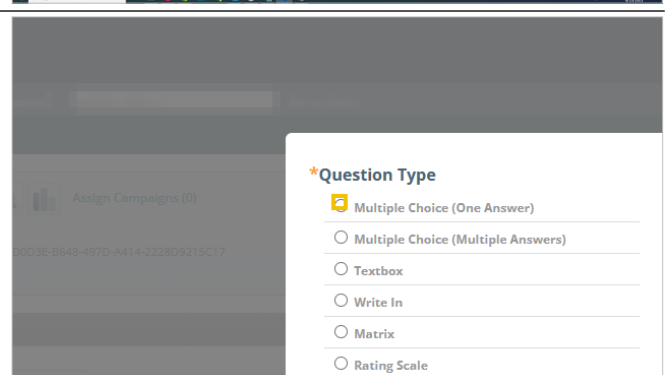
Surveys can be multi-question and multi-page. To create your first question, under Page 1, click **Add Question**



There are multiple survey question types you can use. Hover over any of the question types to learn about each one.

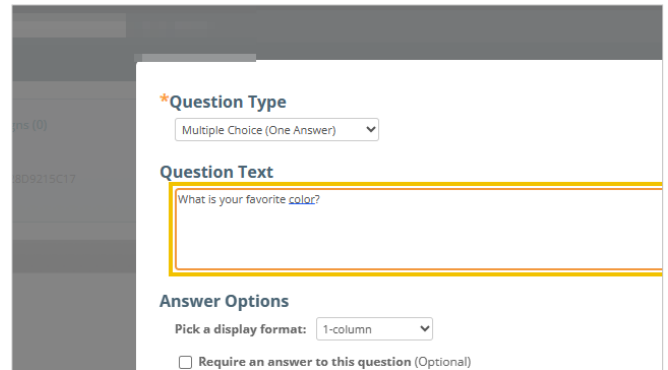


To choose your question type, check the radio button for that type.



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In the top box, you will write your question.

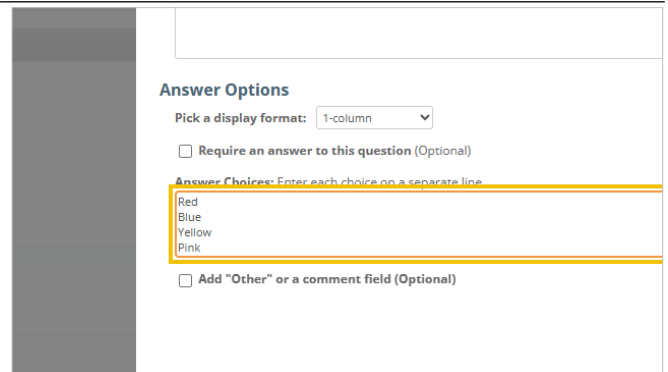


***Question Type**
Multiple Choice (One Answer) ▼

Question Text
What is your favorite color?

Answer Options
Pick a display format: 1-column ▼
 Require an answer to this question (Optional)

For any question type where you are providing answers rather than a simple write-in response, you can type in your answer choices separating each one on its own line.

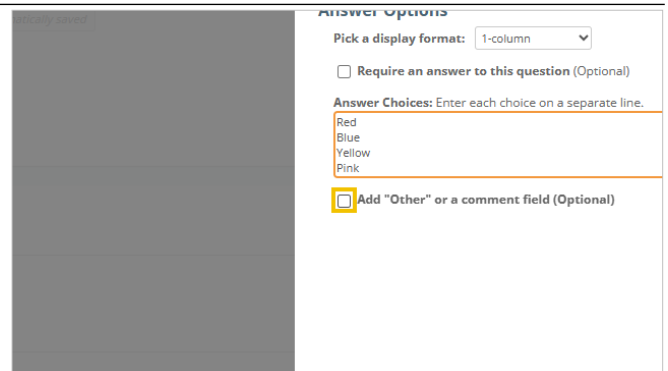


Answer Options
Pick a display format: 1-column ▼
 Require an answer to this question (Optional)

Answer Choices: Enter each choice on a separate line.
Red
Blue
Yellow
Pink

Add "Other" or a comment field (Optional)

On multiple choice questions, you have the choice to add a write-in response by clicking on the checkbox **Add "Other" or a comment field (Optional)**

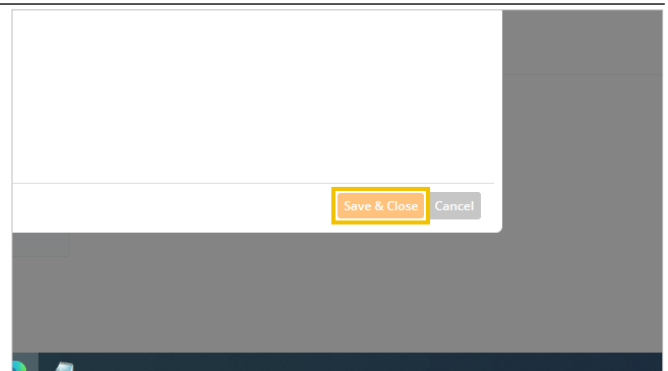


Answer Options
Pick a display format: 1-column ▼
 Require an answer to this question (Optional)

Answer Choices: Enter each choice on a separate line.
Red
Blue
Yellow
Pink

Add "Other" or a comment field (Optional)

Click on the button **Save & Close**

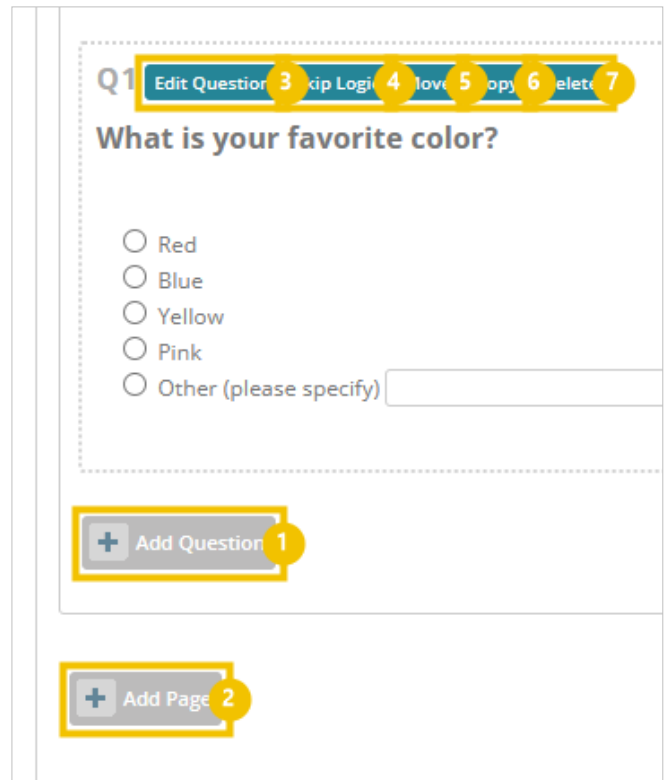


Save & Close Cancel

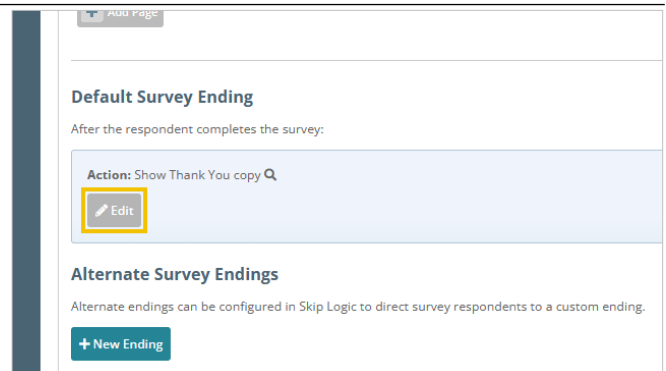
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You can include multiple questions on the same page and also add additional pages to your survey to spread out your questions and take advantage of skip logic.

1. **Add Question:** Add another question to your survey.
2. **Add Page:** Add a new page to your survey.
3. **Edit Question:** Edit your question.
4. **Skip Logic:** Apply skip logic (available only on certain types of questions).
5. **Move:** Move your question up or down on your survey or to a different page.
6. **Copy:** Make a copy of your question which you could then edit.
7. **Delete:** Delete your question.

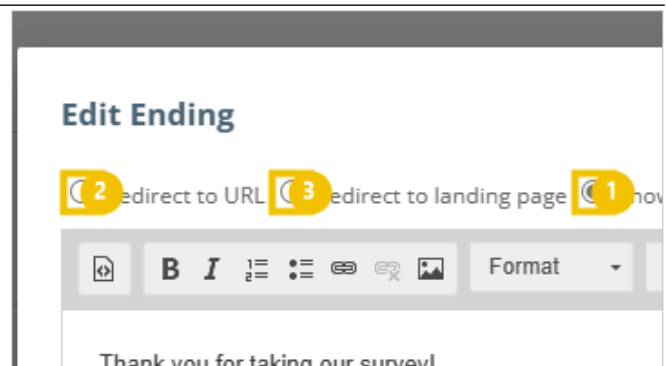


To edit the ending of your survey, what someone will see after completing the survey, scroll down to find Default Survey Ending and click **Edit**



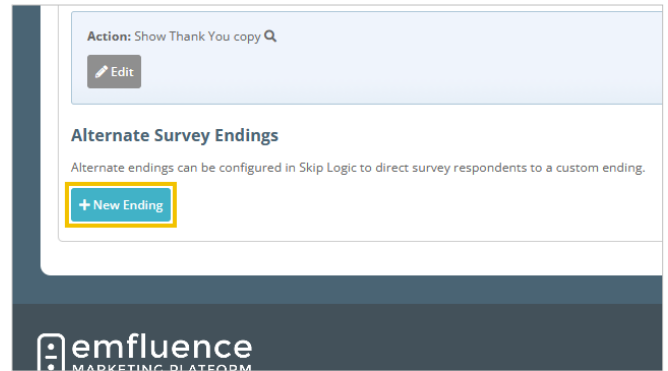
Here you can edit the default thank you text of your survey or choose an alternate location to send your survey takers.

1. **Show Thank You copy:** The default choice is to show the thank you copy you will write here. You can edit the text, add images, etc. using the editor. Remember to save.
2. **Redirect to URL:** Rather than showing thank you copy, you can direct people to a URL of your choice.
3. **Redirect to landing page:** Rather than showing thank you copy, you can direct people to an emfluence landing page.

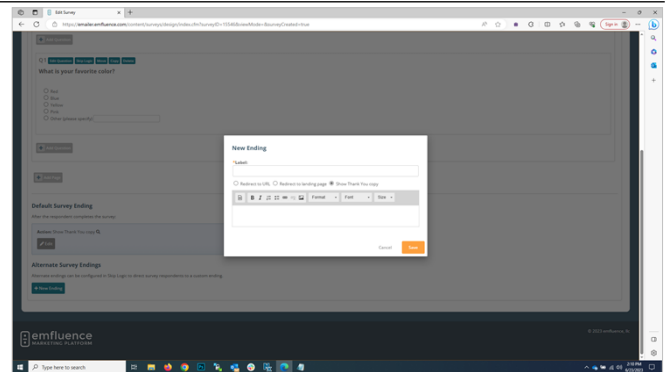


emfluence Help Section

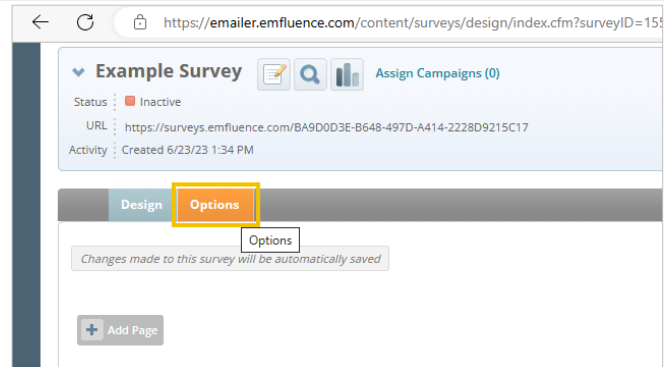
If you have used skip logic, you can create multiple survey endings and choose which one the survey taker will see based on their response to a specific question. To add an alternate ending, click on **New Ending**



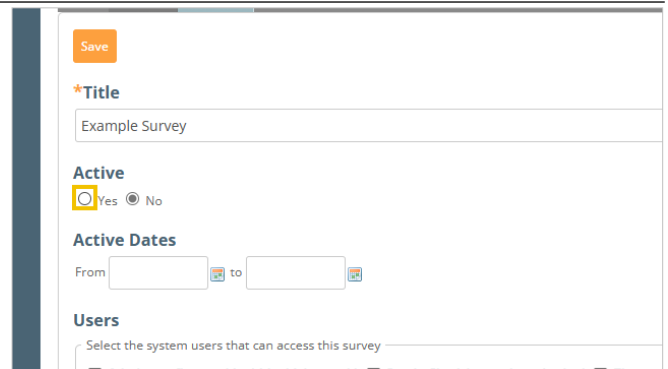
On your alternate endings you will be presented with the same options as on your default ending.



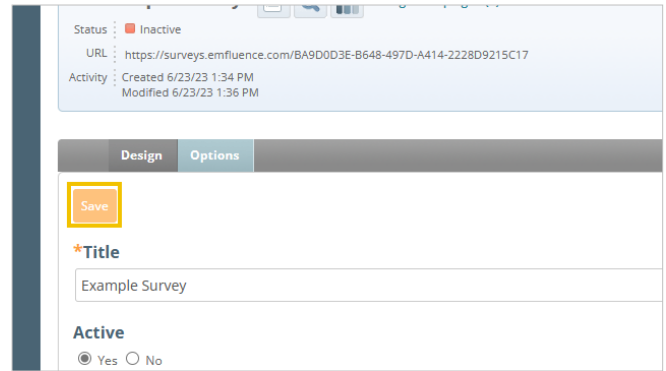
emfluence Surveys, Landing Pages, and Forms are all inactive by default. You need to activate them. To activate your survey, click on **Options**



Under **Active**, toggle the radio button to **Yes**

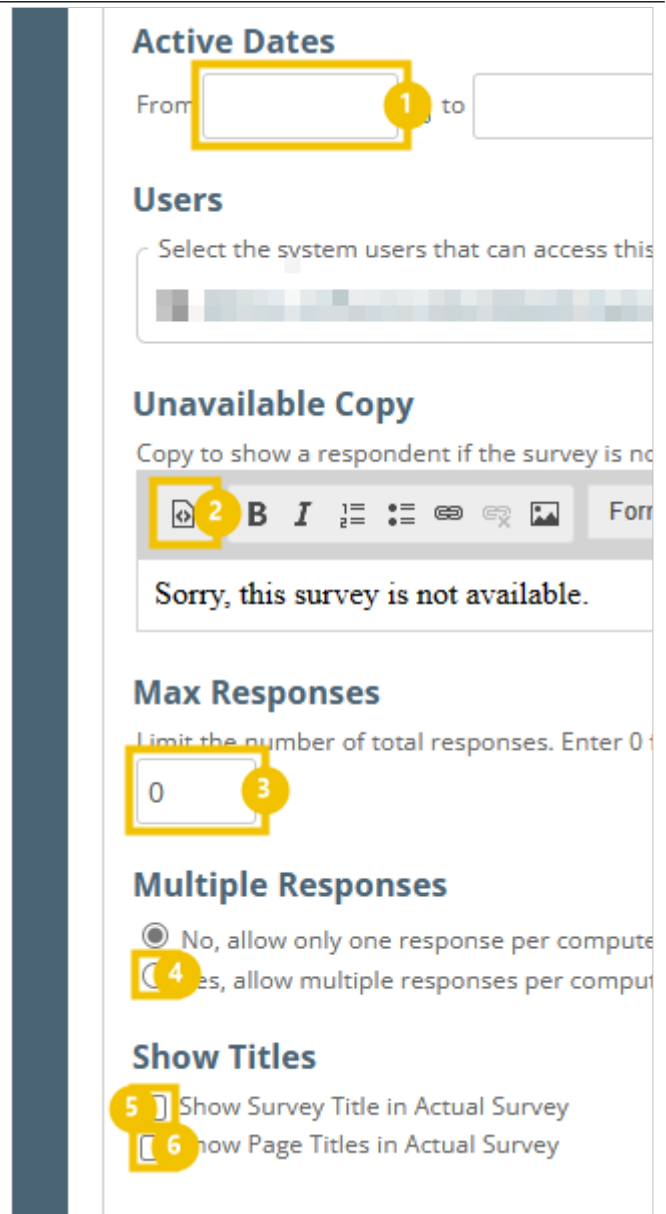


Click **Save**



Continue to edit the settings of your survey

1. **Active Dates:** If you want to control the active dates your survey will be available, you can put a starting and ending date into the Active Dates fields.
2. **Unavailable Copy:** If a contact visits your survey URL after it is deactivated, you can control what copy you want to show them here.
3. **Max Responses:** If you wish to limit your number to a set limit of responses, you can type a number here.
4. **Allow multiple responses per computer.:** The default allows only 1 survey response, but you do have the ability to allow multiple responses on the same computer.
5. **Show Survey Title:** Show survey title in the survey
6. **Show Page Title:** Show page title in the survey.



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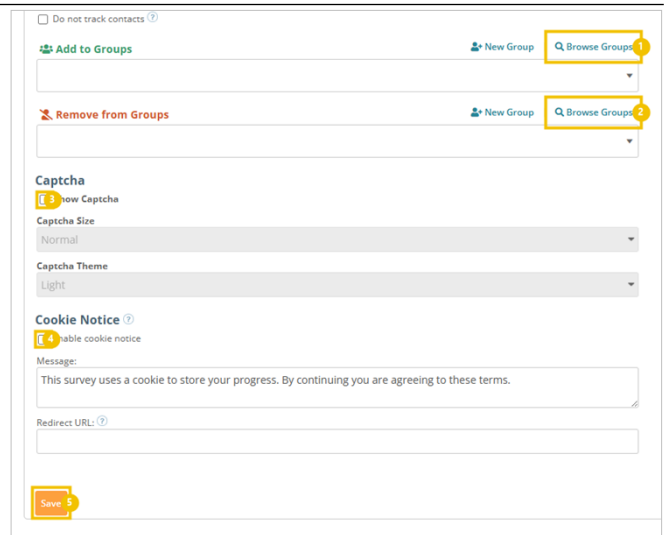
Continue to edit the settings of your survey

1. **Add Progress Bar:** You can add a progress bar at either the top or bottom of your survey.
2. **Theme:** Choose a default theme for your survey or edit the CSS yourself.
3. **Response Processing:** You can provide a URL for us to post responses via silent POST. You can send Survey Notifications to users who will receive them every time a survey is completed.



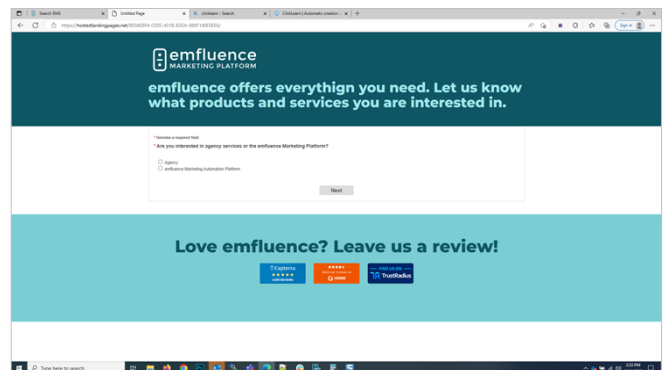
Continue to edit the settings of your survey

1. **Add to Groups:** Choose groups to add known contacts to after they complete the survey. Either type the name of the group into the input, use the Browse Groups button to search and find your group, or click New Group to create a new group.
2. **Remove from Groups:** Choose groups to remove known contacts from after they complete the survey. Either type the name of the group into the input, use the Browse Groups button to search and find your group, or click New Group to create a new group.
3. **Show Captcha:** Add a reCAPTCHA to your page. Choose between Normal and Compact and between Light or Dark themes.
4. **Enable cookie notice:** Enable cookie notice and edit the message you wish to show and where to redirect them if they decline.
5. **Save:** When you have finished making any changes to your survey, click save.



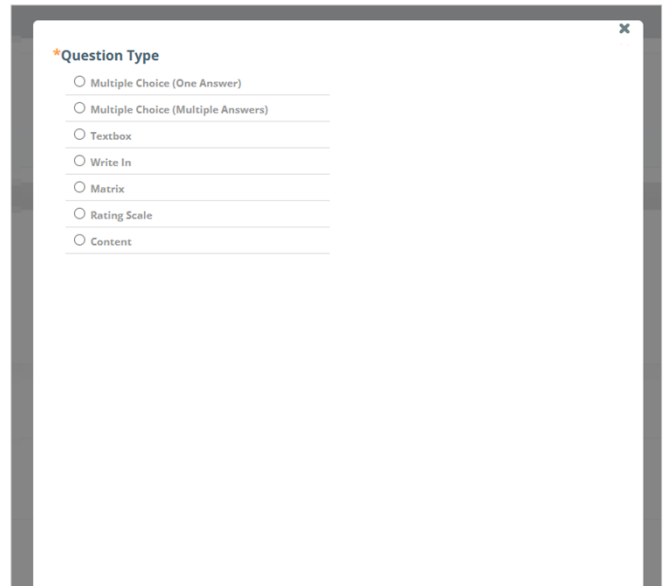
5.2. Survey Skip Logic

You can use skip logic to hide certain questions from contacts filling out your survey based on specific responses

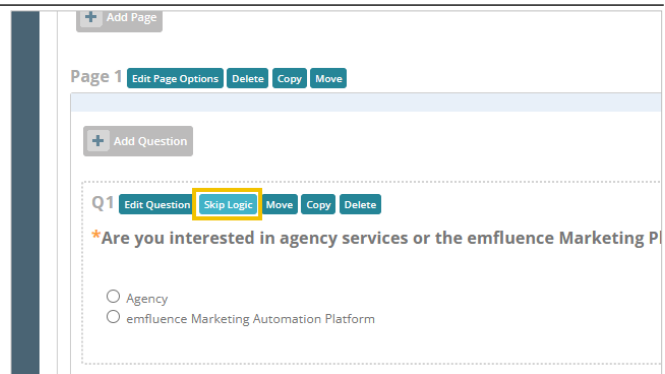


emfluence Help Section

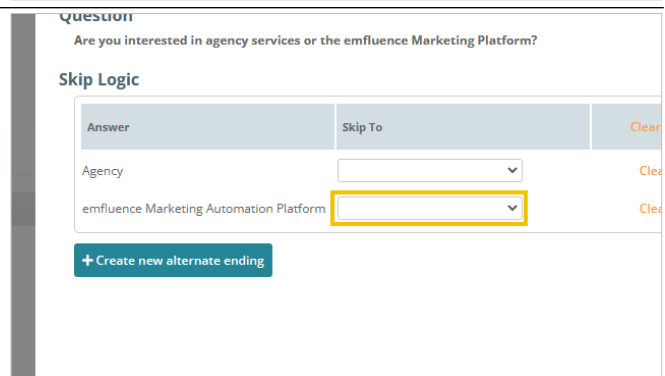
Certain question types such as Multiple Choice (One Answer) and Rating Scale can have Skip Logic applied to them



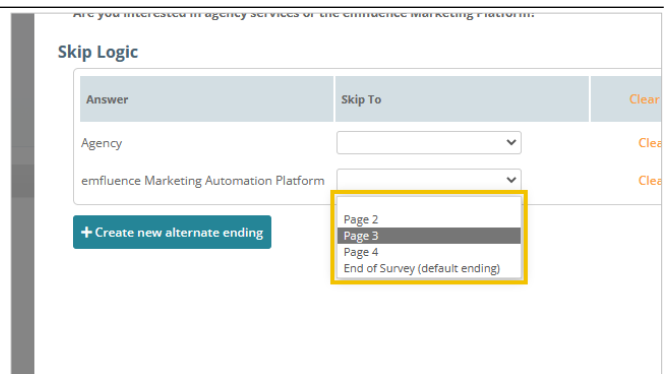
To apply on a specific question, click **Skip Logic**



For each answer listed, you can choose which page to skip the contact forward to based on that choice. This could be used to skip over questions that don't apply to them or take them to the end of the survey

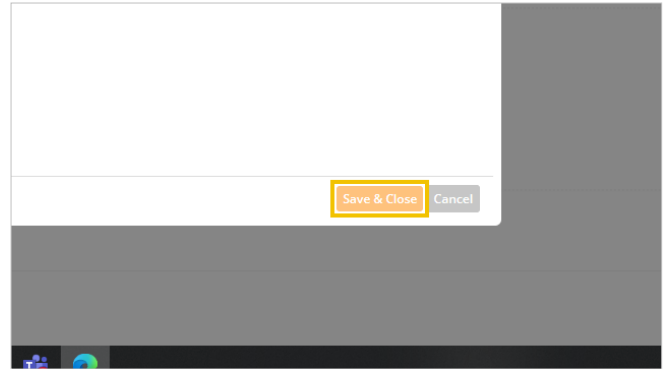


Select the page you want to skip to from the dropdown

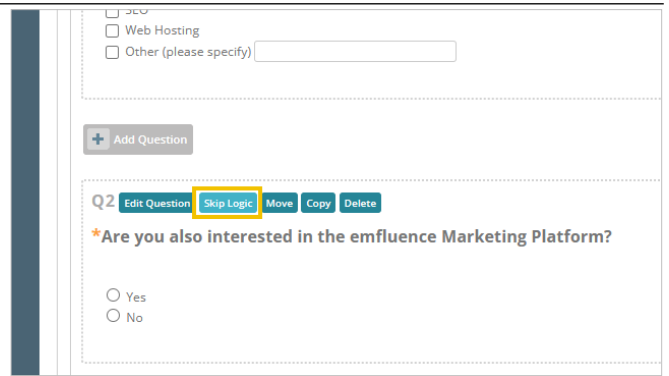


emfluence Help Section

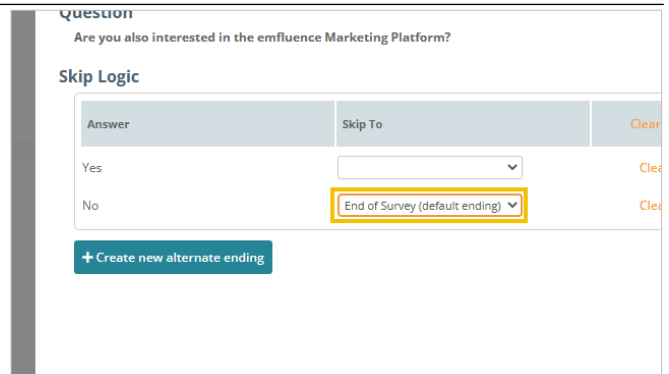
Click **Save & Close**



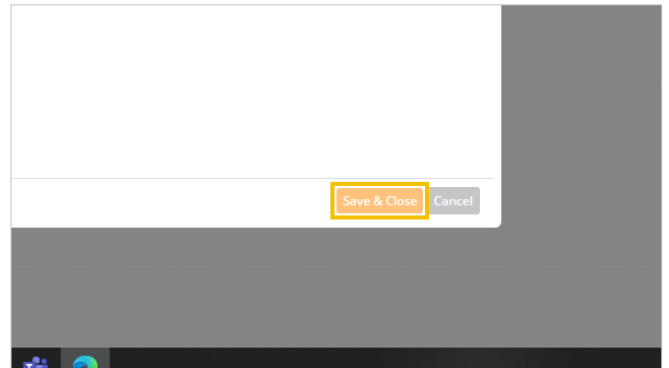
While only one question per page can use skip logic, you can apply it to multiple pages over the course of your survey. To apply it to a new question, click on **Skip Logic**



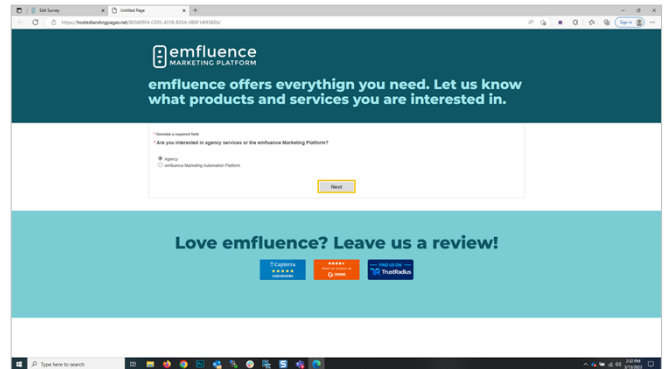
In this case we will select one of the options to advance to the end of the survey



Click on **Save & Close**



You can now test your survey by choosing an option and clicking **Next** to confirm your skip logic is working as intended

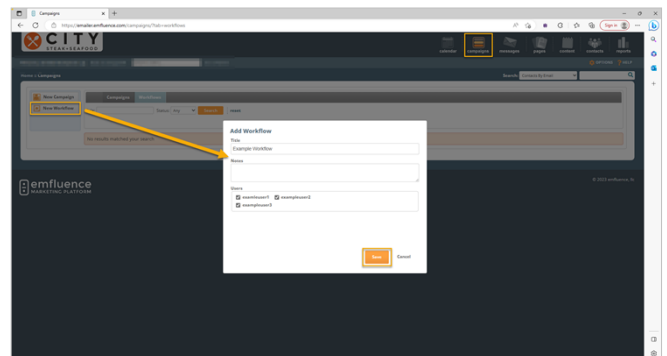


6. Workflows

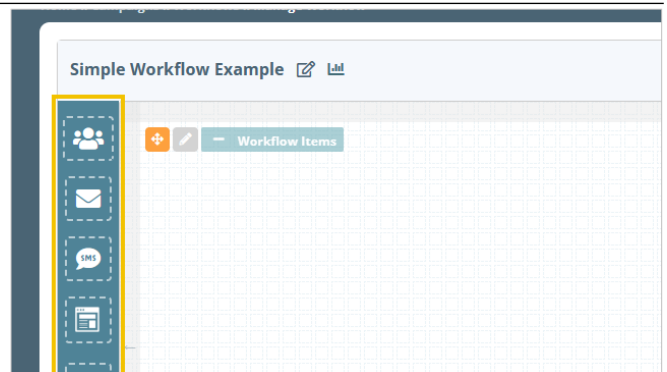
6.1. Create a Workflow

Create a new workflow by navigating to the **Campaigns** section and clicking **New Workflow**.

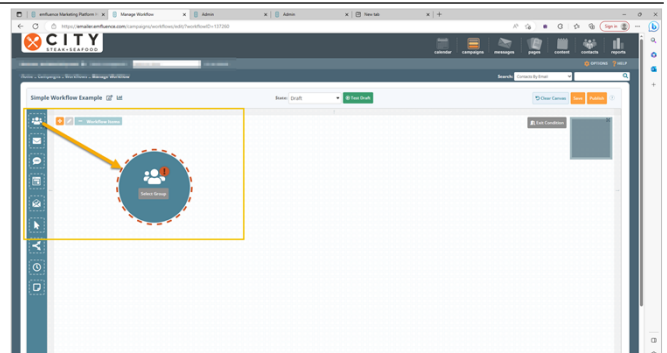
In the pop-up, name your workflow, assign any non-client admins access to the flow who need it, optionally add some notes about the flow, and click **Save**.



Elements (such as groups, emails, SMS messages, landing pages with forms, decisions, delays, and notes) can be dragged onto the canvas from the left sidebar.

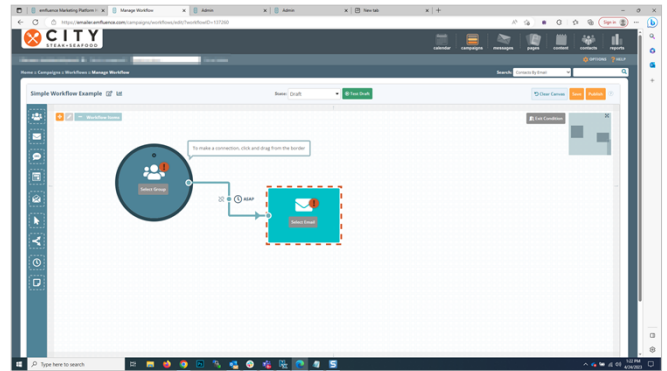


Workflows must start with a group (or, in the exception of a landing page submission, they can begin with a landing page with a form). Drag a group placeholder on to the canvas. Also drag out an email placeholder as well.

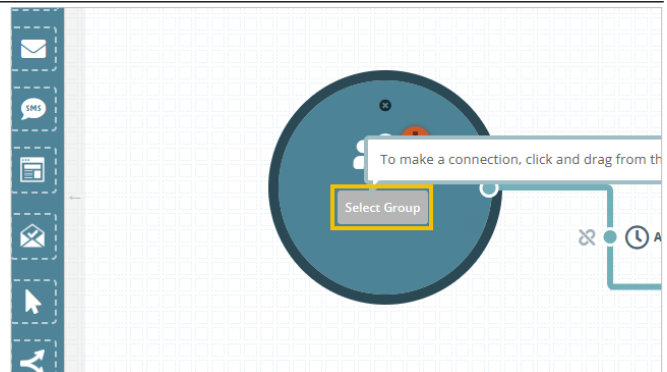


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By highlighting the edge of an element, you can drag a connection from one element to another, such as connecting a group to an email.

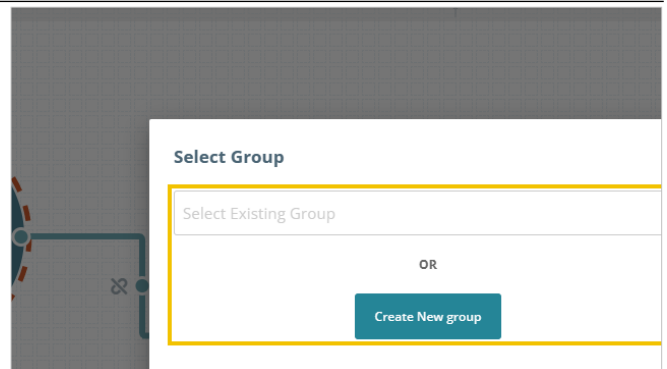


To fill in a place holder, click the **Select** link inside of it.

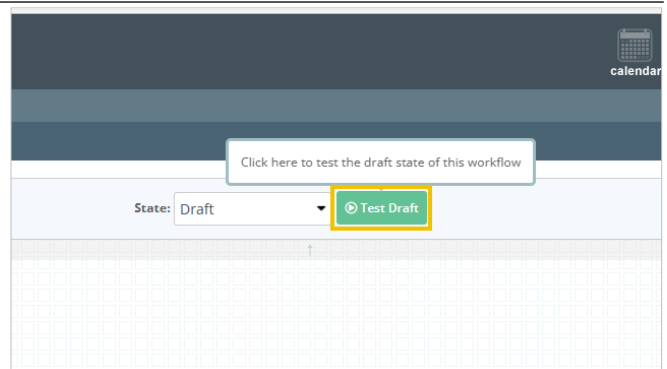


For both groups and emails, you can either assign something preexisting by selecting it from the list or create a new one for this workflow.

NOTE: Only automated emails can be used in workflows. Both a group and an email can only be used in a single published workflow at a time.

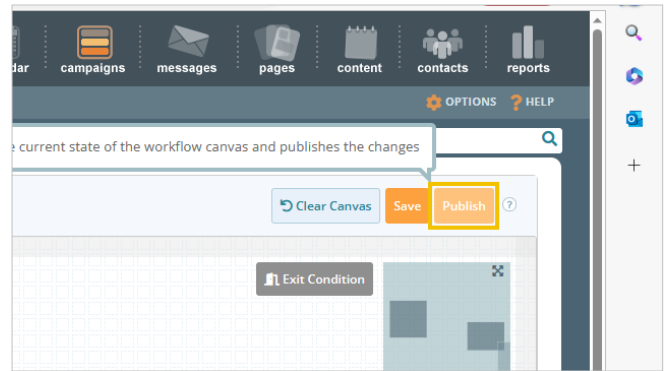


Using an example contact, you can test the workflow either before or after publishing it. In either instance, to properly test you will need all your elements connected and activated in order to test a contact's path through the workflow.

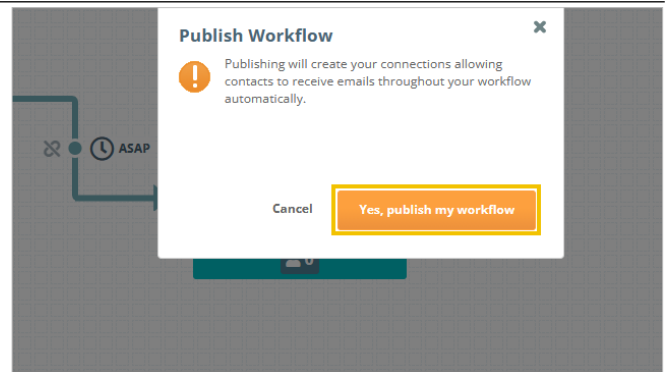


When you are ready to publish your workflow, you can click the **Publish** button in the top right of your screen.

NOTE: You can publish without all of your elements connected, and your flow would be live. However, if you do this, contacts could get stuck if they arrive at an element before it is active.

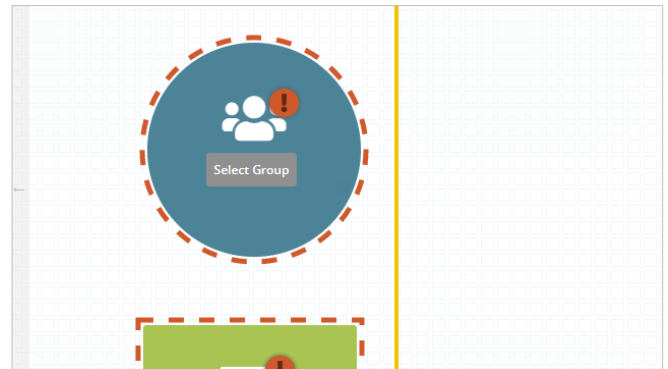


Confirm by clicking **Yes, publish my workflow.**



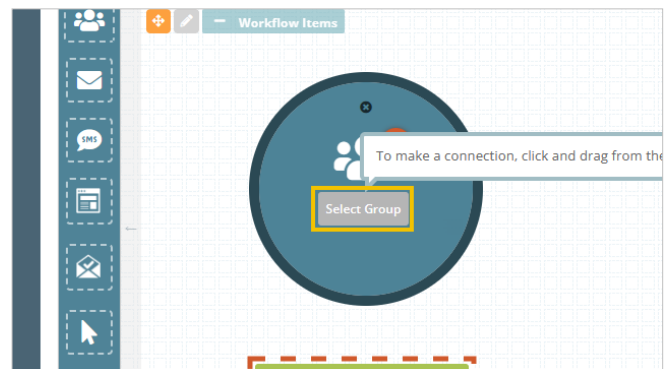
6.2. Workflow Nodes Overview

Workflows must start with either a **Group** (static or dynamic) or a **Landing Page** with a form (pages without a form cannot begin a workflow). Drag either the Group icon or the Landing Page icon from the left sidebar to create the first node on your workflow.



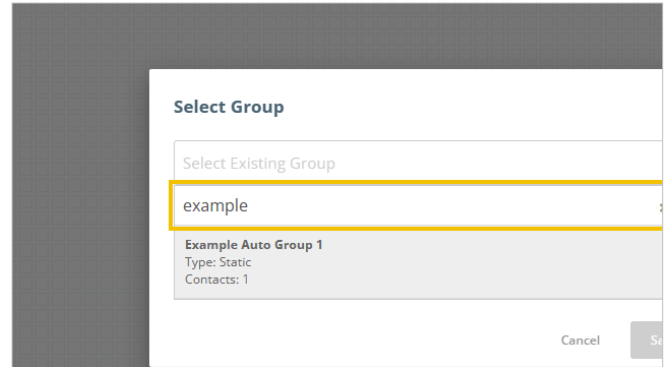
6.2.1. Groups

To start a workflow with a group, drag the group icon onto the workflow canvas and click **Select Group.**

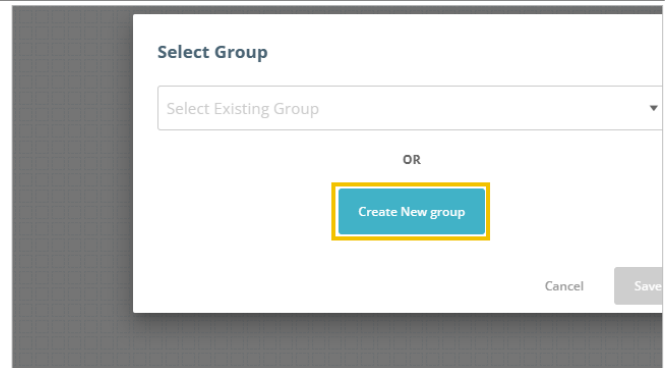


To choose an existing group, start typing the name of your group in the **Enter Group Name** field and then choose the group.

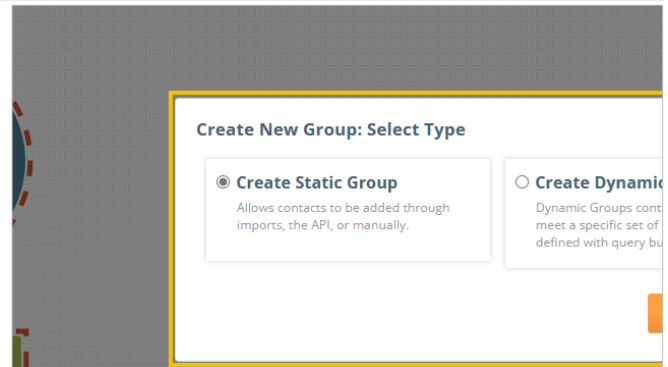
NOTE: Groups cannot be used in more than 1 active workflow.



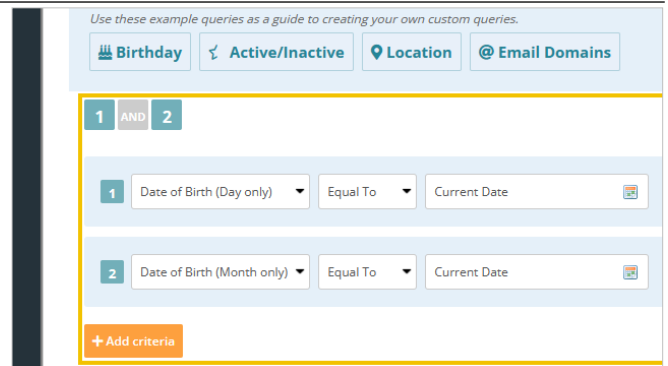
If you haven't yet created a group, click on the button **Create New group**.



You can either use a Static Group or a Dynamic Group. To choose your group type, click **Create New Group: Select Type** and then fill out the information on your group such as name, friendly name (if applicable), and manage permissions.

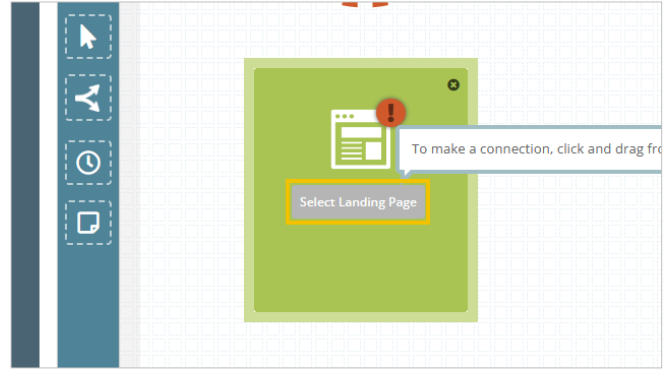


If you choose a **Dynamic Group**, you will need to create a query. Unlike a static group which is fed manually, a Dynamic Group adds and removes contacts based on the query. The most common type of Dynamic Group is a birthday group. The people matching each day will be different based on who matches the query at the time it runs.

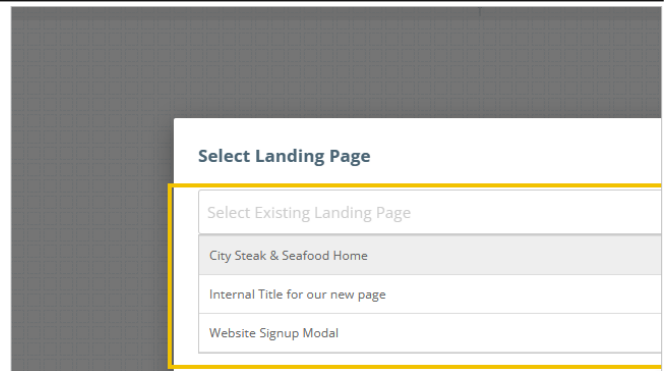


6.2.2. Landing Pages

Other than a group, the only way to start a workflow is with an emfluence **Landing Page** with a form. If included in a workflow, when someone fills out a form, that can kick off a workflow. (Alternatively, if the form adds someone to a group, you could also use that group as a starting point). Drag a Landing Page from the sidebar and click on the button **Select Landing Page** to choose the page you wish to use.



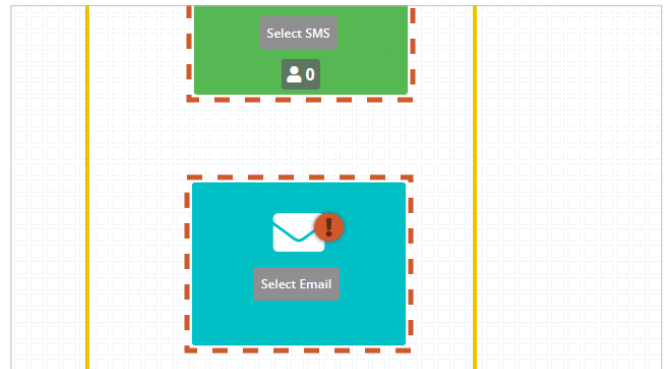
You can either **Select Existing Landing Page OR Create New Landing Page**. If the page exists, type the name and choose it from the dropdown. If it doesn't yet exist, click the button to **Create New Landing Page**.



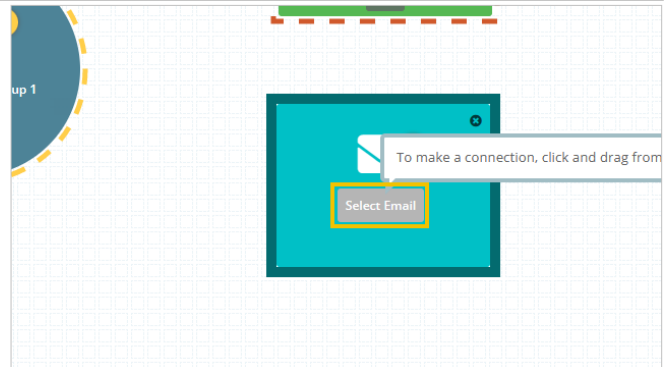
6.2.3. Messages

There are two different types of message types which can be added to the workflow. These are **Automated Emails** and **Automated SMS Messages**.

NOTE: SMS must be enabled in your account for you to send SMS messages.



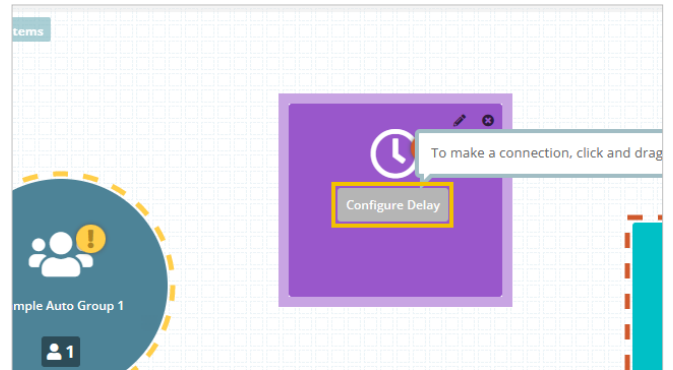
As with Groups and Landing pages, you can click on **Select SMS** and choose an existing SMS message or create a new one. For emails you can click on the button **Select Email** to choose an existing email or create a new one.



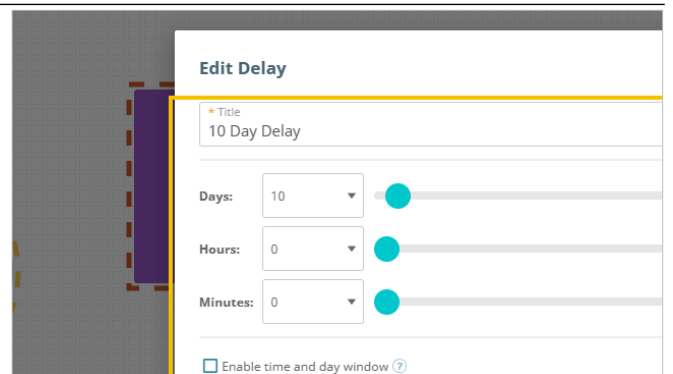
6.2.4. Delays

Delays can be added to the canvas and put between other nodes for contacts to wait for a period of time before advancing to the next step. Delays can either be based on a specific number of days, hours, and minutes or can be based on a schedule. To use a Delay, drag the icon from the right-sidebar and click **Configure Delay**.

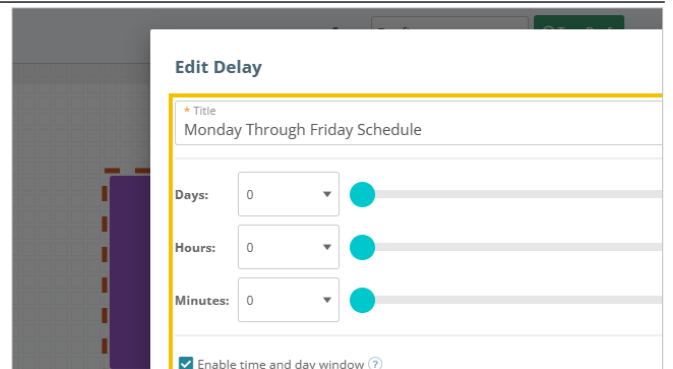
NOTE: Delays can also be enforced on the email itself. However, we suggest using the delay nodes to make it easier to see contacts being delayed. When feeding a message with a Dynamic Group you will need to enforce the delay on the email rather than using a Delay node.



To set a time delay, name your delay and pick the days, hours, and/or minutes you wish for contacts to wait before advancing.



