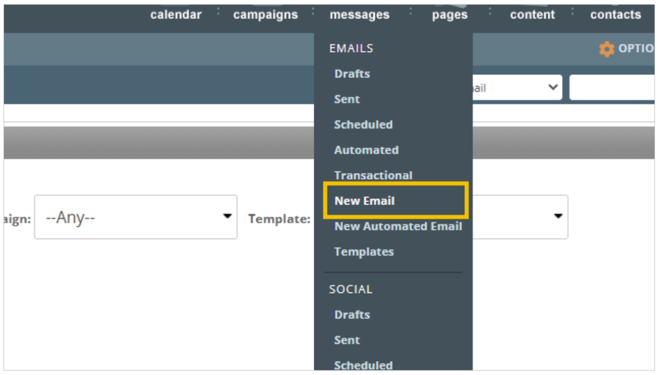
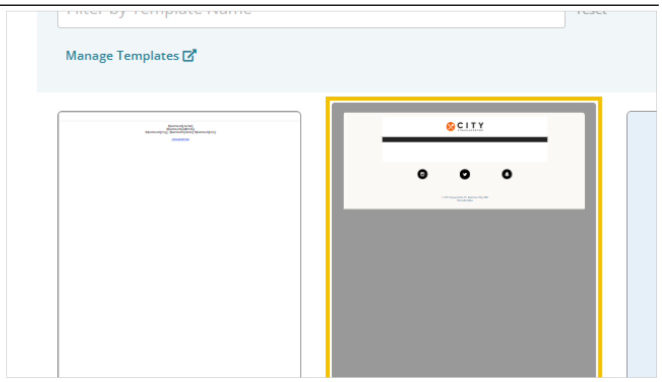
1. Email

1.1. Compose an Email

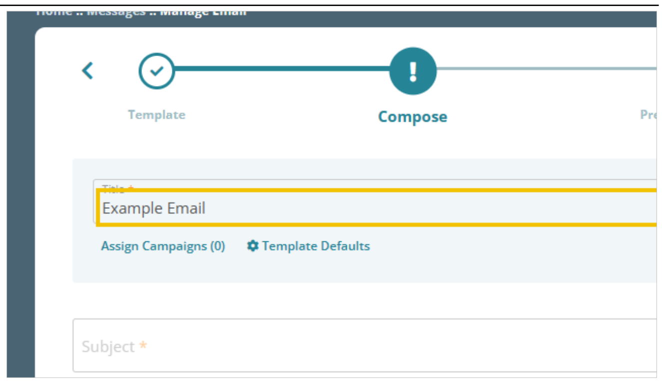
To create a new manual email, which can either be sent now or scheduled to be sent on a date and time in the future, click **New Email**



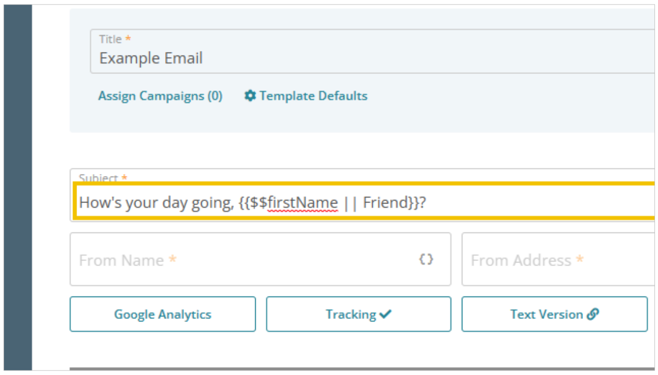
The first step of the compose process is to choose the email template you wish to use. The template provides the branded structure to your email. If you have the email coder permission, you may also choose the Paste in Code option to begin without a template



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

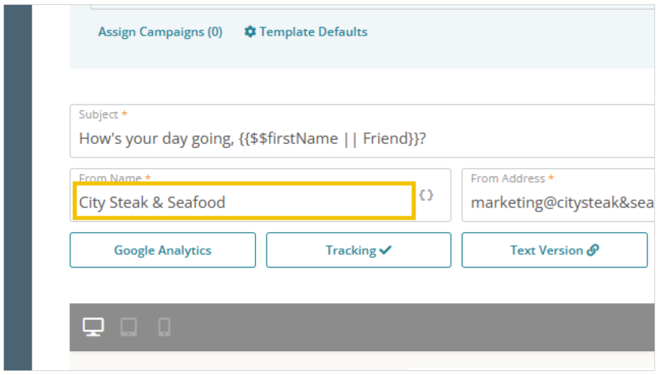


Provide a **Subject** for your email. Subjects can include the use of emojis and also variable content (the variable picker is shown within the Subject line). If you do use variable content, we suggest using a fallback for any contacts who do not have data saved in that field



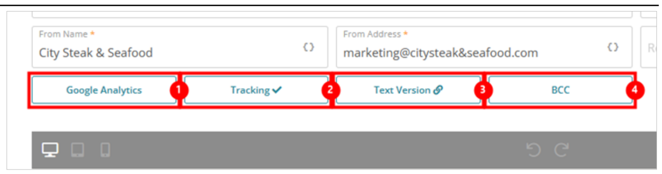
Type in the **From Name** and **From Address** you will be using which your recipients will see. Only domains authenticated within emfluence can be used in the from address field.

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.

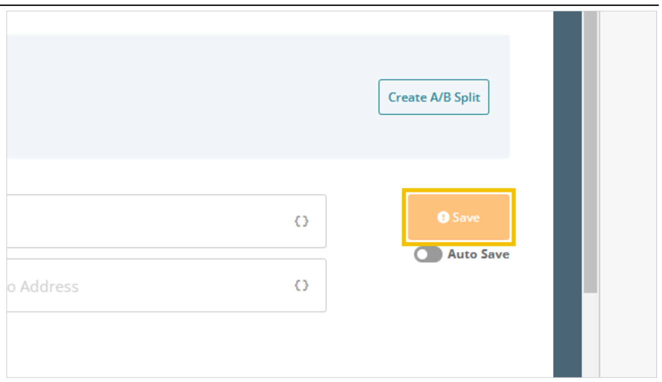


Below the inputs, you can choose to add, edit, or change:

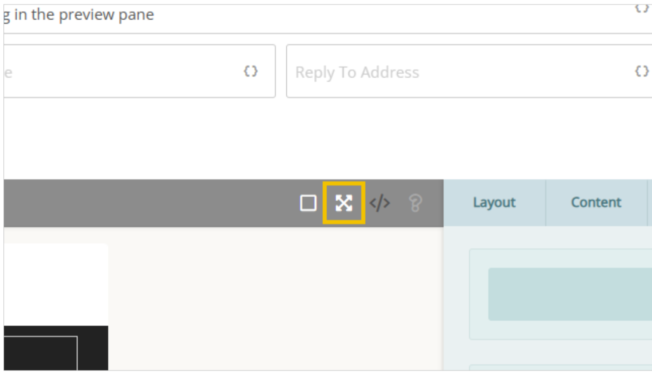
1. **Google Analytics**: Turn on and adjust the settings for Google Analytics on this email.
2. **Tracking**: Turn off View and/or Link Tracking on your email.
3. **Text Version**: View and Edit the Text Version of your email.
4. **BCC**: Add a single BCC address which will receive a copy of every individual's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



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

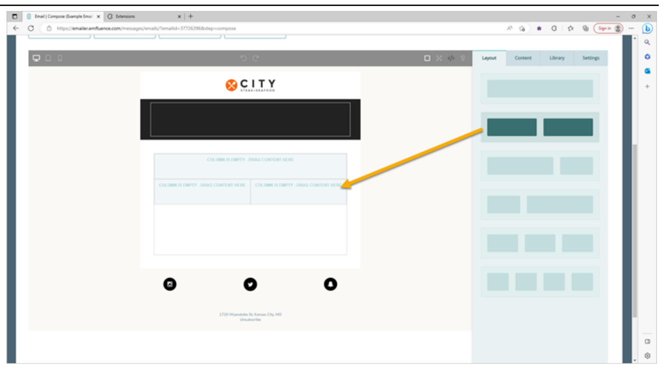


Now that the top information has been saved, we don't need for those fields to continue taking up space on the screen. Click on **Fullscreen** (the large X) to expand the compose window

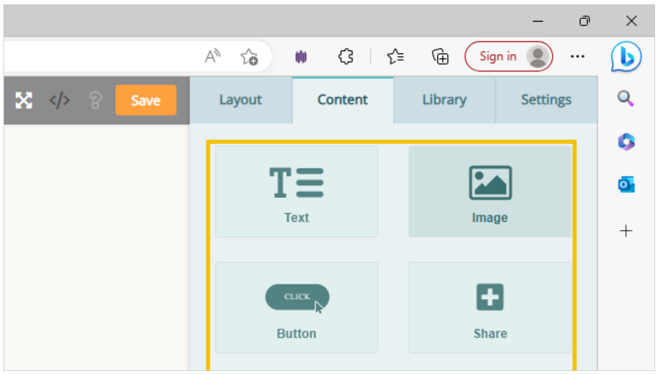


Now you can drag **Layouts**, **Content Elements**, and saved **Library Items** into any of the editable areas in your email (those not locked down by your template).

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.

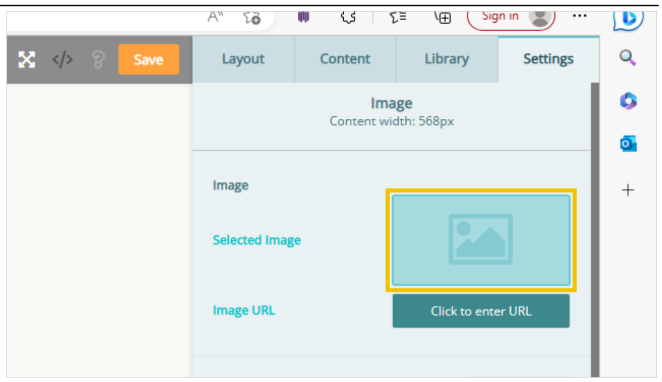
Embedded Video allows you to link directly to a mp4 video which can play in the email for inboxes that support this functionality along with providing a fallback for those that do not.

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

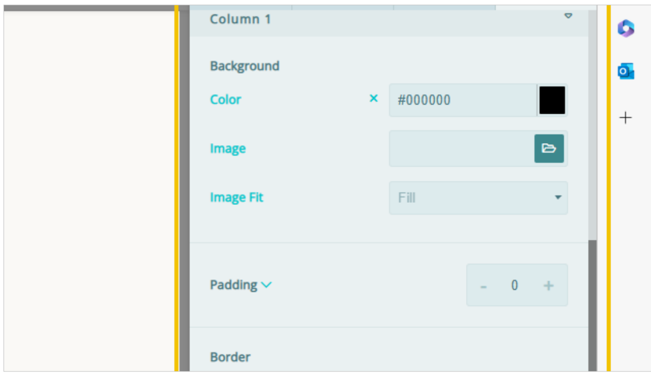
Share adds a share button to your email.

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

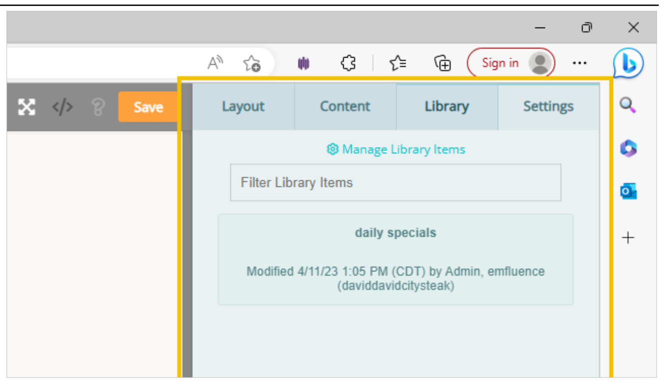


Settings on **Layouts** can be used to format a background color (or format the columns to different colors), change the order in which columns stack, and set border and padding settings

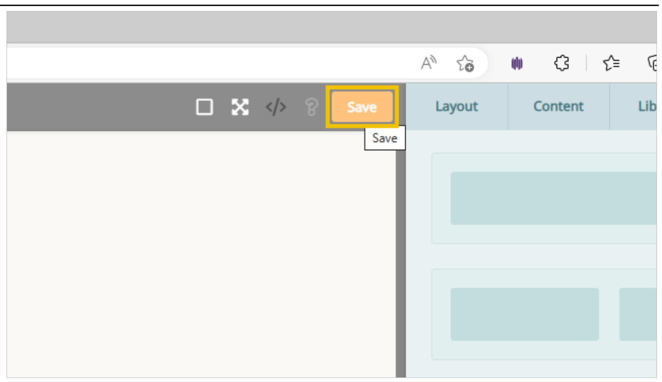


Library Items are pre-used content which has been saved for later use. These can be simple items such as a formatted button or more complex such as everything with a Layout including Images, Text, Buttons, Spacers, and more.

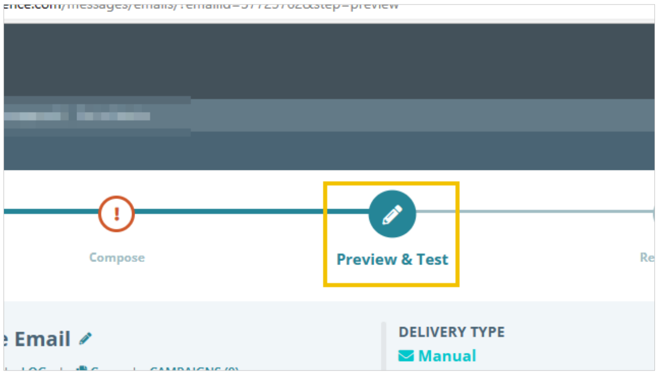
As with Layouts and Content Elements, Library Items can be dragged from the menu and dropped into your email



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

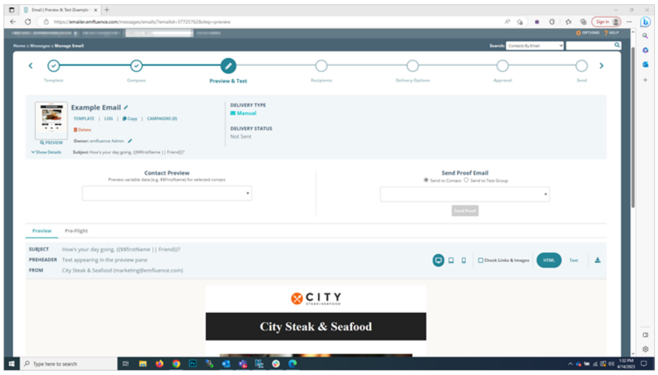


With your email complete, you can move forward to the **Preview & Test** step to test your email**, the Recipients** step to assign groups to receive your email, the **Delivery Options** step to schedule your email. the **Approval** step to request approval (only necessary if your account uses one or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

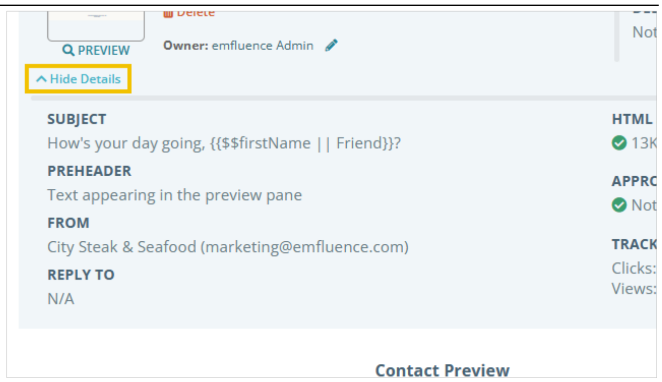


1.2. Preview & Test an Email

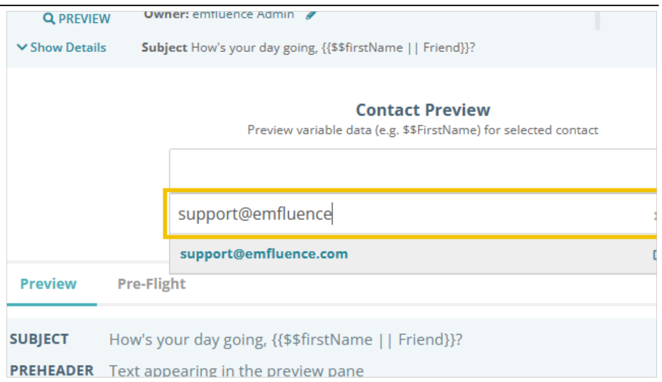
The Preview step allows you to check over your email before assigning recipients and scheduling it for delivery



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.



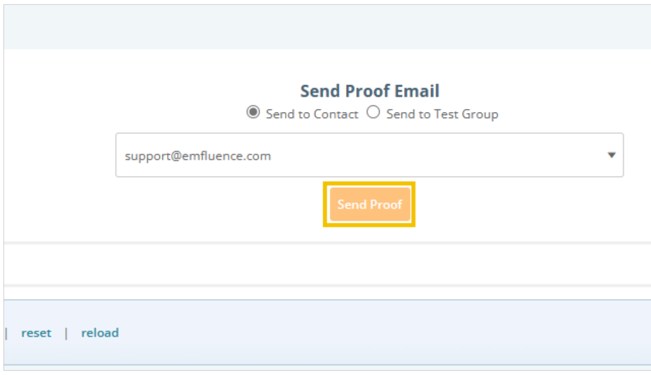
You can use the **Contact Preview** field to preview as any contact. If you are using variable or conditional content, you can use this feature to confirm which content various recipients will receive.
Start typing an email address into the field and select the address from the list. Recently used addresses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

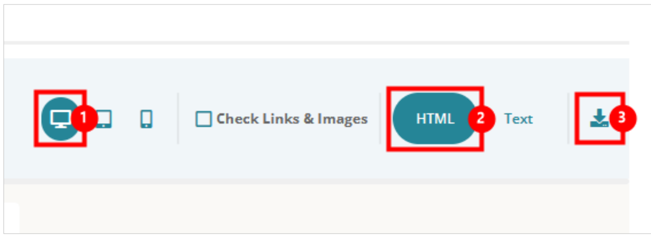
If you are previewing as a contact, you can choose to send yourself the version you would receive or the version the previewed contact would receive.

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.

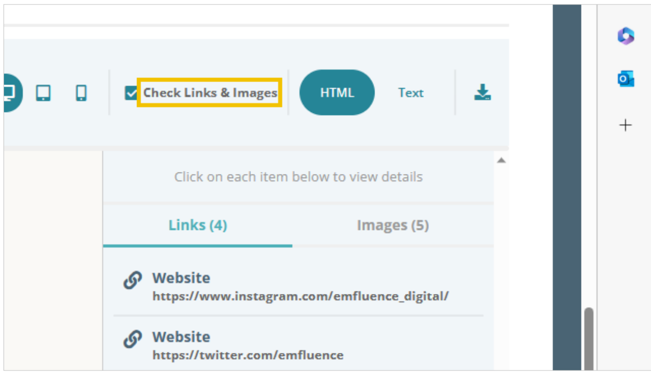


Preview your email on different devices, view HTML and Text versions, and download a copy of your HTML

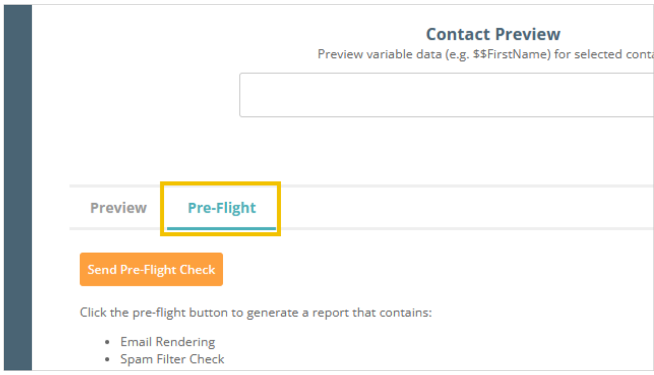
1. **Device Types**: Preview your email on desktop, tablet or small laptop, and mobile
2. **HTML / Text**: Preview both the rendered HTML and Text versions of your email
3. **Download**: Download the HTML of your email



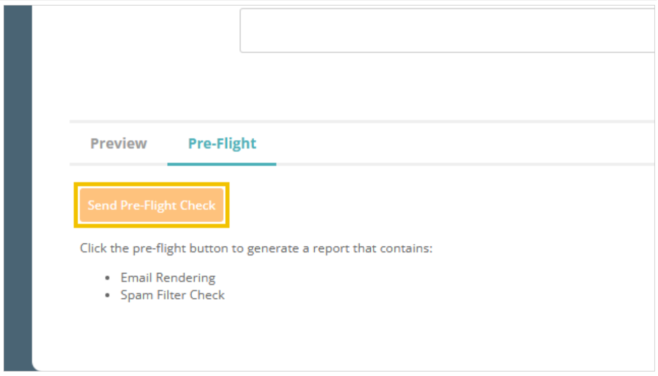
Check the box for **Check Links & Images** to learn if there are any known issues with your images (such as missing alt text) or your links (such as buttons without links or invalid URLs).



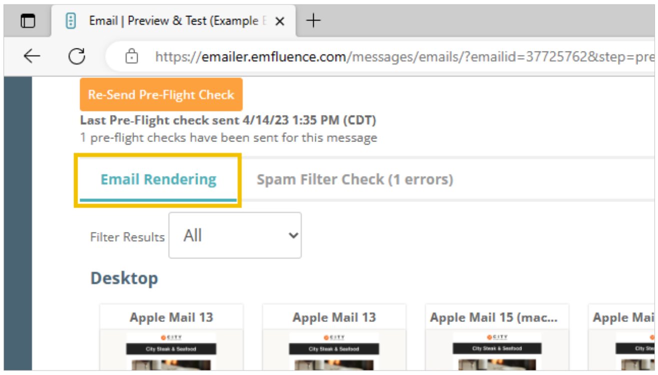
Pre-Flight is used to test how your email will render in different inboxes. emfluence will wrap up your HTML send it to Email on Acid who will render your email in different inboxes and devices, screenshot each one, and return results which can be previewed.



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.

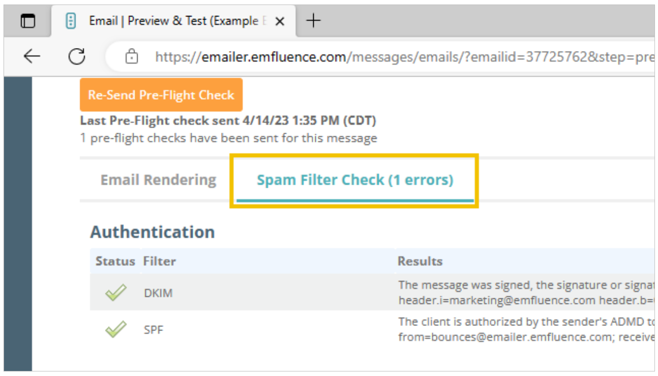


Under the **Email Rendering** tab you will find renderings in different inboxes. You can scroll through them one by one, click into any rendering individually, or use the **Filter Results** dropdown to narrow those shown.
NOTE: Some renderings take longer than others to return. Please do not re-click the pre-flight button as that will start an entirely new set of renderings.



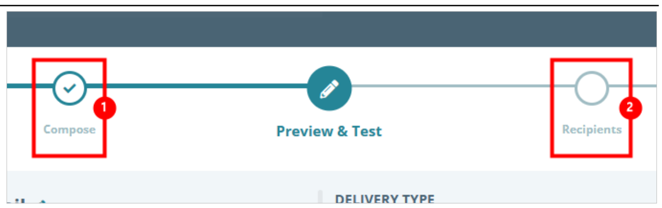
You can click on any rendering to view how the email showed up in that inbox. You can go through each example individually, or more likely, look for known inboxes from your device reporting to confirm the the email looks good to where your recipients are opening.

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.



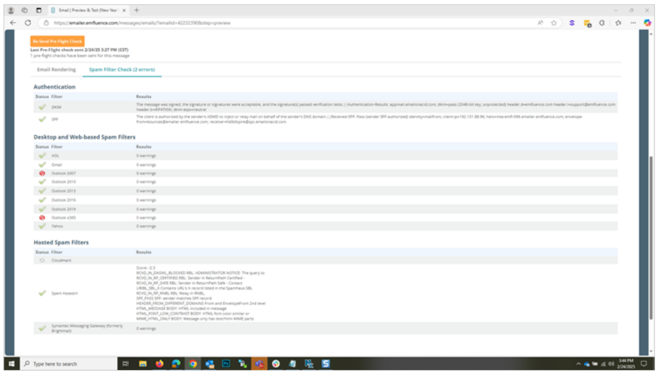
When finished on Preview, you can return to the Compose step or move forward to the Recipients step.

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.



1.2.1. Troubleshooting

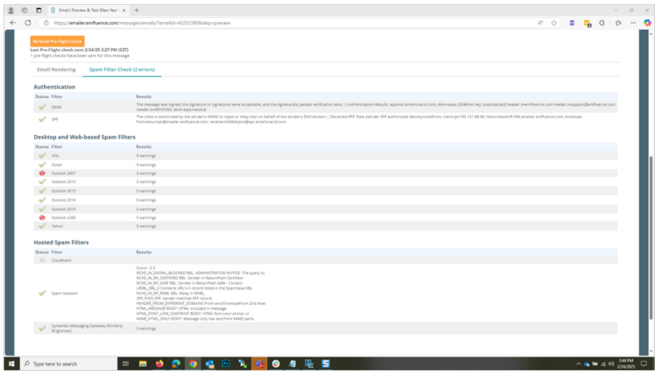
If I'm not passing at a provider does that mean my email won't be delivered?



Not receiving the checkmark doesn't mean the email won't be delivered. It means, all things being equal, your email looks like it will more likely be delivered to spam rather than the main inbox.

Pre-Flight will return results based on the content of your email and your domain's current reputation as calculated against a standard spam setting. What it cannot know is your history with a contact at a domain. If you have a positive history (they have interacted with you in the past, added you to their address book, etc.) you are more likely to get into the inbox.

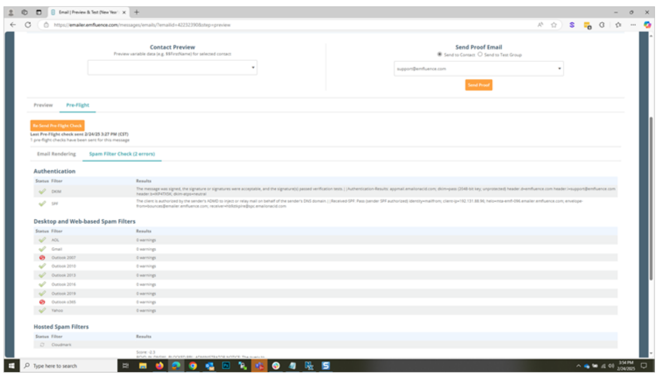
What can I do if I'm not passing?



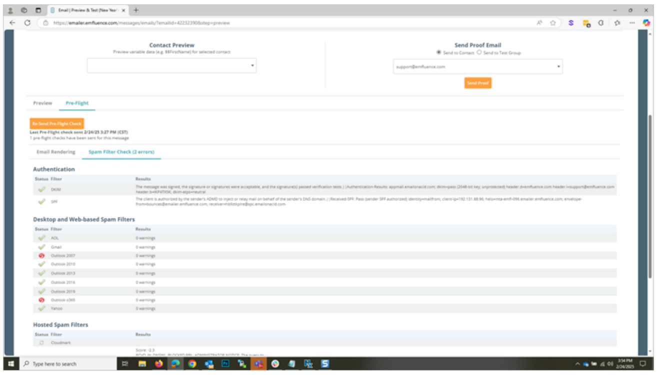
If the content or length of your email is an issue, you can attempt to make changes. Look for overtly sales or marketing language. Avoid phrases that repeat. Don't over use words in all caps or exclamation marks, and remember that Alt Text counts to your score. If the size of your email is quite large, you may try making a copy and shortening it to see if the shorter version passes the spam check.

If the issue is coming from your domain's reputation (which could be caused by recent spikes in complaints, high bouncing, etc.) you may have to earn back reputation over time before you see that change. Inboxes like Gmail which prioritize open rates may also view you as more likely to be spam if contacts are not opening your emails.

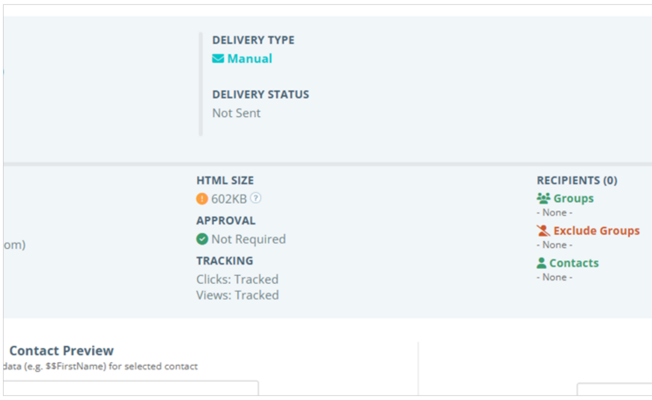
I can receive proof emails at Gmail or Yahoo! but I'm not getting them in my office account.



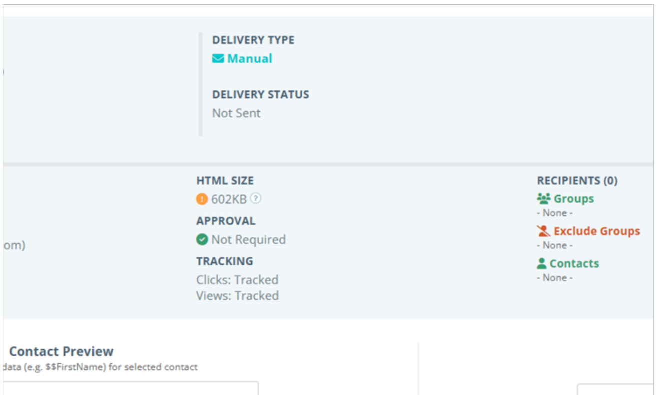
If you are sending as your company domain, through emfluence, back to your company domain, you may see higher level of security in place than for any of your other recipients. The authentication records should properly identify you to your domain and network. However, some internal networks may require additional action to be taken. You can reach out to your IT/Network team, with the date and time of your email, and they can look into why the email failed to be delivered and create rules allowing emails like this through in the future.



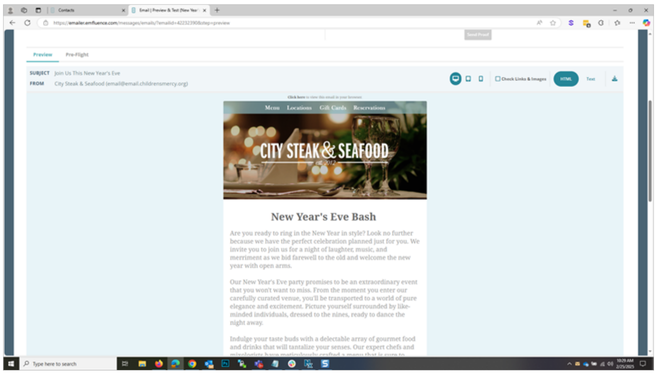
Why do I see a warning that my email is too large?



emfluence will calculate the HTML size of your email (not including images). While all inboxes are slightly different, it's a good idea to keep your emails under 100KB to avoid deliverability problems. If your email is too large you will see a warning appear. Check your email to make sure you haven't unintentionally included unnecessary code in your email or template (plugins like Grammarly can insert code that will get saved) or make sure you are not using Base 64 encoding. If your size is too far over the limit, emfluence may not deploy the email.



What is wrong with the formatting of my email?



Through the rendered preview version, Pre-Flight, and sending Proofs, you can test and view the email rendering. Common reasons for formatting issues include:

Pasted values from Microsoft Word or website.

Each of these is going to have their own formatting which may be quite different than how that is accomplished in emails. We suggest you never paste formatted text directly into the editor which might bring other code into play which could effect your email in a variety of unexpected ways. Instead, consider using the Paste as Plain Text Option.

Making a chain of copied emails.

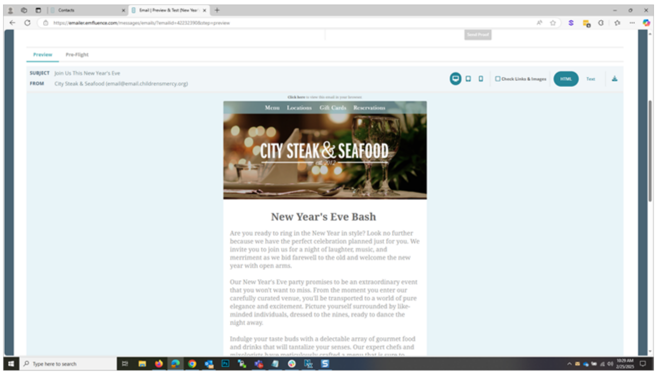
emfluence allows you to copy a previously sent email. However, you may want to be careful of making a copy of a copy of a copy of a copy (and so on) as with each copy you open yourself up to a small coding issue (perhaps not immeadiately visible) which becomes a larger issue several copies down the line.

Except where you need a copy, we suggest starting with a new message (and making use of Library items for easy content) or making a "starter" draft for a newsletter, etc. and returning to it each time rather than continually making copies of copies.

Browser plugins like Grammarly .

Any browser extension that works by injecting code into your webpage, such as Grammarly, can create potential problems where that code gets trapped inside the editor and saved (potentially balooning the size of your email making it much larger than necessary and possibly adding code that may effect your formatting).

Why does my email have a thin line showing up in Outlook?



A known bug in Outlook will sometimes insert a thin 1 pixel space into an email under certain conditions. This will allow the background color of your email to bleed through looking like a line.

Steps that you can take to try and remove this extra spacing:

Check to make sure you are not using any odd-numbered font sizes. It may sound odd, but Outlook prefers you use even-numbered font sizes such as 10, 12, 14, etc. rather than 11, 13, 15. Simply changing the font size slightly may fix your issue.

NOTE: The font size issue may be or may not be around where the line occurs.

Try to avoid consecutive blank lines, which Outlook doesn't like.

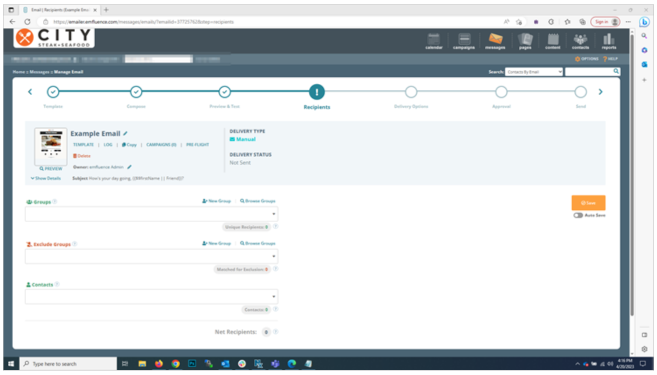
If you need to use a non-breaking space, attempt to add it before you close the table. (This will need to be done in the code view).

You may attempt to add a line of code to your emails to collapse the space.

Or, if the issue can't be resolved, consider changing the background color of the template to match the color of the inside table, which will hide the extra 1 pixel of space.

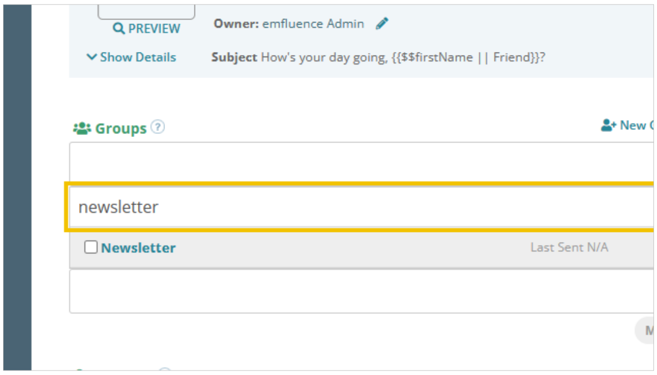
1.3. Add Recipients to Email

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



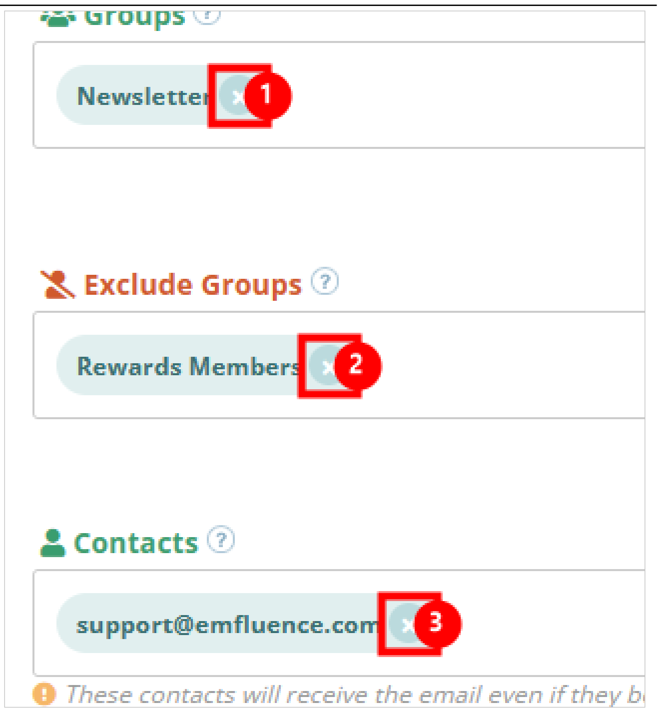
Click under Groups and type the name of the group you wish to add. You can also choose to create a new group or browse your account for a group if you can't remember the name.

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.

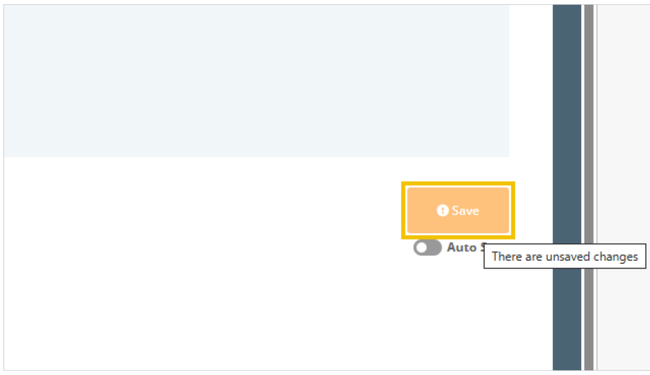


By choosing Groups, Exclusion Groups, and Contacts (for individual addresses to add to the send), you can decide which contacts will receive this email. The counts for each category will be displayed on the page with the final count of Net Recipients displayed at the bottom. NOTE: Any contact added in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

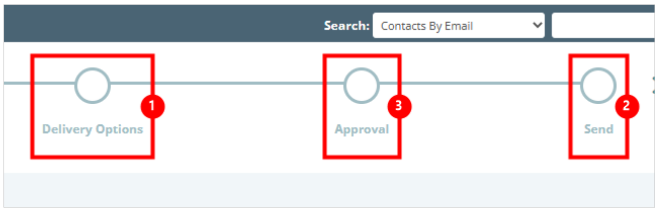
1. **Groups**: Add any groups you wish to receive your email in this line.
2. **Exclude Groups**: If you have occasion to send to one or more groups, but want anyone also in another group to be pulled out of the email, you can add them as an exclusion group.
3. **Contacts**: Add individual contacts to 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.



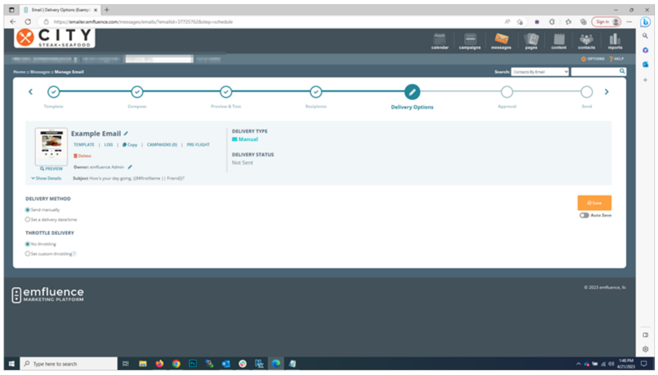
After finishing assigning recipients you can advance to Delivery Options to schedule a send time, or if you wish to send immeadiately* you can advance to the Send step.



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.

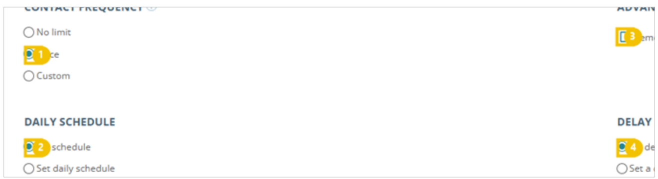
1.4. Email Delivery Options

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.



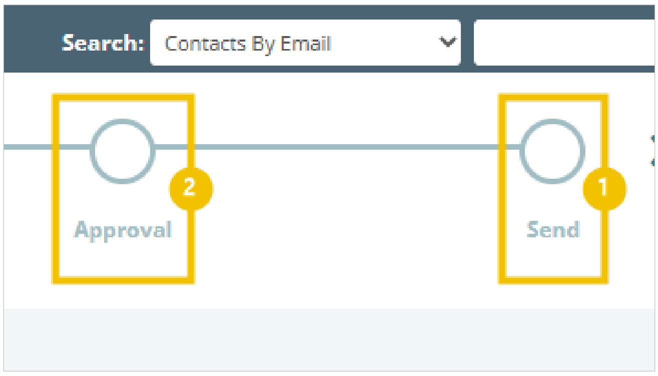
1. **Contact Frequency**: Determines how often a contact can get queued for an email. The default is Once.
2. **Daily Schedule**: Allows you to set a schedule if you want to control the time an email is sent. If a schedule is in place, when contacts are added, they will wait until the scheduled time 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

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.

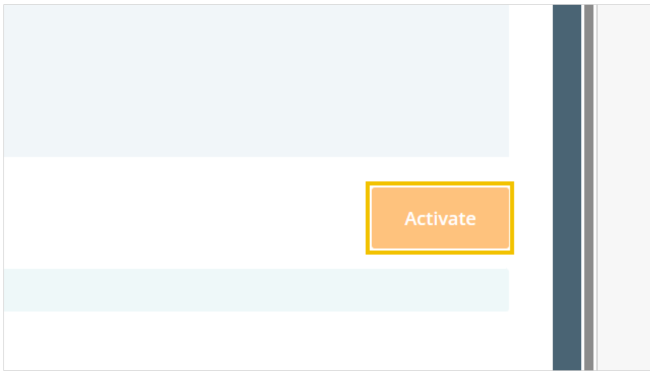
4. **Delay**: You can optionally set a Delay on an email in days, hours, and minutes. If a delay is in place, contacts will be queued for the entire delay duration prior to being sent. Rather than set a delay on an email, you may wish to use a Delay node on a workflow (unless your email is being fed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

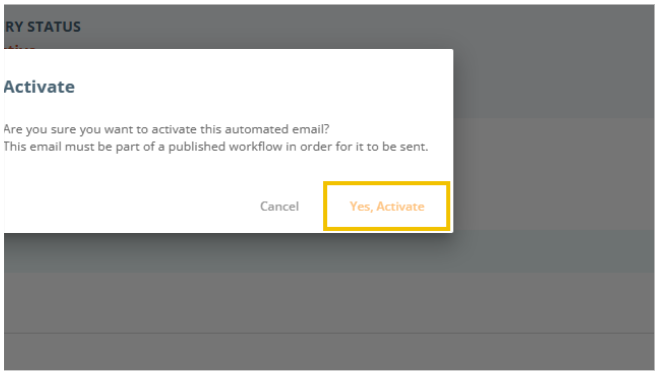
1. **Send**: Advance to the Send step
2. **Approval**: If Approve Mail is turned on in your account, you will need to request approval before being able to send.



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.

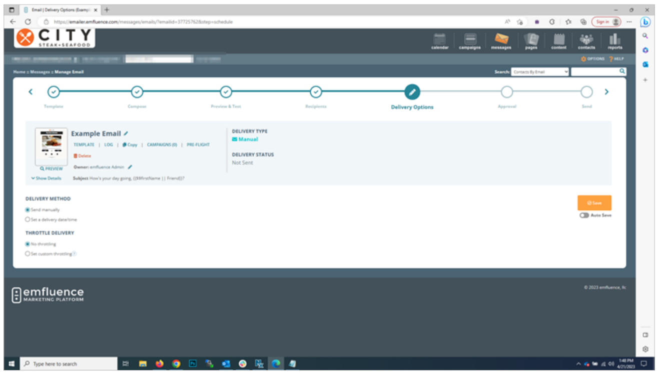


You can confirm your action by clicking **Yes, Activate**.

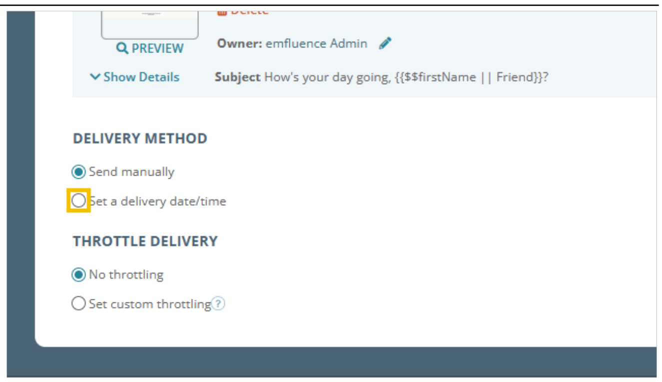


1.4.2. Manual Emails

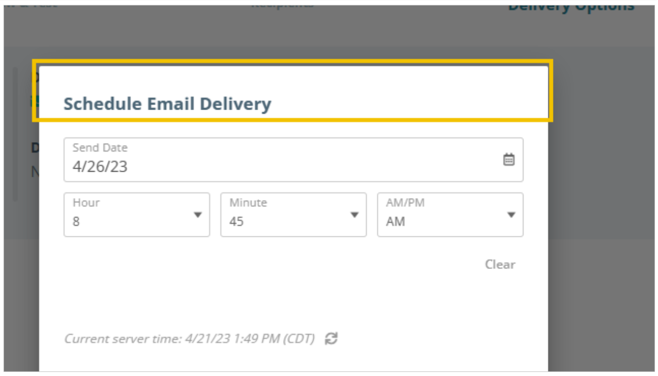
For manual emails, you can schedule and email to send in the future at a specific day and time. If you want to send ASAP and don't wish to set any options, you can advance to the next step.



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

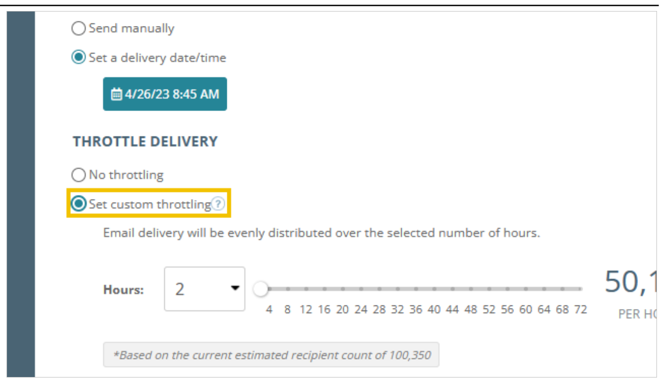


In the **Schedule Email Delivery** pop-up, set a date and time in the future and click **Apply**.

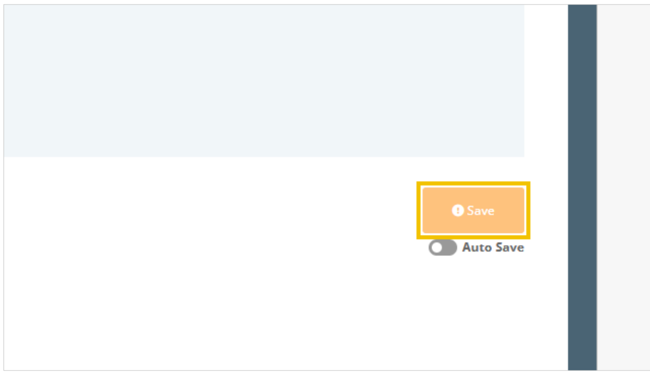


Normally, there is no cause for throtling your send. However, if you do wish to slow down your send, for example to slow down response to your email, and throttle it over multiple hours, you can do this by clicking **Set custom throttling**.

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.

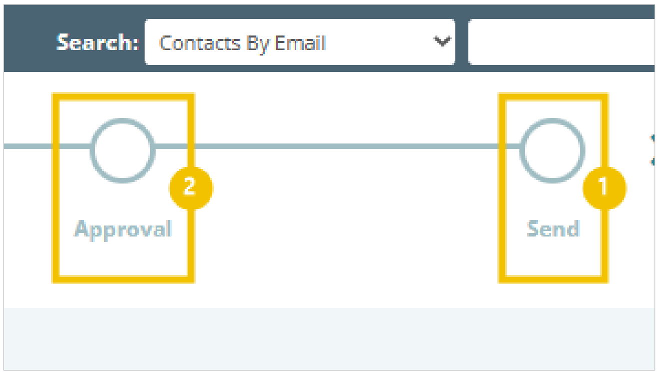


Click **Save**.



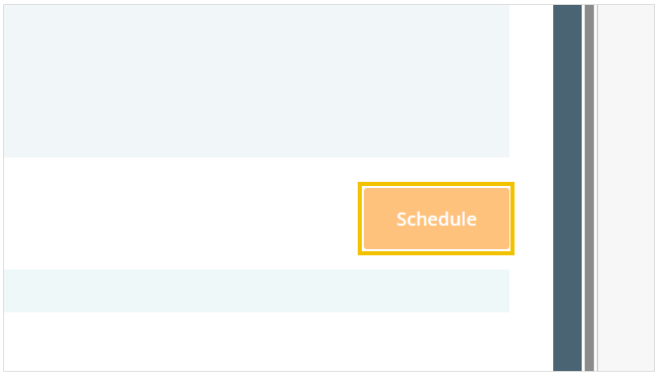
If Approve Mail is not turned on in your account, you can proceed to the Send step. If approval is activated, you will have to request approval before being able to send your email.

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.

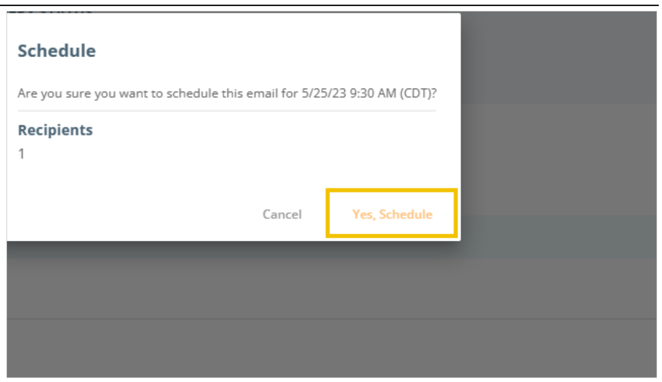


When arriving on the Send step, a check will run to alert you of any errors or warnings. If no errors appear, you can click on the button. If you have set a date in the future the button will say **Schedule**, and if you have set the email to ASAP, the button will say **Send**.

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.



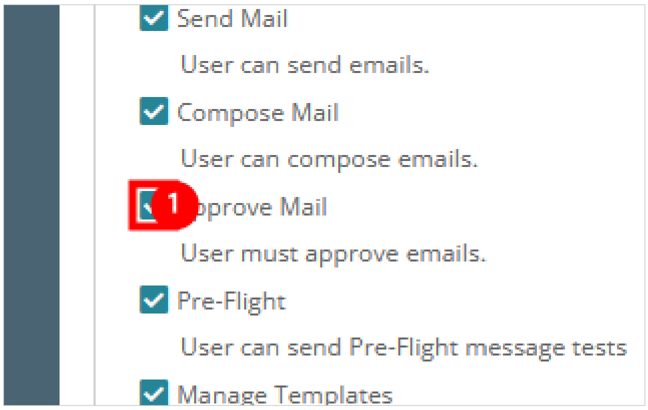
Confirm your choice by clicking on **Yes, Schedule**.



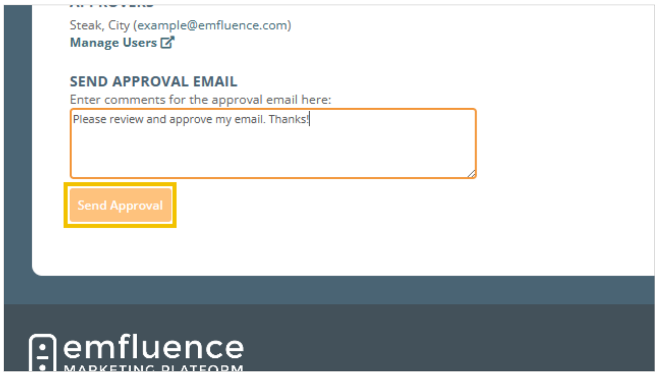
1.5. Email Approval

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.

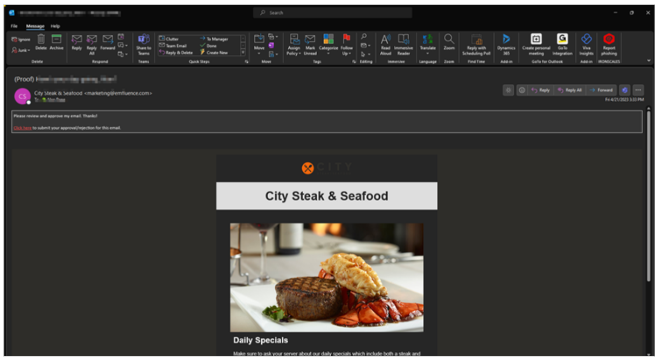
1. **Approve Mail**: If checked, this user must approve an email before it can be sent.



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**.

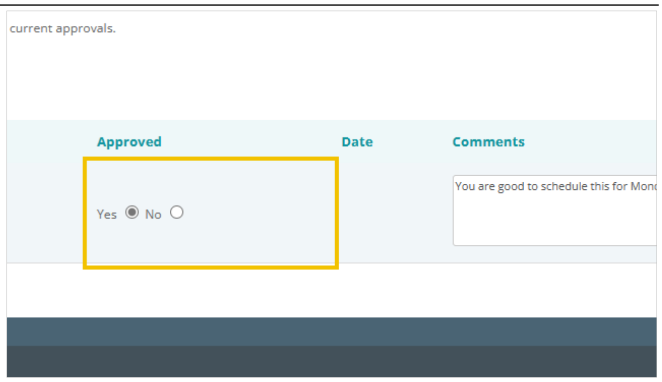


Your approver(s) will receive a proof email with your message at the top and a link which will take them into the platform to either approve or not approve the email.



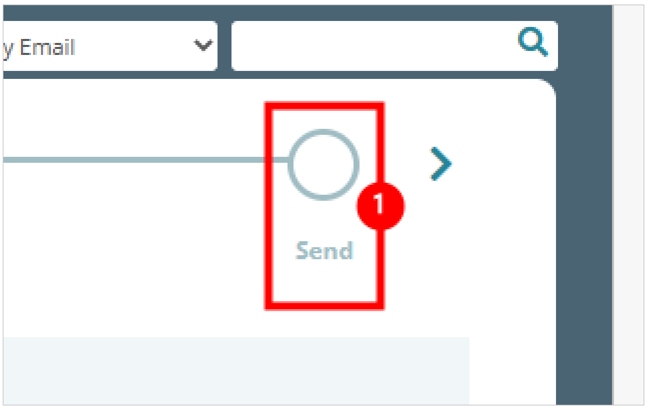
Following the link from the email, the approver can mark the message approved **Yes** or mark it **No** if they deem edits need to be made. They can also offer an optional message such as what the user needs to fix if the email wasn't approved.

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



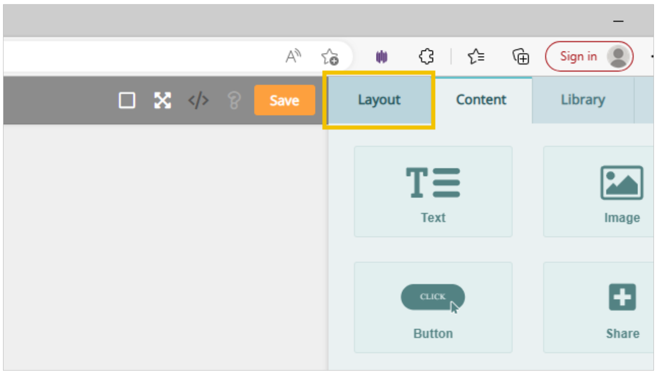
Once approved, you can continue and send the message.

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

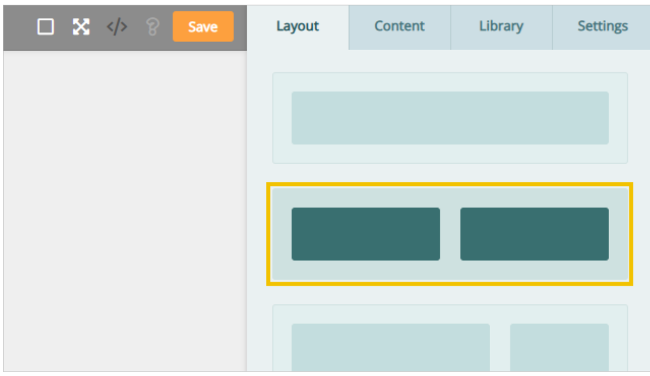


1.6. Drag and Drop Mobile Stacking

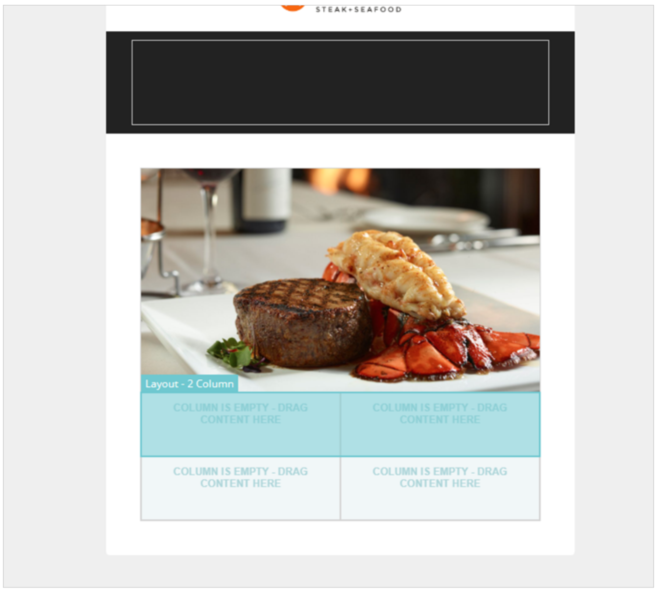
When using Layouts as part of the Drag & Drop editor, you can apply stacking logic to any 2-column layout. To begin, click on **Layout**



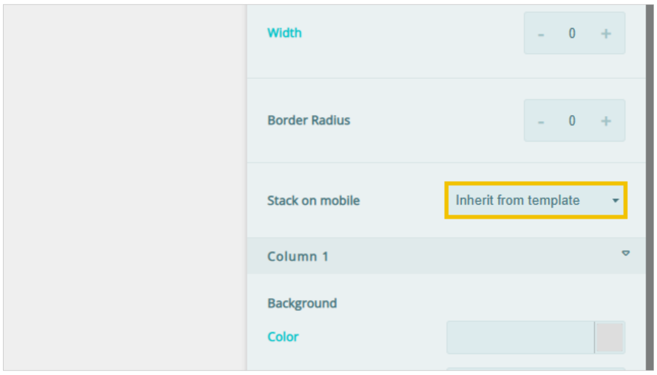
Choose any of the 2-column Layouts (50/50, 30/70, or 70/30) and drag them into your email



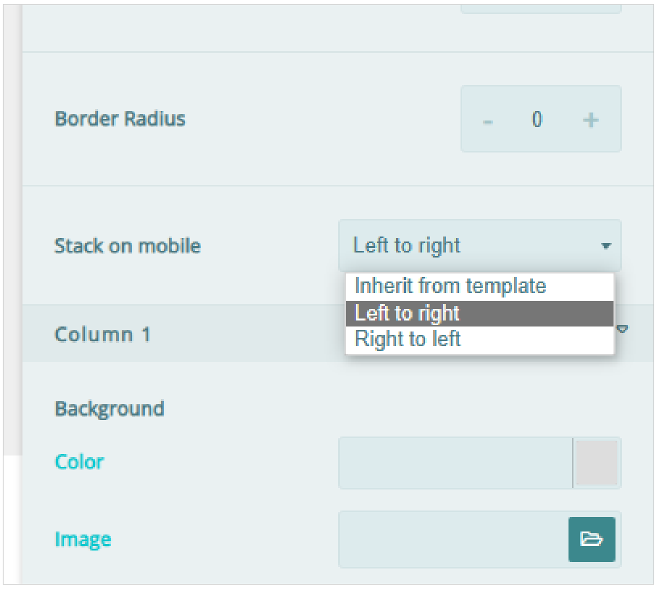
With Layouts now in your email, you can now set stacking logic. NOTE: Your email template must be mobile responsive to make use of this feature



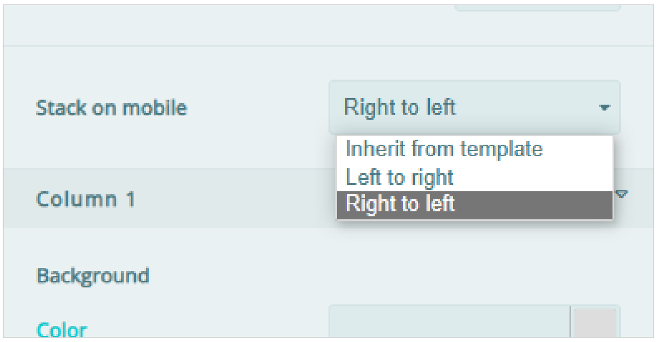
Under **Settings** for the **Layout**, find the **Stack on mobile** section. The default choice will be to **Inherit stacking from the template**



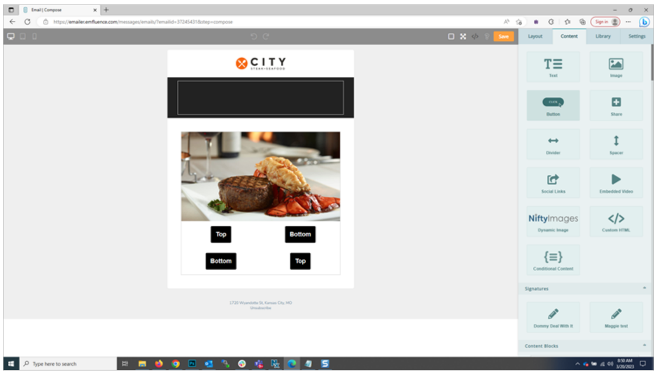
To force a layout to stack Left over Right on mobile, choose Left to Right



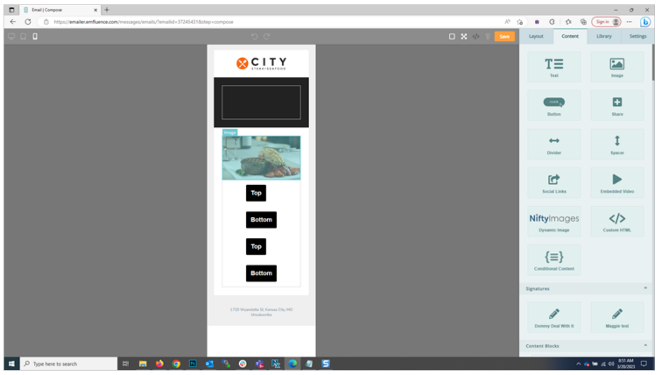
To force a layout to stack Right over Left on mobile, choose Right to Left



Add content into your layouts using the Drag & Drop editor

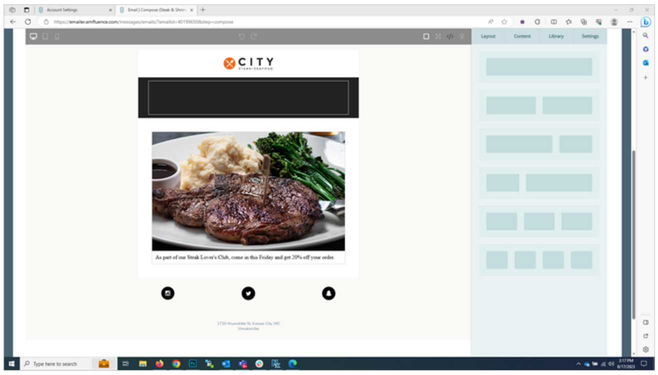


You can preview your responsiveness both on the Compose step and on the Preview step. We suggest also sending a proof to confirm your layouts are stacking as intended in your inbox

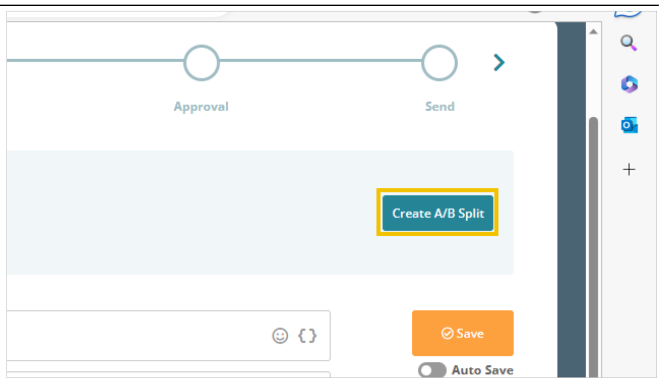


1.7. A-B Testing

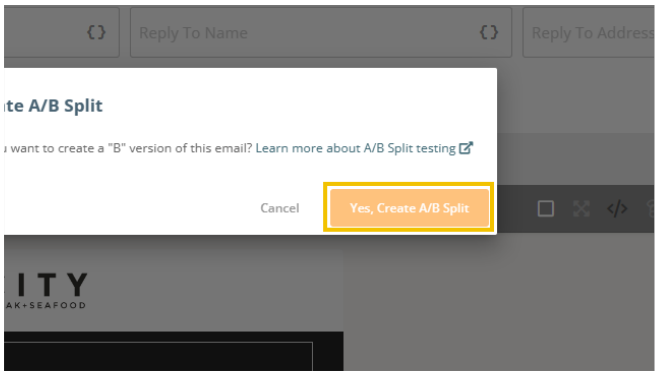
You can use A/B Split to test different messaging to your contacts. Built into manual email sends, you can create multiple copies of an email. Certain segments of the groups chosen will recieve one of your emails with the remainder getting the email deemed to have performed best in your testing.



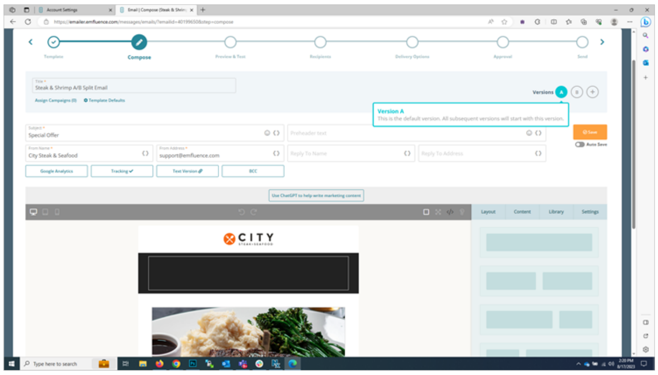
We suggest first making one version of your email, then clicking **Create A/B Split**.



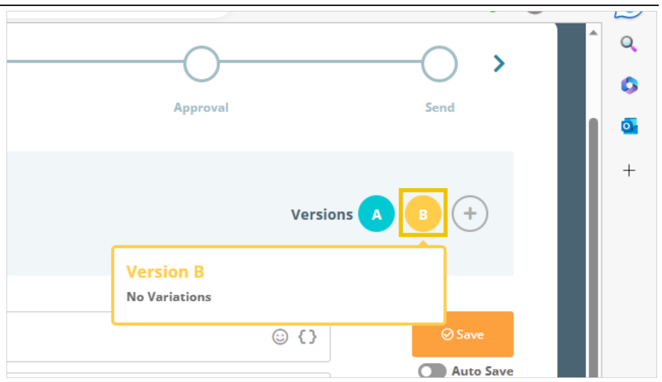
Confirm by clicking on the button **Yes, Create A/B Split**. You can create up to 5 different versions of your email following these same steps.



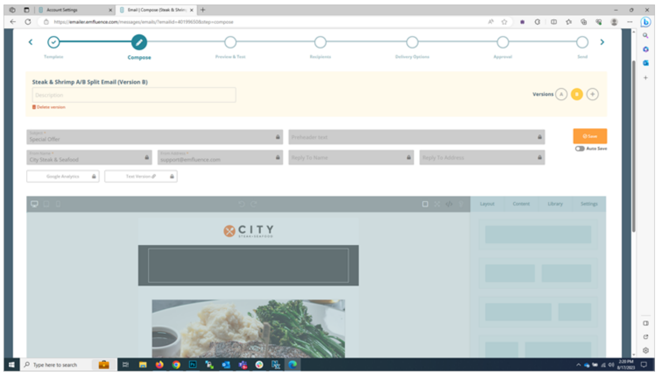
Your original email will now become your A version. You can toggle between versions, to edit them individually by clicking on the letters of each version. To create a third version, click the plus sign and confirm.



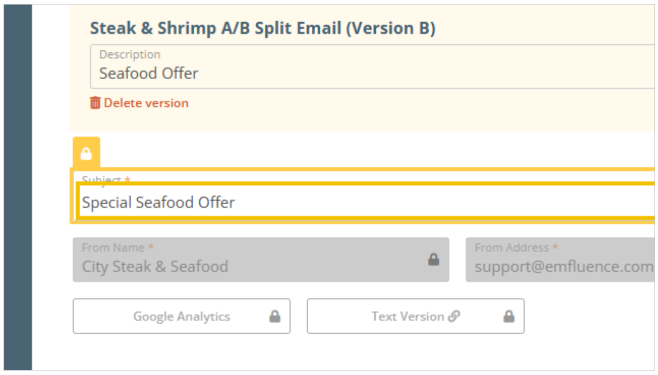
To edit your B version, click on **B**.



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.

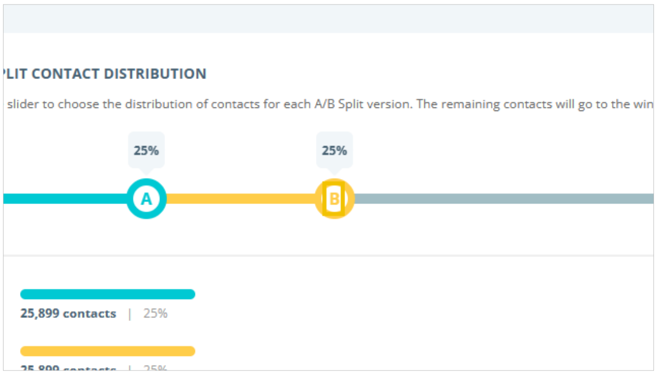


Now unlocked, you can edit the content just as you would any email.

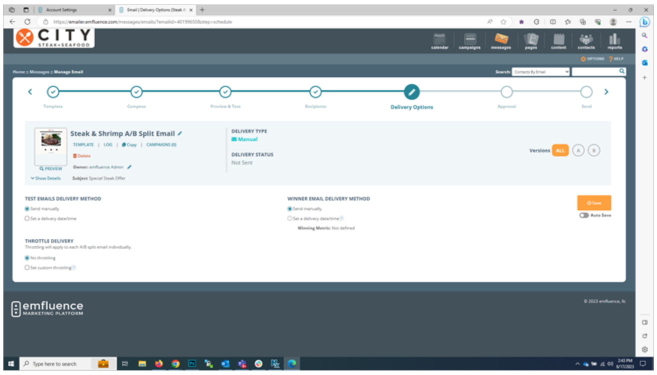


You can preview all versions of the email on the **Preview** step. Advancing to the **Recipients** step, you will choose your group and then set the size of the segments.

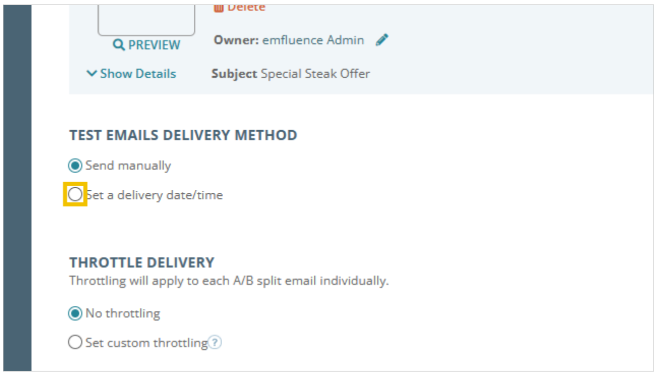
Contacts will be dispersed randomly into the different segments with a section being held out for "winning segment." You can edit the size of each segment using the sliders provided.



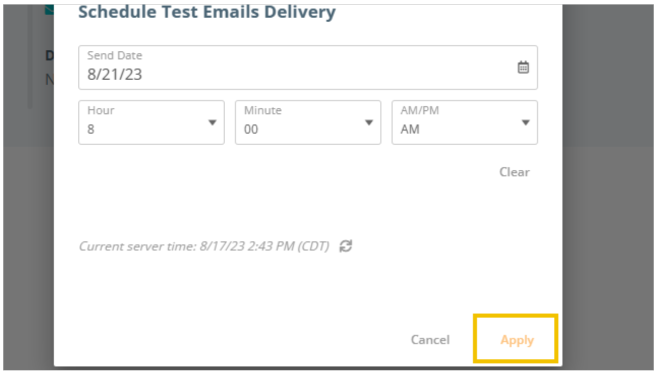
On the Delivery Options step, you can choose to send now or schedule your send. If you schedule your send, you will also unlock the ability to schedule your winning email. If you choose not to schedule your winning email, you can still manually send it on your own.



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

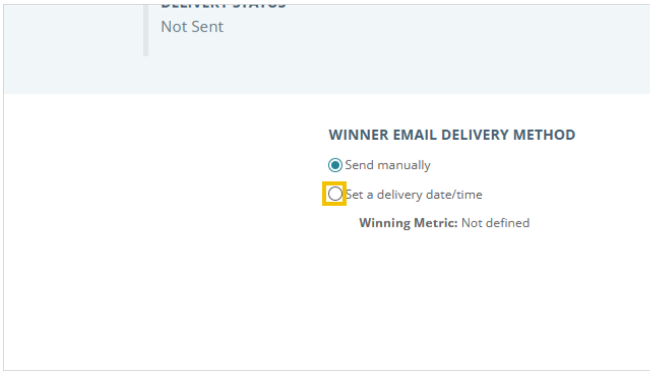


Choose a date and time in the future, and then click on **Apply**.



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.

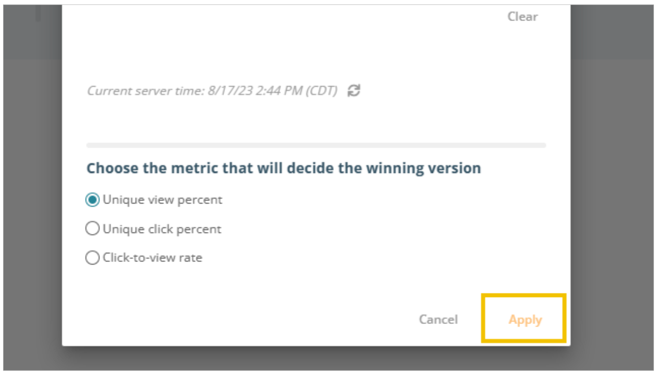


Select your date/time for delivery which will need to be after the time scheduled for your initial segments.

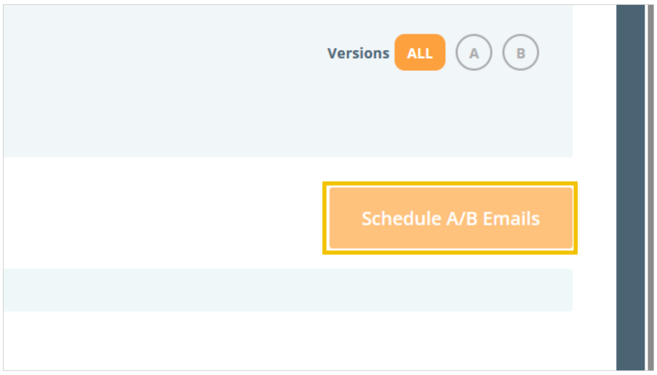
Next, choose your winning metric which can be either the highest view/open rate, the highest click rate, or the highest click-to-view rate.

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

Finally, click on **Apply**.

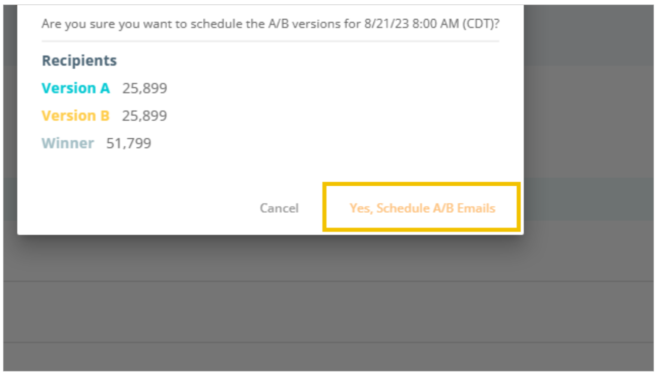


Proceed to the **Send** step and click to **Schedule A/B Emails**.



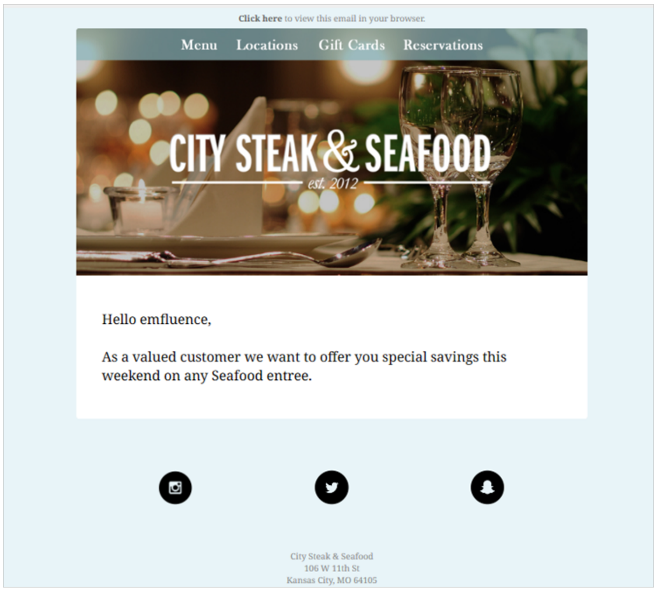
The platform will provide a breakdown of your split. Review and click **Yes, Schedule A/B Emails**.

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.

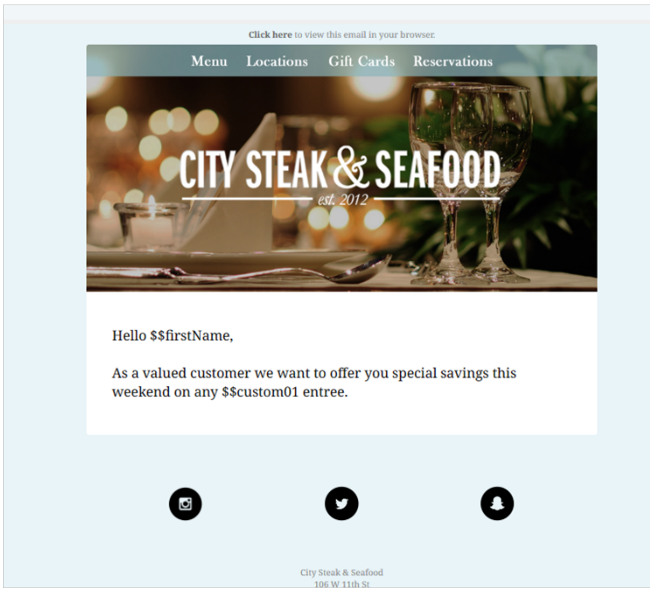


1.8. Using Variable Content

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.

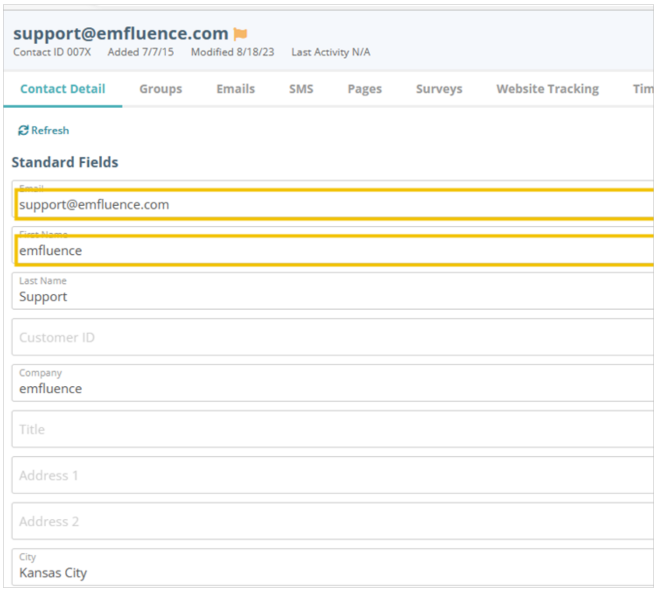


By inserting the variable placeholder in your email, whatever value is saved in that field on an individual's contact record is what will be filled in when they recieve the email

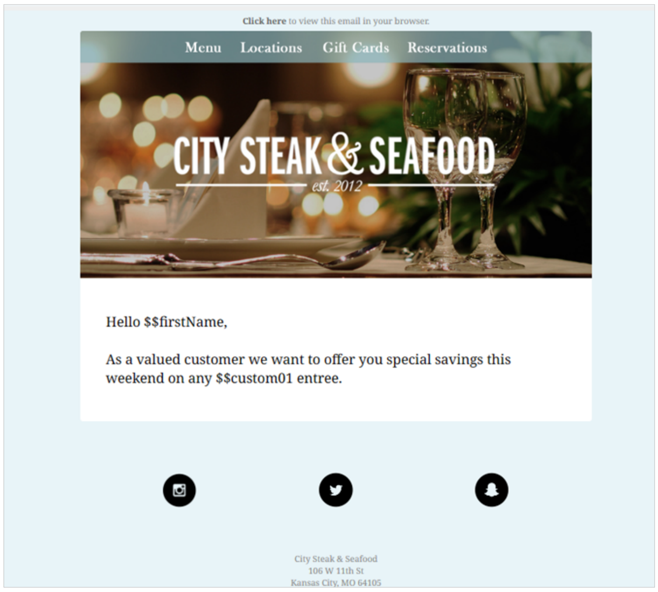


On an import, manual save, API call, or data sync, data is saved on the contact record.

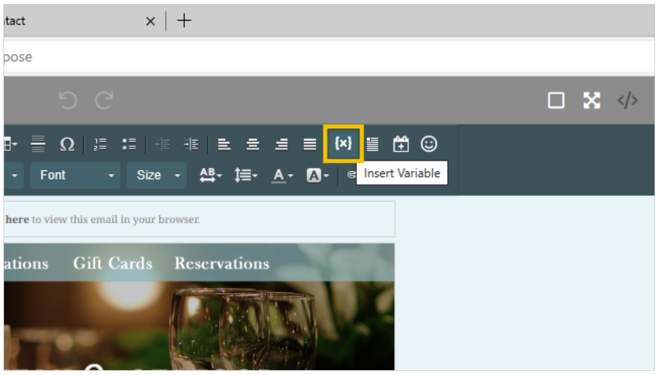
1. **Email**: The saved email address for this contact.
2. **First Name**: The saved first name value for this contact.



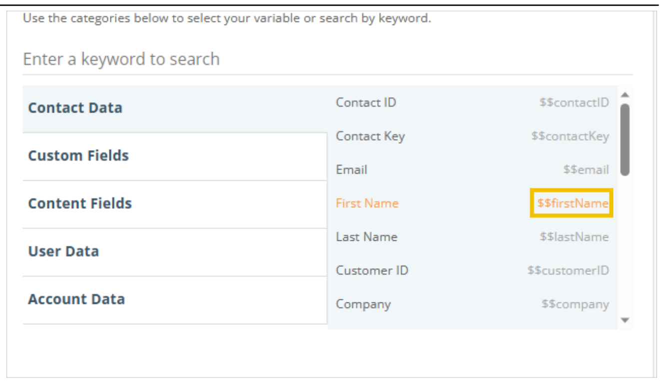
When using variables, you will insert the variable to the corresponding data point. Whatever is saved in that field is what will be inserted into the email.



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.

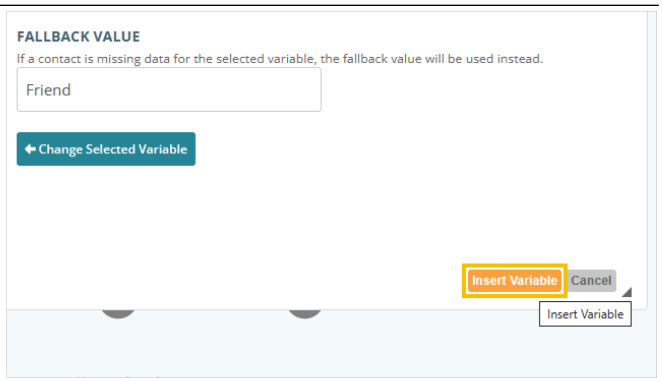


Find and choose the variable you want from the pop-up menu. In this example, we want to insert the contact's First Name. This is a standard field that can be found under Contact Data. Find and click **$$firstName**.

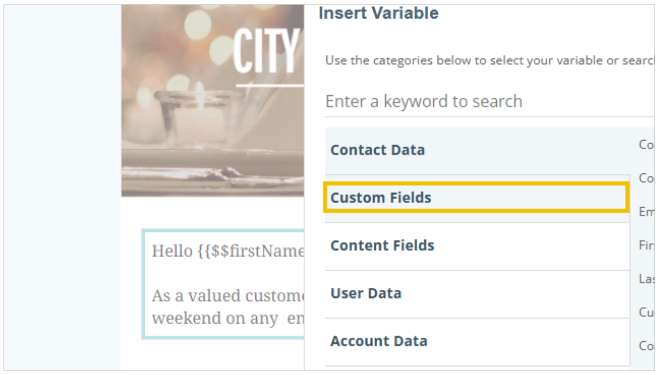


You will be prompted to choose a **Fallback Value**. If no value is saved in that field on a contact's record, in this example First Name is blank, the platform will use the **Fallback Value**. You are not required to use a Fallback Value. However, if you do not use a fallback, a blank entry will insert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

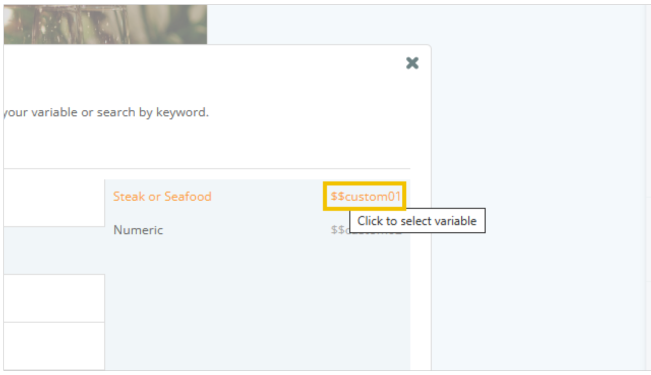
Type in your Fallback Value. Then, click **Insert Variable**.



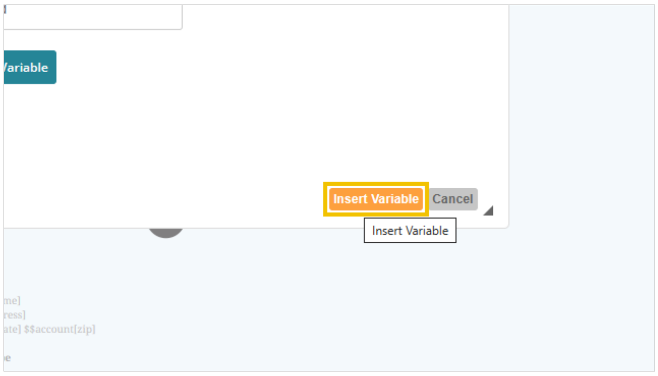
Custom Fields are located in the Options menu. These are non-standard data points created by members of your account to save specific data on the contact record. To use one as a variable, click on the menu for **Custom Fields** after clicking the Variable icon.



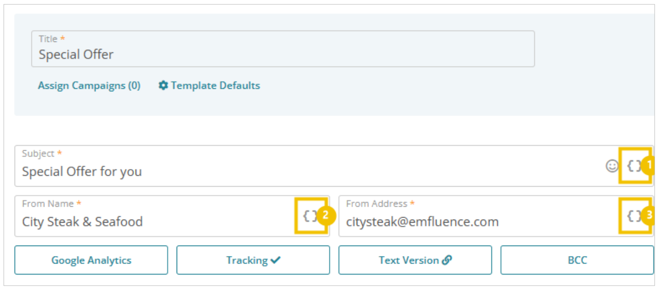
As with standard fields, the menu will show both the friendly name of the field and the variable ID. While standard fields have a variable ID similar to the name of the field, custom fields are simply numbered. To add your custom 1 field, find and click on **$$custom01**.



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

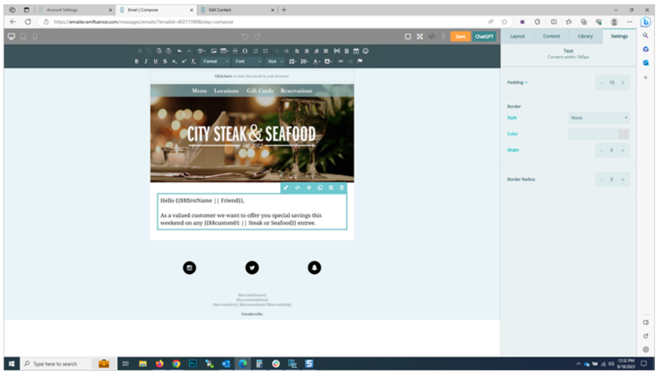


Variables can also be inserted into the Subject Line, the From Name and From Address of your email, and also the Reply To Name and Reply To Address of your email. Be careful of using variables for email addresses and make sure all recipients have a valid value on their records.



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.

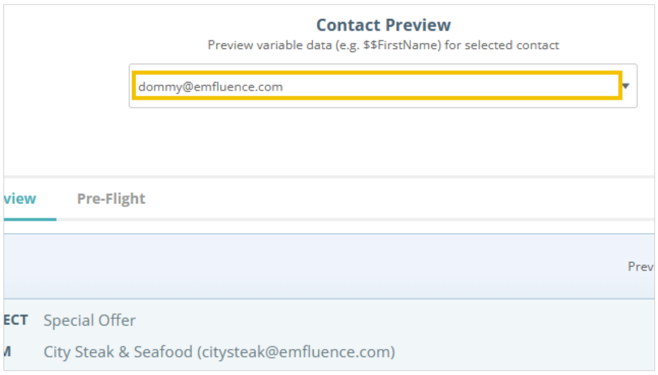
You will now see the variables inserted into your email. After saving, you can advance to the Preview step and check your contacts to confirm the values are correct.



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.

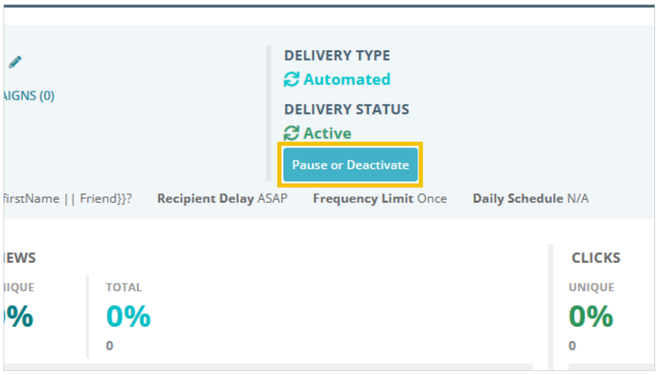
While previewing as another contact, you have the ability to send a proof of that email to yourself, another member of your team, or to a testing group.

Always test when using variable content.

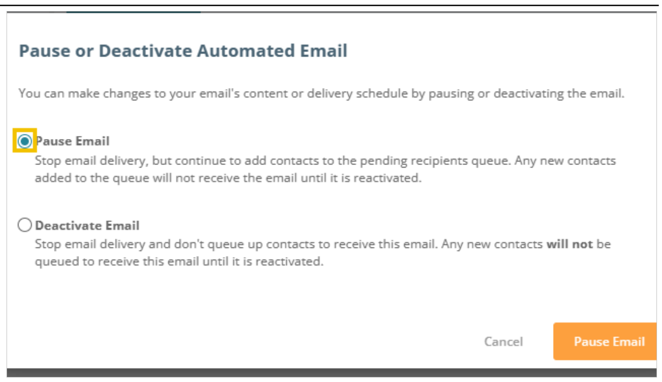


1.9. Pause & Deactivate Emails

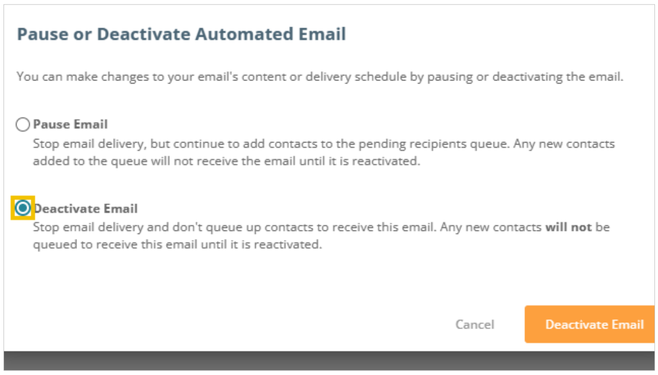
Active automated emails can be paused or deactivated by clicking on the button **Pause or Deactivate**



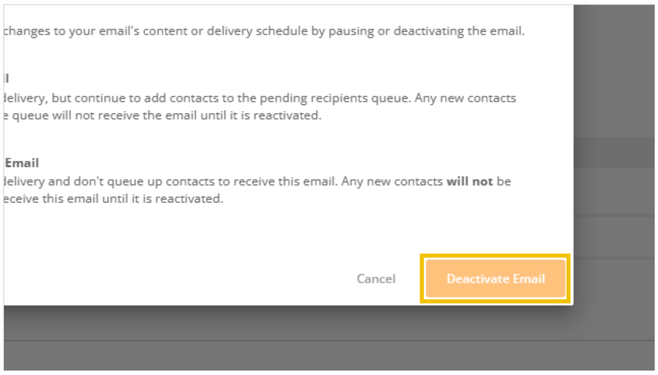
Choosing **Pause Email** will turn off the email but leave existing contacts in the email queue and continue to add contacts to that queue. Choose this option if you plan on making minor changes and reactivating and don't want anyone's progress in your workflow to stop.



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).

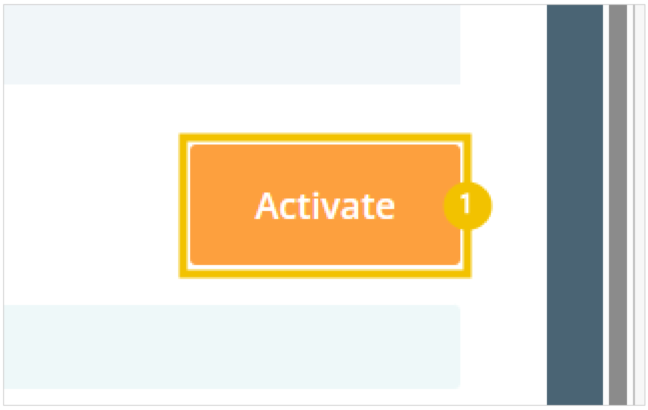


After making your choice, click on the button at the bottom of the modal to either **Pause Email** or **Deactivate Email**



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

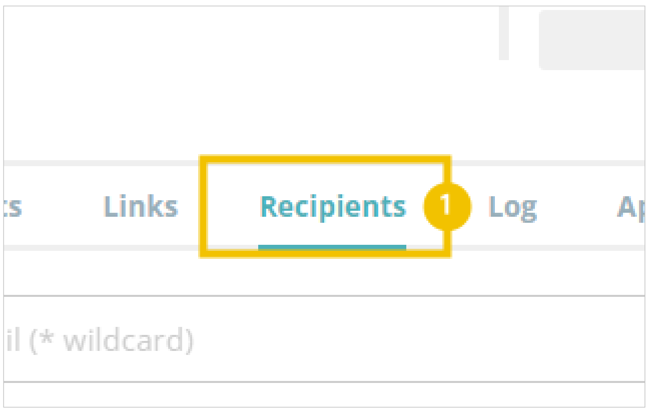
1. **Activate**: You can reactivate your email by clicking on the Activate button on the Send step.



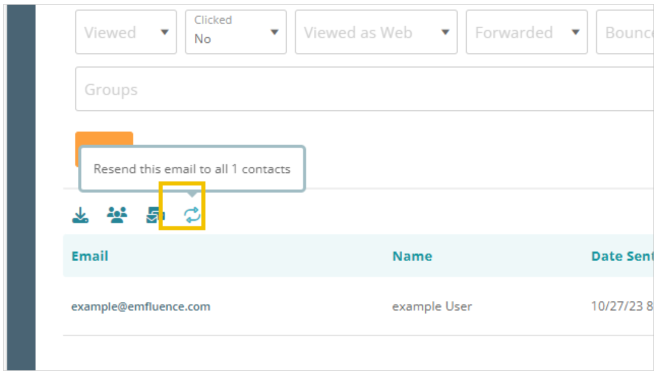
1.10.Resending an Email

You can always use the Copy button to make a new copy of your email. However, emfluence has streamlined a process if your goal is to resend an email to a group based on their activity in your original email (i.e. such as sending to non-openers or non-clickers).

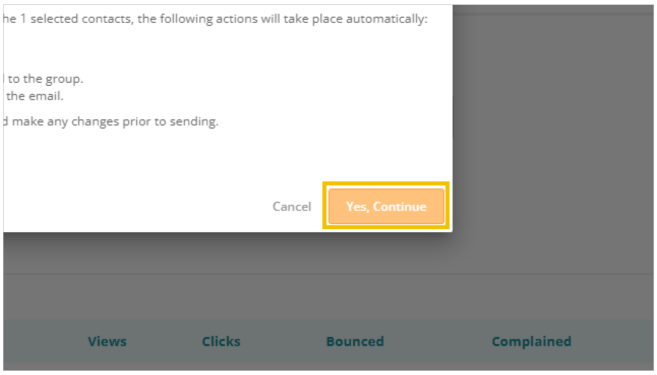
1. **Recipients**: Use the Recipients report to determine what group of people you would like to send the email to. This example uses non-clickers, but the criteria can be whatever you wish.



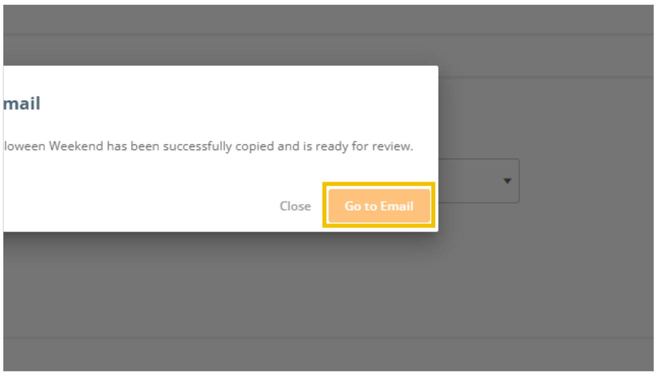
Above your search results, click the **Resend** button.



This will create a new group of those selected and create a copy of your email. Click on the button **Yes, Continue**.



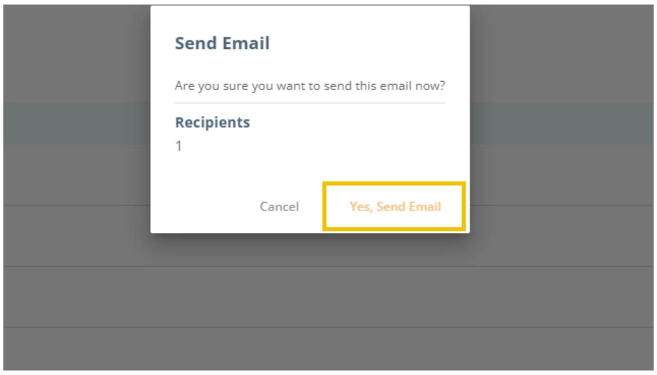
After the group and email have been created, click on the link **Go to Email** to schedule the email.



You will be delivered to the Send step of your new email with the group already attached. Make any changes as needed, and send.

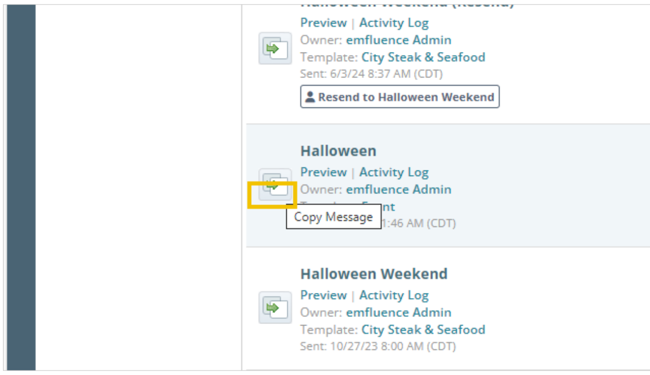
1. **Title**: The title of your original email will be used with "(Resend)" appended to the end of the title. If you wish, you can edit the title of the email.
2. **Compose**: If needed, you can return to the Compose step to edit your new copy.
3. **Delivery Options**: If you need to schedule your email, you can do this by returning to the Delivery Options step.
4. **Send Email**: When you are ready to send your email, click the Send/Schedule button.

As with any other email, you will be prompted to confirm your choice and click **Yes, Send Email**.

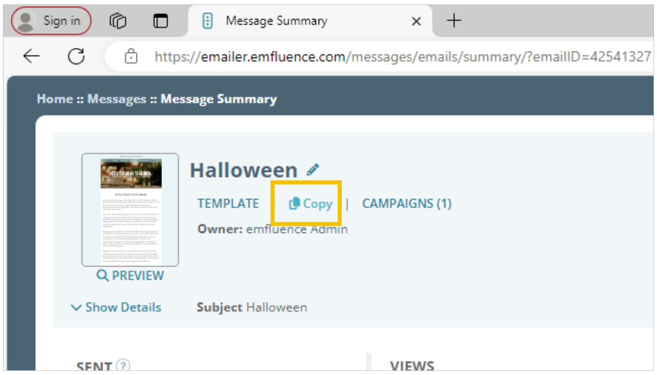


1.11.Copy an Email

You can copy any existing draft or sent email by clicking on the button to **Copy Message**.

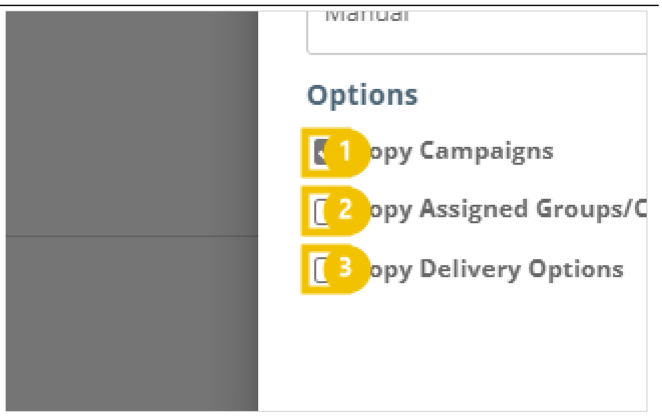


This option can also be found on the summary page of an email by clicking on the button **Copy**.

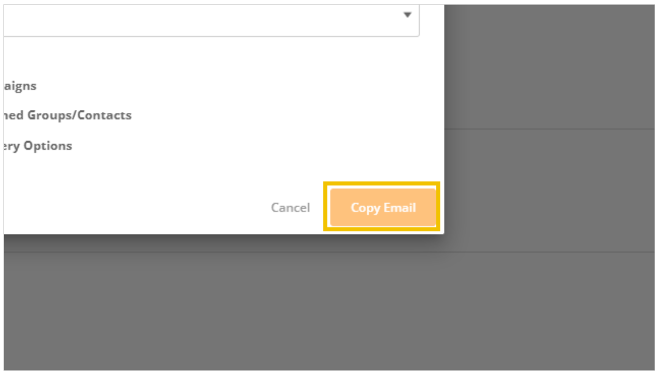


On hitting the Copy button, you will be offered an array of choices. You will be given the option to create a Manual or Automated version of your email (which will be defaulted based on the type of the original email).

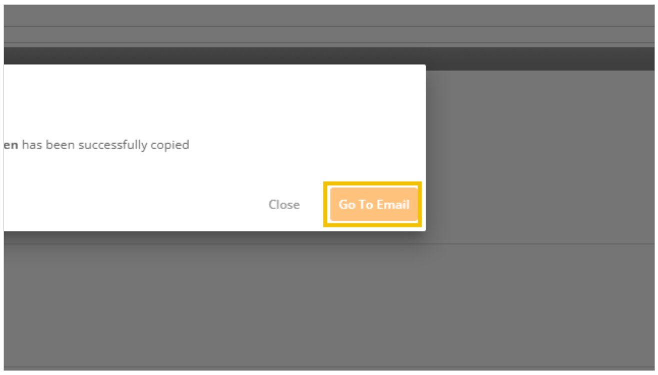
1. **Copy Campaigns**: You may choose to copy the Campaigns from the original email.
2. **Copy Assigned Groups/Contacts**: You may choose to copy the groups and contacts assigned to the original email.
3. **Copy Delivery Options**: You may choose to copy the options set up on the Delivery Options step from the original email.



After you have made your selections, click on the button **Copy Email**.



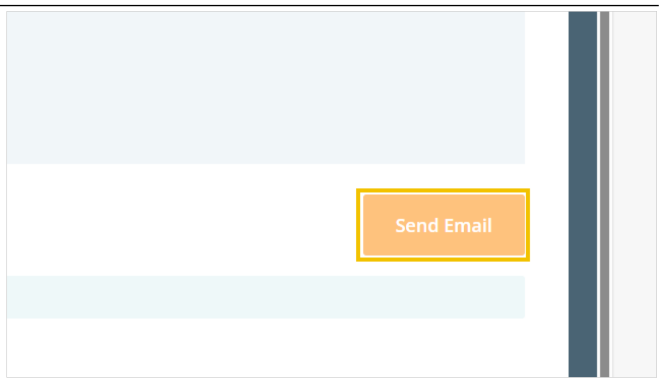
Your email now exists as a new email draft which will be found in your Drafts menu. To continue editing it from this screen, click on the link **Go To Email**.



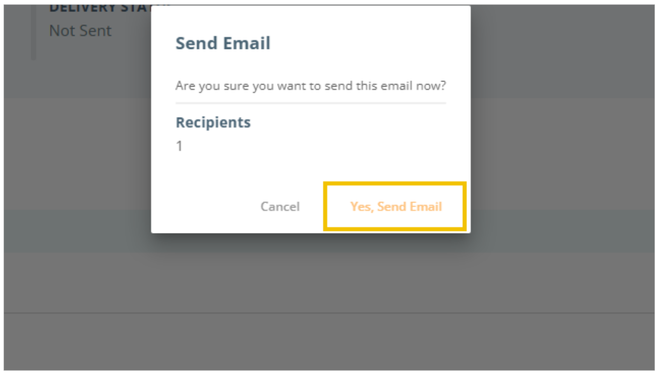
Make any changes you wish to your new copy and send.

1. **Title**: The new email will append the word "(Copy)" to the end of the title of the email. You can edit this if you wish.
2. **Compose**: If needed, you can return to the Compose step and edit your email.
3. **Recipients**: You can return to the Recipients step. If you copied recipients from the original email, and don't need to make any changes or additions, you do not need to return here.
4. **Delivery Options**: If you are scheduling your email in the future, you can do so by returning to the Delivery Options step.
5. **Send**: When finished, go to the Send step.

Click on the button **Send Email**.



Confirm your choices by clicking **Yes, Send Email**.

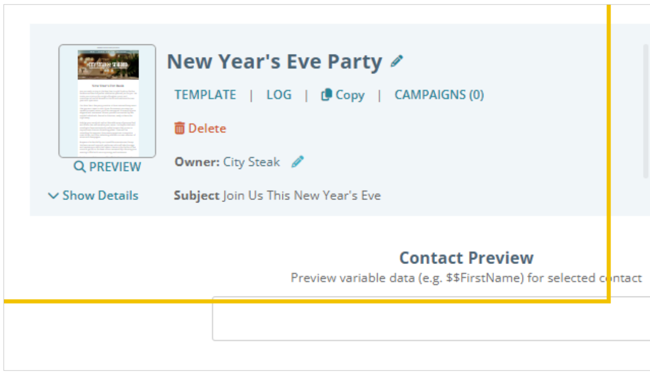


1.12.Changing Owner of an Email

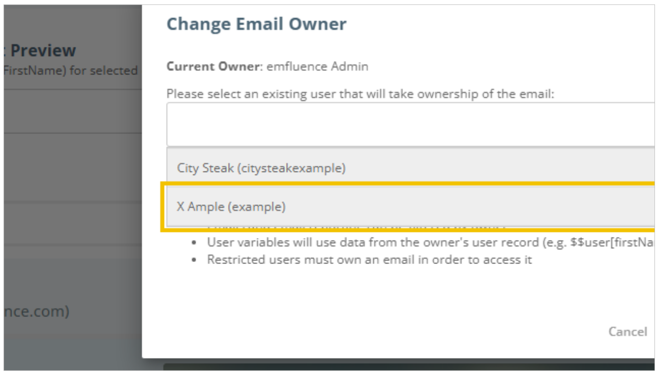
When you create an email, you are set as the owner of that email. Users with the Client Admin permission have the ability to change the owner allowing them to assign it to a separate user.

Understand that if you assign an email to a user lacking certain permissions that could affect what happens with the send.

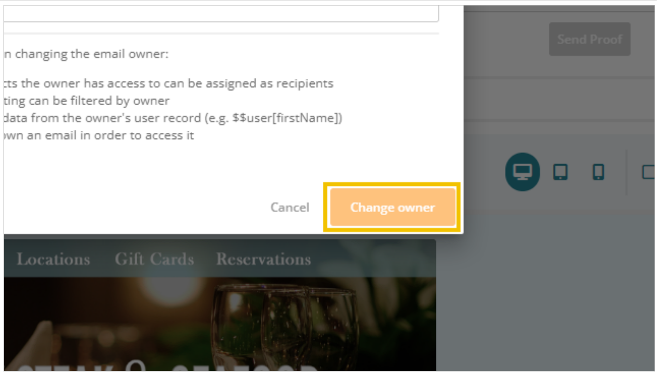
To begin, **click on the pencil** next to the assigned name of the owner.



From the dropdown menu, select the user you wish to become the new owner of the email. This user will **not** be notified this change has occurred.

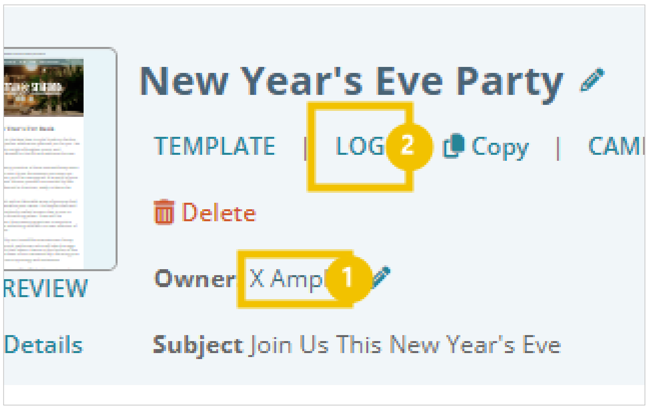


After paying attention to the warnings shown, click the button to **Change owner**.



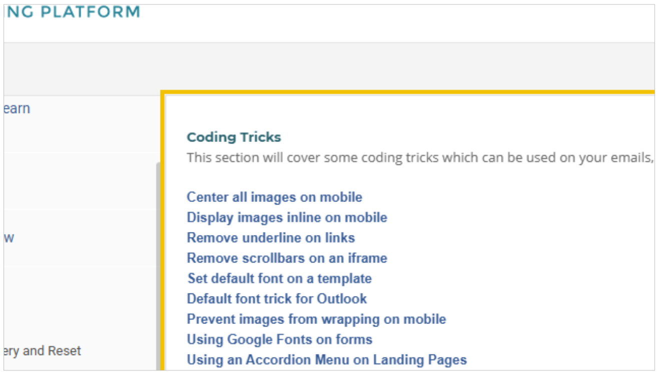
The new owner will now be shown. Double-check to make sure the change didn't adversely affect your send (e.g. the new owner doesn't have the Send permission or access to the template, group or contacts you want the email sent to, etc.).

1. **Owner**: After changing the owner the new owner will be saved on the email.
2. **LOG**: The change in ownership will be recorded on the log.



1.13. Email Coding Tips

The section provides coding tricks related to emails and email templates. The coding examples referred to in the section can be found in the emfluence Help Section: https://help.emailer.emfluence.com/coding-tricks



1.13.1. Create a Foreign Language Version of your Email

Using the View as Webpage Link in combination with code from Google Translate's web conversion tool (which you will need to get the proper variables for the language you wish to use), you can add a link to display your email in the browser in that foreign language.

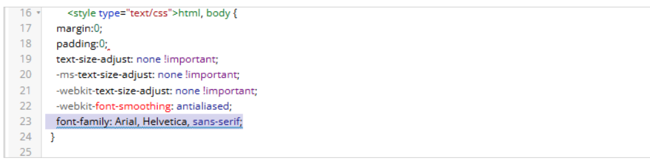
Use the link **https://emailer-emfluence-com.translate.goog/viewaswebpage/$$message[messageID]** followed by the specific code for the language Google provides.