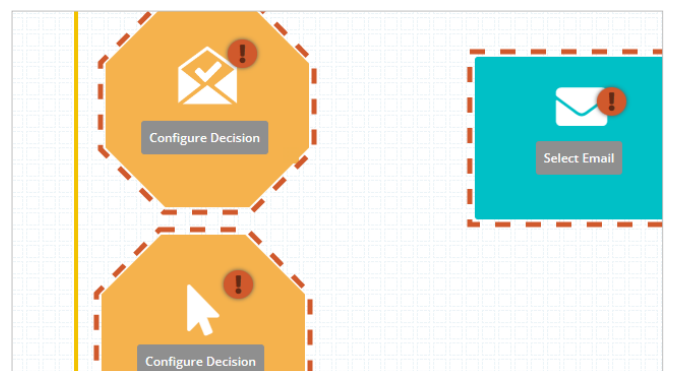
To set a schedule on a Delay, expand the Time and Day Window by checking the box and set the days and timeframes you wish emails to be delivered. Anyone being queued up outside of these timeframes will wait.



NOTE: If you use both day, hour, and minute delays and then also a schedule be aware that BOTH apply, first the number of days and then the schedule.

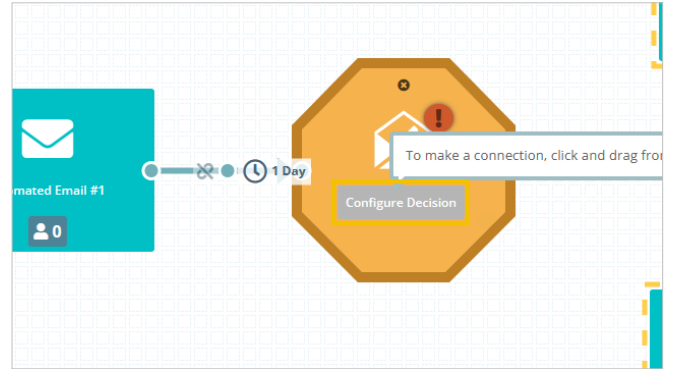
6.2.5. Decisions

Decisions can be used to split contacts down separate Yes and No paths. You do not need to use both a Yes and No path for every decision. For each type of decision, you will need to choose the time allotted to allow someone to match the decision and choose whether to advance Yes path when they match or on the same schedule as your No path.

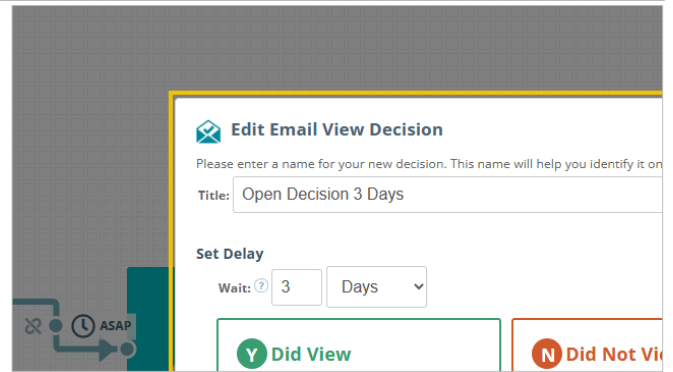


6.2.5.1. View Decisions

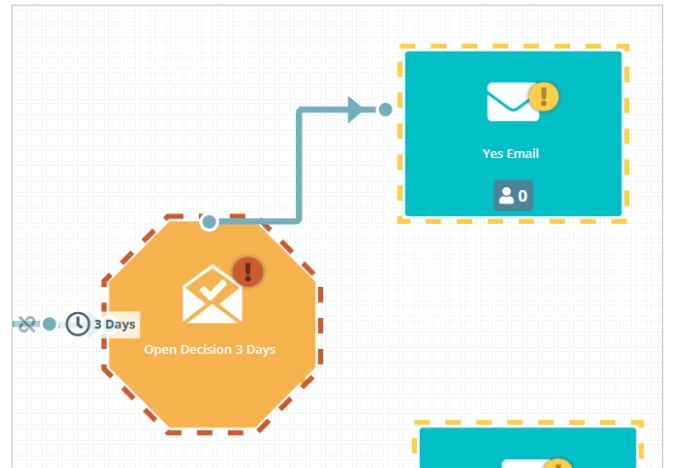
Choosing a **View Decision** will allow you to split contacts based on whether or not they opened the previous email in the time allowed. Create your preferences by clicking **Configure Decision**.



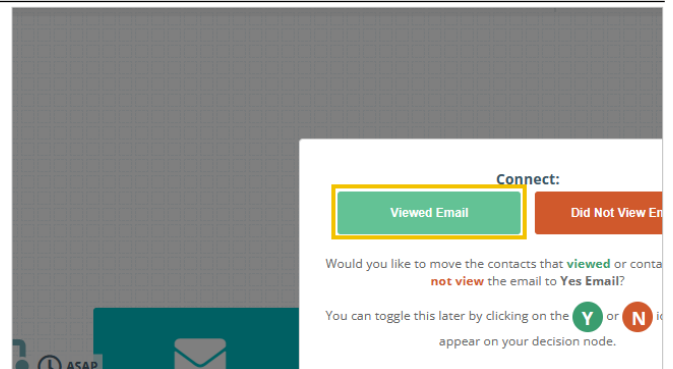
On the **View Decision**, set your title, set the period of delay in which someone has a chance to open (if they don't open by the time this period expires they are no longer eligible), and choose whether or not to advance the Yes path openers to the next step immediately or keep them on the same cadence as the No path.



To connect the decision to an email or group, starting with the outer border of the decision, drag a line to the next node.

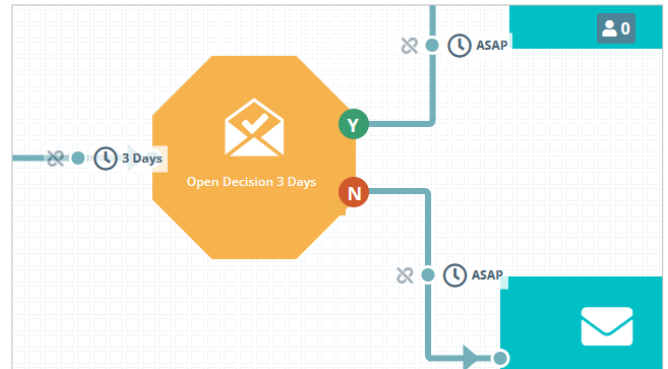


After connecting you will be given a menu to choose a Yes or No path. For the Yes path, click **Viewed Email**.



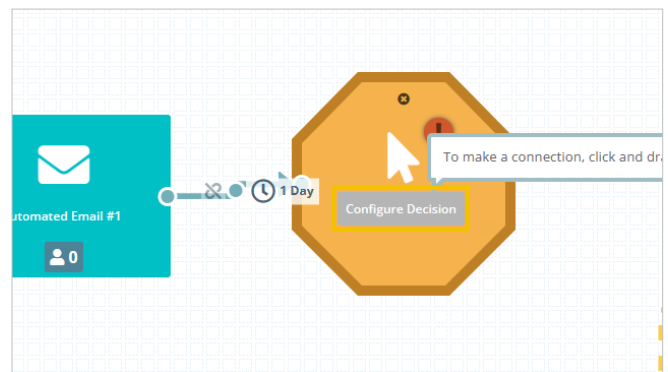
You can then connect the other half of your decision. And now you have two distinct paths.

Reminder: You don't have to have both a Yes and No path for every decision. However, if one of those paths is ending, for example the No path, emfluence suggests ending in a group so you have a list of people who ended their journey at that step.

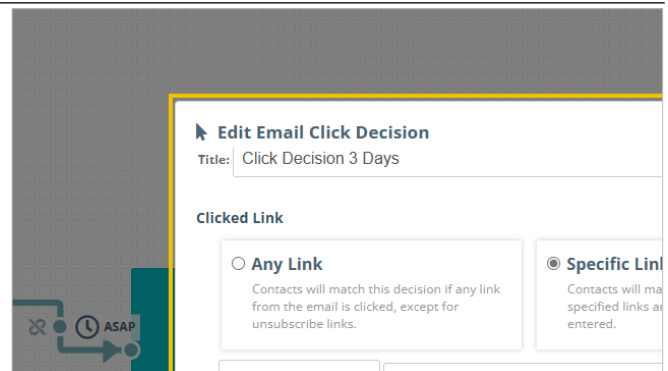


6.2.5.2. Click Decisions

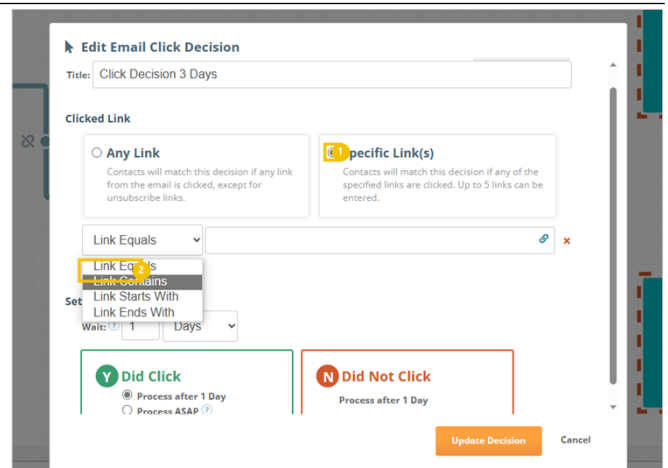
Click Decisions work similarly to View Decisions but instead of an email being opened and viewed within a set timeframe, the decision is looking for whether one or more links were clicked. To set a Click Decision, connect the email to the decision and click **Configure Decision**.



Click on **Edit Email Click Decision** to set your options. You can either choose Any Link (this includes all links except the Unsubscribe link, including header and footer links such as social links) or a Specific Link.



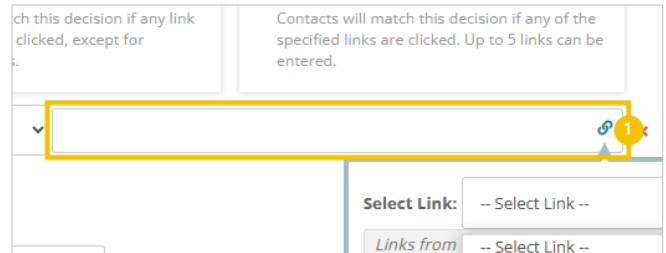
When choosing a Specific Link, you will be given a menu to choose from the previous email. If you decision isn't connected to an email with links, this menu will not populate. First, choose how to identify the link. Because links can be altered, we suggest choosing Link Starts With or Link Contains, rather than Link Equals.



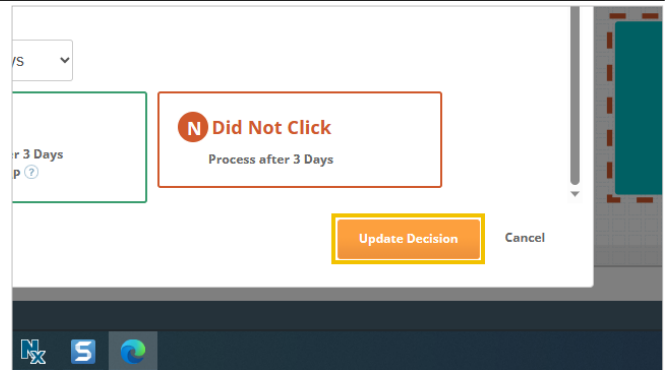
1. **Specific Link(s) Contacts will match this decision if any of the specified links are clicked. Up to 5 links can be entered.:**
Choose Specific Links
2. **Edit how the link is found:** emfluence suggest suing Link Starts with or Link Contains

Then, from the menu provided, choose a specific link.

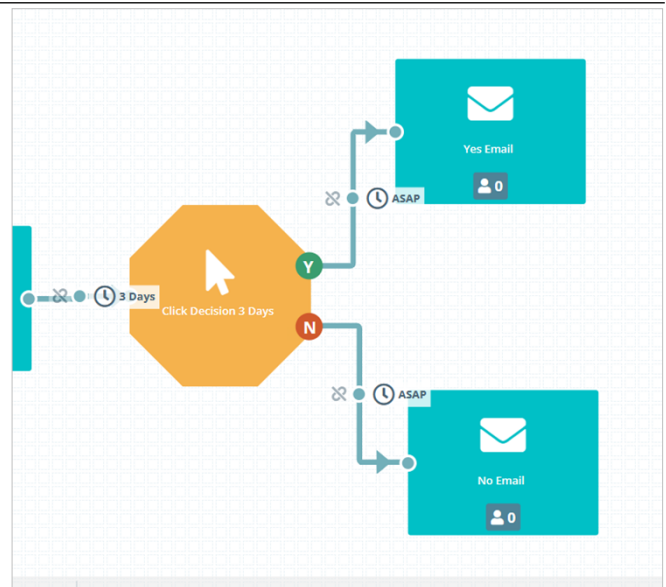
1. **Select Link:** Use the dropdowns to select a specific link from those found in the email connected to your decision.



After setting you delay time, click on the button **Update Decision**



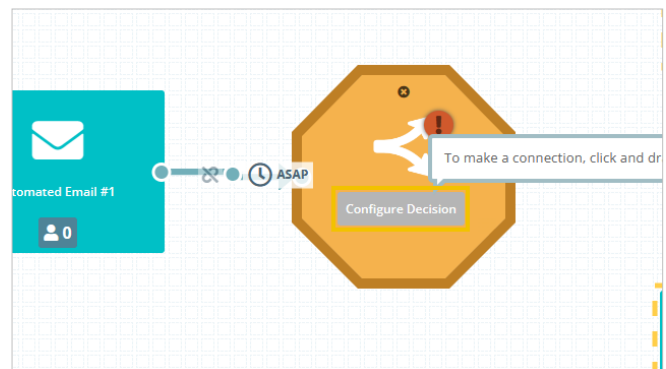
Then connect your Click Decision in the same manner you did the Open Decision.



6.2.5.3. Custom Decisions

Unlike Open or Click Decisions, Custom Decisions look at the contact record (the work in much the same way as dynamic groups using a query of to meet the set criteria) rather than interaction with a single email. Because of this, they do not have to immediately follow an email.

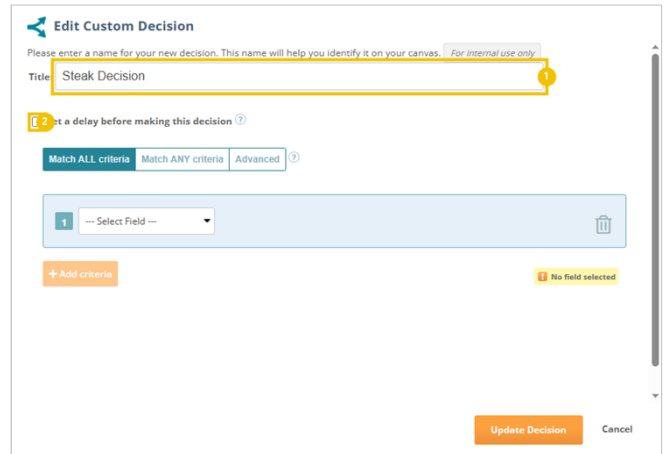
After dragging it onto the canvas and connecting the preceding email to it, click on the button **Configure Decision**



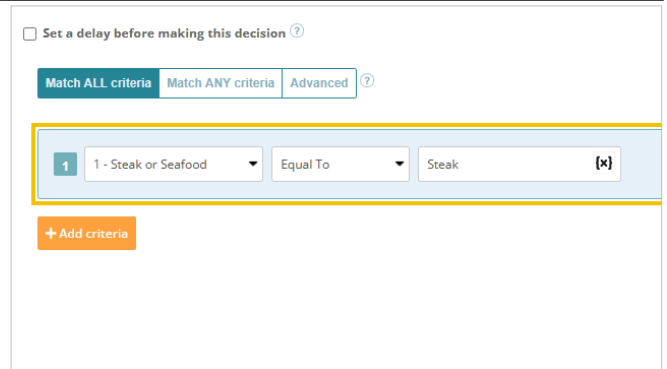
emfluence Help Section

As with the other types of decisions, first name your Custom Decision. Custom Decisions don't need to have a delay by default (as you aren't providing time for a contact to open or click), however you can still apply a delay if you wish.

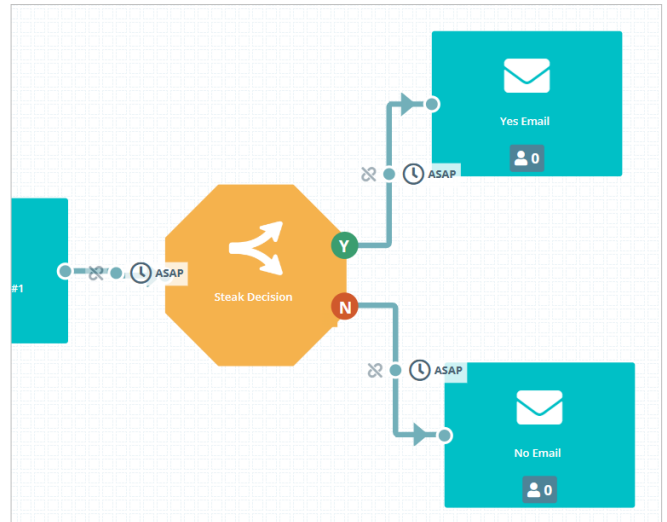
1. **Title:** Add a title to your decision
2. **Delay:** Optionally, you can choose to set a delay for a custom decision.



Use the menu to create the query you wish to match in your custom decision. As in Query Builder, your query can include multiple pieces in either an ALL or ANY format. When finished, click **Update Decision**.

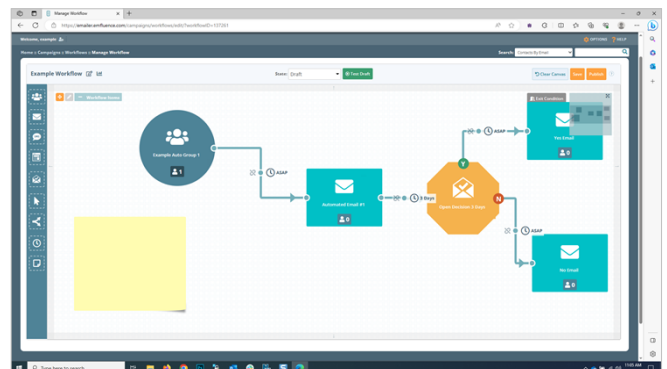


Then connect your Custom Decision in the same manner you did the Open Decision and Click Decision.



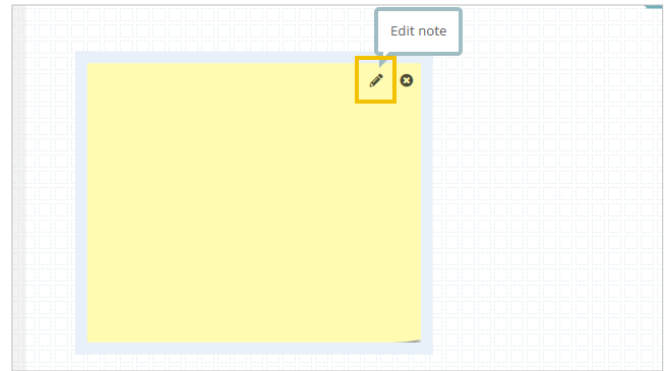
6.2.5.4. Notes

Although Notes do not interact with your workflow, you can add them to provide information and context about the purpose of your workflow.

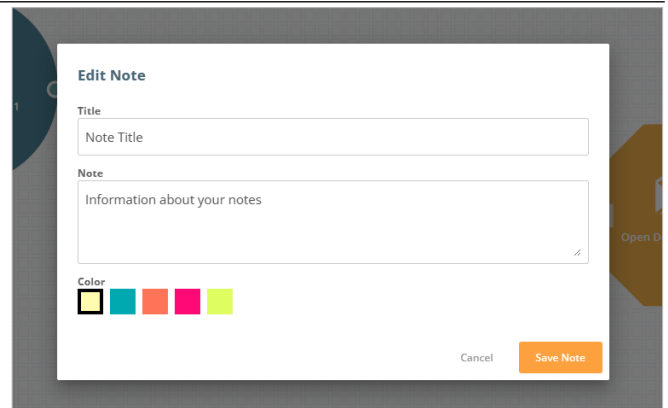


emfluence Help Section

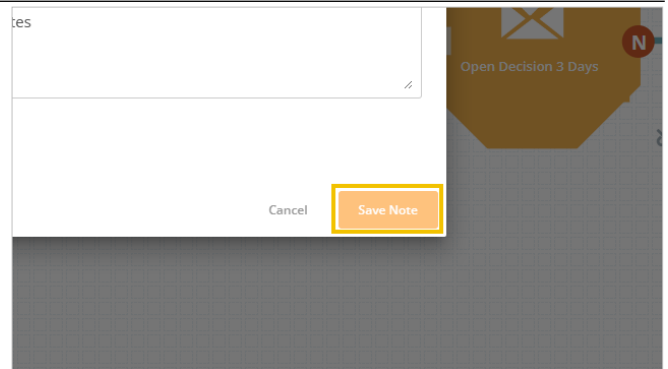
After dragging out a Note, you can edit by clicking on the pencil icon to **Edit note**.



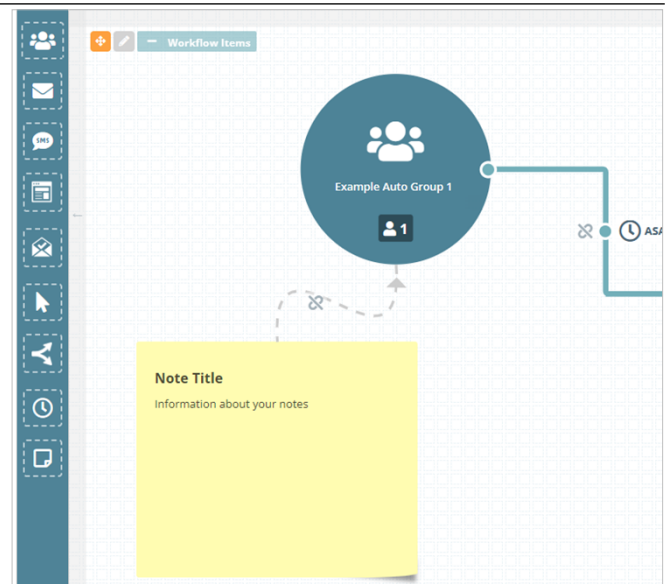
You can add a Title to your note and provide further information within the Notes section. You can also change the color of your note.



When finished, click on the button **Save Note**.

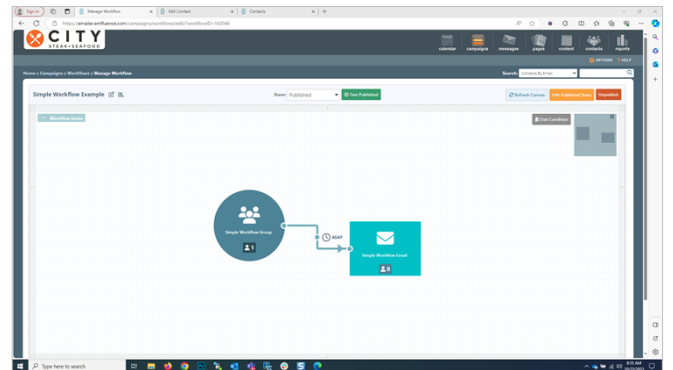


You may be creating notes for the overall workflow. However, if you are creating notes for one specific node you can connect that note to the node by dragging a connection between them. The connection has no active effect on the node, it only shows a relationship between them.



6.3. Adding Contacts to Workflows

The natural way for contacts to get added to a workflow are to be added to the starting group or fill out a landing page form submission that kicks off a workflow. If your group is a dynamic group, the query itself will decide who gets added. Only contacts matching a dynamic group's query will be added to a dynamic group.

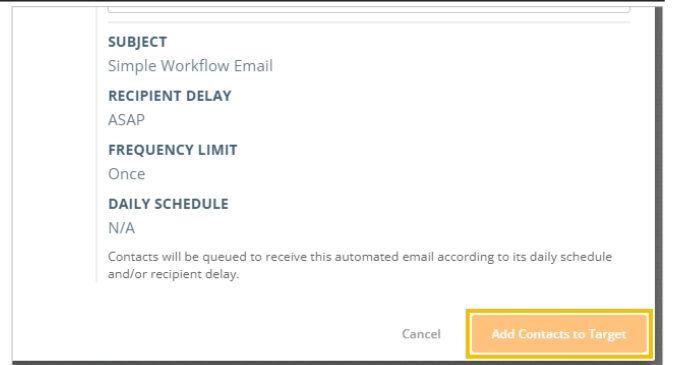


The trigger for adding someone to a workflow is adding them to the starting group. If contacts were already in the group prior to you publishing your workflow, there is no trigger to push contacts into the flow. However, you can click the **Advance** button and advance the contacts to any point within the flow. Contacts added after publication will process naturally.



Choose the spot in the workflow you want to add the contacts to and click **Add Contacts to Target**.

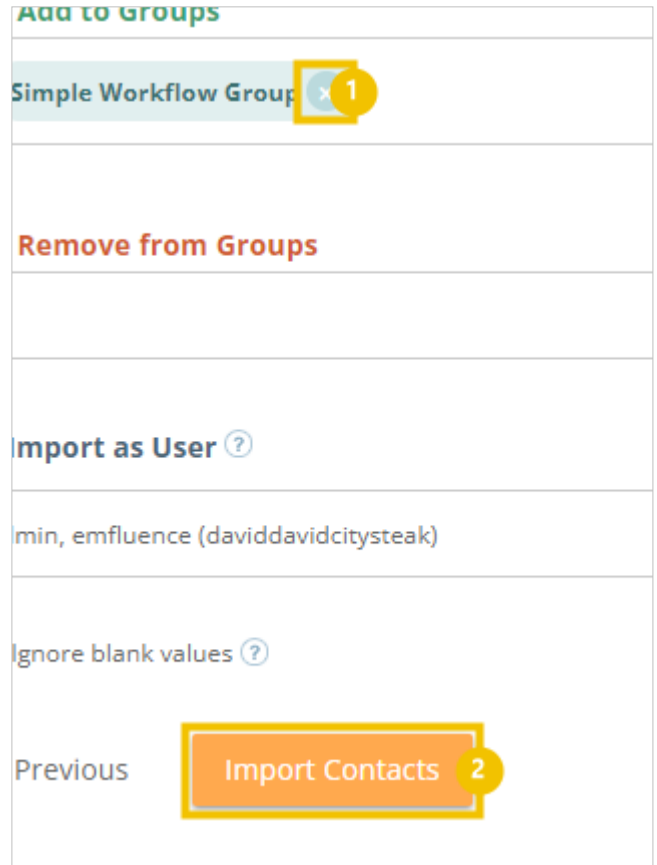
NOTE: All contacts in the starting group will be added. If you need to advance only some contacts, rather than the full list, see one of the alternate methods available.



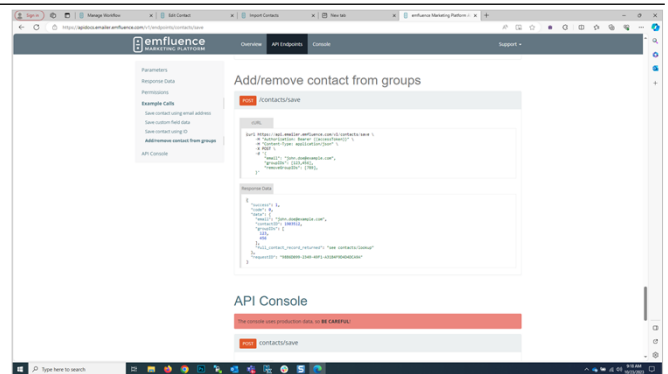
emfluence Help Section

The easiest way to bulk add contacts to a workflow with a starting static group would be by importing a list of contacts and adding them to the group. NOTE: Contacts already in the group cannot be readded without first being removed.

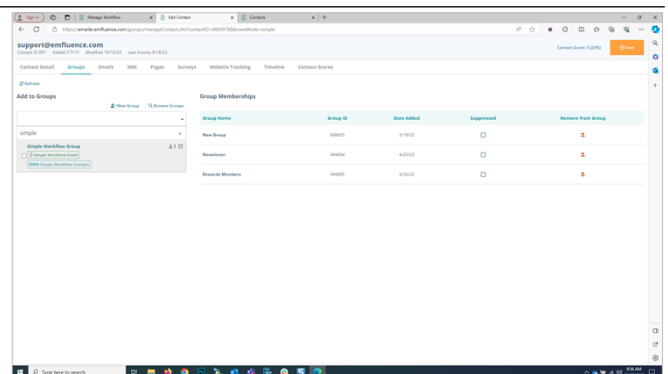
1. **Select Group:** Select the group you wish to add your contacts to.
2. **Import Contacts:** Import your list.



Contacts can also be added to groups through the emfluence API or through a secure FTP data sync.

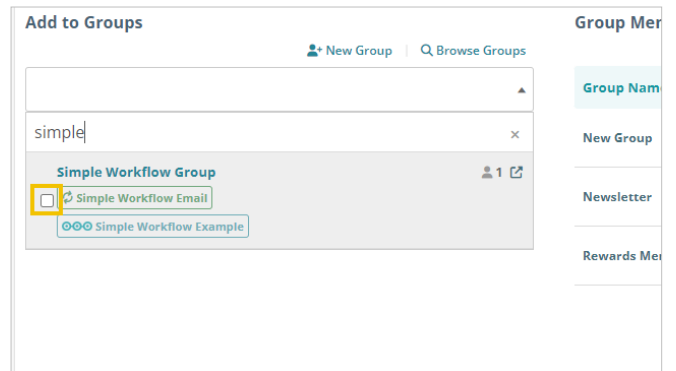


You can also add contacts to your starting group on the Group tab of a contact record. Use the search, or select Browse Groups, to find the group you wish to add them to.



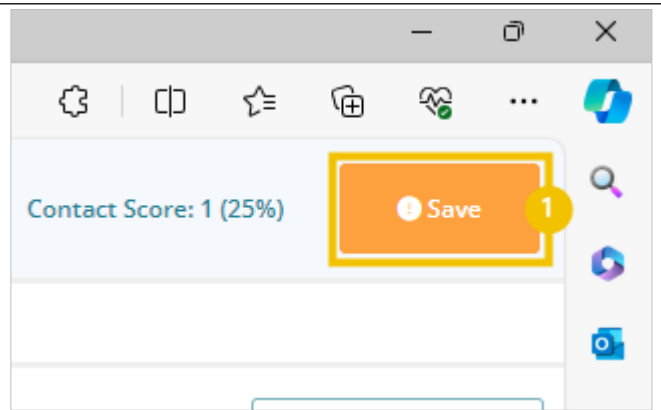
emfluence Help Section

If the group is connected to an automated email and workflow you will see those listed under the group name. Check the box to select that group to add the contact to.

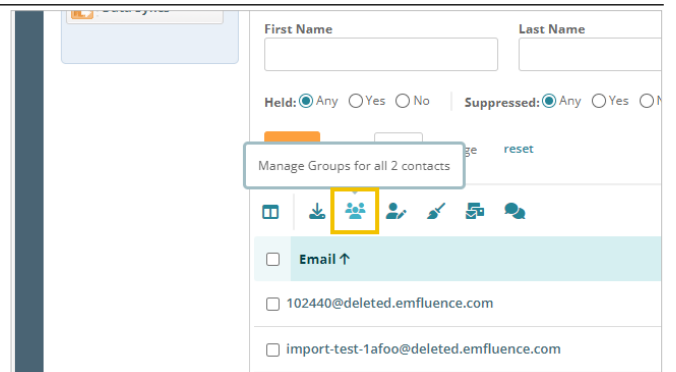


You will see a warning displayed at the top of the contact that they will be added to a workflow.

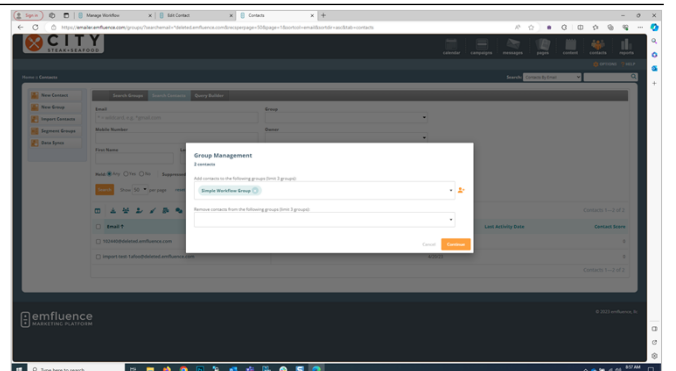
1. **Save:** Click to save your choice to add the contact to the group.



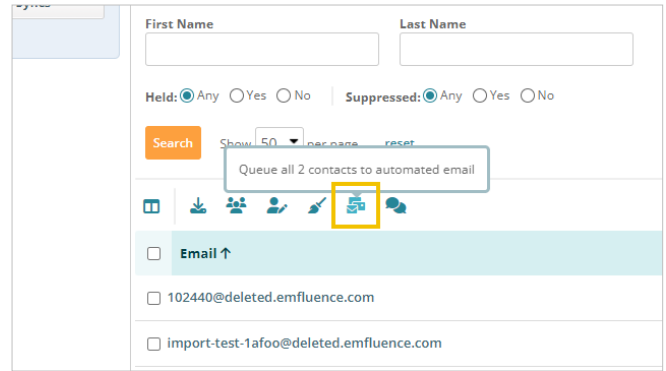
You can also add lists of contacts to groups by clicking the **Manage Groups** button above a list of contacts.



Then use the search to find your group and click Continue to add them to the group.

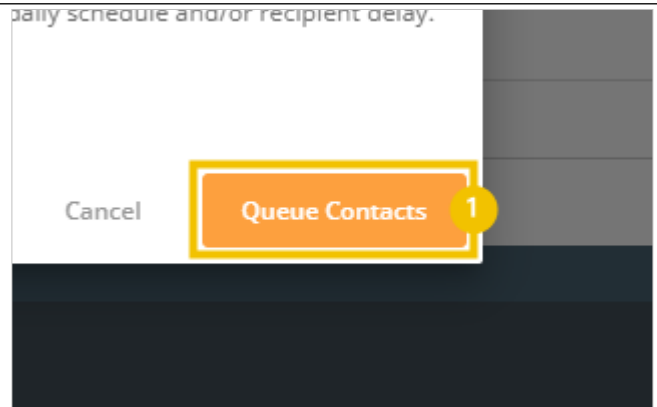


You can also use the **Queue** button to queue a list of contacts to an emfluence automated email (rather than adding them to the group). Click on the button to **Queue all contacts to automated email**.



Find the automated email from the search results.

1. **Queue Contacts:** Click the button to confirm you wish to queue this list of contacts to your automated email.



6.4. Add SMS to a Workflow

Like automated emails, automated SMS can be added to a workflow. Any contact hitting an SMS node without a number saved in the Mobile Number field will not advance. If not all your contacts have mobile numbers saved, and your flow continues past the SMS message, you may consider using a decision to allow those without mobile numbers to bypass the SMS node and continue.

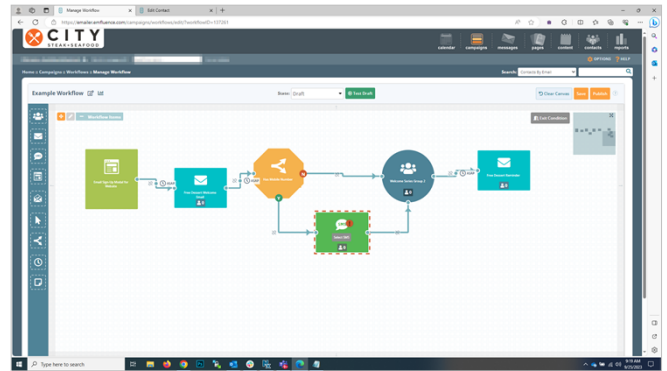


As with emails, drag an SMS message from the left sidebar onto the workflow canvas.

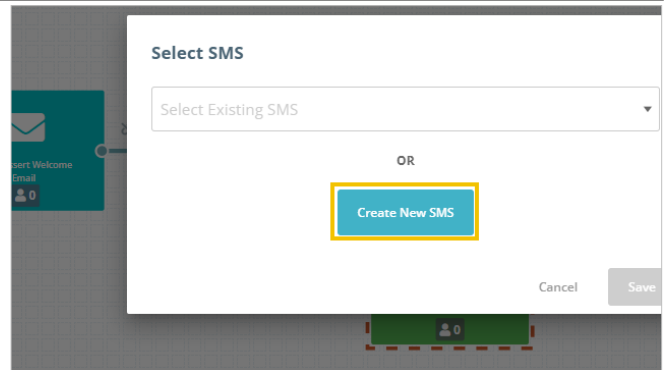


emfluence Help Section

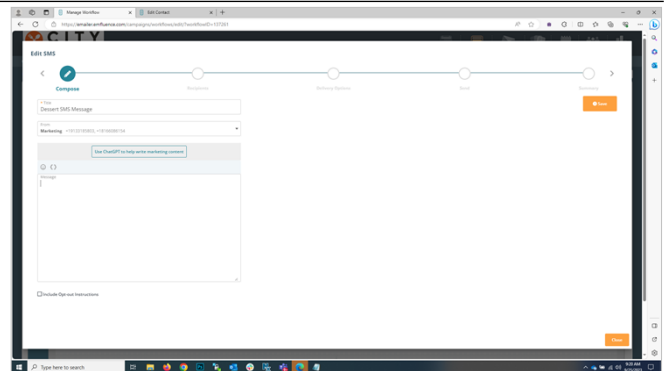
Connect the SMS message as part of your workflow.



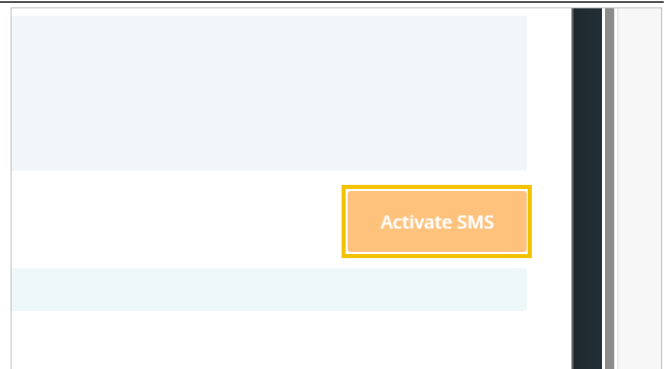
Either choose an existing automated SMS message from the dropdown menu or click on the button **Create New SMS**.



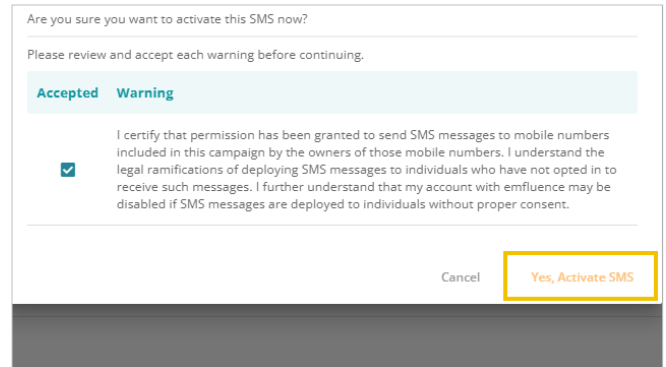
Compose your automated SMS just as you would a manual SMS message.



On the Send step, click on **Activate SMS**.



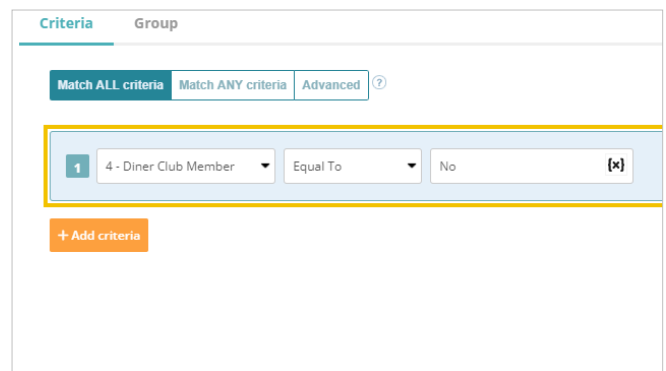
Confirm you have permission to send SMS to anyone added to this workflow and click **Yes, Activate SMS**.



6.5. Exit Conditions

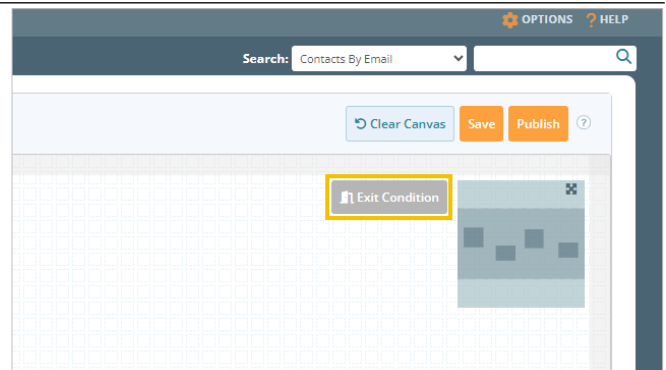
In Workflows, **Exit Conditions** can be used to insert a criteria to automatically remove any contact in the workflow (wherever they might be) when they match the condition.

One example for this would be a lead nurture campaign where a contact has converted and become a customer where you would no longer want them to receive future emails in the flow. Another would be when a status changes and they are no longer able to receive these emails.

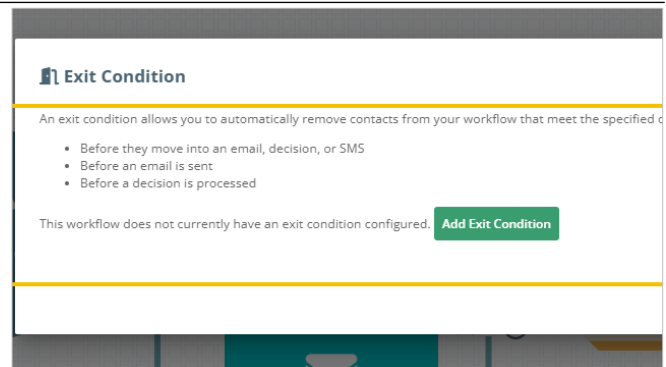


To enable Exit Conditions on a Workflow, click the **Exit Condition** button near the top right of the canvas.

NOTE: You cannot add or edit conditions on a published workflow.

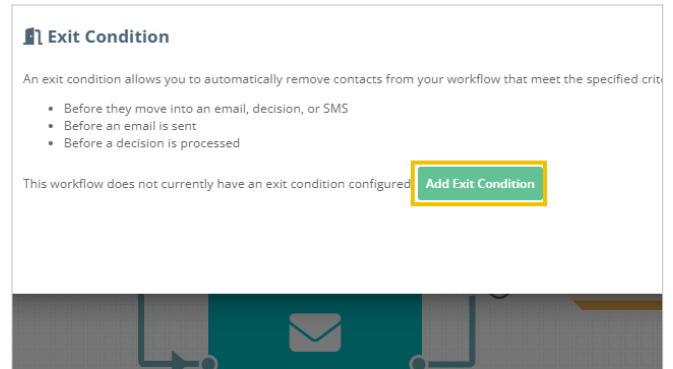


In the pop-up you will see examples of where contacts are checked for exit conditions. If they meet exit conditions at any of these points, the contacts will no longer advance in the workflow.

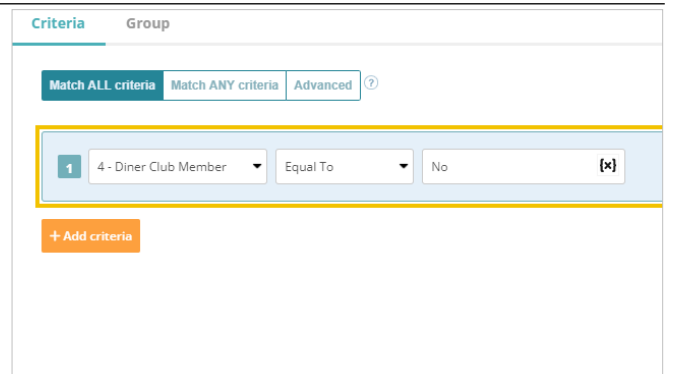


emfluence Help Section

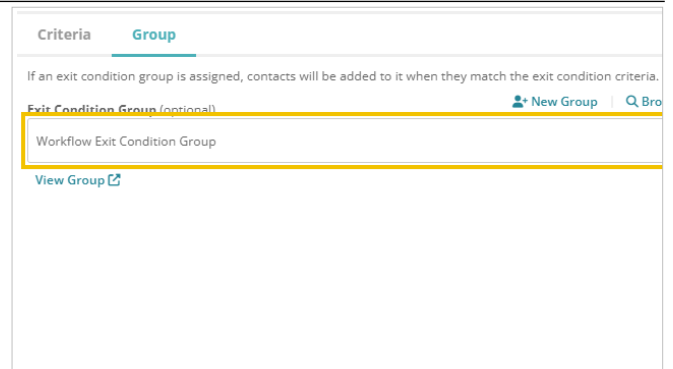
To add, click on the button **Add Exit Condition**.



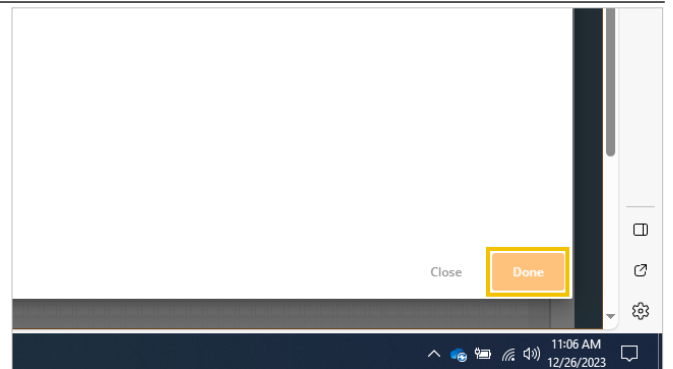
Create your query the same way you would in a Custom Decision or in Query Builder.



Exit Conditions will keep a list of contacts removed from the workflow. However, you may also want to have those contacts added to a static group which would easier allow you to identify them and, if you wish, market to them separately. To do so, click on the Group tab and add a group.

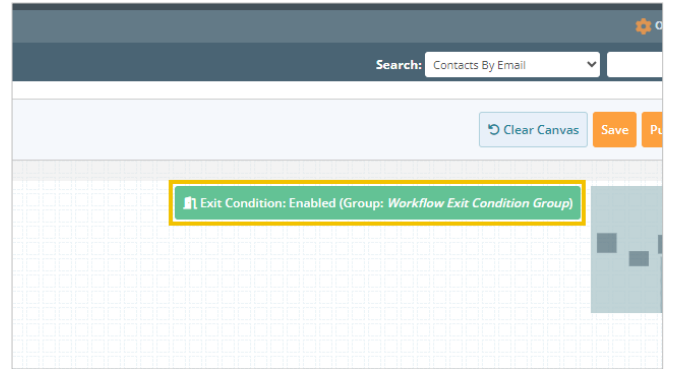


To finish, click on **Done**.

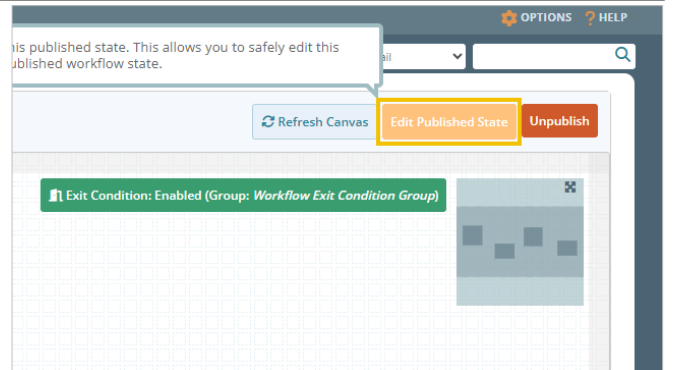


emfluence Help Section

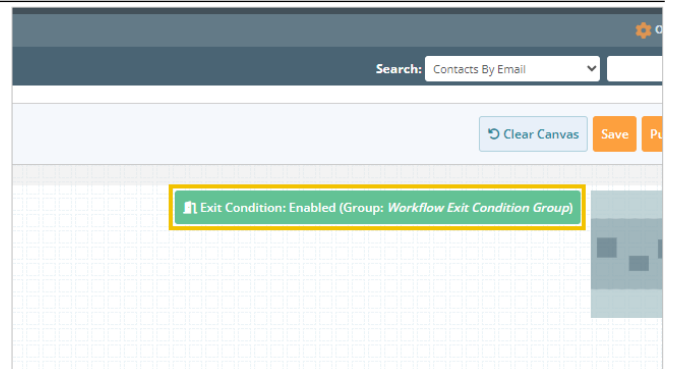
Once returned to the main workflow canvas, you will now see your Exit Condition displayed. Don't forget to publish your workflow.



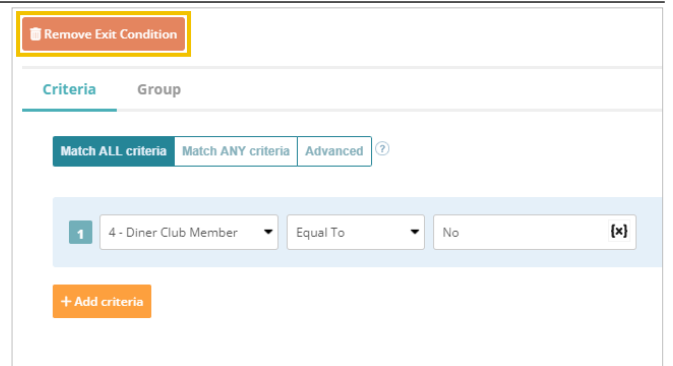
To add, remove, or edit Exit Conditions on an existing workflow, click either **Edit Published State**, which will create a new draft that you can then save over your published version, or **Unpublish**, which will unpublish your workflow.



Now in a draft state, you can access Exit Conditions by clicking on the button near the top right of the workflow canvas.