Link to it in your template or email content just as you would any other link. For example, for Spanish your link would be **https://emailer-emfluence-com.translate.goog/viewaswebpage/$$message[messageID]?_x_tr_sl=en&_x_tr_tl=es&_x_tr_hl=en&_x_tr_pto=wapp**

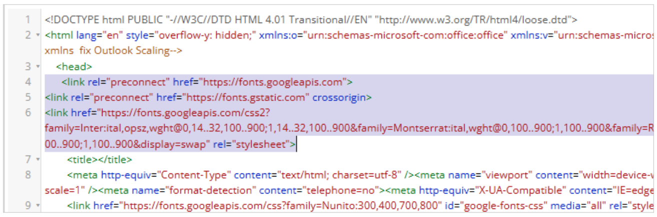
1.13.2. Text

1.13.2.1. Set a default font on your template

By adding a specific font family in the CSS of you template, you can set all text to use the font of your choice. When making a new email, new text sections added will also display in this font. NOTE: If you hard code a different font for any section that will overwrite this template default.

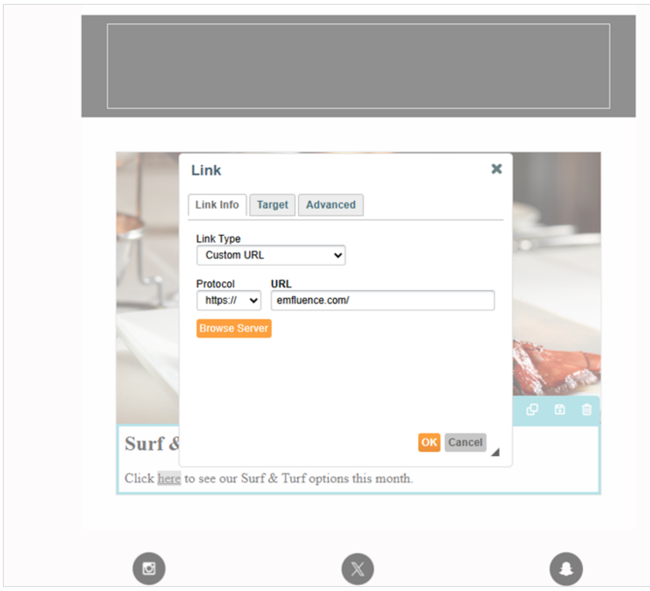


To use a Google Font, you will still add the font family as with any standard font. You will also need to add the embed code for that font (found on the Google Font website) inside the head section of your template. NOTE: Not all inboxes support Google Fonts. If a font isn't supported the text will fallback to the font family or the inbox default.



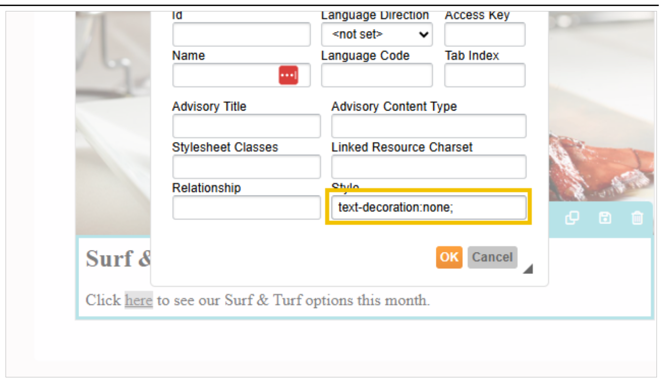
1.13.2.2. Remove underline from a link

When adding a link in a text element you can put in a piece of styling to remove the underline from the linked URL. After pasting or typing in the link, click on the Advanced tab.



Under **Style** add the code **text-decoration:none;** which will remove the underline from your linked text. You can also choose to change the link's color by adding a color values as well. For example, adding **color: #FFFF00; text-decoration: none;** would make your word yellow and also remove the underline.

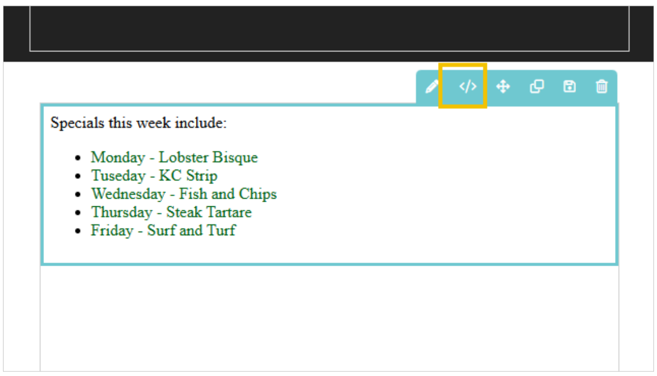
NOTE: This styling can also be used in template builder to remove underlines from other default links in your template.



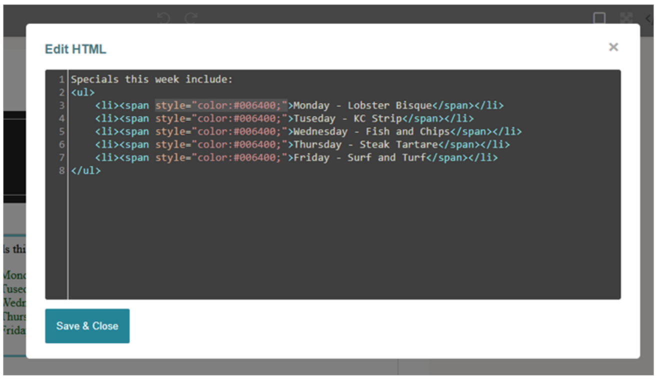
1.13.3. Change the color of a numbered or bulleted list

When editing the color of a bulleted or number list, you will note that the colors of the bullets or numbers do not change automatically and keep the default font. You can overwrite this with a simple line of code.

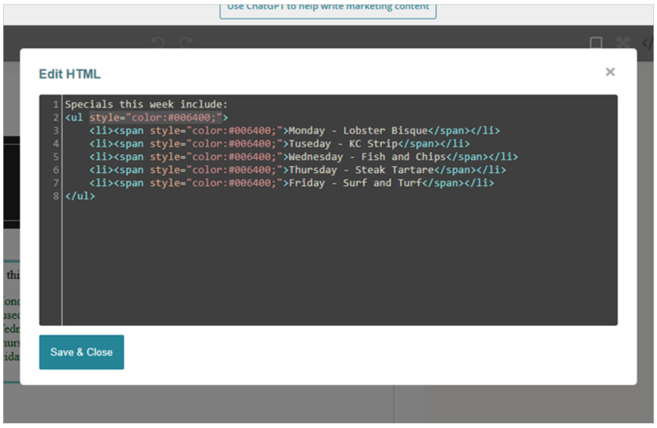
To edit, click on the **Edit HTML** button of the text element.



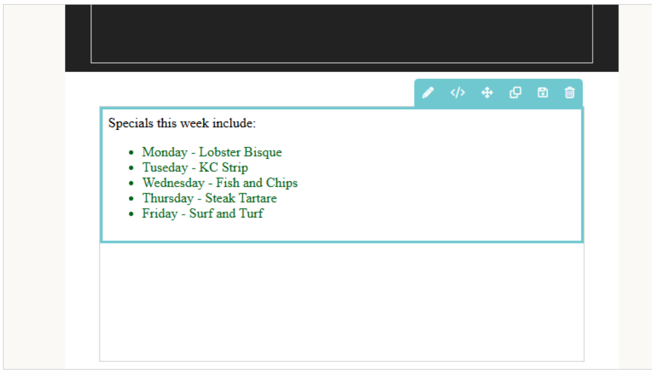
In the code view, you should see the color of the text within your list being applied to each individual line. Copy that code.



Apply that same code to the outer tag of the code and save.



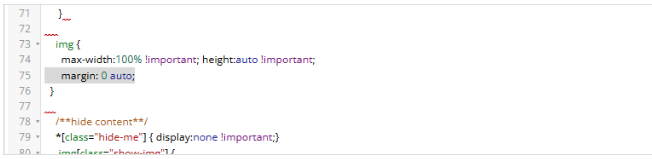
After saving, you should see the color now applied to the bullets or numbers.



1.13.4. Images

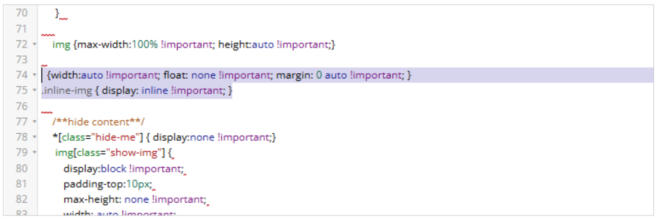
1.13.4.1. Center all images on mobile

To center all images in mobile on a template, in template builder, add margin: 0 auto; under the media query.



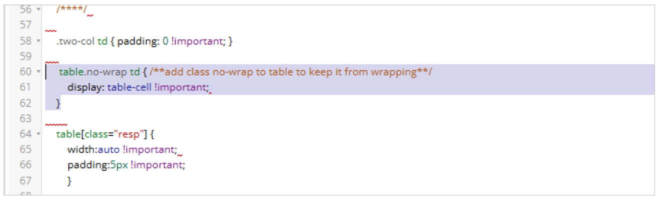
1.13.4.2. Display images inline on mobile

To display all images inline on mobile, add the following code to the head section of your template in template builder: {width:auto !important; float: none !important; margin: 0 auto !important; }



1.13.4.3. Prevent Images inside a table from wrapping

If your template includes the no-wrap styling in the head section CSS, this styling can be applied to any table in the template to prevent that table from wrapping on mobile. NOTE: In order to work content must be in separate fields of the table.



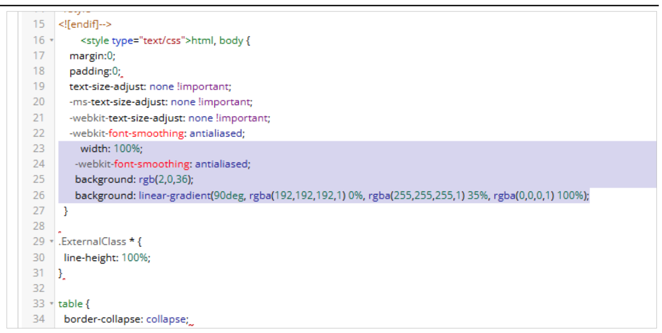
Simply apply the no-wrap class to any table in your template to prevent wrapping.

1.13.5. Template Background Color

Email templates are a series of tables within tables. To set a background color on the outside of your template, simply add the color to the outer-most table such as bgcolor="#f16816"

By adding some CSS to the body tag of your template you can apply a gradient background color to your email. NOTE #1: If your template has a background color already in place, it will need to be removed. NOTE #2: This applies only to some Apple devices and will not work on most PC and Android devices.

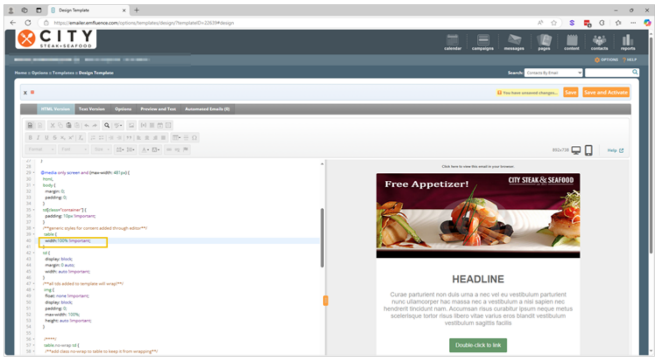
To add the gradient you will add code in the body tag in the template's CSS including a linear gradient using multiple colors to create the gradient.



1.13.6. Buttons

To force buttons to center on mobile, you can add **max-width: 100% !important;** under the mobile media table property of your CSS located in the head section of your template.

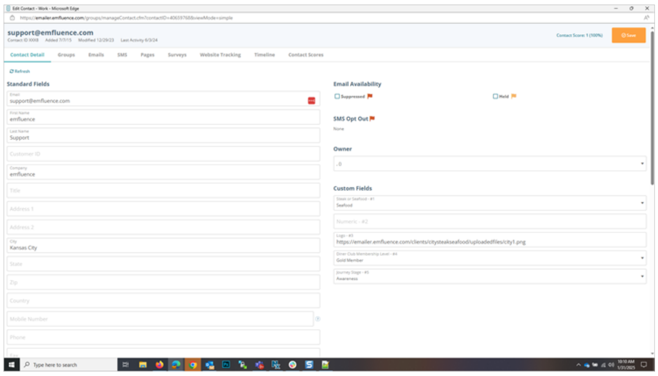
NOTE: Make sure you are editing under the responsive media only section. If your template has width: auto !important; already in the template, replace it with this separate code.



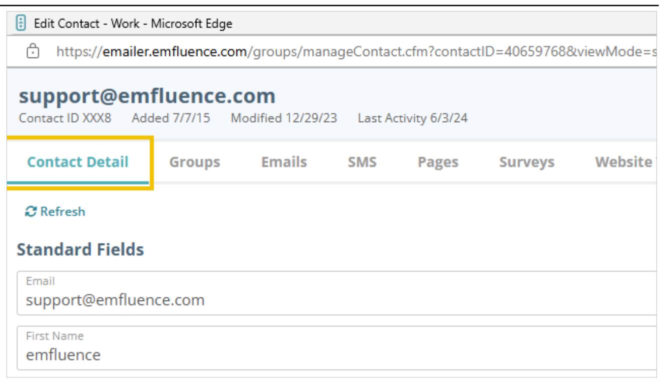
2. Contacts

2.1. Contact Record

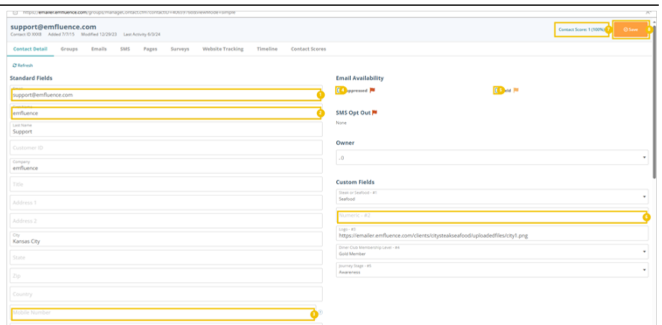
Every contact added to the emfluence Platform will have their own contact record complete with the data saved to that record and recorded activities of that record. If for any reason a contact is deleted, that data will be permanently deleted and re-adding the same email address into emfluence would create a new, unconnected, record.



Contact Detail includes the data points saved on the contact record including standard fields (first name, last name, email, etc.) and any custom fields. These fields can be edited individually on the record, or would update on an import, form entry, API call, etc. where new data will overwrite previously saved data.



Information on the Contact Detail page can be viewed or edited. If you make changes, remember to save.

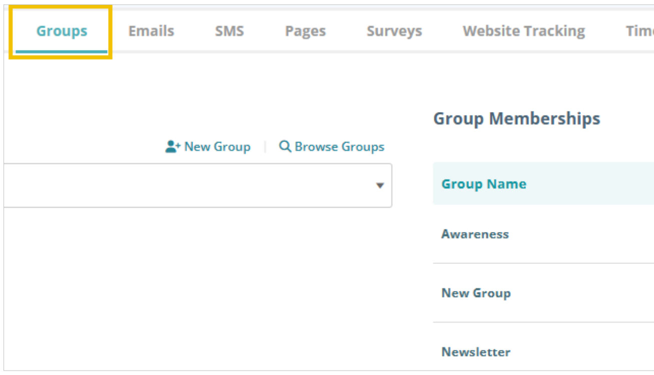


1. **Email**: Email is the standard field that must have valid data in order to save a contact. We cannot save a contact without an email address and only 1 contact can be saved with any email address (duplicates are not allowed).
2. **First Name**: Other standard fields such as First Name, Last Name, etc. can be filled in with contact data you may use for querying purposes or to use as variable data in your emails.
3. **Mobile Number**: If you are using SMS, mobile number allows you to save the cell

number of your contact. As with email, mobile number must be distinct. Two contacts cannot share the same mobile number.

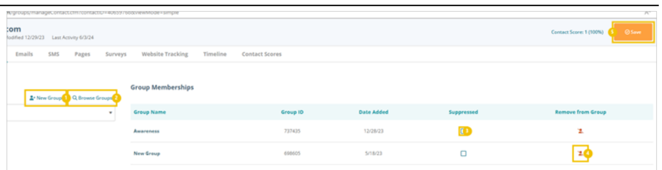
4. **Suppressed**: If a contact is suppressed, this box will be checked along with a date and time the suppression occurred.
5. **Held**: If a contact is held, this box will be checked along with a date and time the hold occurred.
6. **Custom Fields**: Custom Fields are columns created in your account that data can be written to. The value for each custom field on a contact is shown on their record.
7. **Contact Score**: The contact's current contact score is shown here. If your account has more than 1 contact score, the primary score is shown.
8. **Save**: If you make any changes to the record, make sure to save.

The **Groups** tab shows all groups the contact has been added to.

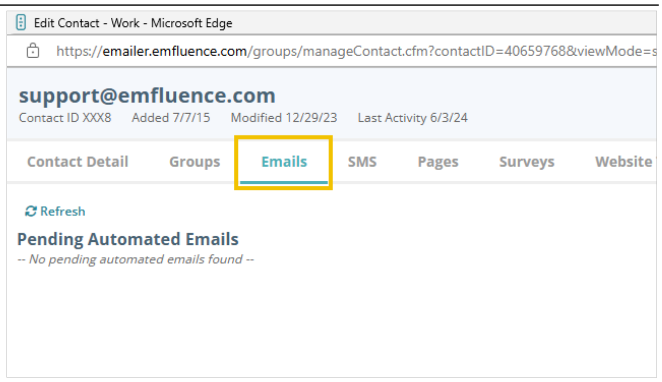


Groups

1. **New Group**: Create a new group to add this contact to.
2. **Browse Groups**: Browse all groups and add your contact to multiple groups at once.
3. **Group-Level Suppression**: A contact can become group-level suppressed by opting out of a group on the Unsubscribe Page (or an emfluence form).
4. **Remove From Group**: Click to remove the contact from this group. Contacts can also be removed from groups in bulk via the contact import.
5. **Save**: Remember to save any changes to the contact's group memberships.

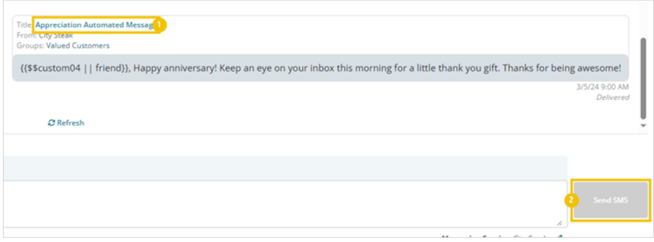


Emails shows all emails the contact has received with notations on whether the contact viewed, clicked, bounced, unsubscribed, or made a spam complaint on any email. NOTE: Gmail does not provide individual spam complaint data. A Gmail address who complains will not show up on reporting.



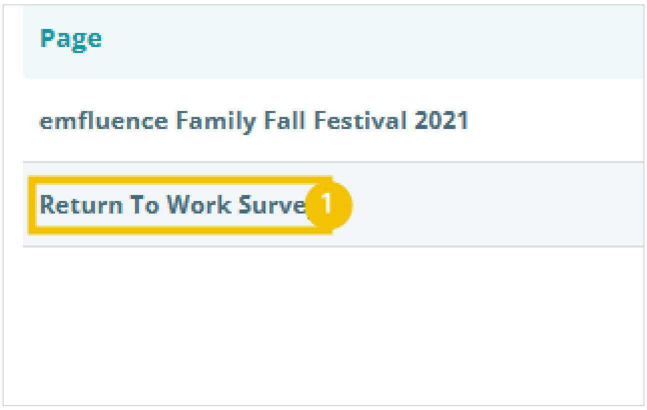
If SMS is active in the account, and this contact has been sent SMS messages, you will see those messages (and any responses they have texted back) on the SMS tab. This information can also be found in SMS reporting.

1. **Title**: Previous messages sent will be shown with the newest messages at the bottom of the page. Clicking on the title of a message will take you to that message reporting.
2. **Send SMS**: On the contact record, you have the ability to send an individual contact a message through the form at the bottom of the tab. Click Send SMS to send the message.



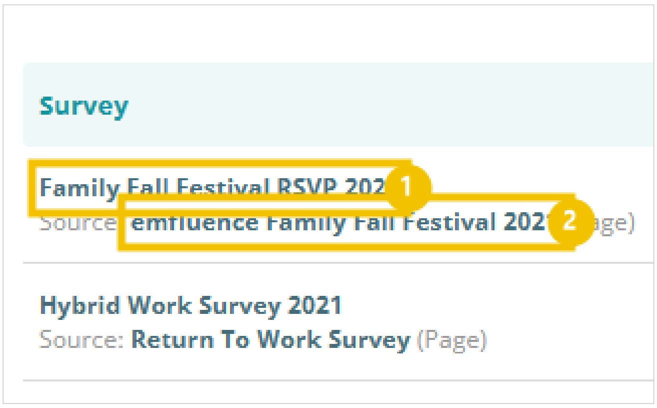
Landing Pages

1. **Pages**: Pages the contact has visited will be shown here including the last date for the visit, the number of visits for the page, and whether they clicked or converted on the page. A conversion notes a form entry.

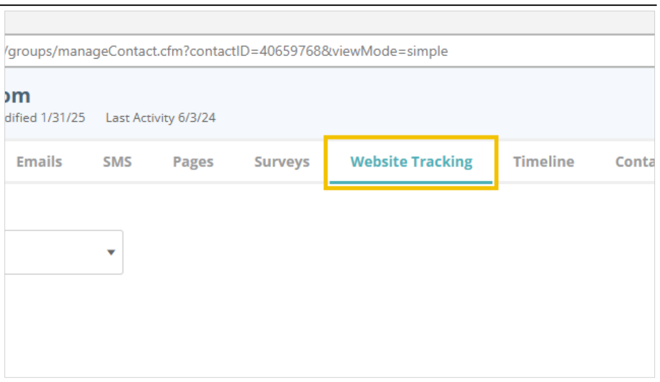


Surveys

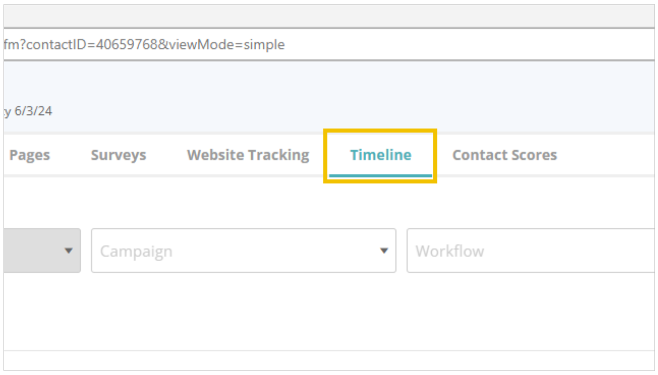
1. **Surveys**: Previously taken surveys are shown here with information on when the survey was started (meaning at least 1 page of the survey was saved) and when it was completed (the submission at the end of the survey was completed).
2. **Landing Page**: If the survey was put on a landing page, a reference to the page is included here.



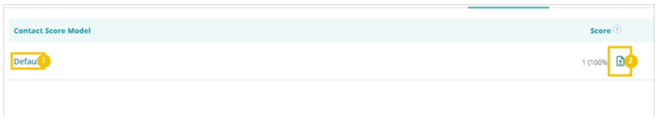
If **Website Tracking** is set up in your account, and a cookie has been saved on the contact's browser, data tied to your website will be show here for pages visited by the contact.



Timeline puts all activity of a contact on a single timeline with the newest actions showing at the top.



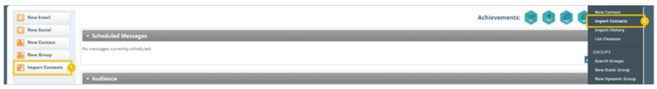
Contact Scores



1. **Contact Score Models**: Each contact score model will be shown here with the contact's score shown to the right.
2. **Manually Update Score**: If you choose, you can manually edit a contact's score by clicking here to increase or decrease the score based on some action outside of the platform (for example: phone call or personal meeting).

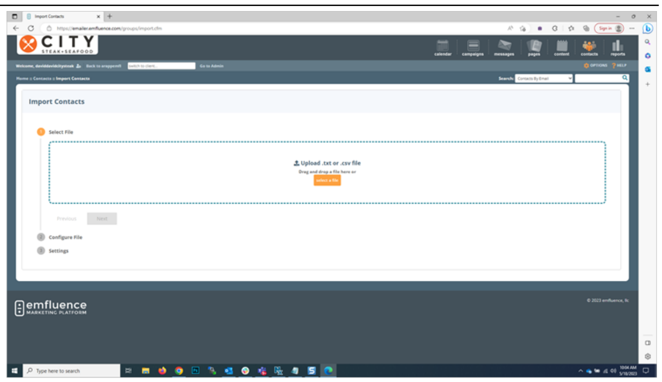
2.2. Import Contacts

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.

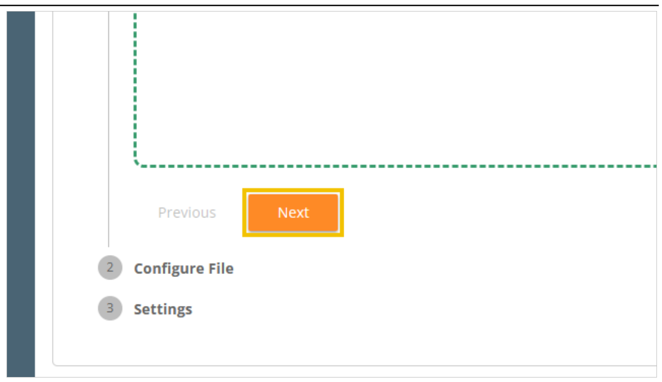


1. **Import Contacts**: Advances you to the import file menu.
2. **Import Contacts**: Advances you to the import file menu.

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.

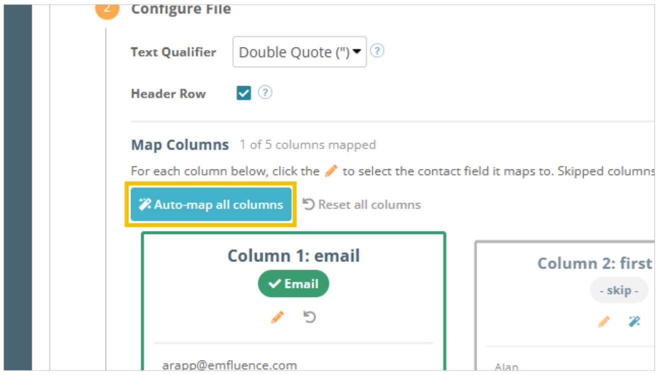


After adding your file, make sure the file type is accepted and click **Next**.

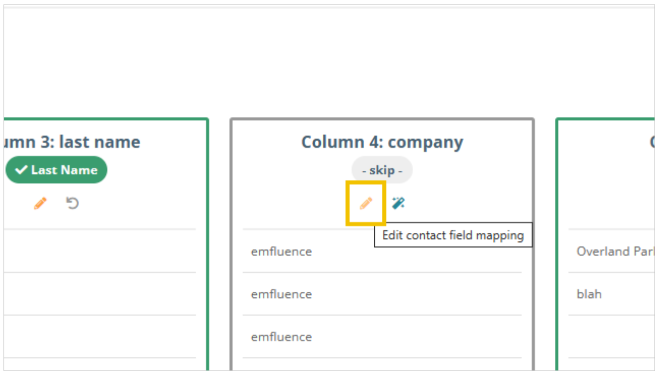


If your file contains a row with column names which match values in emfluence, you can click **Auto-map all columns**. Email must be one of the fields mapped.

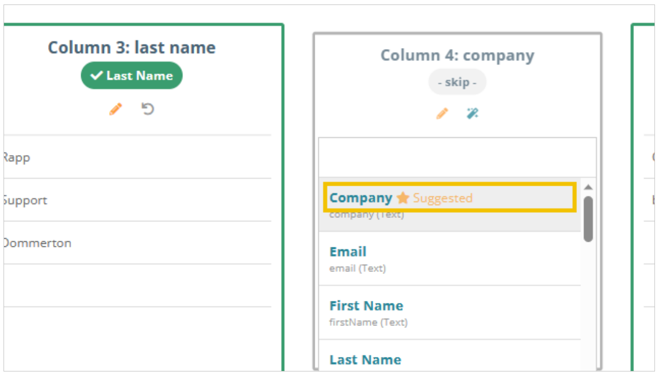
NOTE: Only columns mapped will be imported. Any data in columns not mapped will be thrown out in the import process.



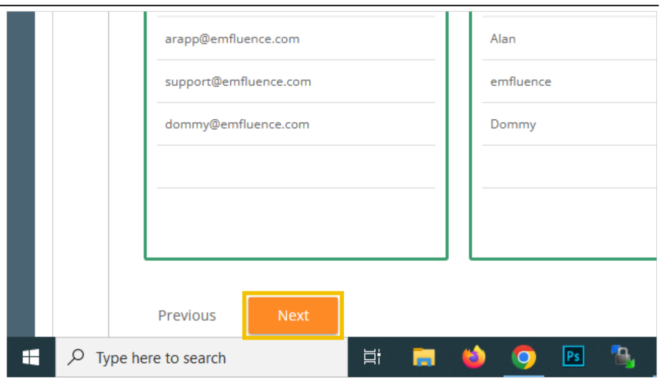
Any columns not mapped, you can manually map by clicking the pencil to **Edit contact field mapping**.



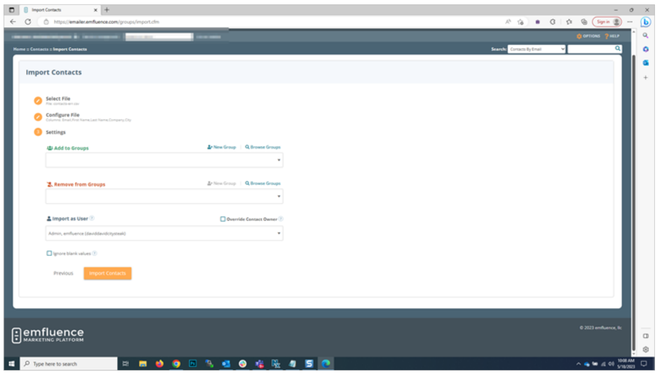
Manually choose the correct field in the dropdown. Make sure you are mapping data of the same type (text to text, date to date, etc.). Data that doesn't match in a single field can cause an entire row of data to fail.



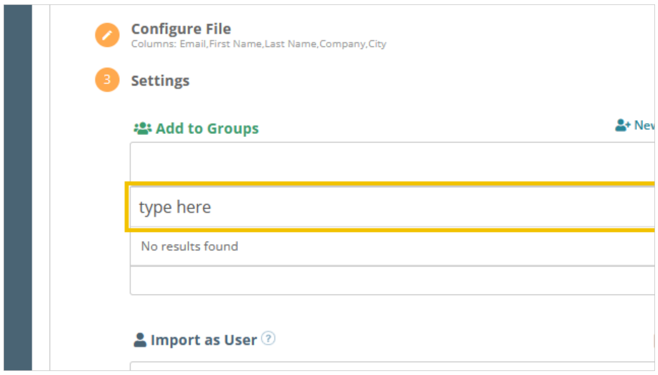
After your mapping is finished, click **Next**.



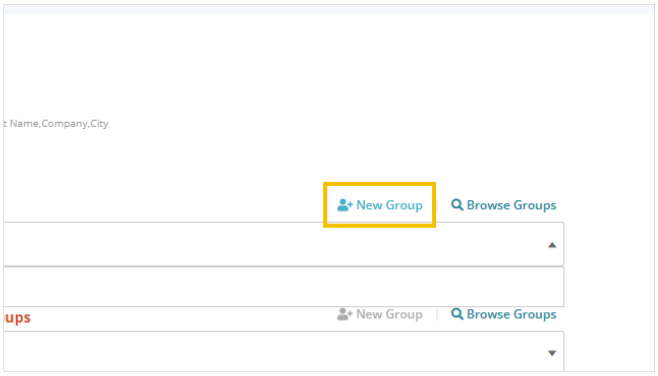
On the Group step, choose which groups to import contacts. You can import into existing groups or choose to create a new group.



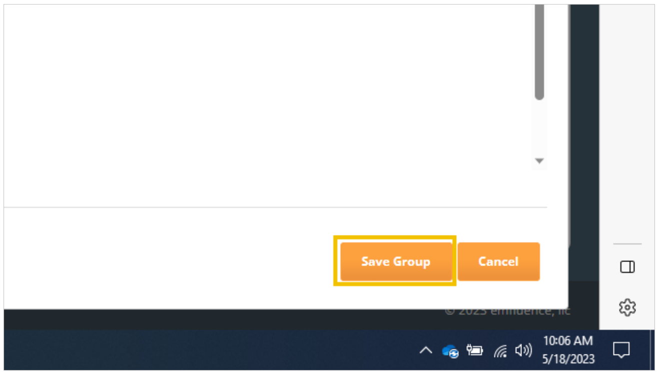
To add contacts to an existing group you can either click the **Browse Groups** option, and select the groups from your existing list, or start typing the name of the group in the **Enter Group Name** field and select the correct group from the results. You can import to multiple groups.



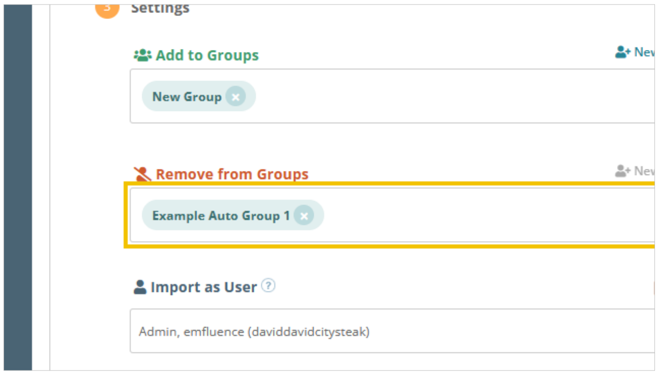
If there isn't a preexisting group, you can create a new group by clicking **New Group**.



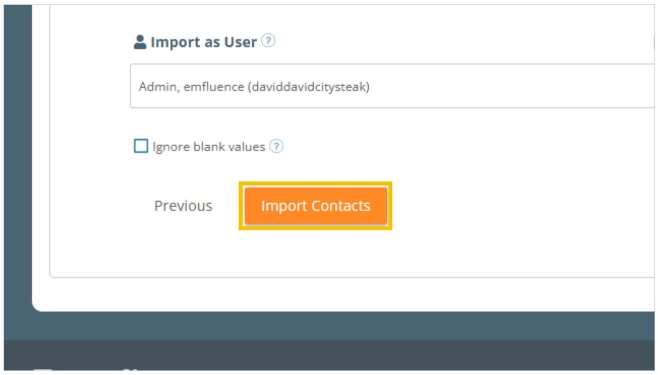
After filling out the name of your group and setting preferences click on **Save Group**.



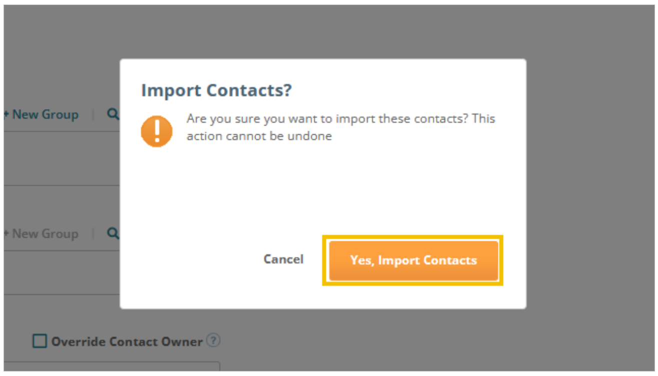
Optionally, you can use the **Remove from Groups** feature to use an import to pull contacts out of a group in bulk.



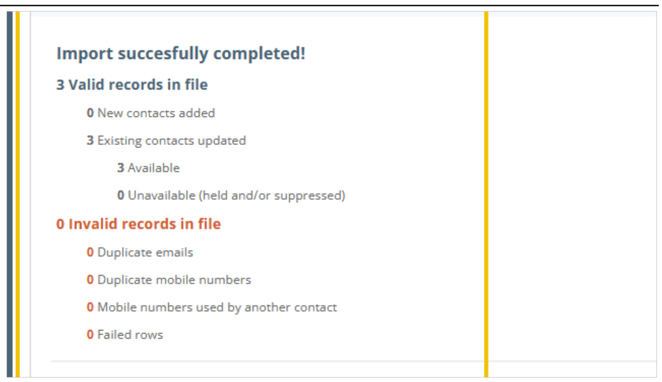
After selecting your groups, click **Import Contacts**.



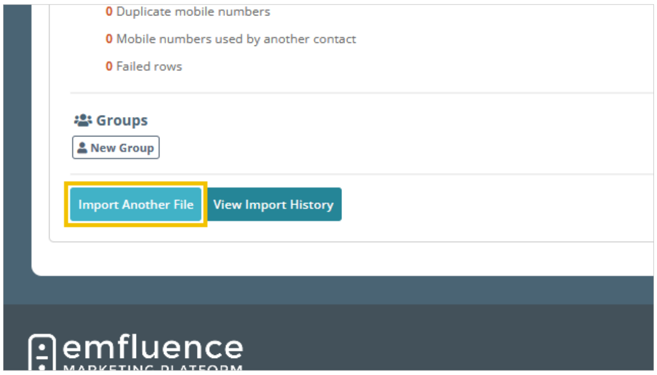
Since you cannot stop an import in process, you will be asked to confirm your option to import. Click **Yes, Import Contacts**.



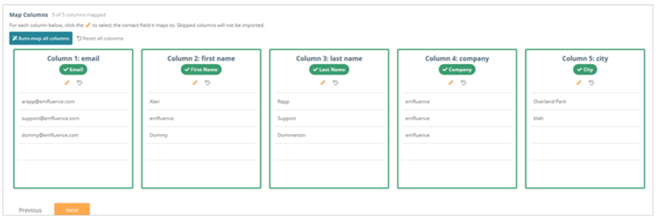
The **Import History** page will offer a summary of your import including number of new contacts added, number of existing contacts updated, what groups contacts were added to and any failed rows in your file. This information can be found later by searching previous imports in the Import History link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

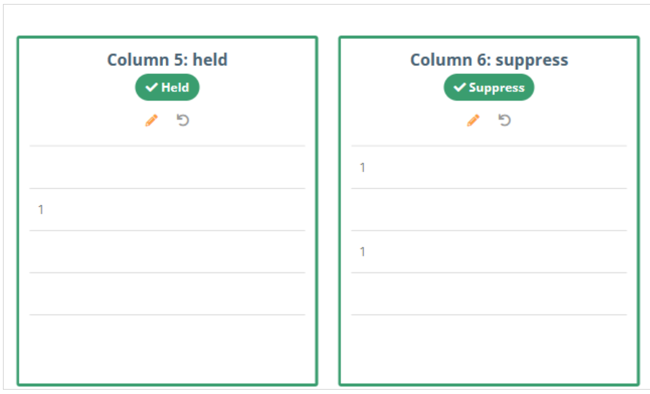


If you choose to import another file, and your file has the same number of columns in the same order, the import will remember your mapping. However, this only occurs when utilizing the Import Another File option.

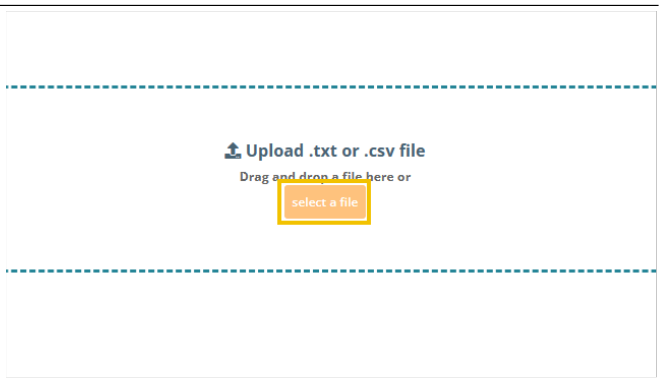


2.3. Import as Held or Suppressed

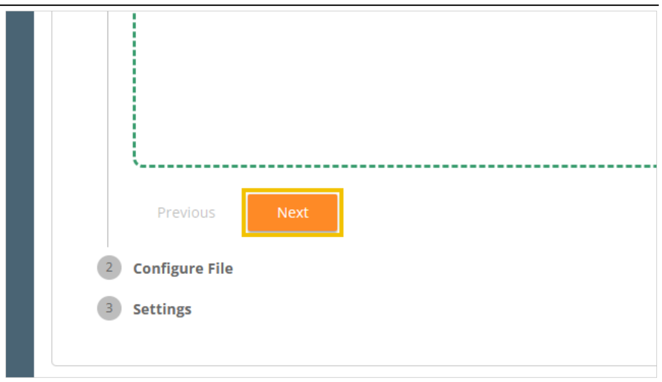
If you have a list of contacts you wish to add to your account and also prevent them from being sent to in the future (to avoid them getting added later on as an available contact) you can upload them as Held or Suppressed



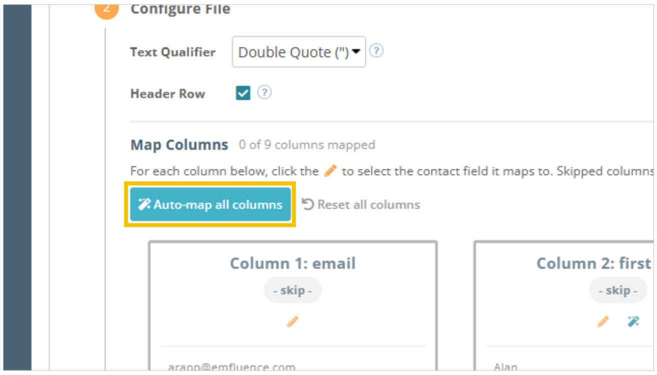
Upload as normally by clicking on the button **select a file**



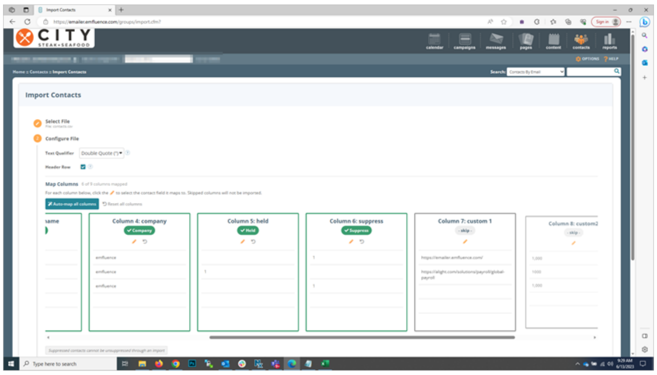
After choosing your file, click on the button **Next**



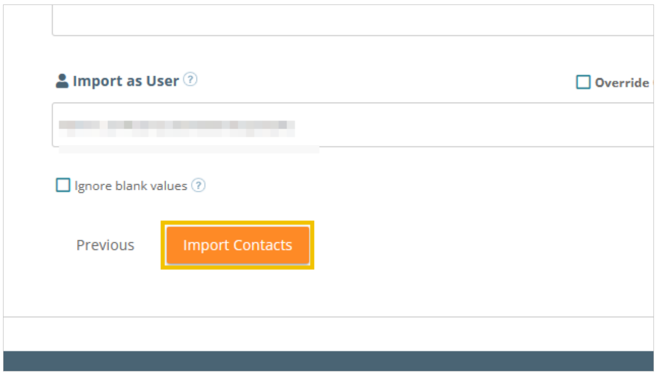
Map your columns. If you have included headers in your file, you can attempt to auto-map them by clicking on the button **Auto-map all columns**



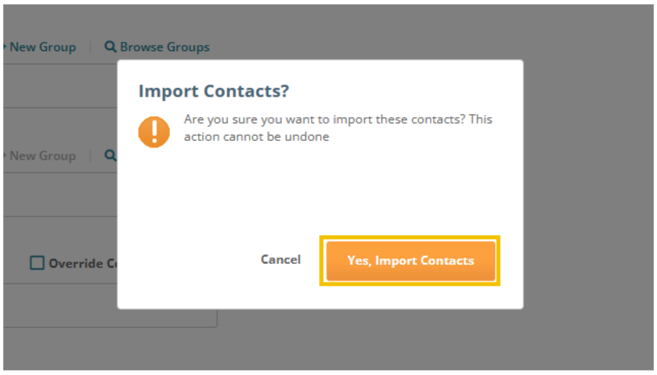
Any columns not mapped, can be mapped manually by clicking on the pencil under that column. If you have included a column for Held, any contacts with a value of 1 will be uploaded as held. If you have included a column of Suppress, any contacts with a value of 1 will be uploaded as suppressed



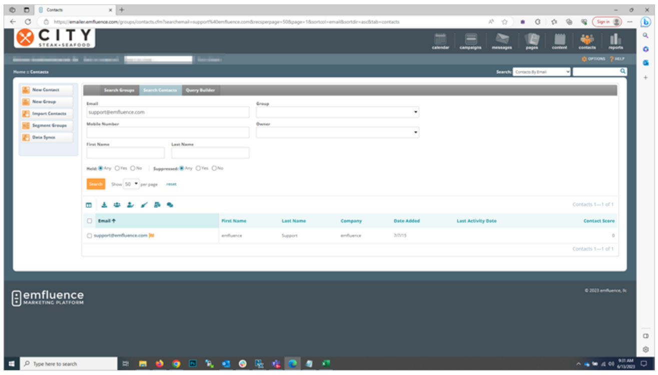
Click on the button **Import Contacts**



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

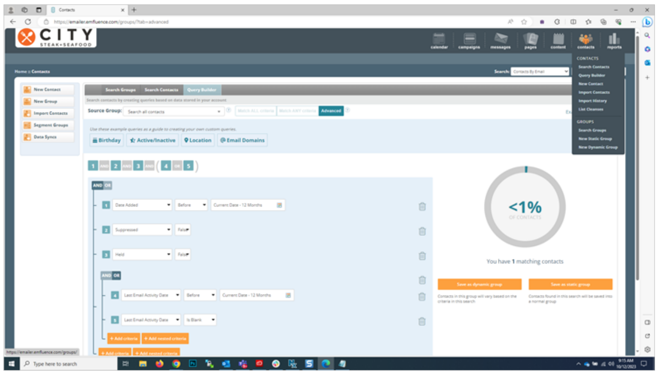


If you search for a contact, you should see the appropriate flag listed on their record



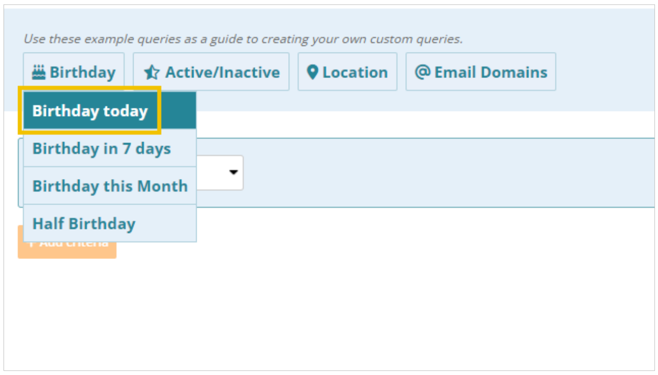
2.4. Query Builder

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.



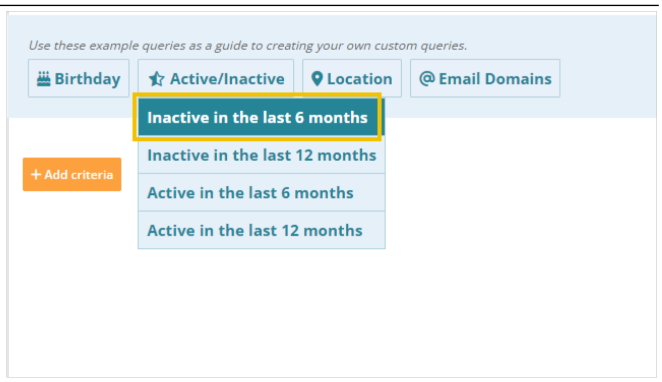
emfluence provides several example queries to get you started. The **Birthday** queries include **Birthday today**, **Birthday in 7 days**, **Birthday this Month**, and **Half-Birthday**.

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).



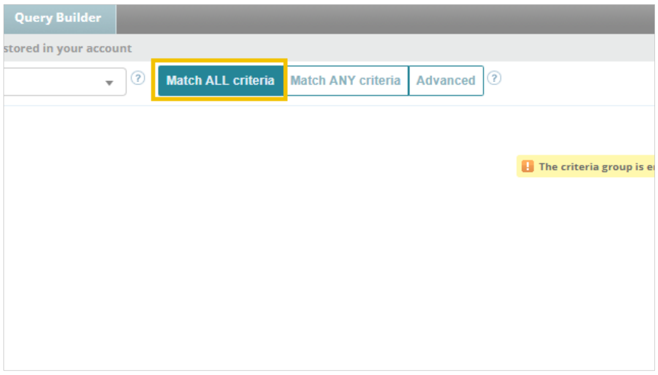
Another set of example queries involve the activity or inactivity of your contacts over 6 or 12 months. Here you can find lists of your active and inactive contacts.

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).



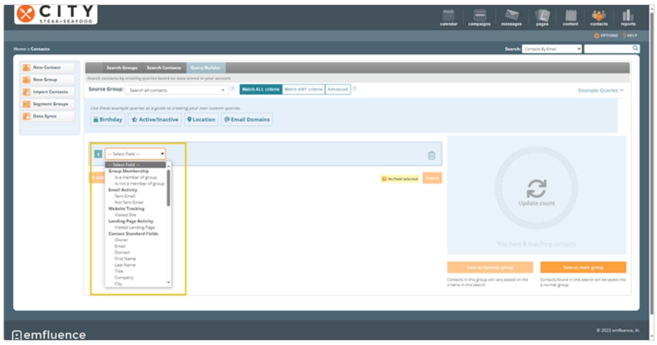
When making queries, you can choose the logic you want your search to follow.

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.

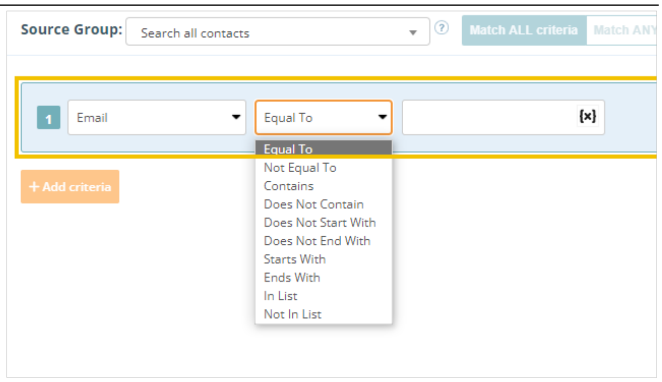


To create your own query from scratch, click on **Add criteria** and choose a field from the Select Field dropdown. Fields available will include all standard and custom fields, group membership, website tracking, and also landing page and email activity.

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.

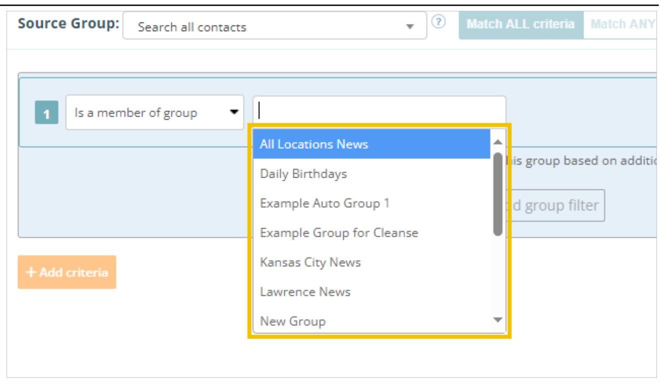


When choosing **Is a member of a group** or **Is not a member of a group**, you can select the group in question from the dropdown.

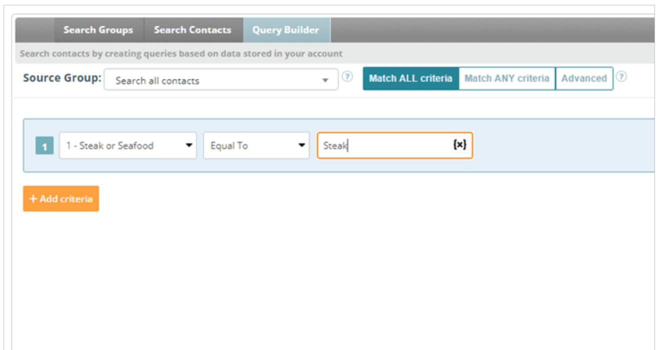
When choose **Sent Email** or **Not Sent Email**, you can select the email in question from the dropdown.

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

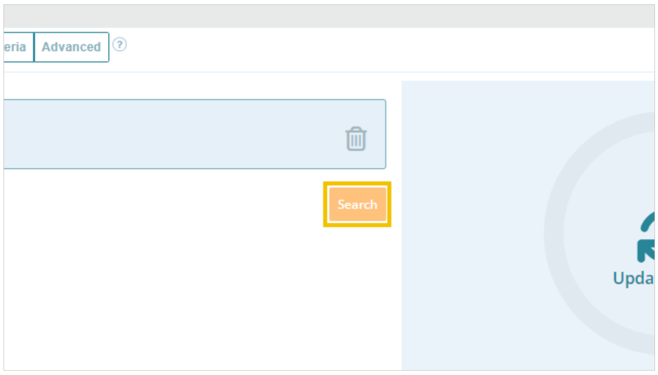
When choosing **Website Tracking**, select the domain previously connected and then the page in question.



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

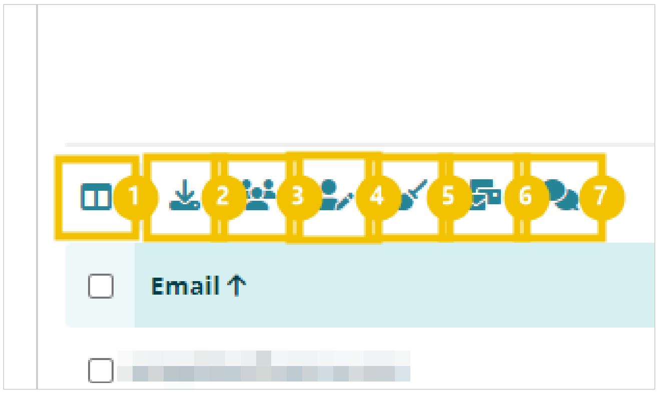


Click on **Search** to see your results loaded at the bottom of the page.



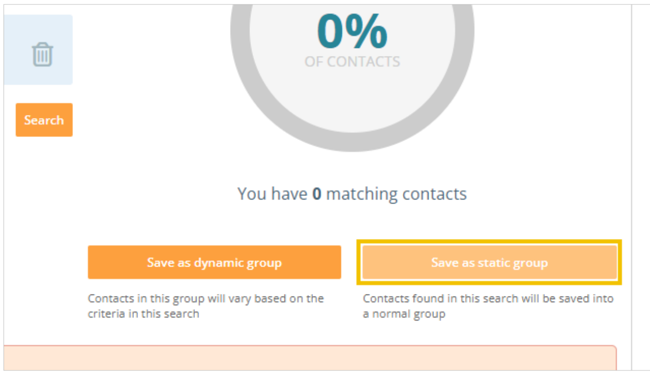
You can use the menu just above your results to take action on these contacts.

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.



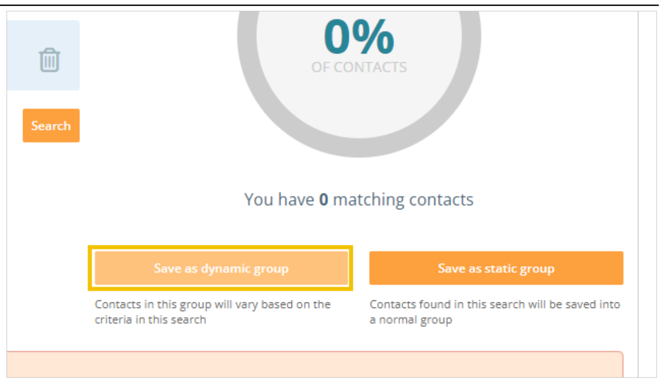
If you want to save your search results for later action, you have a couple of options. Clicking **Save as static group** will save the current list of contacts you see below (meaning the contacts who matched your query when you originally ran it).

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.

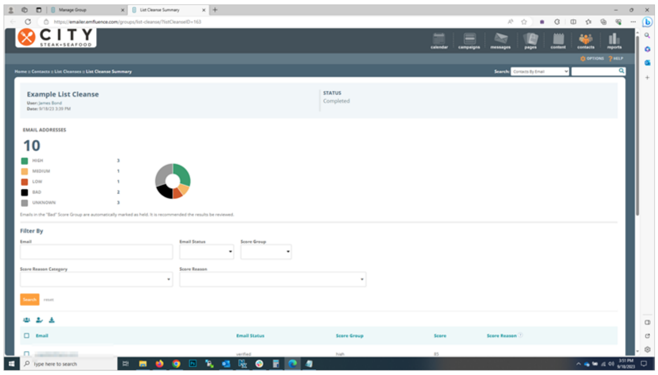


If you need to save your list for a one-time send, pick a static group. If you are planning to use this group ongoing, possibly tying it to a birthday or repermission workflow which you want contacts to get included on automatically, then in that case you would want to save a dynamic group.