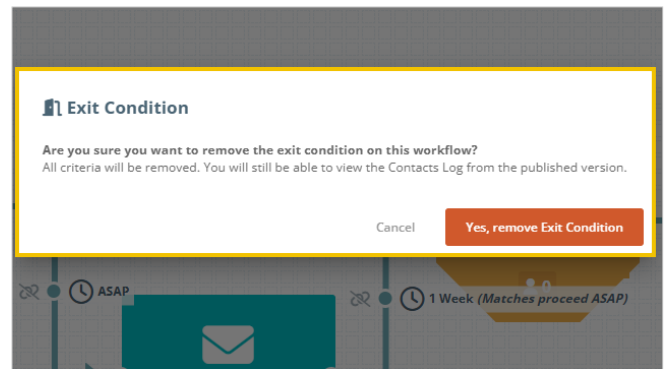
To edit your conditions, make any necessary changes to your query. To remove Exit Conditions, click on **Remove Exit Condition**.



If you have chosen to remove your Exit Conditions you will be prompted to confirm by clicking on **Yes, remove Exit Conditions**.

Once returned to the workflow canvas, don't forget to publish your changes.

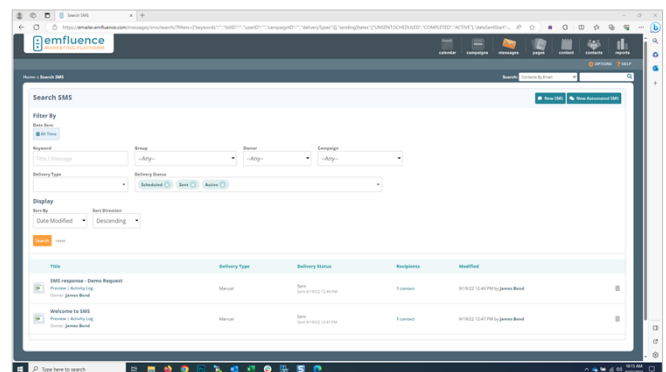
NOTE: Removing Exit Conditions will not affect those contacts already removed from your workflow.



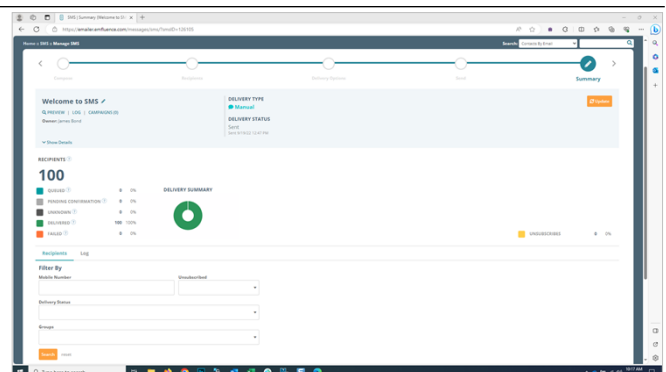
7. SMS

7.1. SMS Overview

emfluence uses Twilio's API to deploy SMS messages. All user actions take place within the emfluence Platform, similar to deploying manual and automated emails.



SMS Reporting offers a list of what messages have been deployed, what (if any) messages failed, and what messages are still being sent. If you are interested in SMS reach out to support@emfluence.com or your account manager.



If you are interested in sending SMS messages through your emfluence account, we'll need some information from you. Much of this will be given to us when you fill out the SMS Survey. We will also need a signed addendum to your contract in order to enable SMS within your account.

NOTE: With providers cracking down on spam, the process for getting approval can now take weeks to complete. If you are planning on adding SMS to your account we suggest starting early to get confirmed both on an account and campaign level well before the time you are planning to send.

Information to help you get started.

If you are ready to get started, here is the link to the SMS Survey: <https://more.emfluence.com/sms-survey>

You can find more about the information needed to set you up with a messaging service on Twilio here: <https://help.emailer.emfluence.com/needed-prior-to-sms-setup>

SMS Pricing

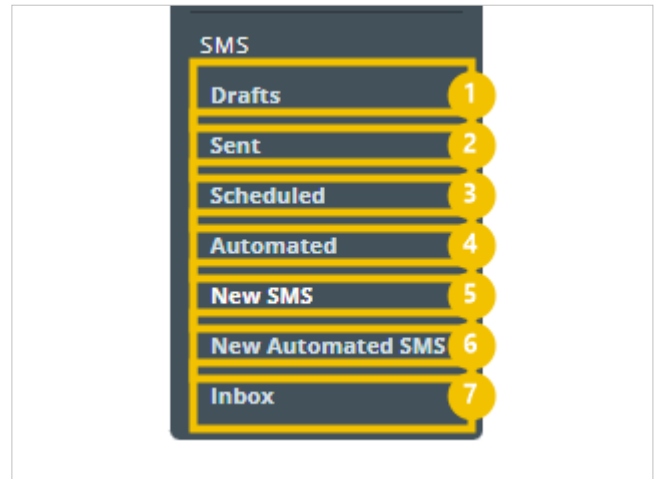
Pricing is subject to change based on fee charges from Twilio and individual SMS Carriers.

Monthly Minimum	\$50.00
Additional monthly charges:	
Local or Toll-Free Numbers per Line	(up to 2 lines provided in monthly minimum)
Messages Sent/Received Over Minimum	
Carrier Fees Per Message Over Minimum	
Monthly Cost Calculator:	
Phone Numbers:	
Local Numbers	1.20
Toll-Free Numbers	2.40
Messaging:	
Outbound SMS	0.009
Additional Carrier Fees per message:	
US Cellular	0.006
Verizon	0.003
AT&T	0.0024 - 0.0048
T-Mobile	0.0036
Inbound SMS	0.009
Additional Carrier Fees per message:	
US Cellular	0.006
Verizon	0.0096
AT&T	0.012
T-Mobile	0.0036
Inbound MMS	
Additional Carrier Fees per message:	
US Cellular	N/A
Verizon	N/A
AT&T	N/A
T-Mobile	0.012

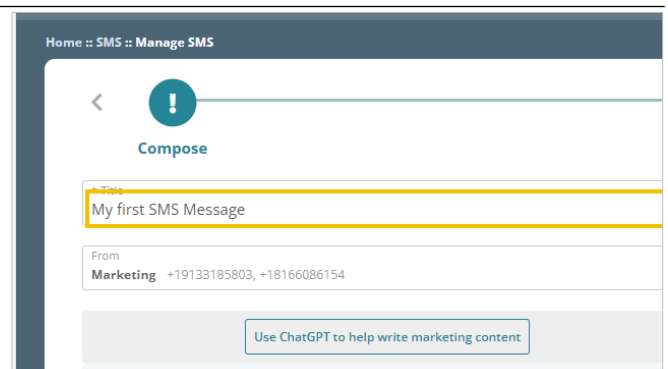
7.2. Create a SMS Message

If SMS has been enabled in your account, you will find an SMS section available to you in the Messages dropdown.

1. **Drafts:** See a list of all your existing SMS draft messages.
2. **Sent:** See a list of all your previously sent SMS messages.
3. **Scheduled:** See a list of all your currently scheduled SMS messages.
4. **Automated:** See a list of all your current automated SMS messages.
5. **New SMS:** Create a new manual SMS message.
6. **New Automated SMS:** Create a new automated SMS message.
7. **Inbox:** View responses contacts have texted back to your Twilio number(s).

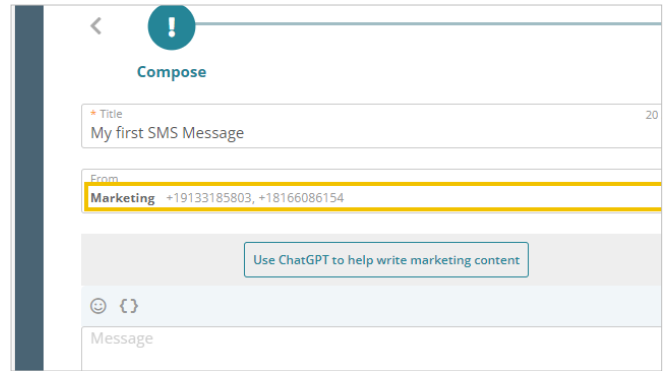


The compose process is similar to that of creating and deploying an email. First, create an internal title for your SMS message.

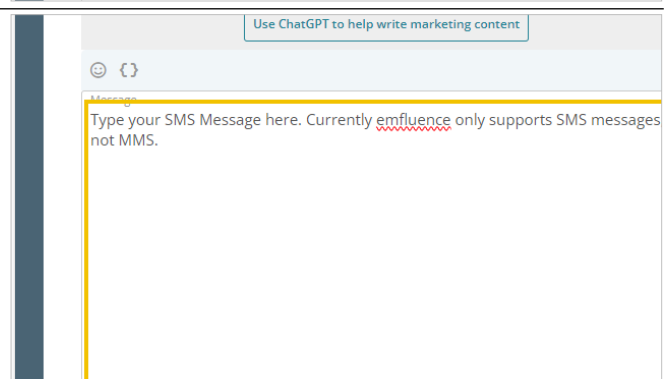


emfluence Help Section

Next, a Twilio messaging service must be selected. In most accounts, there will only be a single service available although that service may contain multiple phone numbers.

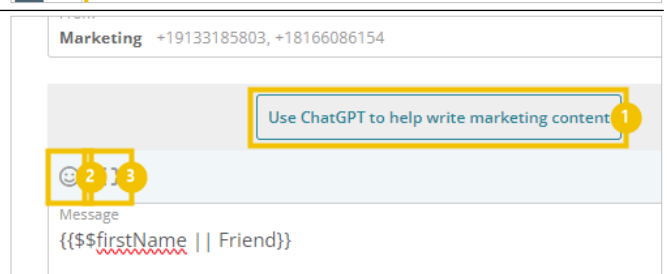


Click into the main message window and type or paste your message. emfluence currently only supports SMS messaging, it does not currently support MMS sends.

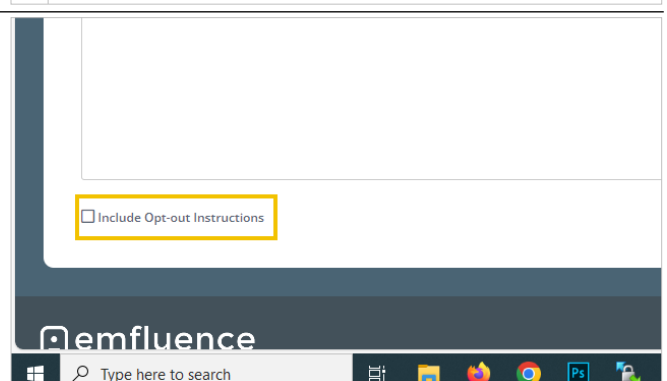


You can make use of the icons above the message window to help add content to your message.

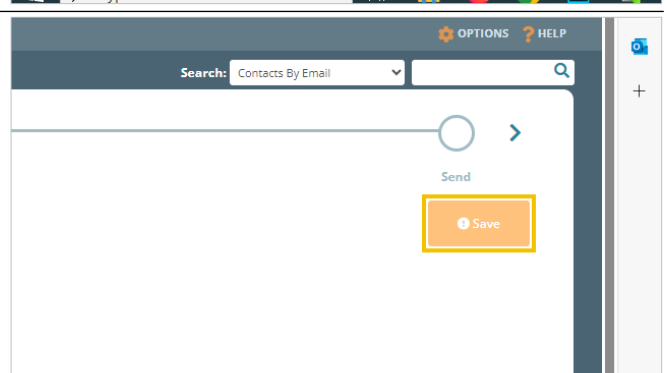
1. **ChatGPT:** Use ChatGPT to help write your message.
2. **Emoji:** Click to insert an emoji
3. **Insert Variables:** Click to insert a variable



Click on the box to **Include Opt-out Instructions** at the bottom of your message.



Click **Save** and then advance to the **Recipients** step.

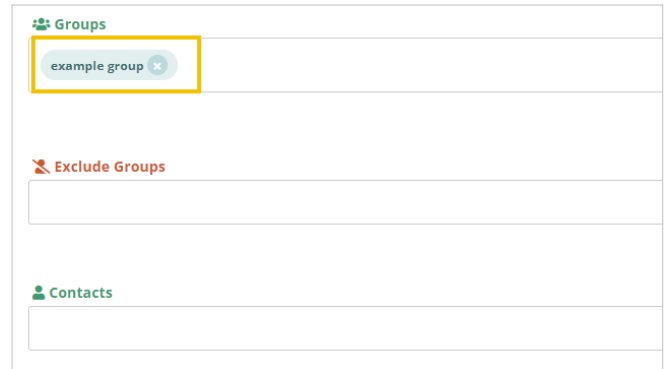


emfluence Help Section

Choose your groups just as you would for an email send. The counts will only display based on contacts who have a phone number saved in their Mobile Number field. Any contacts within those groups without a mobile number cannot be included in the send.

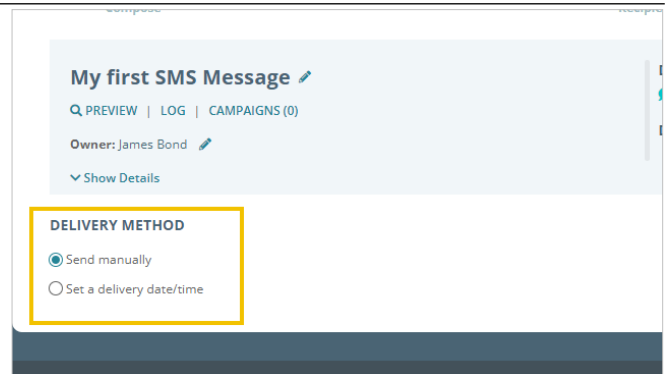
Automated SMS will be fed as part of a workflow, so no recipients need to be chosen for an automated SMS message.

Save and continue.



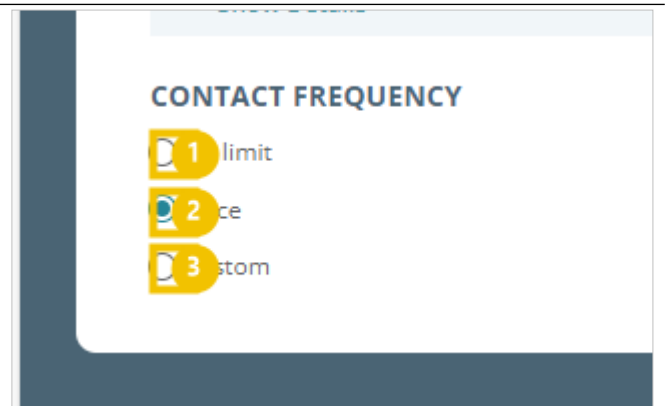
For a manual SMS message, delivery options work the same as they do on a manual email send. Choose either to send now, or choose a date and time in the future for your send to deploy.

Save and advance to the Send step.

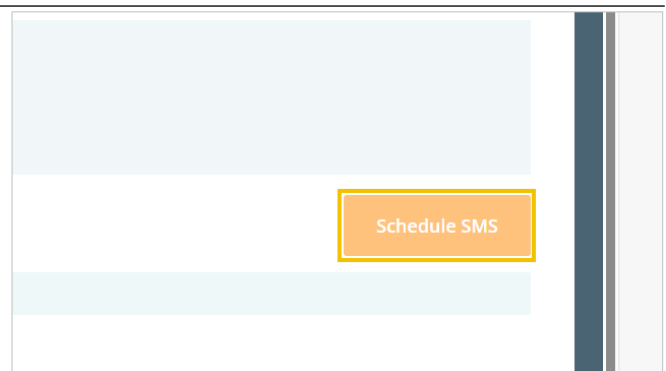


For automated SMS messages you will need to set the frequency how often someone could be queued up to receive this message. NOTE: They would still need to reach the SMS message in the workflow at a later date to be able to receive the message an additional time even if additional sends are allowed here.

1. **No limit:** This allows the contact to receive the SMS message as many times as they are queued to receive it. Be very careful when using this option.
2. **Once:** The default option of Once only allows contacts to receive the SMS a single time and they will not receive it again even if they are queued for a later deployment.
3. **Custom:** This allows you to set up a custom date range, for example once a year for a birthday SMS message.

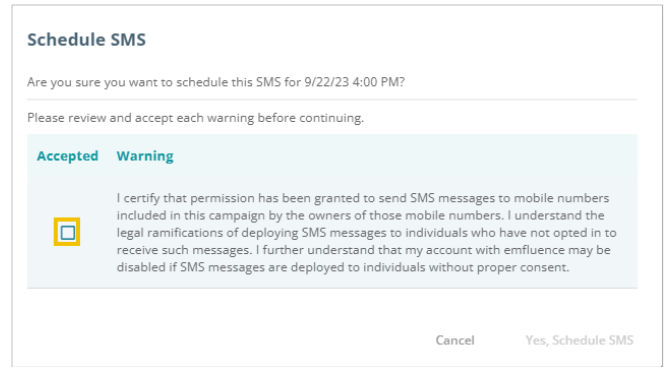


Advance to the Send step and if no errors need to be addressed, click on the **Send / Schedule / Activate** button to deploy your SMS message.



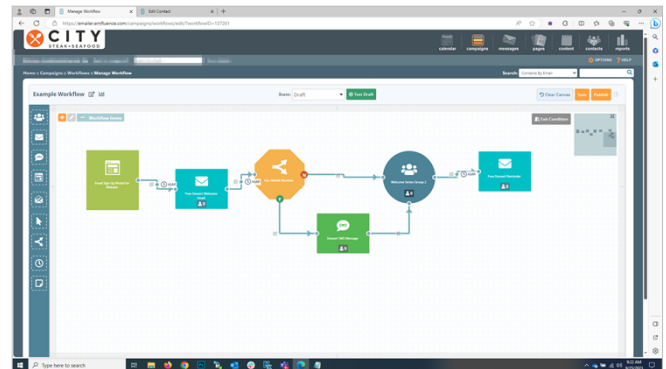
After clicking the send button, you will need to verify you have permission to send to the numbers in your list(s). Twilio and SMS Carriers take the legality of SMS opt-in very seriously. Sending to numbers without consent may lead to your account being shut down and possible legal repercussions as well.

After accepting the warning, click to schedule / send / activate your SMS message.



7.3. Add SMS to a Workflow

Like automated emails, automated SMS can be added to a workflow. Any contact hitting an SMS node without a number saved in the Mobile Number field will not advance. If not all your contacts have mobile numbers saved, and your flow continues past the SMS message, you may consider using a decision to allow those without mobile numbers to bypass the SMS node and continue.



As with emails, drag an SMS message from the left sidebar onto the workflow canvas.

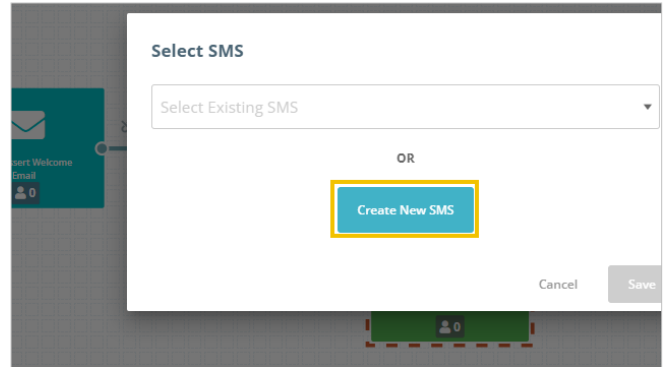


Connect the SMS message as part of your workflow.

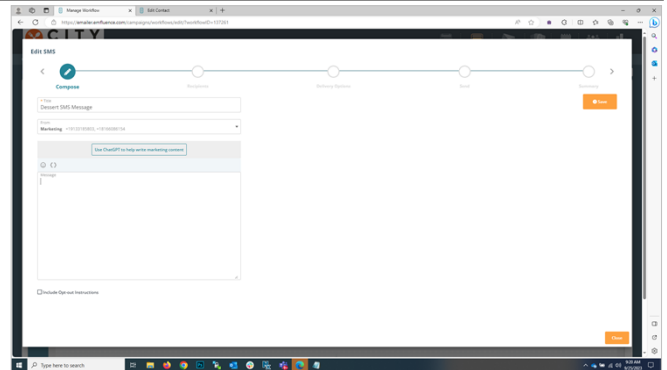


emfluence Help Section

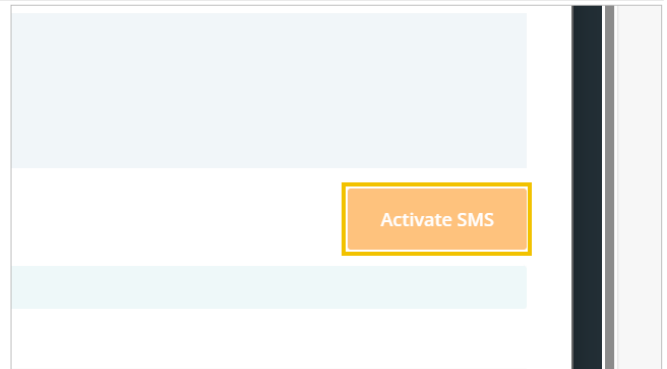
Either choose an existing automated SMS message from the dropdown menu or click on the button **Create New SMS**.



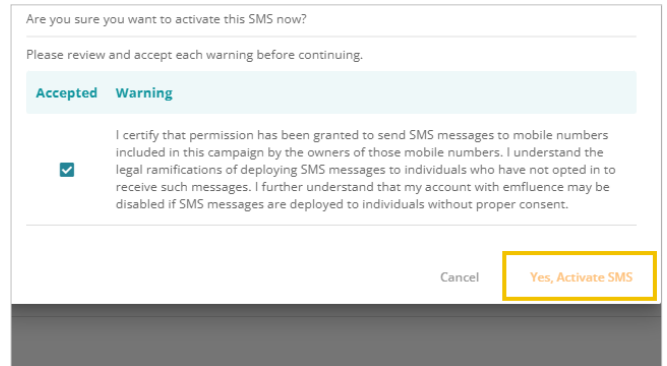
Compose your automated SMS just as you would a manual SMS message.



On the Send step, click on **Activate SMS**.



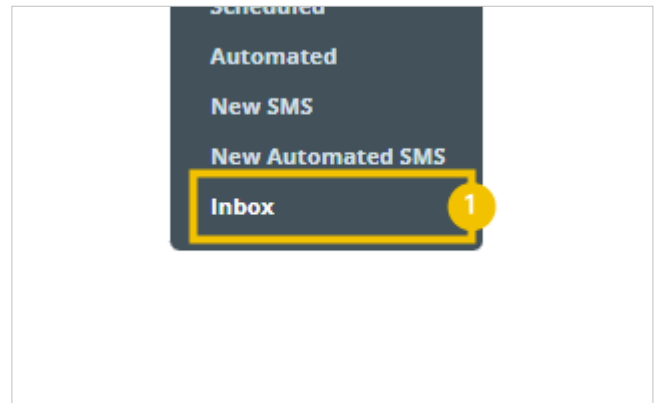
Confirm you have permission to send SMS to anyone added to this workflow and click **Yes, Activate SMS**.



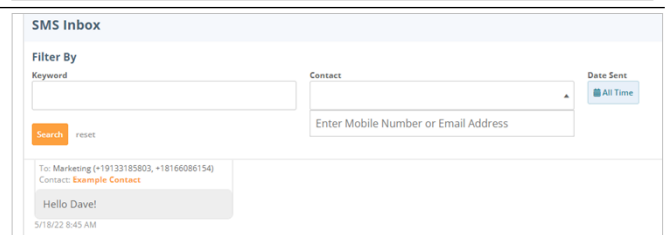
7.4. SMS Inbox

emfluence will keep track of when contacts text back to your SMS messaging service. The full list of these messages can be found in the SMS inbox.

1. **Inbox:** Click the Inbox link to see all incoming SMS messages.

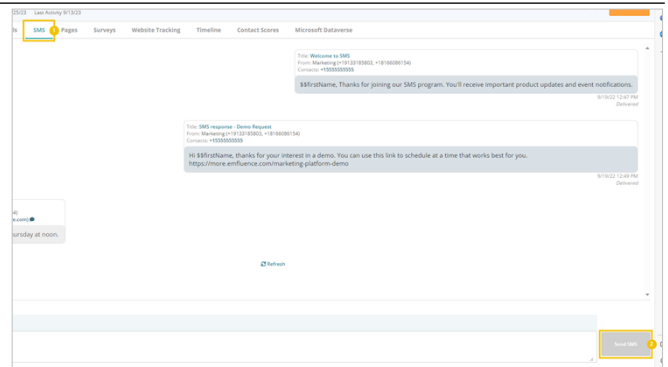


Messages deployed from emfluence will be displayed on the right-side of the screen. A response from a contact will be displayed on the left. Use the Filter options to limit your search to specific keywords, contacts, or date ranges.



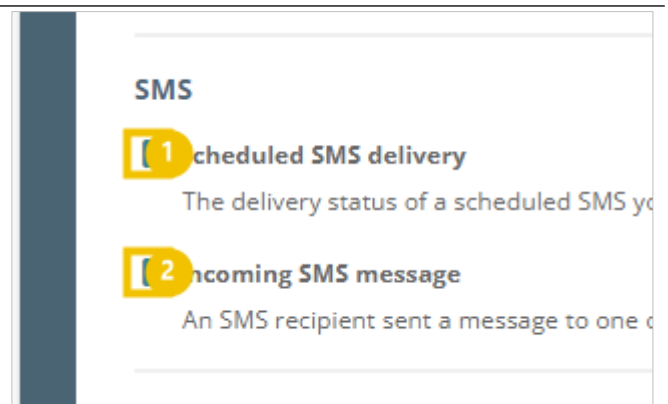
You can also find SMS history on the contact record in the SMS tab which will include all SMS messages sent to the contact and any replies messaged back.

1. **SMS:** Click on the SMS tab of the Contact record to view all SMS correspondence with this contact.
2. **Send SMS:** Compose and send a new SMS message to the contact from their contact record.



Notifications for SMS can be handled in the Options menu under Notifications. When adding or removing permissions, don't forget to save at the bottom of the page.

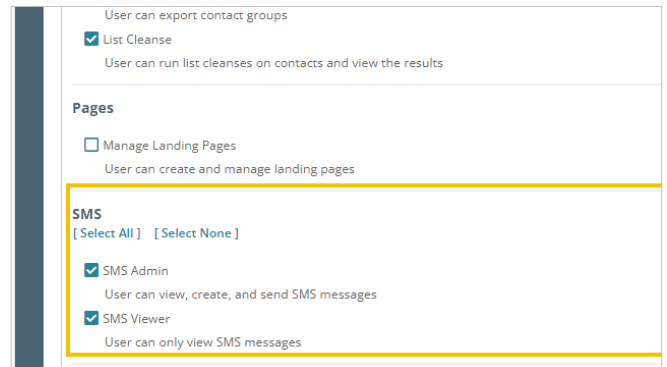
1. **Scheduled SMS delivery:** Receive a notification when a SMS is sent or fails to send.
2. **Incoming SMS message:** Receive a notification when someone sends a text message to your SMS number. You must have permission to view SMS for this permission to apply.



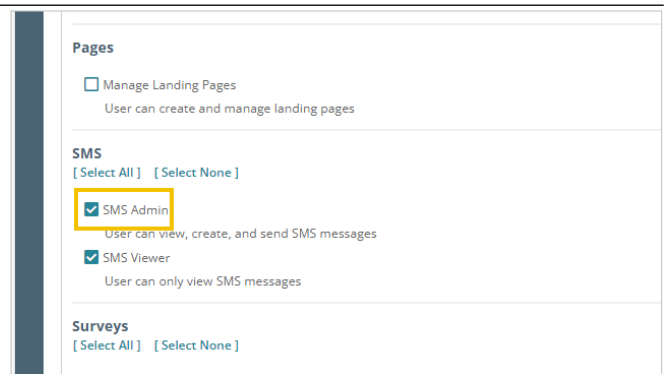
7.5. SMS Permissions

In order to have access to SMS messages, your account must first have SMS turned on with a Twilio messaging service connected.

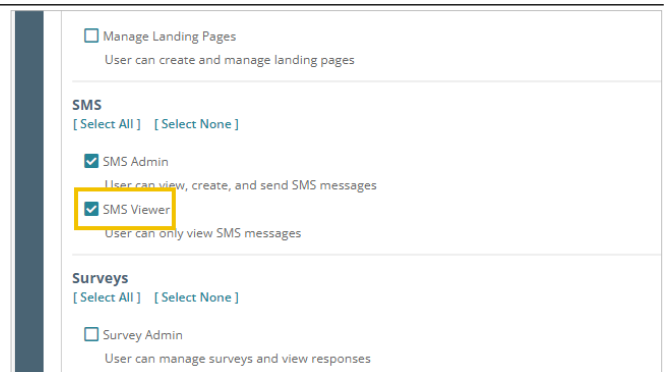
For individual users to see and interact with SMS messages, they must either be client admins in the account (who are given access to everything by default), or have one of the two specific SMS permissions on their user profile.



Users with the **SMS Admin** permission can view, create, and send SMS messages.



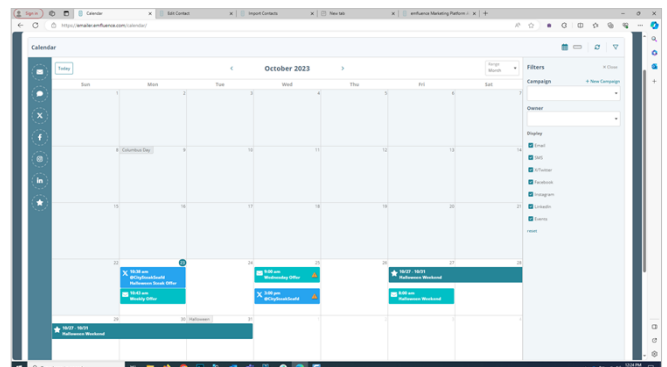
Users with the **SMS Viewer** permission can view SMS messages.



8. Calendar

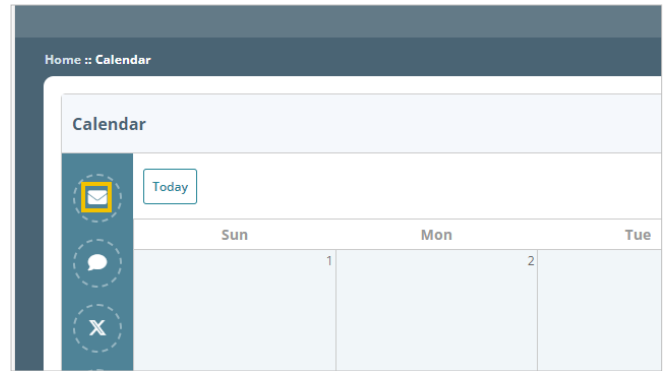
8.1. Calendar Overview

The emfluence Calendar allows you to see past messaging, and create future email and social posts, on a calendar view.

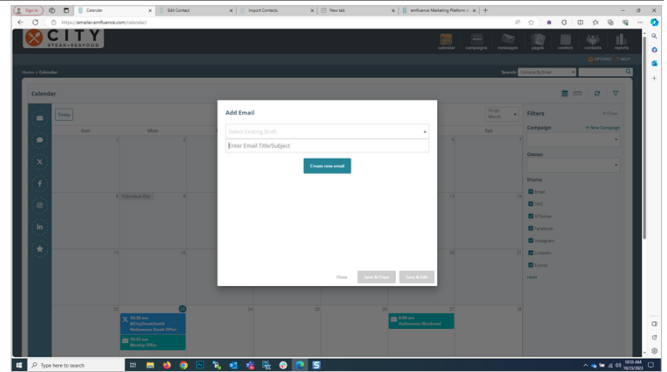


emfluence Help Section

You can drag items from the left-sidebar and drop then on any current or future day on the calendar.

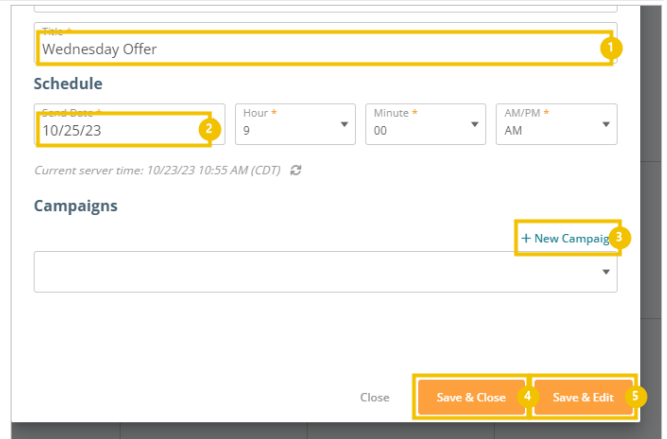


When dragging out an email, select an existing draft or create a new email without having to leave the calendar.

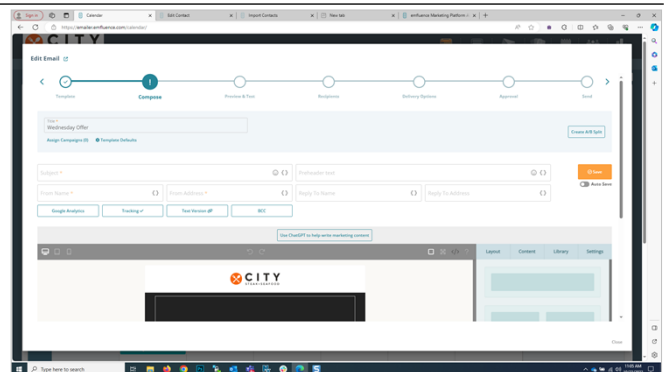


Choose your template, and fill in the starting information about your email.

1. **Title:** Add the title of your email.
2. **Schedule:** Set the date and time of your email. This can be changed later, but in order for it to show up on the calendar a date and time must be included.
3. **Campaign:** Add to an existing campaign or create a new campaign.
4. **Save & Close:** Save your email as a draft and close the window. You can return to edit the email on the calendar or in the message section at a later time.
5. **Save & Edit:** Save your settings and launch the email editor modal in your window.

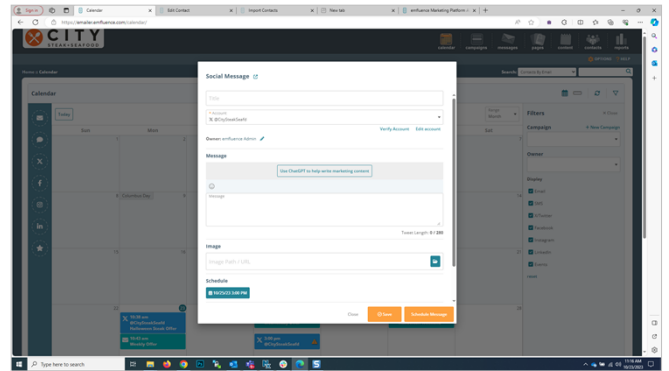


When editing an email on the calendar, the entire compose process will be iframed on your screen. You can compose your email, add recipients, and schedule your email without leaving the calendar.

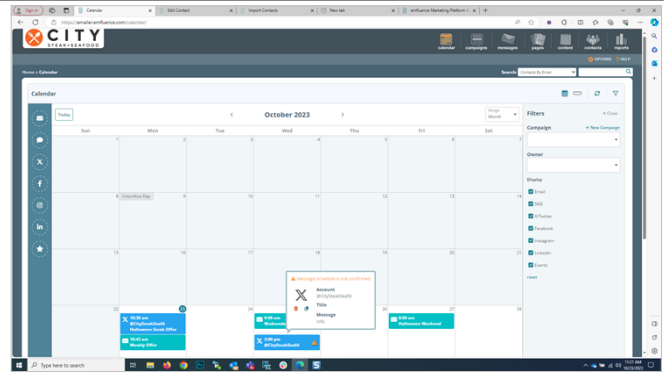


emfluence Help Section

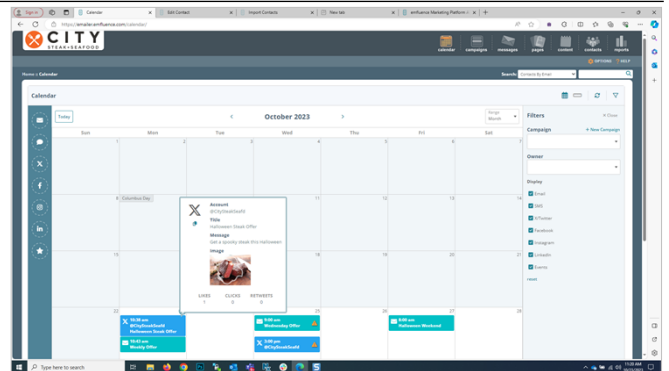
In the same way, you can drag social messages (and SMS, if enabled in your account) onto the calendar and save them as drafts or schedule them. NOTE: You will need to have the proper permissions to create these posts.



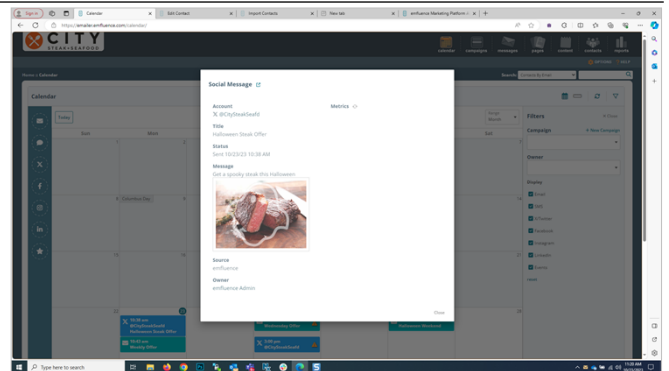
You will notice messages that have not been confirmed will have a warning symbol shown on them. Hovering over the message will provide more information. Clicking on the message will allow you to complete your message within a modal.



When hovering over a previously sent message, you will see information provided about the message.

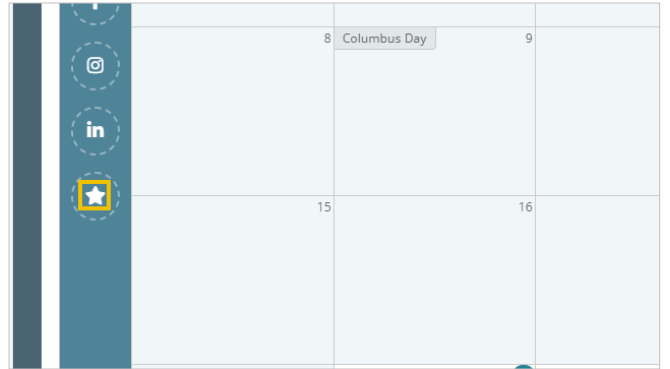


Clicking on a previously sent message will open a modal with more information about the message available.



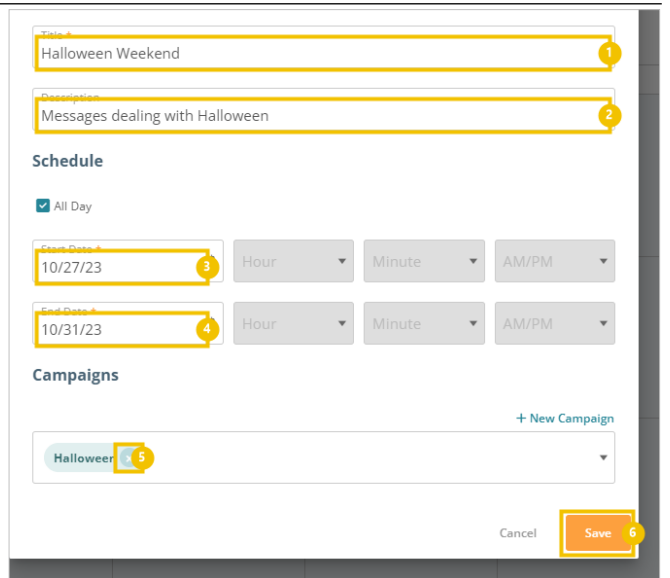
emfluence Help Section

The last item on the left-sidebar is an **Event**. While an event doesn't trigger any action outside the platform, it can be used to provide helpful context to an important date or date range you want reminded about on your calendar.

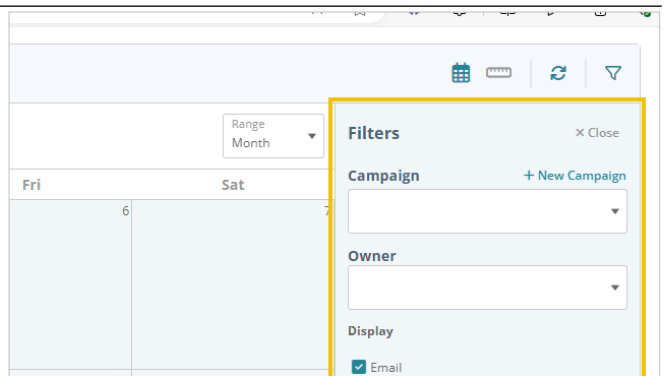


After dragging an event to the calendar, fill in the settings in the modal.

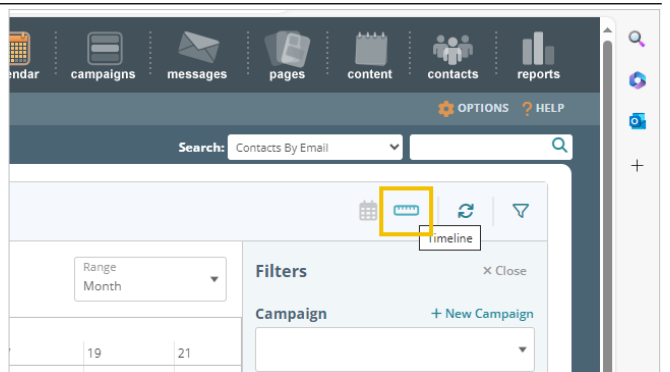
1. **Title:** Name your event
2. **Description:** Provide an optional description about your event.
3. **Start Date:** Set a start date for your event. You can set a specific time or you can leave the all day box checked.
4. **End Date:** Set an end date for your event.
5. **Campaigns:** Add any campaigns you wish tied to your event.
6. **Save:** Save and place your event on the calendar.



You can use the **Filters** menu to filter which types of messages you want shown on the calendar and/or messages from specific campaigns or owned by a specific user.



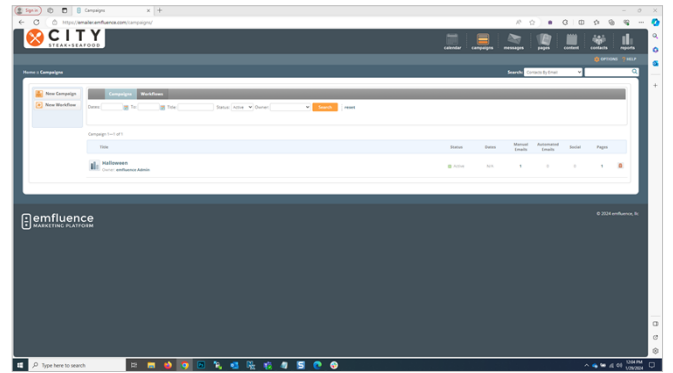
By clicking on the **Timeline** icon, you can see your posts placed on a timeline rather than in the default calendar view. The same filters can still be applied in the timeline view.



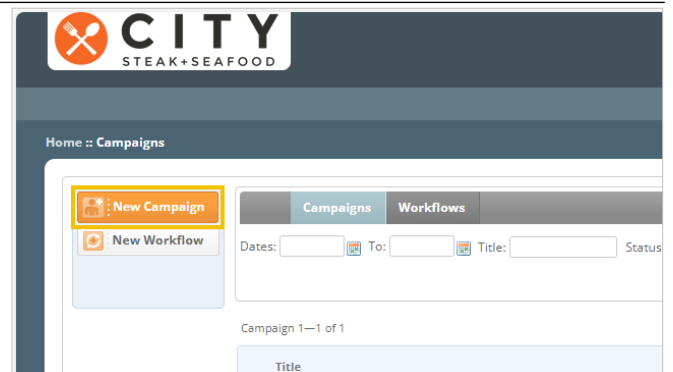
9. Campaigns

9.1. Creating Campaigns

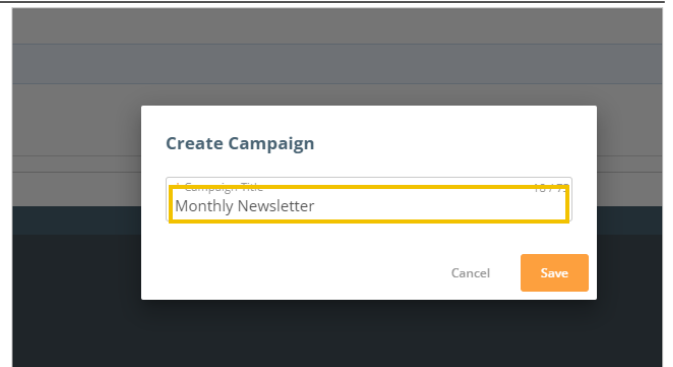
Located within the Campaign menu, Campaigns can be created to organize emails, surveys, landing pages, and more for reporting purposes.



To create a new campaign, click on **New Campaign**.

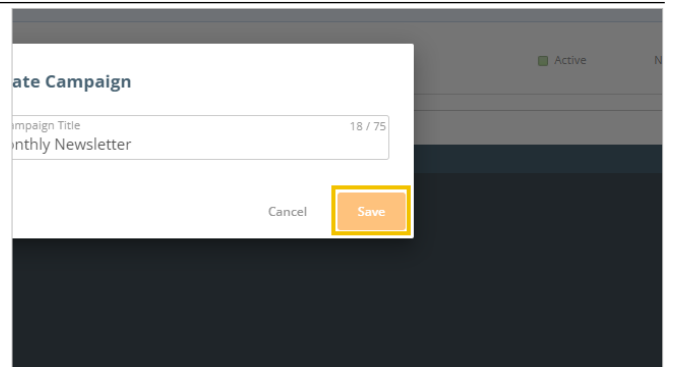


In the pop-up, fill in your campaign title.

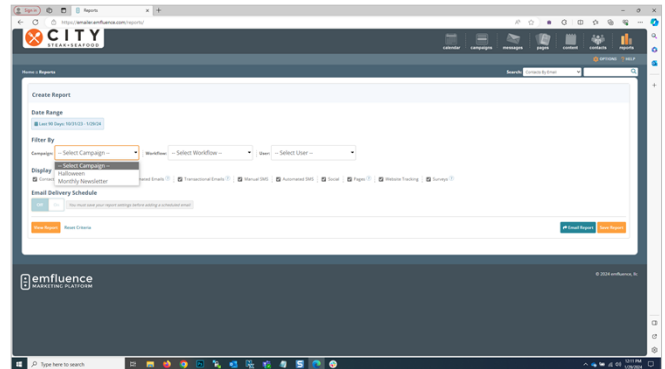


Click **Save**.

Now your campaign exists and you can begin adding items to it whenever you wish.

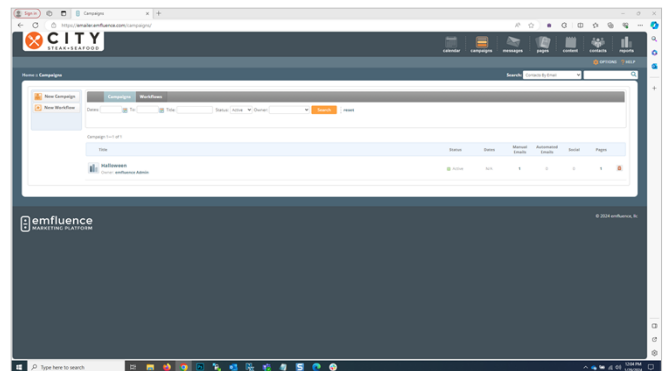


Once campaigns exist, you will be able to choose one as a filter in the Reporting section to limit your reporting to only items within that campaign.

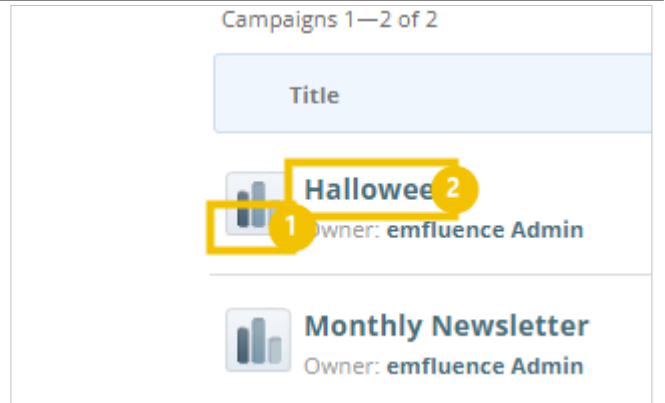


9.2. Adding to Campaigns

Located within the Campaign menu, Campaigns can be created to organize emails, surveys, landing pages, social messages, and more for reporting purposes.

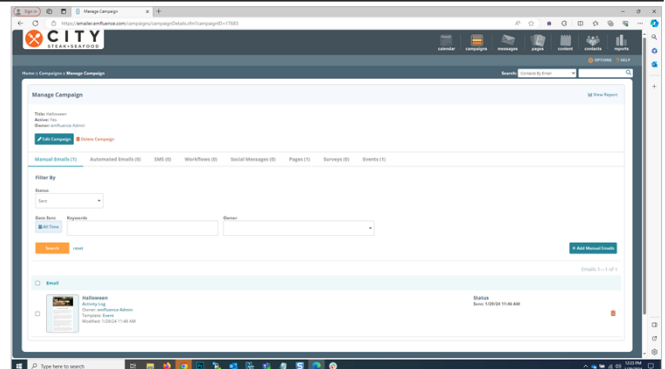


On the main campaign page, all of your campaigns will be listed along with filters to search for campaigns. For each campaign, the numbers of manual & automated emails, social messages, and landing pages will be shown.



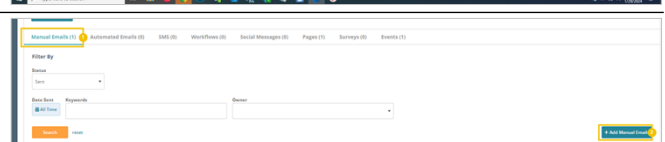
1. **View Report:** You can click on the icon next to the campaign to view reporting for that campaign.
2. **Campaign Title:** To edit a campaign, click on the title of the campaign

Click on any of the tabs within the Manage Campaign page to see what is already part of the campaign and add/remove more items to your campaign.