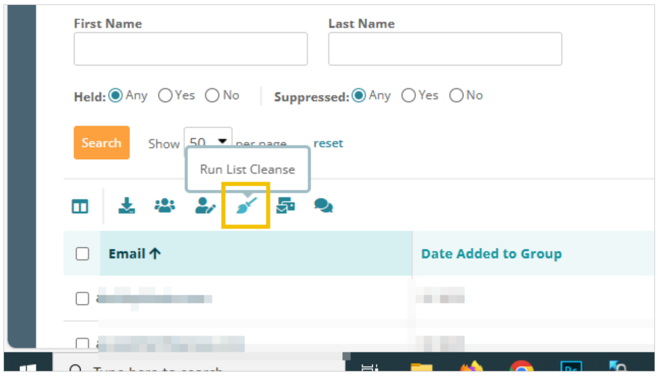
Reminder: You can never manually add someone to a dynamic group. The closest you could come would be to change their contact information to match the query criteria.

2.5. List Cleanse

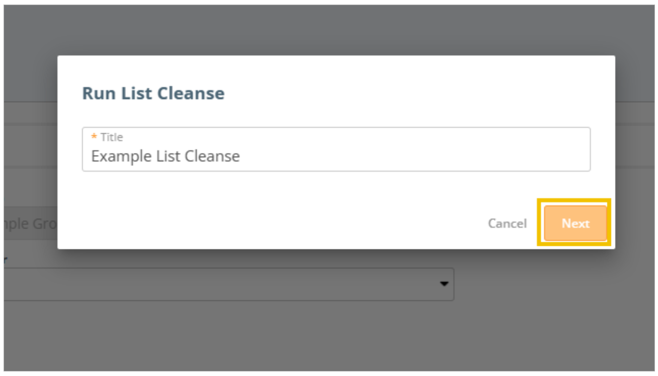
Through the use of a third-party service, you can cleanse a list of addresses to weed out bad and/or dangerous email addresses from your sends. emfluence suggests cleansing any older lists prior to sending, and doing a regular cleanse of your entire list once or twice a year.



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.

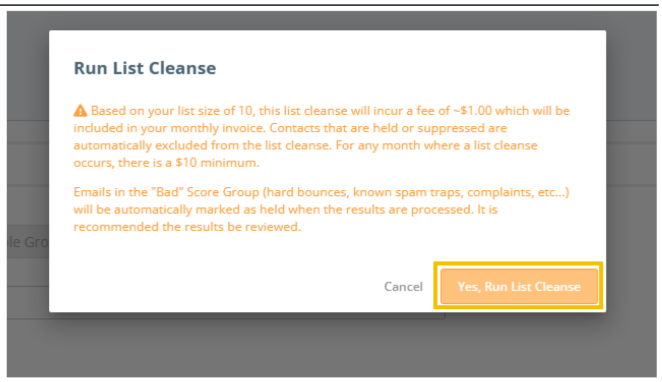


Give your cleanse a title. This not only will help tie the cost of the cleanse to a specific list but will also allow you to differentiate different lists that you have cleansed. Click on **Next**.



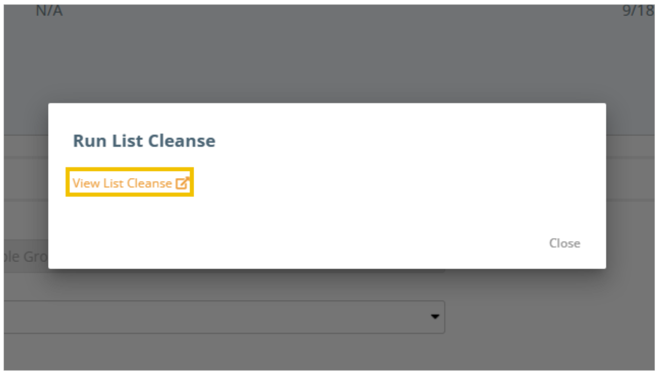
Based on the available count of your list (those contacts neither held nor suppressed), an estimated cost will be shown. To move forward with the list, click on the button **Yes, Run List Cleanse**. If you decide to not run the list, click the Cancel button.

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.

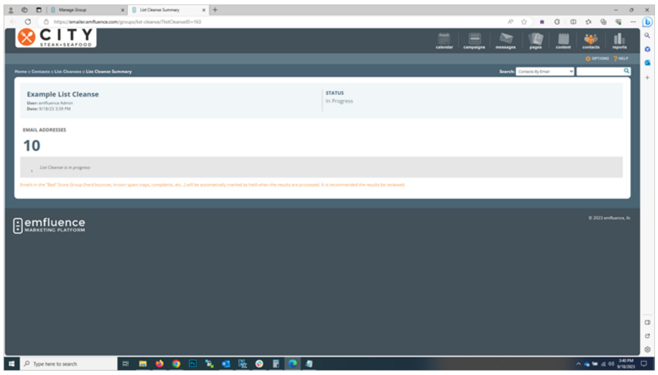


To view your results, click on **View List Cleanse**.

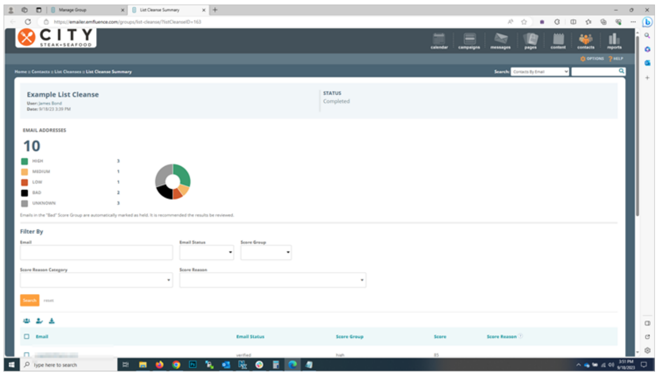
NOTE: Depending on the size and makeup of your list, it may take some time to finish.



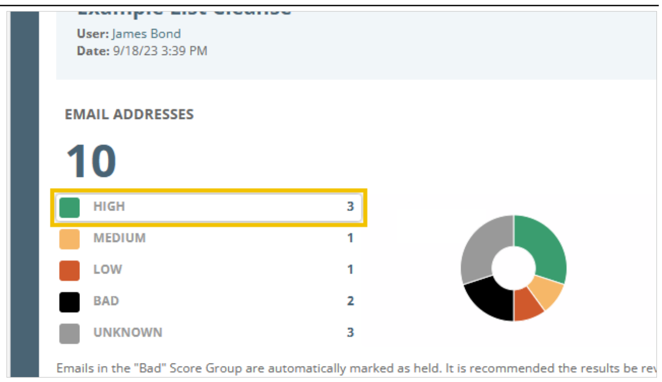
While processing, the List Cleanse Summary page will show the cleanse in process.



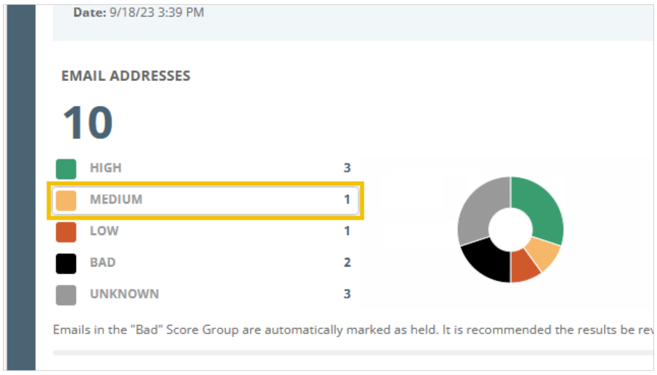
Your results will be scored and displayed in one of several categories. If our provider cannot score a particular email address for any reason it will put it in the Unknown category. Above the list of contacts you will find several filters you can use to filter the results.



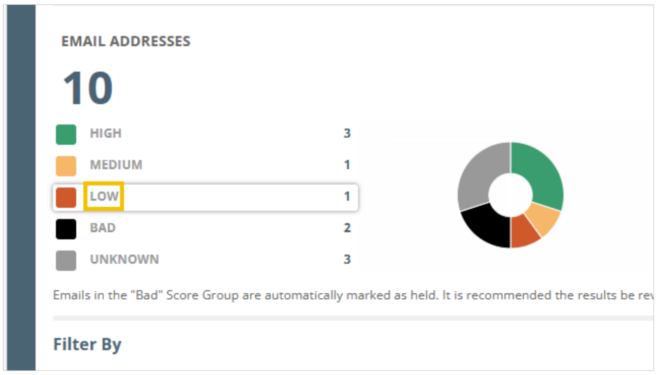
High are the best quality. You can click on the High button to see those results display below, or use the filters to view all High results.



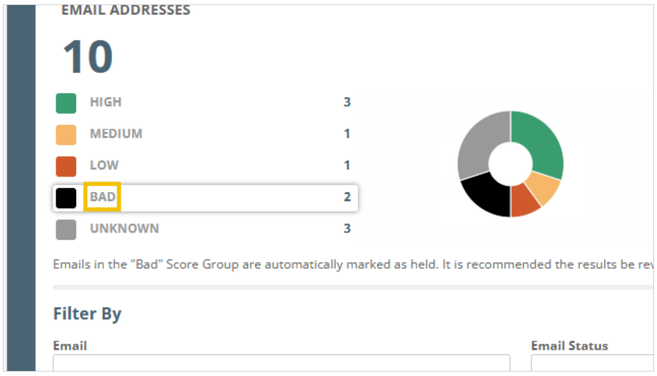
Medium are the next best quality. You may see issues at smaller/private domains. You can click on the Medium button to see those results display below, or use the filters to view all Medium results.



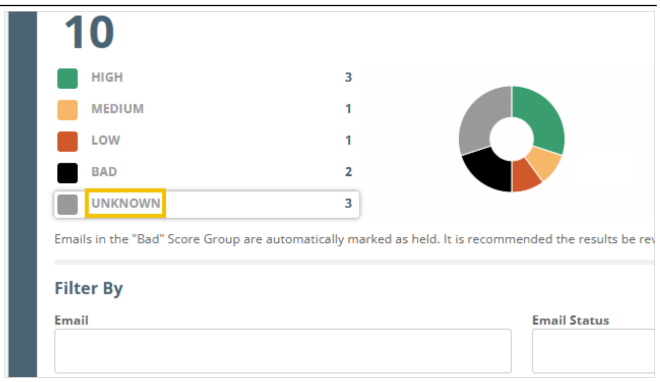
While they are technically valid emails, our provider cautions against sending to **Low** results. Role accounts (such as info, support, sales, etc.) and someone's secondary or tertiary account could be found here. Smaller companies or domains with a smaller footprint can also sometimes be included in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



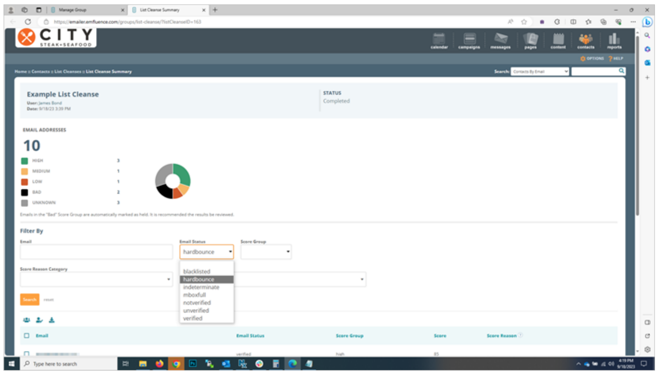
Bad results include addresses that are undeliverable such as those that hard bounced, soft bounced with an error such as mailbox full, or belong to a category of dangerous addresses that could hurt your reputation to send to (spam traps, bots, etc.). Any addresses in the Bad category will be automatically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



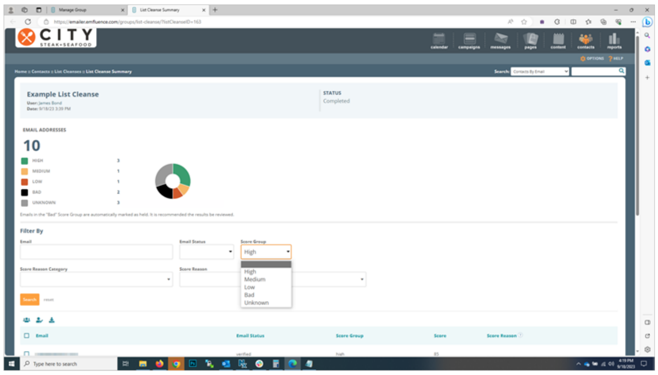
Unknown are addresses, for whatever reason, could neither be verified or confirmed at the time of the cleanse. Our provider cautions against sending to the Unknown category.



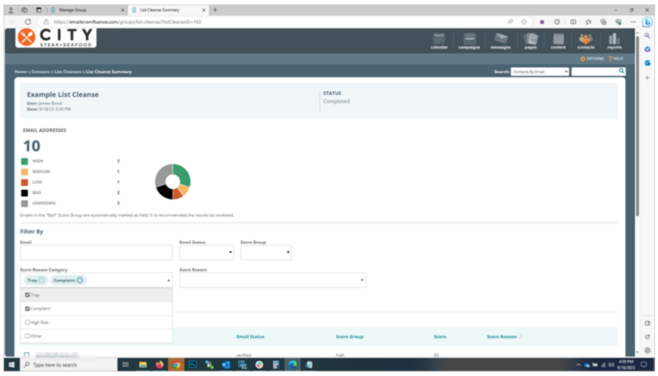
The Email Status selector allows you to look for different types of results such as blacklisted (i.e. dangerous), verified, etc.



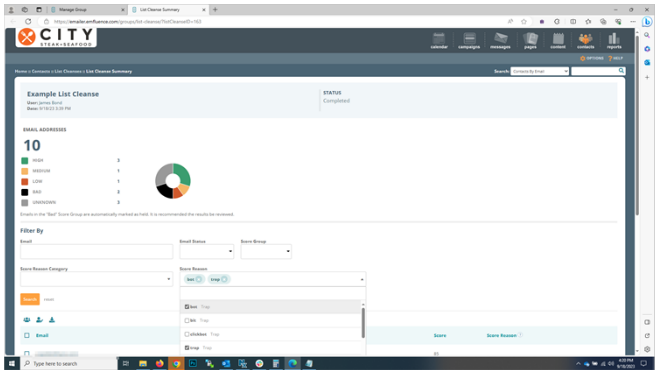
The Score Group filter narrows your results to one of the scored buckets. This is the same filter which is applied by clicking on the links above.



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

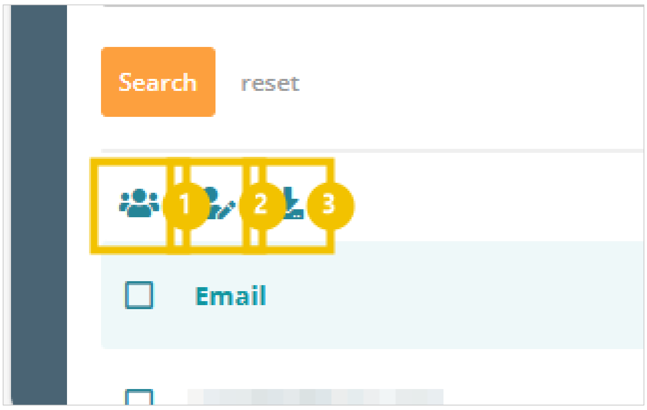


Under Score Reason, you can narrow your filtering to specific types of results such as bots, moles, seeds, traps, etc. The full list of score reasons can be found in the emfluence Help Section.



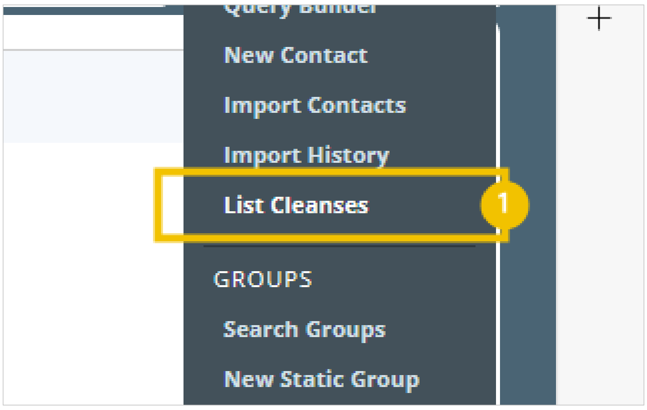
Under the filters, you can take action on the selected contacts.

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.

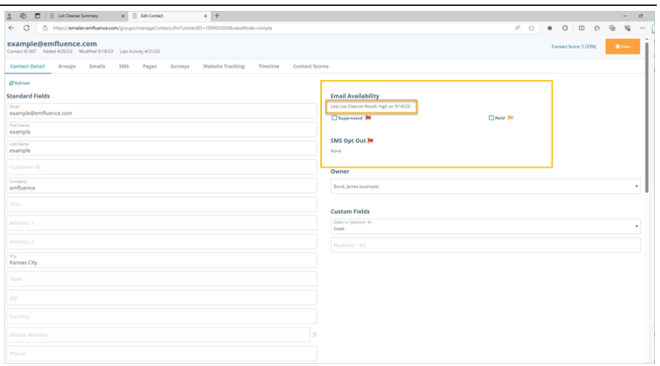


Previously run lists can be found in the Contacts menu dropdown under List Cleanses.

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

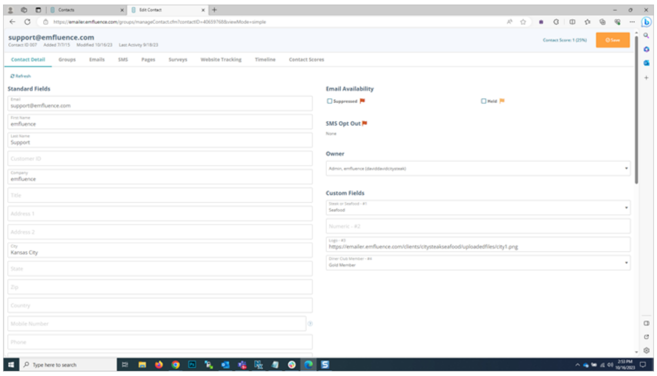


Contact records which have been cleansed will display the last cleanse date just above the Suppressed and Held status under Email Deliverability.



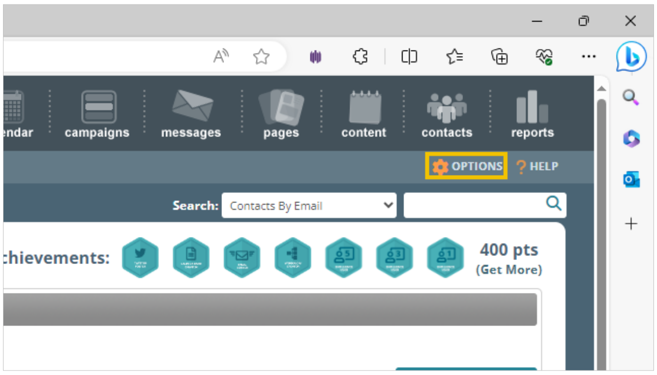
2.6. Custom Fields

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.

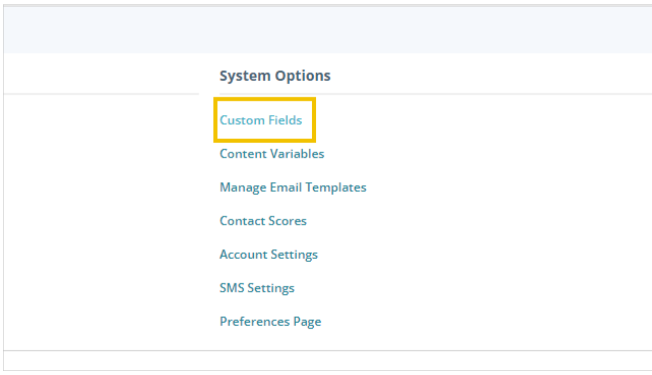


arapp@emfluence.com

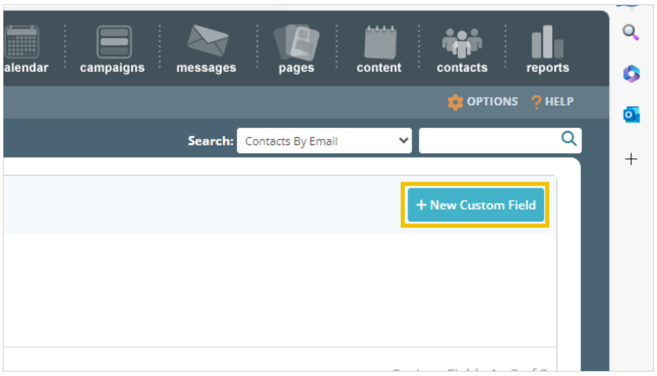
To edit existing custom fields and create new fields, click on **OPTIONS**.



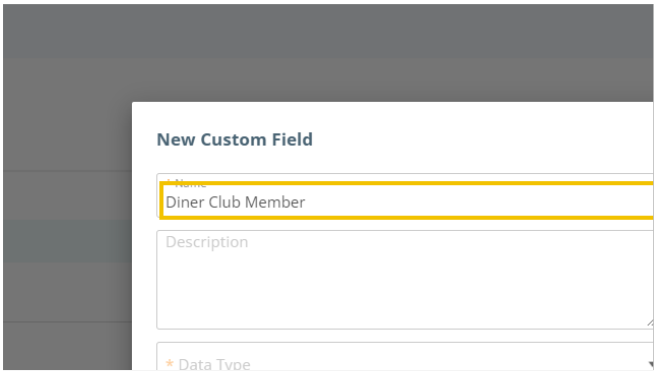
In the middle column, under **System Options**, find and click on **Custom Fields**.



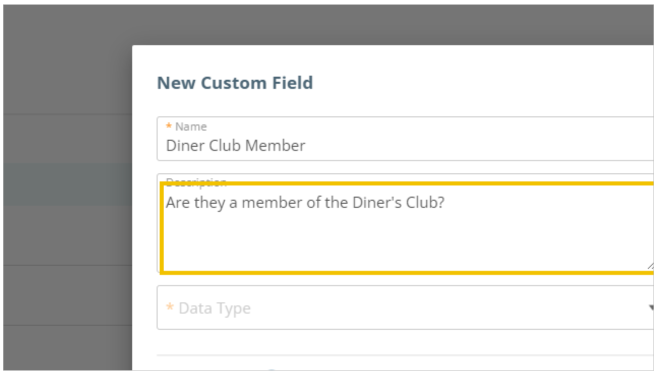
To create a new custom field, click on **New Custom Field**.



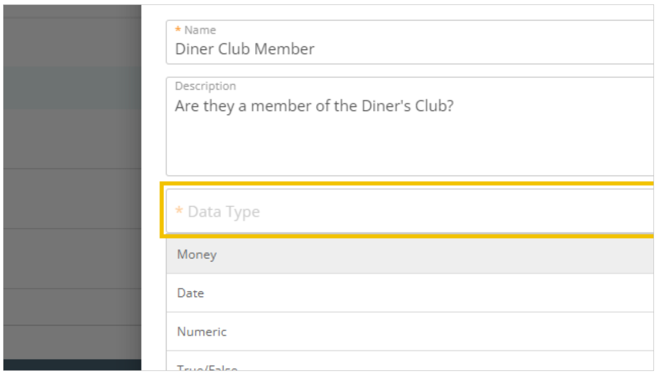
Give your new field a name. You will be able to edit the name of your field later if you wish.



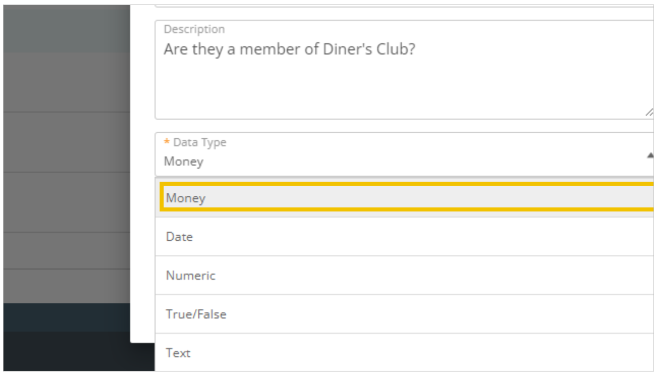
You can add a description for your field to provide more information about how you are using the field in emfluence to your team's other users. Descriptions are not required.



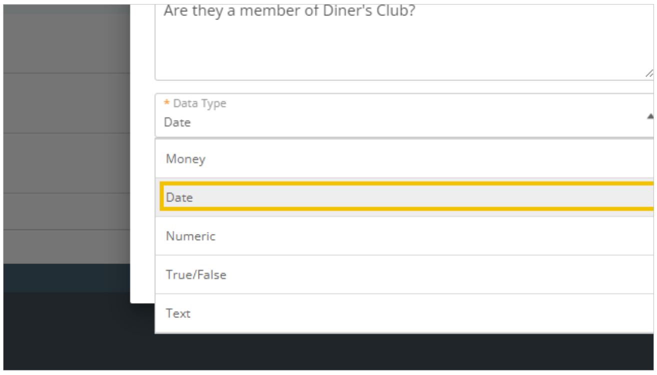
Choose the **Data Type**. Data can be stored in several different types. While you do have the ability to change the data type at a later date, doing so will wipe all values saved for that field in emfluence so it is not recommended.



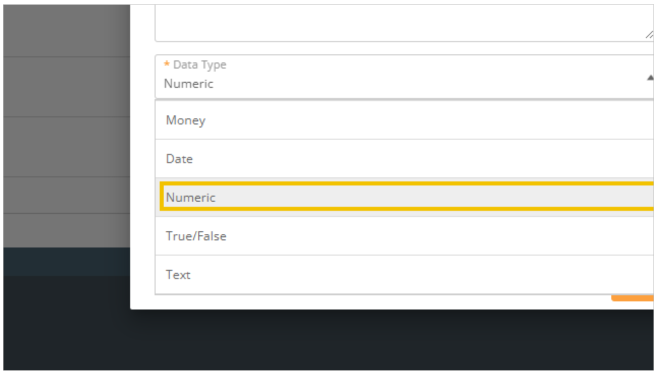
The **Money** field is a numeric field with a decimal place two places in. To allow for different type of currency, the field does not include a dollar sign, pound sign, etc. When using this field as a variable in an email, remember to add the appropriate monetary sign before the variable.



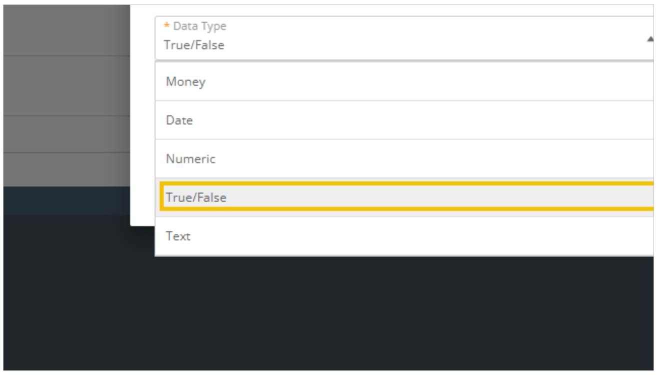
The **Date** field stores data in a standard MM/DD/YYYY format. It will also accept M/D/YYYY or YYYY/MM/DD values. A date field will not accept a time stamp along with the date. It is a date field only.



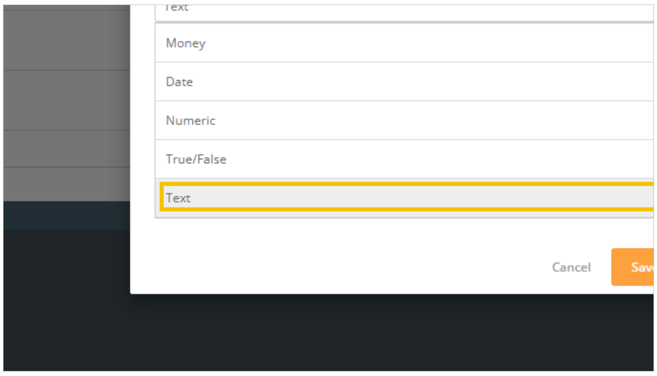
The **Numeric** field will accept any numeric value up to 14 characters. When choosing a numeric field, you can choose to include a decimal.
NOTE: If you are saving an alphanumeric ID or an ID that includes dashed values, you would want to save as a text field rather than a numeric field. A numeric field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



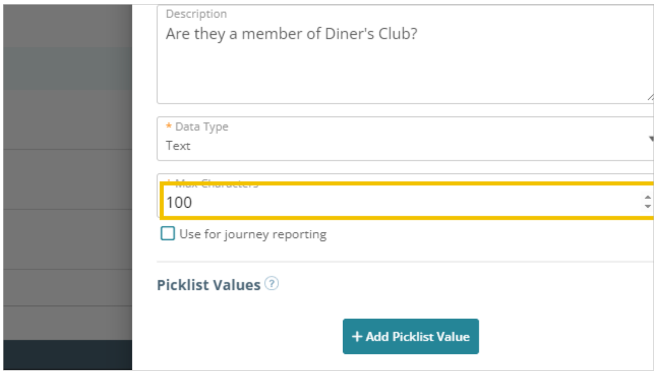
The **True/False** field is a Boolean field that will accept values of True, False, 1, and 0.



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

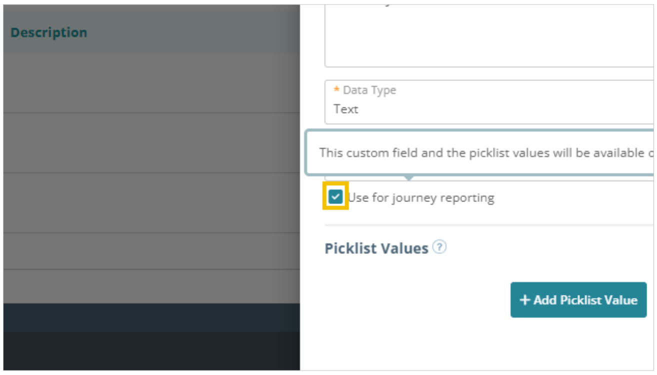


When creating a text field you will need to choose a max character count. By default, 100 characters is chosen. You can expand this up to a maximum of 1,000 characters. No value larger than that can be saved in a custom field.



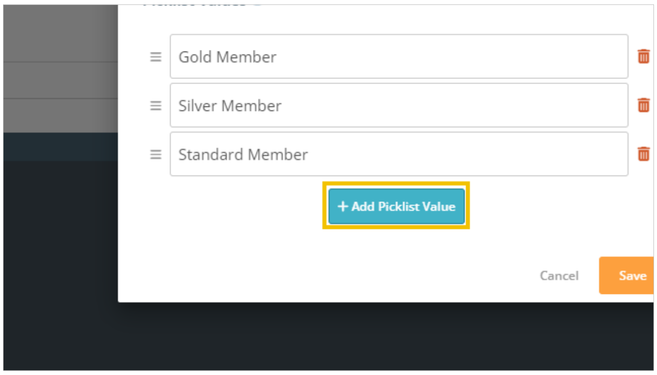
If you wish, text fields can be used in **Journey Reporting**. To enable this, check the box and add at least a single picklist value.

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.

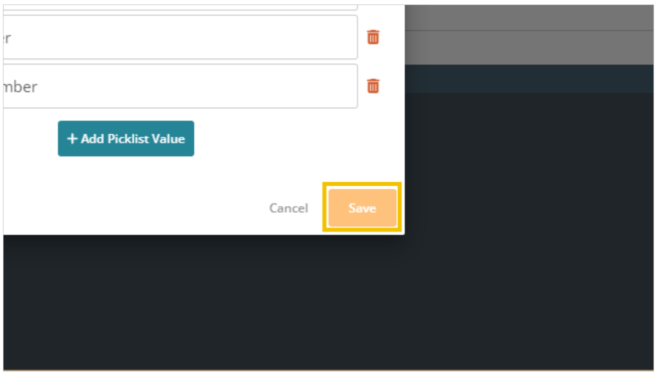


Picklist Values limit what data can be saved in this field to exact values listed here. Attempts to save a different value to this field will fail.

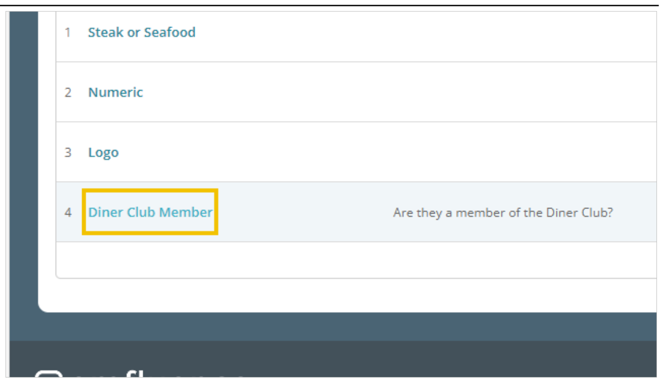
Picklist Values can be used to enable Journey Reporting which is visible on the home page dashboard. They may also be in place to limit entries to this field to a very specific set of values.



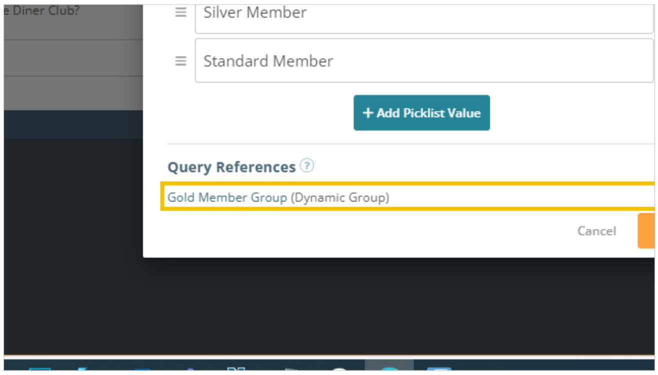
After you have finished creating your custom field, click to **Save**.



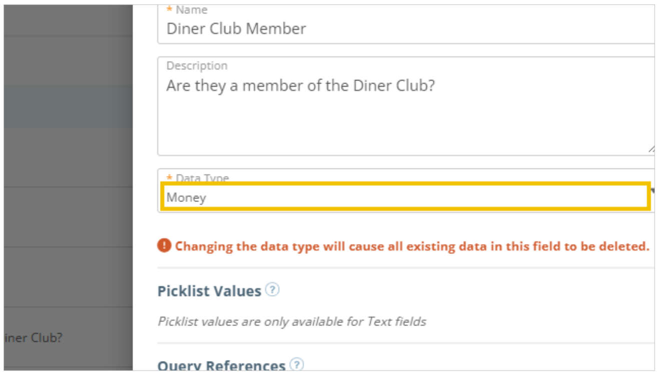
To edit a custom field, click on the field's name. This will launch the same pop-up used when creating a field.



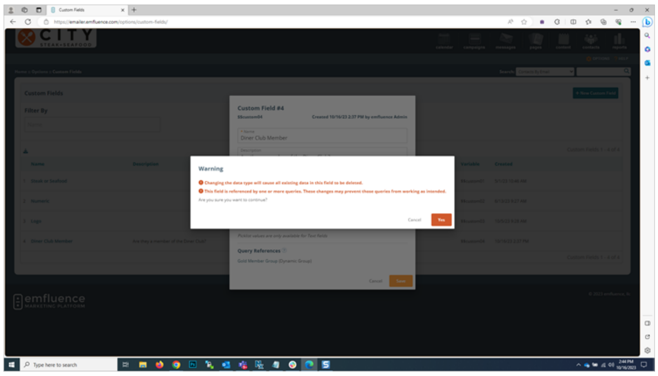
At the bottom of the field, under **Query References**, you will see any saved queries making use of this custom field. These could be in dynamic groups, workflow decisions, or in exit conditions of a workflow. You can click on any result in this section to be taken to that query.



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.



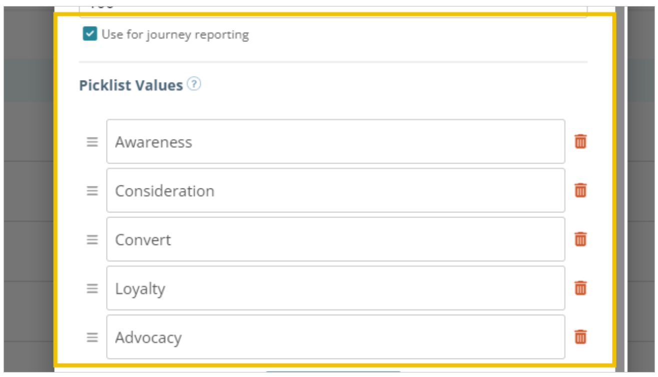
If you choose to overwrite values on your custom field, and click save, you will get a secondary warning letting you know if any queries could potentially be broken by this change and that any saved values in this field will be wiped out. There is no undo button, so just be certain you are ready before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



2.7. Journey Stage

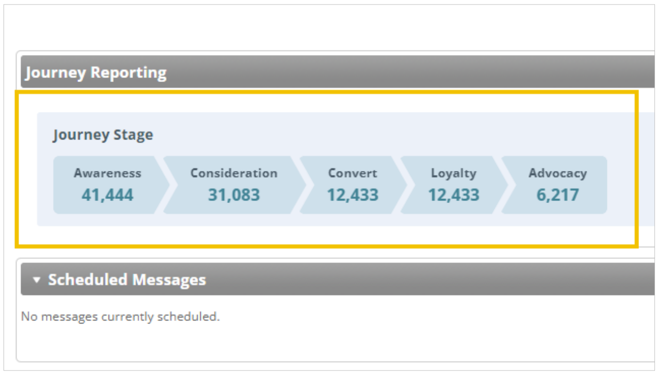
Through saving a set value on a **Custom Field** in emfluence, you can track each of your contacts' customer journey from Awareness through Advocacy.

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.

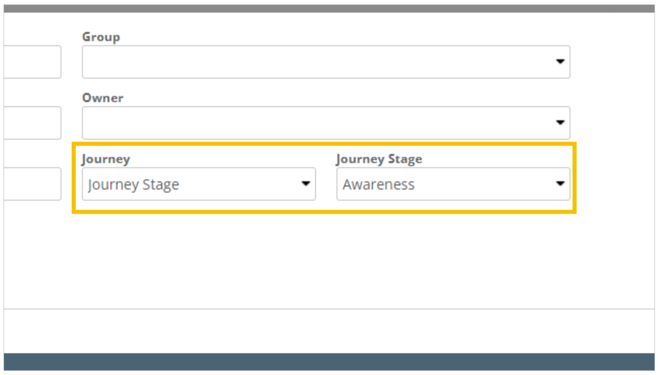


On the home page, if **Journey Reporting** has been enabled for any field, you will see the chart displayed with the breakdown of how many contacts appear in each stage. As with any of the charts on the home page, you can move it up or down in your list through the Options button at the bottom of the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

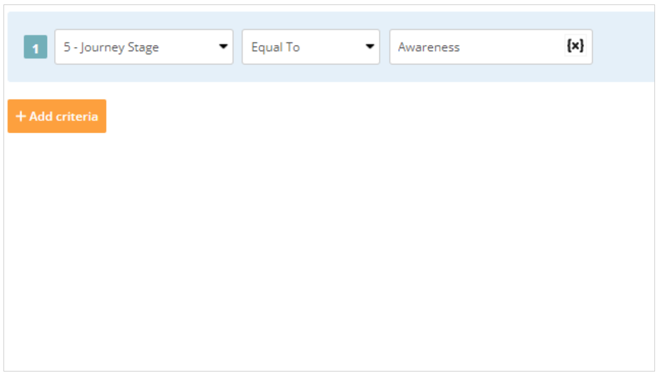
You can click on any of the stages to advance to the Search Contacts page with a list of those contacts in that page displayed.



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.



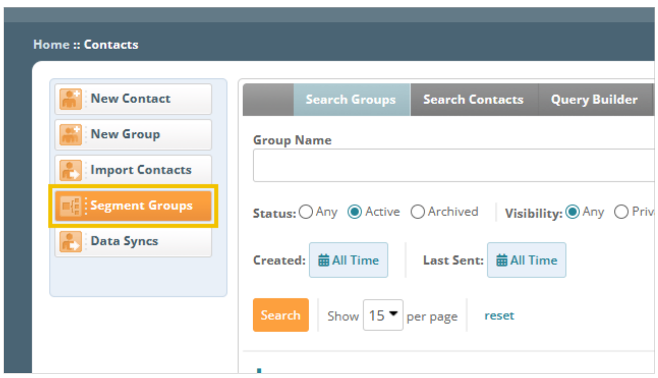
If you choose, you could also make use of **Query Builder** to search and create **Dynamic Groups** for each of your stages to make it easy to market to each subset quickly.



2.8. Segment Groups

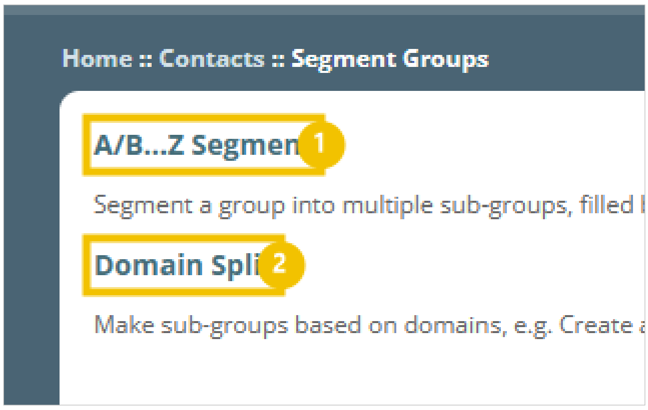
Before proceeding, you might want to check out emfluence's A/B Testing (available to randomly split your list within the email) and decide if it fits your segmentation needs.

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**.

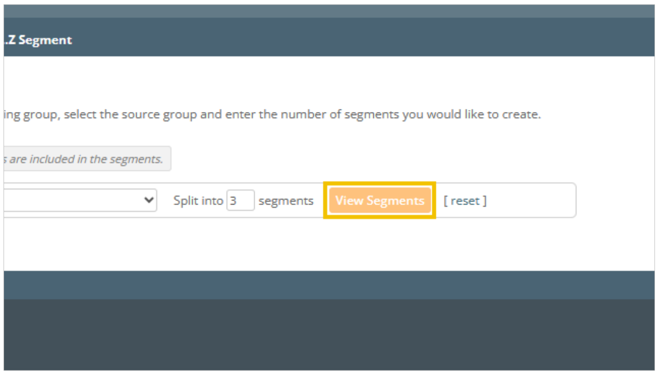


For your segmentation, you can either choose a random A/B split or choose a Domain split.

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

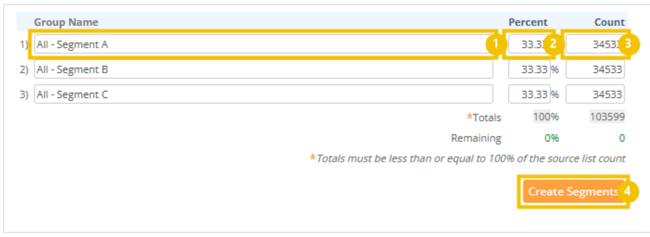


To create an A/B Split, choose your starting group from the dropdwn and then type the number of random segments you wish to create. Each segment will be created as a separate emfluence group. When finished, click on **View Segments.**



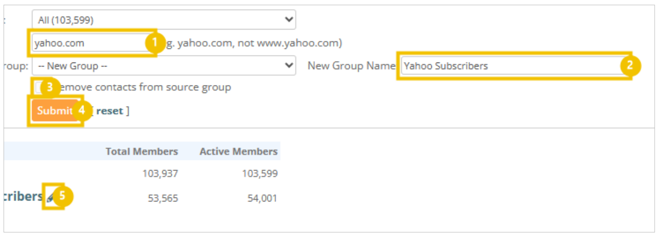
On the next page, you can make changes by editing the group names and counts before saving and creating the groups.

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.



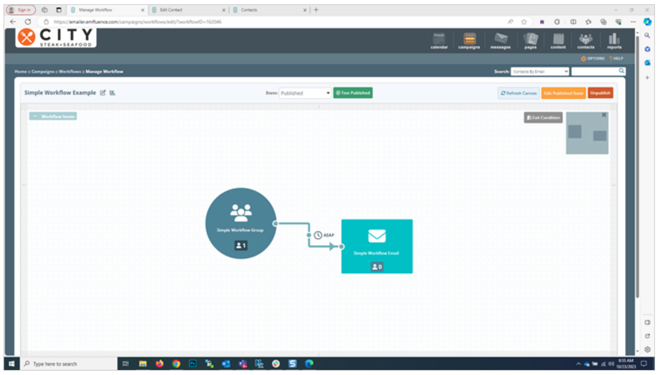
As with A/B Split, in Domain Split you will start by choosing the source group and then make choices on what to do with your results.

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.



2.9. Adding Contacts to Workflows

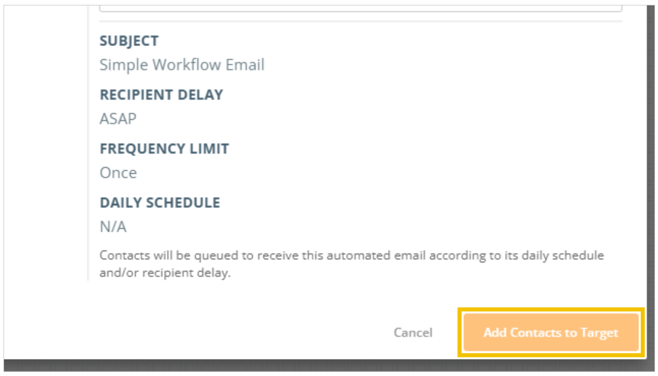
The natural way for contacts to get added to a workflow are to be added to the starting group or fill out a landing page form sumbission that kicks off a workflow. If your group is a dynamic group, the query itself will decide who gets added. Only contacts matching a dynamic group's query will be added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

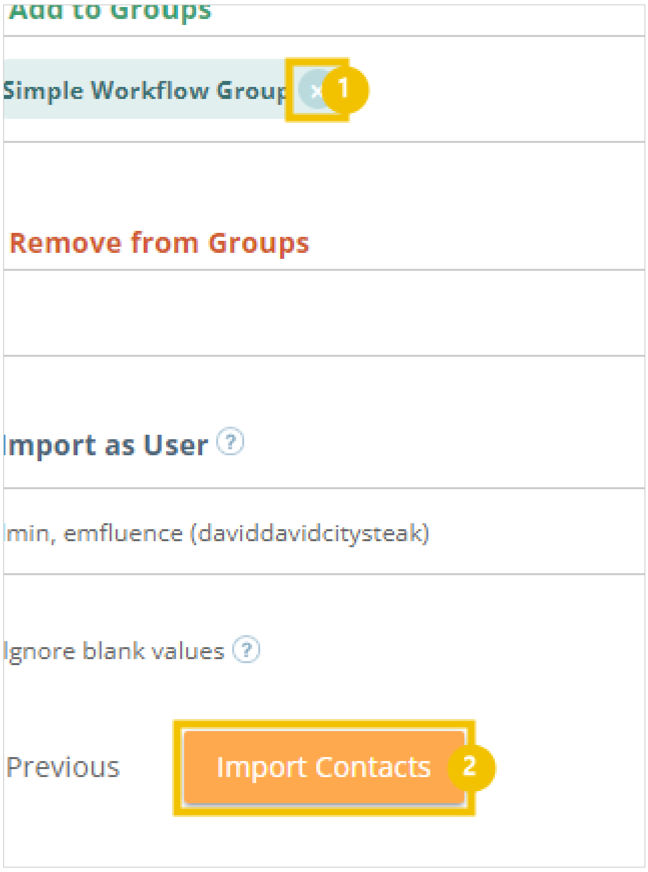
Choose the spot in the workflow you want to add the contacts to and click **Add Contacts to Target**.

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.

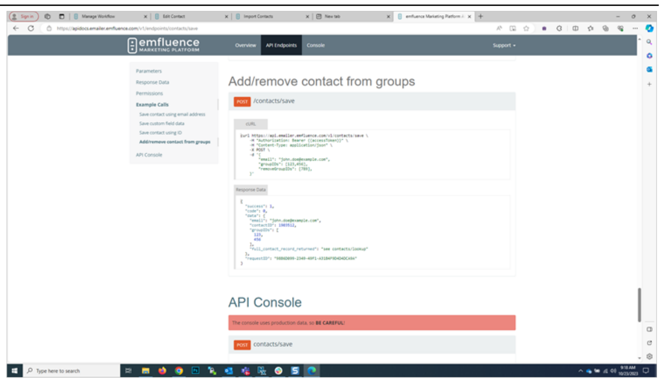


The easiest way to bulk add contacts to a workflow with a starting static group would be by importing a list of contacts and adding them to the group. NOTE: Contacts already in the group cannot be readded without first being removed.

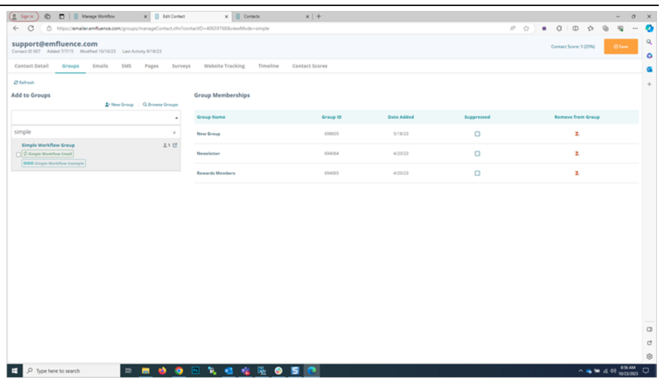
1. **Select Group**: Select the group you wish to add your contacts to.
2. **Import Contacts**: Import your list.



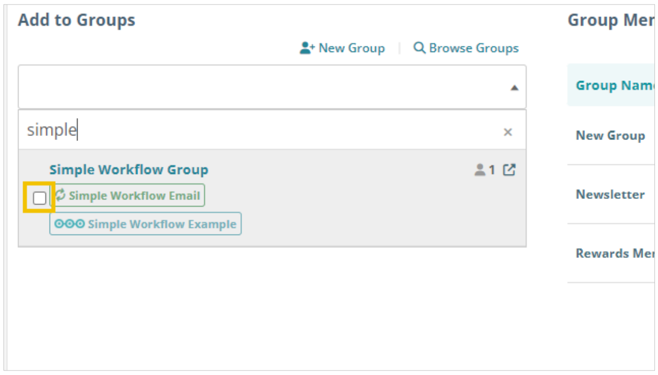
Contacts can also be added to groups through the emfluence API or through a secure FTP data sync.



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.

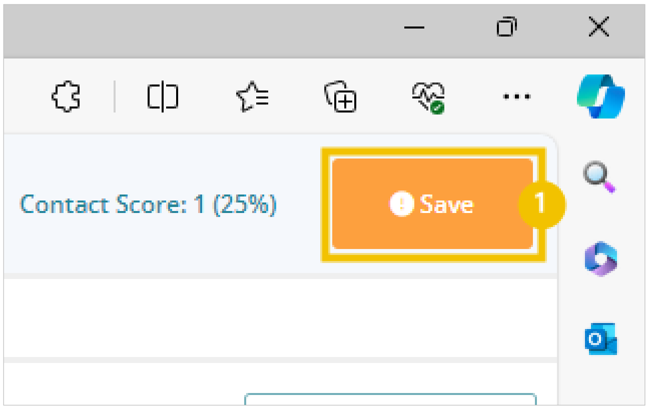


If the group is connected to an automated email and workflow you will see those listed under the group name. Check the box to select that group to add the contact to.

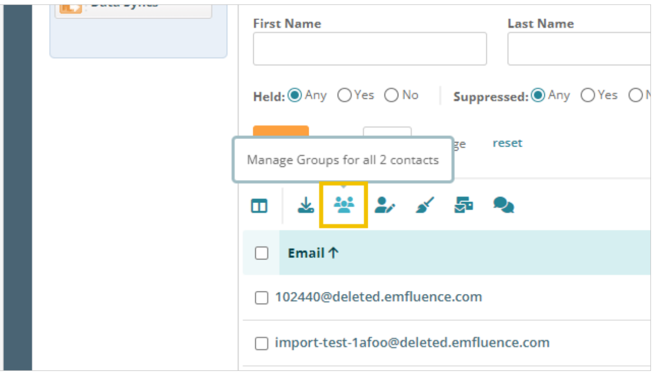


You will see a warning displayed at the top of the contact that they will be added to a workflow.

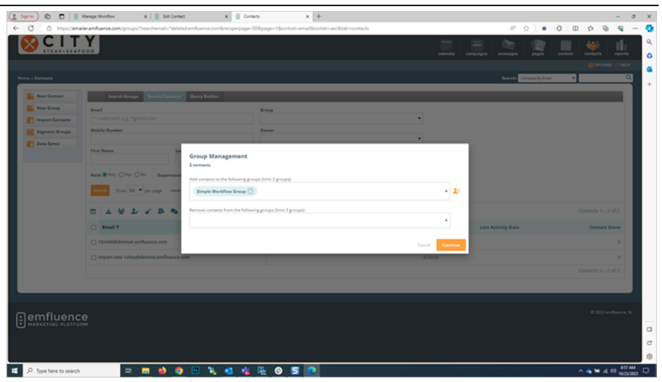
1. **Save**: Click to save your choice to add the contact to the group.



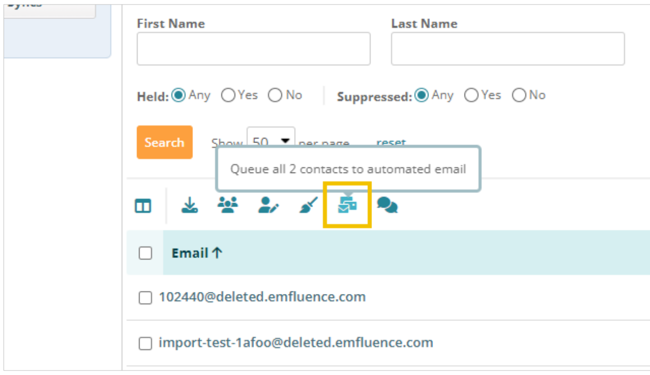
You can also add lists of contacts to groups by clicking the **Manage Groups** button above a list of contacts.



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

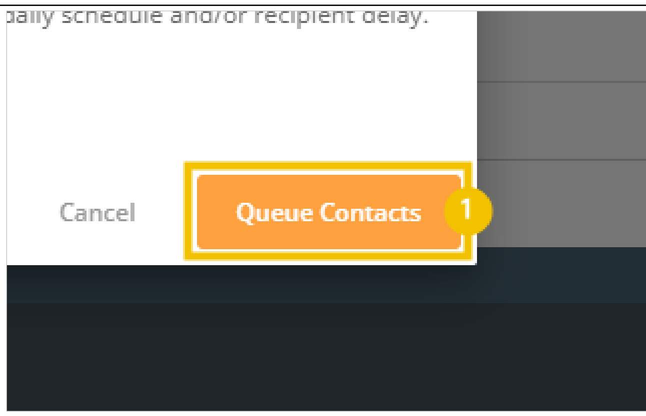


You can also use the **Queue** button to queue a list of contacts to an emfluence automated email (rather than adding them to the group). Click on the button to **Queue all contacts to automated email**.



Find the automated email from the search results.

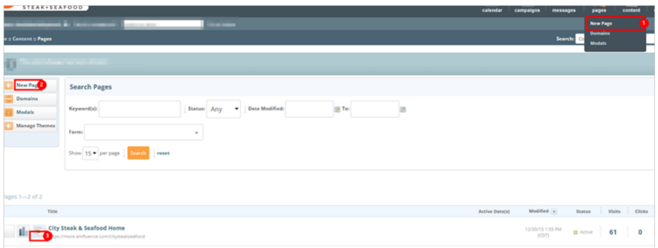
1. **Queue Contacts**: Click the button to confirm you wish to queue this list of contacts to your automated email.



3. Pages

3.1. Create a Landing Page

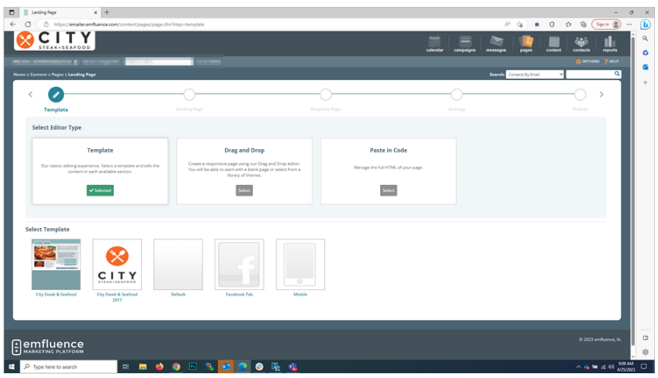
You can create a new page in the Pages section by clicking New Page in the left-sidebar menu, clicking the New Page option in the top navigation dropdown, or using the copy button on an existing page to start with a copy of that page.



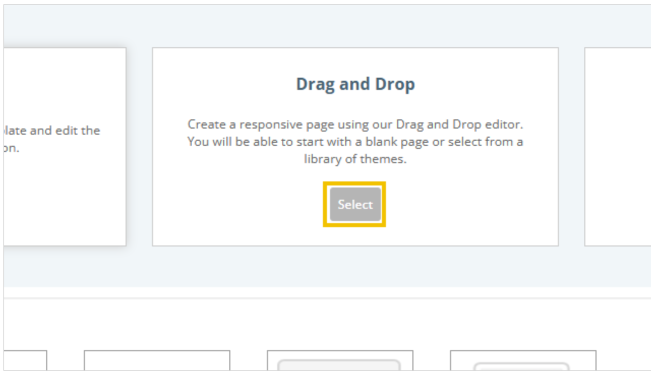
1. **New Page**: Create a new page from the top navigation dropdown menu.
2. **New Page**: Create a new page from the left-sidebar navigation.
3. **Copy a Page**: Make a copy of an existing page by using the copy button.