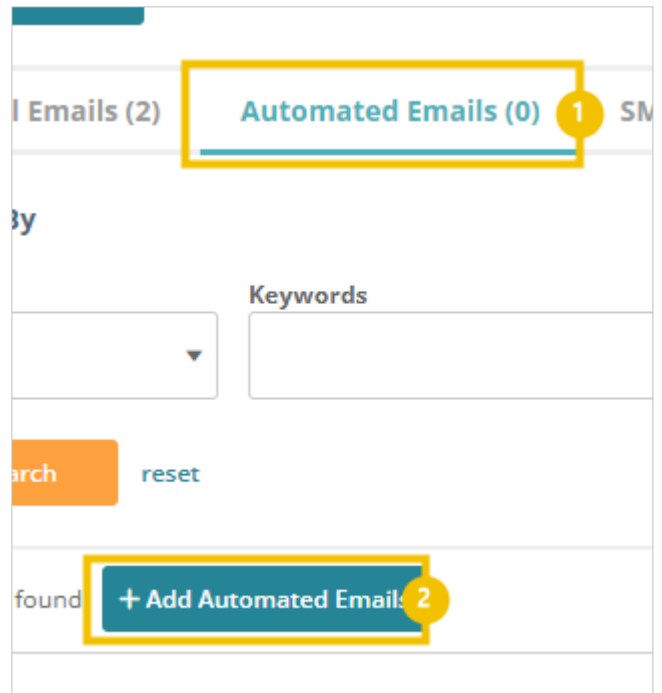
Manual Emails

1. **Manual Emails:** All manual emails part of your campaign will be shown here
2. **Add Manual Emails:** Click the button to search and add other manual emails to this campaign.



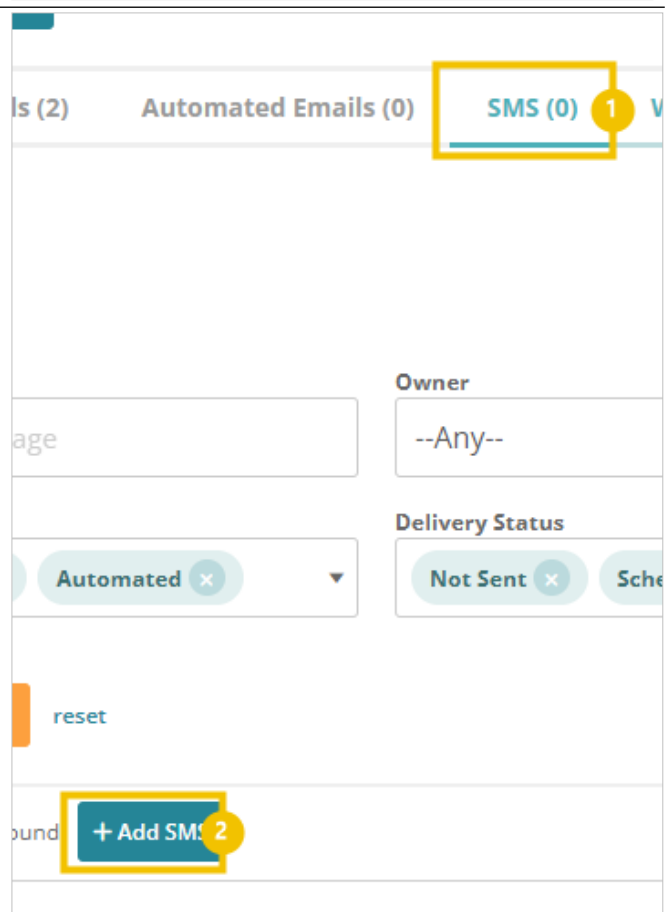
Automated Emails

1. **Automated Emails:** All automated emails part of your campaign will be shown here.
2. **Add Automated Emails:** Click the button to add automated emails to this campaign.



SMS

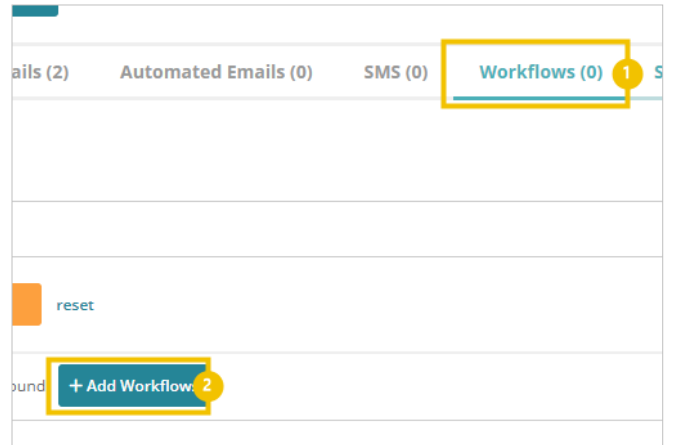
1. **SMS:** SMS messages included in your campaign will be shown here.
2. **Add SMS:** Click the button to add SMS messages to your campaign.



emfluence Help Section

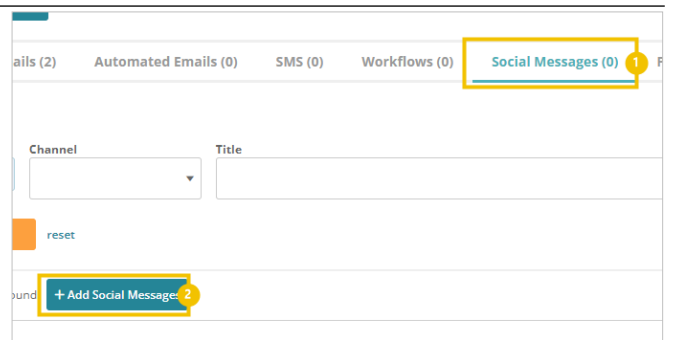
Workflows

1. **Workflows:** Workflows included in your campaign will be shown here.
2. **Add Workflows:** Click the button to add new workflows to this campaign.



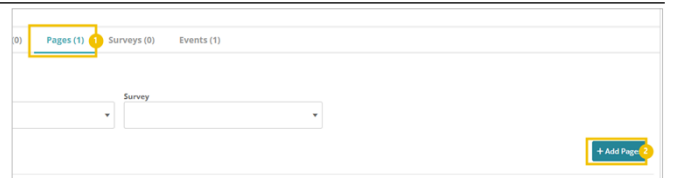
Social Messages

1. **Social Messages:** Social Messages (Facebook, Instagram, LinkedIn, and X) included in your campaign will be shown here.
2. **Add Social Messages:** Click the button to add new social messages to this campaign.



Landing Pages

1. **Pages:** Landing Pages included in your campaign will be shown here.
2. **Add Pages:** Click the button to add landing pages to this campaign.

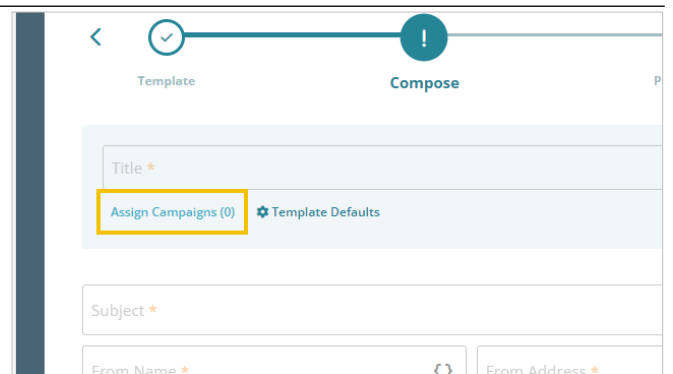


Events

1. **Events:** Calendar Events included in your campaign will be shown here.
2. **Add Events:** Click the button to add additional events to your campaign.

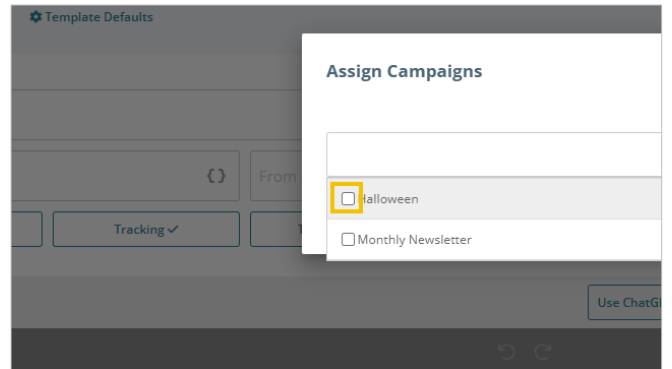


When making new emails and social messages you can assign campaigns as you make them by clicking on the option to **Assign Campaigns**.

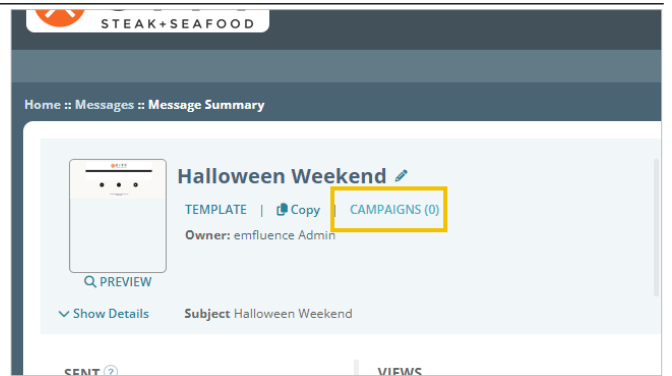


emfluence Help Section

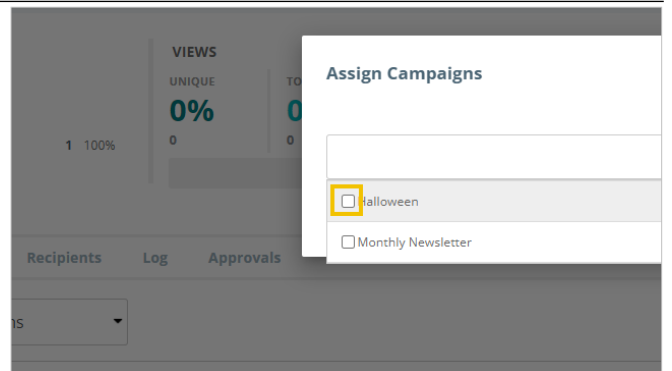
In the pop-up, choose the campaign(s) you want to assign this message to and Save.



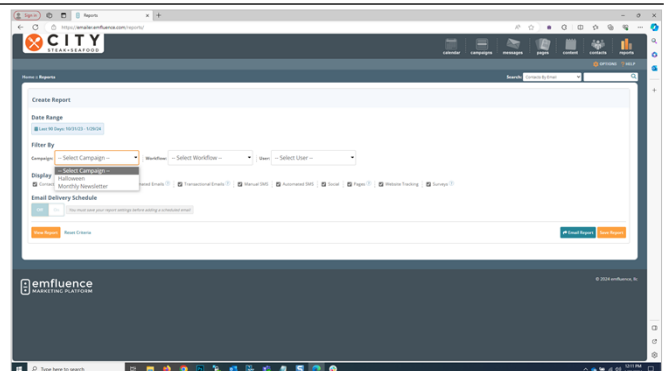
You can also assign sent emails to campaigns by clicking the **CAMPAIGNS** button on the summary page.



Choose the campaign(s) you want to add your message to and Save.



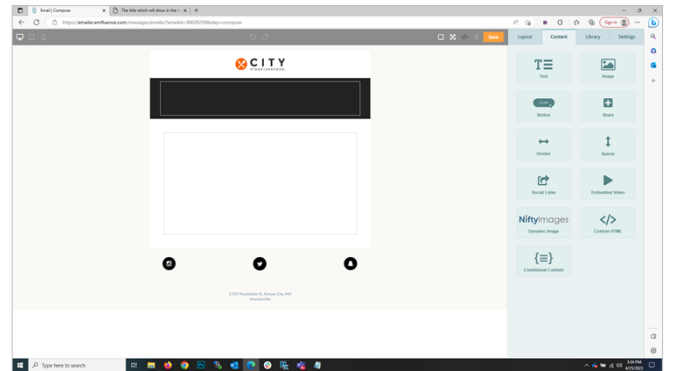
In the Reporting section, you can choose a campaign as a filter to limit your reporting to only items within that campaign.



10. Drag & Drop

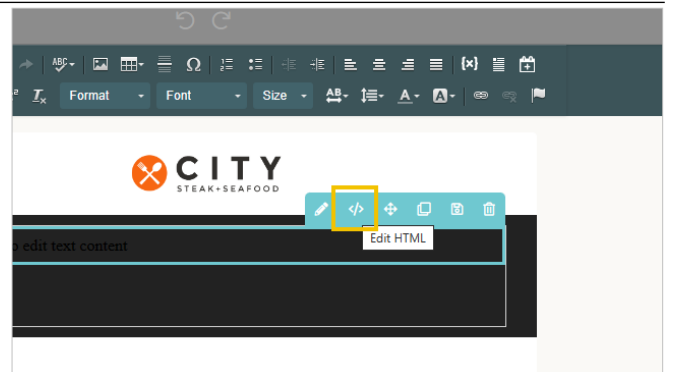
10.1. Drag & Drop Elements

Using the Drag & Drop Editor, you can drag layouts, elements, and library items from the right-sidebar into any editable area on your template. For more on library elements and layouts, check out the emfluence Help Section.

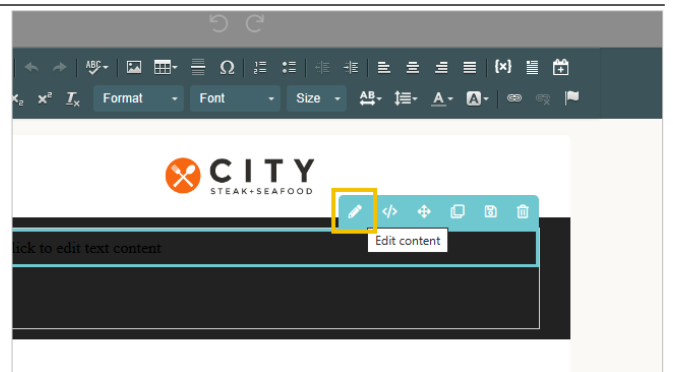


At the top of all elements, when clicked on, a menu will appear. Each button will allow you to edit, move, save, or delete content. Not all elements have all icons available.

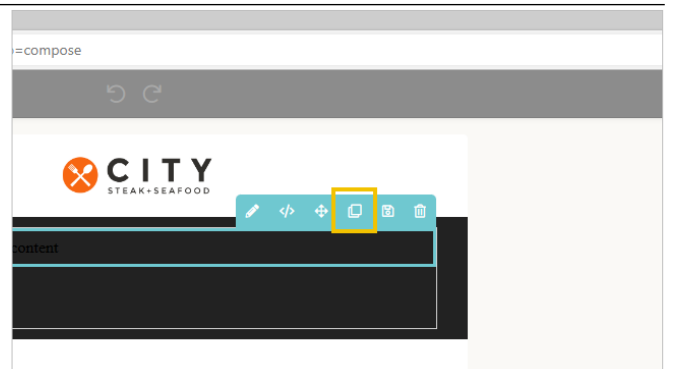
The **Edit HTML** icon allows you to view the full HTML of the element. On some elements, such as buttons, you will need to turn them into a HTML element to view the full HTML (losing specific sidebar options).



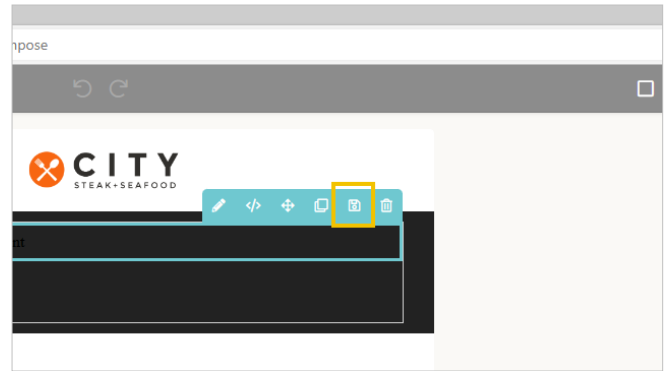
The pencil icon, available on a Text element, will launch the wysiwyg editor at the top of the screen. A standard web editor, hovering over any of the icons will provide information about each item in the menu.



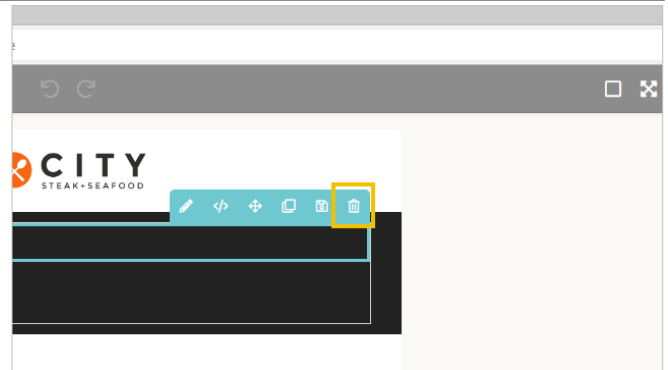
The **Copy** button will create a copy of what you have selected. If you have a layout selected, everything within that layout will be copied.



The **Save** icon will save whatever is selected as a new Library element. You can save simple elements such as buttons, text, etc. Or, if you add multiple elements to a layout, you can save the entire layout as a single library element.

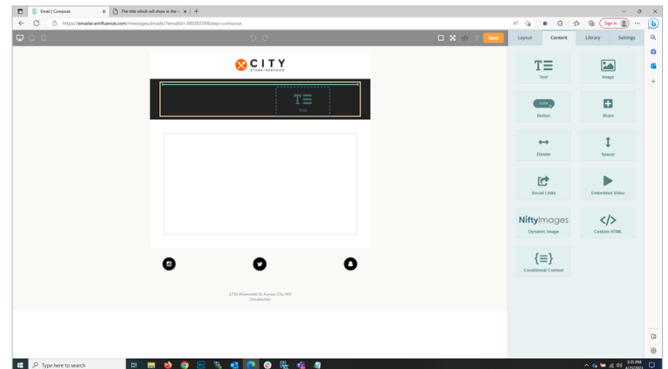


The **Trash** icon will delete the selected content. If a layout is selected, anything within that layout will be deleted.



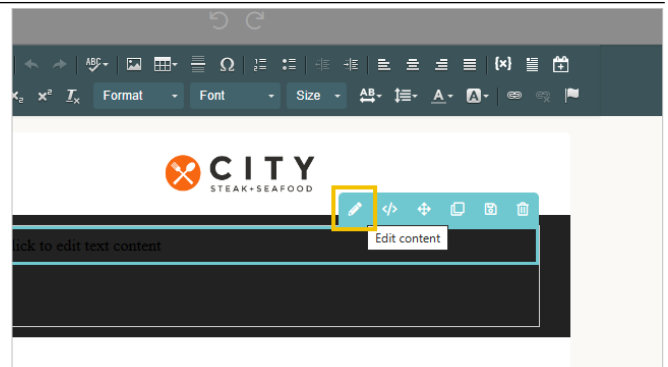
10.1.1. Text Elements

Drag a Text element from the right-sidebar and drop it into an editable area on your template.

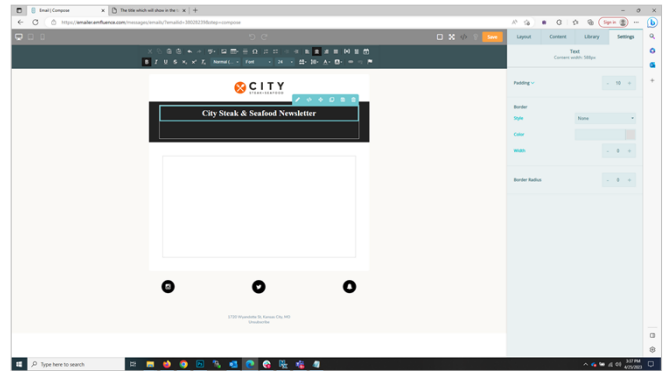


Clicking the pencil on a Text element will launch the wysiwyg editor at the top of the screen. A standard web editor, hovering over any of the icons will provide information about each item in the menu.

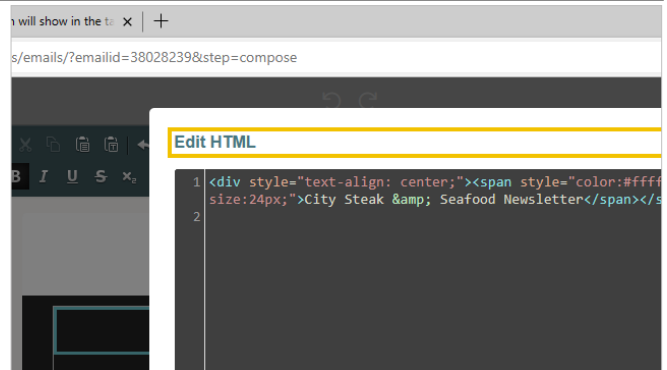
NOTE: Most options on elements is provided in the right Settings section. While some options do appear for the Text element, most of its menus instead appear in the editor at the top of the screen which is only visible when you are clicked into the element.



Using the text editor, you can make changes to text including font color and size, bold, underline, italicize, add links and variables, and more. Hovering over each icon on the editor will provide a help tip.

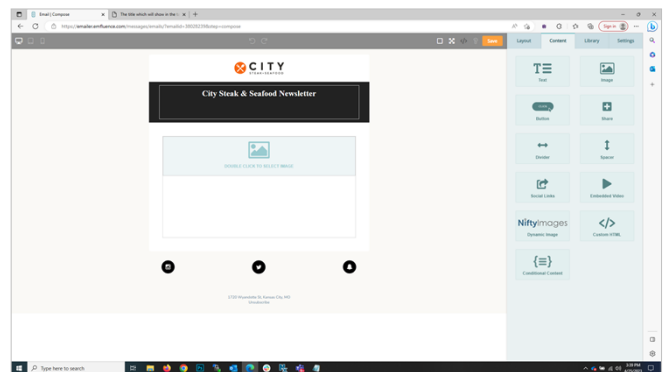


You can click on the icon to view and edit the HTML of your text element if you wish.

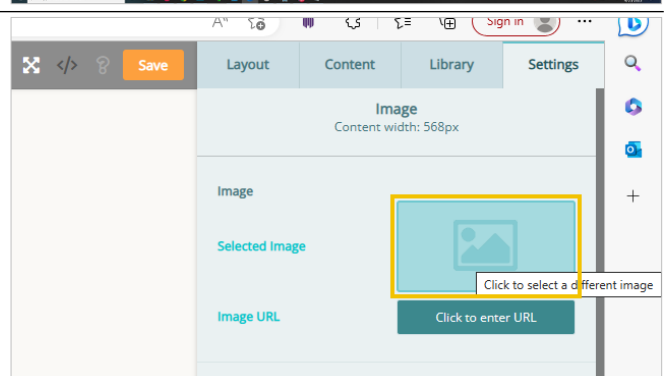


10.1.2. Image Elements

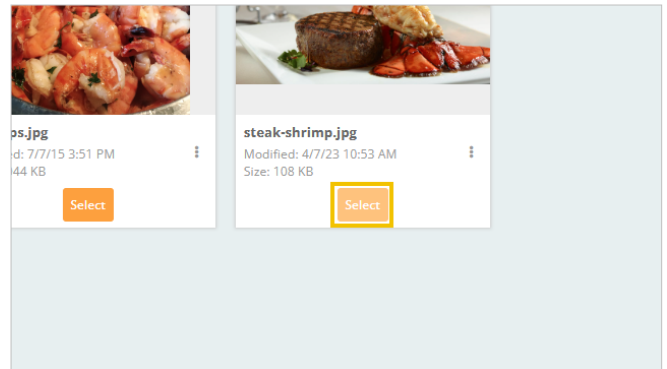
You can drag an Image element into an editable area, either directly into your email or place it within a layout.



In the **Settings** sidebar, you can click on the **Select Image** icon. This will launch your Upload Files folder and allow you to choose the image you wish to add to your email from your collection, or upload a new image and choose to add it.

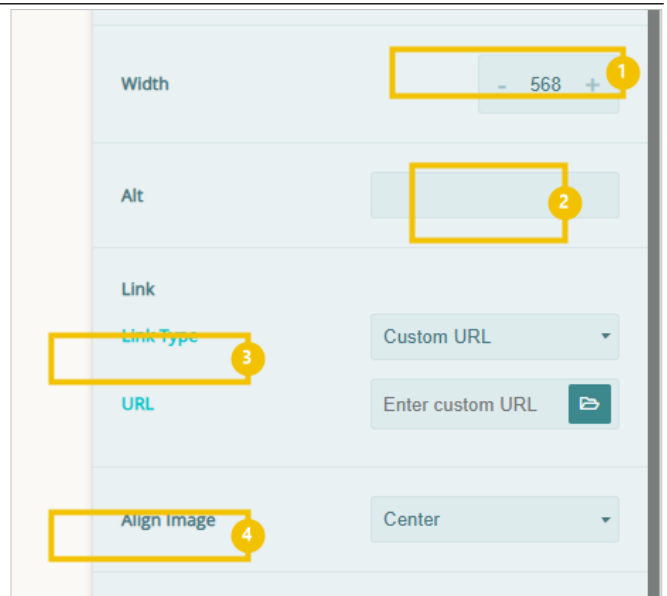


To insert an image, click **Select**.



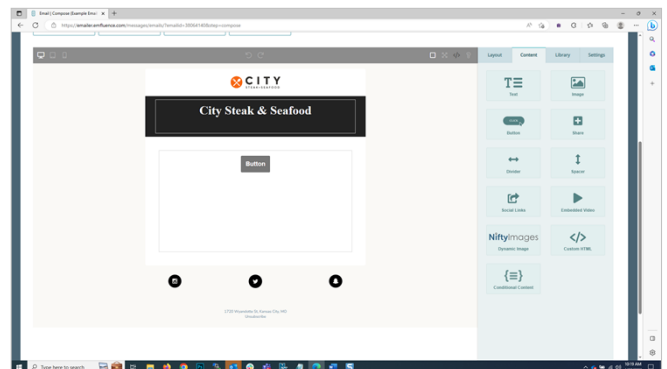
Further options are available in the Settings section for your Image.

1. **Width:** By default, the image element will display the full width of an image up to the max area allowed by the template. While you can increase this size manually, you will be warned when doing so as it could allow your image to break out of your template and push content outside of the designed areas.
2. **Alt Text:** Set alt text which will display for recipients who have images turned off by default.
3. **Add a Link:** You can add a link behind your image. If it is an emfluence link, such as a landing page or survey link, choose from the link dropdown. If it is a link outside of emfluence you can paste your link in the URL input. To choose the URL of file, such as a PDF, that is uploaded to your account, you can click the folder file and select the file as you would an image.
4. **Set Alignment:** Set the alignment of your image which will be Center by default.



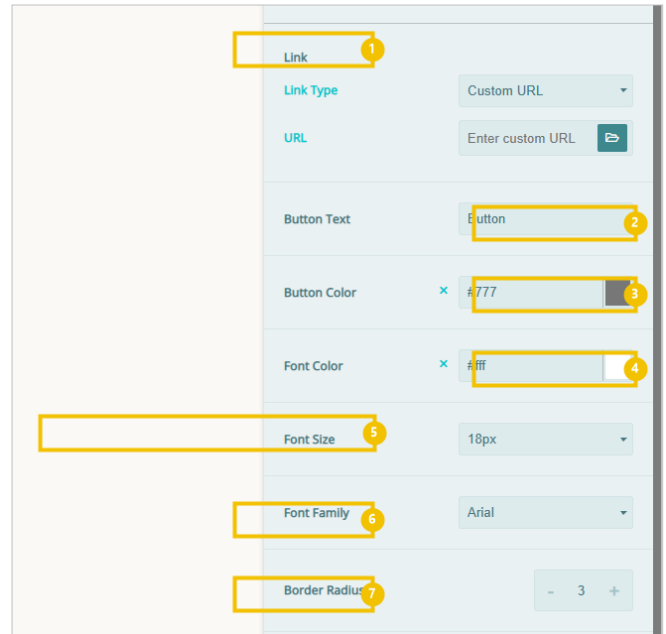
10.1.3. Button Elements

You can drag a Button into any editable area on your template.



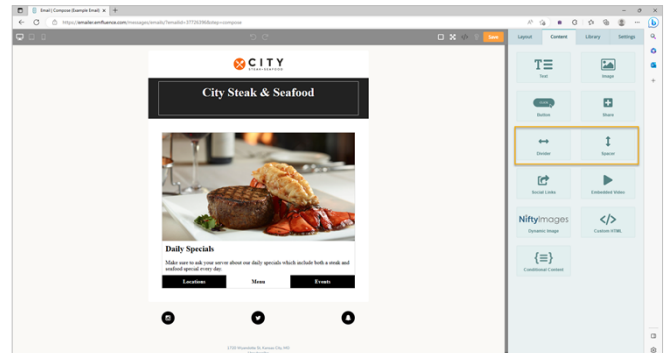
In the Settings menu, you can set options for your button including adding a link and stylizing the button.

1. **Link:** Add a link to your button. If it's an emfluence link, such as a link to a landing page or survey, choose the link from the dropdown. If it's a link outside emfluence, you can paste your link in the URL input.
2. **Button Text:** Type what text you wish the button to display.
3. **Button Color:** Change the color of the button.
4. **Button Font Color:** Change the color of the font within the button.
5. **Font Size:** Change the size of the text within the button.
6. **Font Family:** Change the font within your button. NOTE: If your template has a default font applied, choosing a different font here will overwrite those template settings.
7. **Border Radius:** Change the roundness of your button.



10.1.4. Dividers & Spacers

Dividers and **Spacers** can be dropped in to provide horizontal space between two sections of an email. These will allow you to quickly add space without having to pad the surrounding elements. The **Divider** will provide a break line of any color you choose. The **Spacer** will only include space. You can edit the size of each in the Settings menu when clicked in on the element you have dragged in.



10.1.5. Social Elements

The Social element can be used to insert social links in templates where they aren't coded, or used to highlight a specific social channel in a message.

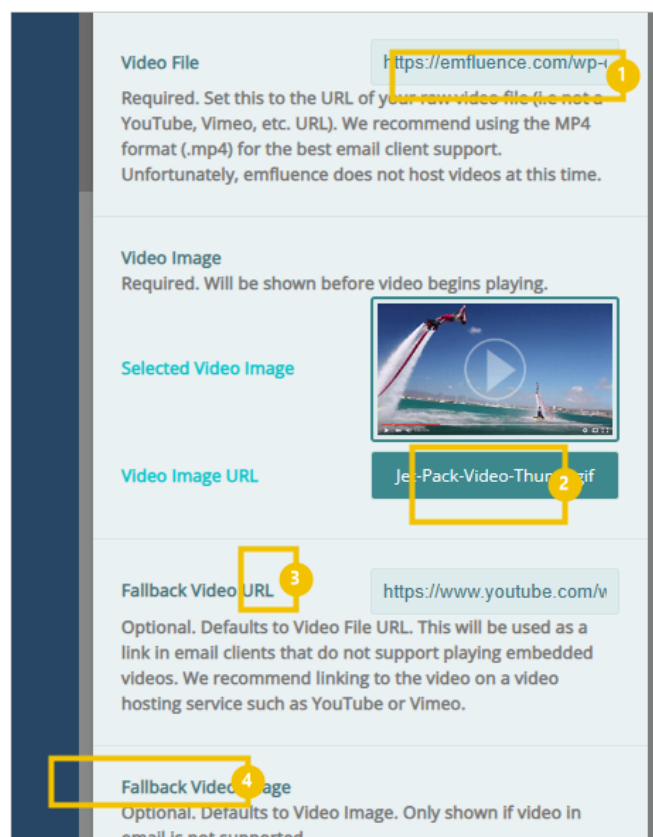
1. **Background:** Set the Background color of your element, or remove it completely.
2. **Padding:** Set the Padding of your element.
3. **Icon Theme:** Choose between white circles, black circles, or the individual icons shown in their brand colors as either circles or squares.
4. **Icon Size:** Set the size of the icons to small, medium, or large.
5. **Choose the Social Icons:** Choose, add, remove, and reorder the social icons you wish displayed.



10.1.6. Embedded Video (Email Only)

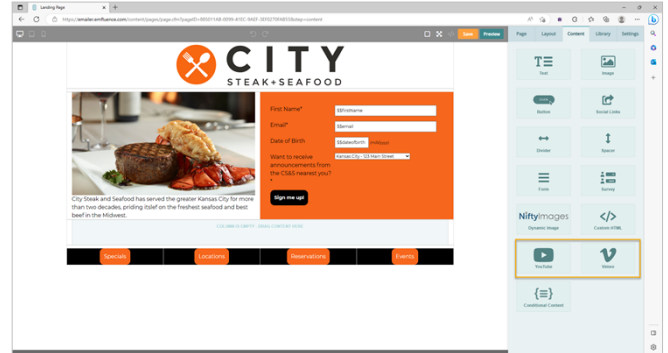
You can embed a video file to play in an email (in inboxes which allow video to be played). You will need to have a hosted file in mp4 or similar format.

1. **Video File URL:** Provide the file URL for the raw video (you CANNOT use a YouTube link). The URL should end in a format such as .mpg.
2. **Provide a Video Image:** This image will lay over the video before the recipient clicks on it.
3. **Fallback URL:** Provide a link to where to send the recipients if their inbox won't play the video in the email (NOTE: most will not).
4. **Additional Fallback Image:** You can additionally add another fallback image to the video. However, if you use both the Video Image and the Fallback Video Image some inboxes may display both separately.



10.1.7. YouTube & Vimeo (Page Only)

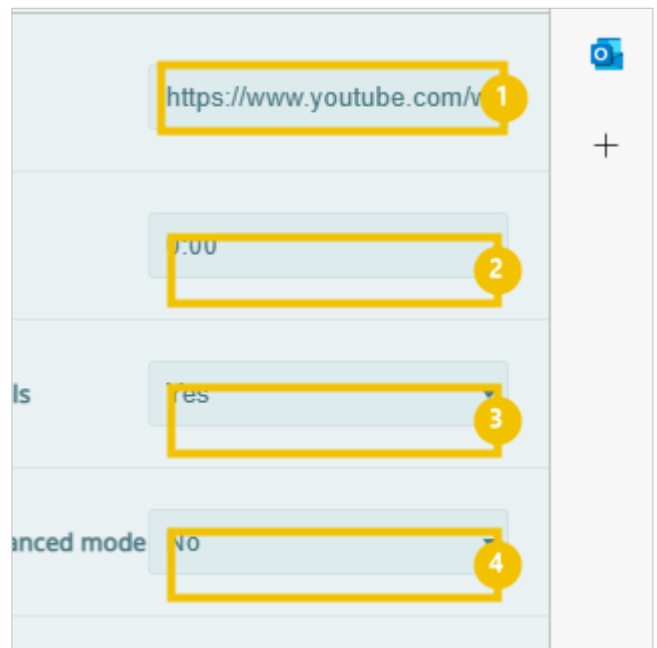
On **Pages**, you can drag out **YouTube** and **Vimeo** elements to add videos from those platforms. For embedded video from other platforms, you can use the custom HTML element.



10.1.7.1. YouTube

Drag a YouTube element from the sidebar and drop it onto your page. Paste the URL in the Settings section and edit any other settings you wish.

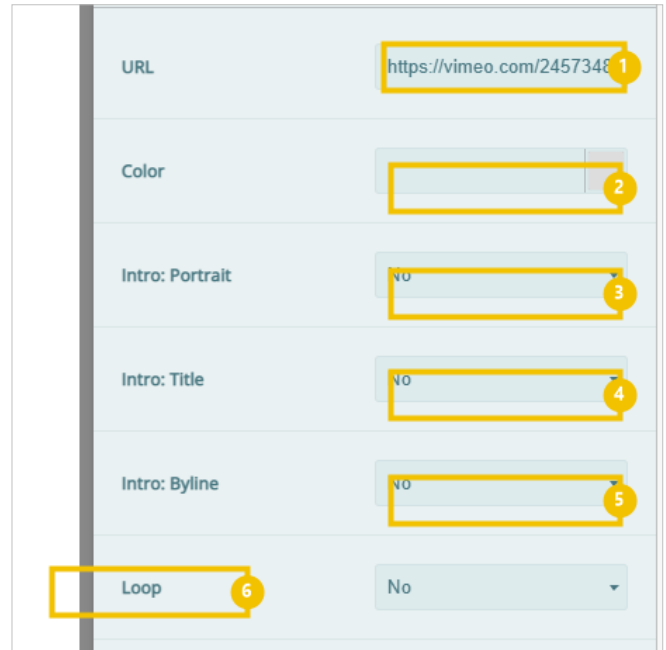
1. **YouTube URL:** Paste the URL of the YouTube video here.
2. **Start At:** By default, the video will start at the beginning. However, if you wish it to start later, you can type in a different starting time.
3. **Show Player Controls:** Show or hide player controls.
4. **Enable privacy-enhanced mode:** When set, views by the user will not be used to alter or personalize their experience further on YouTube.



10.1.7.2. **Vimeo**

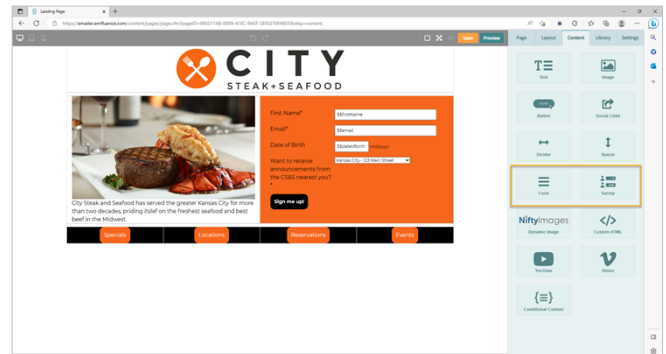
Drag a Vimeo element and drop it on the page. Paste in the URL and change any settings in the Settings panel on the right-sidebar.

1. **Vimeo:** Paste the Vimeo URL of your video here.
2. **Color:** Change the color settings of the Vimeo video.
3. **Intro Portrait:** Show or hide the Vimeo author portrait.
4. **Intro Title:** Show or hide the Title of the Vimeo video.
5. **Intro Byline:** Show or hide the author byline of the video.
6. **Loop:** Loop the video to replay.



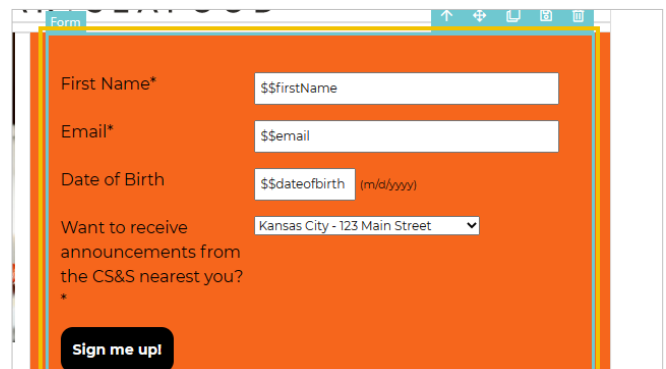
10.1.8. **Forms & Surveys (Page Only)**

On **Pages**, you can insert both **Forms** and **Surveys**. Forms are used for data entry. Use a form to gather contact information from your subscribers such as name, phone number, company, etc. Every entry on a form is written to a field on the contact record. Surveys offer more options to query your contacts on various subjects using a variety of question types.



10.1.8.1. **Forms**

After dragging a **Form** element onto a landing page, you can either choose any existing landing page from the dropdown menu or create a new form. Forms will pick up formatting from the page. However, any formatting on the forms themselves will overwrite the page default.



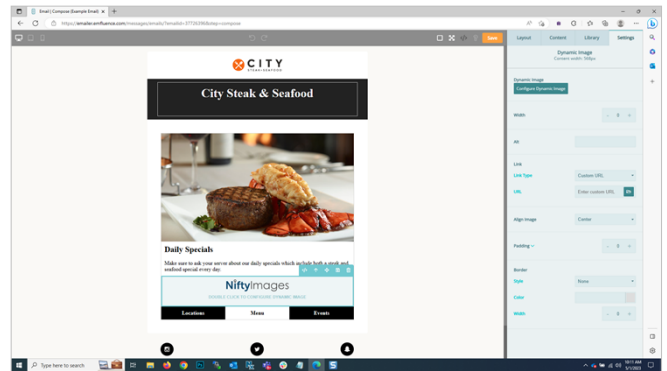
10.1.8.2. Surveys

After dragging a **Survey** on to a page, you can either choose an existing survey from the dropdown or create a new survey. Any formatting on the survey will overwrite the page formatting.

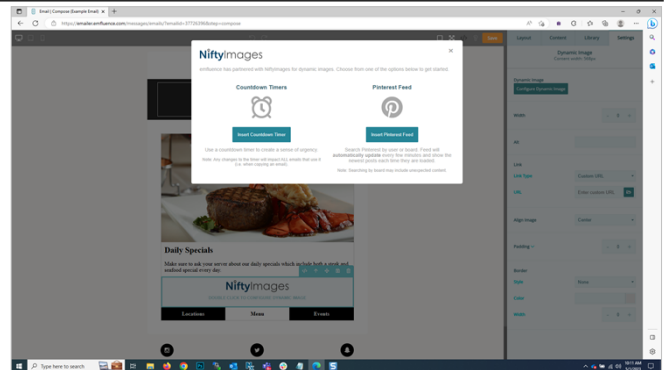


10.1.9. Nifty Images

Through emfluence's integration with Nifty Images, you can add Countdown Timers and Pinterest Feeds to your email.

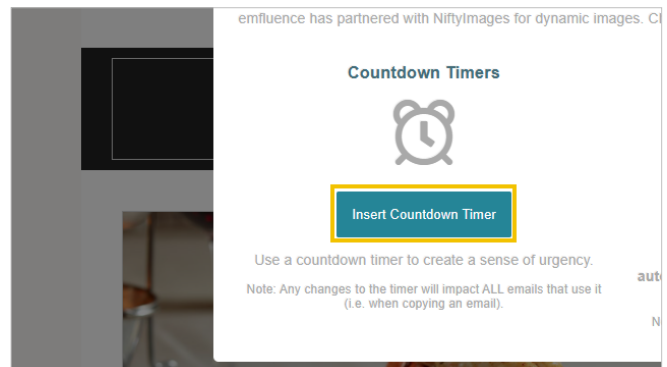


Clicking Configure Dynamic Image will allow you to choose from the types of NiftyImages you can add to your email.



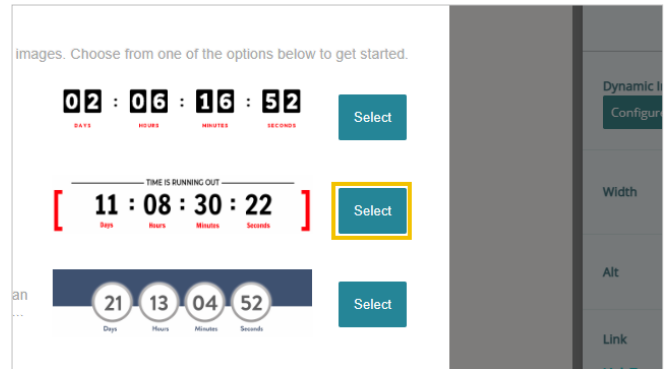
10.1.9.1. Countdown Timers

Click on **Insert Countdown Timer** to add a countdown timer to your email.

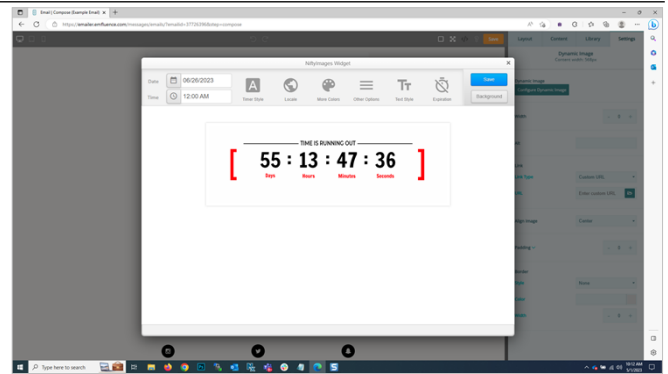


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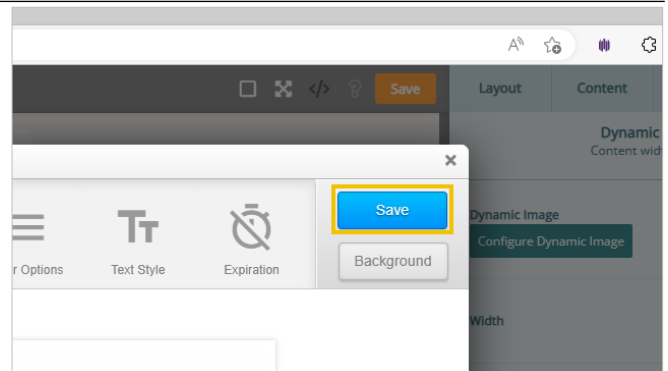
Click on **Select** to choose from the different types of timers available. You will be able to edit fonts and colors on the next step.



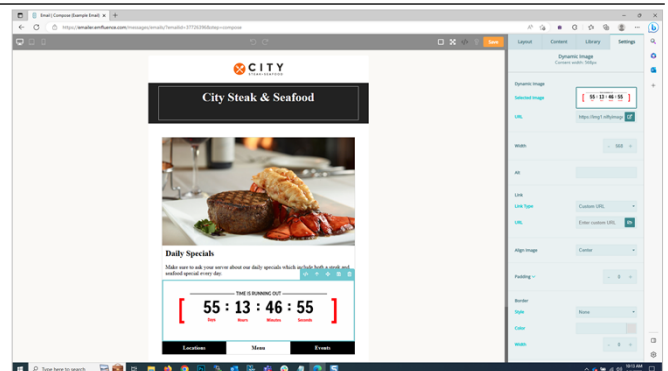
Change the date and time to when you wish the countdown to expire. Change any additional settings to alter the look of the countdown timer.



Click on **Save**

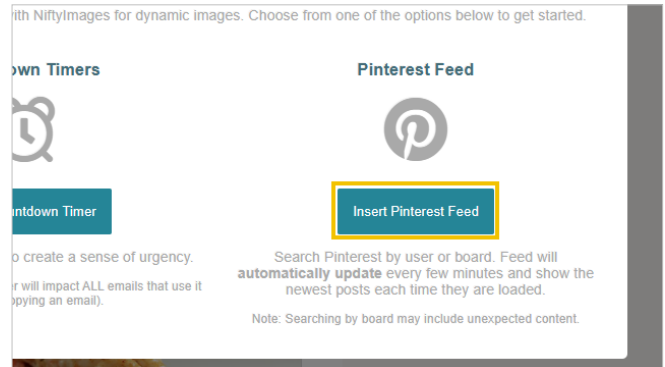


You will now see your Countdown Timer inserted in your email.

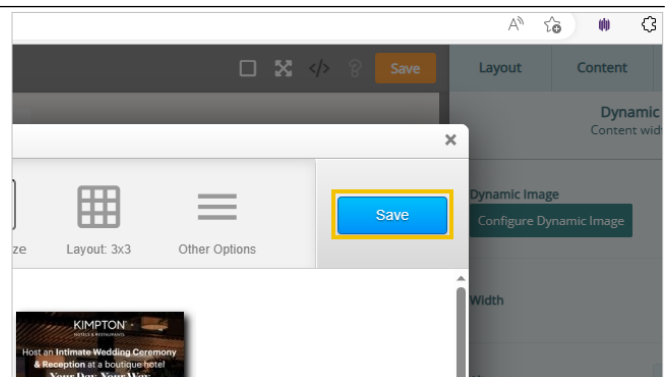


10.1.9.2. Pinterest Feed

To choose a Pinterest Feed, click on **Insert Pinterest Feed**.

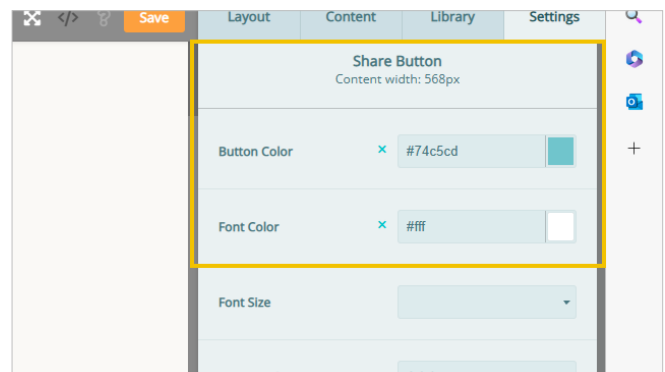


Search for a user or board you wish to create a Pinterest Feed for. The feed will be created automatically. Click on **Save** to insert your board into your email.



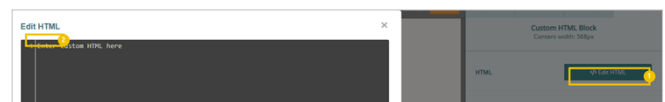
10.1.10. Share Button (Email Only)

You may add a **Share button** to your email to provide ways for your recipients to share your content across different channels. Under the Share Button Settings, you can set Button Color, Font Color, and Padding options.



10.1.11. HTML Element

Using the Custom HTML element, you can insert HTML into your email in a specific section. NOTE: Not all HTML will work in an email, and some may not be allowed by emfluence.



1. **Edit HTML:** Click HTML to launch the Custom HTML window.
2. **Enter HTML:** Enter your custom HTML here. NOTE: Not all HTML may be allowed by emfluence. When finished, click Save & Close.

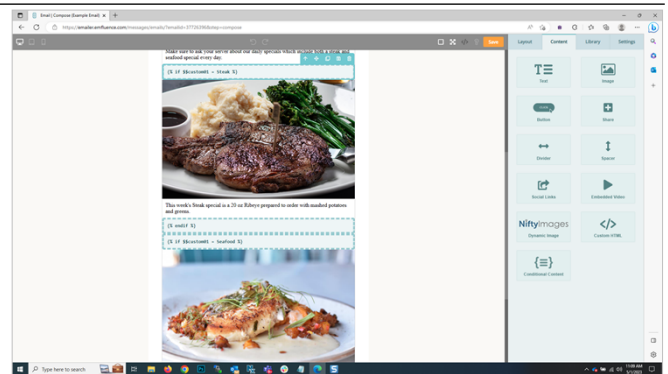
10.1.12. Conditional Content

Choose which content contacts may receive based on saved data on their contact record. To test, read your logic as if it was a sentence to make sure it makes sense (example: Where custom 1 equals Steak).

1. **Value 1:** The data point we are looking at in your logic.
2. **Operator:** Choose from Equals, Does Not Equal, Less/Greater Than (and or Equal To), In, or Not In.
3. **Value 2:** The value you are looking for in the field specified.