3.1.1. Choose your Page Theme or Template

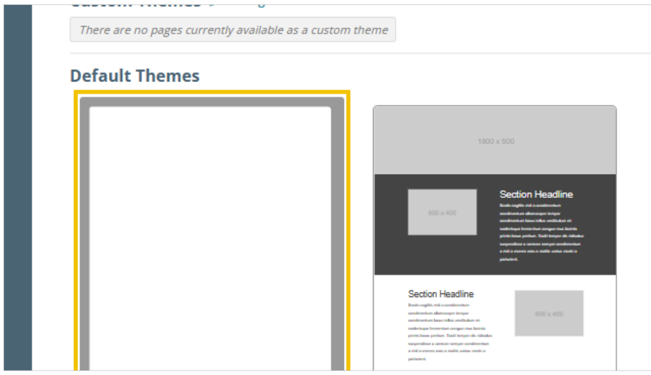
On the next page you can either select an older precoded template or use the Drag & Drop editor to create a page. emfluence has moved away from landing page templates allowing users far more freedom with pages using the Drag & Drop option. Alternatively, if you want to code the page entirely on your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

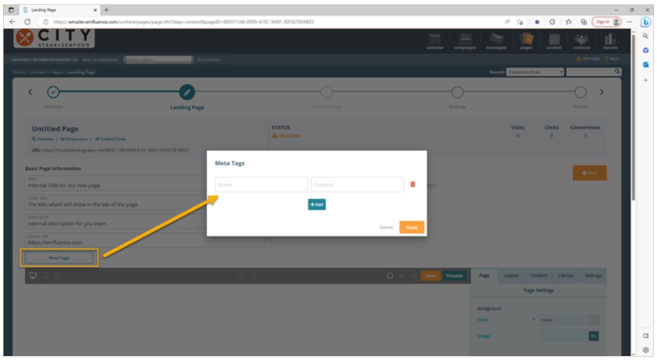


3.1.2. Set Basic Information

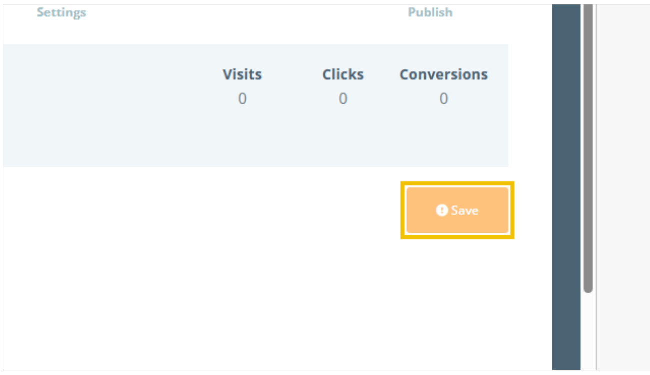
Fill in the Basic Page Information.

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.



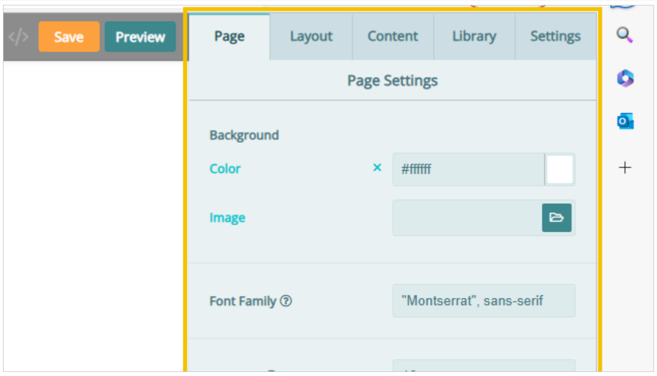
Click **Save** to save the settings on your page.



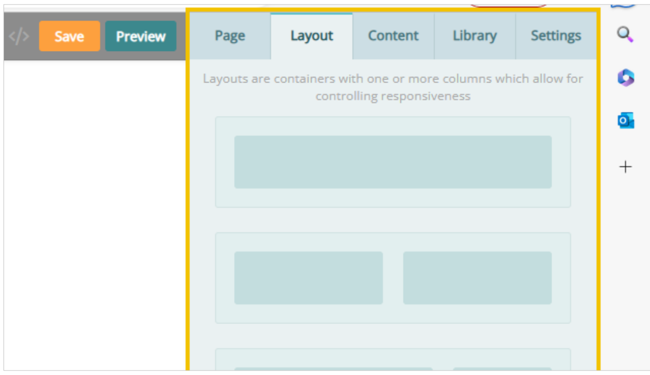
3.1.3. Design Your Page

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

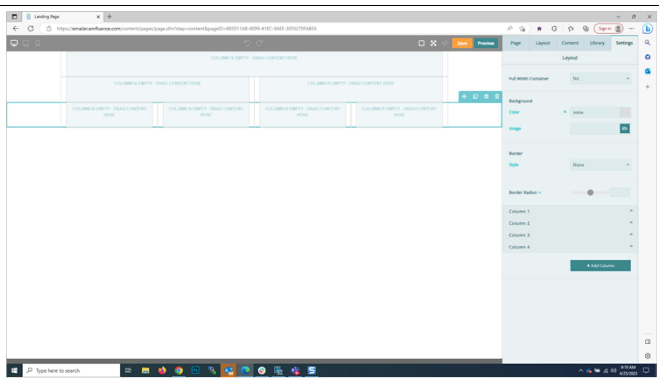
Your settings for your page can be found in the right-sidebar. The **Page** tab allows you to set basic settings for your page including a background color and/or image, a default font family and size, and add additional CSS to the head section of the page. These settings will apply to the entirety of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



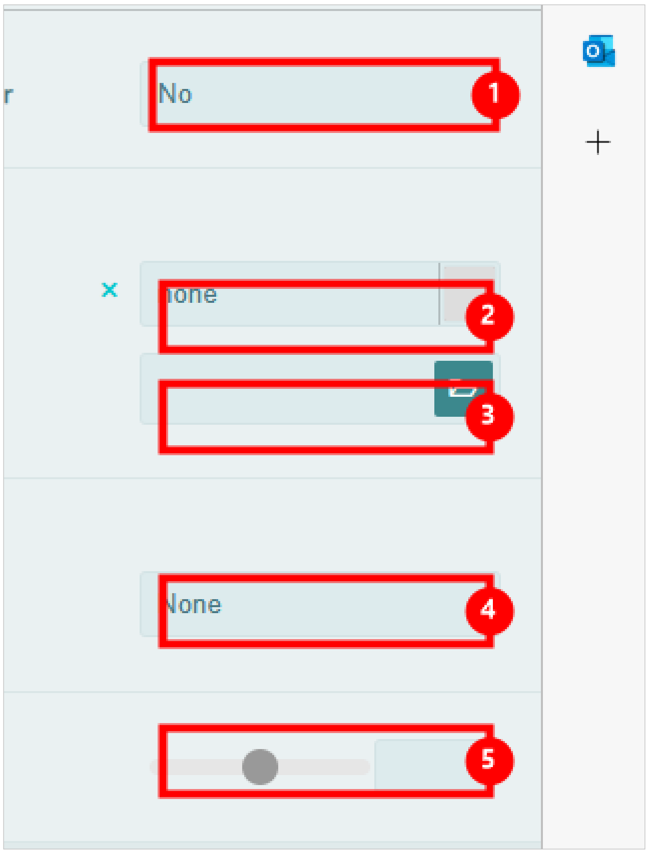
Drag out Layouts to create a wire frame, or structure, for your page. You can then drag out content and library items into the layouts.



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

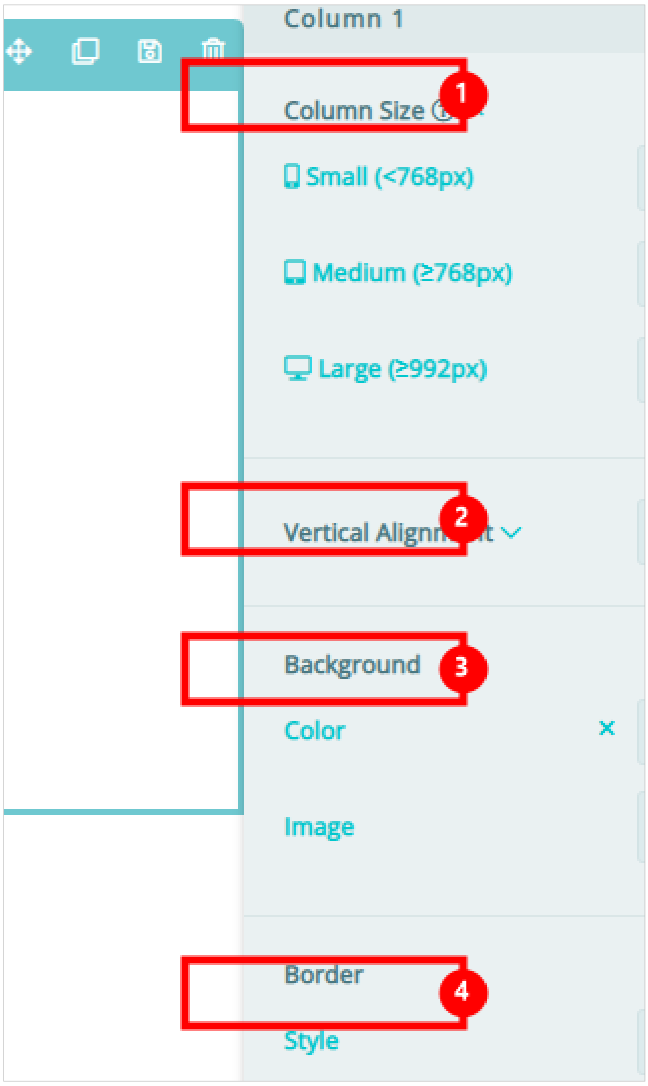
When Layouts are selected, you can set settings for the entire Layout under the Settings tab.



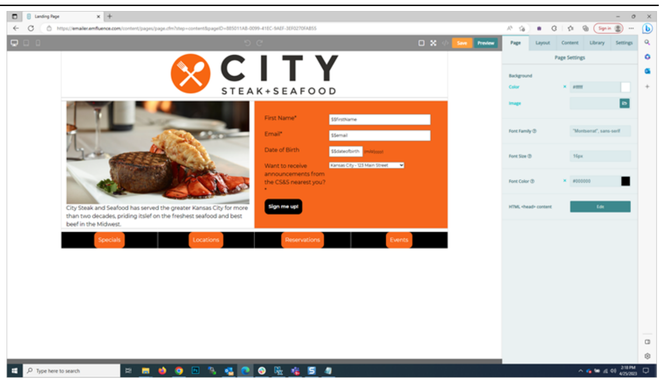
1. **Full Width Container**: By default, your page has margins on both sides, but any layout can be made to expand to the full width of the page by changing this value to yes.
2. **Background Color**: Set a background color across the entire layout. If the layout has multiple columns, this will set the 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.

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.

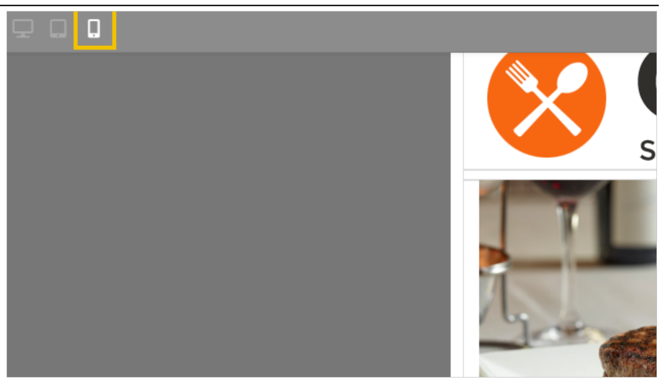
1. **Column Size**: This adjusts the responsiveness of your columns on different sized screens. Responsiveness is applied by default, but you can change the settings on how each column will render (and even hide certain columns on some sizes if you wish).
2. **Vertical Alignment**: By default, your columns 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 Stylizing your page.



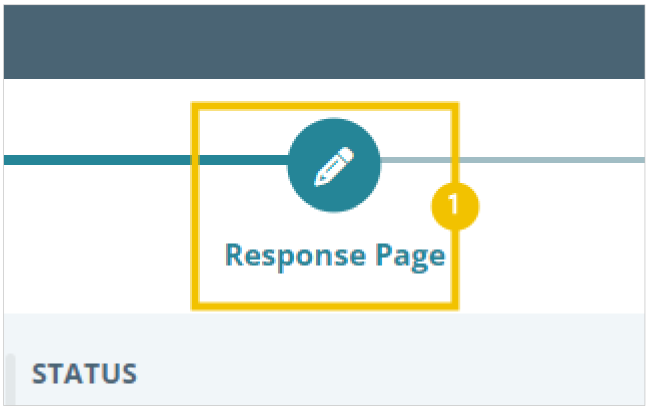
You can use the device settings to test the responsiveness of your page on large, medium, and small devices. You can also use the preview button to preview the page in your browser.



3.2. Response Page

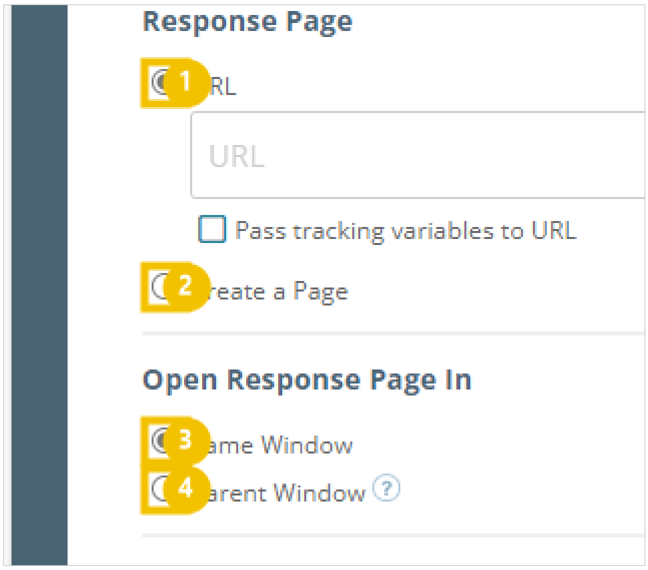
When creating a Landing Page with an emfluence Form, you will unlock the Response Page step. As the step deals with processing data after a form entry, pages without a form will not have this step enabled.

1. **Response Page**: The Response Page will be unlocked on Landing Pages that include an emfluence Form.



Under Response Page, choose what happens to the page after a submission occurs on your Landing Page.

1. **URL**: Push the contact to a URL of your choice such as a page on your website or another emfluence page. If you want the page to simply reload, use the page's URL as the response page's URL.
2. **Create a Page**: Rather than directing form submitters to an existing URL, create a page to load after submission. You will follow the same steps used to create your original page with the option to copy that page and then make changes for your response page.
3. **Same Window**: Choose to load the page in the same window. If your page is framed in your website or a modal this will load the response page in that frame.
4. **Parent Window**: Choose to load the page to the parent window. If your content is in a frame or modal and you want the outside URL (not just content within the frame) to change, choose this option.

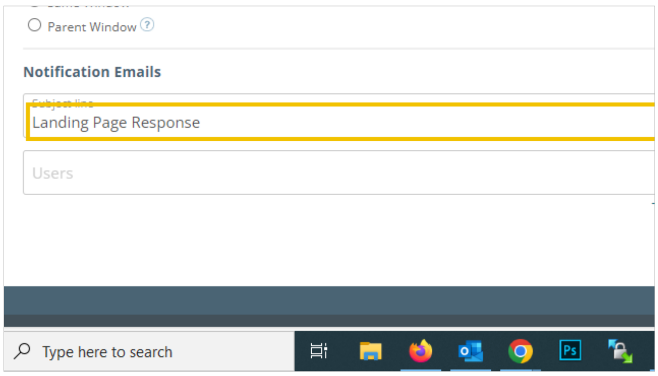


3.2.1. Notifications

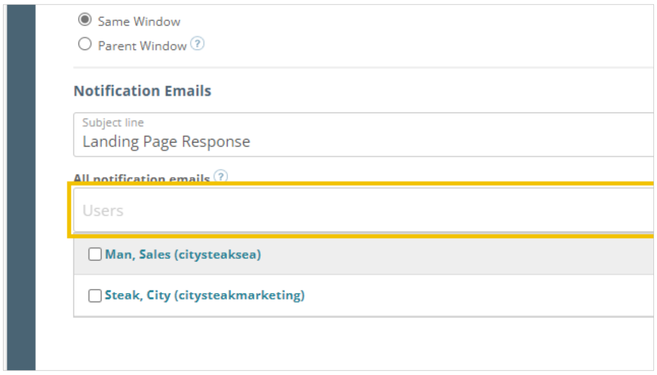
Under **Notification Emails**, you can set up email notifications for users to be notified when form submissions occur. Change the title to be whatever you wish, and then pick the user(s) to add to the notification.

NOTE #1: For users to be able to receive these notifications, their user must have the Landing Page conversion notification permission enabled under their Notifications settings.

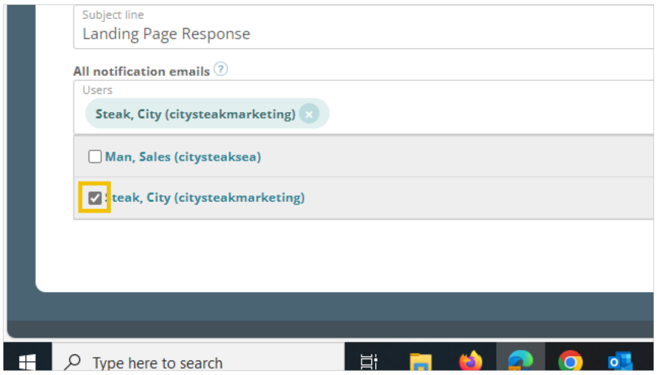
NOTE #2: Consider whether or not the personal data on your form should be passed via email before setting up notifications.



To add users to receive a notification email every time someone completes the form, click on **Users**.

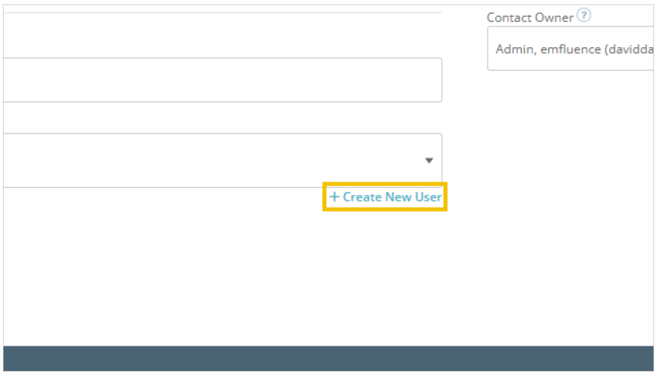


From the dropdown menu choose any user you want to receive the notification email. Check the box next to their name.

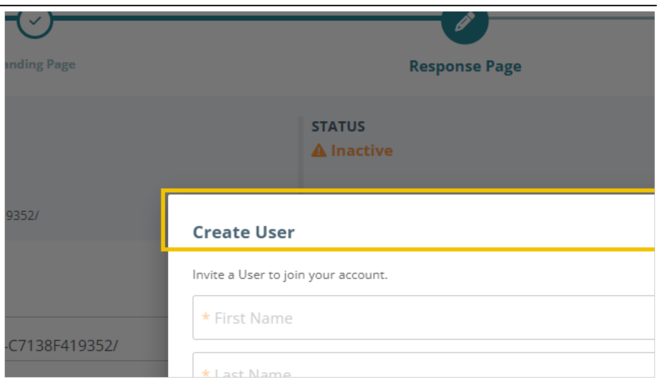


If you want to deploy users to an email address that currently doesn't have a user in the system, you will need to create a user for them. If they don't need access to any other part of the system, consider creating them as a notifications-only user.

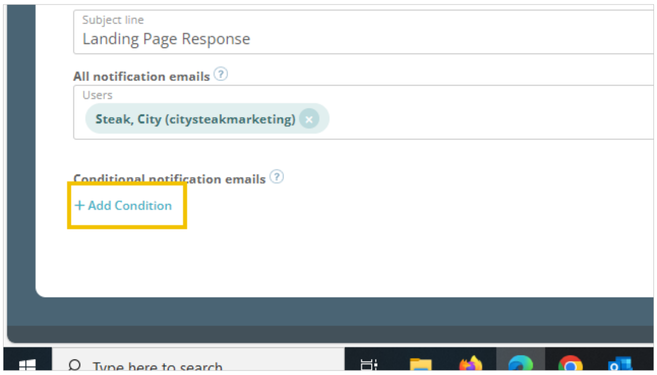
To create, click on **Create New User**.



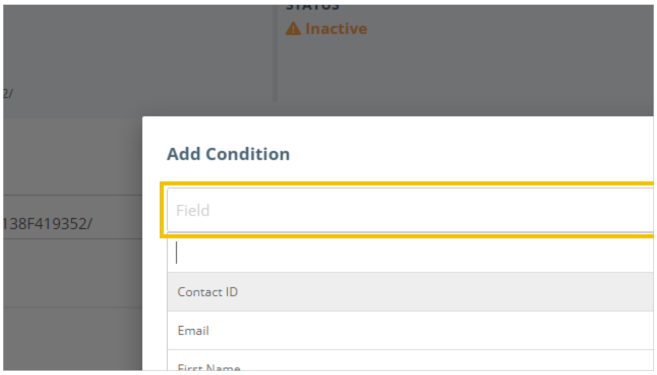
Fill out the necessary information and confirm.



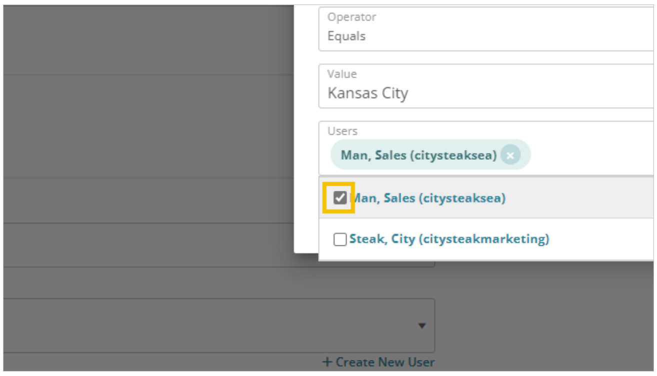
If you want users to only receive some, but not all, notifications for new submissions, you can make use of the Conditional notification emails option. Click on **Add Condition**.



To enable this feature, you will have to set up the logic for when you want this notification to deploy. To start, click into **Field**.

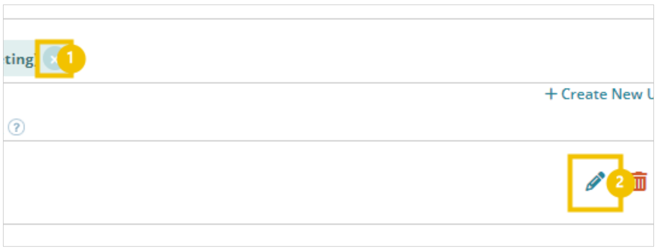


After filling out the logic, use the Users dropdown and select any user you wish to see receive notification emails. Check the box next to their name which will add them to the list of users selected.



Once finished, you will see your notifications selections shown on the page. Remember to save your settings.

1. **All notification emails**: Users selected to receive all notification emails will be shown here. To remove, click the X icon next to the name.
2. **Conditional notification emails**: Users selected to receive only some notifications by logic will be displayed here. You can edit your logic by clicking the pencil, delete the notification by clicking the trashcan, and add separate logic by clicking on Add Condition.

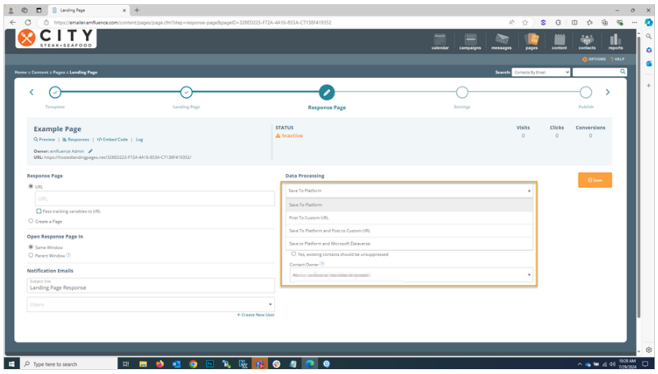


3.2.2. Data Processing

Under **Data Processing**, you can choose where data is processed on a new form entry.

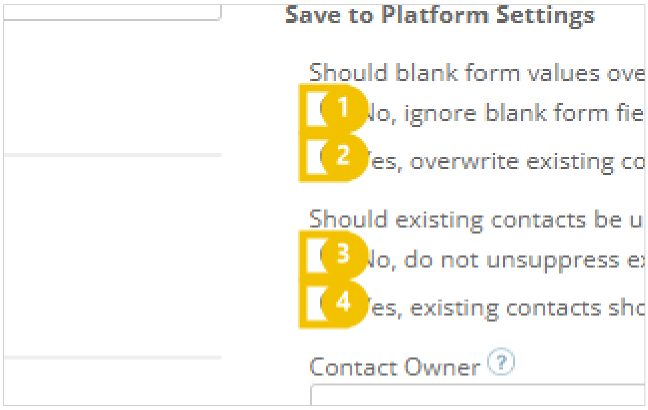
The default setting is to save data only to the emfluence Platform.

You can also choose to post to a custom URL or emfluence and Microsoft Dataverse. NOTE: In order for the Dataverse connection to work you must already have an existing integration set up and running.



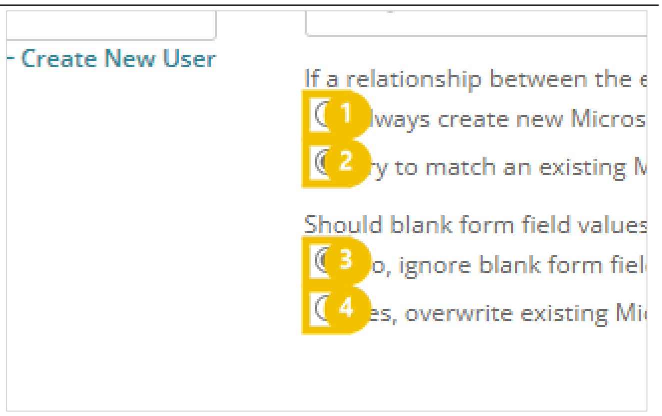
Under Save to Platform Settings you can make choices about data saved to emfluence from a landing page form entry

1. **No, ignore blank form field values**: By default, emfluence will not save blank entries in forms which might overwrite existing data.
2. **Yes, overwrite existing contact data with blank form field values**: If you choose, you can allow blank values to overwrite data in emfluence for any field left blank on a form entry.
3. **No, do not unsuppress existing contacts**: By default, suppression is not changed by a form entry. If the contact was suppressed prior to the form entry they would remain suppressed.
4. **Yes, existing contacts should be unsuppressed**: If the form is acting as a chance for someone to opt back into your list you can choose to allow an entry to reset the suppression record of a contact.

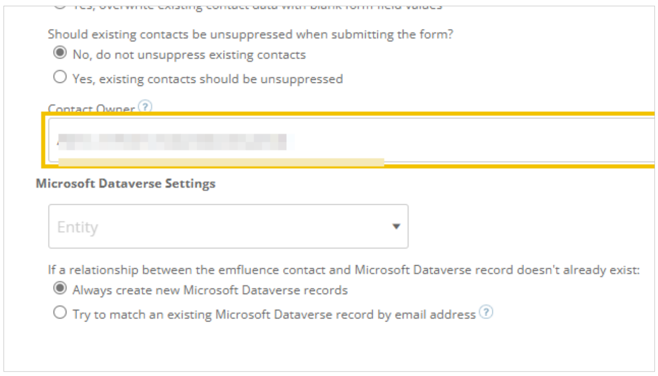


If you have the Dataverse integration set up you can choose to also post data to CRM. To do this, first choose the entity (i.e. Leads or Contacts) to Dataverse. Only entities you have mapped, and only the mapped fields on those entities, can share data.

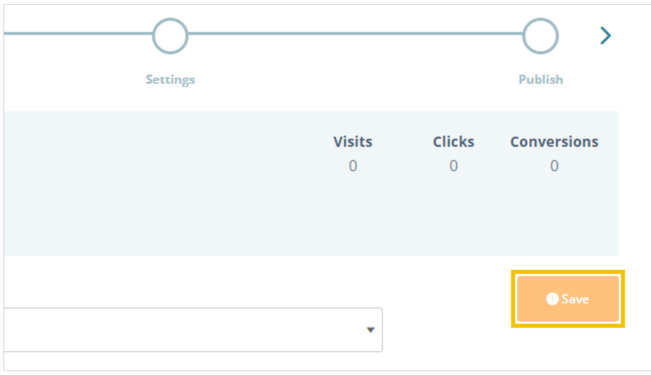
1. **Always create new Microsoft Dataverse records**: By default, the option when sharing data to Dataverse is to always create a new record.
2. **Try to match an existing Microsoft Dataverse record by email address**: Rather than always creating a new record, you can choose to first attempt to match a entity record based on email address.
3. **No, ignore blank form field values**: By default, blank entries on forms will not overwrite existing fields in CRM.
4. **Yes, overwrite existing Microsoft Dataverse data with blank form field values**: If you wish for blank entries to overwrite data in CRM, you can choose to enable this option.



Every new contact added to the emfluence Platform will record an owner. For Landing Page entries, the default owner will be the user who created the page. If you would like to change this to be a different user by default, choose from the user dropdown.



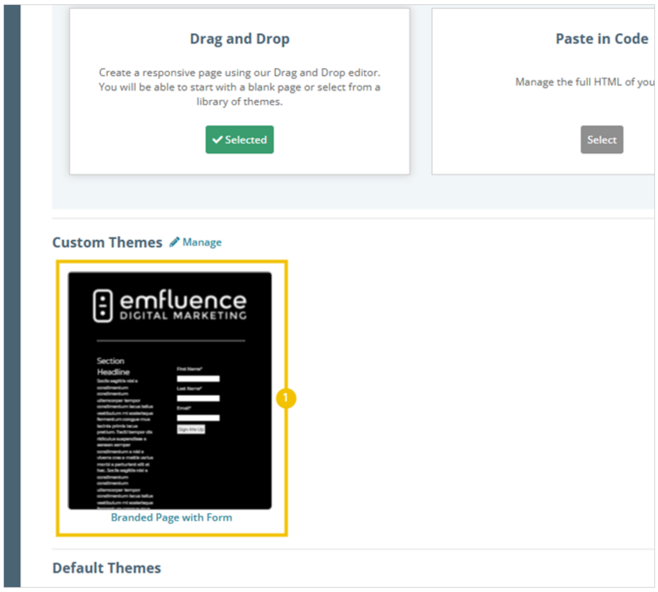
Once you have finished your Response Page settings, click **Save** and continue on the **Settings** and **Publish** steps to activate your page.



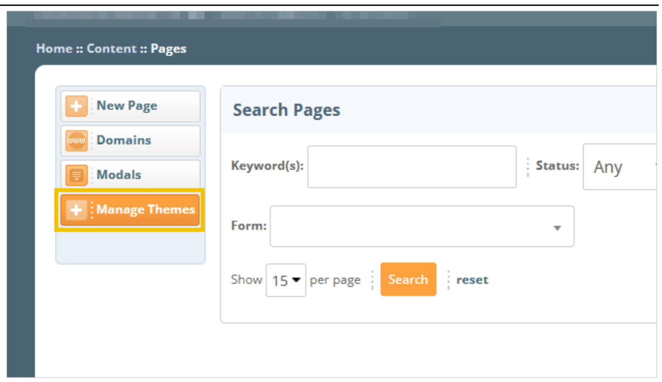
3.3. Create a Page Theme

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.

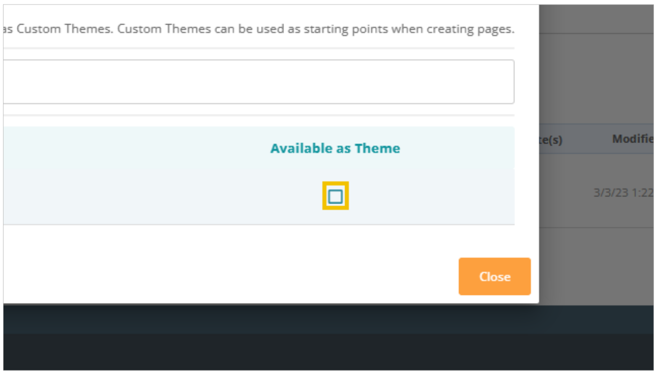
1. **Custom Theme**:



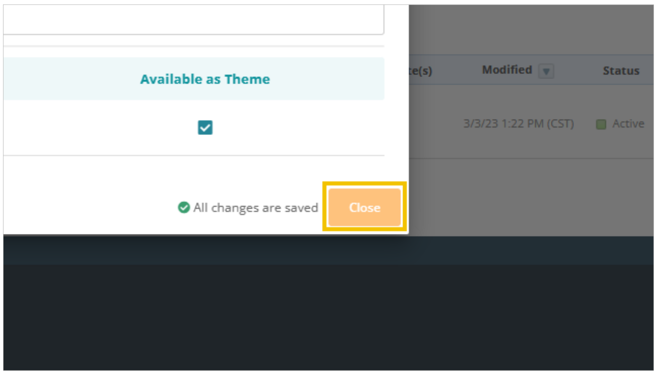
To save a page as a custom theme, first you will need a saved page within the platform. To save that page as a theme, click on the button **Manage Themes**



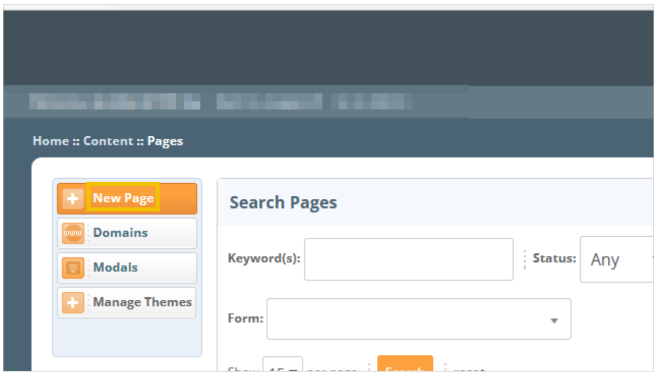
In the pop-up, search for and find the page which you want to make into a custom theme. **Check the box** to make it available



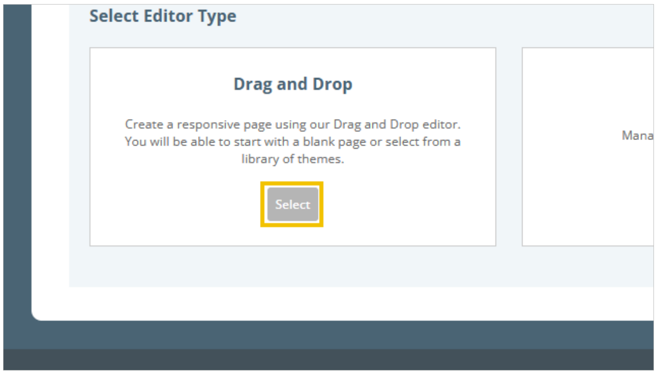
Click on the button **Close**



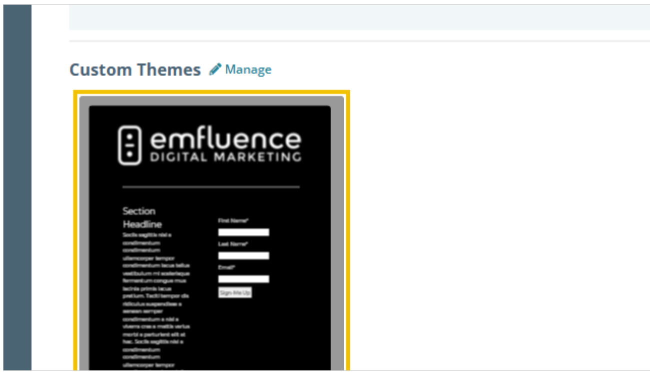
To create a new page using your custom theme, click on **New Page**



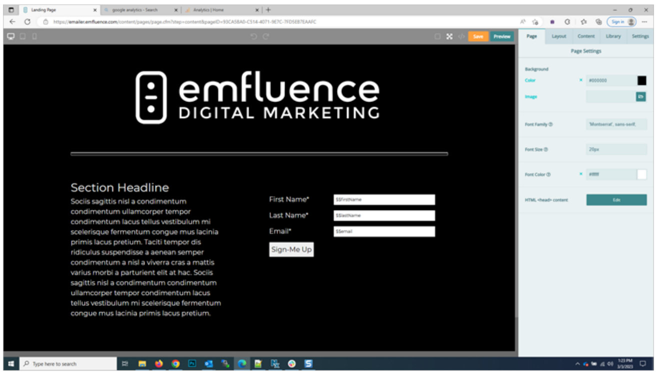
Select a Drag and Drop page



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

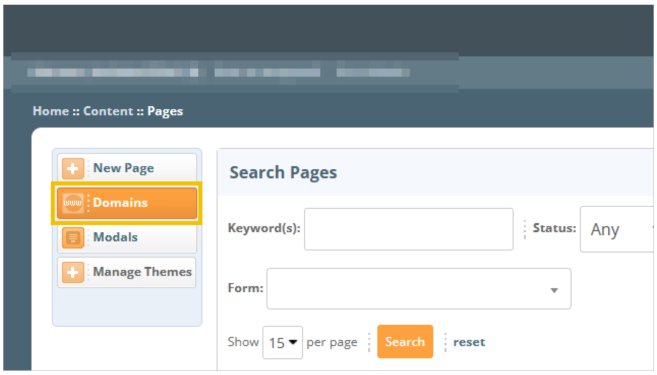


You can now make any edits to your new page without fear of changing the saved theme. If your theme has a form saved into it, you would likely want to swap out a new form as changes made to the existing form would change the form on every page where it exists.

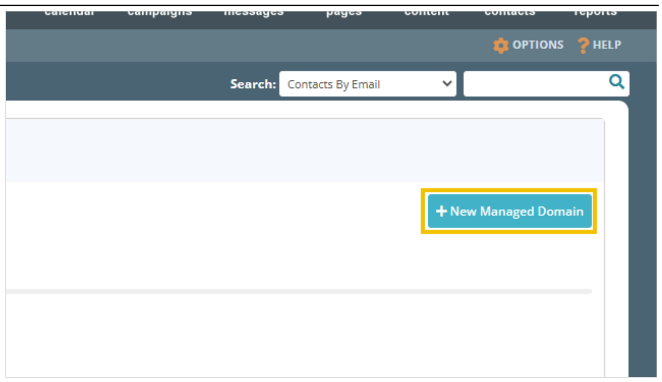


3.4. Landing Page Managed Domains

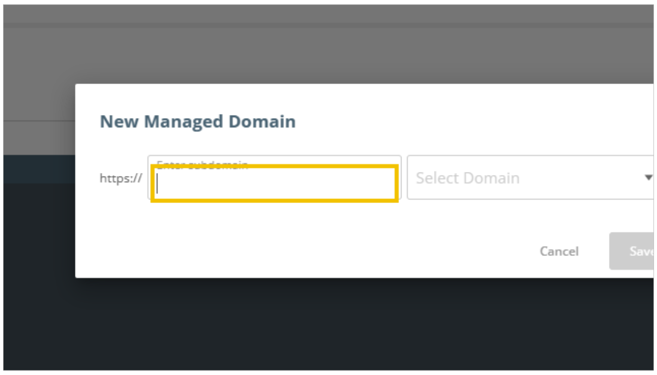
To make the landing pages in your account more branded, you can use emfluence-hosted subdomains. Click on **Domains** to see your existing domains or create new ones.



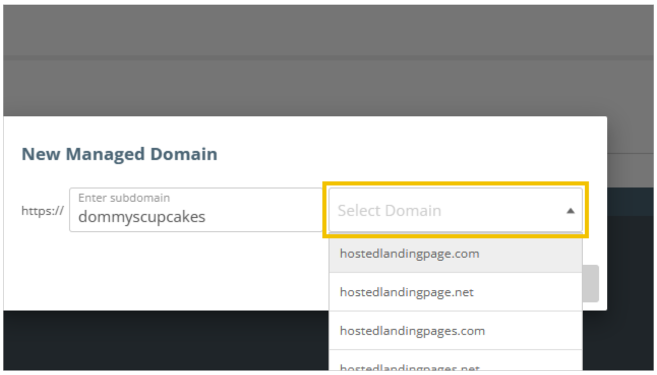
To add a domain, click **New Managed Domain**



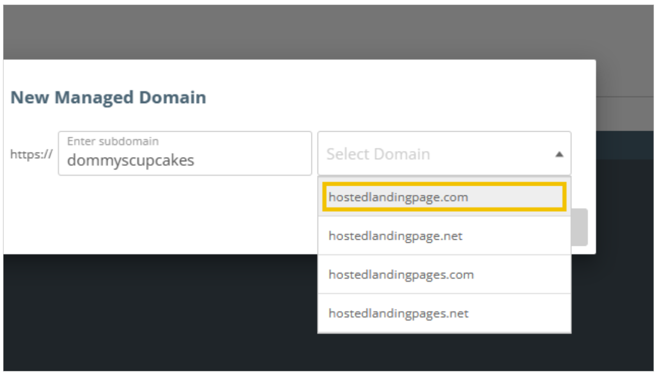
Type the name of your subdomain in the first input field. It should be simple. Avoid spaces, non-alphanumeric characters, etc.



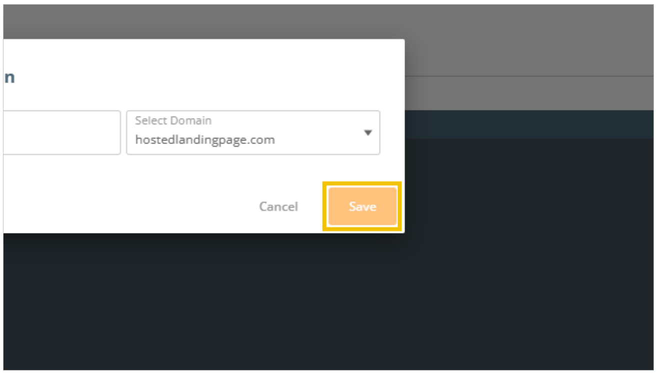
Expand the selection under **Select Domain**, to view the available domains



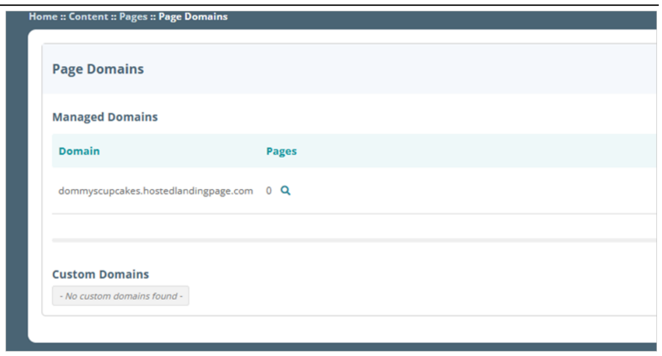
Under Select Domain, select one of the available domains to complete your managed subdomain such as **hostedlandingpage.com**



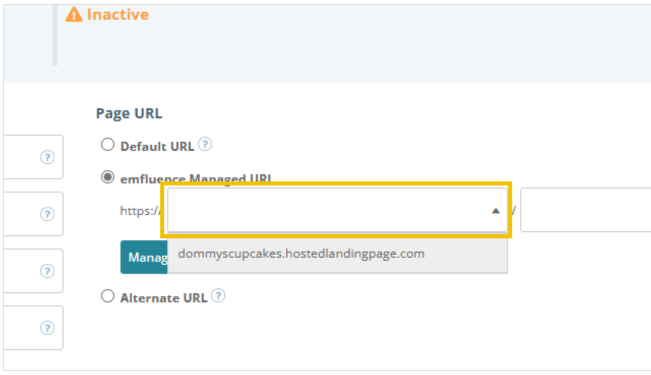
Click to **Save**



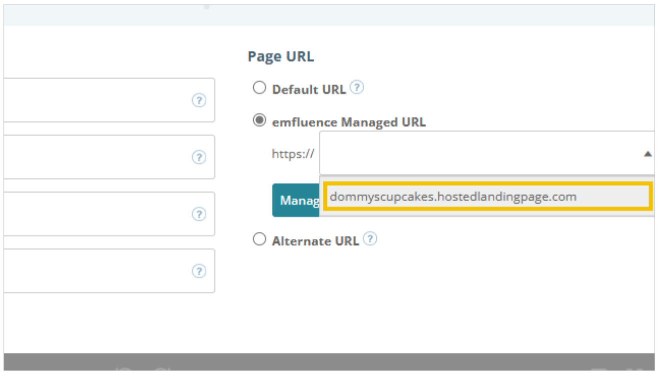
Your emfluence-managed subdomain will now be visible. If you've set up any custom domains (to have fully branded URLs) those will show up in the section below.



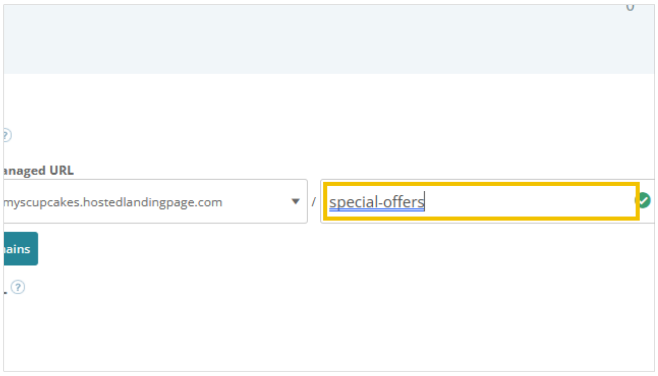
When making a new page, you can now choose your subdomain from the emfluence Managed URL dropdown



Choose your domain from the dropdown

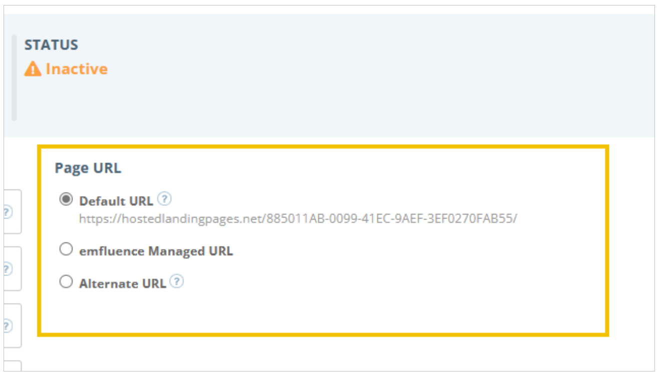


Type to complete the URL with a page name. Avoid spaces, non-alphanumeric characters, or anything else that might disrupt the URL. If the page is available (and not already in use) a green checkmark will appear

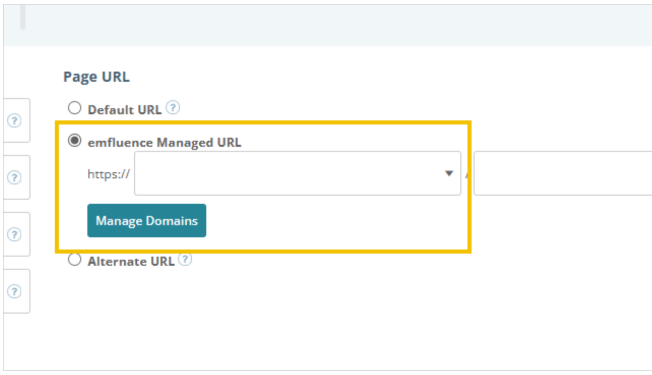


3.5. Landing Page Custom Domains

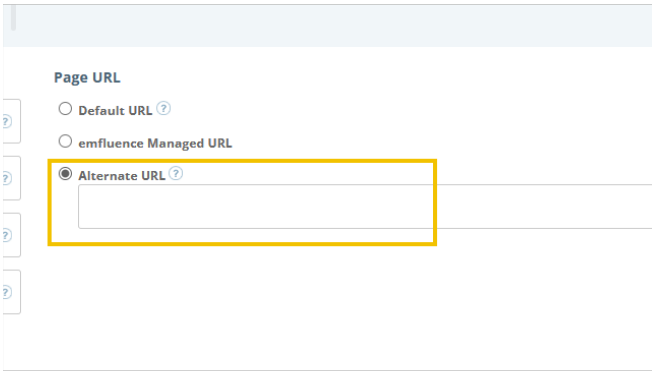
emfluence Landing Pages will be assigned a random URL through a domain emfluence owns. However, there are ways you can make this URL be more branded to your domain.



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.

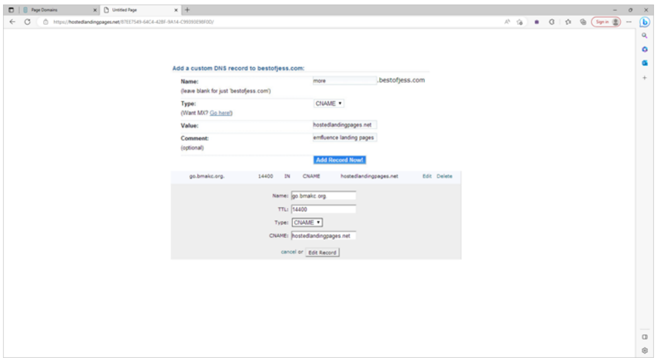


For full control of the URL you can take advantage of the **Alternate URL** option. Unlike a managed subdomain inside of emfluence, this does require someone on your side doing some setup.



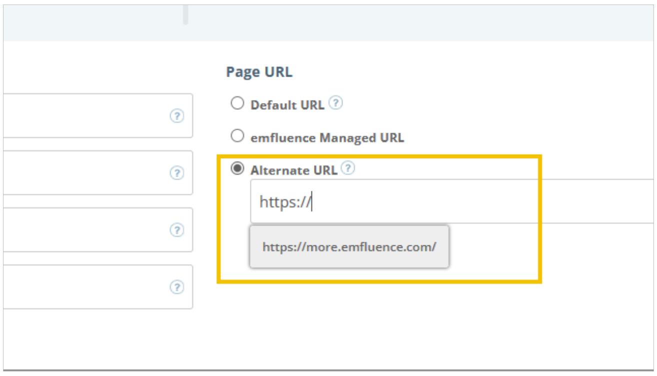
To set up a subdomain on your own website for your emfluence landing pages, you'll need to access the domain records for your site.

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.

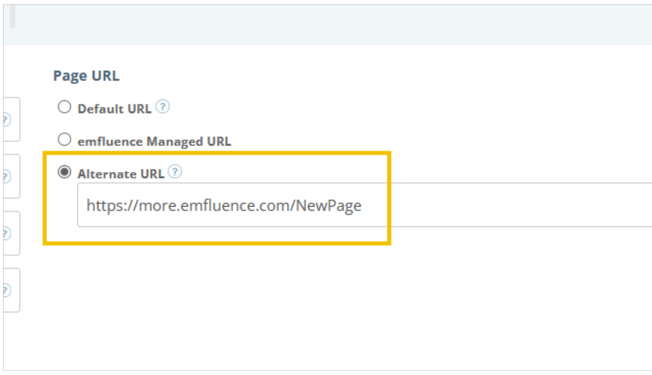


Once a custom domain is saved within your account, when using the Alternate URL option, you will be prompted to choose the saved domain.

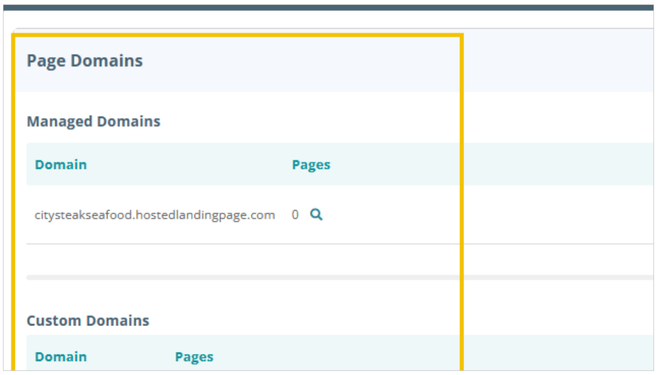
NOTE: Typing a domain that is not properly set-up, or using a custom domain missing the necessary records, will result in a failed URL.



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.

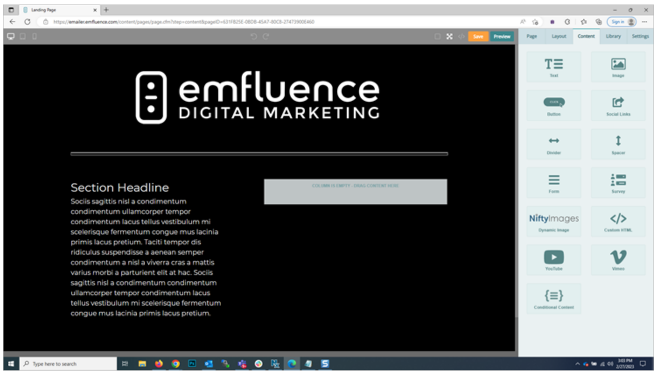


You can find a list of both your managed domains and custom domains in the Page Domains page of the Landing Page section.