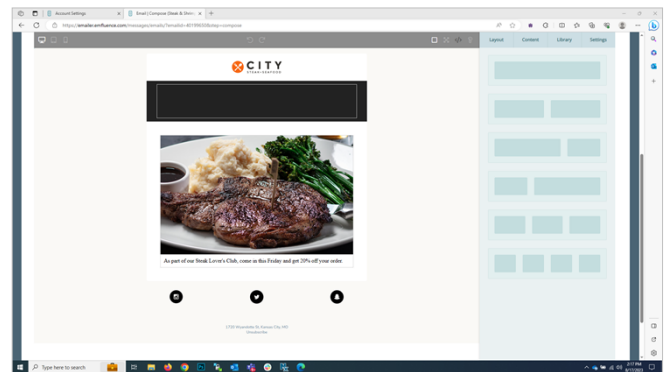
You can drag any elements between the If and End If statements. You can use multiple If and End If statements, or instead use an If and a Then for all those who don't match a single If statement.



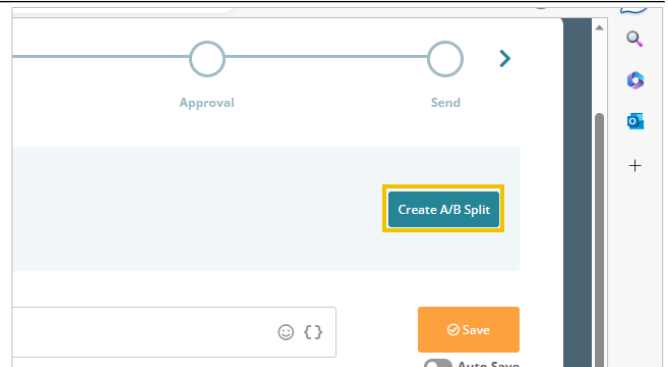
11. Segmentation, Variables & Conditional Content

11.1.A-B Testing

You can use A/B Split to test different messaging to your contacts. Built into manual email sends, you can create multiple copies of an email. Certain segments of the groups chosen will receive one of your emails with the remainder getting the email deemed to have performed best in your testing.

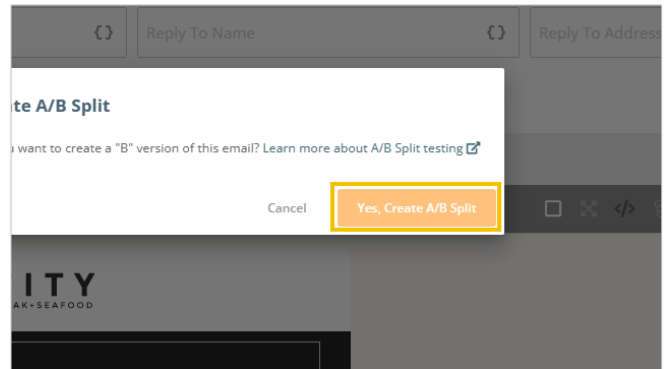


We suggest first making one version of your email, then clicking **Create A/B Split**.

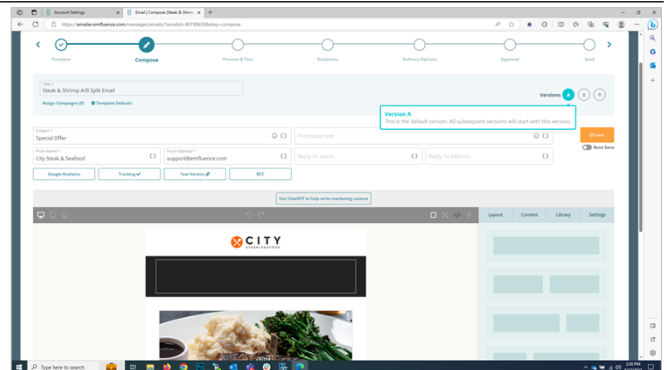


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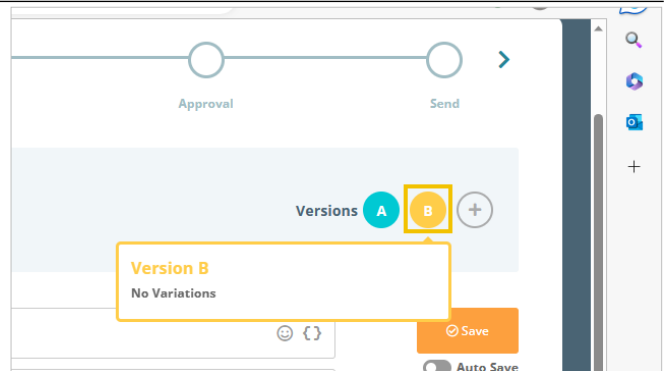
Confirm by clicking on the button **Yes, Create A/B Split**. You can create up to 5 different versions of your email following these same steps.



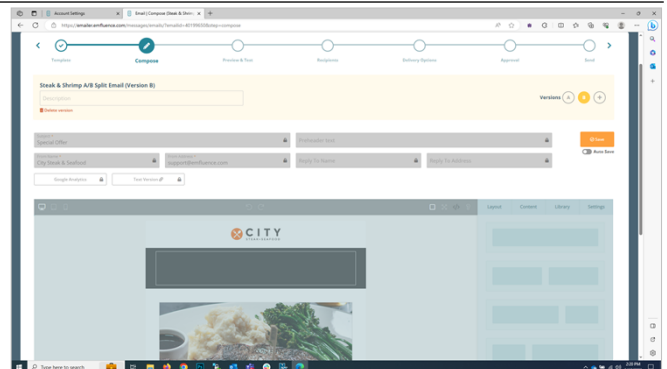
Your original email will now become your A version. You can toggle between versions, to edit them individually by clicking on the letters of each version. To create a third version, click the plus sign and confirm.



To edit your B version, click on **B**.

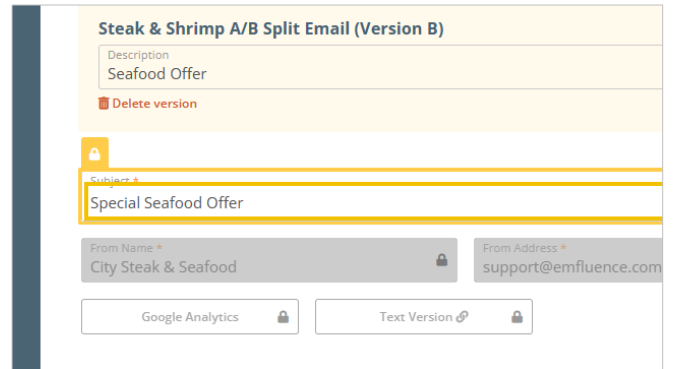


When you load your new version for the first time, all content will be locked. Click into any section of the email to unlock it and change the content.



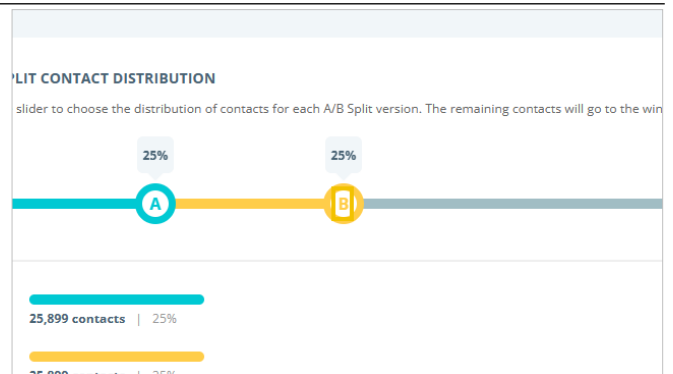
emfluence Help Section

Now unlocked, you can edit the content just as you would any email.

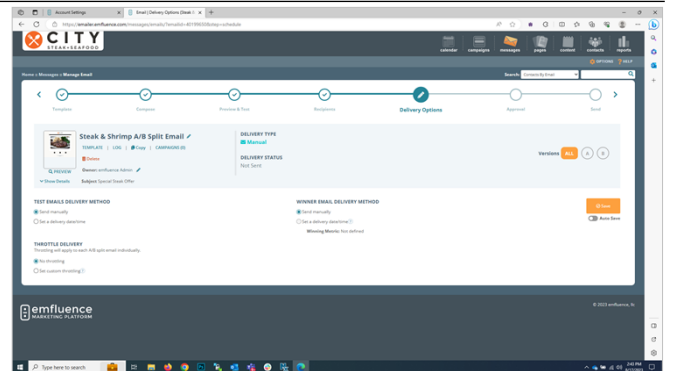


You can preview all versions of the email on the **Preview** step. Advancing to the **Recipients** step, you will choose your group and then set the size of the segments.

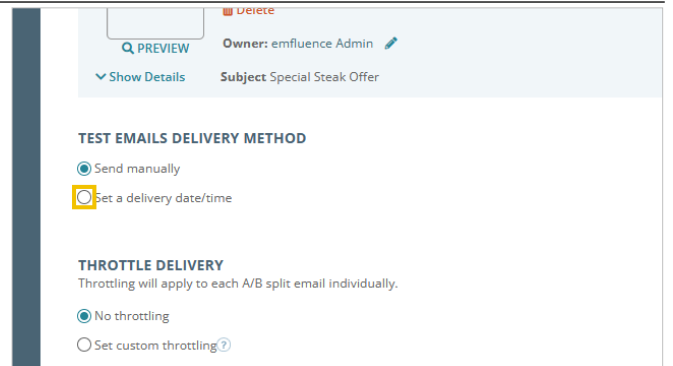
Contacts will be dispersed randomly into the different segments with a section being held out for "winning segment." You can edit the size of each segment using the sliders provided.



On the Delivery Options step, you can choose to send now or schedule your send. If you schedule your send, you will also unlock the ability to schedule your winning email. If you choose not to schedule your winning email, you can still manually send it on your own.



To set a delivery date and time, click the radio button for **Set a delivery date/time** under the TEST EMAILS DELIVERY METHOD menu.



emfluence Help Section

Choose a date and time in the future, and then click on **Apply**.

The screenshot shows a form titled "Schedule Test Emails Delivery". It includes a "Send Date" field with the value "8/21/23", and three dropdown menus for "Hour" (set to 8), "Minute" (set to 00), and "AM/PM" (set to AM). There is a "Clear" link below the dropdowns. At the bottom, there is a "Current server time: 8/17/23 2:43 PM (CDT)" and two buttons: "Cancel" and "Apply". The "Apply" button is highlighted with a yellow border.

To schedule your winning email, check the radio button for **Set a delivery date/time** under WINNER EMAIL DELIVERY METHOD.

NOTE: You cannot schedule a winning email unless you first schedule the delivery of your initial segments.

The screenshot shows the "WINNER EMAIL DELIVERY METHOD" section. It has two radio buttons: "Send manually" (which is selected) and "Set a delivery date/time" (which is highlighted with a yellow border). Below the radio buttons, it says "Winning Metric: Not defined".

Select your date/time for delivery which will need to be after the time scheduled for your initial segments.

Next, choose your winning metric which can be either the highest view/open rate, the highest click rate, or the highest click-to-view rate.

NOTE: If you don't schedule the winning email, you can manually choose the winner on any criteria you wish.

Finally, click on **Apply**.

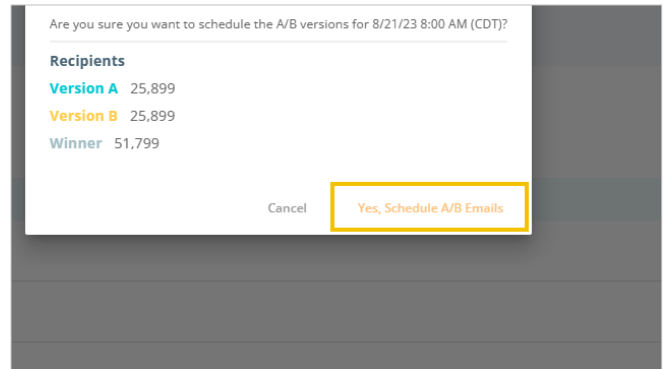
The screenshot shows the "Choose the metric that will decide the winning version" section. It has three radio buttons: "Unique view percent" (which is selected), "Unique click percent", and "Click-to-view rate". At the bottom, there are "Cancel" and "Apply" buttons. The "Apply" button is highlighted with a yellow border.

Proceed to the **Send** step and click to **Schedule A/B Emails**.

The screenshot shows a "Versions" section with three buttons: "ALL" (highlighted in orange), "A", and "B". Below this, there is a large orange button labeled "Schedule A/B Emails".

The platform will provide a breakdown of your split. Review and click **Yes, Schedule A/B Emails**.

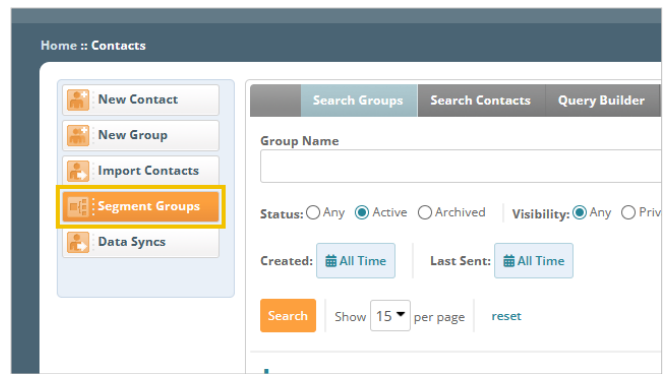
Your email is now scheduled. If you chose not to choose a winning metric and schedule the winner email, don't forget to return and manually choose your winner to complete the send.



11.2. Segment Groups

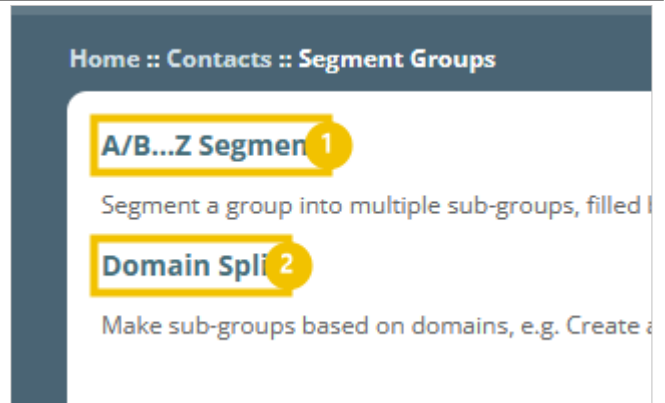
Before proceeding, you might want to check out emfluence's A/B Testing (available to randomly split your list within the email) and decide if it fits your segmentation needs.

If A/B Testing does not cover your use case (for example, you need your emails to go out on different days or different times), you can manually segment a group in the Groups Section by clicking on **Segment Groups**.

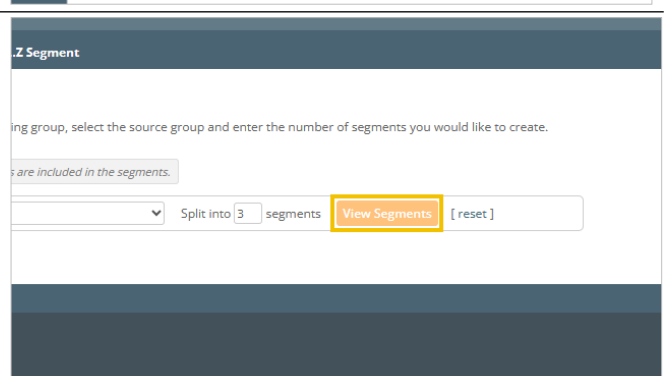


For your segmentation, you can either choose a random A/B split or choose a Domain split.

1. **A/B...Z Segment:** Randomly split an existing starting group into separate segments.
2. **Domain Split:** Make segments based on domains.



To create an A/B Split, choose your starting group from the dropdown and then type the number of random segments you wish to create. Each segment will be created as a separate emfluence group. When finished, click on **View Segments**.



emfluence Help Section

On the next page, you can make changes by editing the group names and counts before saving and creating the groups.

1. **Group Name:** You can edit the name of your groups.
2. **Percent:** You can edit the percentage size of your groups. By design, your groups will be of equal size.
3. **Count:** You can edit the contact number in the groups. By design, your groups will be of equal size.
4. **Create Segments:** Click to save and create your segmented groups.

Group Name	Percent	Count
1) All - Segment A	33.33%	34533
2) All - Segment B	33.33%	34533
3) All - Segment C	33.33%	34533
*Totals		100% 103599
Remaining		0% 0

*Totals must be less than or equal to 100% of the source list count

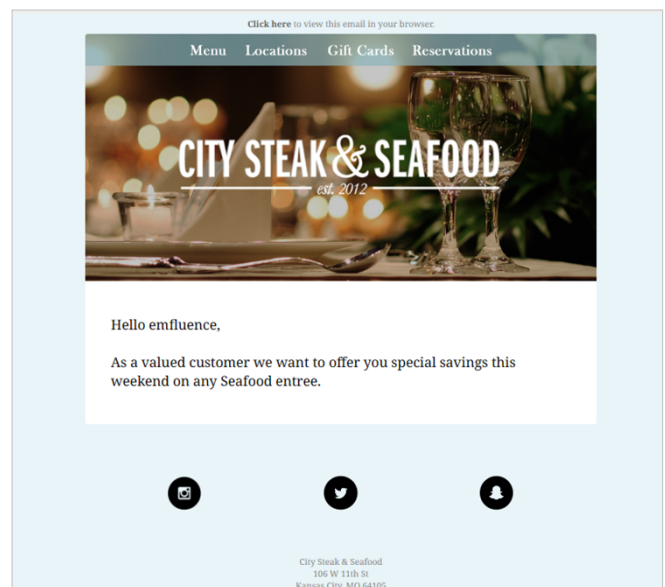
As with A/B Split, in Domain Split you will start by choosing the source group and then make choices on what to do with your results.

1. **Domain:** Choose the domain you wish to create a segment for.
2. **Group:** Either choose a pre-existing group from the Destination Group dropdown or type the name of the new group you wish to create.
3. **Remove contacts from source group:** Optionally, you can remove these contacts from your starting group. If the box is not checked, no changes will be made to the source group.
4. **Submit:** Click Submit to save and create your group. You will find your original group and your segmented group below with contact counts for each.
5. **Group Link:** Click to go to your group.

	Total Members	Active Members
scribers	103,937	103,599
scribers	53,565	54,001

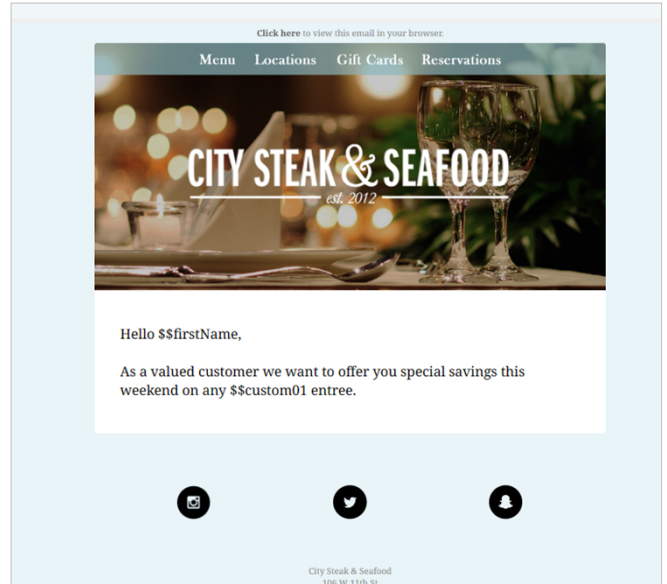
11.3.Using Variable Content

Variable content can be used to customize your messaging by pulling saved data from a contact's record. This data can come from standard fields such as email, first name, last name, etc. as well as custom fields specific to your platform account.



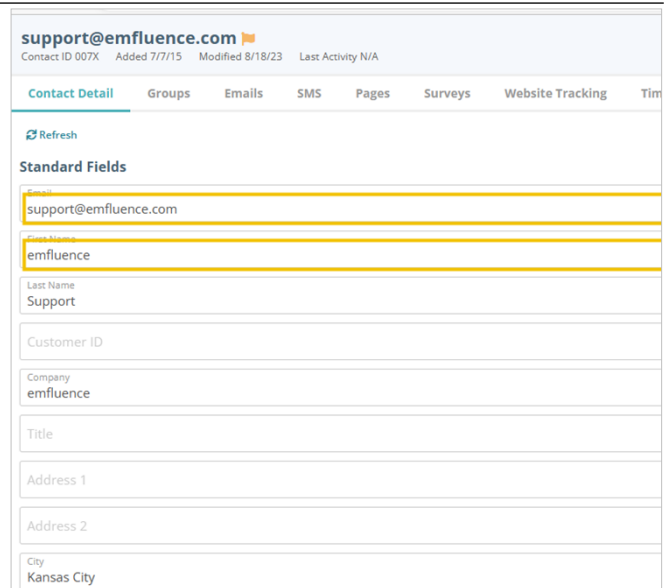
emfluence Help Section

By inserting the variable placeholder in your email, whatever value is saved in that field on an individual's contact record is what will be filled in when they receive the email

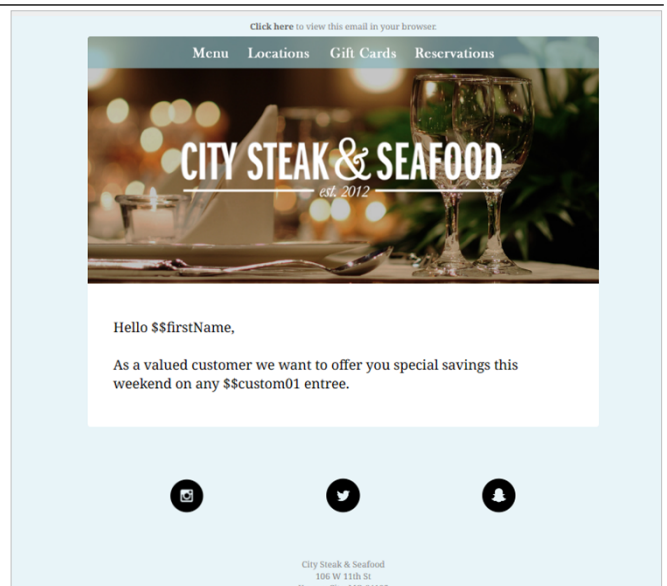


On an import, manual save, API call, or data sync, data is saved on the contact record.

1. **Email:** The saved email address for this contact.
2. **First Name:** The saved first name value for this contact.

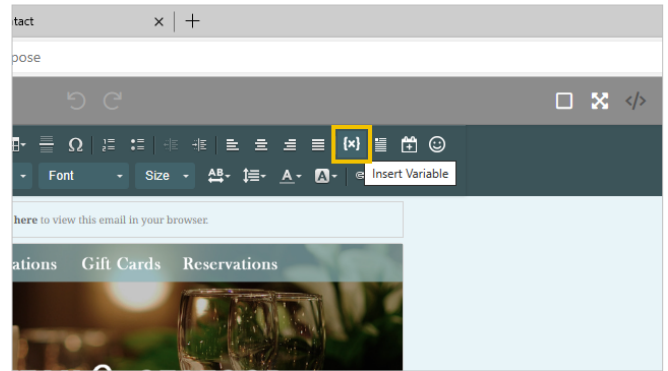


When using variables, you will insert the variable to the corresponding data point. Whatever is saved in that field is what will be inserted into the email.

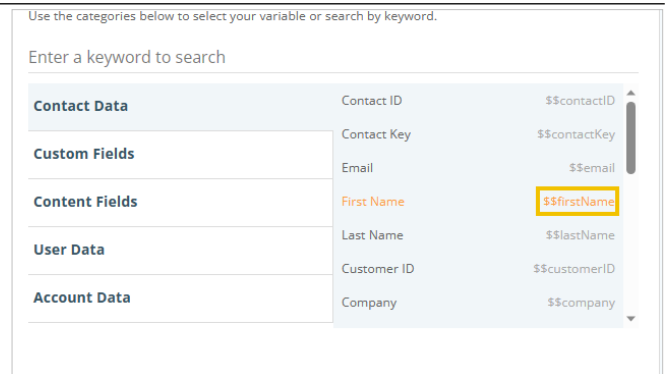


emfluence Help Section

To insert a variable inside a text element, first place your mouse where you wish the variable to go. Next, click on the **Insert Variable** icon in the text editor menu.

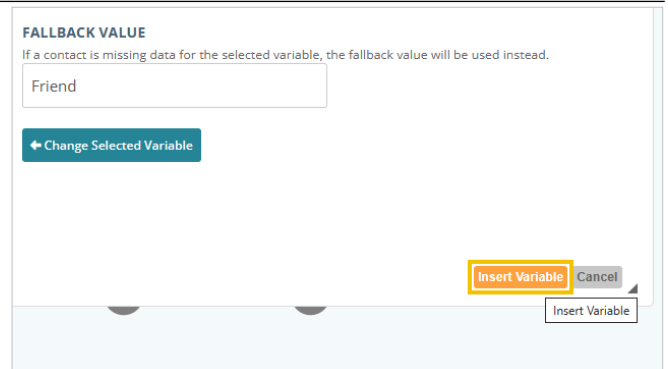


Find and choose the variable you want from the pop-up menu. In this example, we want to insert the contact's First Name. This is a standard field that can be found under Contact Data. Find and click **\$\$firstName**.

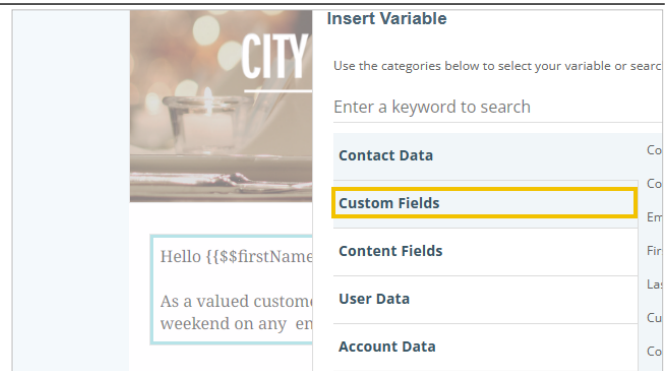


You will be prompted to choose a **Fallback Value**. If no value is saved in that field on a contact's record, in this example First Name is blank, the platform will use the **Fallback Value**. You are not required to use a Fallback Value. However, if you do not use a fallback, a blank entry will insert a blank space into your email.

Type in your Fallback Value. Then, click **Insert Variable**.

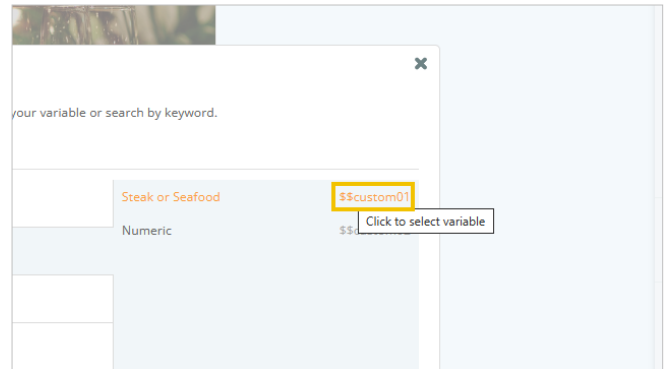


Custom Fields are located in the Options menu. These are non-standard data points created by members of your account to save specific data on the contact record. To use one as a variable, click on the menu for **Custom Fields** after clicking the Variable icon.

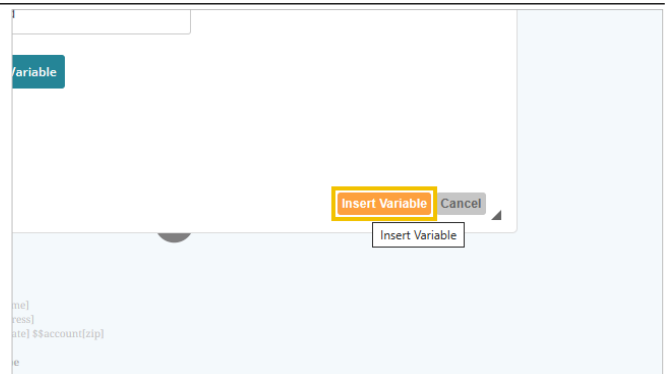


emfluence Help Section

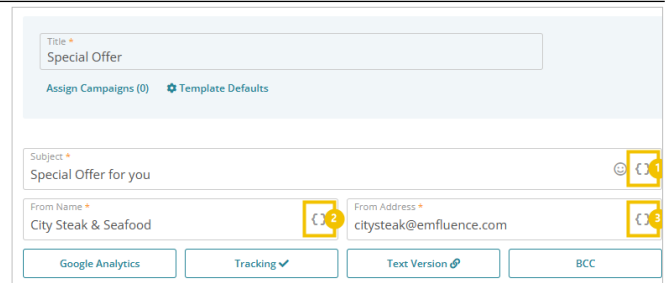
As with standard fields, the menu will show both the friendly name of the field and the variable ID. While standard fields have a variable ID similar to the name of the field, custom fields are simply numbered. To add your custom 1 field, find and click on **\$\$custom01**.



Type in your fallback value and click on **Insert Variable**.

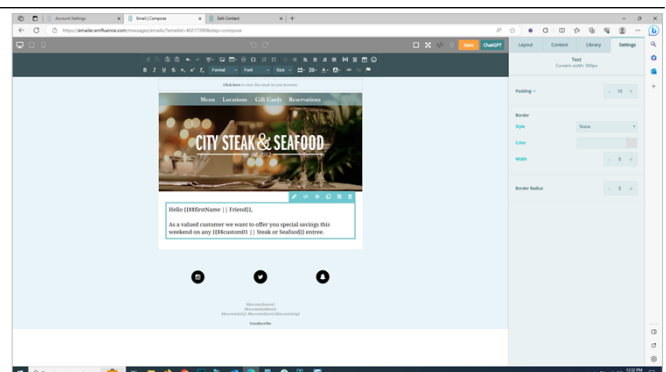


Variables can also be inserted into the Subject Line, the From Name and From Address of your email, and also the Reply To Name and Reply To Address of your email. Be careful of using variables for email addresses and make sure all recipients have a valid value on their records.



1. **Variable Picker:** Click to insert a variable into the subject line of your email
2. **Variable Picker:** Click to insert a variable into the from name of your email. NOTE: Make sure you use fallback value as emails CANNOT be sent without a from name.
3. **Variable Picker:** Click to insert a variable into the from address of your email. NOTE: The value on the contact record must be a valid email address and must be from a domain you are permitted to send from in the platform. Any email without a valid and supported email address will fail to send.

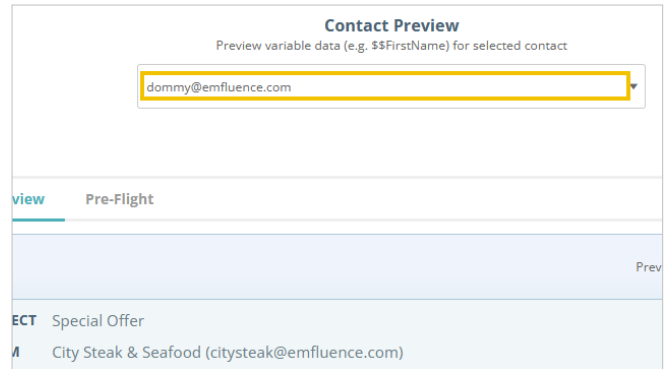
You will now see the variables inserted into your email. After saving, you can advance to the Preview step and check your contacts to confirm the values are correct.



On the Preview step, you can test different contacts using the **Contact Preview** dropdown. With each contact you will see what values are used for each variable in your email.

While previewing as another contact, you have the ability to send a proof of that email to yourself, another member of your team, or to a testing group.

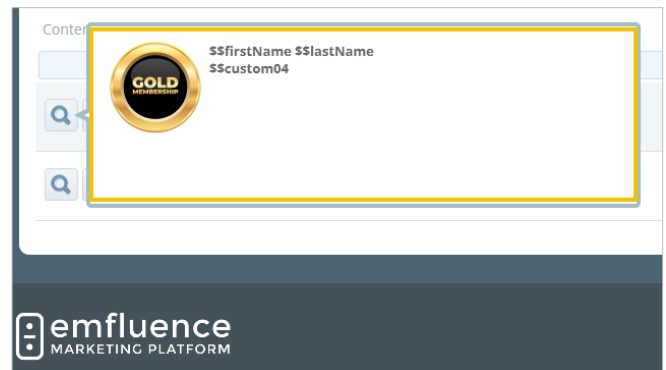
Always test when using variable content.



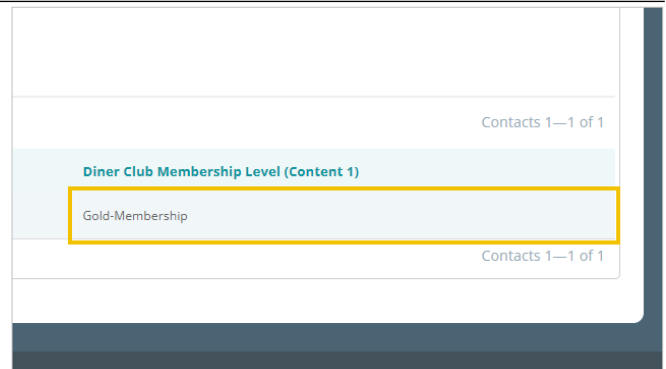
11.4. Variables & Conditional Content

11.4.1. Content Variables

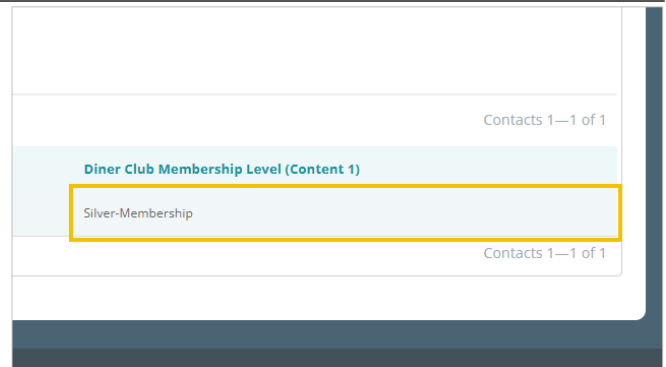
Content Variables work by creating **Content Blocks** and assigning a specific block to each contact on their contact record. When using a content variable, whatever block is assigned to that contact will be inserted into the content.



In this example, anyone who has been assigned the **Gold-Membership** block in their **Content 1** value will have that block inserted into their email.

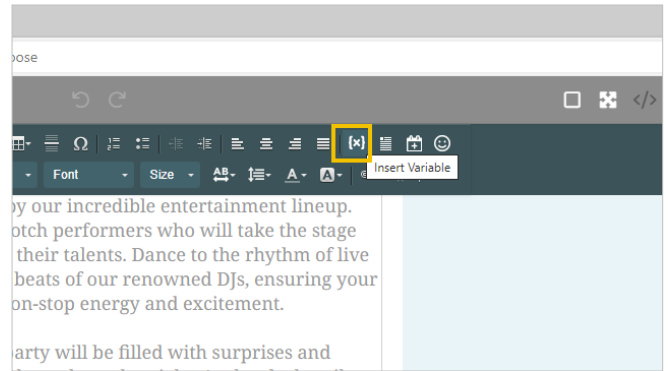


And anyone assigned with the **Silver-Membership** block will receive that block of content.

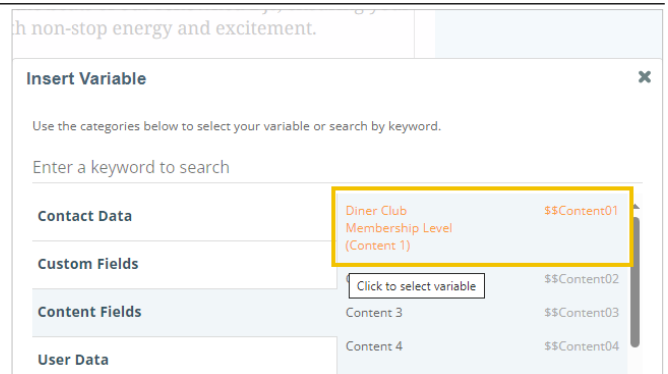


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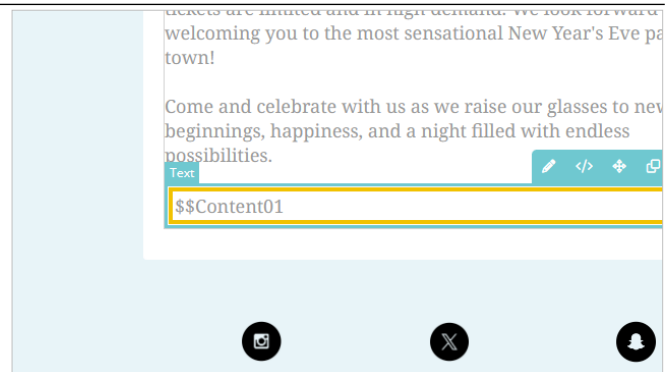
In your email, you can insert Content Variables the same way you insert other variables through the use of the **Insert Variable** picker.



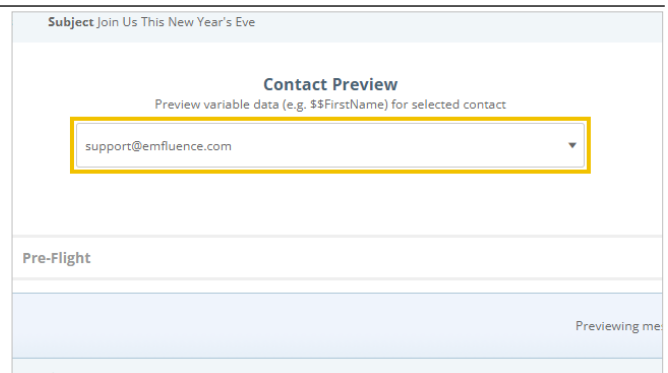
In the Content Fields menu, choose the Content Variable you wish to use and Insert.



The Content 1 variable will be inserted into your content.

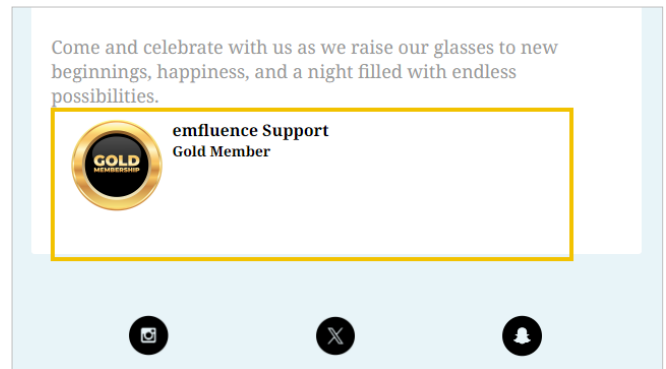


On the Preview step, we can preview as any contact. Choosing a contact with the Gold Member block assigned we can see what their content will look like.



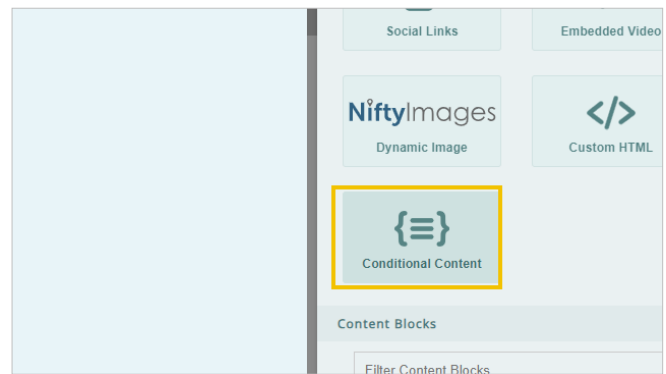
You will now see that block of content applied.

Content Variables using Content Blocks are good way to insert reusable data allowing you to easily insert those blocks whenever you need. For more one-off send content, you may want to instead consider using Conditional Content.

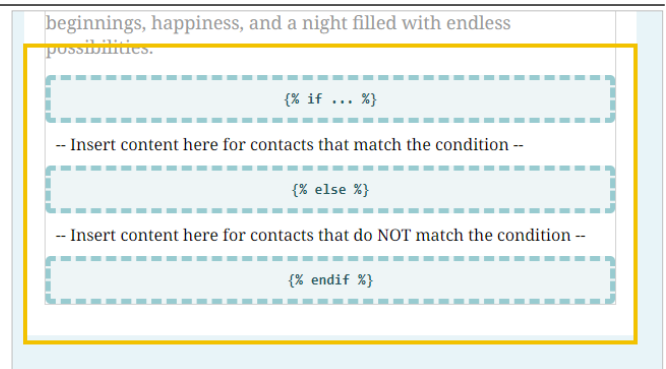


11.4.2. Conditional Content

Rather than creating separate blocks, **Conditional Content** allows you to create different sections of content to show users based on a query in your email. To begin, drag a Conditional Content element from the right-sidebar into your email.

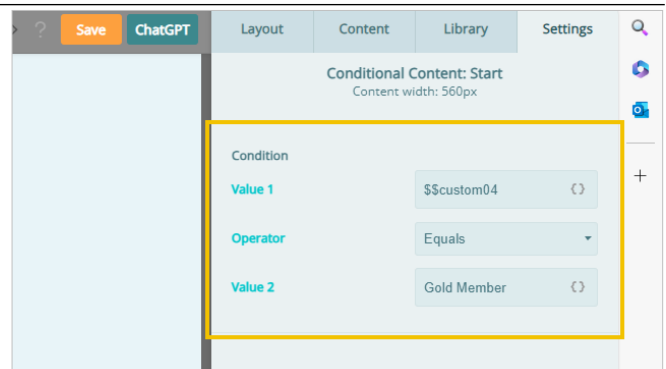


Conditional content will insert a multi-step block into your text. The top section will match the query you choose, and anyone matching that query will get whatever content (images, buttons, text, etc.) which you add to that block.



When clicked into the **Conditional Content: Start** line, you will be able to access the miniature query builder in the **Settings** tab. In order for you to make use of conditional content, you must be able to construct a simple query based on data within your account.

In this example, anyone whose custom 4 value Equals Gold Member will receive the content we will add underneath the query.

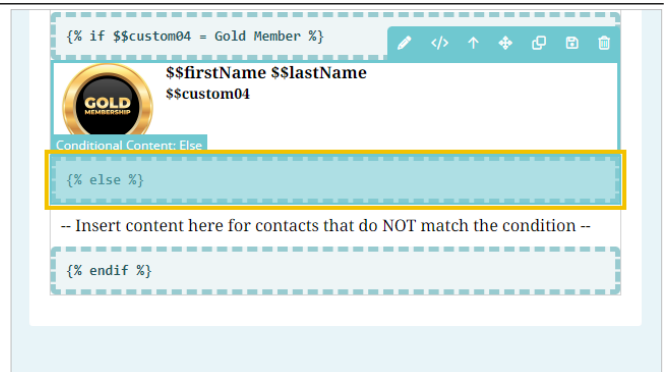


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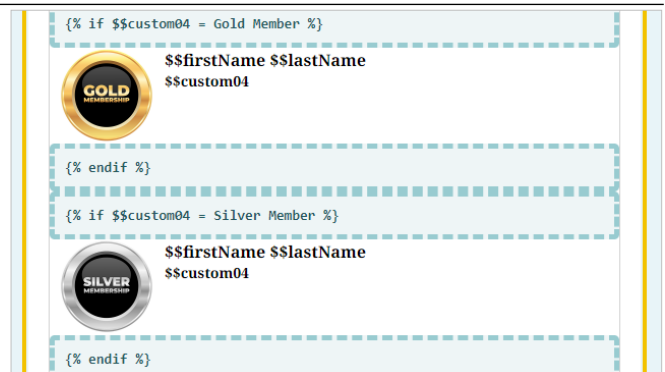
Next, add any content you want inside the query. This can include layouts, images, text, buttons, etc.



By default, Conditional Content is set up to use an If / Then / Or Else query. This allows you to show content to a group of people who match your query but show completely different content to other contacts. Any content added under the Else section will be shown to those contacts who do not match your query.

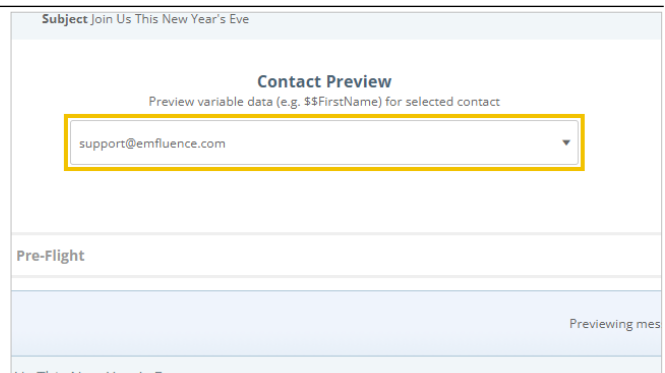


Another option is to string multiple If / Then statements together. Rather than sharing one piece of content to a subset and another piece of content to everyone else, this allows you to create separate queries for different content set up for different contacts.

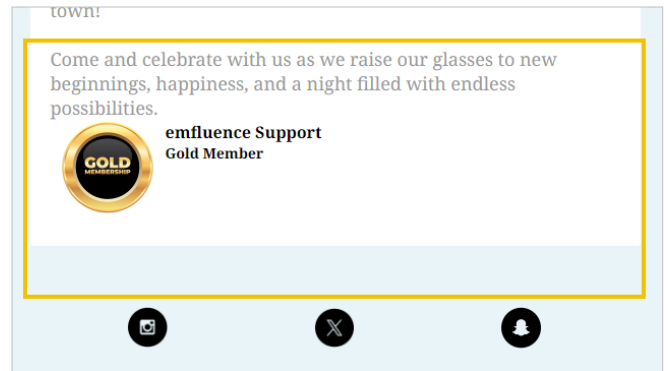


In this example, contacts matching the first query will receive the Gold Member content. Contacts matching the second query will receive the Silver Member content. Contacts not matching either will not receive any additional content.

On the Preview step, you can preview as different contacts to see which piece of conditional content they will receive.



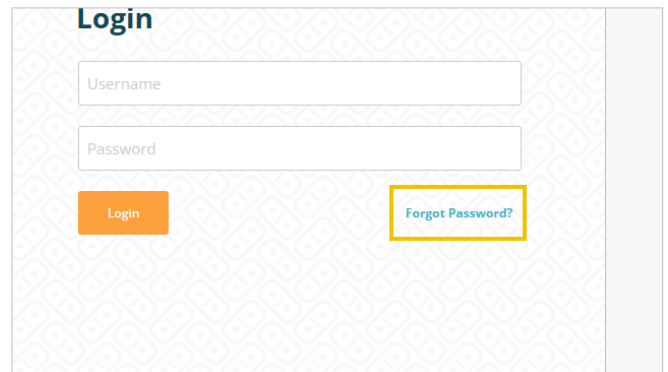
Scrolling down in your preview, you should find contacts that match the Gold Member query receiving the Gold Member content, contacts matching the Silver Member query receiving Silver Member content, and contacts matching neither receiving no additional content.



12. Tips & Tricks

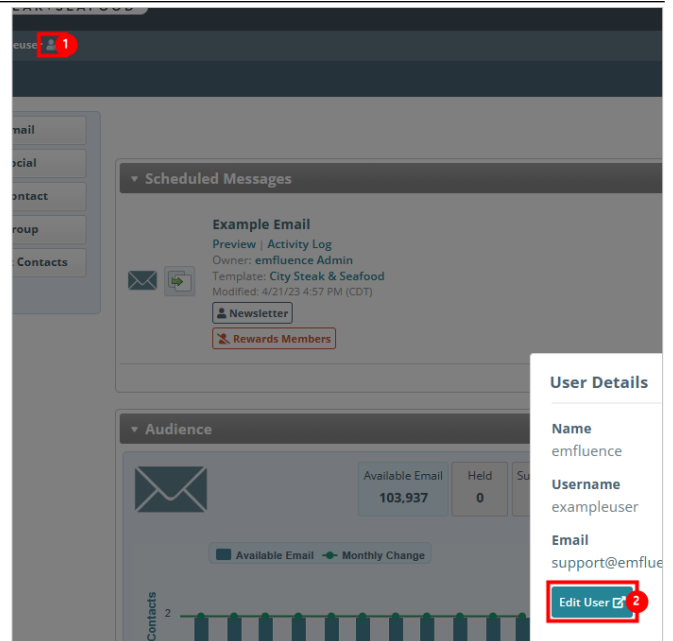
12.1. Reset Your Password

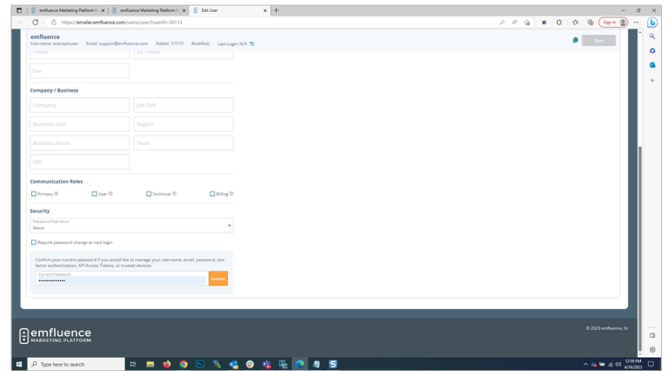
If you can't remember your password you can use the **Forgot Password?** link on the sign-in page. This will trigger an email to be sent to you where you can choose a new password. The password must be at least 12 characters in length, have at least 1 character which is not a letter, and not be a previously used password.



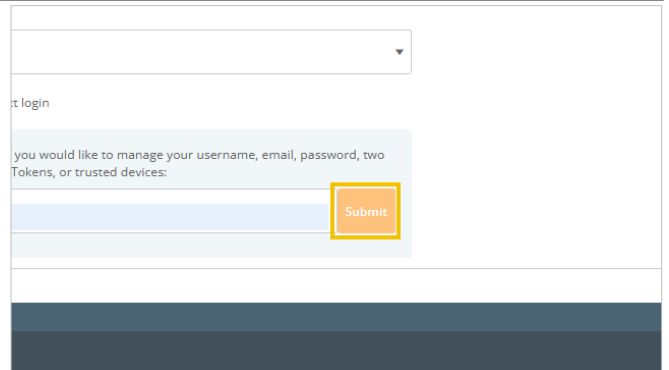
If you know your password, but need to change it, you can do this after logging into the platform by clicking the icon next to your username at the top of the page. In the pop-up, click the Edit User button.

1. **User Settings:**
2. **Edit User:**



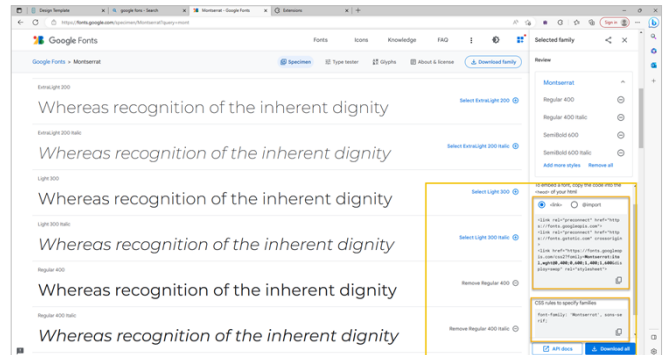


Scroll down the the Security section and type in your password. Hit Submit to unlock the section which will allow you to change your password and email address, create API tokens, and set up multi-factor authentication.

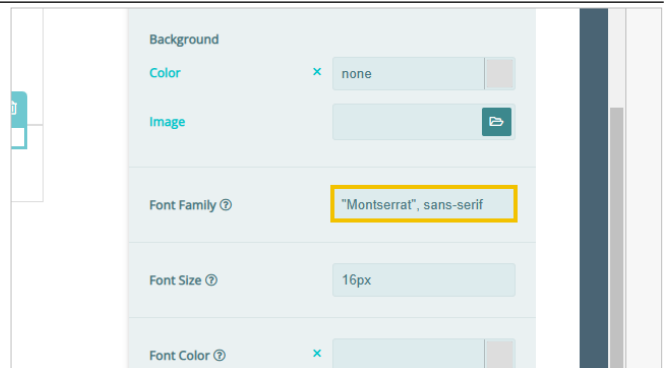


12.2.Set Default Font

You can add a default font to your email template. You can also add default templates to landing pages made in the Drag & Drop Editor. For a standard font you will simply need the font name and family. For a Google Font you will also need the snippet of code for the font you can find on fonts.google.com.

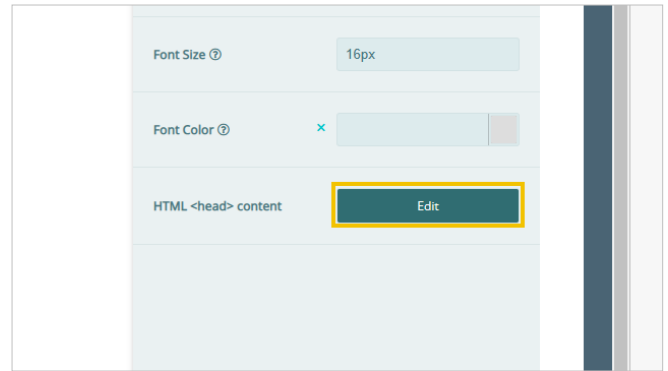


In **Landing Pages**, when creating a page in the drag & drop editor, you can add a default font family under the Page tab in the right-sidebar settings. Paste or type your font family

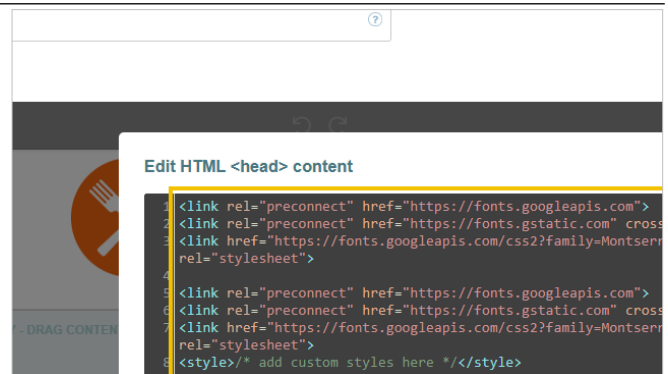


emfluence Help Section

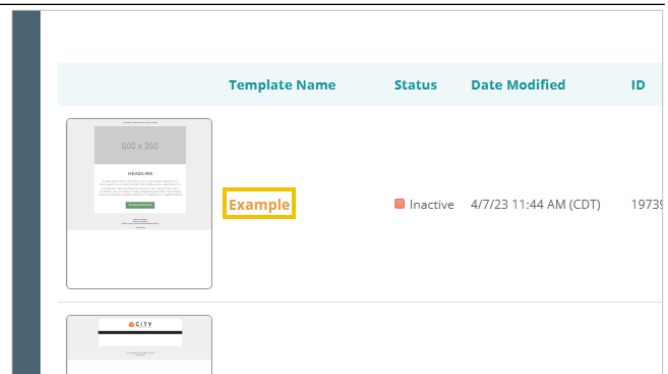
If you are using a Google Font, you will also need to add the Google code in the HTML head content of your page. Click **Edit** to add the code



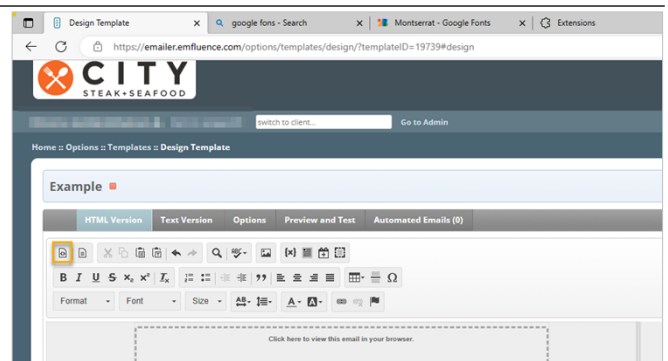
Paste the code from Google Fonts into the head section and click **Save**



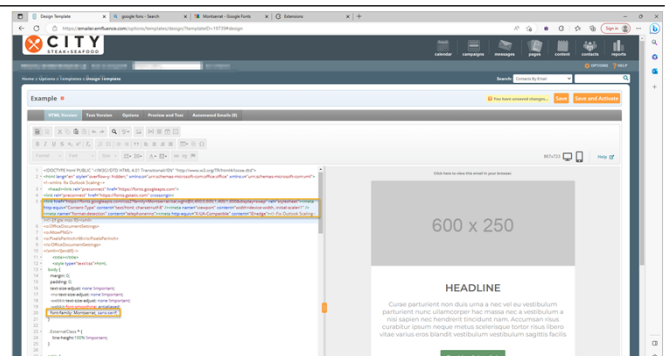
You can also set default fonts on email templates. In **Template Builder**, click on the **title** of the template you wish to edit



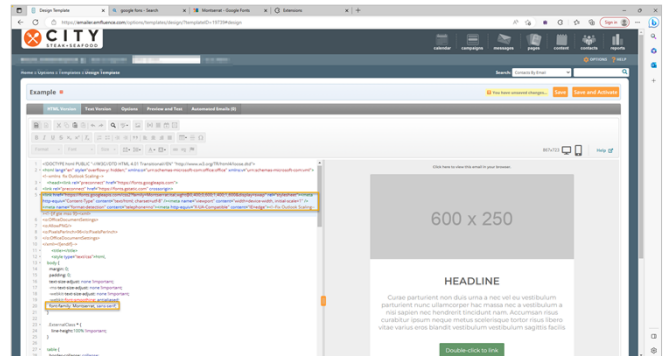
Click on the top-left icon of the editor to enter the code view and edit the code of your template



In the code view, add the font family inside the body tag of your CSS. If you are using a Google Font, you will also need to paste the Google code in the head section as well.



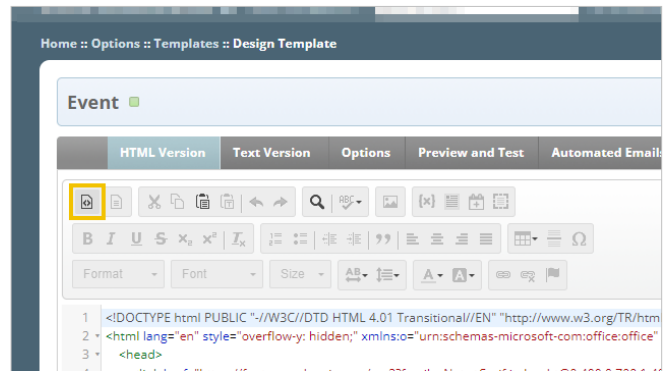
In both examples, you can still apply different fonts on specific text which will overwrite your default. If you don't see your font change after adding your default font, check to confirm sections of you page or email don't have a different font directly applied to them.



12.3.Preventing Stacking on Mobile

All modern emfluence templates are responsive by default. This means columns will stack on mobile for easy responsiveness. However, you may have tables in a template you don't wish to stack by default. To do so, you can apply the no-wrap class in your template.

Inside template builder, when editing a template, click the **Source** button to view your template's HTML

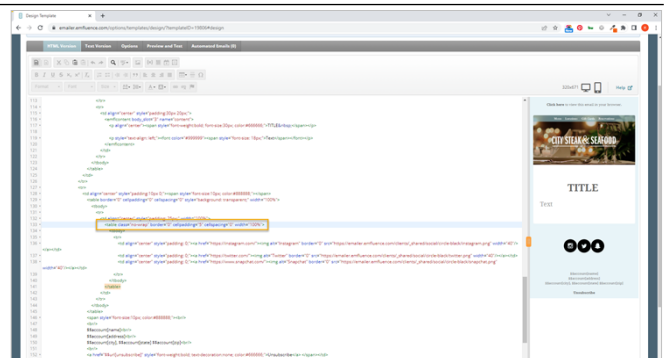
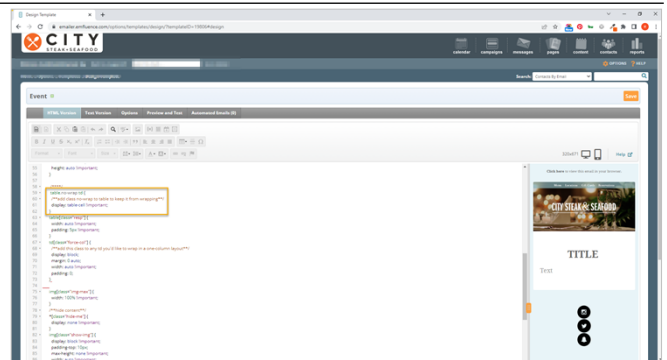


If your template was designed by emfluence, it should have a class setting already listed in the CSS of the head section of your template.

It will look like this:

```
table.no-wrap td {
  /**add class no-wrap to table to keep it from wrapping**/
  display: table-cell !important;
}
```

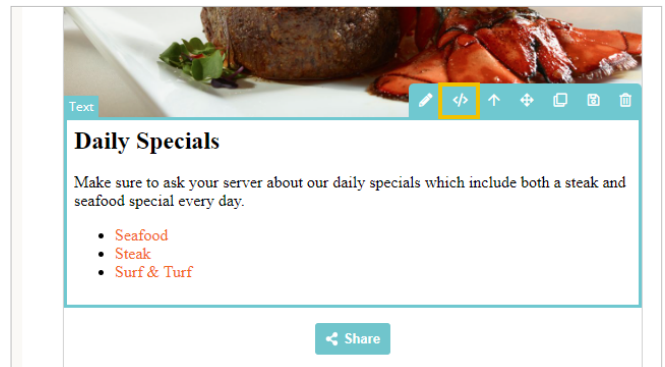
Scroll down to the table you don't wish to wrap on mobile, and add **class="no-wrap"** to the table you don't wish to stack on mobile. In the preview pane you will see the table no longer stacks on mobile.



12.4.Changing Color on a List

Applying a font color to a bulleted or numbered list will apply to the list itself, but not the bullets or numbers of the list by default. However, you can force the color to apply.

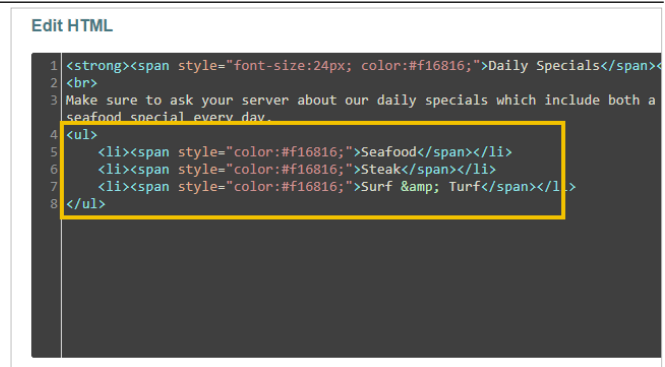
On your text element, click the code icon in the menu to launch the HTML editor.



In the code view, you will see the code for your list. You will notice the individual lines of your list have a hex color applied to them as part of a style tag. You will apply this same styling to the opening tag of the list.

If it is a numbered list, the list will be wrapped in ul tags.

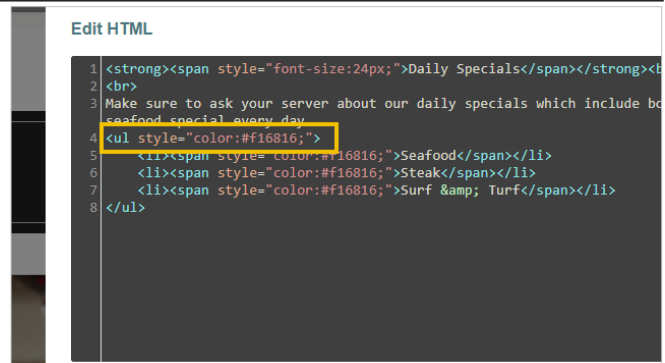
If it is a bulleted list, the list will be wrapped in ol tags.



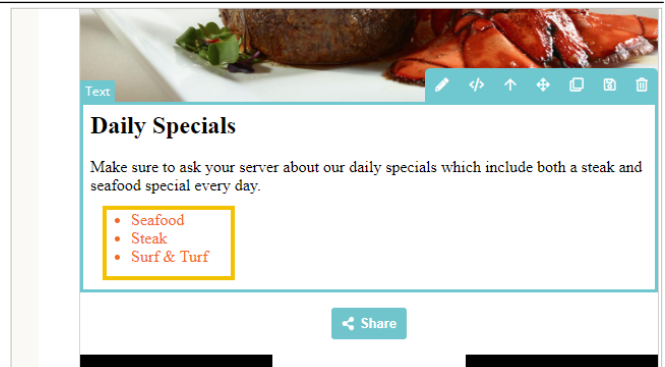
Apply the color style tag used in the separate lines of your list to that top opening tag as well.

Inside the opening tag of the list, add **style="color:#YOURCOLOR;"**

Click Save & Close.



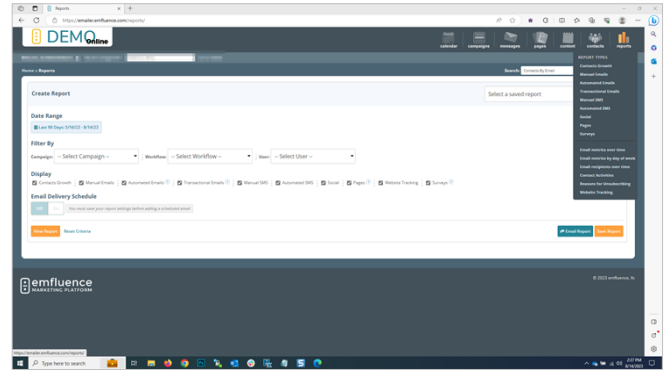
You should see the bullets or numbers now applied with the same hex color as the items in your list.



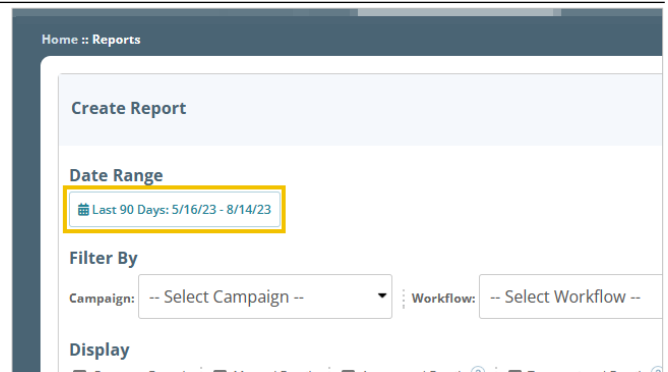
13. Reporting

13.1. Creating a Standard Report

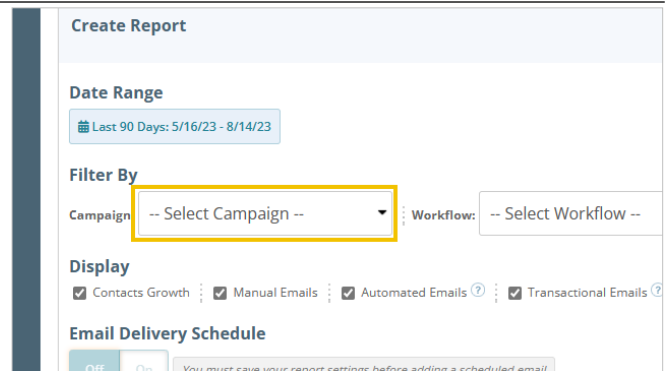
The emfluence Reporting Section can be accessed through the far-right icon on the top of the page. Hovering over the icon will also provide quick links to individual reports.



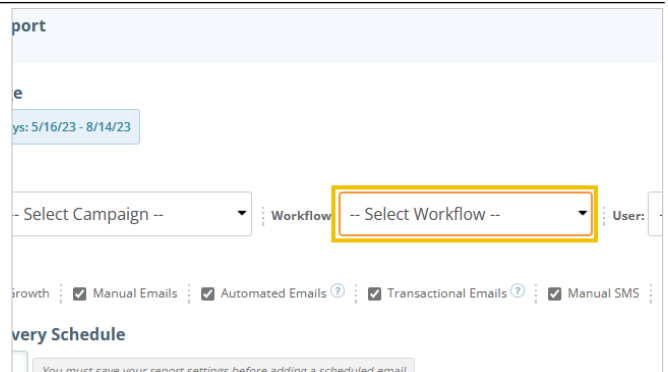
You can edit the time frame of your report using the **Date Range** dropdown. Several pre-set options are available and you can also choose a custom date range.



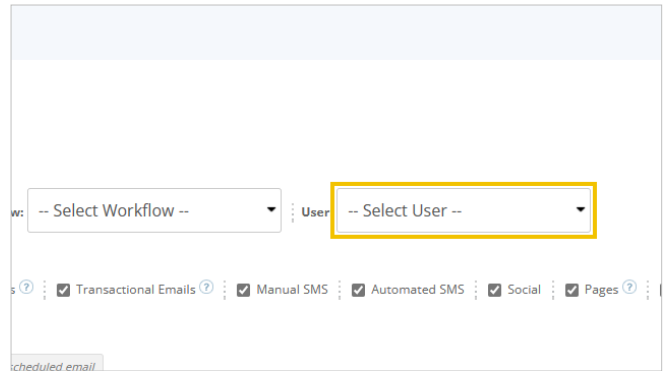
Several filters are available to limit or exclude certain results from your report. You can use the **Campaign** dropdown to limit results to only emails, pages, etc. within that campaign.



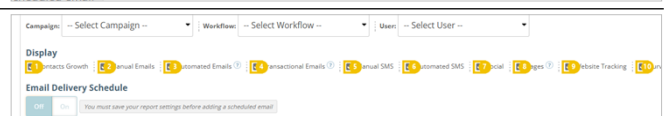
You can use the **Workflow** dropdown to limit the report only to emails within that workflow.



You can use the **User** dropdown to limit results only to items created or now owned by a specific user.



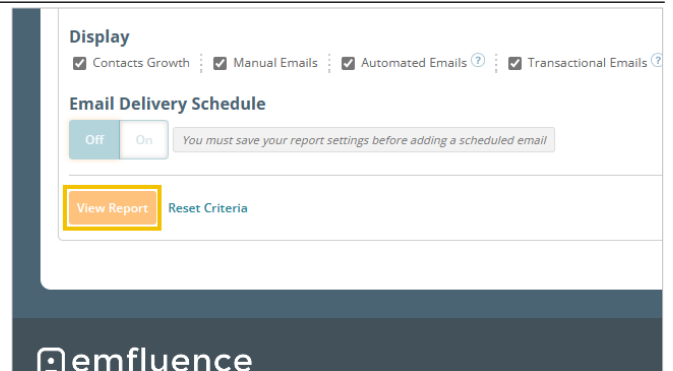
The choice of what items to display on a report can be chosen by checking or unchecking the boxes for different reports. Alternatively, you can use the hover-over menu to pre-select a specific report (such as Manual Emails).



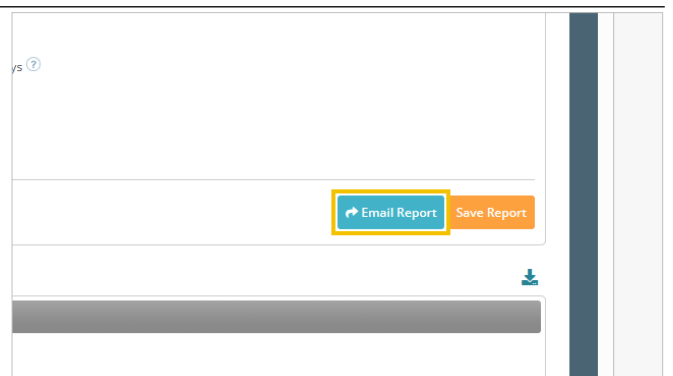
1. **Contacts Growth:** This report will show the number of contacts added, held, and suppressed during the chosen date range. NOTE: Filters for Campaigns and Workflows will not be applied to the Contacts Growth report.
2. **Manual Emails:** This report will show the email metrics for any email sent during the date range selected. Further reporting can be found on the individual email reporting.
3. **Automated Emails:** This report will show the email metrics for any automated emails active during the date range selected. Further reporting can be found on the individual email reporting.
4. **Transactional Emails:** This report will show metrics for any email sent over emfluence's Transactional API endpoint during the date range selected.
5. **Manual SMS:** This report will show the metrics for any manually scheduled SMS messages during the date range selected. Further reporting can be found on the individual SMS reporting.
6. **Automated SMS:** This report will show the metrics for any automated SMS messages active during the date range selected. Further reporting can be found on the individual SMS reporting.
7. **Social:** This report will show the social metrics available for any social message posted during the date range selected.
8. **Pages:** This report will show page metrics for any landing pages active during the date range selected. Further data can be found on the individual reporting for each page.
9. **Website Tracking:** This report will show domain-level website tracking data during the date range selected. More specific data can be found within the website tracking menu.
10. **Surveys:** This report will show survey metrics for any surveys active during the date range

selected. Information on individual survey responses can be found in the individual reporting for that survey.

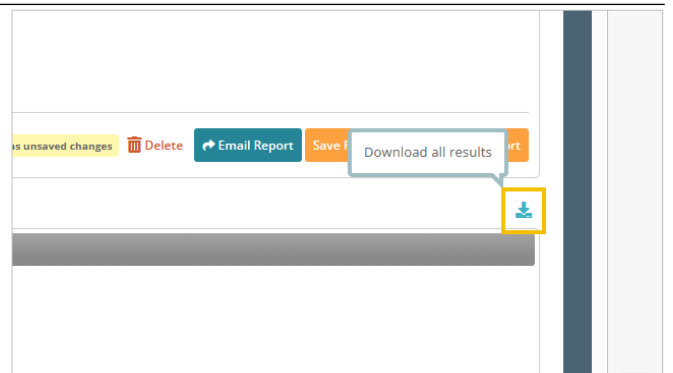
After making your choices on what to include, click **View Report**



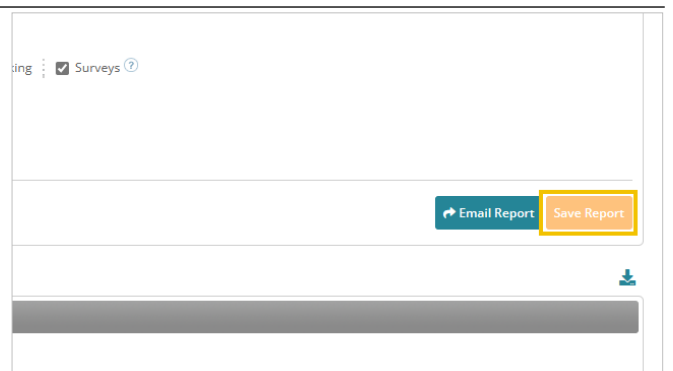
You can use the **Email Report** option to email this report to any user within the platform.



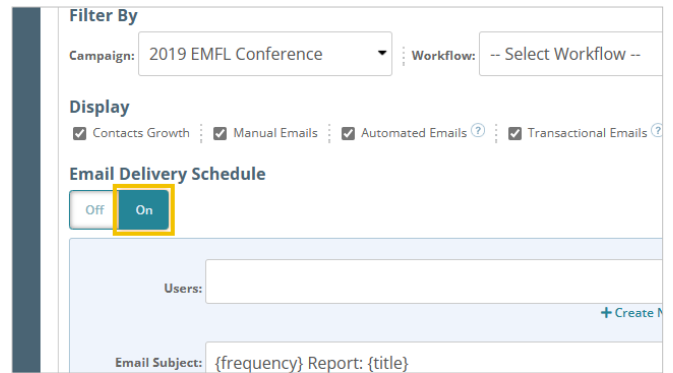
You can download a copy of the report using the download icon



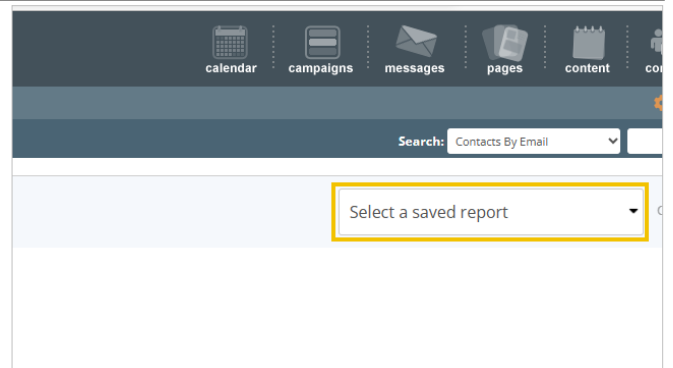
You can also save a copy of the report for yourself by clicking **Save Report** button



Once a report has been saved, you can turn on the **Email Delivery Schedule** to schedule the report being sent to any user of that account on a Daily, Weekly, or Monthly schedule.

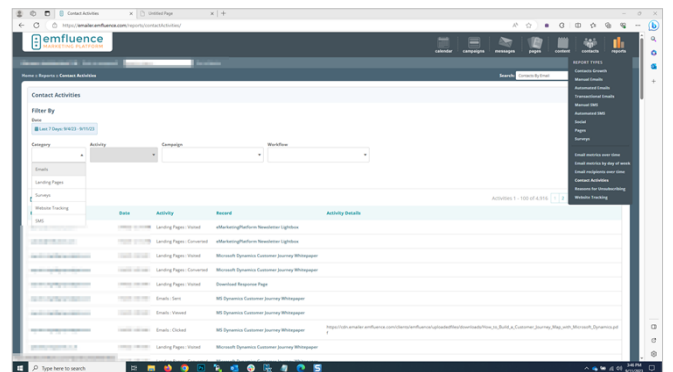


Saved reports can be chosen from the dropdown in the top-right of the Reporting menu.



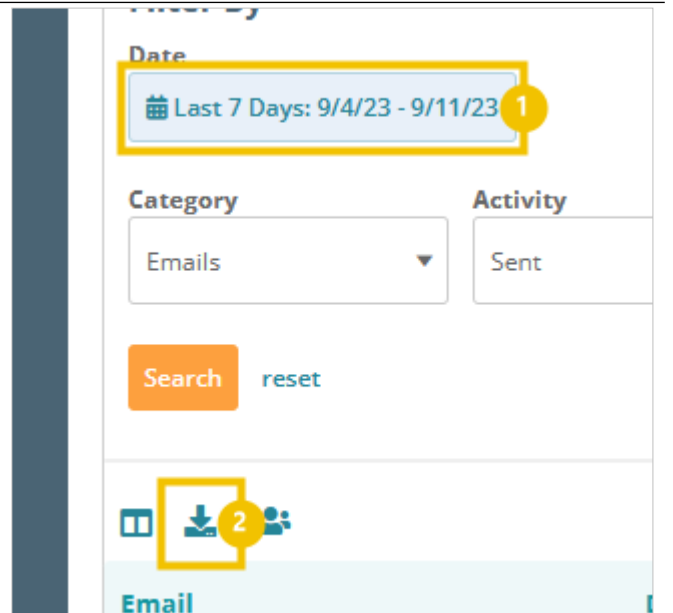
13.2. Contact Activities

Located under the Reports dropdown, the Contact Activities report allows you to view actions taken by contacts across your account within a specified date range.



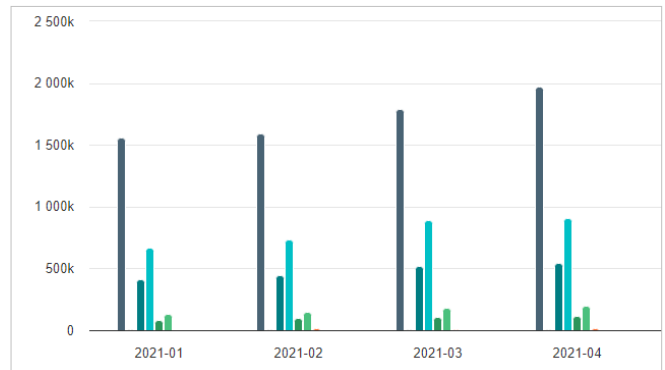
Apply filters to narrow your results such as choosing a category (for example Emails), and an activity within that category (such as emails sent). Optionally further narrow your list by applying campaign and/or workflow filtering as well.

1. **Date Range:** Choose the Date Range and filters below to narrow what activities you wish included in your report.
2. **Download:** Download your results

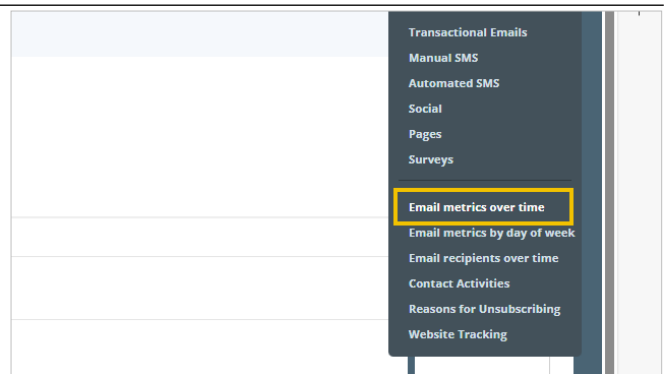


13.3.Email Metrics Over Time

The **Email Metrics Over Time Report** allows you to compare email metrics over an extended period of time. Results will be shown in the graph above with additional metrics shown in the chart below.



To find the report, hover over the Reports icon at the top-right corner of the page and scroll down and select **Email metrics over time**.

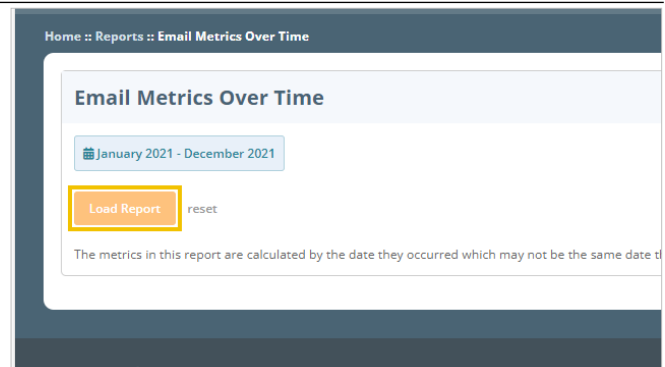


Use the calendar menu to select the date range to run your report.

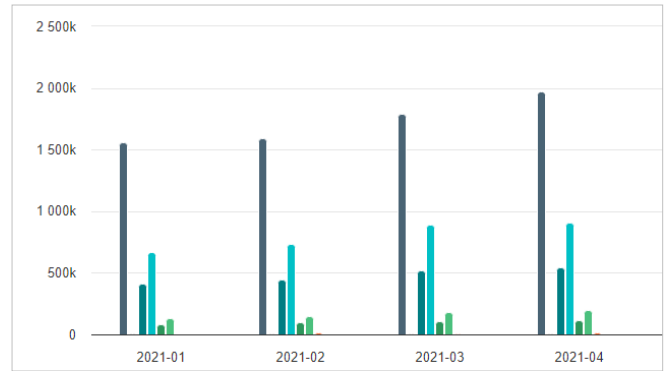


Click **Load Report** to generate your report.

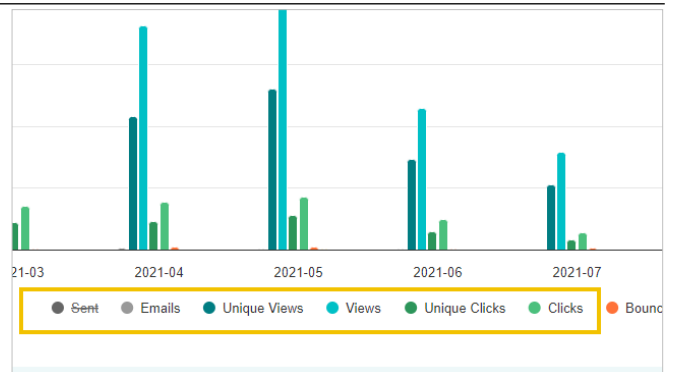
NOTE: Based on the amount of data, it could take a few minutes for your report to be generated.



Month by month, your results will appear on the bar graph with the same information also available in the charting below.

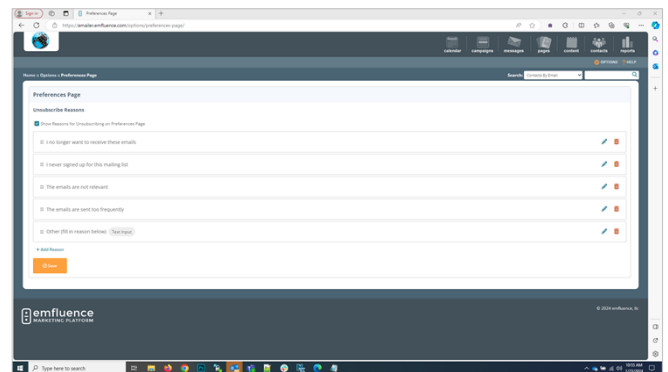


You can remove any metric from your graph, which will redraw it for you, by clicking on any of the filters below such as Sent, Unique Views, Complaints, etc. Clicking a second time will add them back to the graph.



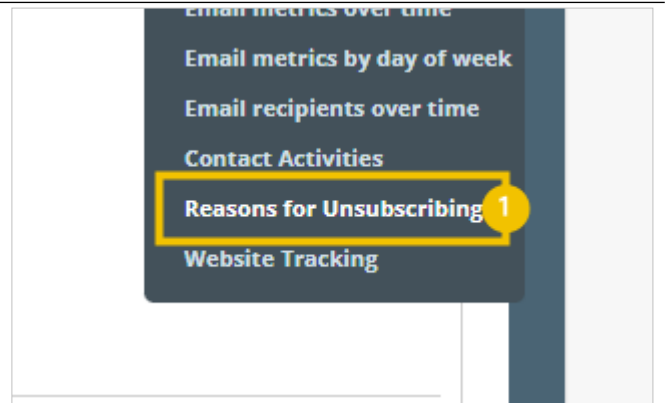
13.4.Reason for Unsubscribing

If your Unsubscribe Reasons have been activated in the Preference Page menu, you can record a contact's reason for unsubscribing.



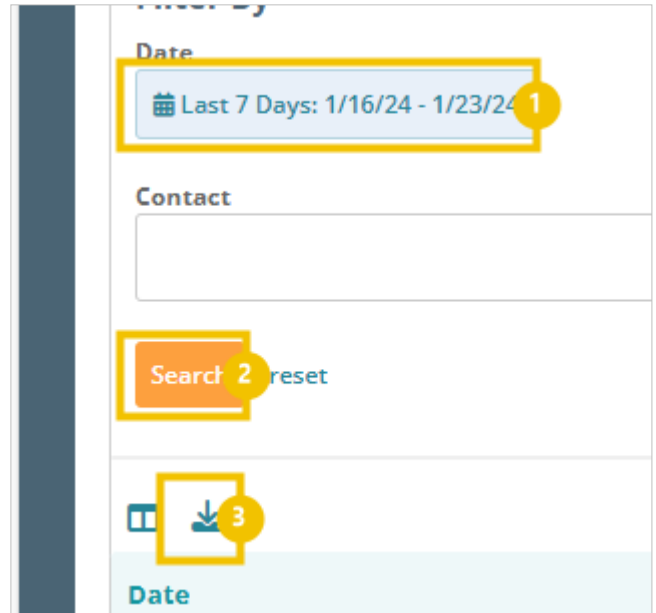
Hover over the Reports icon in the top right of the page and scroll down to click Reasons for Unsubscribing.

1. **Reasons for Unsubscribing:** Click to advance to the Reasons for Unsubscribing report.



Unsubscribes within the date range shown will be listed at the bottom of the page along with the date of their unsubscribe, the reason chosen, and a link to the email where the unsubscribe occurred.

1. **Date Range:** Choose the date range and optionally apply any filters to your search.
2. **Search:** Click to pull back results.
3. **Download:** Click to export results.

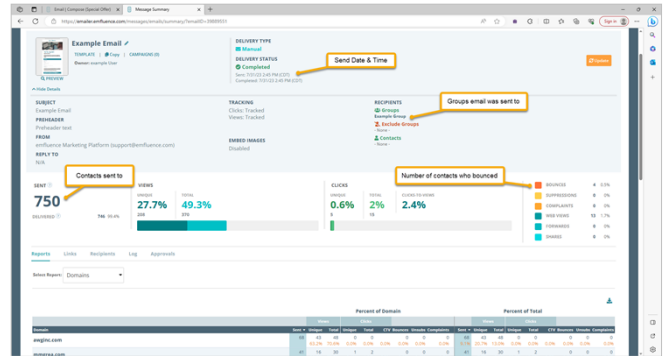


13.5. Email Reporting

13.5.1. Email Metrics

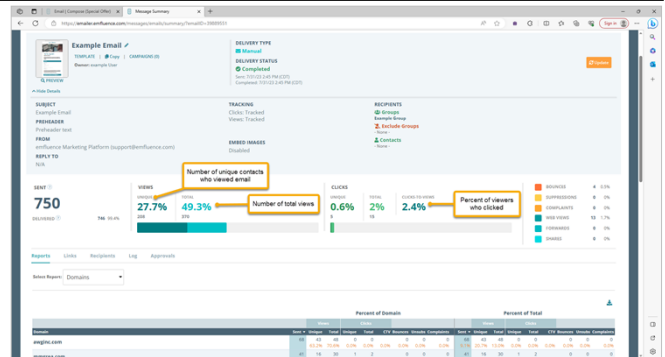
Several email metrics can be viewed on individual email reporting. At the top in the Summary section, you can find the date and time the email was sent, the owner of the email, and the groups the email was sent to.

Underneath the expanded summary, you will find the number sent to and the numbered delivered (sent minus any bounces). Bounces can be found as well.



Viewed and click metrics will be shown, both unique and total. Unique views are the number of different contacts who viewed your email while total describes the number of total views (for example, if I viewed your email 3 times I would count once as unique but three times for total).

Click-to-View represents of the percentage that viewed your email, how many of those contacts then clicked.



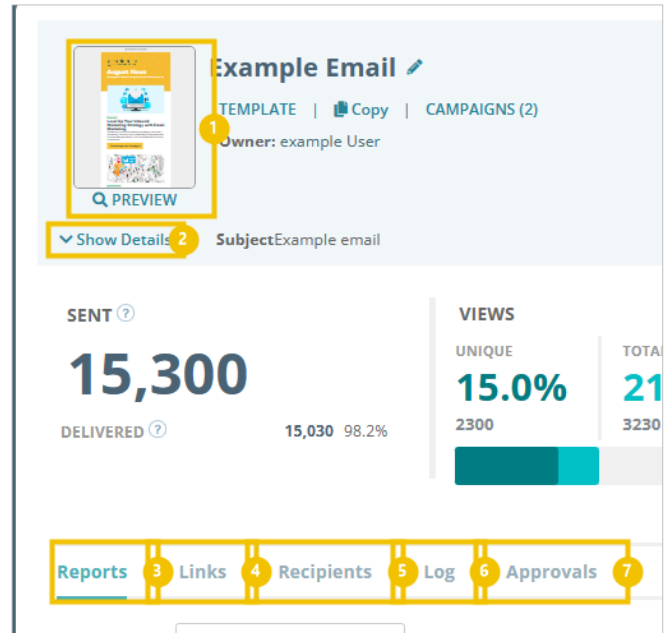
Along with bouncing, you should also keep an eye on both your suppressions (those that unsubscribe from your email) and complaints (those who mark your messages as spam).

High bouncing, suppression, or complaint rates can lead to deliverability problems. Clicking on any of those buttons will run a report under the Recipients tab and give you a list of contacts matching that search.

13.5.2. Manual Email Reporting

Several pieces of information can be found on the summary page of a sent email.

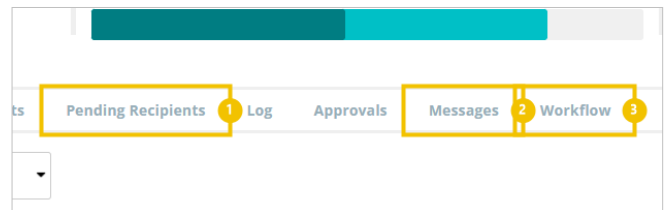
1. **PREVIEW:** Click to see a preview of the email which was sent.
2. **Show Details:** Expand the top of the summary page to provide more information about the email, the groups it was sent to, etc.
3. **Reports:** Domains will offer a breakdown of your reporting metrics for the top domains in your email. Groups will break down reporting at the group level. Devices will break down reporting by desktop and mobile devices. Contact Fields allows you to report by specific fields. Bounces will provide more information on the breakdown of your bounces. Views over time and Views will both show a breakdown of views across the email send.
4. **Links:** Link reporting will show reporting for all links in your email, who clicked what URLs, and when.
5. **Recipients:** Recipients allows you to search through all contacts sent the email and filter on metrics such as who viewed, who clicked, who bounced, etc.
6. **Log:** The log provides a report of when the email was created, when it was edited, and when it was sent. If approval is turned on in this account, it will also show a record of when the email was approved.
7. **Approvals:** If approval is turned on in an account, it will show who approved the email for send.



13.5.3. Automated Email Reporting

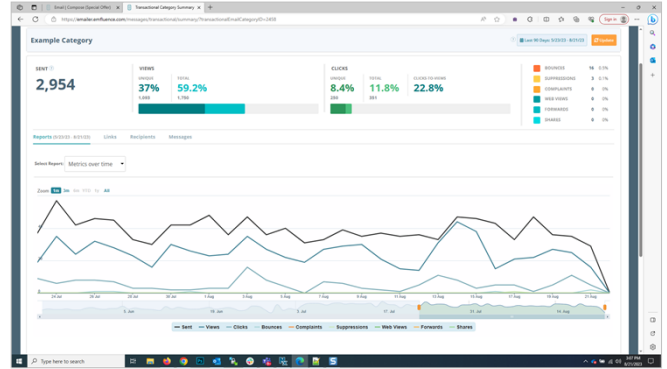
Automated Emails will have much the same reporting as manual emails with a few additional points of interest.

1. **Pending Recipients:** A list of contacts currently queued up to get the email can be found under the pending recipients tab.
2. **Messages:** For automated emails, all combined metrics will be shown on the main summary page. However, through the Messages menu, you can drill down to find metrics on specific sends.
3. **Workflow:** If the email is in a workflow, that workflow will be shown here.



13.5.4. Transactional Email Reporting

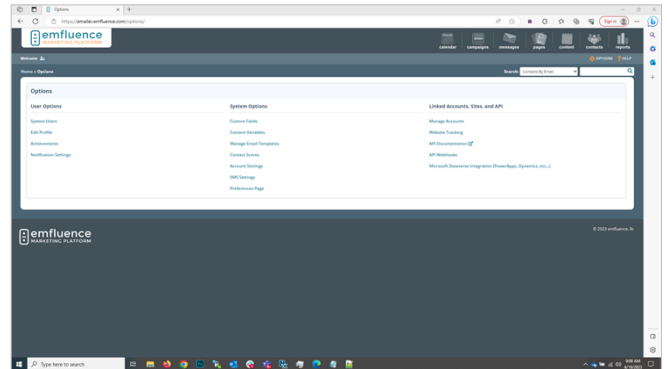
Reporting for emails sent over emfluences transactional endpoint can be found in the Transactional tab of the Messages section. Transactional emails are bundled into categories determined by the client allowing them to split up different types of transactional emails into separate reporting.



14. Options

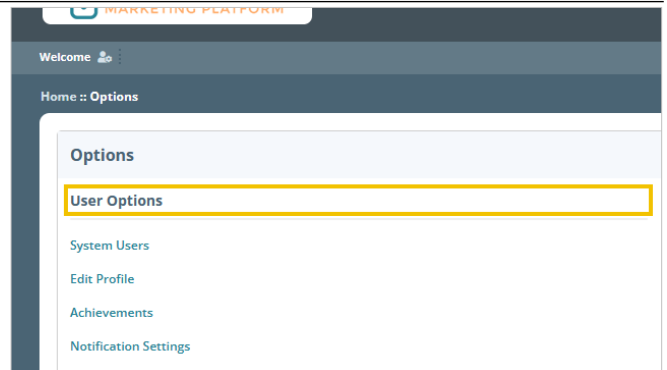
14.1. User Options

In the Options menu, you will find User and System Options where settings can be changed. You will also find Linked Accounts (such as Twitter and Instagram), Website Tracking, information on the emfluence API, and the link to set up your Microsoft Dataverse Integration.



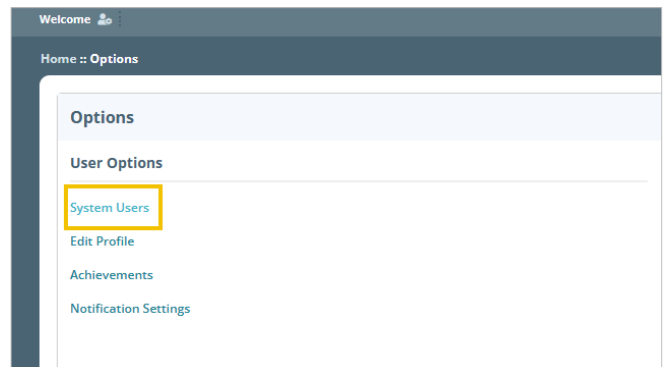
Under **User Options** you will find options to edit, add, or delete System Users, edit your own user's profile, examine your achievements within the platform, and change your notification settings.

NOTE: Some menus will require client admin level access.



14.1.1. System Users

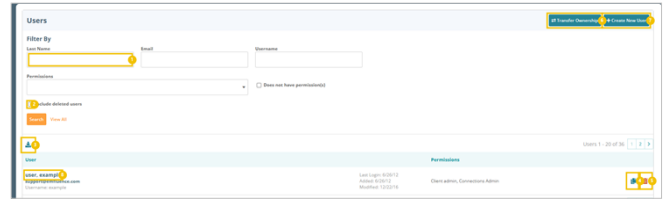
Client admins can access a list of users under **System Users**



emfluence Help Section

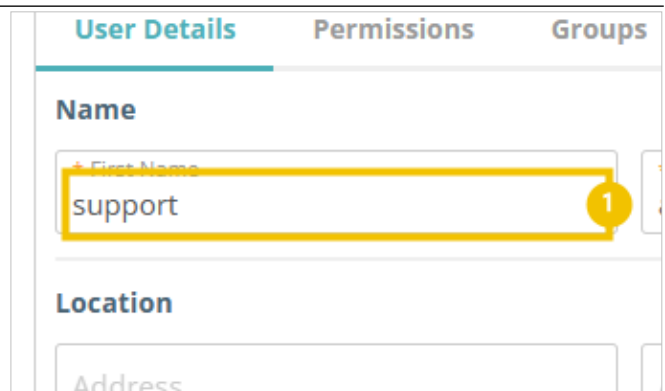
In System Users, client admins can search for, find, edit, create, or delete users in your account.

1. **Filters:** Use the menus to search and filter by name, email, username, or permissions.
2. **Include deleted users:** To include deleted users within your search, check to include those users.
3. **Download:** You can download a list of users.
4. **Copy User:** You can use the copy button to copy that user's permissions and create a new user with those same permissions.
5. **Delete User:** Use this option to delete a user. This action cannot be undone.
6. **Transfer Ownership:** You can use this button to transfer ownership of emails, groups, etc. from one user to another.
7. **Create New User:** You can use this button to create a new user.
8. **Edit User:** You can edit a user by clicking on their name.



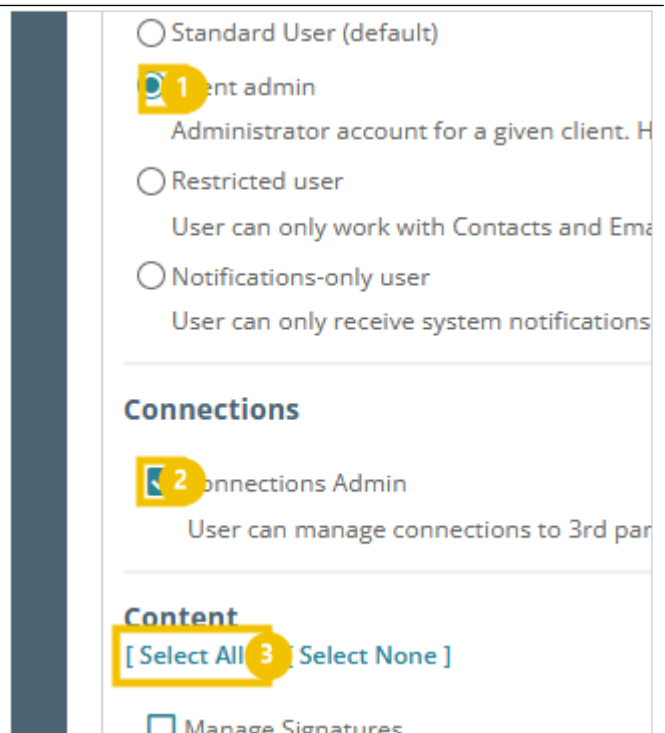
Under User Details you can edit information on the user's record. At the bottom of the page, the user can also edit their security settings such as altering their username or email, turning on/off two-factor authentication and trusted devices, and creating API access tokens. These security options are only available to that user, client admins cannot access them.