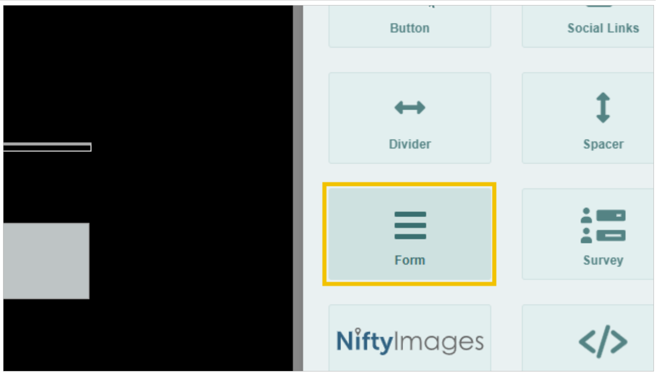


3.6. Add Form to Landing Page

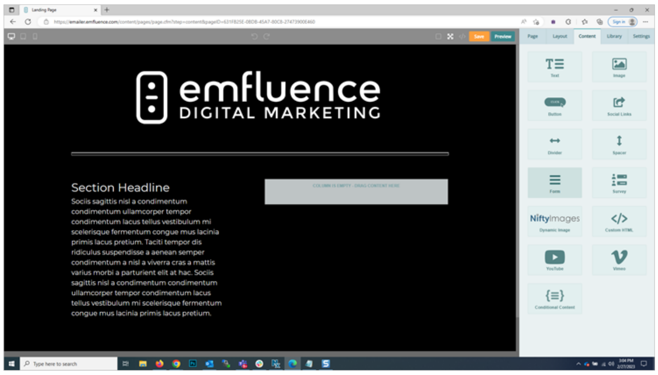
Forms need to be placed within an emfluence landing page. This can be a simple page, where you plan on iframing the content within your website, or can be a more branded standalone page



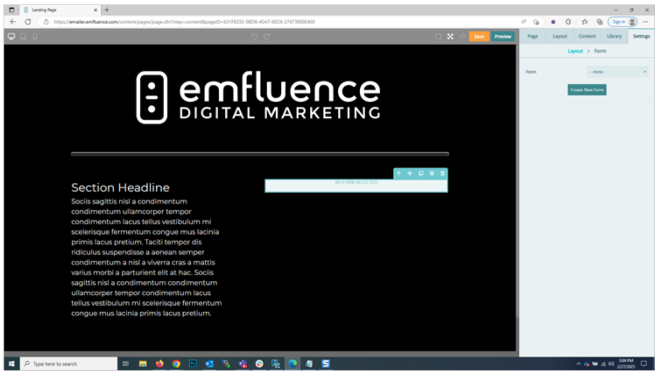
To add a form to a landing page, find **Forms** under the Content menu in the right-sidebar



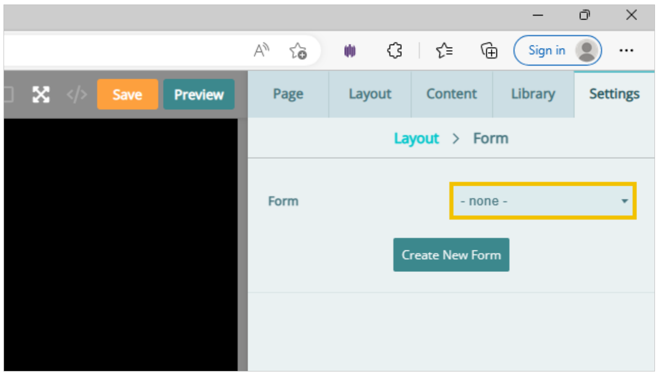
Drag the form over to the spot in your page where you want it to appear, and drop it in



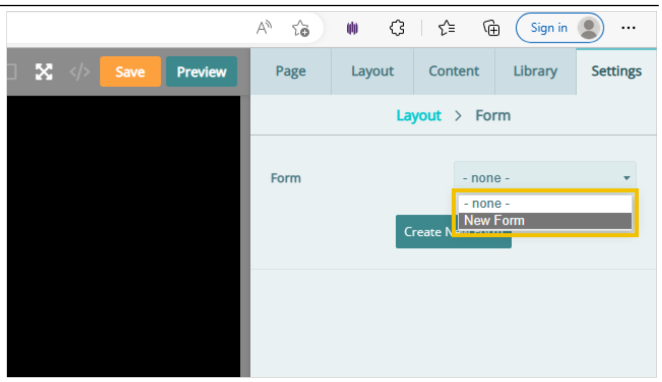
Click your placeholder to select it



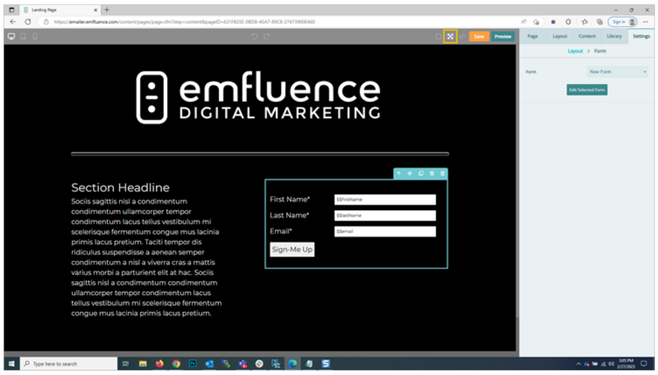
In the Settings, you can either click Create New Form if your form hasn't been created, or to use an existing form, **Select** your form from the dropdown provided



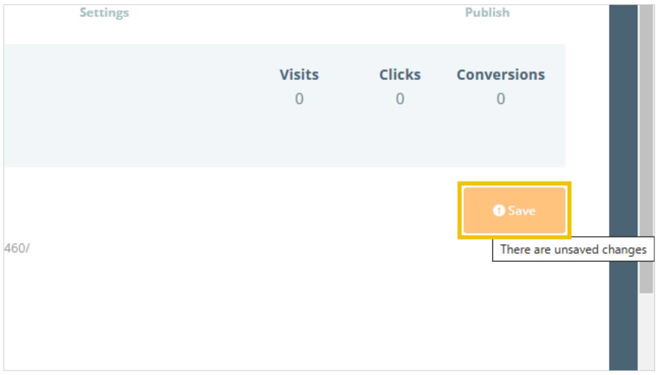
Select the form you want to add from the list



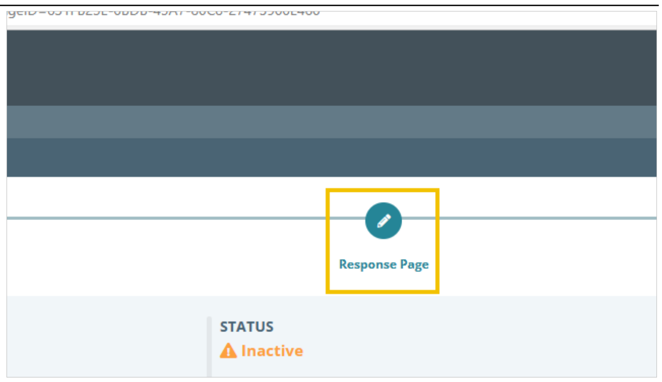
You should now see your form inserted. If your form has no CSS directly applied, the CSS of the page will apply. Any formatting on the form itself will overwrite the page formatting. Click on the **Fullscreen** icon to return to the full page options



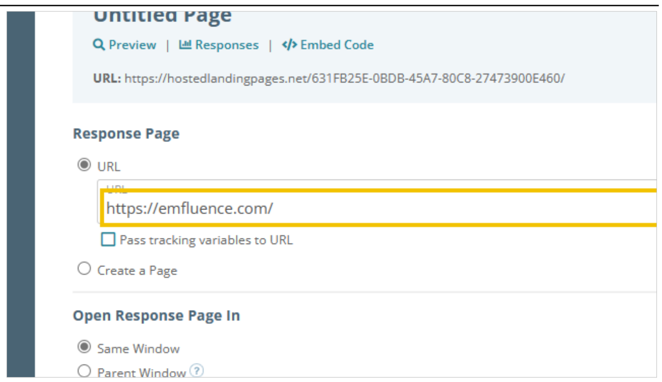
Click **Save**



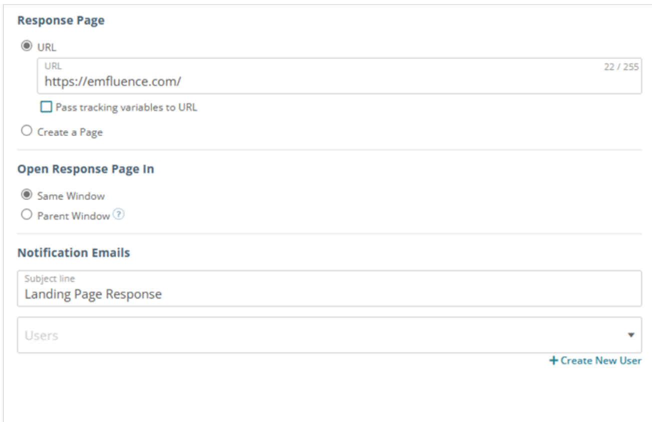
Now that the page with the form has been saved, the Response Page step will be unlocked (you only need to create response pages for pages with forms). Click on **Response Page**



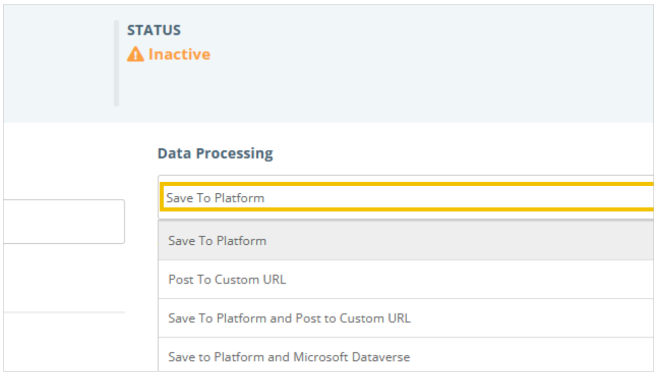
The response page controls where the form will take the contact after they hit submit. You can either send them to an existing URL (such as your website) or you can create a simple thank you page using the page you created as a starting point



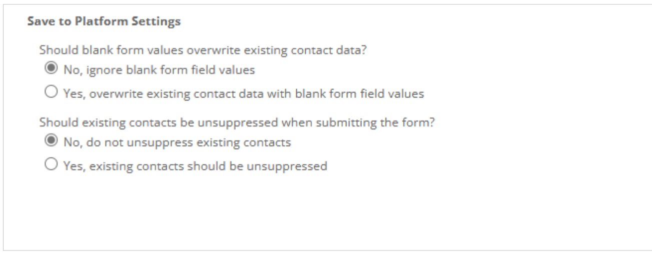
Other options on the response page include where you want the page to open. If you plan on framing the page into an existing page on your website you may want to open in the Parent Window. You can also set up a notification email to notify any user(s) in the platform when a new form entry is made.



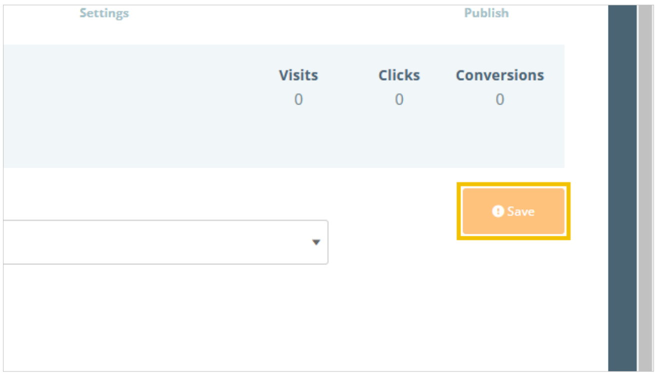
The default option on the form is to Save to Platform. However, you can also post that data to a URL by choosing Save To Platform and Post to Custom URL (you will need to set up a URL to properly handle the data). Or, if you use the emfluence Dataverse connection you can choose to Save to the Platform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



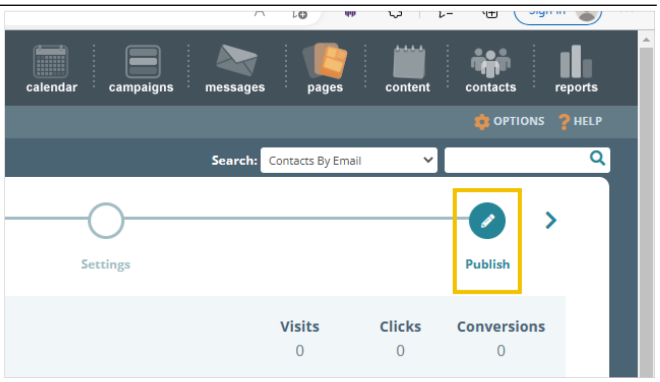
You can also choose whether or not you want blank fields to overwrite data within in emvfluence and if you want a new submission for a suppressed contact to reset their suppression within your account



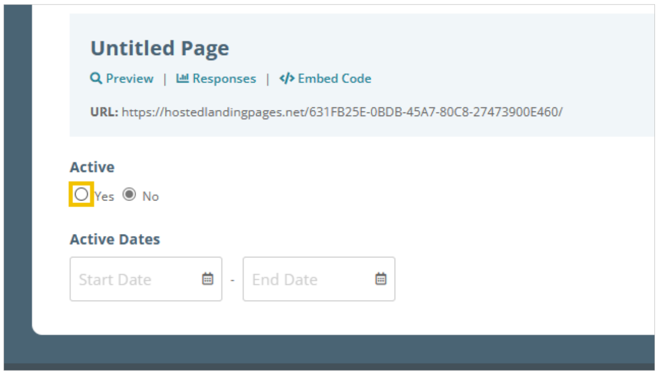
Click to **Save**



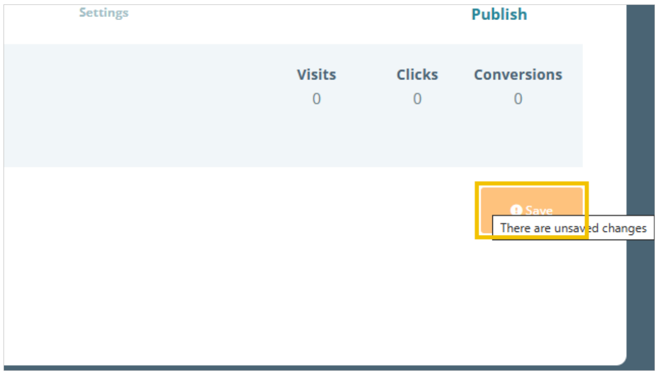
Advance to the **Publish** step



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

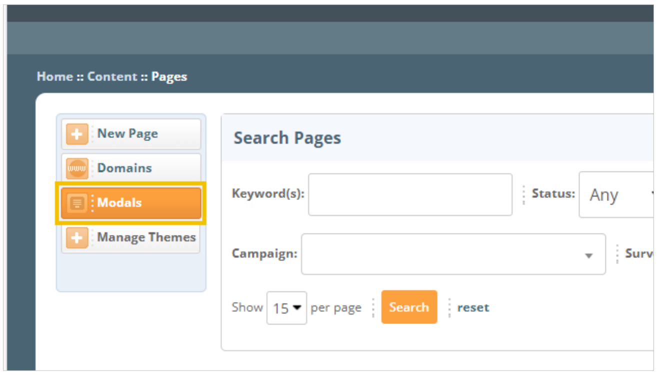


Click **Save**

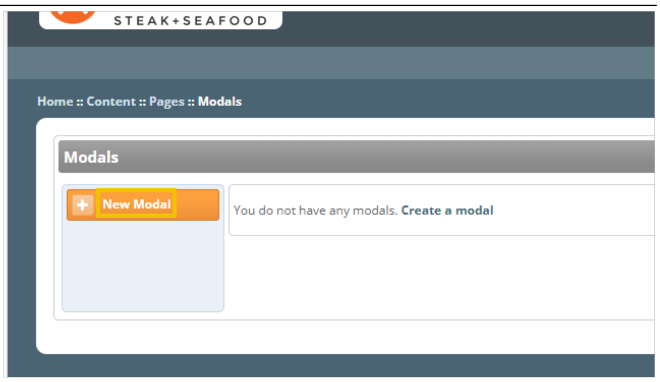


3.7. Modals

Modals can be found in the Pages menu.

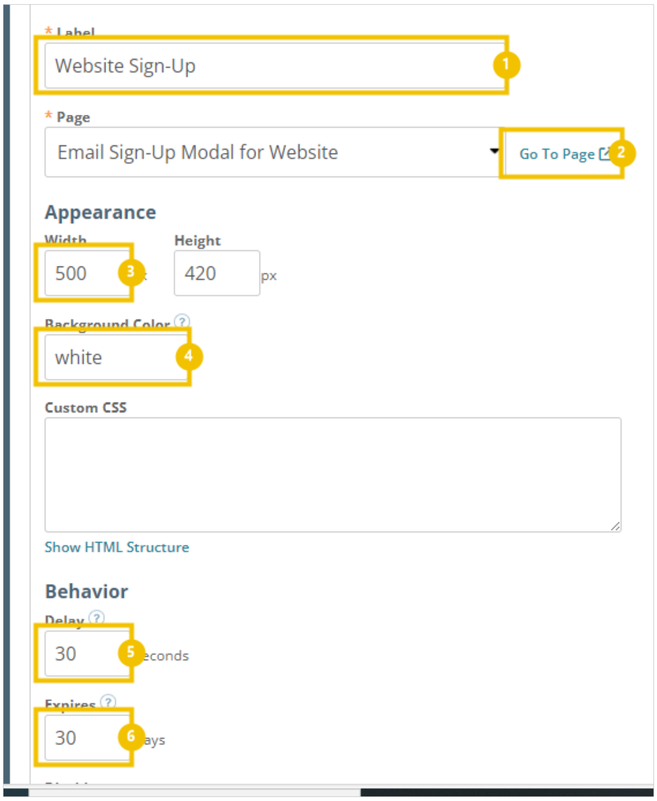


To create a new modal, click on **New Modal**.



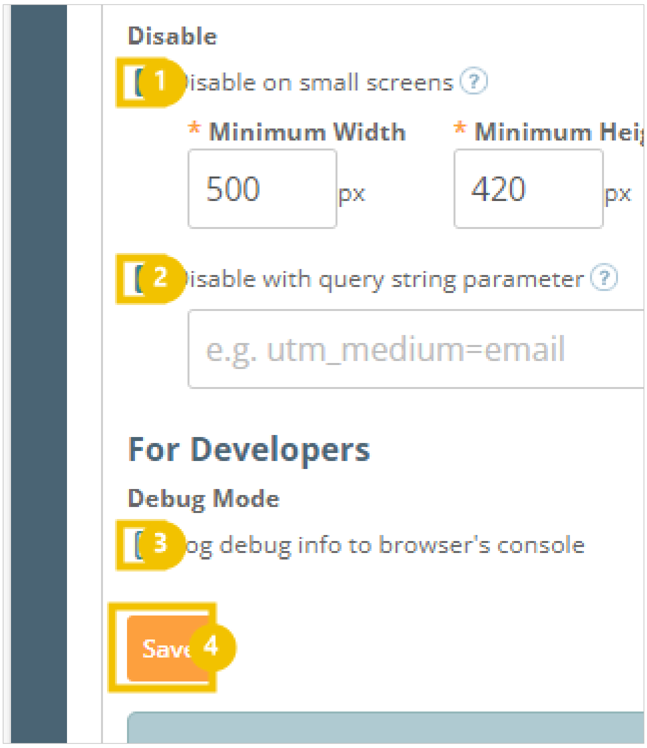
Fill in the necessary details of your modal. emfluence Modals are delay based. If you want a trigger-based modal you can add a landing page's embed code to a third party modal.

1. **Label**: Fill in a friendly name to explain the use of your modal
2. **Page**: From the menu, select the emfluence landing page you want to embed within your modal. The Go To Page option will open that page in another tab to confirm it is the page you want.
3. **Width**: Adjust the width and height for the modal.
4. **Background Color**: You can choose to add a background color to your modal as well as adding custom CSS which will apply outside the embedded page.
5. **Delay**: emfluence Modals are delay-based. Choose how many seconds before the modal will pop up.
6. **Expires**: After someone views the modal, choose how many days before it appears to them again (on the same browser).



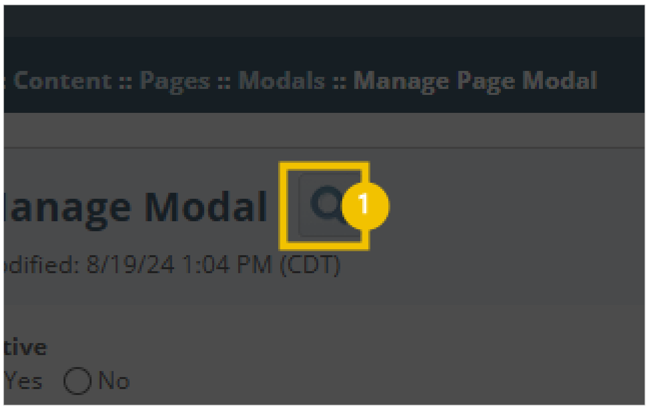
---

1. **Disable on small screens**: You may choose to disable modals on small screens by enforcing a minimum width and height.
2. **Disable with query string parameter**: If you don't want your modal to launch in links containing certain parameters you can include them here.
3. **Log debug info to browser's console**: This can be enabled by developers for debugging purposes. It is unlikely you will use this feature.
4. **Save**: Once you have filled in all information, click Save.

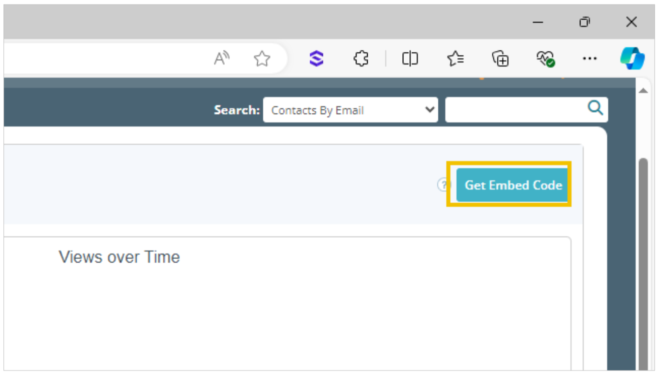


Once saved, the preview button at the top of the screen will launch what the modal will look like based on your specifications.

1. **Preview**: Click to preview your modal. Your modal MUST be saved before the preview mode will function.

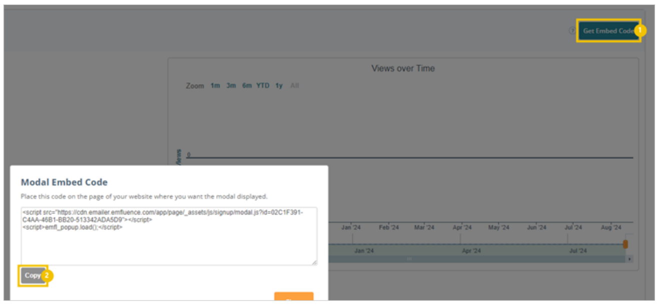


Click on the button **Get Embed Code**



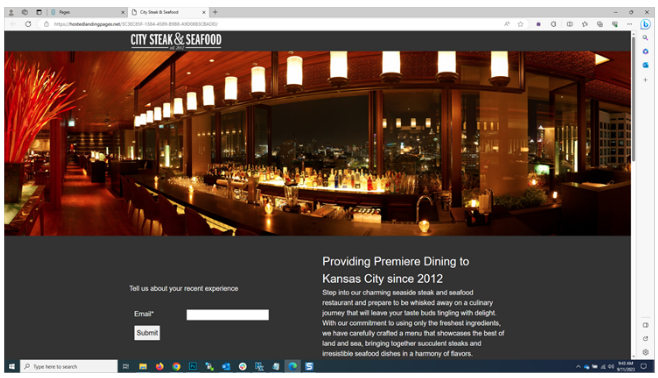
Grab your code to embed it on your website. After embedding, you can make changes to your settings without having to edit this code.

1. **Get Embed Code**: Click to find your embed code
2. **Copy**: Copy the code. This is what will be put on your website. If sharing with someone else who will be implementing the code, put it in a text-only file (such as Notepad) and not Word.



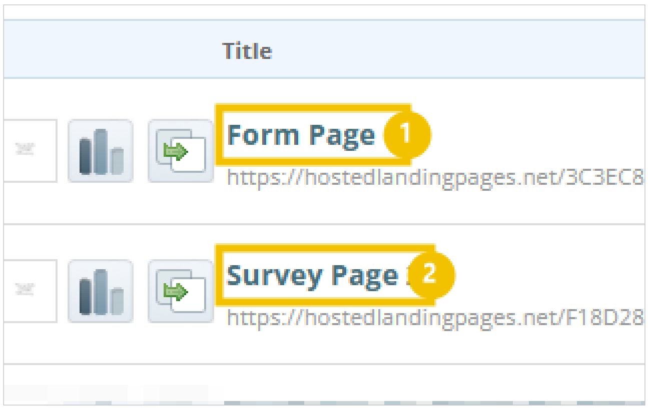
3.8. Progressive Forms

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).

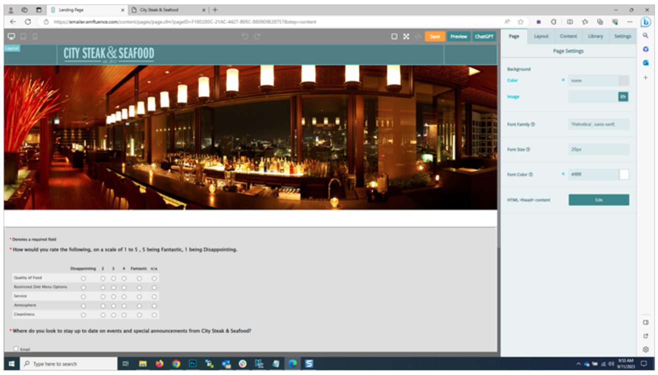


Create the separate pages with forms and surveys. Then you will connect them through the form response page options.

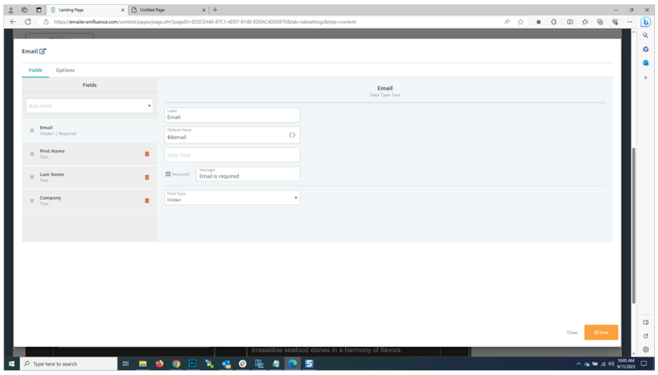
1. **First Page**: Your first page with your initial form.
2. **Second Page**: Your second page with an additional form or survey.



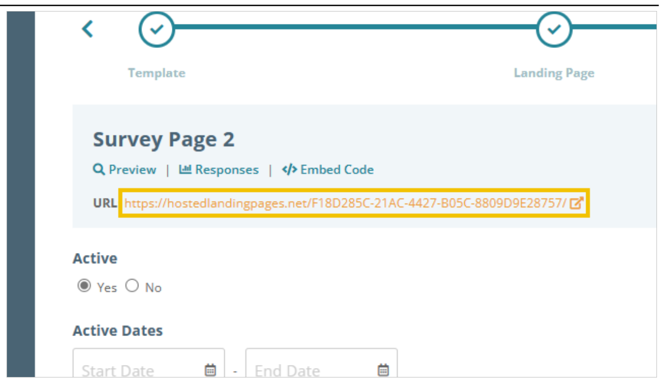
Start with building your final page in your series.



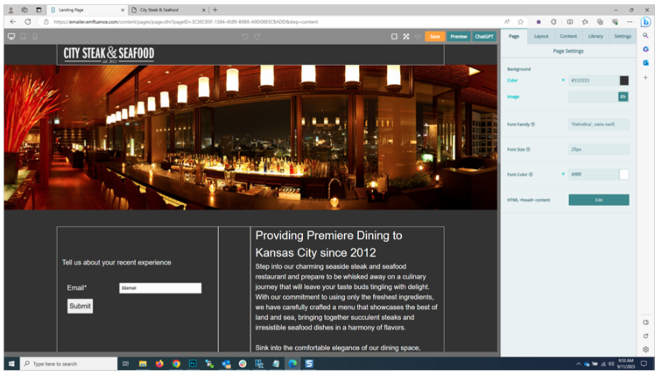
If you are moving from form 1 to form 2, you still need email data to connect the two entries. However, email does not need to appear on the second form. On your seccond form, make the required email field a Hidden field (whose value will be passed from the form on page 1).



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

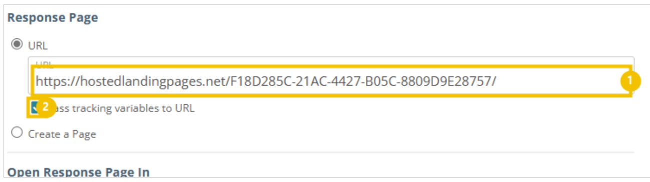


Create your initial page with your form.

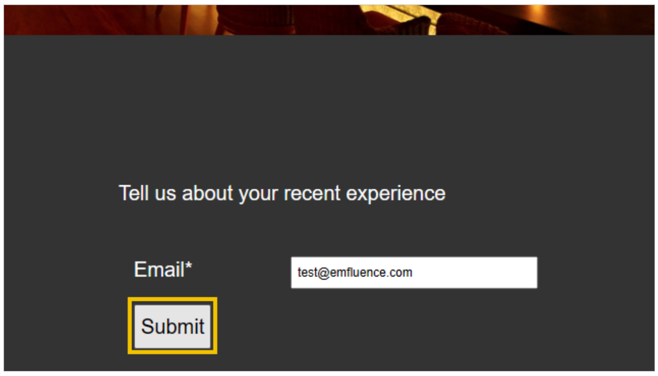


Paste in the URL from your second page as the URL for your response page. Don't forget to also check the box to pass content on to the new page.

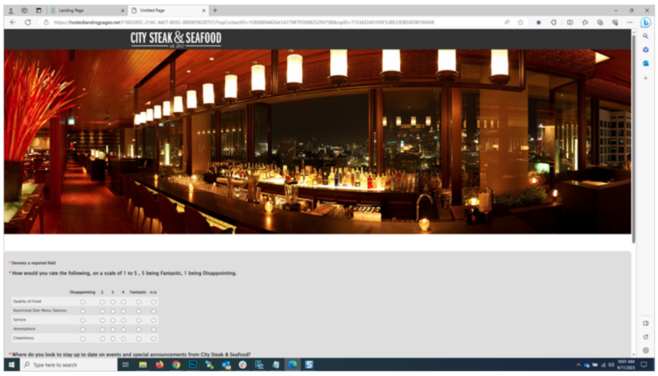
1. **Second Page URL**: Paste the URL for your second page under the URL option for your response page.
2. **Pass tracking variables to URL**: Check the box to pass tracking variables from your initial page to your second page.



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



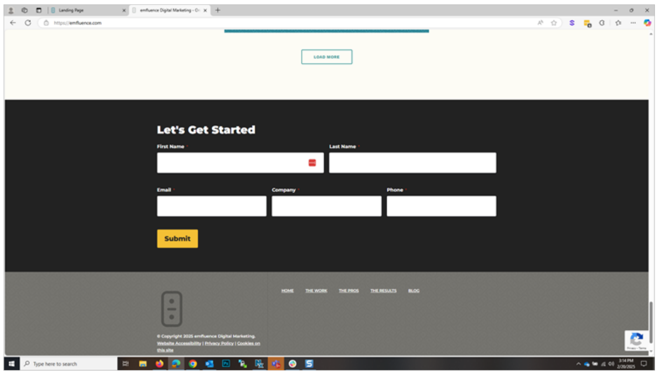
Then fill out your form and/or survey on the second page and you can confirm your information saved correctly.



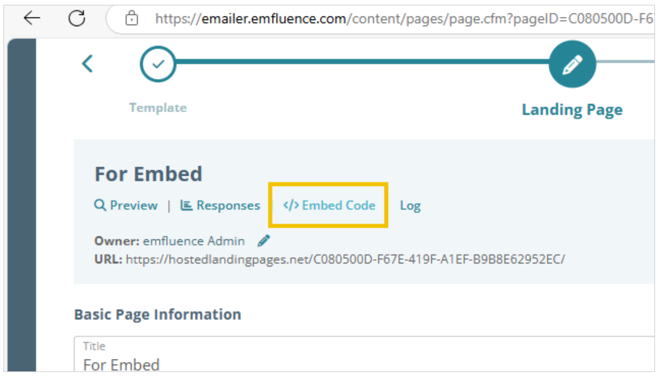
3.9. Embed on your Website

3.9.1. Setting up the Embed Code

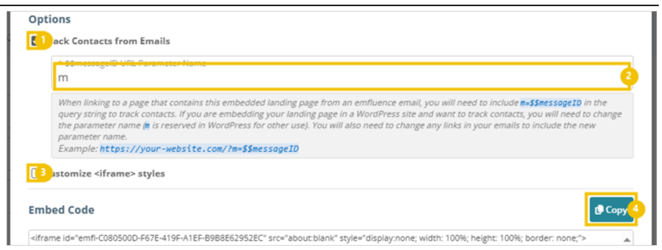
Rather than using a freestanding landing page, you may choose to embed a landing page with a form into your website.



After making your landing page and form, on the Landing Page step, click **Embed Code** to get the code you will need in order to embed the content. The page may just be the form, and nothing else, or you might choose to have text, images, etc. as well. Whatever is included in the page will be responsive content when you embed it into your webpage.

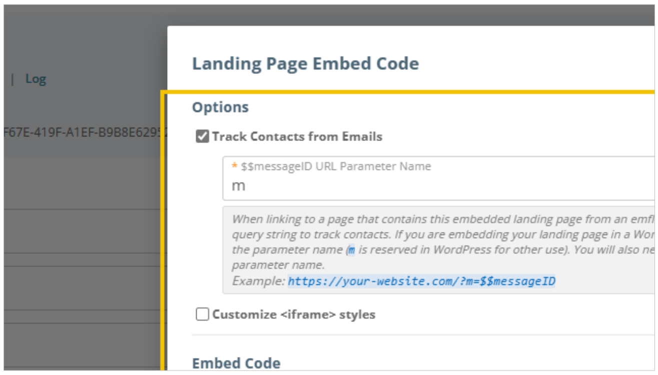


In the pop-up you will find the code needed to embed on the page where you want your form and landing page to appear. The code is made to be responsive, allowing the content to fill the container on your page where you will add the iframe.



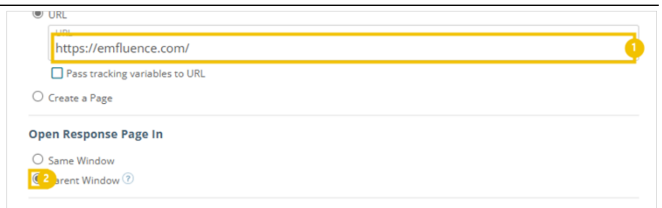
1. **Track Contacts from Emails**: On a freestanding landing page tracking will occur naturally when the contact is known. However, choosing to embed the page means extra steps will be needed to track a contact from an email onto the page where the form and page are embedded.
2. **Tracking variable**: When pushing contacts from an emfluence email to a page where the landing page is embedded, you will need to include the code at the end of the URL. The first piece of this is the variable. By default emfluence uses "m" (for message). However, you can change this to be any variable as long as you are consistent when sharing the link in emails.
3. **Customize iframe styles**: Click to customize the styles of your iframe
4. **Copy**: Copy the embed code. If you have changed the variable at the top the code will change for you before you copy it.

Copy the embed code and paste it into the website. If you are handing off the code for someone else to add it to your website, make sure you save the file in in a non-formated text file (do not save it in Word).



On the response page. You can choose to reload information inside the frame after submission or push the contact to a new page.

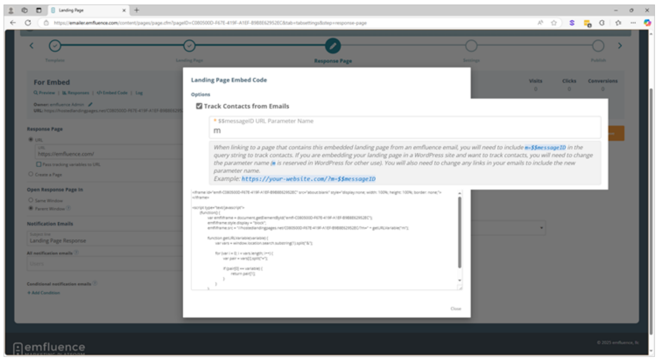
1. **URL**: If you are going to push the contact to a new page after submission, paste the URL where you want them to be redirected.
2. **Parent Window**: If you are redirecting the contact to a different URL, and don't want that URL to be loaded within the iframe, make sure to choose to open the response page in the Parent Window.



3.9.2. Linking to the page in an email

When linking to a page that contains this embedded landing page from an emfluence email, you will need to include m=$$messageID in the query string to track contacts.
Example: https://your-website.com/?m=$$messageID

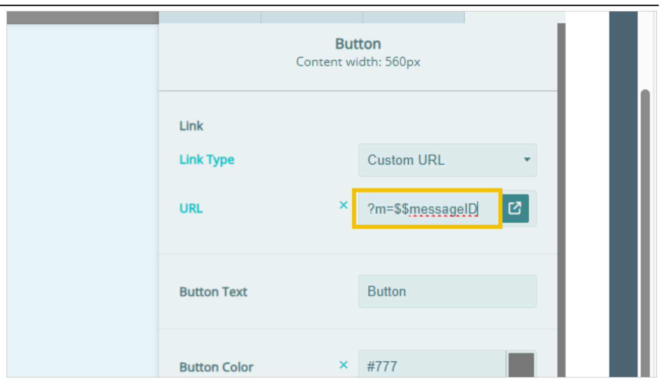
NOTE: If you changed your variable in your embed code, to use something other than the default "m" variable, you must remember to use the same variable in your links.



When composing your email and adding your link to a button, text, or behind an image, paste the page's URL and remember to add the m=$$messageID at the end of the URL. This will track the contact through the page into the embed.

Example:
https://emfluence.com/?m=$$messageID

Reminder, the variable used in your embed must match the variable used in your link.



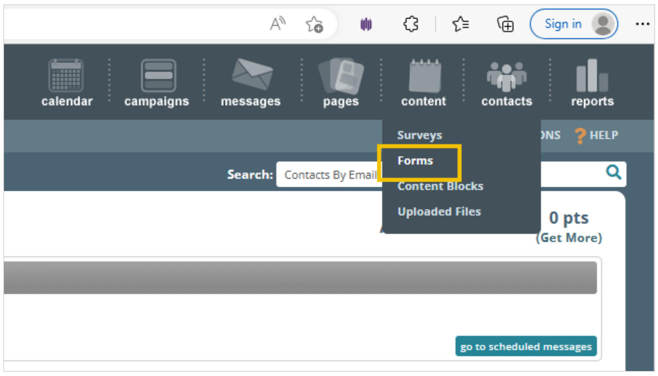
3.9.3. Troubleshooting

My visits aren't being tracked?
 * Are you remembering to add the variable code at the end of each URL?
 * Is the variable you are using the same as what was embeded on the page?
 * Do you have a WordPress website? WordPress uses the "m" variable for different purpose which could break the relationship inside the frame. When embedding inside WordPress we suggest using a different variable such as "emfl" or one of your choice, remembering you must use that same variable when sharing the link.

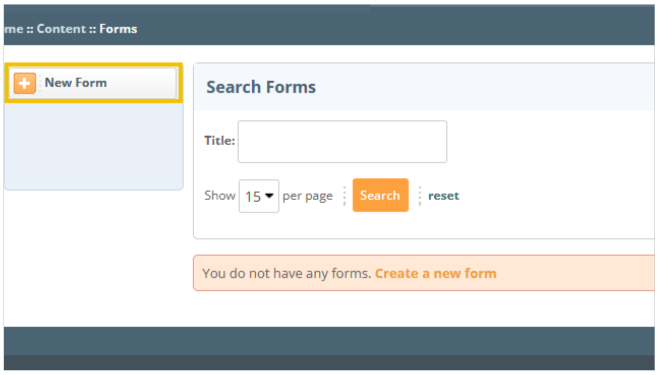
4. Forms

4.1. Create a Form

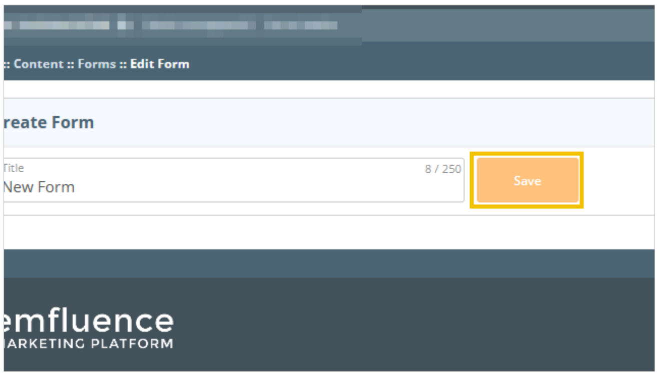
In the top menu, hover over **Content** and click on the link **Forms**



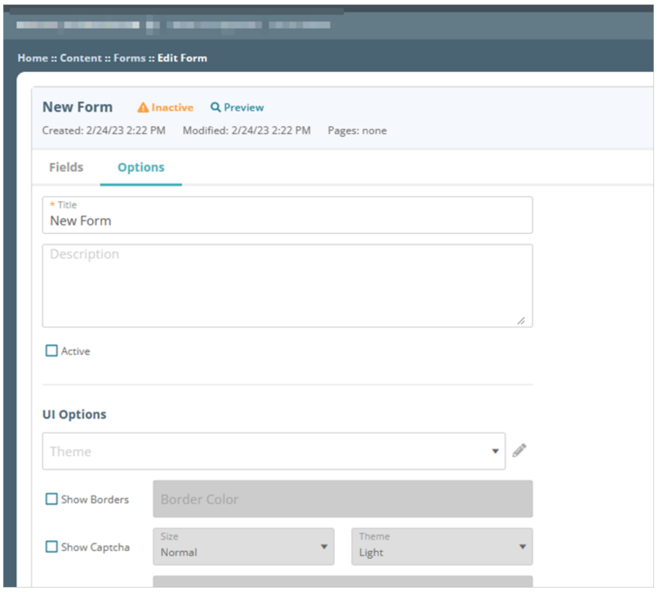
Click **New form**



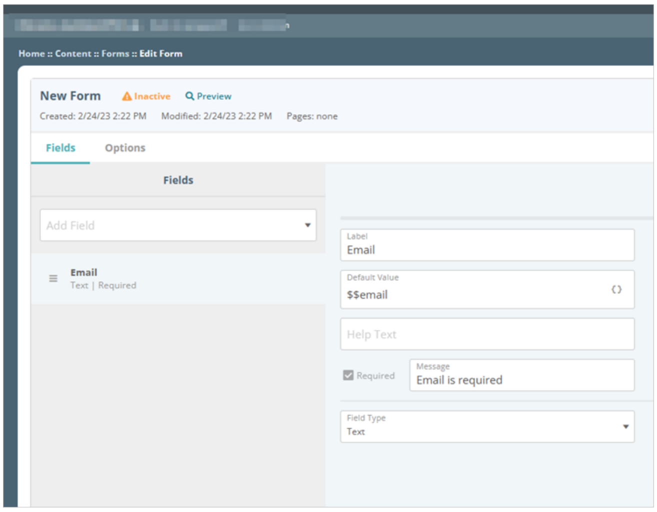
Type the name of your new form and click on the button **Save**



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.

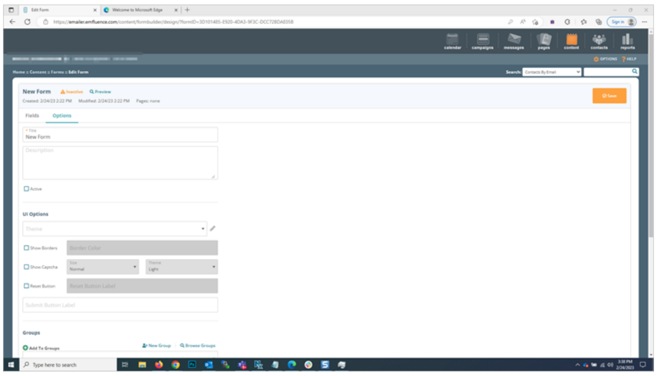


On the Fields tab you can add and rearrange fields you want to capture data from your form.

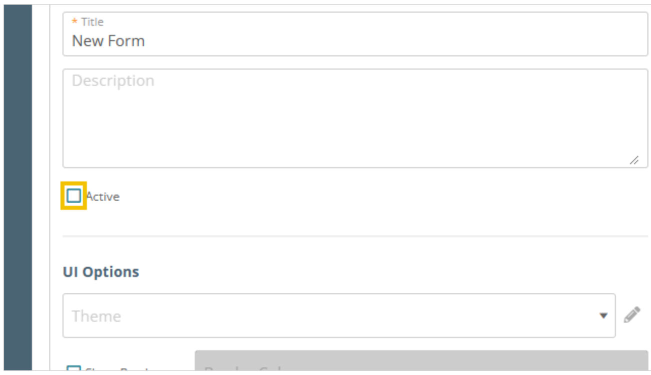


4.2. Form Options Menu

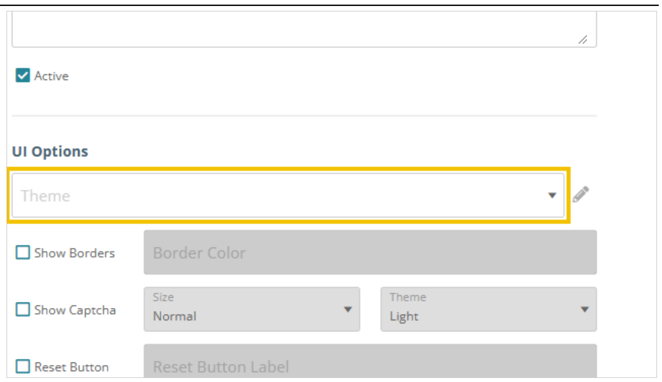
On the Options menu you will be able to activate and choose from several optional settings for your form.



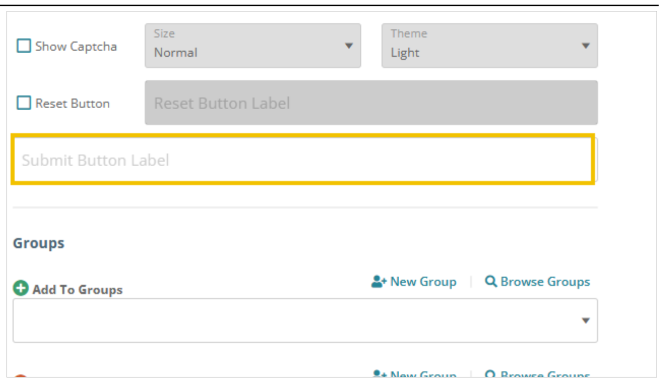
Like surveys and landing pages, forms are inactive by default. To make a form active, check the box next to **Active**.



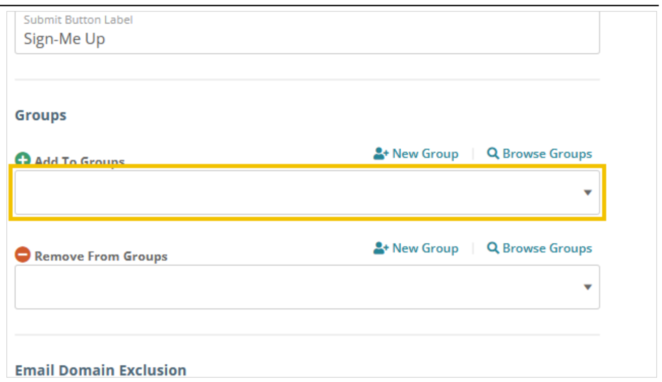
By default, your form will have minimal formatting and will accept the formatting of the landing page in which you add it. If you would prefer to add formatting directly on the form (which will overwrite your landing page formatting) you can choose to load a preset **Theme** or add your own **CSS.**



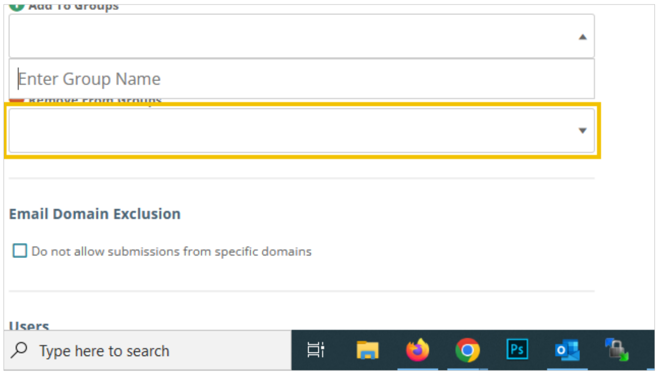
By default your submit button will show as Submit. If you wish, you can customize the wording of a button to any word or phrase that fits within the character limit by typing in the **Submit Button Label**



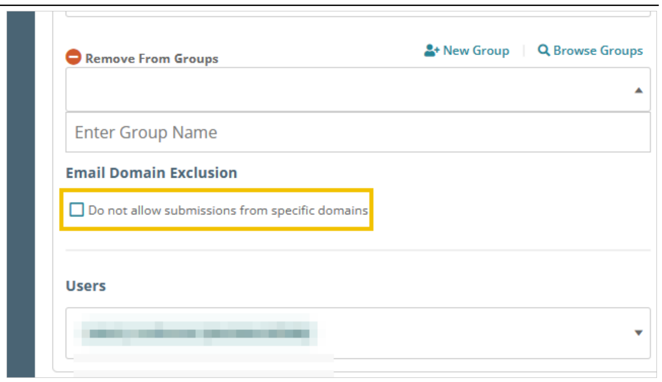
Forms can feed one or more groups. It's a good idea to have a group just for your form submitters, and you may also wish to add them to other lists in your account. If the group already exists, you can start typing the name in the **Add to Groups** field and choose it from the list, or find it in the 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



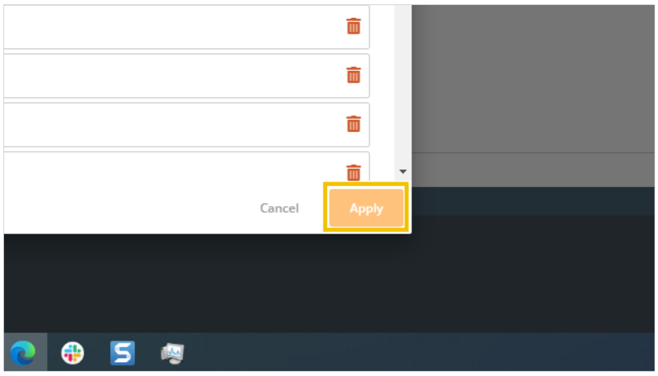
Optionally, you may also want to remove a contact from a different group when they fill out your form. This would be useful in terms of a survey group where you would add contacts to a survey completed group and remove them from an initial group allowing you to resend to that initial group without worrying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



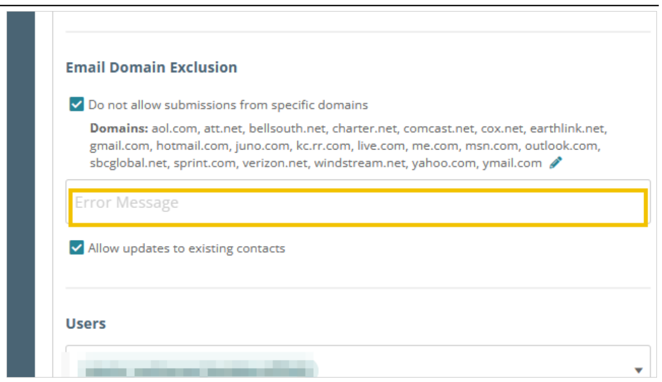
You may wish to limit which domains can be added (to either force contacts to use a business address or prevent competitor domains from signing up for you content. To do so, click on the label **Do not allow submissions from specific domains**



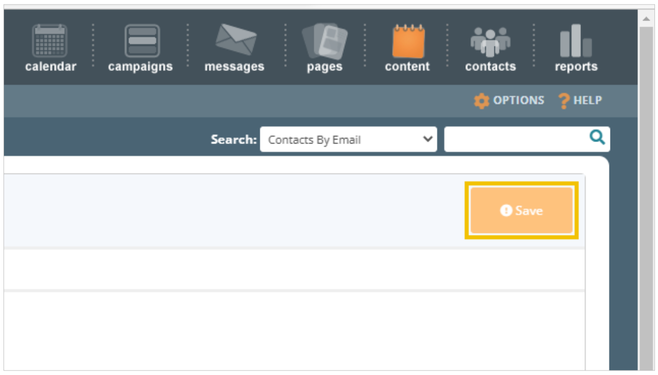
You can choose from the list of premade consumer domains, add your own, or mix and match. When finished, click on the button **Apply**



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

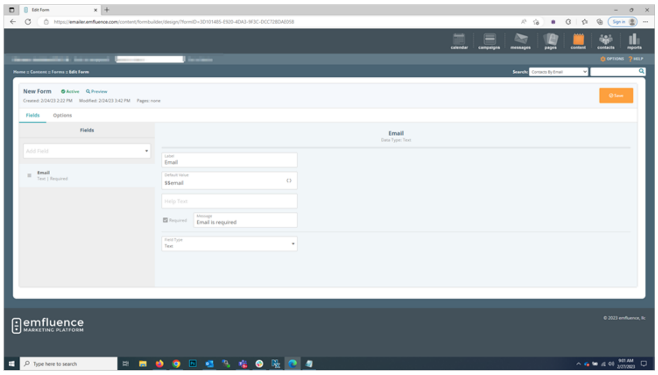


When you are finished setting your options, click on the button **Save**

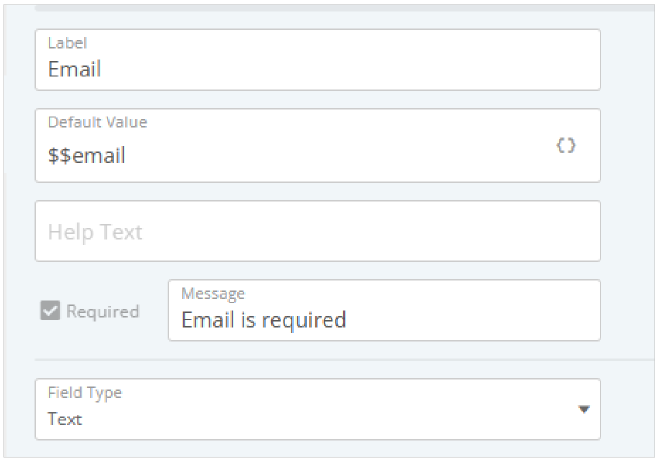


4.3. Setting Form Fields

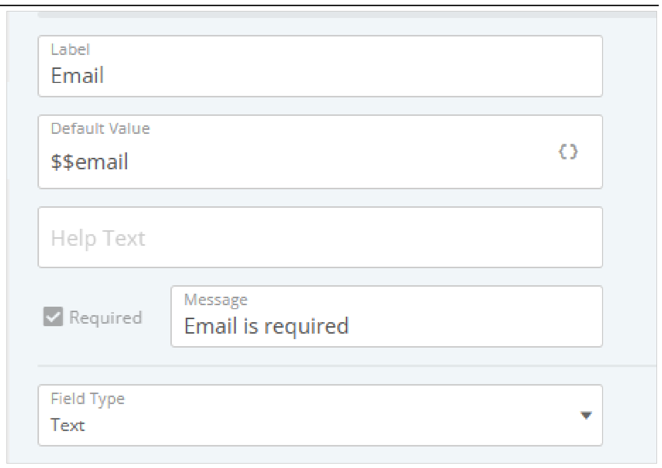
On the Fields tab, you can choose which emfluence form fields you wish to capture on your form



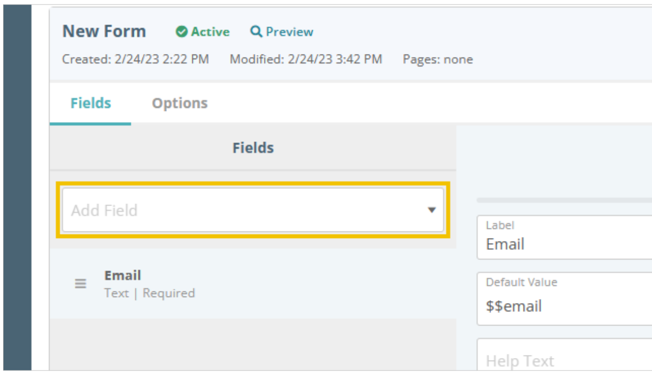
Email will be preselected on your form as it is required to save a contact within the emfluence Marketing Platform



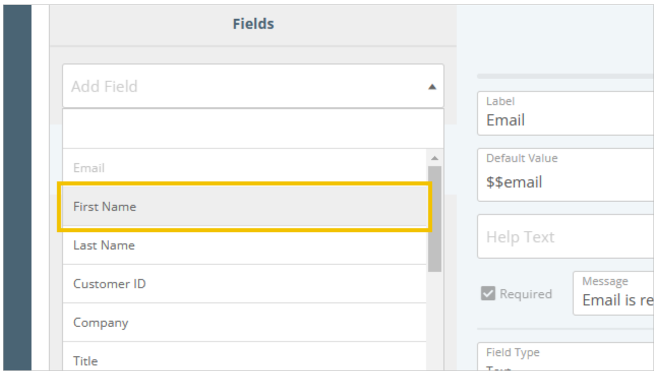
The Label name is what will be shown on the form field. Help Text can be added to explain the information you are looking for. The default value can be blank, have a static value, or use a variable. The default is to use a variable so if a known contact hits that form their value will be shown automatically



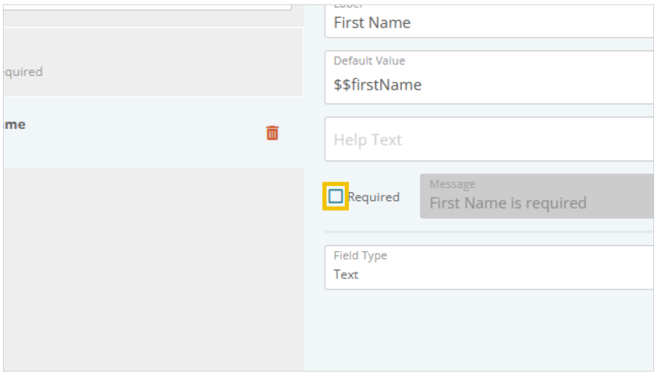
You can add other fields to the form, one at a time, by clicking on **Add Field**



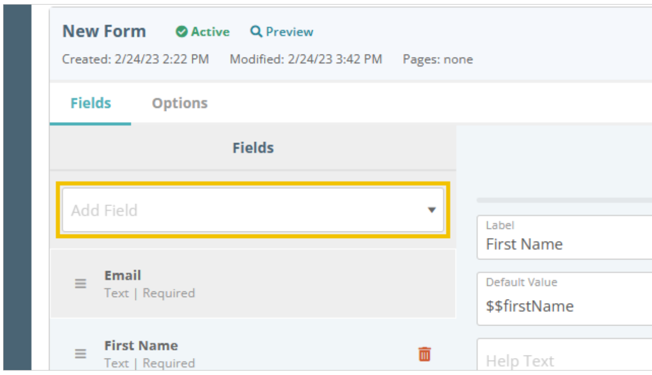
To add a standard field such as First Name, find the field in the dropdown and click on **First Name**



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**

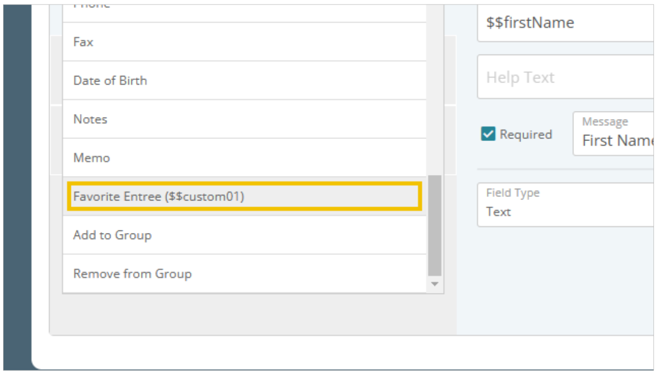


You can add other fields in the same manner through the dropdown. Standard fields will show up at the top of your list with custom fields showing near the bottom