1. **Edit user information:** You can edit any user information such as name, location, contact information, etc., by clicking into the fields and typing or pasting the new text. Don't forget to save.



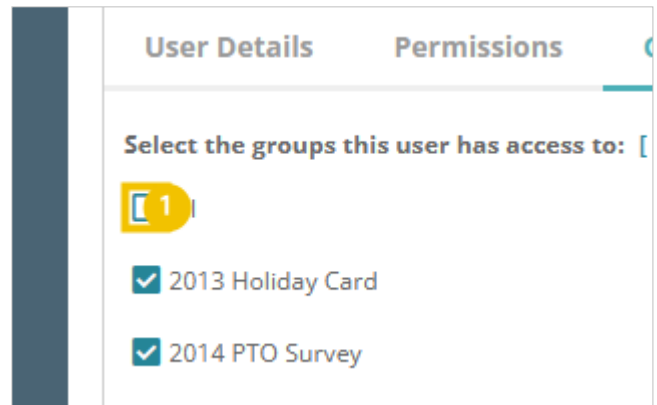
Under Permissions, you can edit the permissions of what the user has access to within the emfluence Marketing Platform.

1. **Change Role:** Change the role for that user within the emfluence platform.
2. **Individual Permissions:** Check the boxes for individual permissions you wish the user to have.
3. **Select All / Select None:** In the individual areas of the platform you can add or remove an entire subset of permissions by using the Select All and Select None permissions.



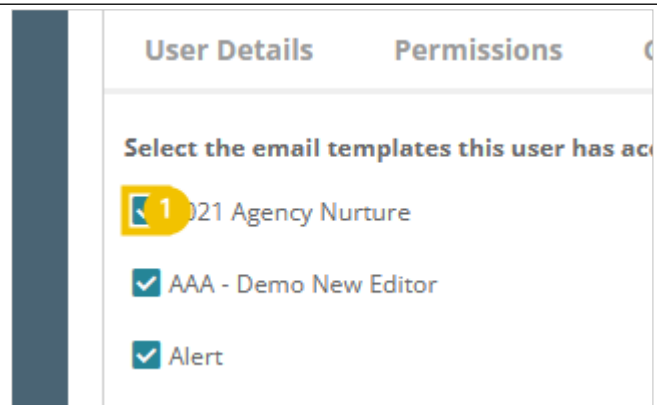
Under Groups, edit the Groups the user can see and access.

1. **Edit Access:** Use the individual checkboxes, or the Select All / Select None to control access to which groups the user can see. NOTE: Client Admins see all groups by default.

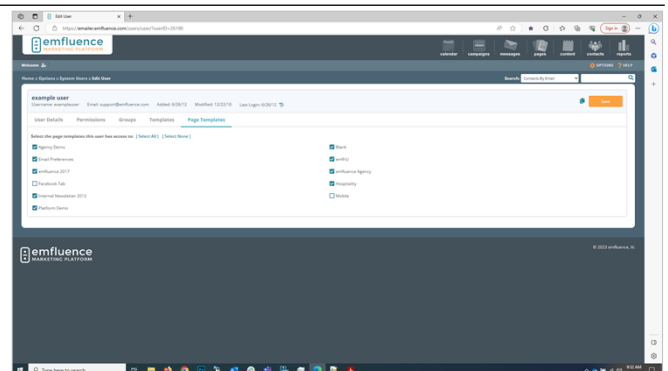


Under Templates, control which Email Templates the user has access to within the account.

1. **Add / Remove Access:** Check the box or use the Select All and Select None to add or remove email templates for that user.

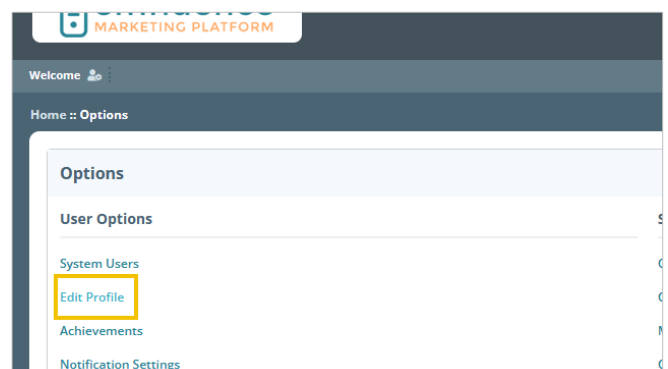


If your account includes any Page Templates, you can add access to them here. NOTE: Most newer accounts do not have page templates and use page themes instead.



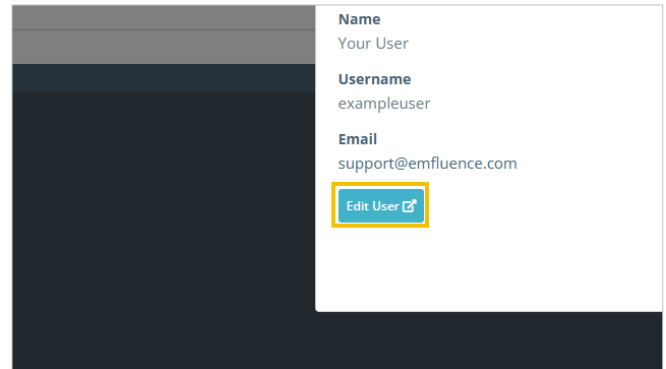
14.1.2. Edit Profile

You can edit your own profile by clicking on **Edit Profile** in the Options menu or clicking on the gear icon near the top left of the page.

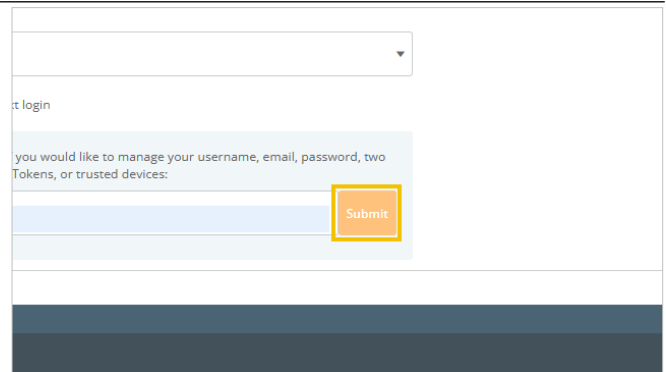


emfluence Help Section

In the pop-up, click on the link **Edit User**



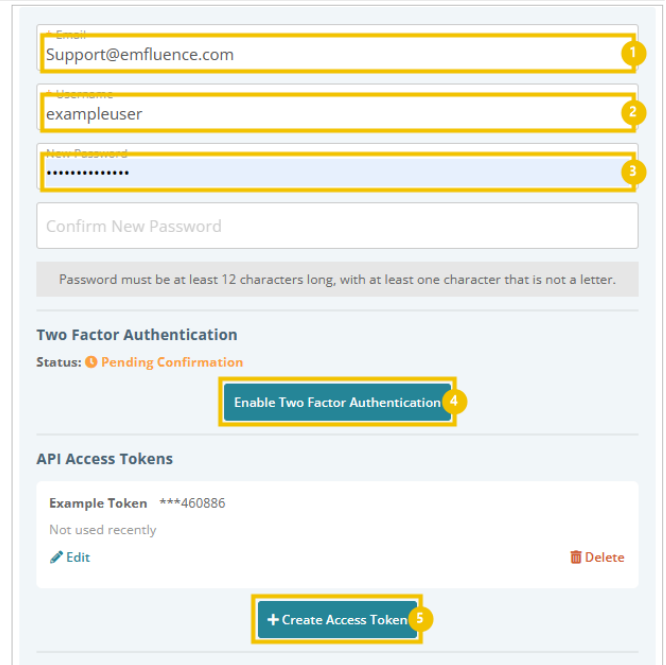
As when a Client Admin edits a user, you will see the user fields at the top of the page that can be edited. If you are also an admin, you will see and have access to Permissions, Templates, etc.



At the bottom of the page you will find the Security section which only you can edit. Confirm your password and click Submit to unlock the security section.

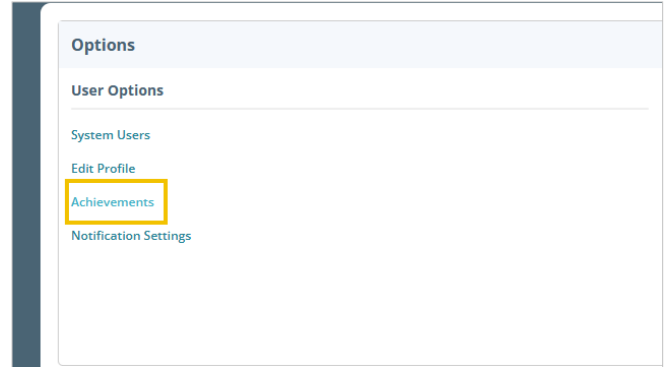
After unlocking the Security section you can edit your email, password, and username, turn on two-factor authentication, create access tokens, and see your trusted devices.

1. **Edit Email:** You can change the email associated with your login.
2. **Edit Username:** You can change the username associated with your login.
3. **Edit Password:** You can change the password associated with your login.
4. **Enable Two Factor Authentication:** You can enable two-factor authentication which will prompt you to confirm an email on every future log-in attempt. Underneath, you will also see a list of trusted devices and the last login for each one.
5. **Create Access Token:** You can create API access tokens to make calls to your account. The permissions of the tokens reflect those of the owner.



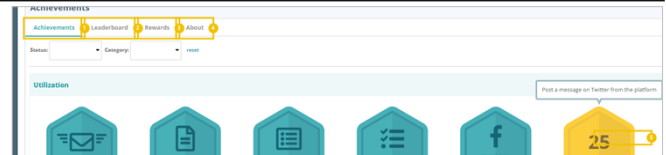
14.1.3. Achievements

To access, click on the link **Achievements**



Achievements are awarded for actions taken in the platform by users. Some are awarded automatically, others need to be requested

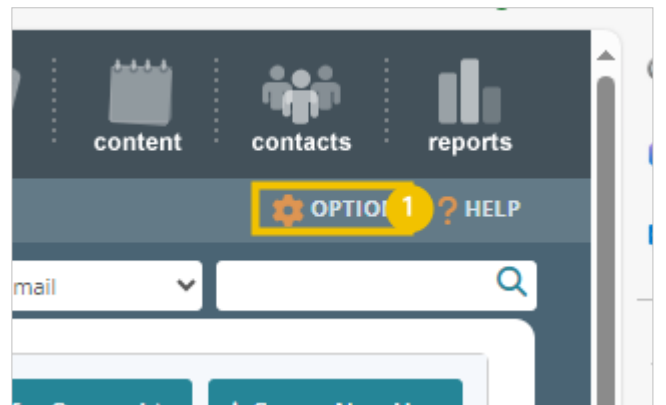
1. **Achievements:** See list of earned and available achievements.
2. **Leaderboard:** See the current leaderboard of achievements for emfluence users.
3. **Rewards:** Check out reward levels available when accumulating points on completed rewards.
4. **About:** Learn more about rewards.
5. **Point Value:** When hovering over a completed reward, the icon will flip showing the accumulated points.



14.2. Create a User

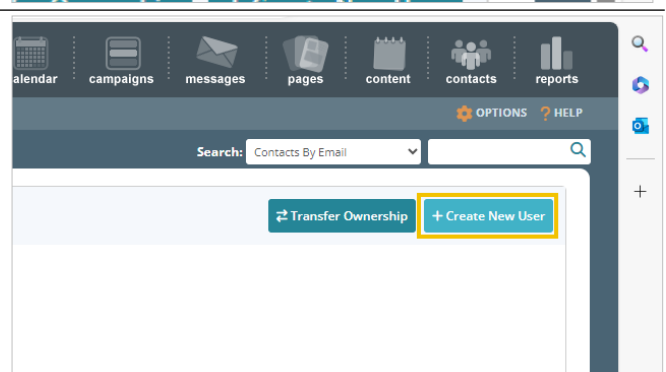
Client Admins can create new users and edit user permissions within the Options menu under System Users.

1. **OPTIONS:** To create new users, go to the Options menu and click on System Users.



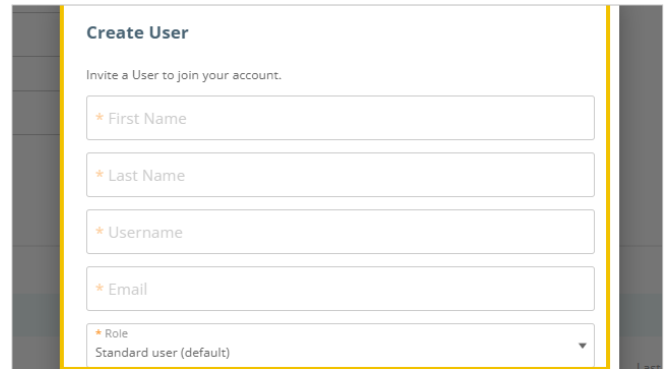
To create a new user, click on **Create New User** in the top right of the screen.

NOTE: You can also use the copy button available on any existing users to copy that user's permissions and then type in the new user information.



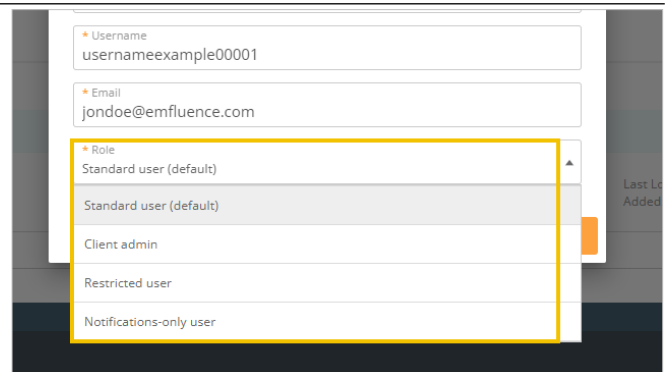
emfluence Help Section

Fill out the required fields in the **Create User** modal. While multiple users can share the same email, usernames must be distinct across all emfluence platform accounts.

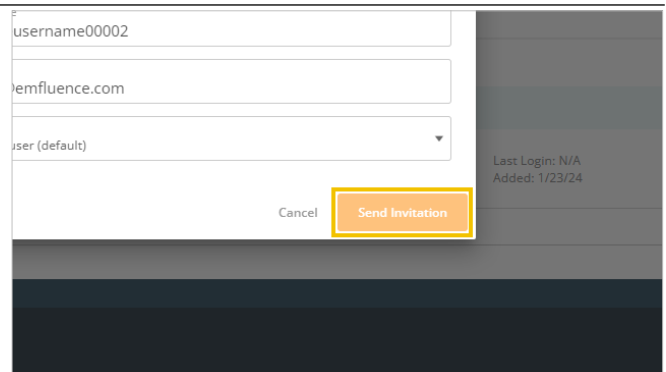


Choose the starting role for the new user.

- **Client Admins** have access to all permissions, groups, templates, etc. by default.
- **Standard Users** have access to all contacts but need to be assigned specific groups, templates, etc.
- **Restricted Users** only have access to the contacts they upload or contacts shared with them. This is a sales or franchise model to silo contacts between different users.
- **Notifications-Only Users** will still receive an invite to the platform, but their only access will be to change the types of notification emails they receive.

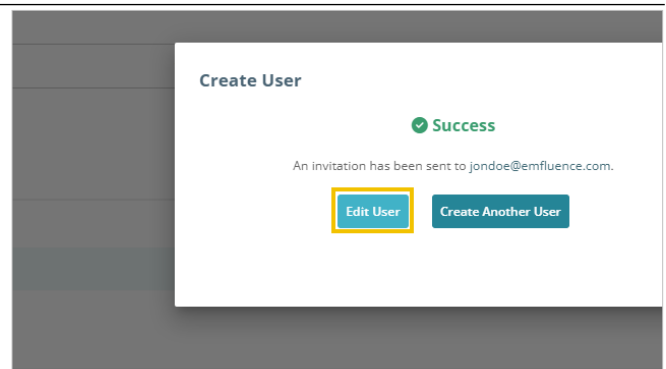


Next, click **Send Invitation** to create the user and trigger an email to the new user to set up their password. The invite will last about a day. If the invite expires, you can trigger another one by clicking the Invite icon next to their user in the list view.

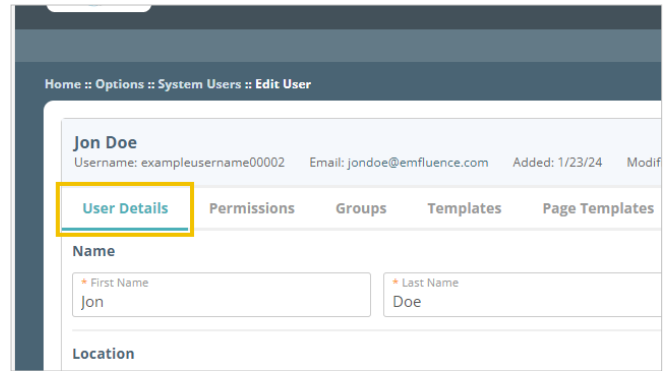


Next, you have the choice to close the modal, edit the user you have created, or create another user. If you choose to exit or create another user don't forget to return to this user to edit its permissions at some point.

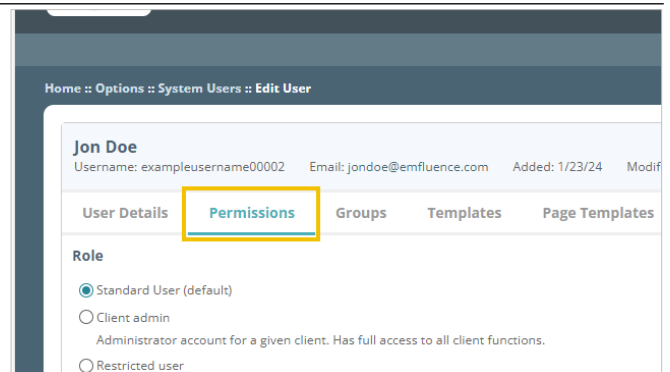
To edit permissions, click **Edit User**.



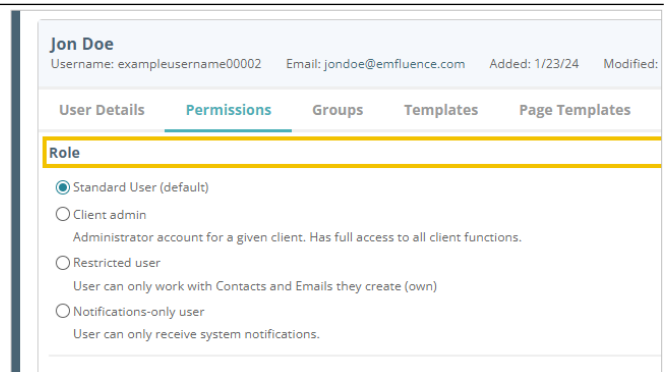
Here, you can edit the user through a series of tabs at the top of the screen. Under **User Details** you can update any personal information about the user. Each user will have access to their own User Details page as well.



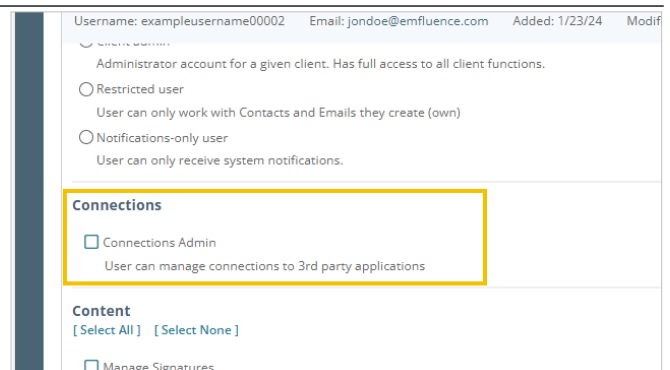
Under **Permissions** you can assign specific permissions to the user. By default, Client Admins get all permissions listed, but you can still check the boxes for individual permissions if you wish.



Under **Role** you can change the base permission of the user. NOTE: If you downgrade a client admin to a smaller role, their permissions will be drastically reduced as while they received access to groups, templates, etc. automatically when they were created they weren't explicitly given access to those parts of the platform which could be removed if you alter their role within the platform.



The **Connections Admin** under the **Connections** permissions gives the users access to pieces of the platform such as the Microsoft Dataverse and Zapier integration menus.



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The **Content** permissions give access to specific sections of the platform under the Content menu. These include Content Blocks & Signatures, the ability to upload images and see images in the Upload Files menu, and manage QR Codes.

Connections Admin
User can manage connections to 3rd party applications

Content
[Select All] [Select None]

- Manage Signatures
User can manage their signatures
- Upload Images
User can upload images
- Content Blocks
User can manage content blocks
- Manage QR Codes
User can manage QR codes

Email Management
[Select All] [Select None]

Under **Email Management** you can choose what permissions tied to email a user will receive including the ability to compose and send email, email approval, and access to pre-flight, template builder, and the paste-in-code option to create an email without a template.

*NOTE: If you check the box for **Approve Email** this user must approve **ALL EMAILS** in this account moving forward.*

Email Management
[Select All] [Select None]

- Send Mail
User can send emails.
- Compose Mail
User can compose emails.
- Approve Mail
User must approve emails.
- Pre-Flight
User can send Pre-Flight message tests
- Manage Templates
User can create and manage templates
- Email Coder
User can create emails without using a template

Under **Group Management** you can control what permissions the user has in relation to contacts and groups including creating groups, deleting groups, adding contacts, editing contacts, importing lists, exporting lists, and access to the list cleanse feature.

Group Management
[Select All] [Select None]

- Create Groups
User can create contact groups.
- Contacts (Delete)
User can delete contact records
- Contacts (Add)
User can add contact records
- Contacts (Edit)
User can edit contact records
- Contacts (Import)
User can import contact groups
- Contacts (Export)
User can export contact groups
- List Cleanse

Users given the **Manage Landing Pages** permission under **Pages** will have permissions to create and edit landing pages.

NOTE: If the user is not a client admin, and they need access to pages they did not create, access to those pages must be given to them individually.

- User can edit contact records
- Contacts (Import)
User can import contact groups
- Contacts (Export)
User can export contact groups
- List Cleanse
User can run list cleanses on contacts and view the results

Pages

- Manage Landing Pages
User can create and manage landing pages

SMS
[Select All] [Select None]

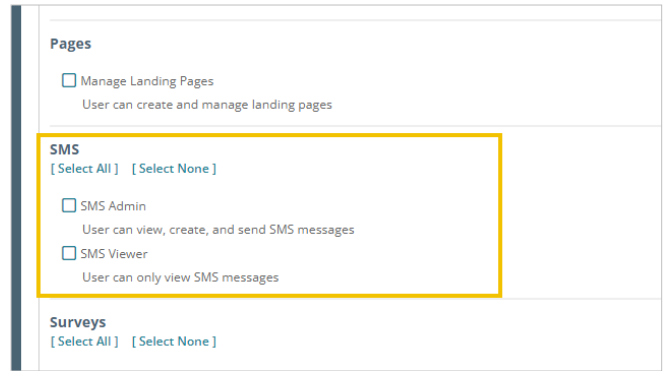
- SMS Admin

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Under **SMS** two permissions are available.

- **SMS Admins** have the ability to create and send SMS messages.
- **SMS Viewers** have access to see SMS messages for reporting purposes but can not create new messages.

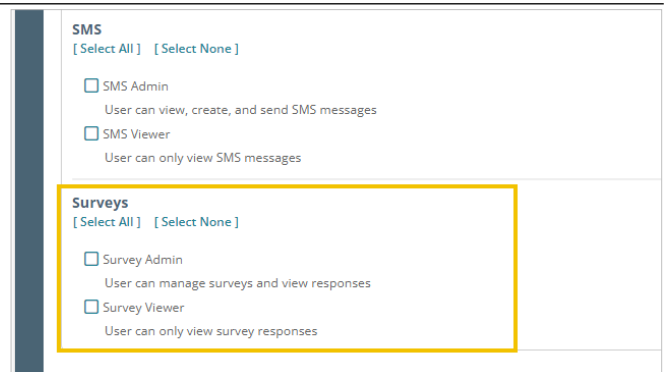
NOTE: SMS must be enabled in your account for these permissions to apply.



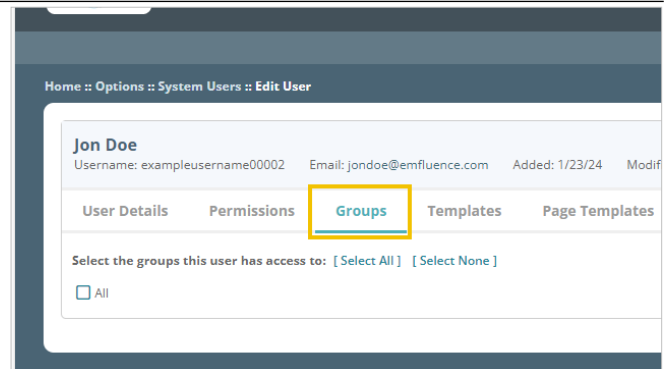
Under **Surveys** there are two permissions available.

- **Survey Admins** can create and edit surveys
- **Survey Viewers** can see surveys for reporting purposes but can not create or edit a survey.

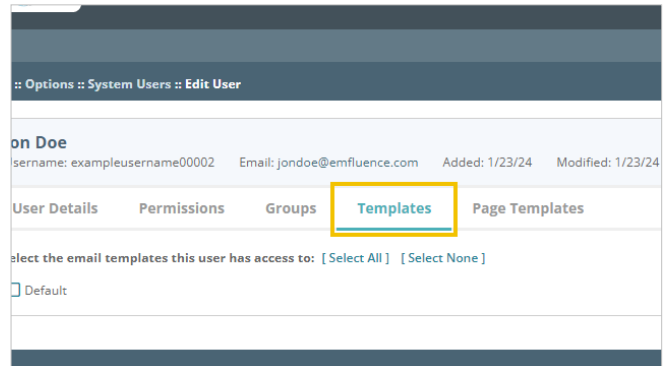
NOTE: As with landing pages, users who are not client admins will need to be given access to individual surveys for them to have access to those surveys.



Under the **Groups** tab you can assign a user's access to existing groups. Client Admins see all groups by default.

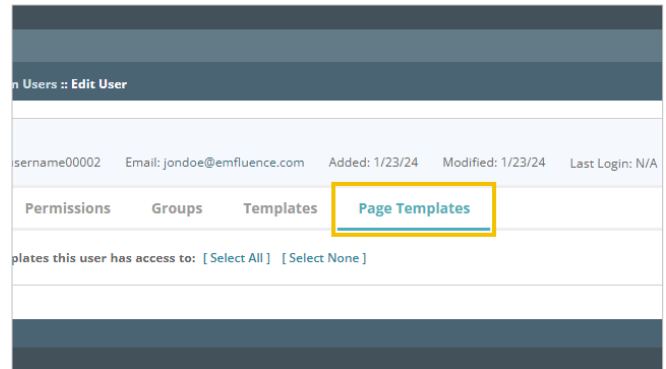


Under the **Templates** tab you can assign users specific templates. Users can only send emails using templates they have access to.



Under **Page Templates** you can assign any page templates to this user.

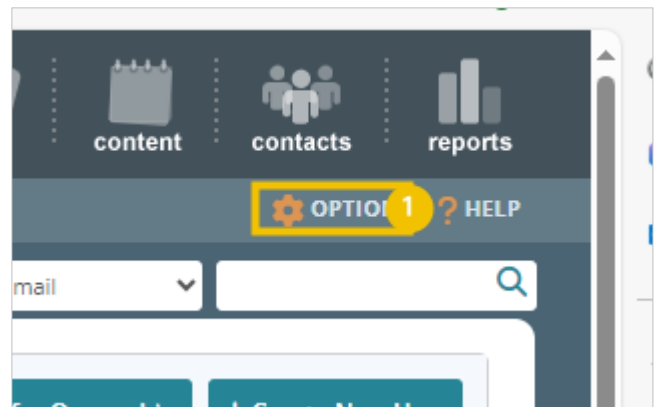
NOTE: As emfluence has moved to Page Themes rather than Page Templates, newer emfluence accounts are unlikely to see templates listed under this section.



14.3. User Permissions

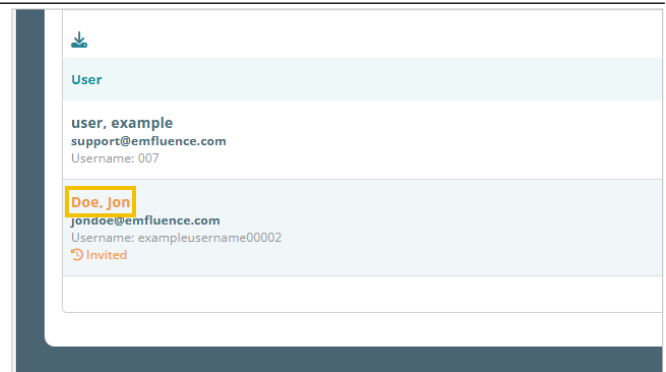
Client Admins have the ability to edit the permissions of users.

- OPTIONS:** To edit a user, click into the Options menu and click on System Users.

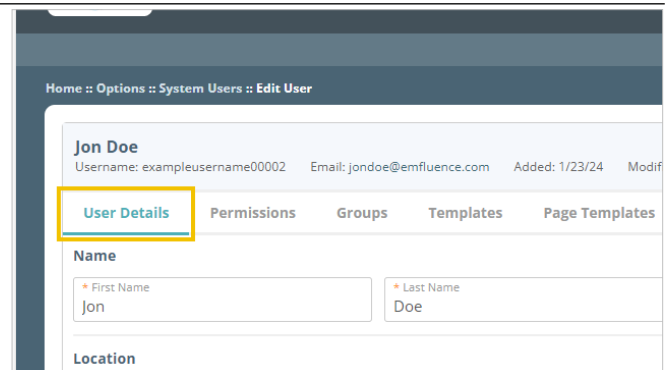


To edit an individual user, click on the user's name.

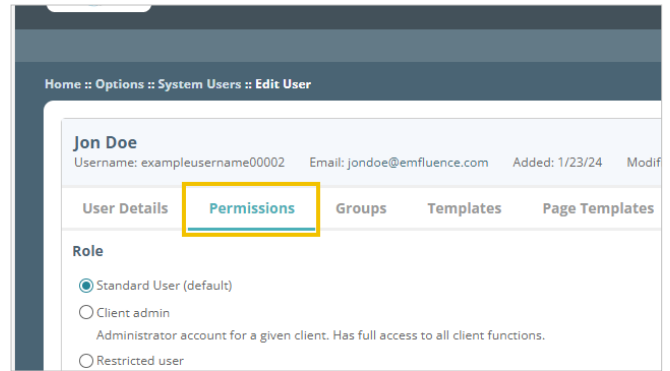
NOTE: Editing permissions can affect what the user owns within the platform. For example, if you remove the Send Email permission from a user any automated emails owned by that user would fail to send. Permission changes can also affect API Tokens tied to that user. Be careful when editing permissions for existing users.



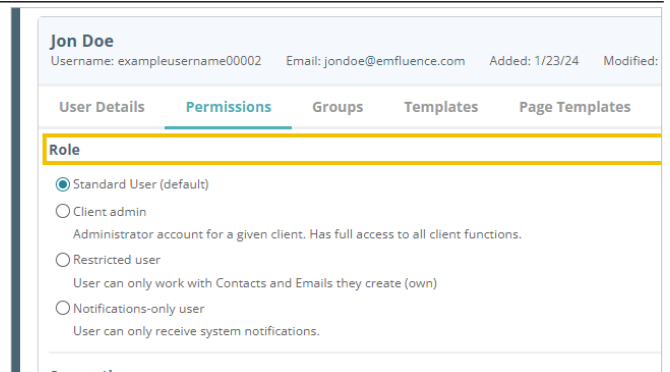
Here, you can edit the user through a series of tabs at the top of the screen. Under **User Details** you can update any personal information about the user. Each user will have access to their own User Details page as well.



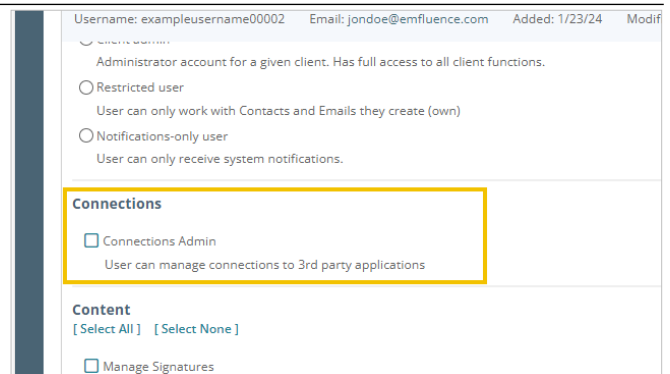
Under **Permissions** you can assign specific permissions to the user. By default, Client Admins get all permissions listed, but you can still check the boxes for individual permissions if you wish.



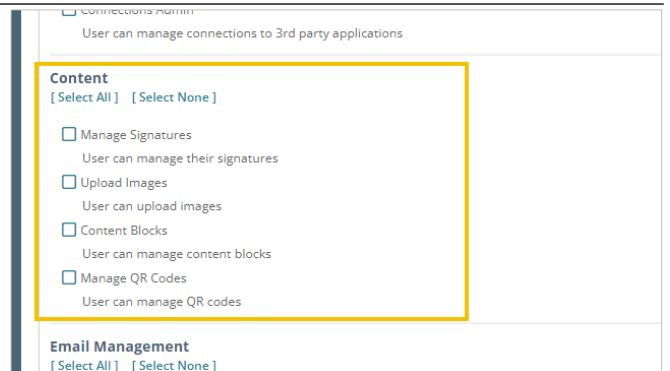
Under **Role** you can change the base permission of the user. NOTE: If you downgrade a client admin to a smaller role, their permissions will be drastically reduced as while they received access to groups, templates, etc. automatically when they were created they weren't explicitly given access to those parts of the platform which could be removed if you alter their role within the platform.



The **Connections Admin** under the **Connections** permissions gives the users access to pieces of the platform such as the Microsoft Dataverse and Zapier integration menus.



The **Content** permissions give access to specific sections of the platform under the Content menu. These include Content Blocks & Signatures, the ability to upload images and see images in the Upload Files menu, and manage QR Codes.



emfluence Help Section

Under **Email Management** you can choose what permissions tied to email a user will receive including the ability to compose and send email, email approval, and access to pre-flight, template builder, and the paste-in-code option to create an email without a template.

*NOTE: If you check the box for **Approve Email** this user must approve **ALL EMAILS** in this account moving forward.*

Email Management
[Select All] [Select None]

- Send Mail
User can send emails.
- Compose Mail
User can compose emails.
- Approve Mail
User must approve emails.
- Pre-Flight
User can send Pre-Flight message tests
- Manage Templates
User can create and manage templates
- Email Coder
User can create emails without using a template

Under **Group Management** you can control what permissions the user has in relation to contacts and groups including creating groups, deleting groups, adding contacts, editing contacts, importing lists, exporting lists, and access to the list cleanse feature.

Group Management
[Select All] [Select None]

- Create Groups
User can create contact groups.
- Contacts (Delete)
User can delete contact records
- Contacts (Add)
User can add contact records
- Contacts (Edit)
User can edit contact records
- Contacts (Import)
User can import contact groups
- Contacts (Export)
User can export contact groups
- List Cleanse

Users given the **Manage Landing Pages** permission under **Pages** will have permissions to create and edit landing pages.

NOTE: If the user is not a client admin, and they need access to pages they did not create, access to those pages must be given to them individually.

User can edit contact records

- Contacts (Import)
User can import contact groups
- Contacts (Export)
User can export contact groups
- List Cleanse
User can run list cleanses on contacts and view the results

Pages

- Manage Landing Pages
User can create and manage landing pages

SMS
[Select All] [Select None]

- SMS Admin

Under **SMS** two permissions are available.

- **SMS Admins** have the ability to create and send SMS messages.
- **SMS Viewers** have access to see SMS messages for reporting purposes but can not create new messages.

NOTE: SMS must be enabled in your account for these permissions to apply.

Pages

- Manage Landing Pages
User can create and manage landing pages

SMS
[Select All] [Select None]

- SMS Admin
User can view, create, and send SMS messages
- SMS Viewer
User can only view SMS messages

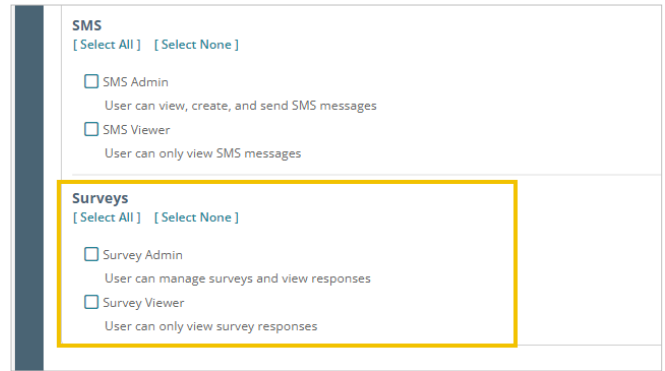
Surveys
[Select All] [Select None]

emfluence Help Section

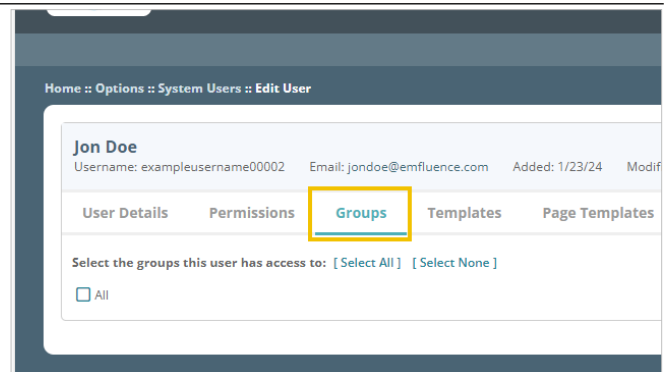
Under **Surveys** there are two permissions available.

- **Survey Admins** can create and edit surveys
- **Survey Viewers** can see surveys for reporting purposes but can not create or edit a survey.

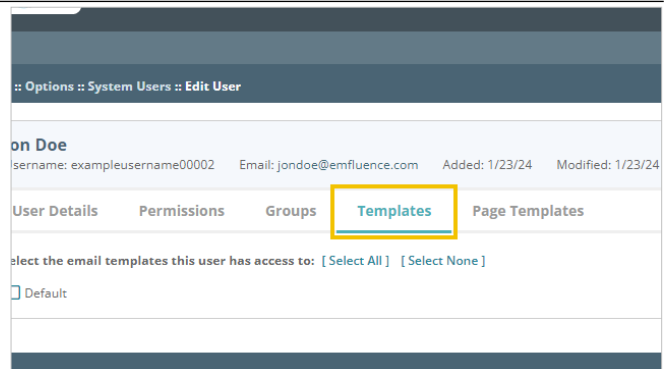
NOTE: As with landing pages, users who are not client admins will need to be given access to individual surveys for them to have access to those surveys.



Under the **Groups** tab you can assign a user's access to existing groups. Client Admins see all groups by default.

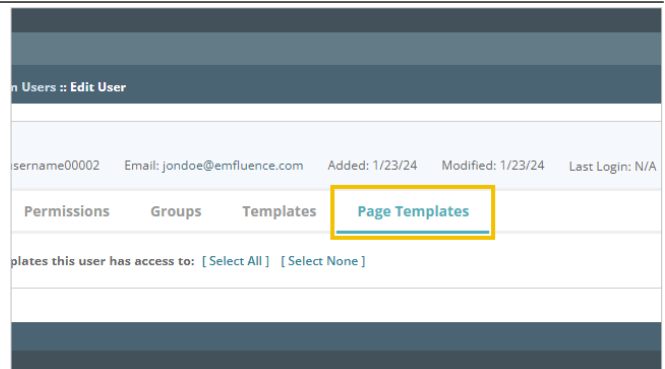


Under the **Templates** tab you can assign users specific templates. Users can only send emails using templates they have access to.



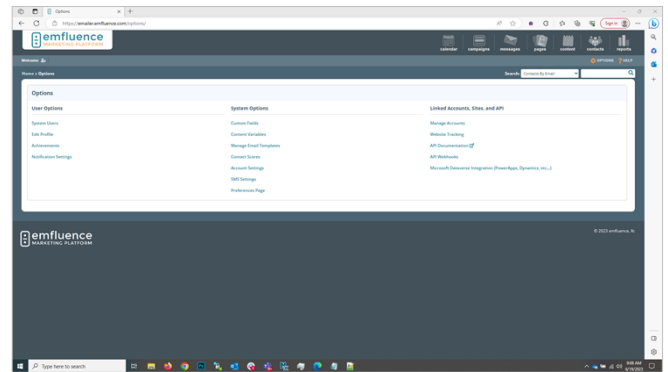
Under **Page Templates** you can assign any page templates to this user.

NOTE: As emfluence has moved to Page Themes rather than Page Templates, newer emfluence accounts are unlikely to see templates listed under this section.

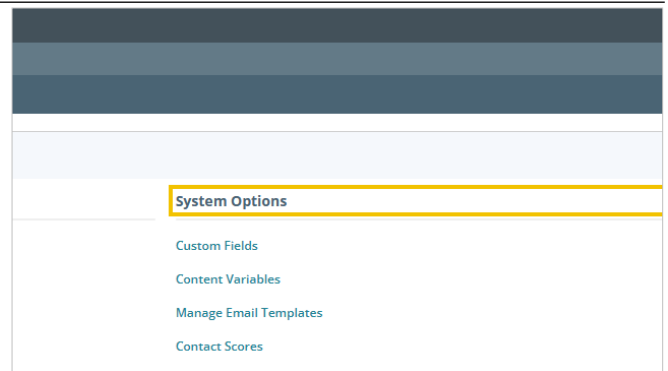


14.4. System Options

In the Options menu, you will find User and System Options where settings can be changed. You will also find Linked Accounts (such as Twitter and Instagram), Website Tracking, information on the emfluence API, and the link to set up your Microsoft Dataverse Integration.

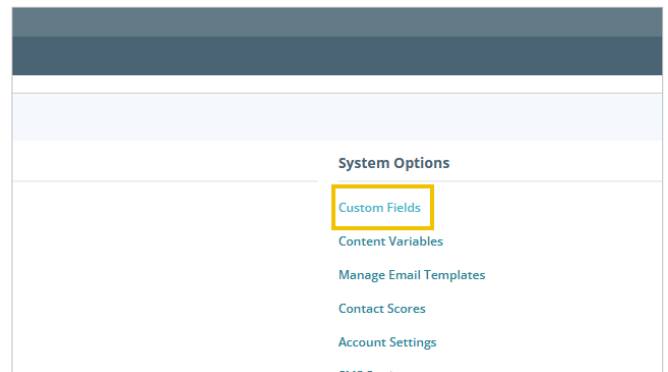


Under System Options, you can access Custom Fields, Content Variables, Email Templates, Contact Scores, Account Settings, SMS Settings, and the Preferences Page.



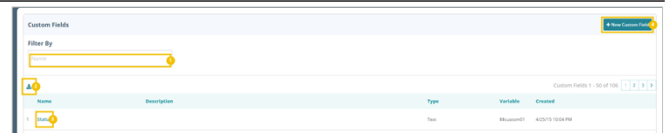
14.4.1. Custom Fields

To add or edit, click on the link **Custom Fields**



Custom Fields can be used for any datapoint not included in the standard fields on a contact record.

1. **Filter:** Filter your existing custom fields to find the specific field you are looking for.
2. **Download:** Download a list of your custom fields.
3. **Edit:** To edit an existing field, click on the name of the field.
4. **New Custom Field:** Create a new custom field.



Fill in the Name, the optional Description and then pick the Data Type of your new field. Save to add that field to your account.

NOTE: The data you map to that field on an import must match the data type you have selected.

14.4.2. Content Variables

You can use Content Variables to assign blocks of content to contacts.

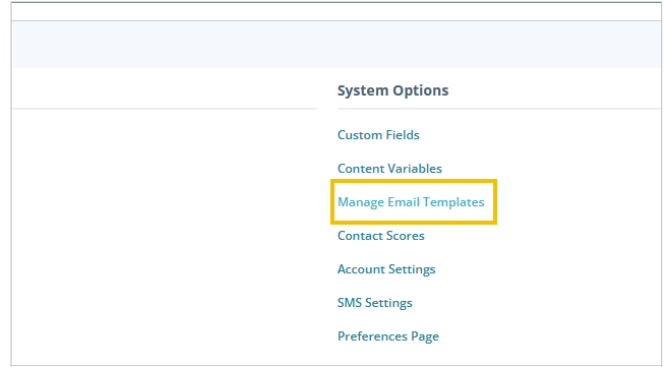
Ten Content Variables are available in your account. You can name them specifically for the variable you plan to use and then assign blocks on contacts to that field.

1. **Edit Name:** Edit the name of the content field and click Save.

Assign any existing Content Block within your account to that field for every contact. You can do this individually by editing the contact record, through bulk update, over an API call, or through an import.

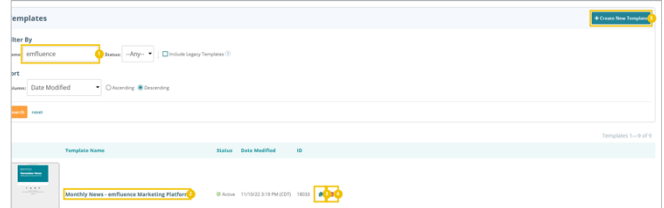
14.4.3. Manage Email Templates

Users with access to Template Builder can click on Manage Email Templates to see and edit any template they have access to.



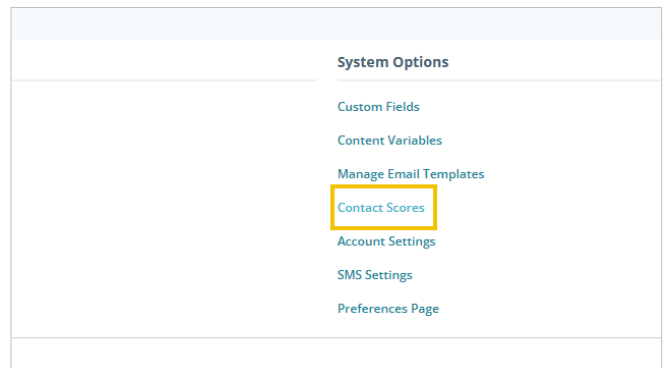
Template Builder provides users with access to see, edit, create, and delete templates.

- Search:** Search for templates by name, status, and include any legacy templates in your search (these templates are hidden because they cannot be edited within template builder).
- Template Name:** Click on the name of the template to see and edit the template.
- Copy:** Create a copy of the template.
- Delete:** Delete the template to permanently remove it from your account.
- Create New Template:** Create a new template starting with one of the example templates provided or code your own template.



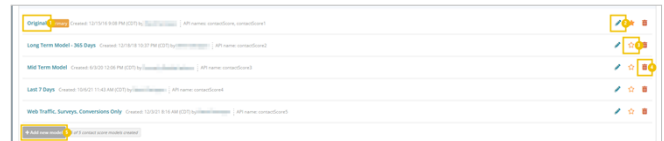
14.4.4. Contact Scores

Under Contact Scores, you can edit your settings on how contact activities are scored. You can save up to 5 different contact score models, one of which will be applied as your primary score.

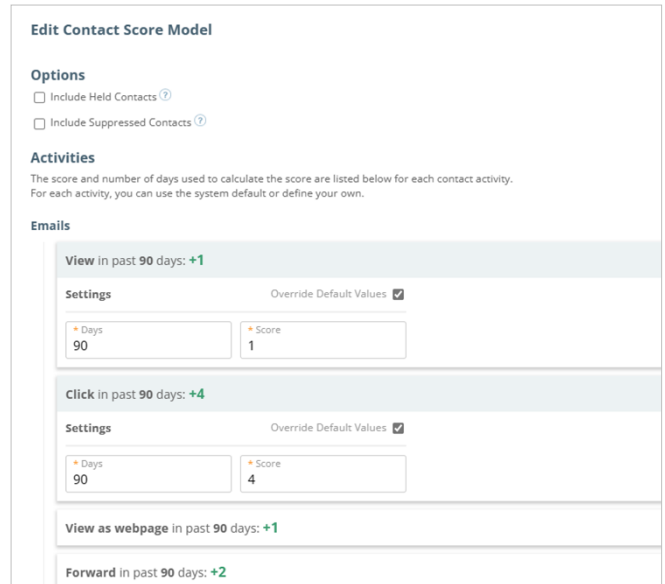


Contact Score Models

- Scoring Models:** Click on any existing scoring model to edit
- Edit:** Click to edit the scoring model.
- Primary:** Click to make that score the primary score in your account.
- Delete:** Click to remove a scoring model.
- Add new model:** Click to add additional scoring models.

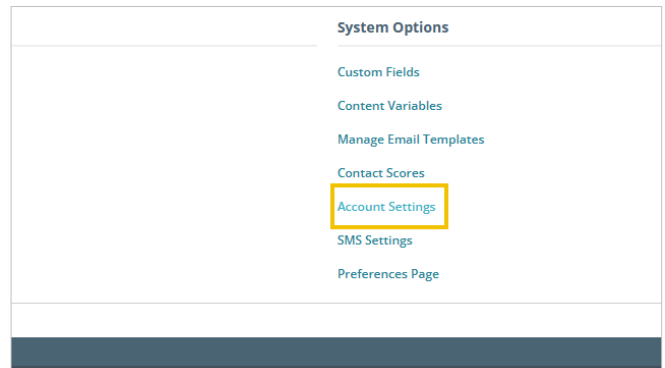


Expand and edit any values, remembering to save to see the contact score updated.



14.4.5. Account Settings

Account Settings includes basic information tied to your account including brand colors, social links, your CAN-SPAM Address, and your authenticated sending domains.