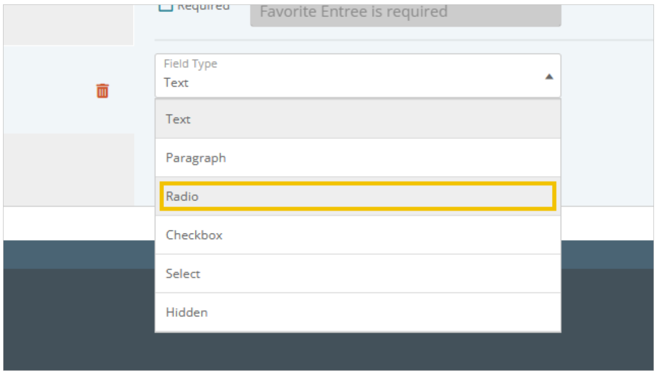


To reorder fields, put your mouse over the three-line menu for that field and **Drag** it above or below other fields

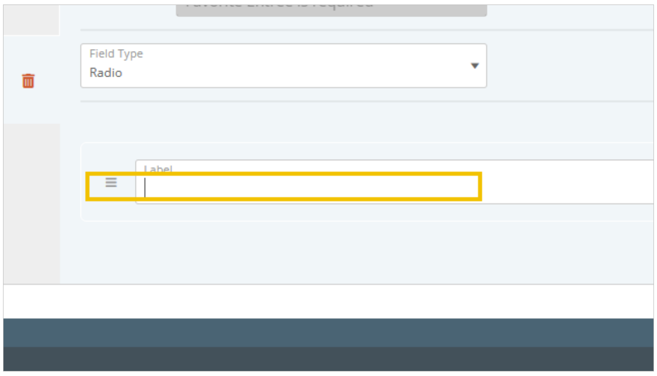
To add custom fields, scroll to the button and find the field you wish to add. As with standard fields, default choices will appear. Click on the **custom 1 field**



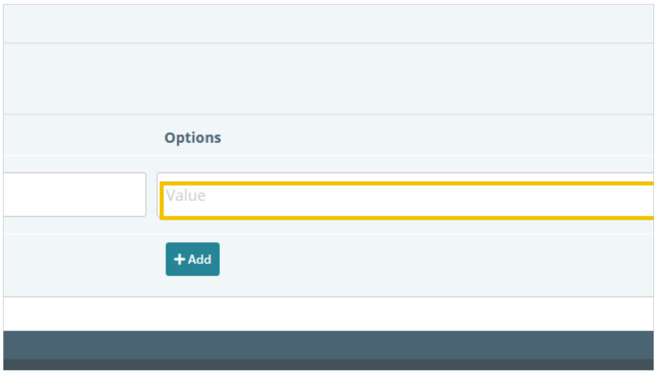
There are multiple types for the field to be show in. Text allows the form taker to write in a response. Paragraph is a larger write-in field. Radio, Checkbox, and Select offer a predetermined list of values that the form taker can choose from. Click on **Radio**



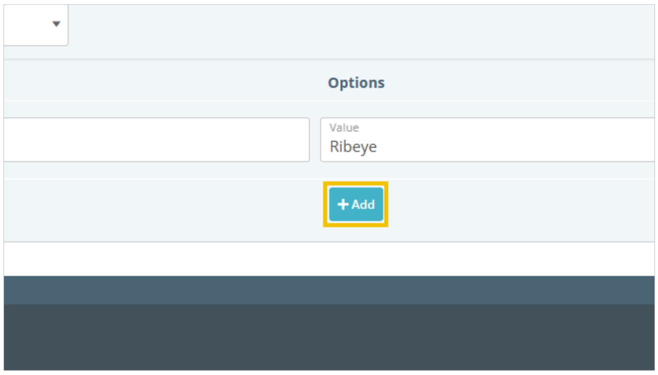
Type or write the name of the **Label** you want to show on the form



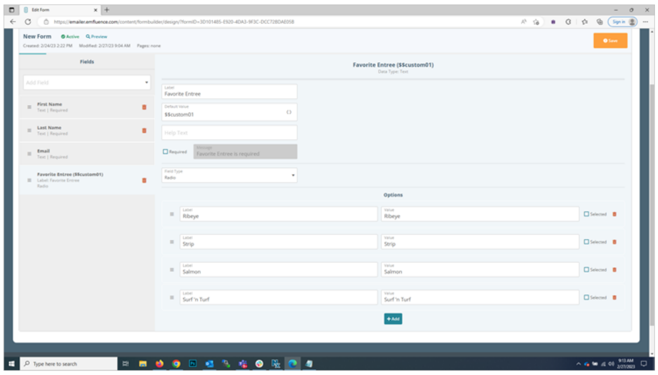
When you click into the Value field it will pre-add your Label. However, you can change your value to be anything. The value is what will be saved to that field on the contact record. For example if you were listing locations, you might want a friendly name in the Label but perhaps a store number in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



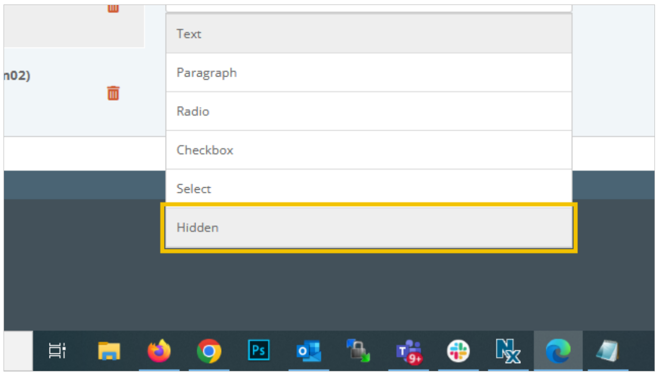
To add more choices, click on the button **Add**



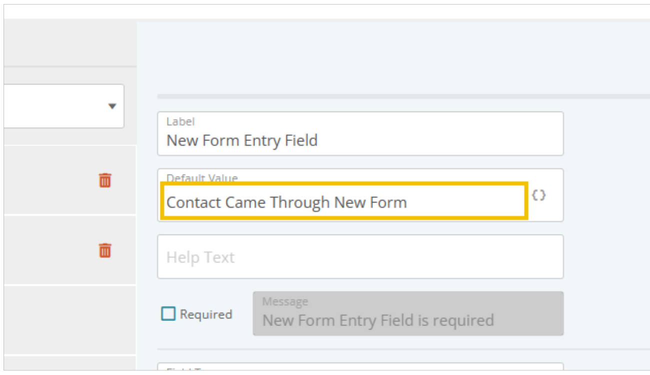
You can add multiple choices for this field. Provide a Label and Value for each one



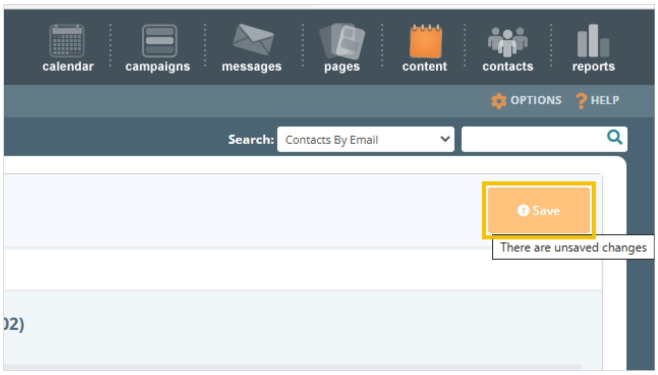
There is another type of field on a form called Hidden Field. This will not show up on form, but will be filled in behind-the-scenes with a value you set. To make a field hidden, click on **Hidden**



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**

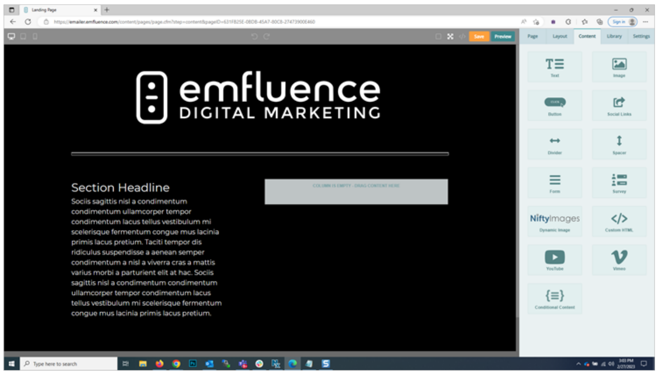


Conclude by clicking the **Save** button

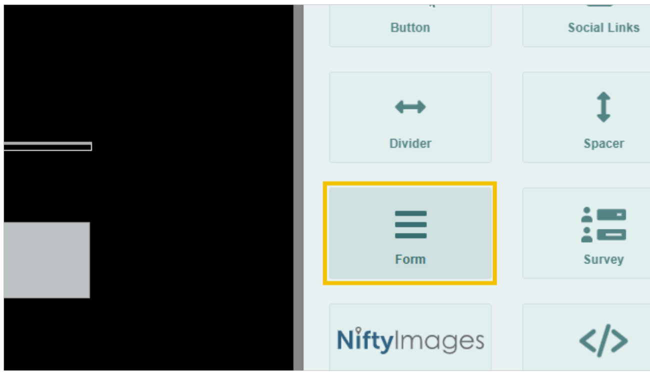


4.4. Add Form to Landing Page

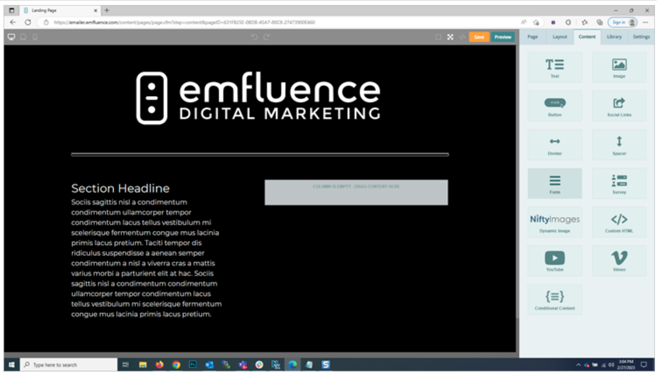
Forms need to be placed within an emfluence landing page. This can be a simple page, where you plan on iframing the content within your website, or can be a more branded standalone page



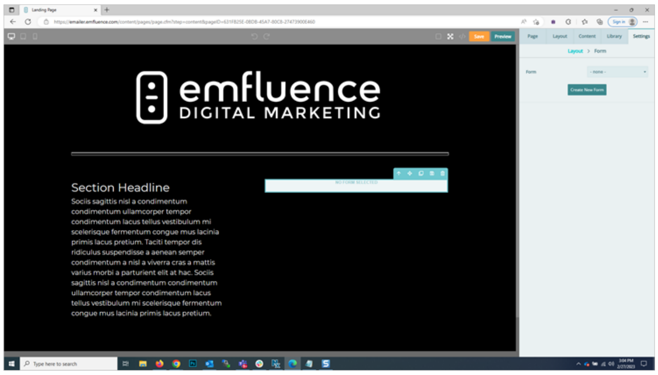
To add a form to a landing page, find **Forms** under the Content menu in the right-sidebar



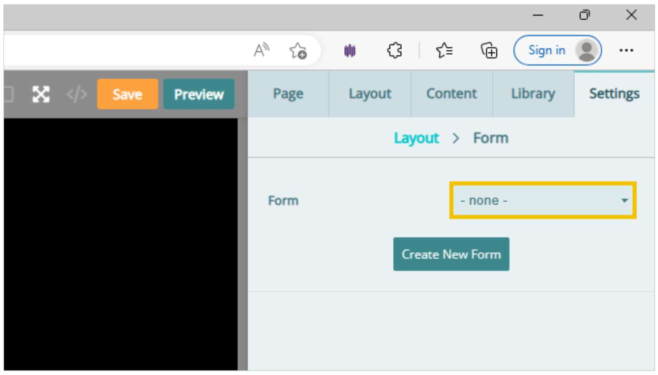
Drag the form over to the spot in your page where you want it to appear, and drop it in



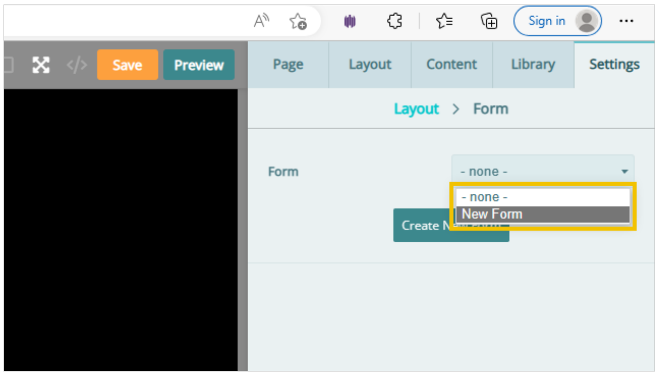
Click your placeholder to select it



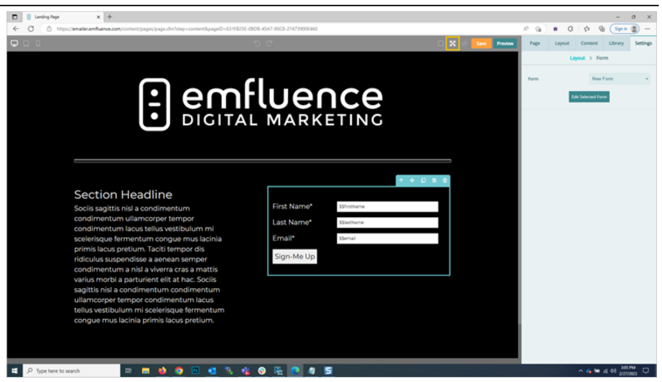
In the Settings, you can either click Create New Form if your form hasn't been created, or to use an existing form, **Select** your form from the dropdown provided



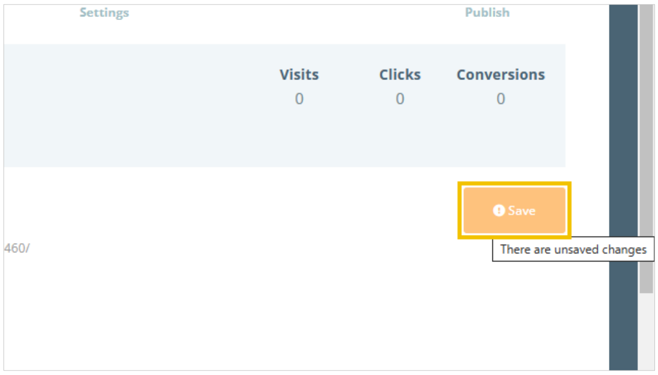
Select the form you want to add from the list



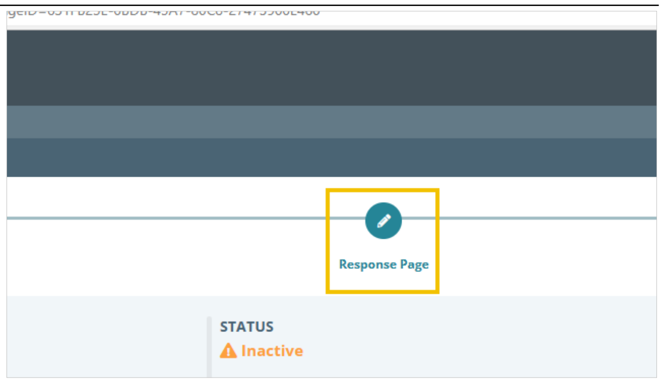
You should now see your form inserted. If your form has no CSS directly applied, the CSS of the page will apply. Any formatting on the form itself will overwrite the page formatting. Click on the **Fullscreen** icon to return to the full page options



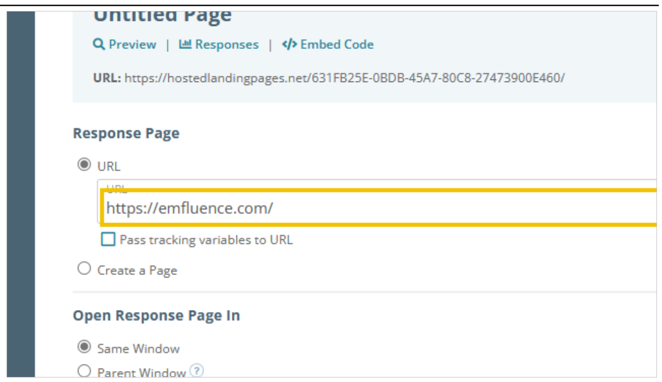
Click **Save**



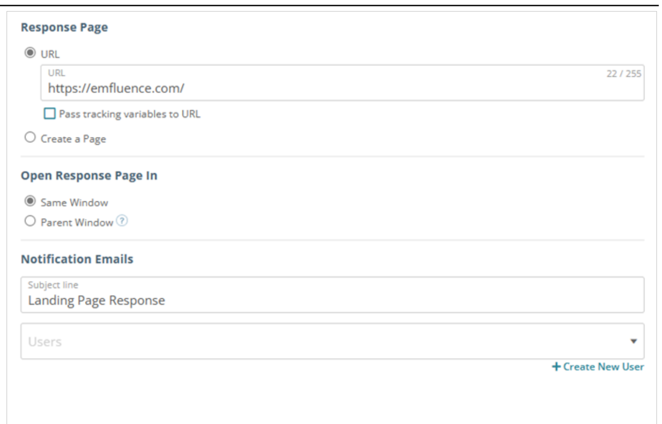
Now that the page with the form has been saved, the Response Page step will be unlocked (you only need to create response pages for pages with forms). Click on **Response Page**



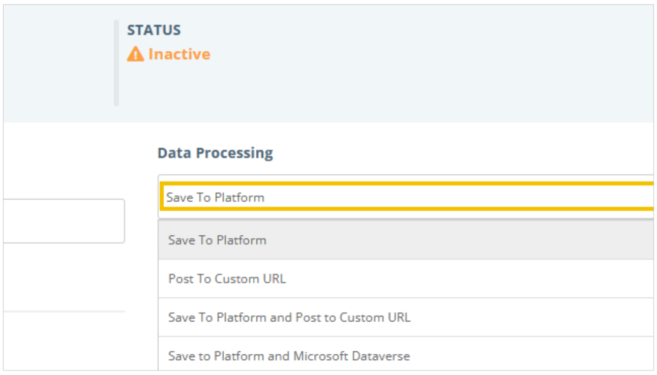
The response page controls where the form will take the contact after they hit submit. You can either send them to an existing URL (such as your website) or you can create a simple thank you page using the page you created as a starting point



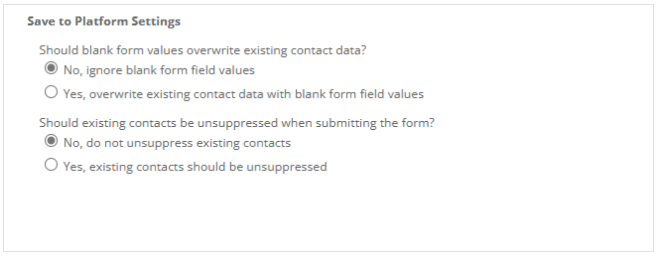
Other options on the response page include where you want the page to open. If you plan on framing the page into an existing page on your website you may want to open in the Parent Window. You can also set up a notification email to notify any user(s) in the platform when a new form entry is made.



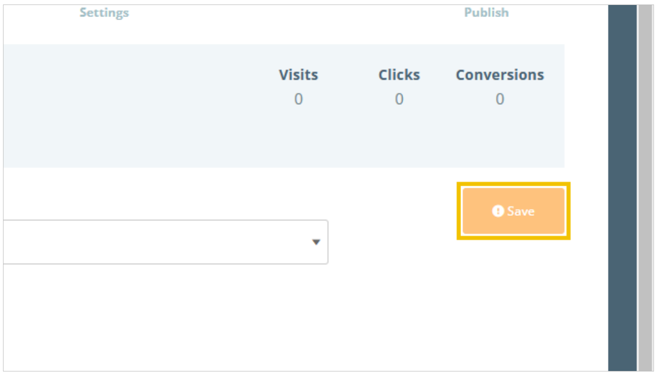
The default option on the form is to Save to Platform. However, you can also post that data to a URL by choosing Save To Platform and Post to Custom URL (you will need to set up a URL to properly handle the data). Or, if you use the emfluence Dataverse connection you can choose to Save to the Platform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



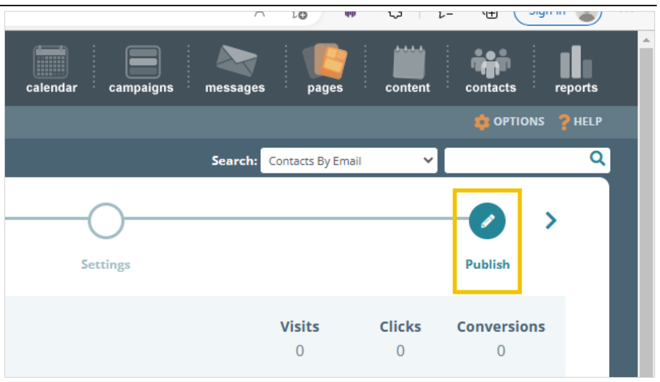
You can also choose whether or not you want blank fields to overwrite data within in emvfluence and if you want a new submission for a suppressed contact to reset their suppression within your account



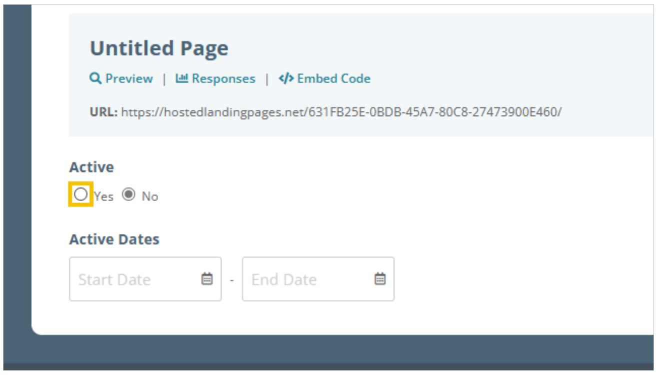
Click to **Save**



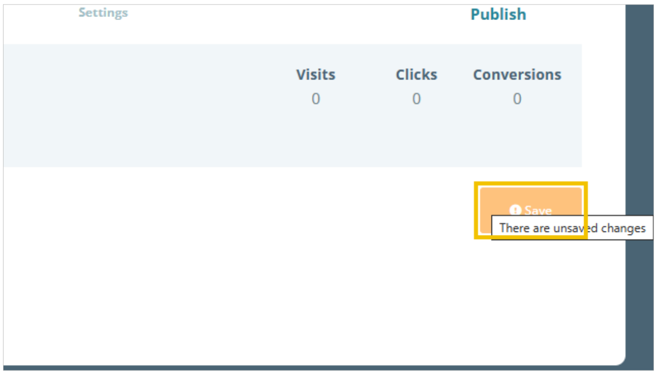
Advance to the **Publish** step



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

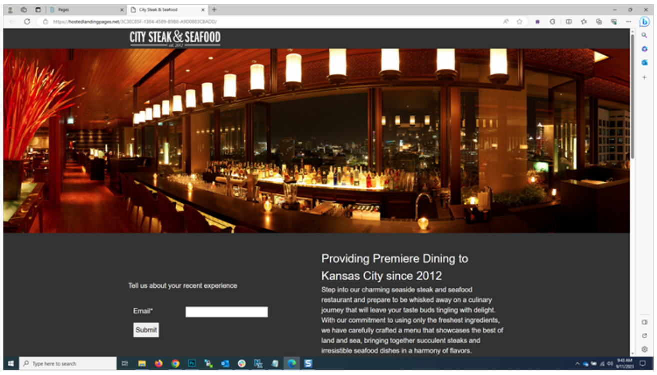


Click **Save**



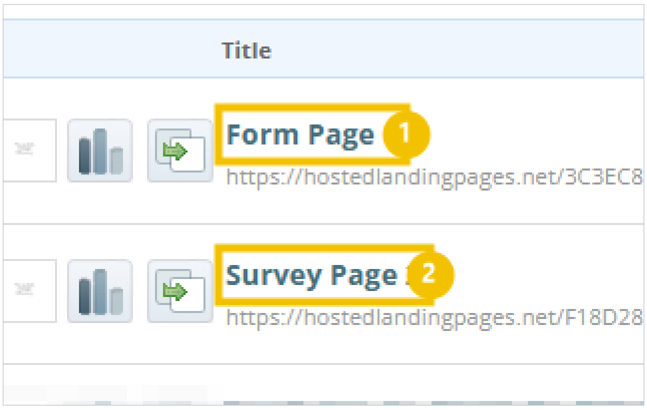
4.5. Progressive Forms

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).

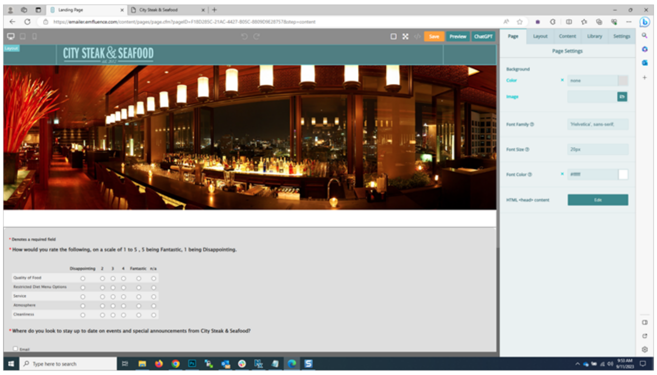


Create the separate pages with forms and surveys. Then you will connect them through the form response page options.

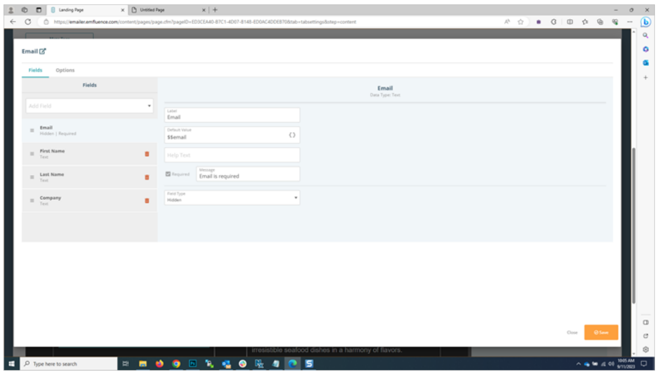
1. **First Page**: Your first page with your initial form.
2. **Second Page**: Your second page with an additional form or survey.



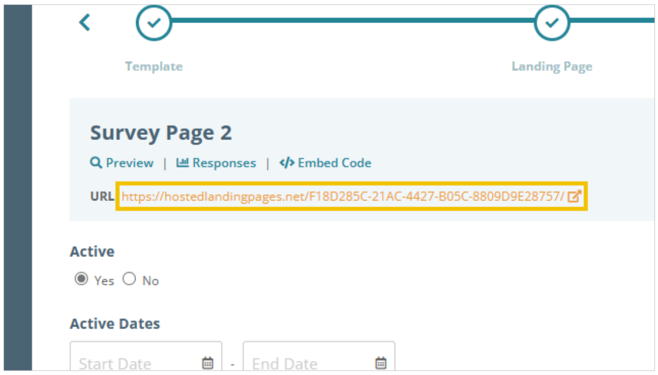
Start with building your final page in your series.



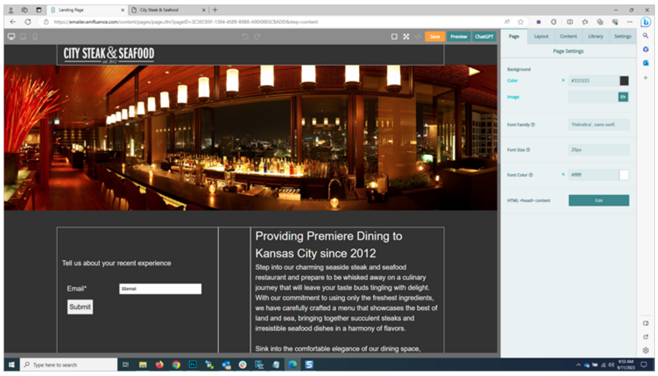
If you are moving from form 1 to form 2, you still need email data to connect the two entries. However, email does not need to appear on the second form. On your seccond form, make the required email field a Hidden field (whose value will be passed from the form on page 1).



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



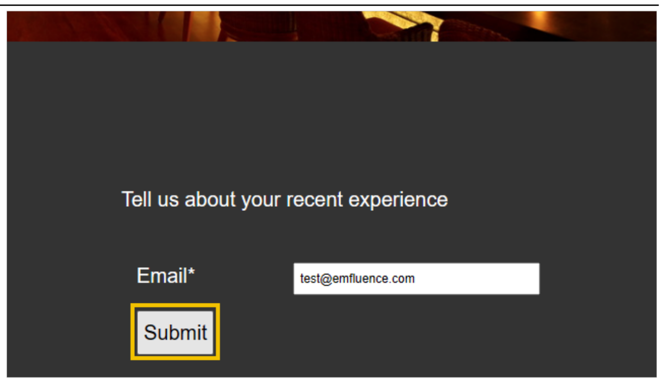
Create your initial page with your form.



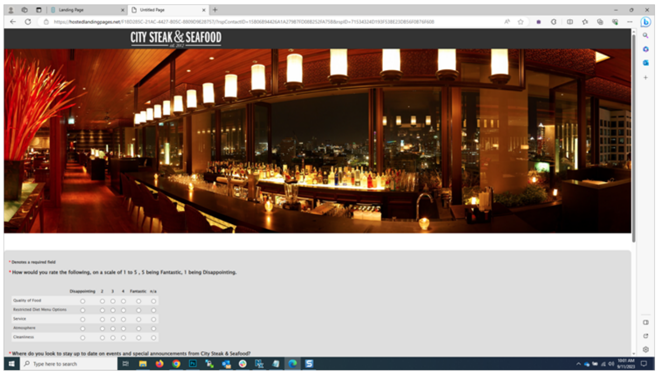
Paste in the URL from your second page as the URL for your response page. Don't forget to also check the box to pass content on to the new page.

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.



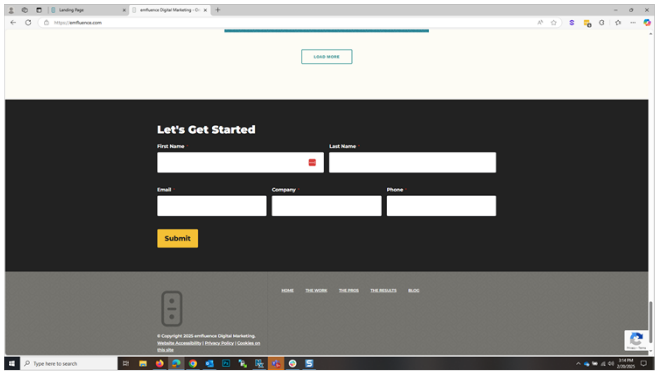
Then fill out your form and/or survey on the second page and you can confirm your information saved correctly.



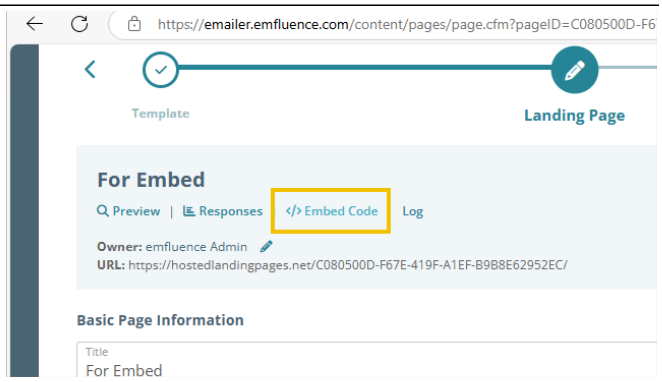
4.6. Embed on your Website

4.6.1. Setting up the Embed Code

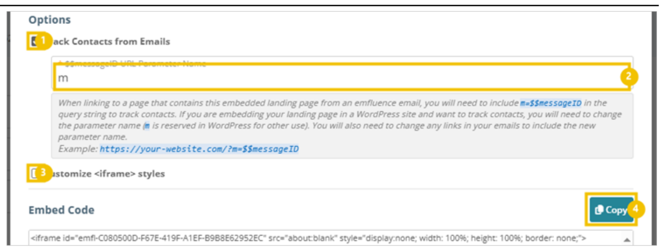
Rather than using a freestanding landing page, you may choose to embed a landing page with a form into your website.



After making your landing page and form, on the Landing Page step, click **Embed Code** to get the code you will need in order to embed the content. The page may just be the form, and nothing else, or you might choose to have text, images, etc. as well. Whatever is included in the page will be responsive content when you embed it into your webpage.



In the pop-up you will find the code needed to embed on the page where you want your form and landing page to appear. The code is made to be responsive, allowing the content to fill the container on your page where you will add the iframe.

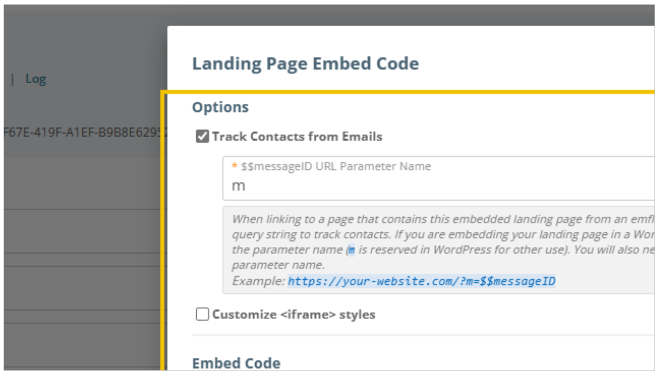


1. **Track Contacts from Emails**: On a freestanding landing page tracking will occur naturally when the contact is known. However, choosing to embed the page means extra steps will be needed to track a contact from an email onto the page where the form and page are embedded.
2. **Tracking variable**: When pushing contacts from an emfluence email to a page where the landing page is embedded, you will need to include the code at the end of the URL. The first piece of this is the variable. By default

emfluence uses "m" (for message). However, you can change this to be any variable as long as you are consistent when sharing the link in emails.

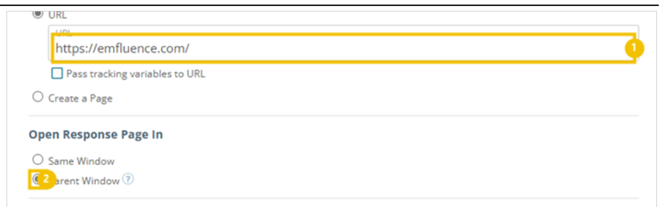
3. **Customize iframe styles**: Click to customize the styles of your iframe
4. **Copy**: Copy the embed code. If you have changed the variable at the top the code will change for you before you copy it.

Copy the embed code and paste it into the website. If you are handing off the code for someone else to add it to your website, make sure you save the file in in a non-formated text file (do not save it in Word).



On the response page. You can choose to reload information inside the frame after submission or push the contact to a new page.

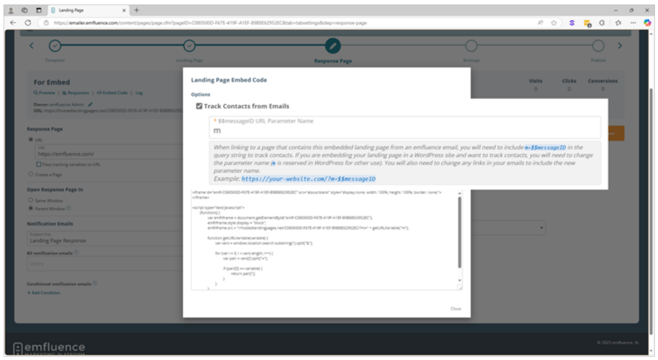
1. **URL**: If you are going to push the contact to a new page after submission, paste the URL where you want them to be redirected.
2. **Parent Window**: If you are redirecting the contact to a different URL, and don't want that URL to be loaded within the iframe, make sure to choose to open the response page in the Parent Window.



4.6.2. Linking to the page in an email

When linking to a page that contains this embedded landing page from an emfluence email, you will need to include m=$$messageID in the query string to track contacts.
Example: https://your-website.com/?m=$$messageID

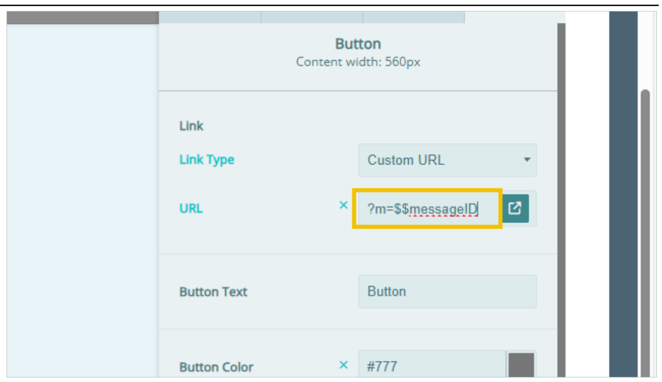
NOTE: If you changed your variable in your embed code, to use something other than the default "m" variable, you must remember to use the same variable in your links.



When composing your email and adding your link to a button, text, or behind an image, paste the page's URL and remember to add the m=$$messageID at the end of the URL. This will track the contact through the page into the embed.

Example:
https://emfluence.com/?m=$$messageID

Reminder, the variable used in your embed must match the variable used in your link.

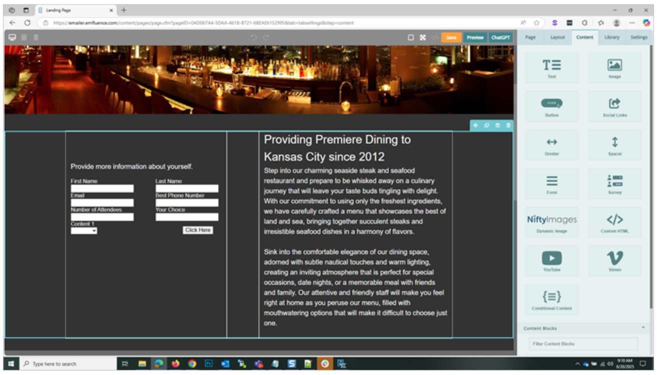


4.6.3. Troubleshooting

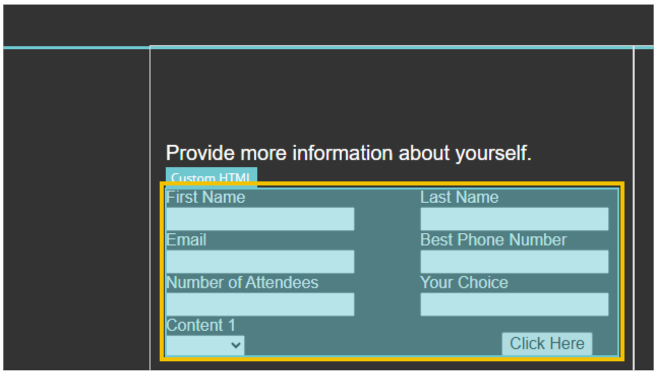
My visits aren't being tracked?
 * Are you remembering to add the variable code at the end of each URL?
 * Is the variable you are using the same as what was embeded on the page?
 * Do you have a WordPress website? WordPress uses the "m" variable for different purpose which could break the relationship inside the frame. When embedding inside WordPress we suggest using a different variable such as "emfl" or one of your choice, remembering you must use that same variable when sharing the link.

4.7. Custom Forms

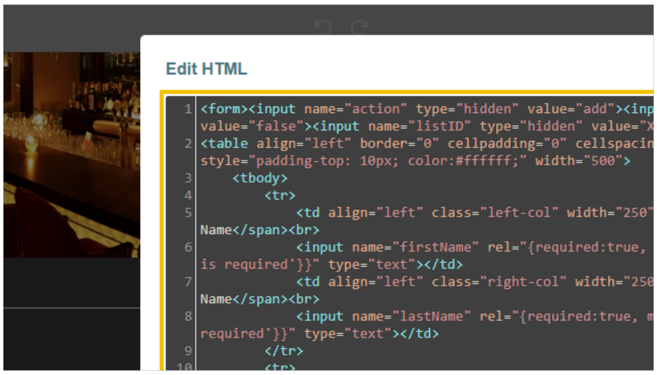
If you find formbuilder limiting, you can code your own custom form which will allow for more layout options.



Drag out a Custom HTML element where you can type or paste your code.



Your forme code will need to properly identify each of the fields and group where you want data to be saved. Make sure to test custom forms to confirm they are working as expected.

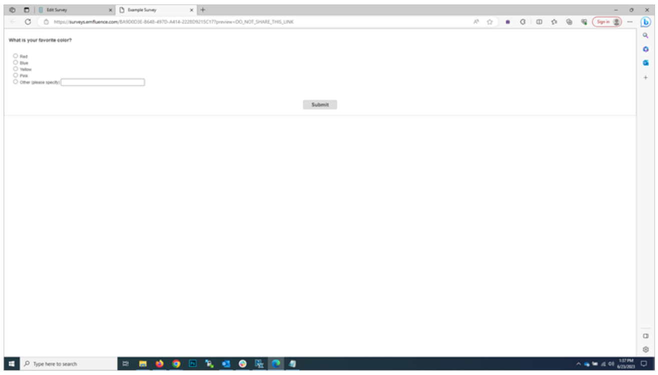


For more information, reach out to support@emfluence.com

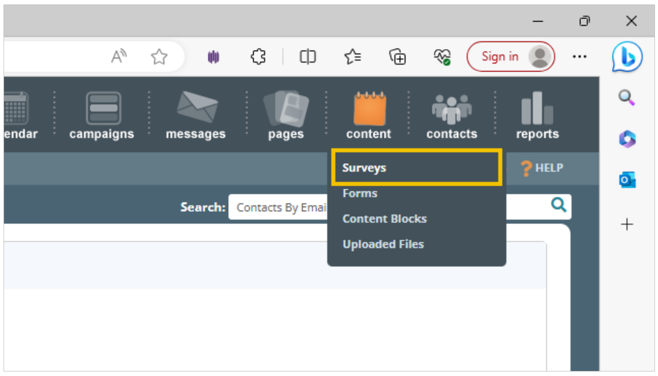
5. Surveys

5.1. Create a Survey

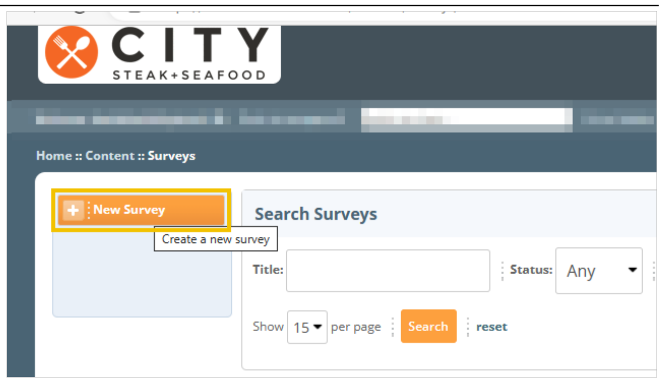
You can use the emfluence Platform to create and distribute surveys to your contacts.



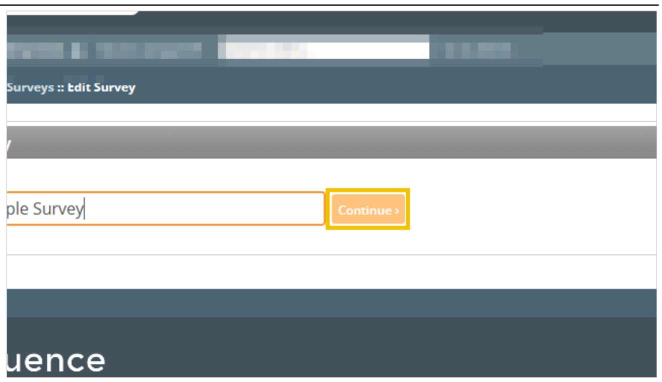
Surveys can be found in the **Content** section.



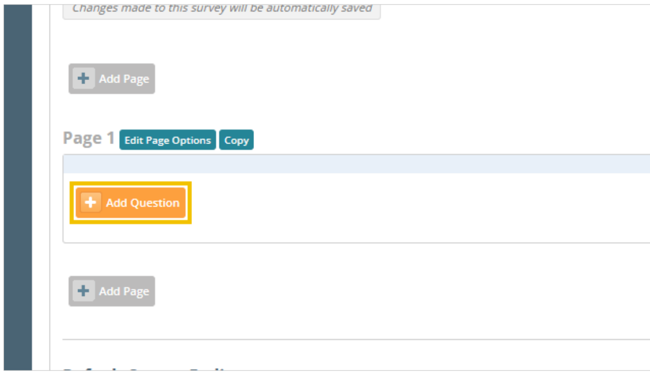
To create a new survey, click on **Create a new survey**



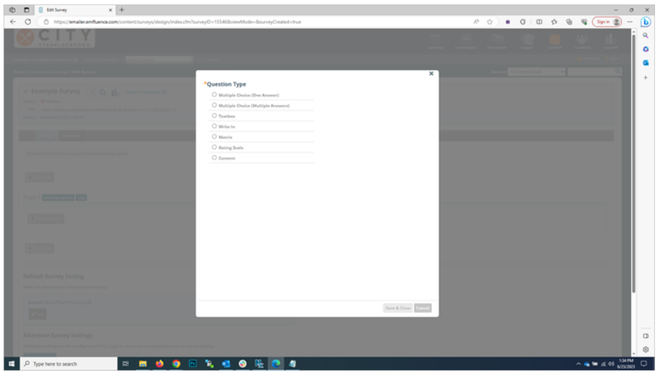
Name your survey and click **Continue**



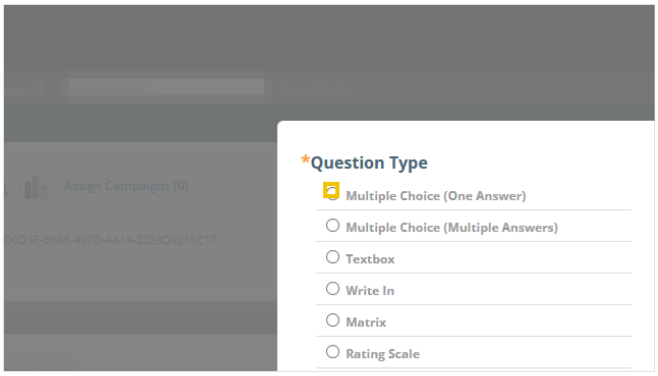
Surveys can be multi-question and multi-page. To create your first question, under Page 1, click **Add Question**



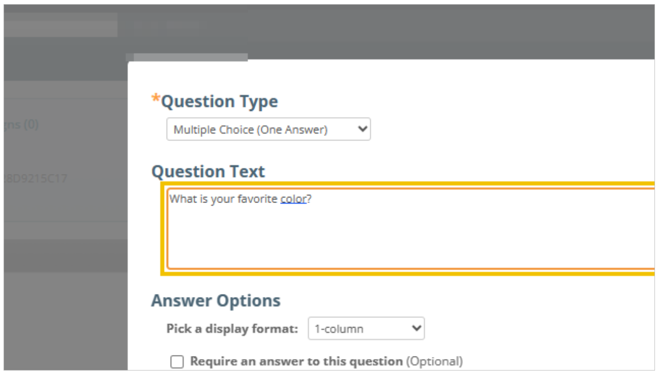
There are multiple survey question types you can use. Hover over any of the question types to learn about each one.



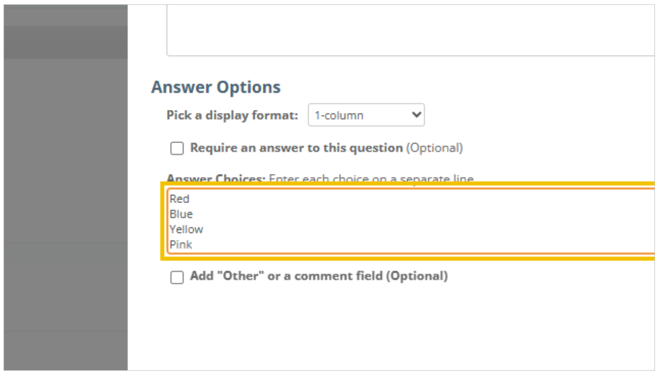
To choose your question type, check the radio button for that type.



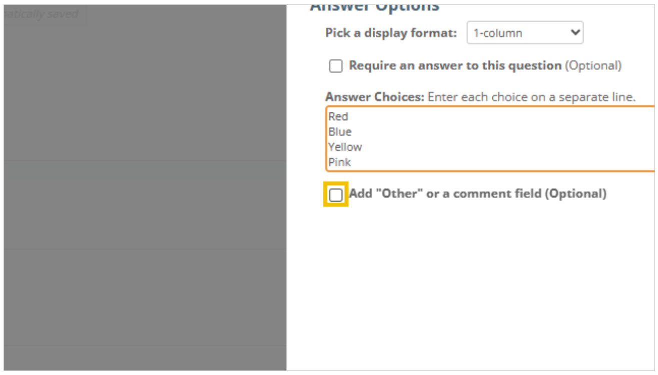
In the top box, you will write your question.



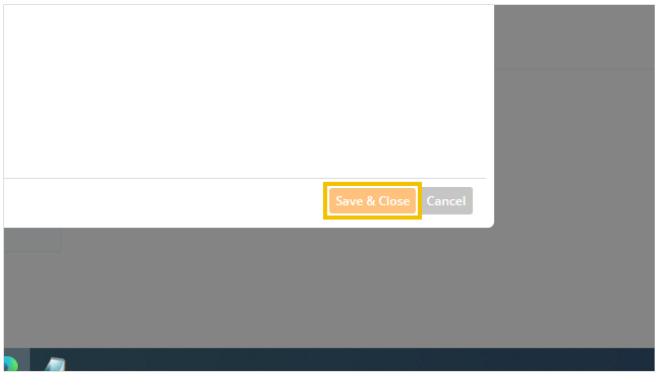
For any question type where you are providing answers rather than a simple write-in response, you can type in your answer choices separating each one on its own line.



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)**

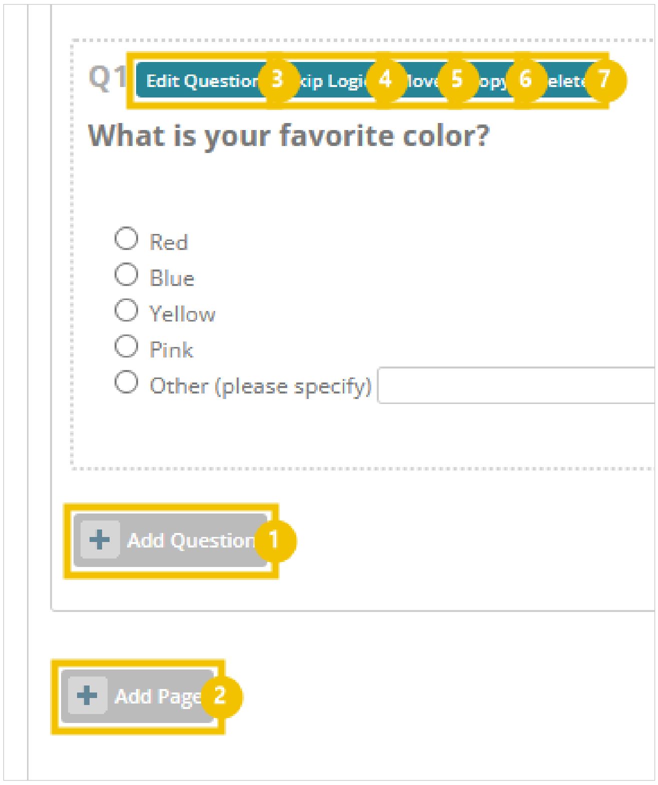


Click on the button **Save & Close**

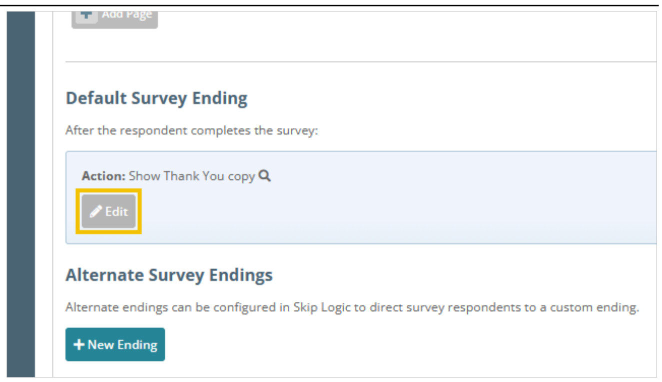


You can include multiple questions on the same page and also add additional pages to your survey to spread out your questions and take advantage of skip logic.

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.

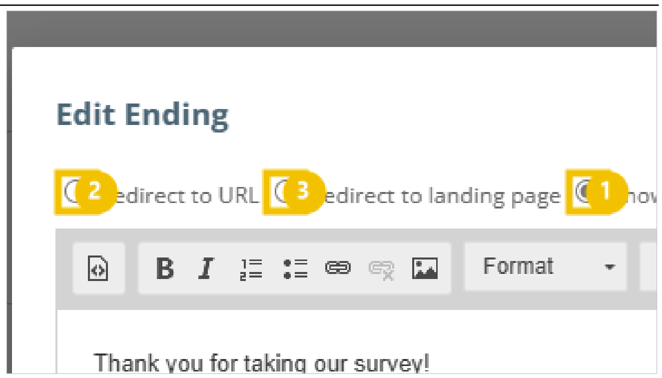


To edit the ending of your survey, what someone will see after completing the survey, scroll down to find Default Survey Ending and click **Edit**

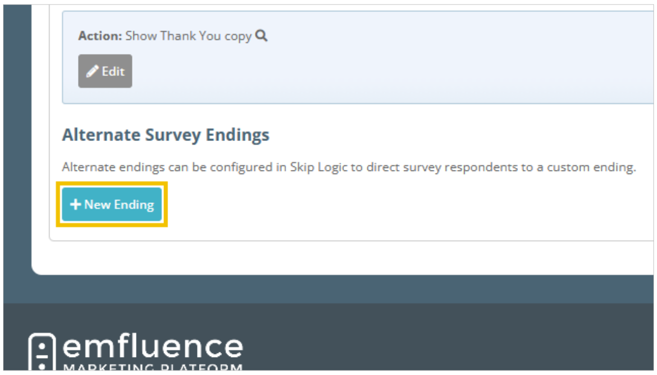


Here you can edit the default thank you text of your survey or choose an alternate location to send your survey takers.

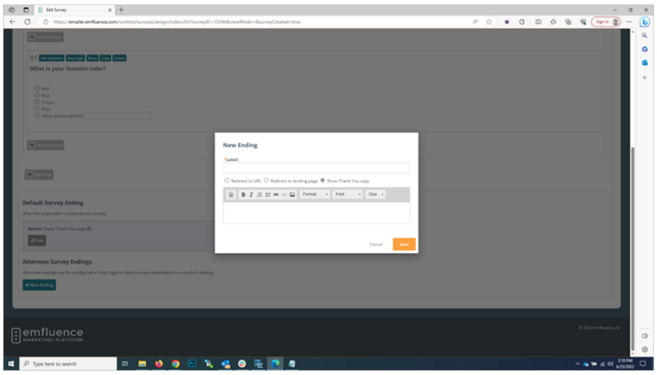
1. **Show Thank You copy**: The default choice is to show the thank you copy you will write here. You can edit the text, add images, etc. using the editor. Remember to save.
2. **Redirect to URL**: Rather than showing thank you copy, you can direct people to a URL of your choice.
3. **Redirect to landing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



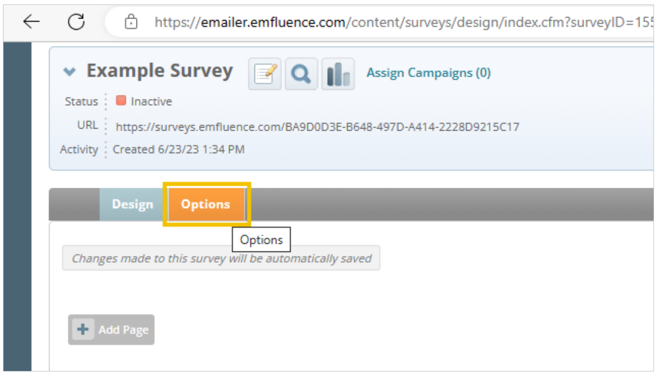
If you have used skip logic, you can create multiple survey endings and choose which one the survey taker will see based on their response to a specific question. To add an alternate ending, click on **New Ending**



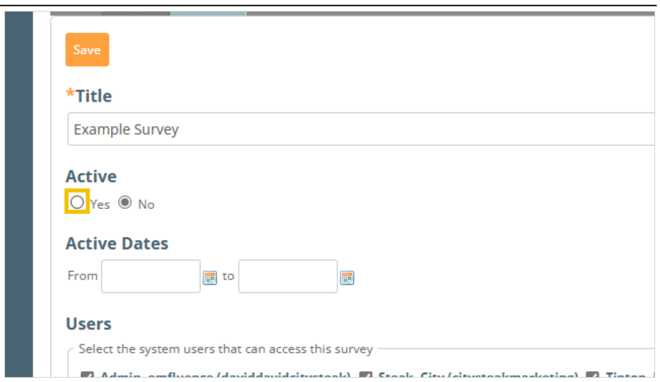
On your alternate endings you will be presented with the same options as on your default ending.