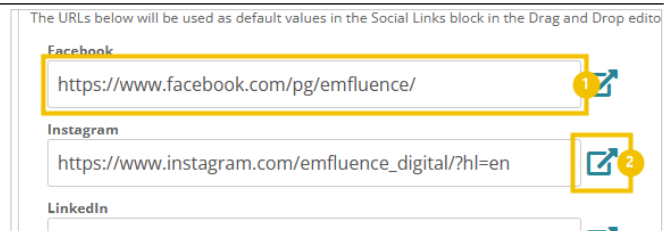
Brand Colors allows you to add any brand colors to your account which will be included wherever a color-picker is shown in emfluence.



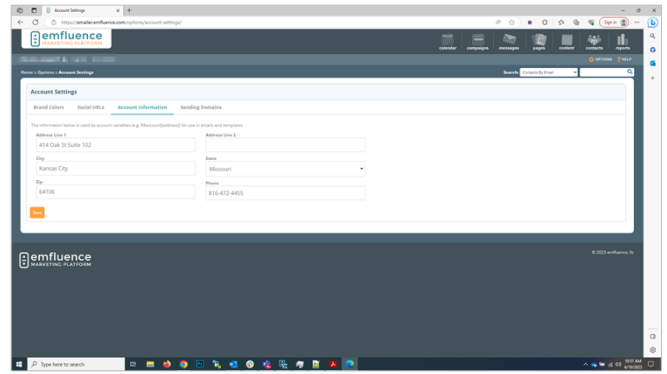
1. **Edit:** Edit an existing color by changing the hex code of the color.
2. **Delete:** Remove an existing color from your list of brand colors.
3. **Add Color:** Add a new brand color by typing or pasting the hex code value and saving.

Social URLs can be saved within your account. These URLs will be saved as the defaults when adding the social element to an email or landing page.

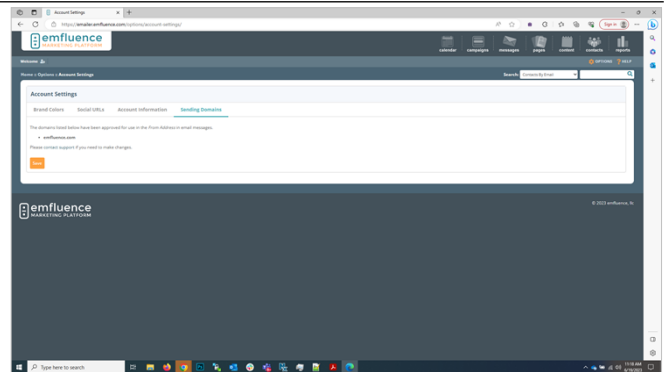
1. **URL:** Type or paste the URL
2. **View:** Launch the URL in a new tab to confirm you have the correct URL.



Account information is where your CAN-SPAM address is stored. Updates to these values will update any templates using the account variables.

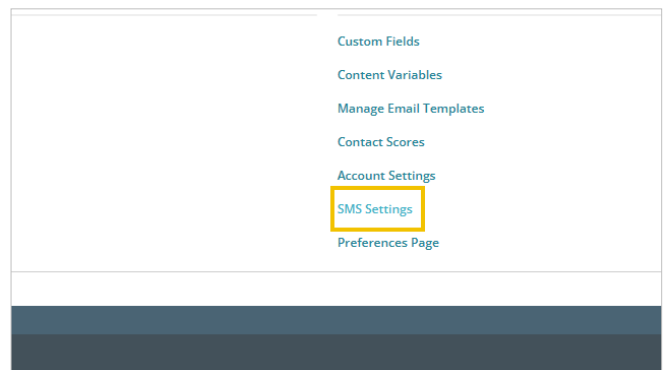


Sending Domains will show the available domains from which you can send email through the emfluence Marketing Platform. Domains should be authenticated prior to be added to an account.



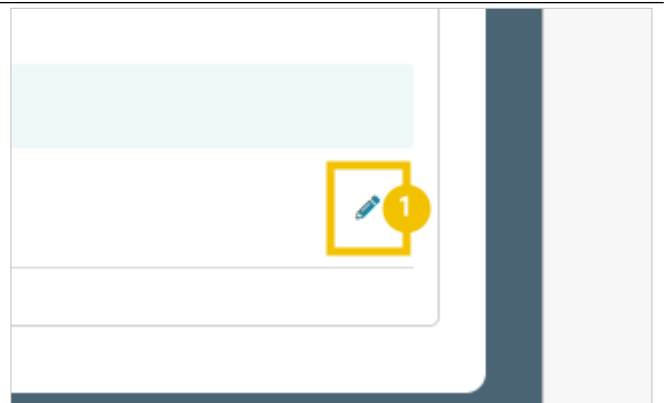
14.4.6. SMS Settings

SMS Settings allows you to share access to SMS with restricted users within your account.



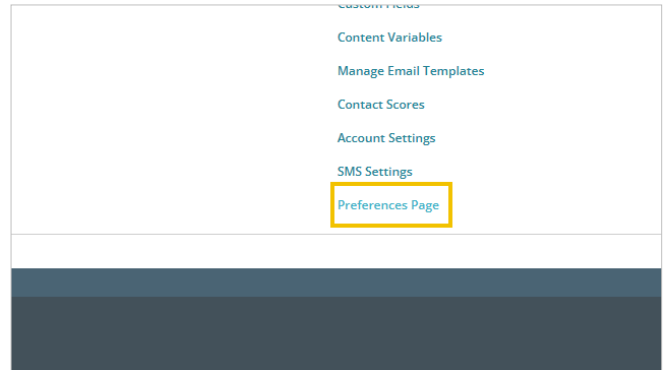
SMS Settings

1. **Edit:** Click to edit to add or remove restricted users to your SMS Messaging Service.



14.4.7. Preferences Page

You can turn on and set unsubscribe options by clicking on **Preference Page**



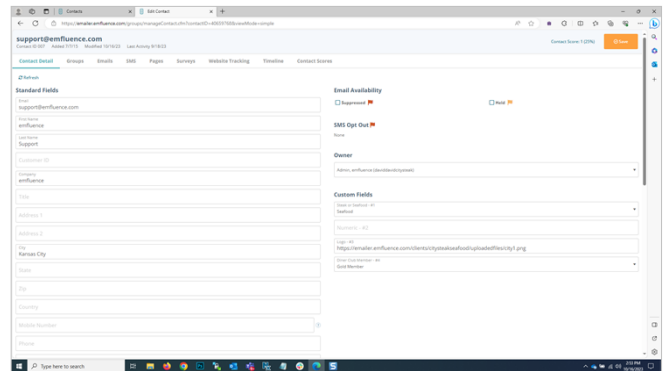
The Preferences Page will allow you to turn on and create, edit, and delete reasons for unsubscribing which your contacts will be shown.



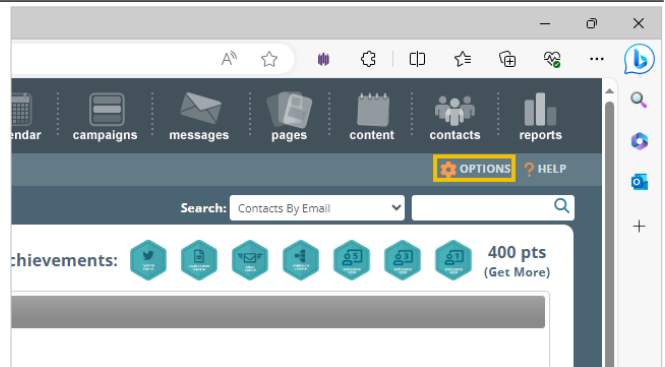
1. **Activate Unsubscribe Reasons:** Check the box to turn on and display the list of default unsubscribe reasons.
2. **Reorder:** Click and drag the reasons to display in the order you wish.
3. **Add Reason:** Add additional unsubscribe reasons to your list.
4. **Edit:** Edit an existing reason.
5. **Delete:** Remove an existing reason.
6. **Save:** Save all changes.

14.5. Custom Fields

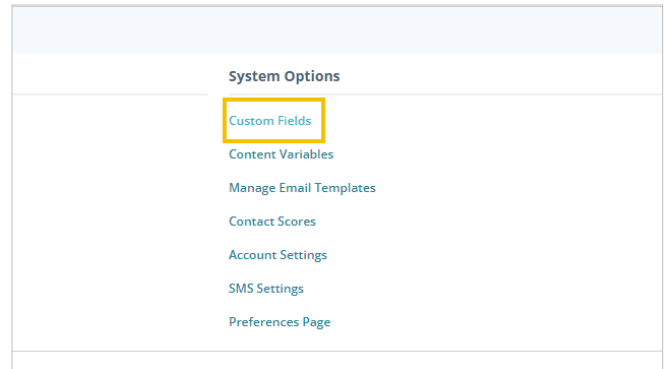
Contact data is saved on the contact record. Contact details, such as standard fields (emails, first name, last name, city, state, etc.) are premade in every account. For any data point you have that doesn't have a corresponding field, you can create a custom field. Once created, data can be saved on that field.



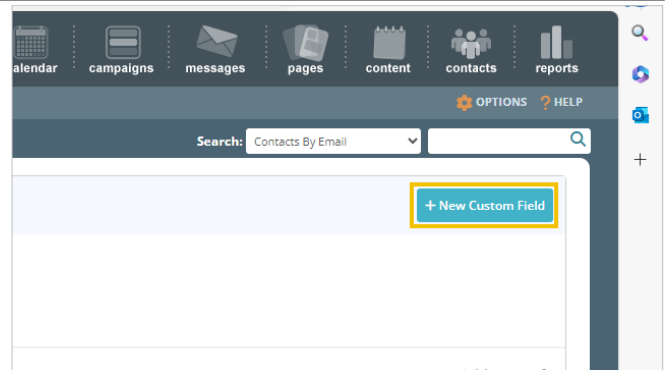
To edit existing custom fields and create new fields, click on **OPTIONS**.



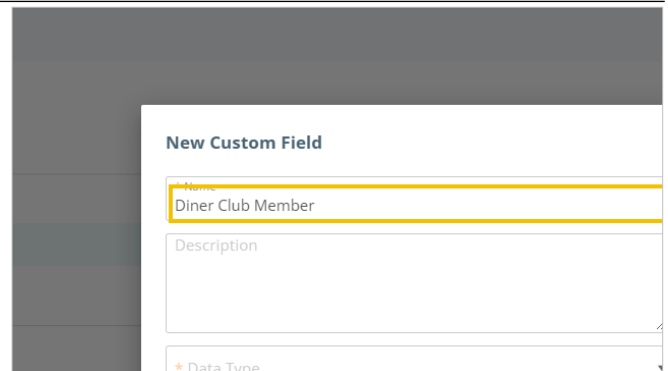
In the middle column, under **System Options**, find and click on **Custom Fields**.



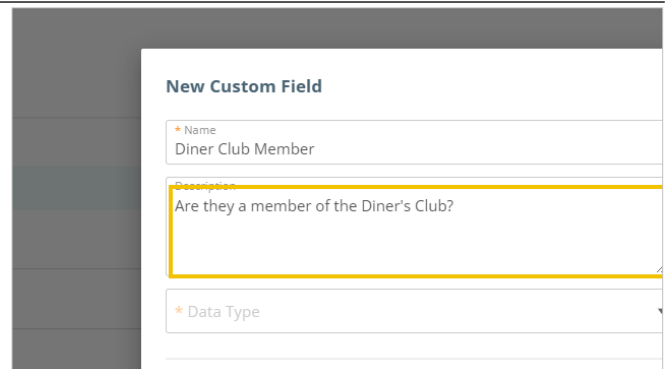
To create a new custom field, click on **New Custom Field**.



Give your new field a name. You will be able to edit the name of your field later if you wish.

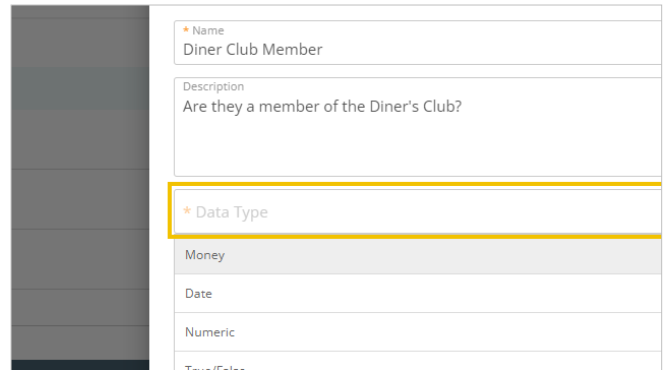


You can add a description for your field to provide more information about how you are using the field in emfluence to your team's other users. Descriptions are not required.



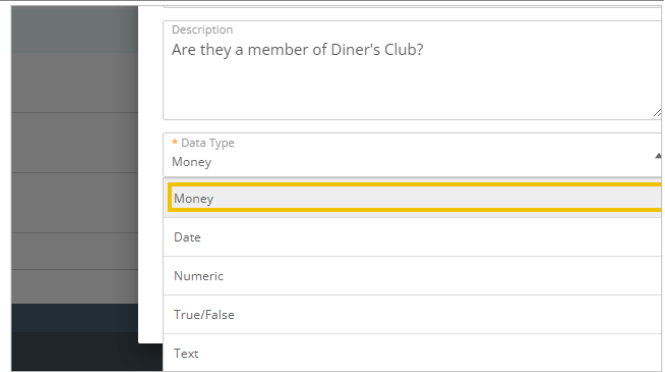
emfluence Help Section

Choose the **Data Type**. Data can be stored in several different types. While you do have the ability to change the data type at a later date, doing so will wipe all values saved for that field in emfluence so it is not recommended.



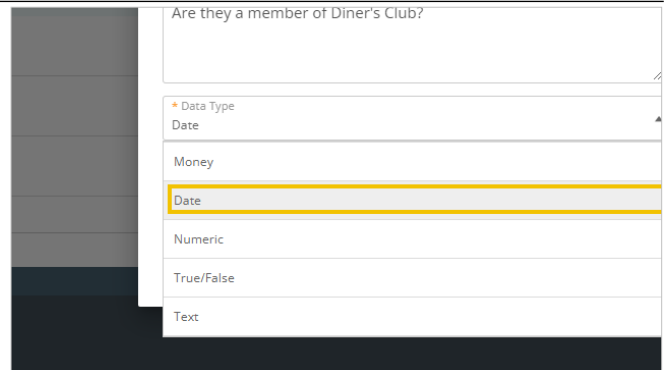
The screenshot shows a form configuration interface. At the top, there is a field labeled 'Name' with the value 'Diner Club Member'. Below it is a 'Description' field with the text 'Are they a member of the Diner's Club?'. A 'Data Type' dropdown menu is open, showing a list of options: Money, Date, Numeric, True/False, and Text. The 'Money' option is highlighted with a yellow border.

The **Money** field is a numeric field with a decimal place two places in. To allow for different type of currency, the field does not include a dollar sign, pound sign, etc. When using this field as a variable in an email, remember to add the appropriate monetary sign before the variable.



The screenshot shows a form configuration interface. At the top, there is a 'Description' field with the text 'Are they a member of Diner's Club?'. A 'Data Type' dropdown menu is open, showing a list of options: Money, Date, Numeric, True/False, and Text. The 'Money' option is highlighted with a yellow border.

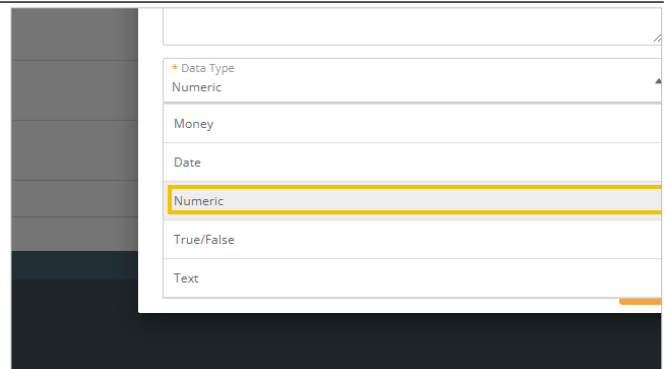
The **Date** field stores data in a standard MM/DD/YYYY format. It will also accept M/D/YYYY or YYYY/MM/DD values. A date field will not accept a time stamp along with the date. It is a date field only.



The screenshot shows a form configuration interface. At the top, there is a field with the text 'Are they a member of Diner's Club?'. A 'Data Type' dropdown menu is open, showing a list of options: Date, Money, Date, Numeric, True/False, and Text. The 'Date' option is highlighted with a yellow border.

The **Numeric** field will accept any numeric value up to 14 characters. When choosing a numeric field, you can choose to include a decimal.

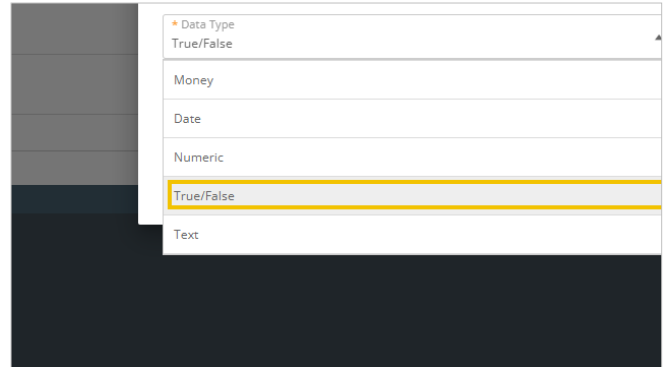
NOTE: If you are saving an alphanumeric ID or an ID that includes dashed values, you would want to save as a text field rather than a numeric field. A numeric field will only accept numbers.



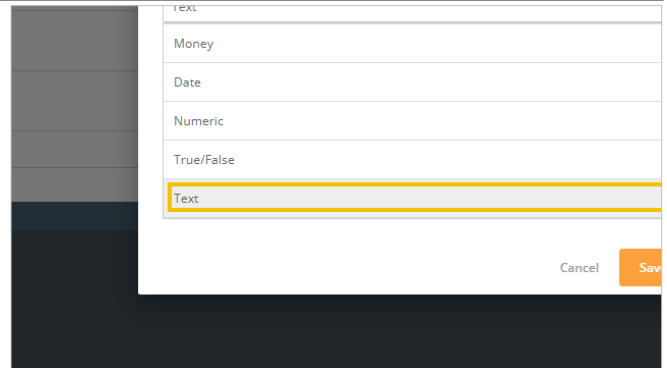
The screenshot shows a form configuration interface. A 'Data Type' dropdown menu is open, showing a list of options: Numeric, Money, Date, Numeric, True/False, and Text. The 'Numeric' option is highlighted with a yellow border.

emfluence Help Section

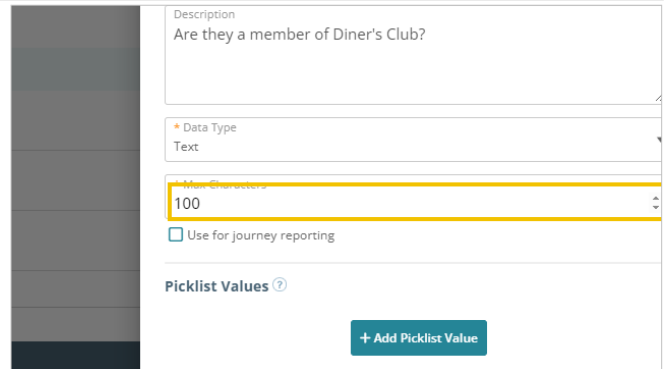
The **True/False** field is a Boolean field that will accept values of True, False, 1, and 0.



The most common type of field is a **Text** field. A text field will accept any Western character.

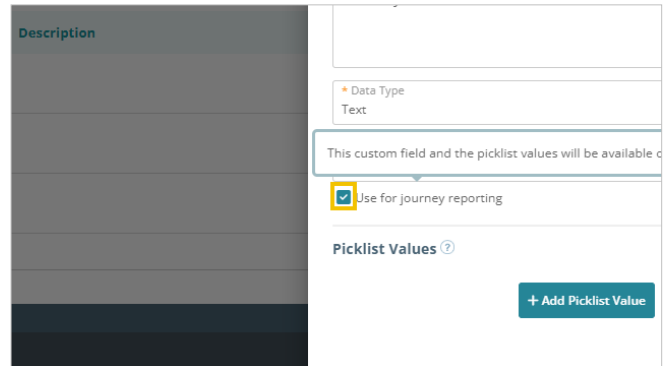


When creating a text field you will need to choose a max character count. By default, 100 characters is chosen. You can expand this up to a maximum of 1,000 characters. No value larger than that can be saved in a custom field.



If you wish, text fields can be used in **Journey Reporting**. To enable this, check the box and add at least a single picklist value.

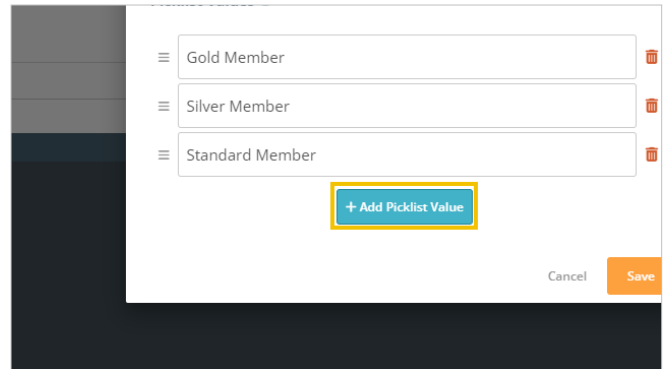
While picklist values are necessary for journey reporting, they are not a requirement for all text fields. Text fields without a set of picklist values will allow any value, so long as it isn't over the max character count, to be saved in the text field.



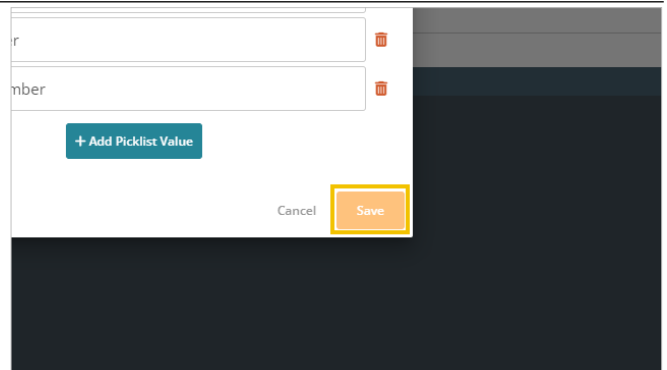
emfluence Help Section

Picklist Values limit what data can be saved in this field to exact values listed here. Attempts to save a different value to this field will fail.

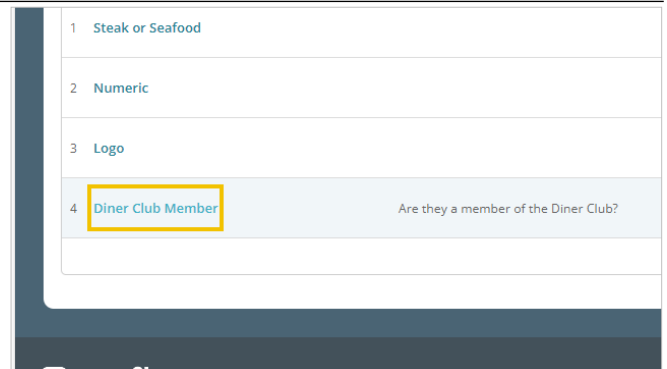
Picklist Values can be used to enable Journey Reporting which is visible on the home page dashboard. They may also be in place to limit entries to this field to a very specific set of values.



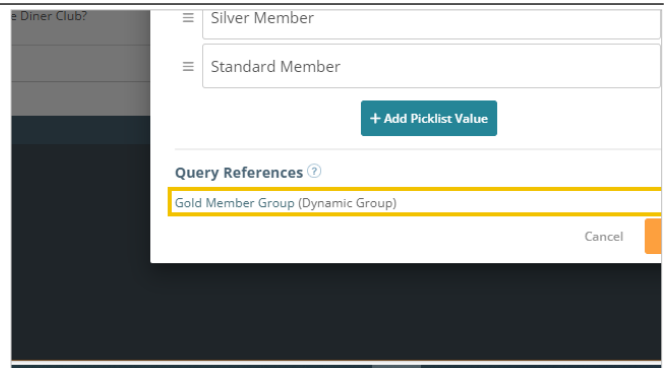
After you have finished creating your custom field, click to **Save**.



To edit a custom field, click on the field's name. This will launch the same pop-up used when creating a field.

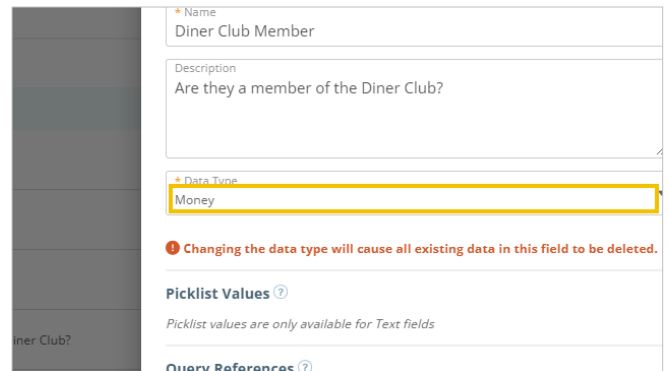


At the bottom of the field, under **Query References**, you will see any saved queries making use of this custom field. These could be in dynamic groups, workflow decisions, or in exit conditions of a workflow. You can click on any result in this section to be taken to that query.

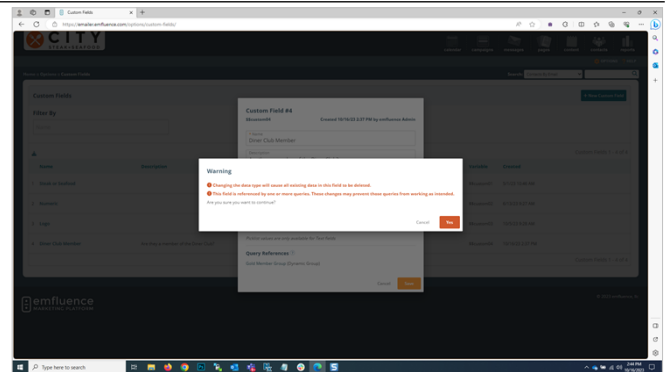


emfluence Help Section

While you can edit any part of the custom field including name, description, data type, text max characters, and picklist values, some changes such as changing the data type would require emfluence to reset all saved values in that field to blank as currently saved values would be improperly coded to be resaved as a different data type. Before attempting to do this, we would suggest downloading your contacts with all values included.



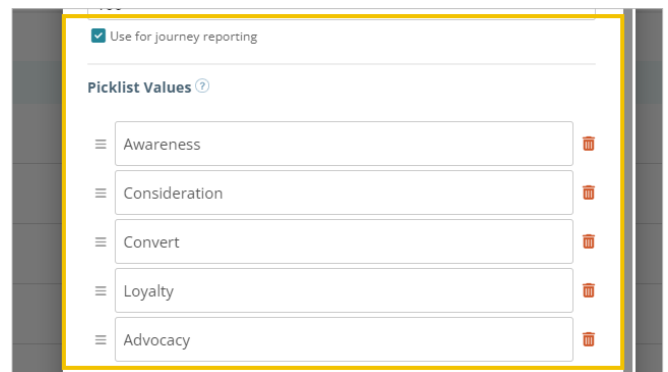
If you choose to overwrite values on your custom field, and click save, you will get a secondary warning letting you know if any queries could potentially be broken by this change and that any saved values in this field will be wiped out. There is no undo button, so just be certain you are ready before proceeding.



14.6. Journey Stage

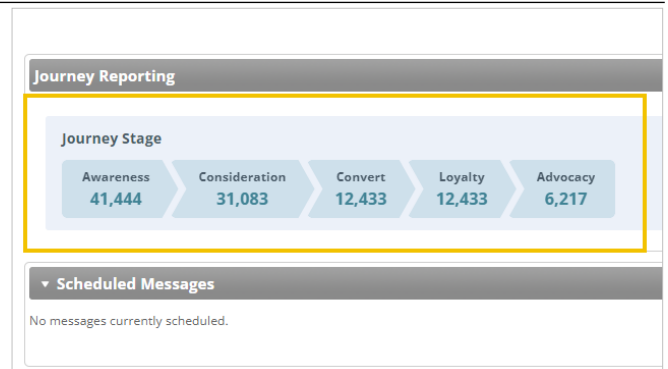
Through saving a set value on a **Custom Field** in emfluence, you can track each of your contacts' customer journey from Awareness through Advocacy.

Simply create your custom field with preset picklist values and remember to check the box to use the field for **Journey Reporting**. Then assign the proper value to each contact, creating subsets of your list you can use within emfluence.

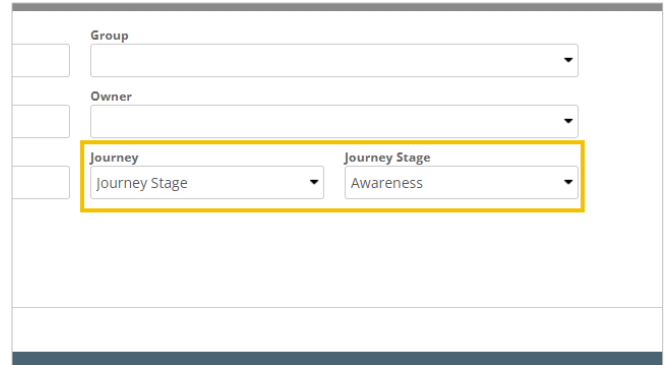


On the home page, if **Journey Reporting** has been enabled for any field, you will see the chart displayed with the breakdown of how many contacts appear in each stage. As with any of the charts on the home page, you can move it up or down in your list through the Options button at the bottom of the page.

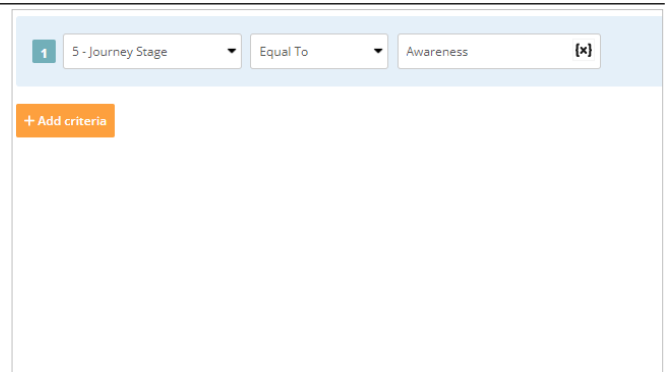
You can click on any of the stages to advance to the Search Contacts page with a list of those contacts in that page displayed.



You can also do a manual search by using the **Journey** and **Journey Stage** filters on the Search Contacts page to search for contacts in specific stages.

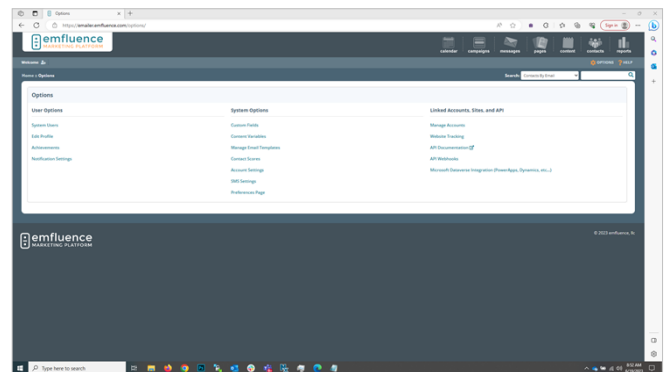


If you choose, you could also make use of **Query Builder** to search and create **Dynamic Groups** for each of your stages to make it easy to market to each subset quickly.



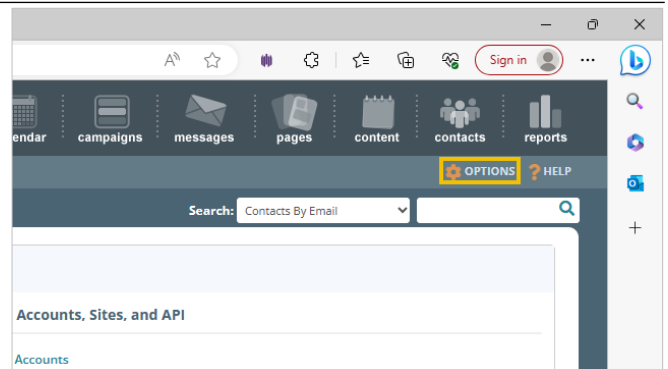
14.7. Notification Settings

In the Options menu, you will find User and System Options where settings can be changed. You will also find Linked Accounts (such as Twitter and Instagram), Website Tracking, information on the emfluence API, and the link to set up your Microsoft Dataverse Integration.



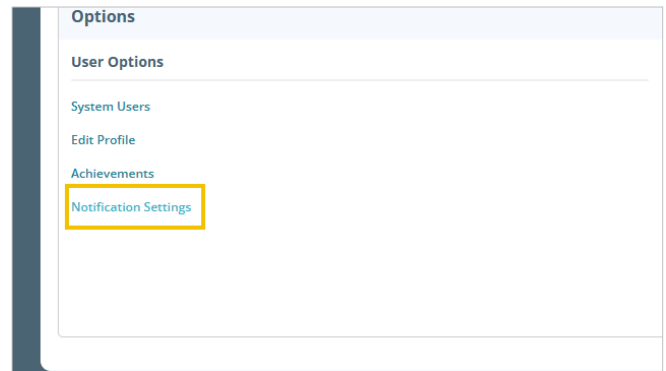
To get to the menu, click on the link **OPTIONS**

NOTE: Depending on your level of permissions, some items in the menu may not be accessible to you.

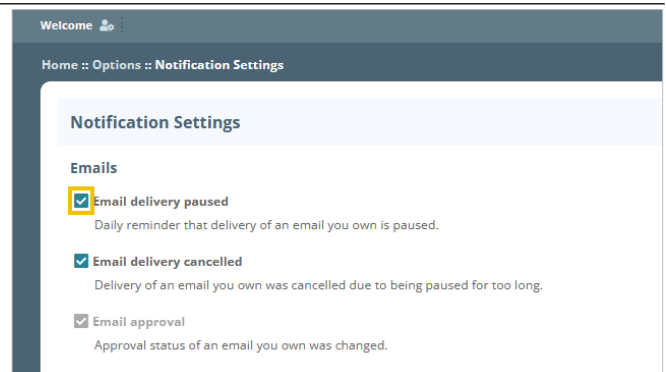


To control what kinds of notification emails you receive, click on the link **Notification Settings**

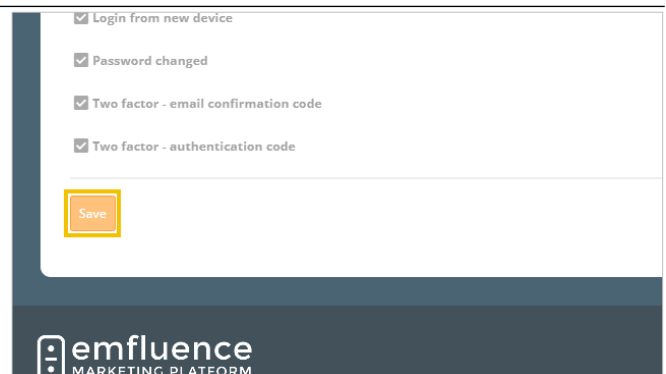
NOTE: Notifications-Only Users will default to this notification menu after logging-in as they are not granted any other access within the emfluence Marketing Platform.



You can edit your preferences by clicking or unclicking boxes in your Notifications Settings. Some types of notifications cannot be unchecked such as those tied to account security and email approval.

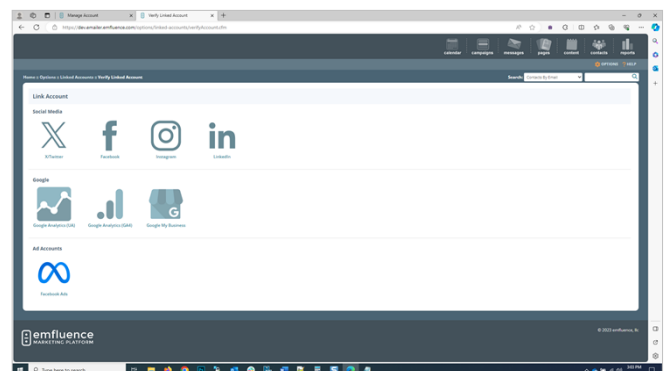


When you have finished making your changes, click on the button **Save**



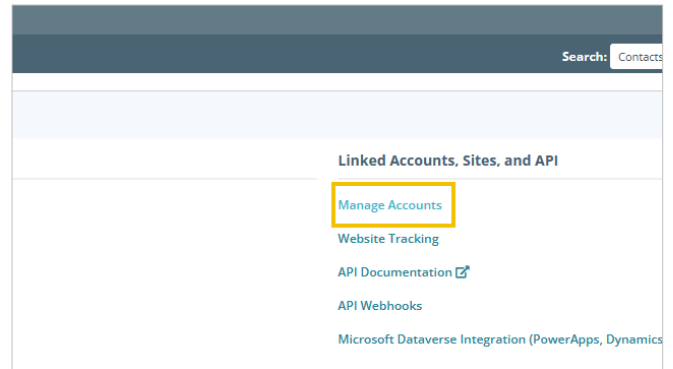
14.8. Manage Linked Accounts

In the Options menu, you can link accounts such as Twitter Profiles, Facebook Pages, LinkedIn Pages, Instagram Business Accounts, Google Analytics, GA4, Facebook Ads, and Google Reviews.

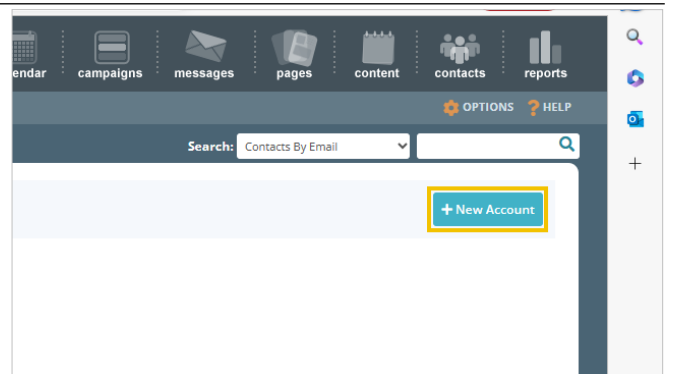


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In the **Options** menu, under Linked Accounts, click on the link **Manage Accounts**



Here you can see and edit any currently connected accounts. To add a new account, click on **New Account**



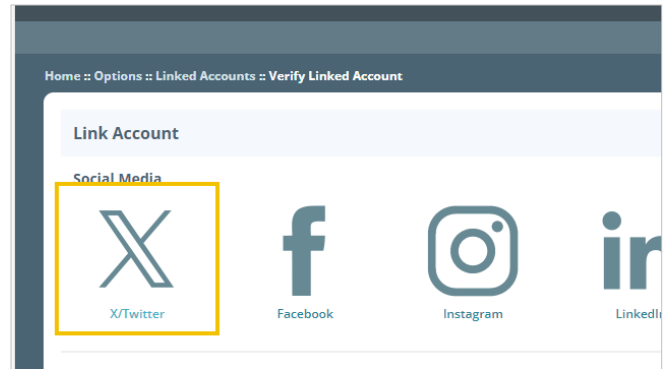
Choose the account you wish to connect. You will need to be logged into that account in order to approve the necessary permissions.

1. **X/Twitter:** Click to connect a X (Twitter) profile
2. **Facebook:** Click to connect a Facebook Page. Because Facebook Pages are owned by users, the prompts will be for your user until the final step where you will confirm a single page you wish to connect.
3. **Instagram:** Click to connect an Instagram Business Account.
4. **LinkedIn:** Click to connect a LinkedIn Page. Because LinkedIn Pages are owned by users, the prompts will be for your user until the final step where you will confirm a single page you wish to connect.
5. **Google Analytics (UA):** Click to connect the older Google Analytics - UA.
6. **Google Analytics (GA4):** Click to connect the newer Google Analytics - GA4.
7. **Google My Business:** Click to connect Google Reviews through Google My Business.
8. **Facebook Ads:** Click to connect Facebook Ads to push emfluence contacts to Facebook as audiences.

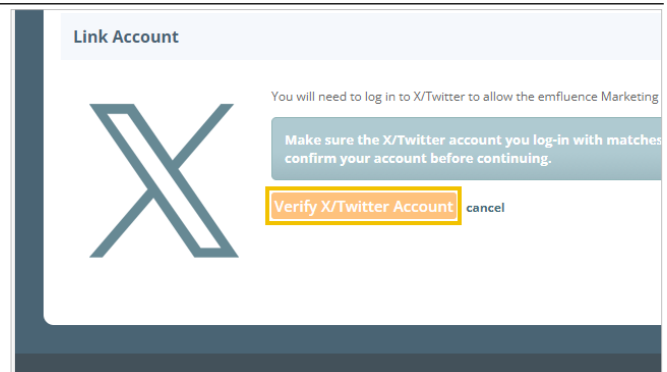


emfluence Help Section

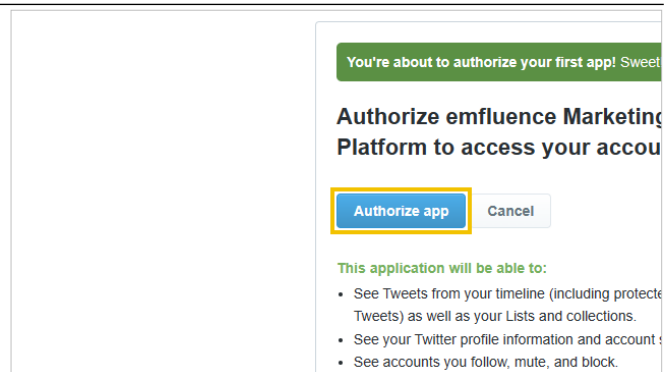
To connect a X (Twitter) account, click on the button **X/Twitter**.



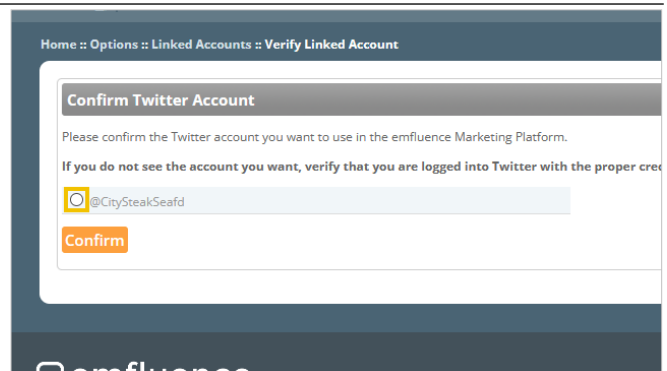
Click on **Verify X/Twitter Account**.



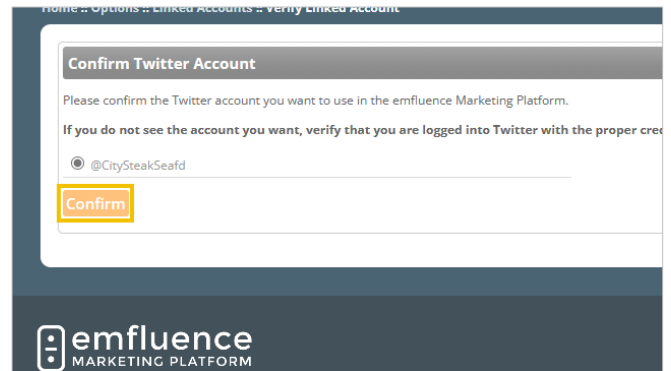
You will need to be logged in to authorize emfluence to connect to your account. If you aren't logged in, you will be prompted to do so. Once logged in, click on the button **Authorize app**



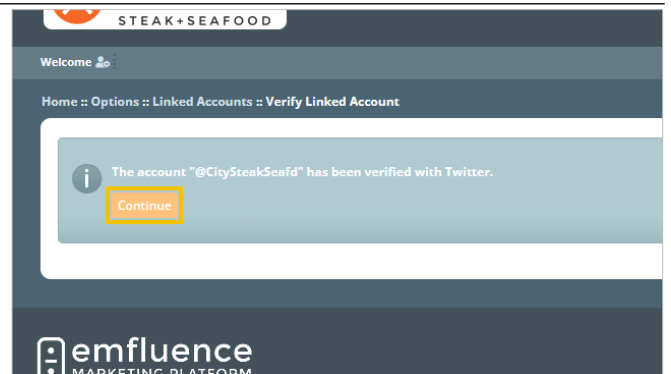
You will be redirected back to emfluence to find all the pages/accounts the user you authenticated has access to. For Twitter, only a single choice will show. For Facebook or LinkedIn, all pages in those accounts will show, and you will click on a single page to finalize your authentication by clicking on the radio button next to your selection.



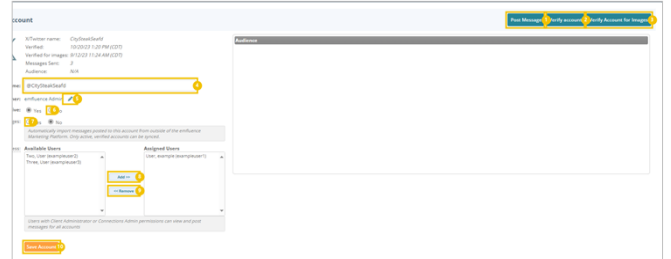
Click on the button **Confirm**



Once verified, you will be prompted to click on the button **Continue**



On the linked account page you will be able to make selections to your account including which users can post from the platform as well as the ability to reverify an account when needed.

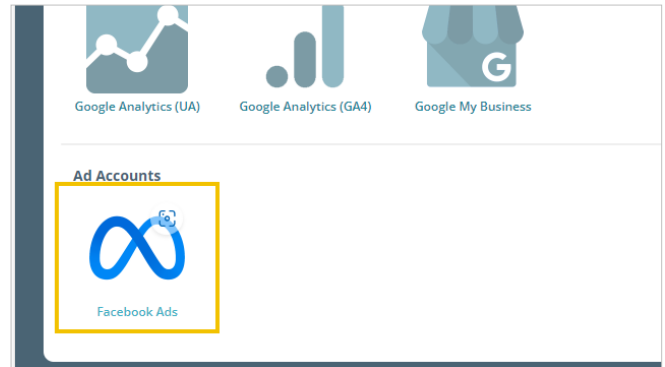


1. **Post Message:** Post new message to this account.
2. **Verify account:** Occasionally you may need to reverify your account because the permission token may expire or the network may have done an update where a new token is required. Click the button and follow the prompts to reverify.
3. **Verify Account for Images (X/Twitter Only):** X/Twitter requires a secondary verification in order to post messages that include images. Occasionally you may need to reverify.
4. **Account Name:** You can change the display name for how it shows within emfluence. This will not change which account you have authenticated or make any changes to the actual name of the linked account.
5. **Owner:** Change the owner of this account.
6. **Deactivate:** Deactivate the connection to this account.
7. **Sync Messages:** Syncing is set to No by default so only messages created in emfluence will show up in the platform. However, you can choose to sync to Yes in order to pull in metrics for that account wherever messages are posted. For official branded accounts, emfluence recommends setting this to Yes.
8. **Add User Access:** To add users to the assigned column, find them in available users, click on them to select them, and click

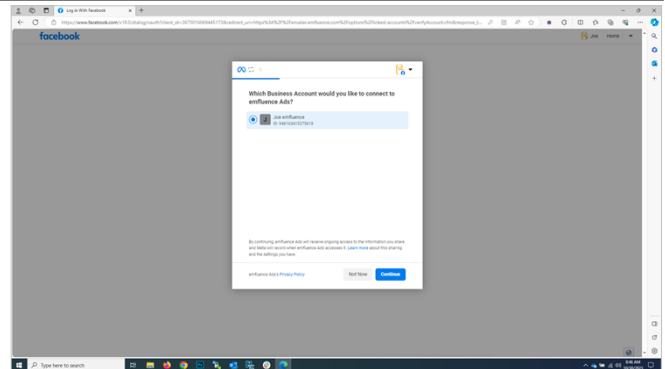
- the Add button.
- 9. **Remove User Access:** To remove users from the assigned column, find them, click on them to select them, and click the Remove button.
- 10. **Save Account:** Don't forget to save changes made to your account.

14.9. Connecting Facebook Ad Accounts

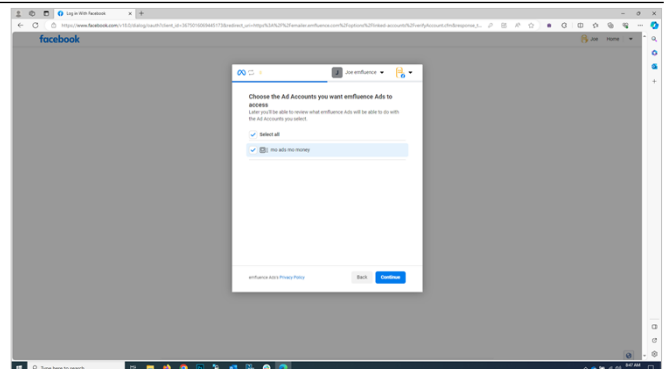
You can now connect a Facebook business account and push a group of contacts to deliver cross promotional **Facebook Ads**. First you must have an account. To connect, in the Options menu, click on **Facebook Ads**.



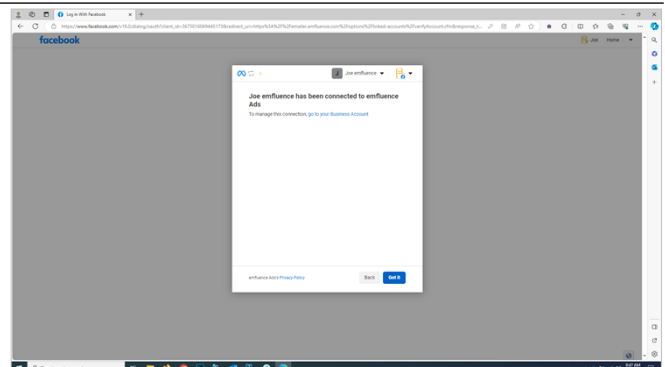
As when connecting to other social accounts, you will need to be logged in to that account in order to walk through the verification steps. Select the account and click Continue.



For Facebook Ads, you must also have a ad account you wish to connect to emfluence. Select the accounts you wish emfluence to have access to and click Continue.



When completing this set up in Facebook you should see confirmation about the connection as well as a link to manage the connection within Facebook. Click Got It to return to emfluence and finalize the connection.



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Select the add account from the list provided and click **Confirm** to complete the process.

Now connected, you can create a synced audience and push those contacts to be used in the connected Facebook Ad account.