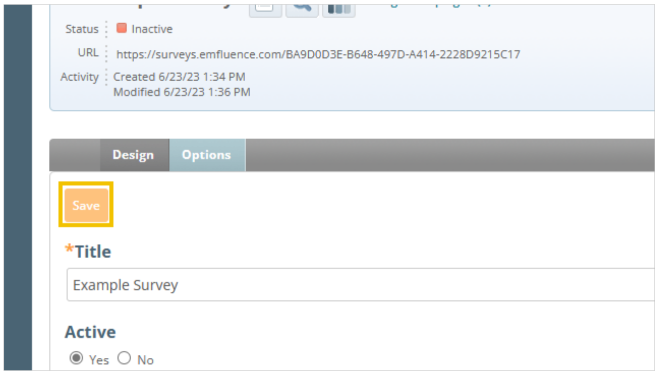
emfluence Surveys, Landing Pages, and Forms are all inactive by default. You need to activate them. To activate your survey, click on **Options**



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

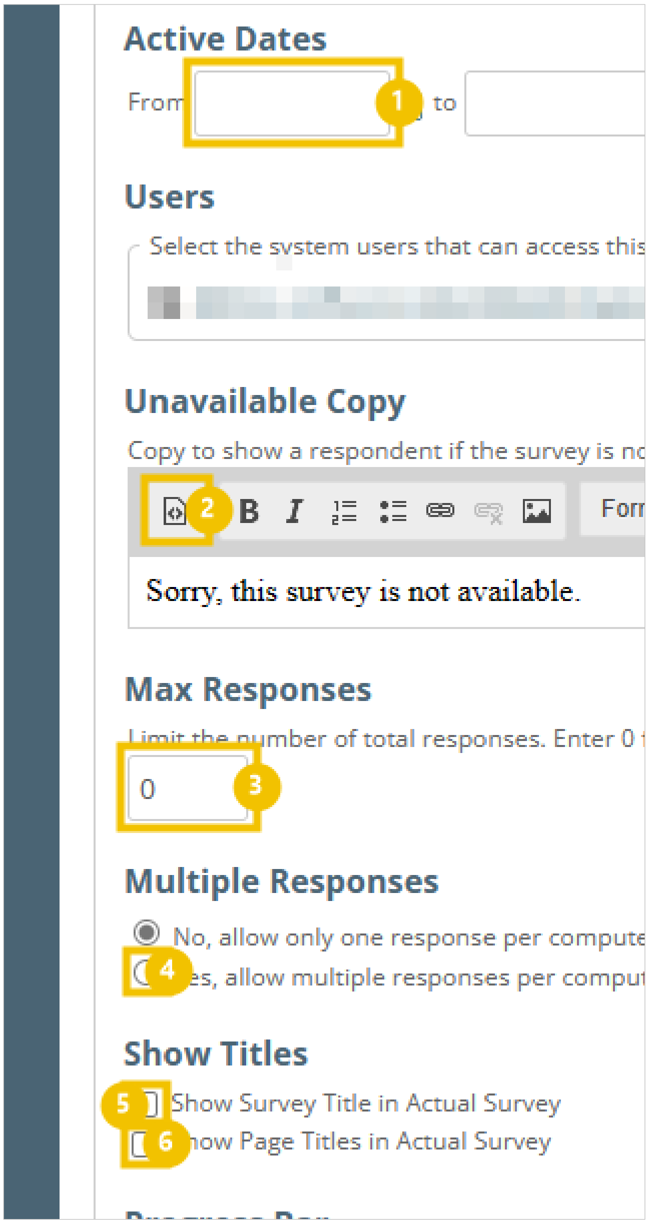


Click **Save**



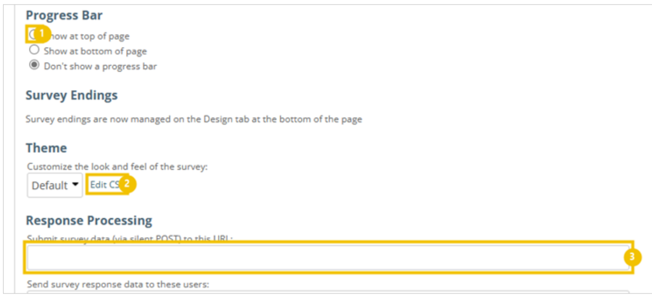
Continue to edit the settings of your survey

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.



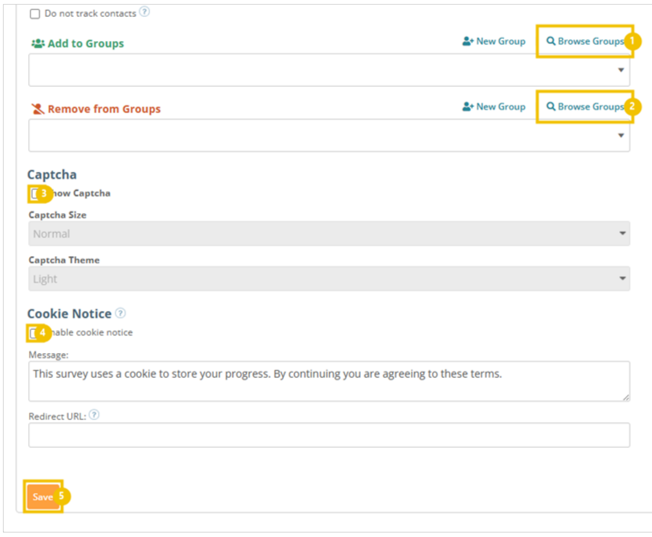
Continue to edit the settings of your survey

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.



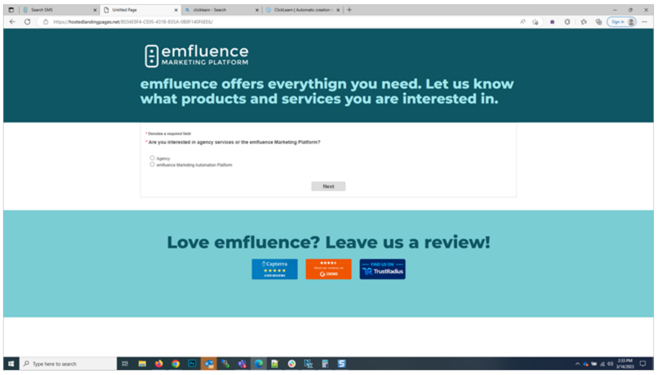
Continue to edit the settings of your survey

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.

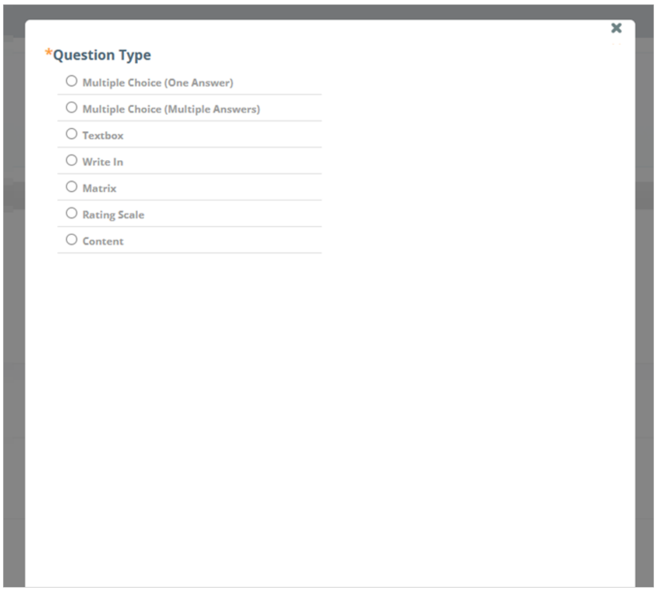


5.2. Survey Skip Logic

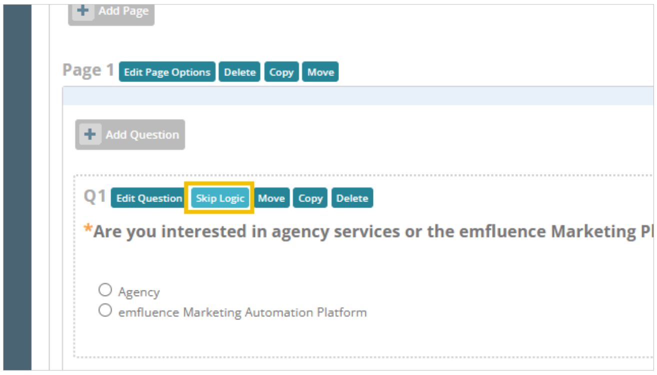
You can use skip logic to hide certain questions from contacts filling out your survey based on specific responses



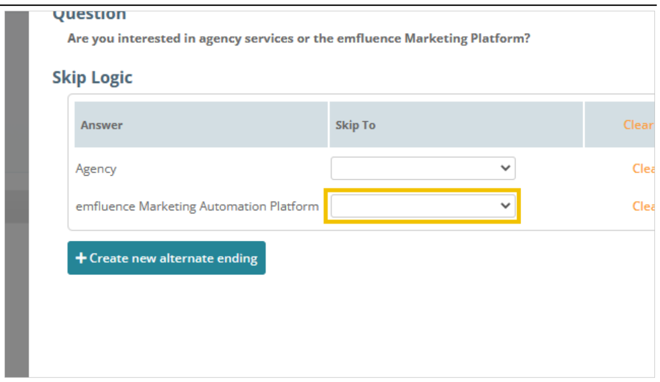
Certain question types such as Multiple Choice (One Answer) and Rating Scale can have Skip Logic applied to them



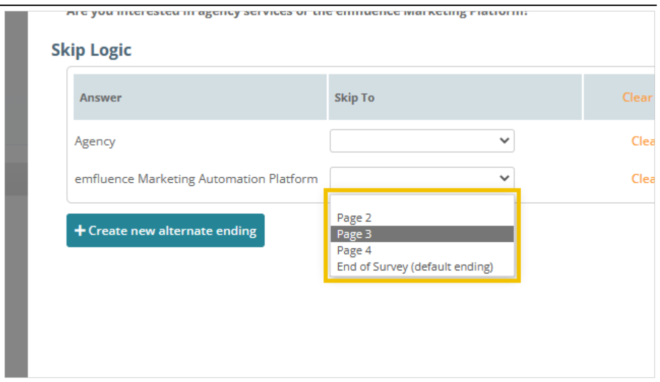
To apply on a specific question, click **Skip Logic**



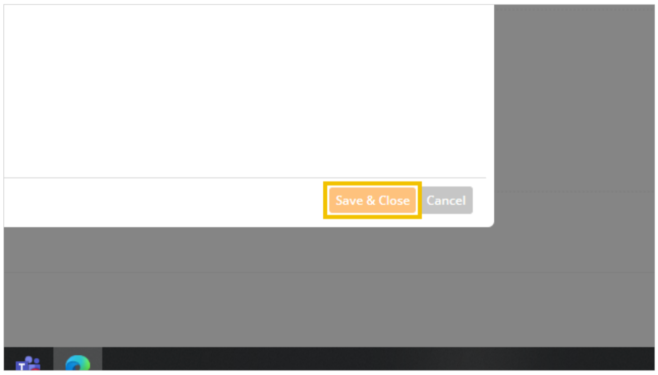
For each answer listed, you can choose which page to skip the contact forward to based on that choice. This could be used to skip over questions that don't apply to them or take them to the end of the survey



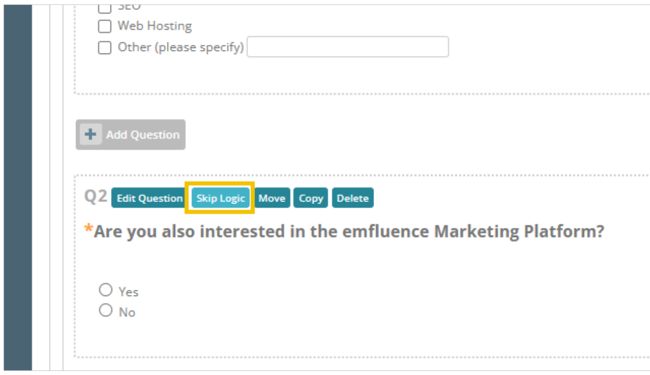
Select the page you want to skip to from the dropdown



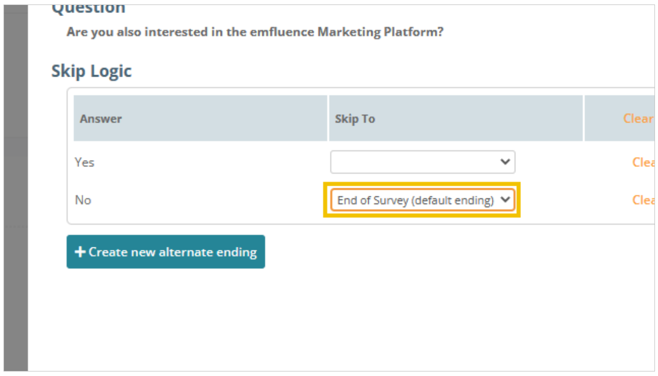
Click **Save & Close**



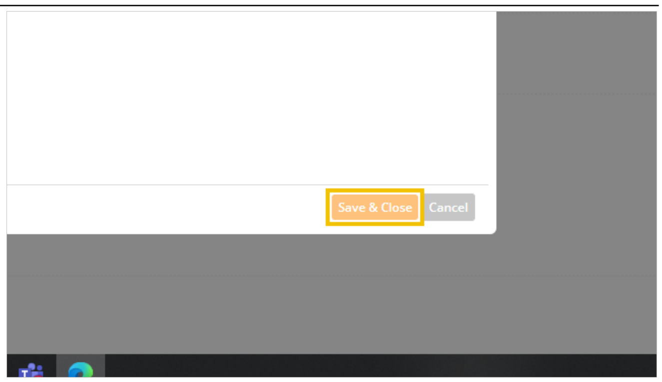
While only one question per page can use skip logic, you can apply it to multiple pages over the course of your survey. To apply it to a new question, click on **Skip Logic**



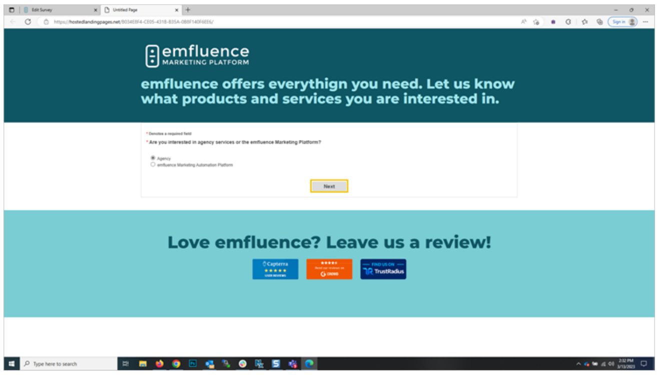
In this case we will select one of the options to advance to the end of the survey



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

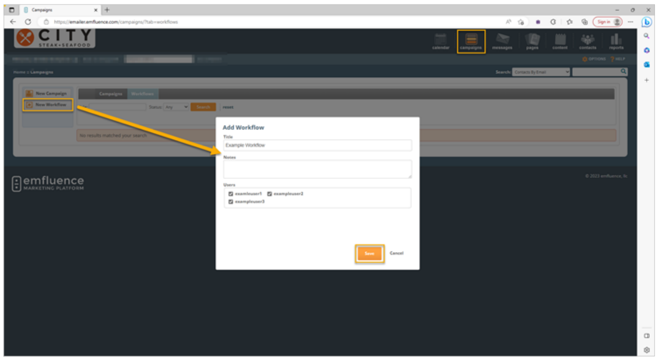


6. Workflows

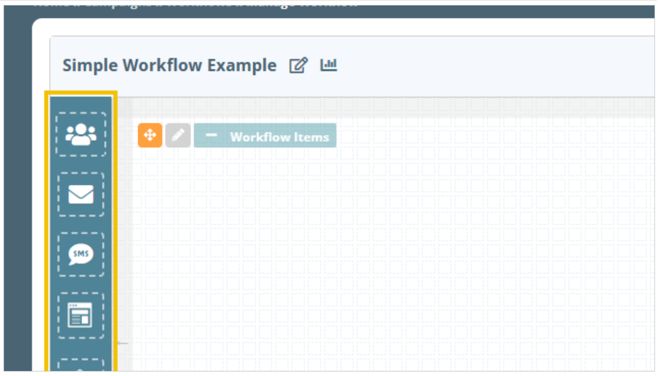
6.1. Create a Workflow

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

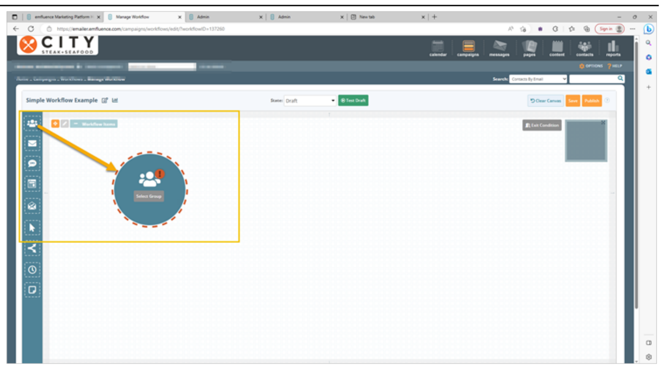
In the pop-up, name your workflow, assign any non-client admins access to the flow who need it, optionally add some notes about the flow, and click **Save**.



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.

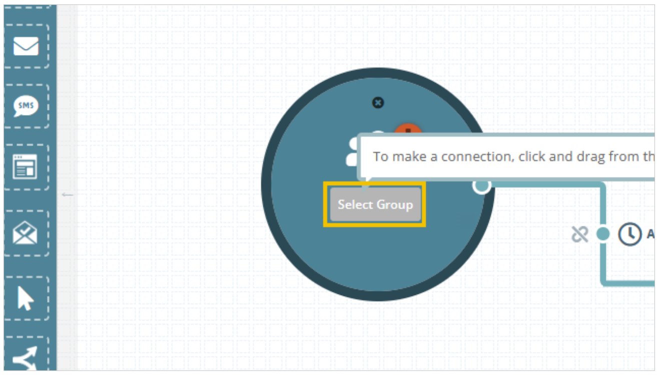


Workflows must start with a group (or, in the exception of a landing page submission, they can begin with a landing page with a form).
Drag a group placeholder on to the canvas. Also drag out an email placeholder as well.



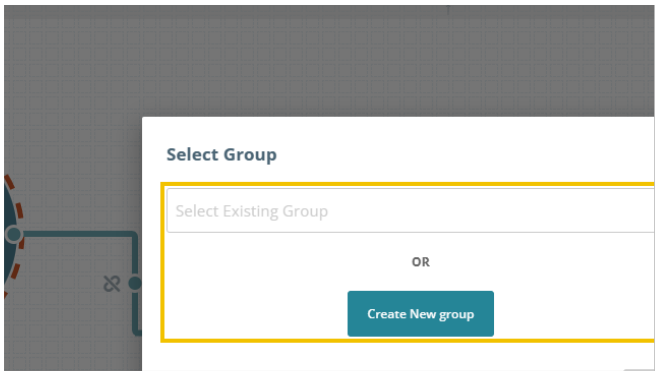
By highlighting the edge of an element, you can drag a connection from one element to another, such as connecting a group to an email.

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

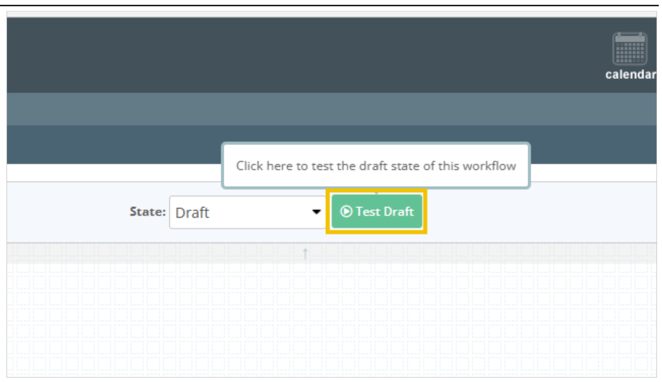


For both groups and emails, you can either assign something preexisting by selecting it from the list or create a new one for this workflow.

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.

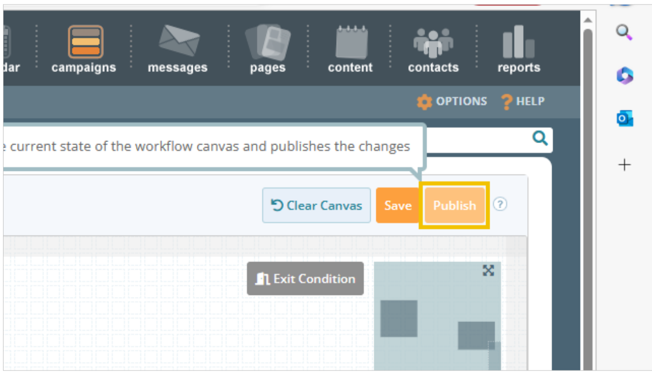


Using an example contact, you can test the workflow either before or after publishing it. In either instance, to properly test you will need all your elements connected and activated in order to test a contact's path through the workflow.

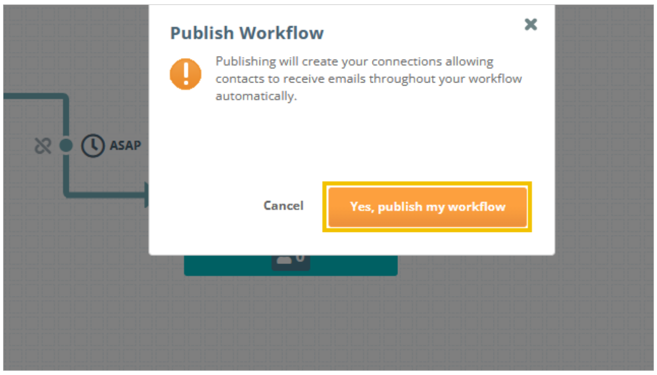


When you are ready to publish your workflow, you can click the **Publish** button in the top right of your screen.

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.

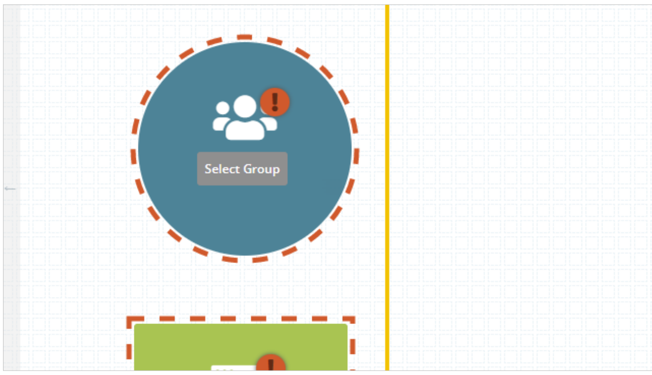


Confirm by clicking **Yes, publish my workflow.**



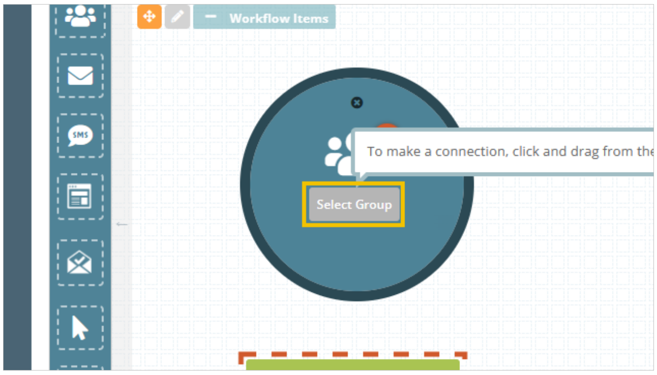
6.2. Workflow Nodes Overview

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.



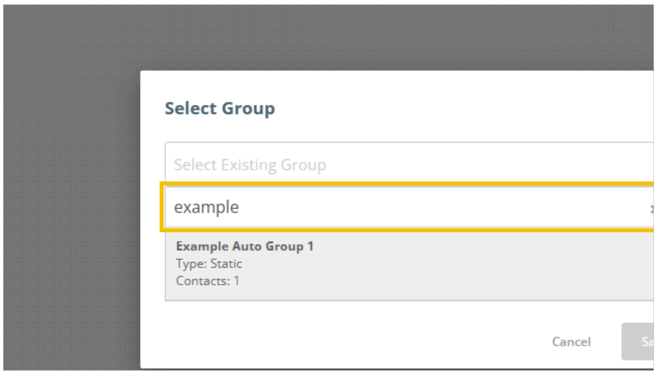
6.2.1. Groups

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

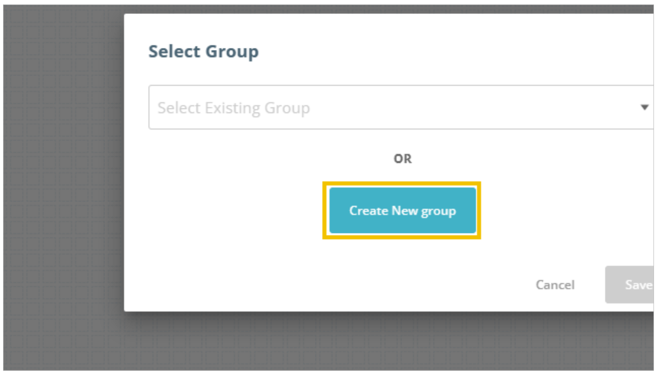


To choose an existing group, start typing the name of your group in the **Enter Group Name** field and then choose the group.

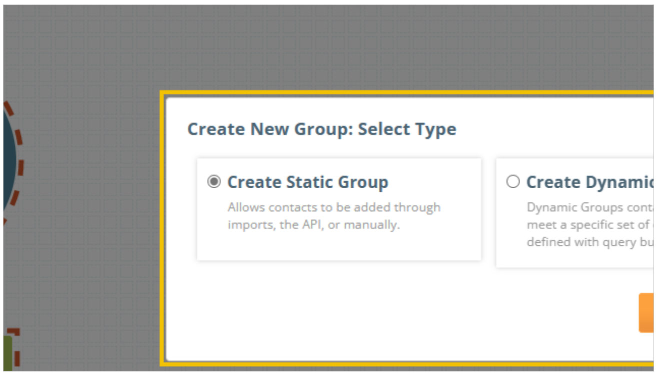
NOTE: Groups cannot be used in more than 1 active workflow.



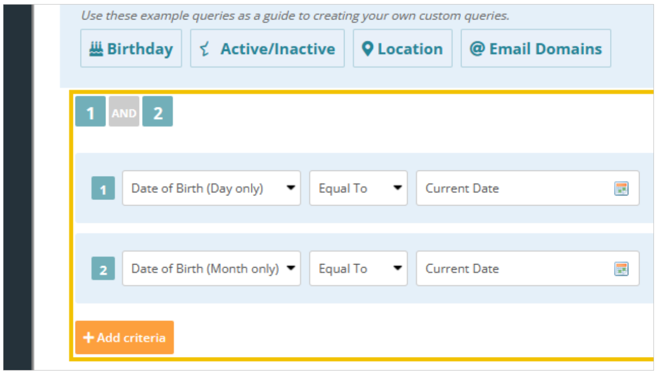
If you haven't yet created a group, click on the button **Create New group.**



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.

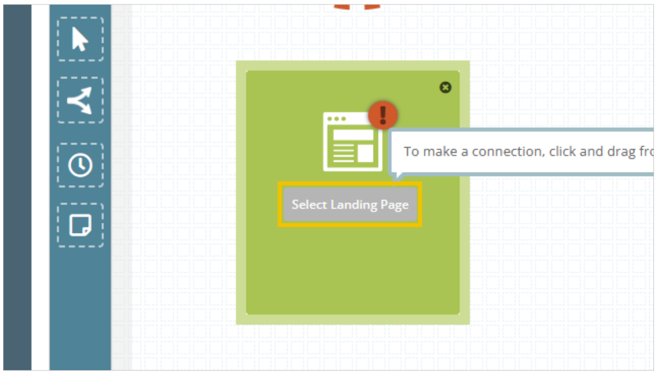


If you choose a **Dynamic Group**, you will need to create a query. Unlike a static group which is fed manually, a Dynamic Group adds and removes contacts based on the query. The most common type of Dynamic Group is a birthday group. The people matching each day will be different based on who matches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

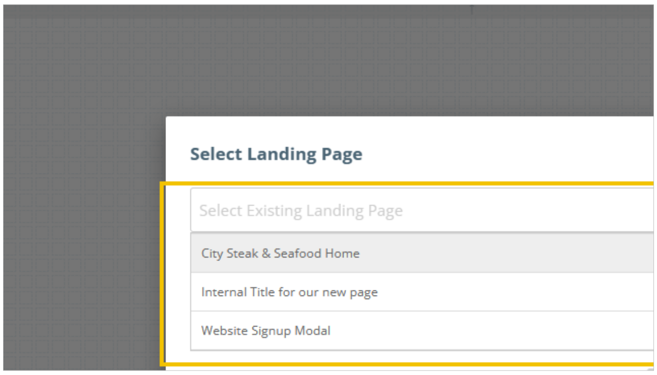


6.2.2. Landing Pages

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.



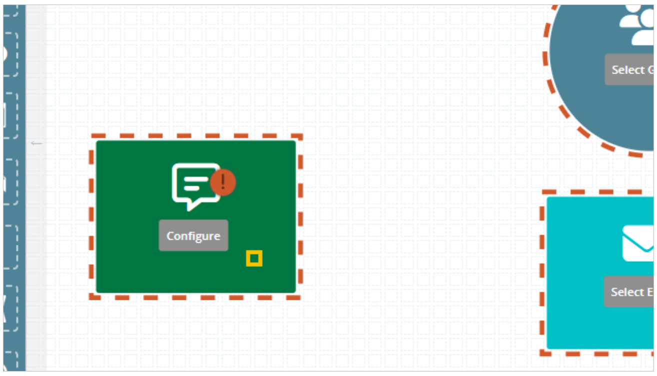
You can either **Select Existing Landing Page OR Create New Landing Page**. If the page exists, type the name and choose it from the dropdown. If it doesn't yet exist, click the button to **Create New Landing Page**.



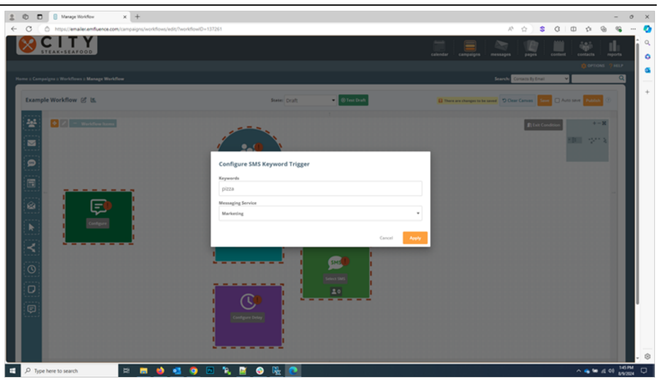
6.2.3. SMS Keyword Trigger

The **SMS Keyword Trigger** allows you to kick-off a workflow from an incoming text to your SMS number. This trigger can feed Custom Decisions, Delays, Emails, SMS or add contacts to a Static Group.

The Trigger can not have any incoming connections, and to use it, you must have SMS set up within the emfluence Marketing Platform.



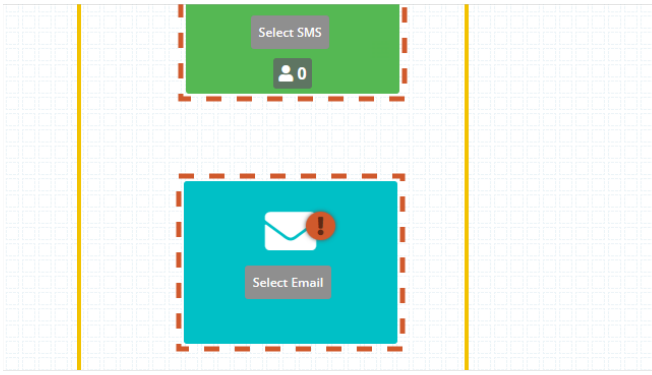
When configuring the trigger, select the SMS keyword you would like to use, select your messaging service, and connect the trigger to one of the available nodes.



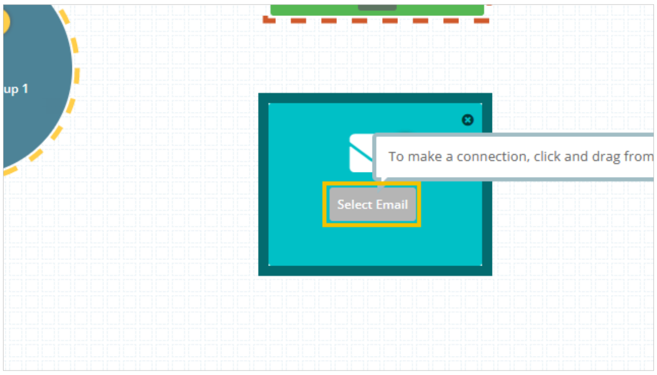
6.2.4. Messages

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.



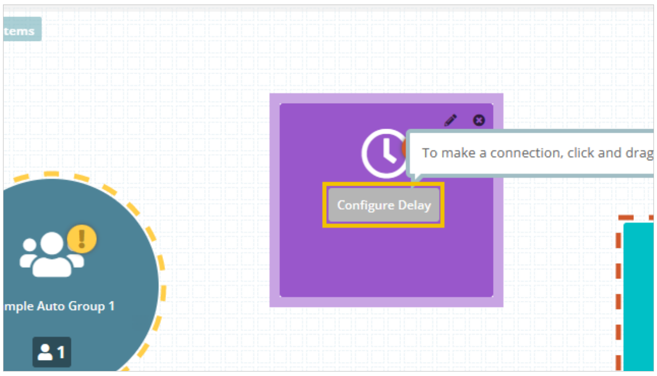
As with Groups and Landing pages, you can click on **Select SMS** and choose an existing SMS message or create a new one. For emails you can click on the button **Select Email** to choose an existing email or create a new one.



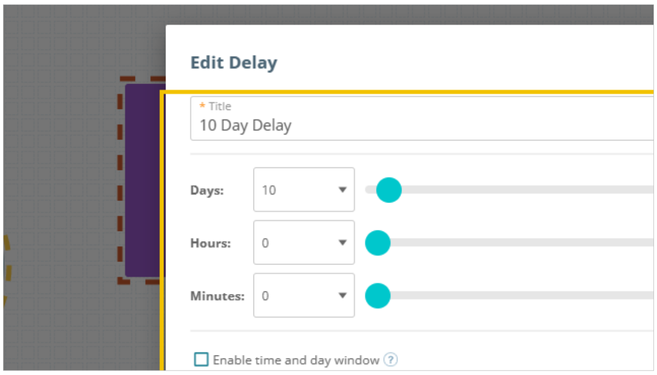
6.2.5. Delays

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.

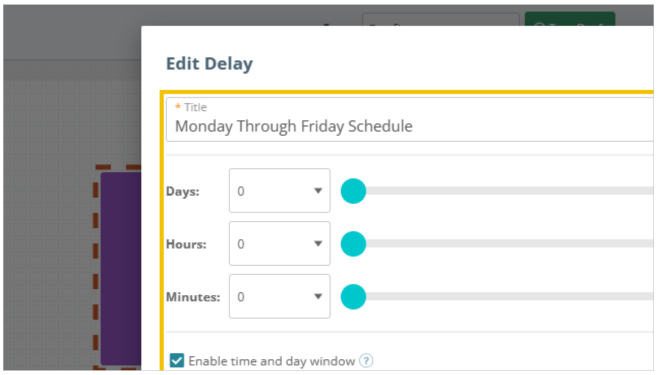


To set a time delay, name your delay and pick the days, hours, and/or minutes you wish for contacts to wait before advancing.



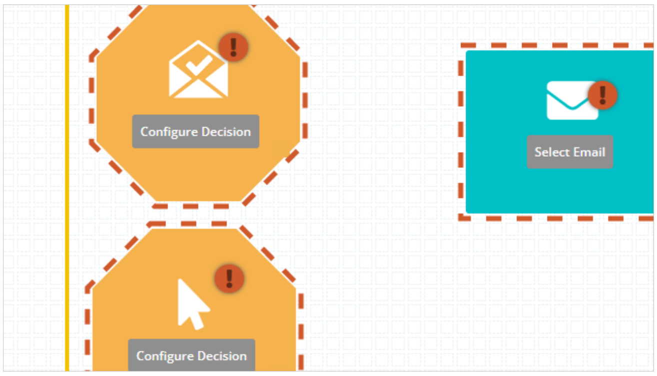
To set a schedule on a Delay, expand the Time and Day Window by checking the box and set the days and timeframes you wish emails to be delivered. Anyone being queued up outside of these timeframes will wait.

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.



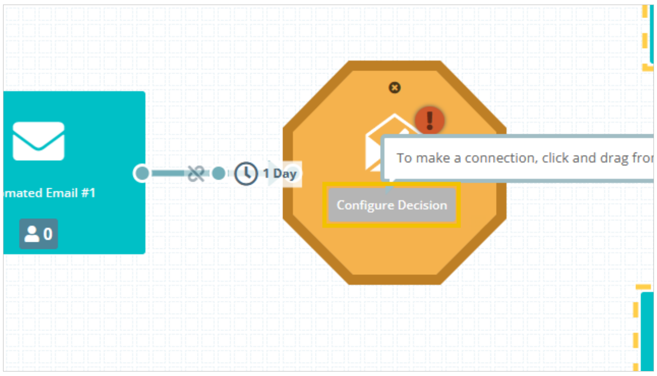
6.2.6. Decisions

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.

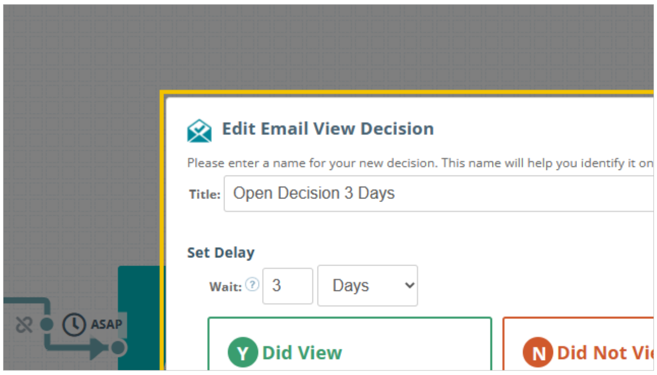


6.2.6.1. View Decisions

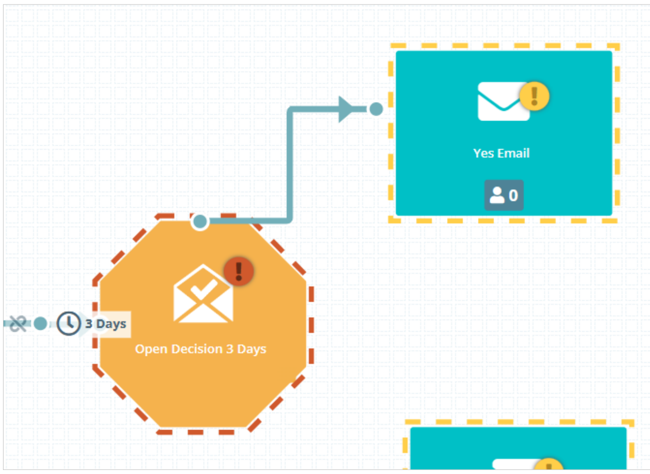
Choosing a **View Decision** will allow you to split contacts based on whether or not the opened the previous email in the time allowed. Create your preferences by clicking **Configure Decision**.



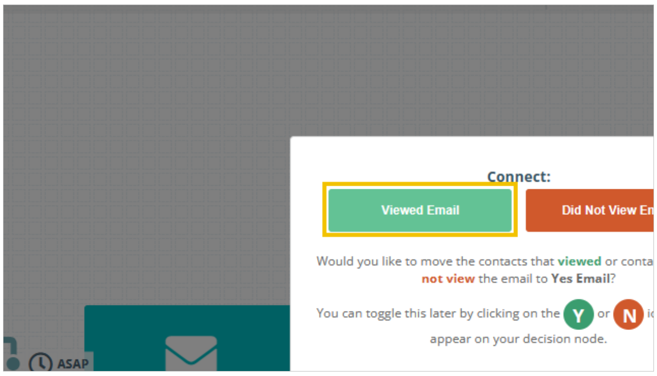
On the **View Decision**, set your title, set the period of delay in which someone has a chance to open (if they don't open by the time this period expires they are no longer eligible), and choose whether or not to advance the Yes path openers to the next step immediately or keep them on the same cadence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

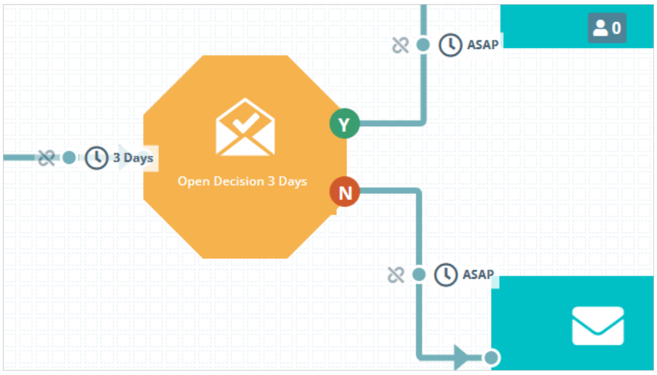


After connecting you will be given a menu to choose a Yes or No path. For the Yes path, click **Viewed Email**.



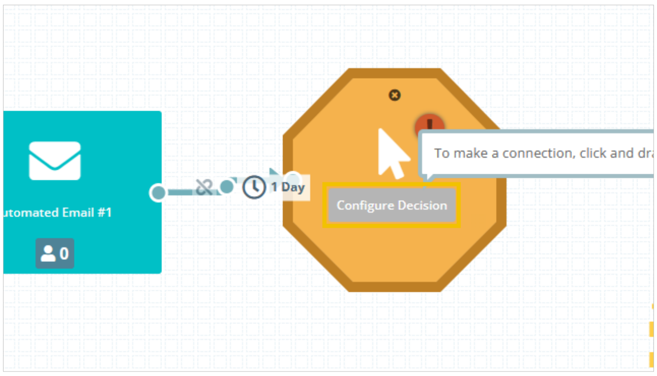
You can then connect the other half of your decision. And now you have two distinct paths.

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.

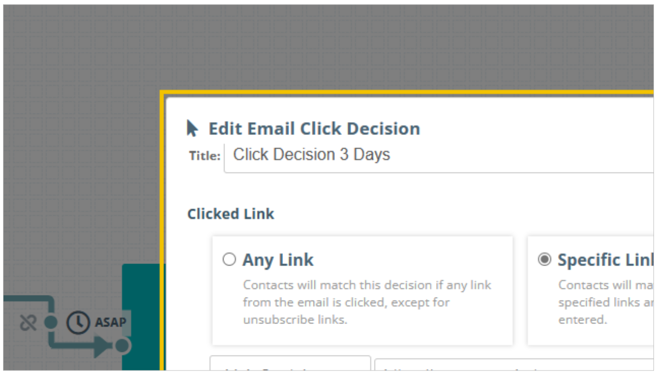


6.2.6.2. Click Decisions

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**.

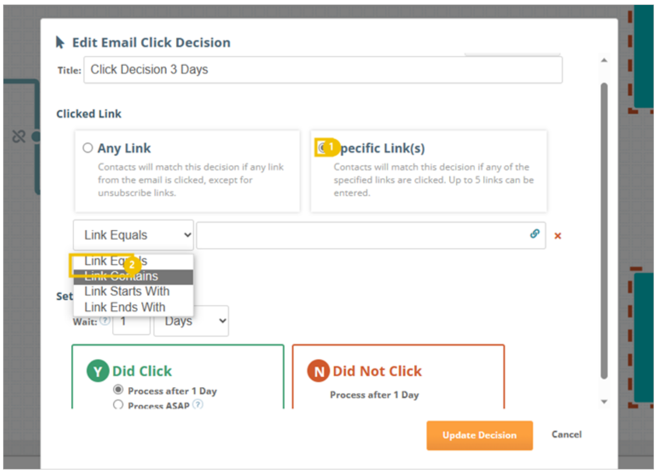


Click on **Edit Email Click Decision** to set your options. You can either choose Any Link (this includes all links except the Unsubscribe link, including header and footer links such as social links) or a Specific Link.



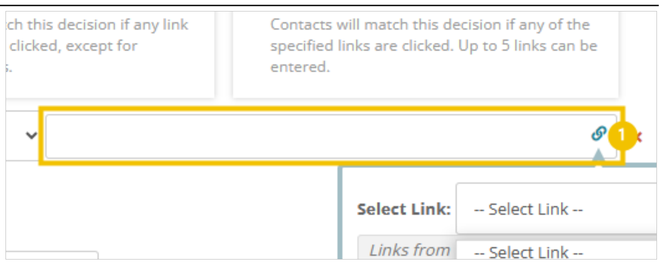
When choosing a Specific Link, you will be given a menu to choose from the previous email. If you decision isn't connected to an email with links, this menu will not populate. First, choose how to identify the link. Because links can be altered, we suggest choosing Link Starts With or Link Contains,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

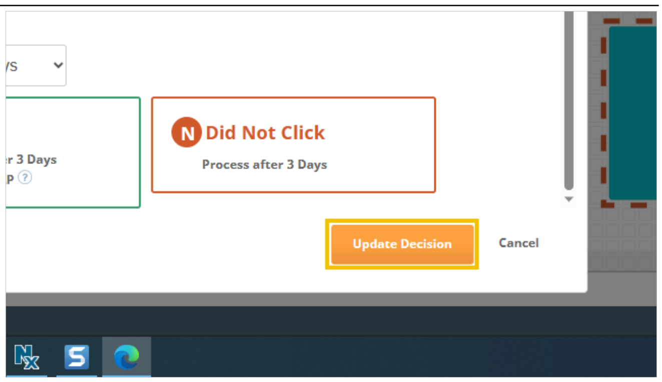


Then, from the menu provided, choose a specific link.

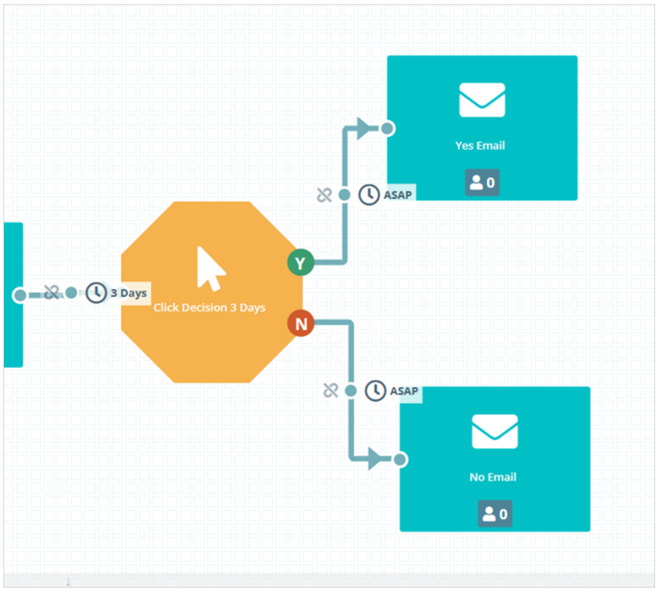
1. **Select Link**: Use the dropdowns to select a specific link from those found in the email connected to your decision.



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



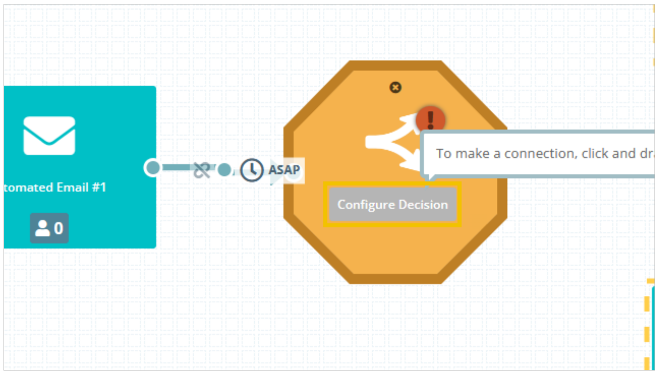
Then connect your Click Decision in the same manner you did the Open Decision.



6.2.6.3. Custom Decisions

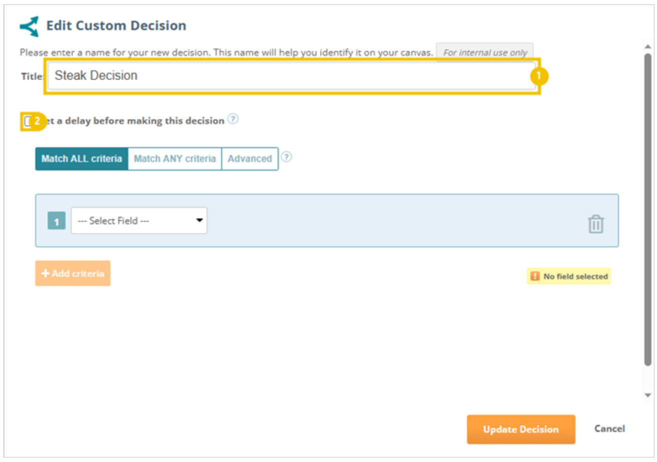
Unlike Open or Click Decisions, Custom Decisions look at the contact record (the work in much the same way as dynamic groups using a query of to meet the set criteria) rather than interaction with a single email. Because of this, they do not have to immediately follow an email.

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

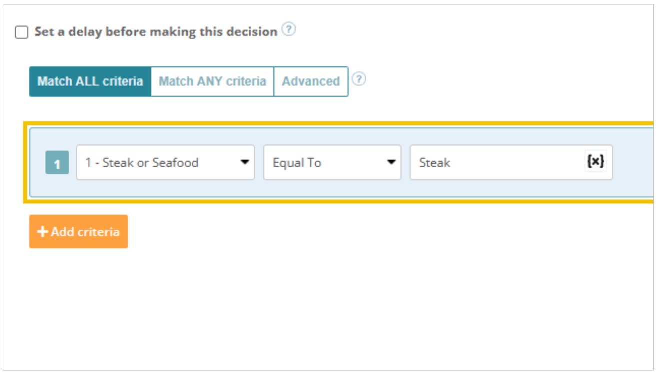


As with the other types of decisions, first name you Custom Decision. Custom Decisions don't need to have a delay by default (as you aren't providing time for a contact to open or click), however you can still apply a delay if you wish.

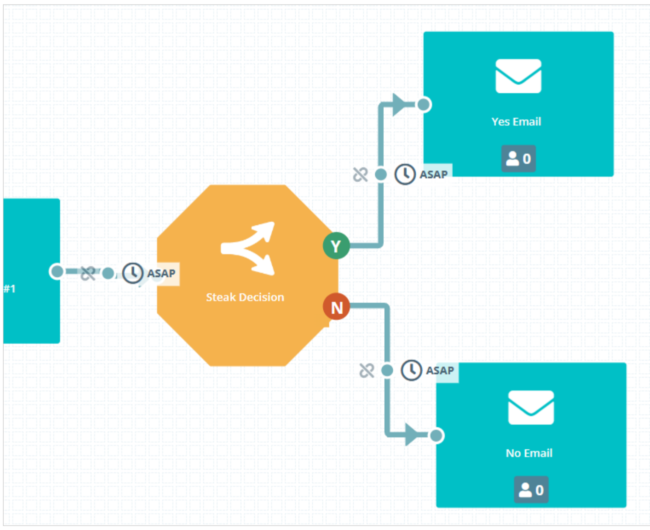
1. **Title**: Add a title to your decision
2. **Delay**: Optionally, you can choose to set a delay for a custom decision.



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**.

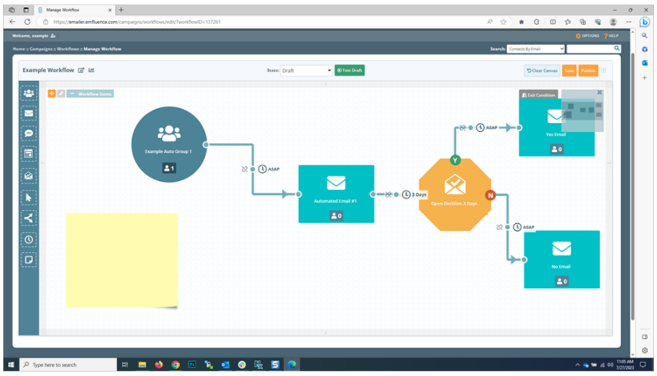


Then connect your Custom Decision in the same manner you did the Open Decision and Click Decision.

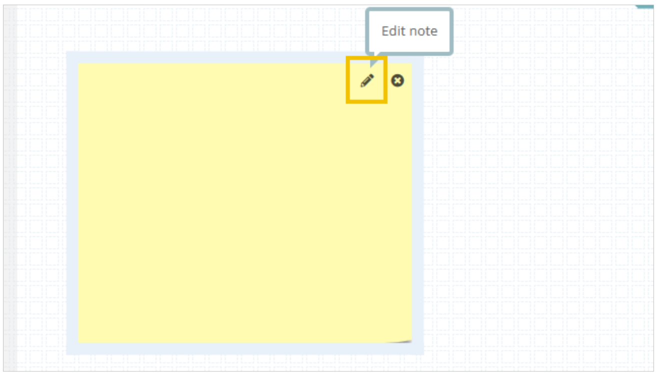


6.2.6.4. Notes

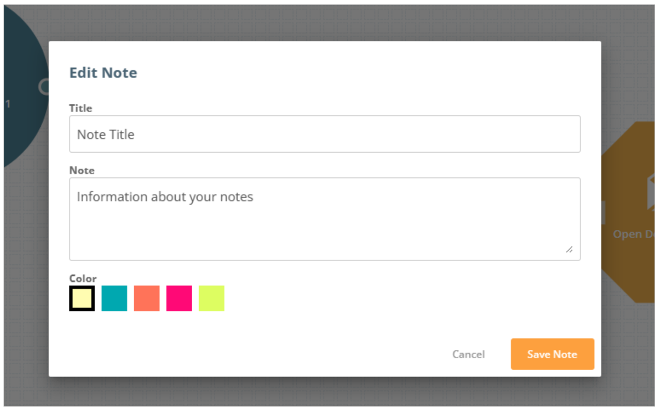
Although Notes do not interact with your workflow, you can add them to provide information and context about the purpose of you workflow.



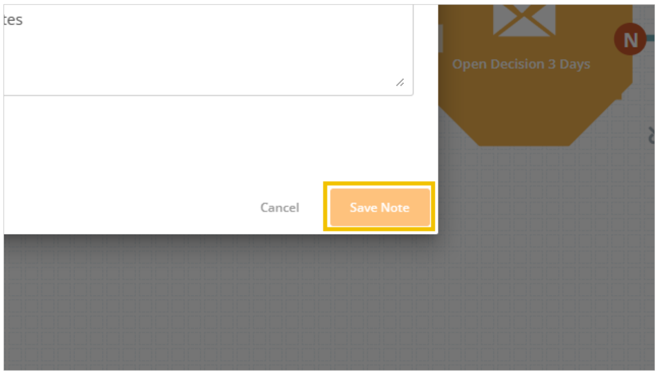
After dragging out a Note, you can edit by clicking on the pencil icon to **Edit note**.



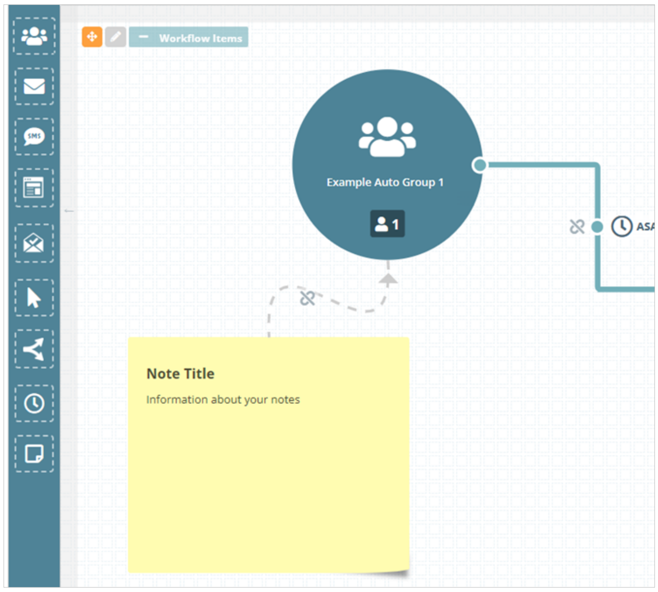
You can add a Title to your note and provide further infomation within the Notes section. You can also change the color of your note.



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

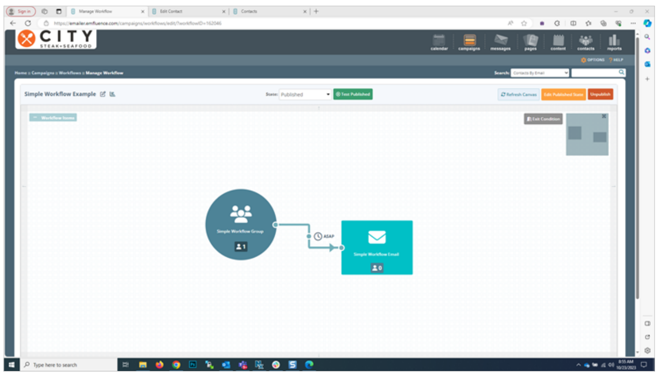


You may be creating notes for the overall workflow. However, if you are creating notes for one specific node you can connect that note to the node by dragging a connection between them. The connection has no active effect on the node, it only shows a relationship between them.



6.3. Adding Contacts to Workflows

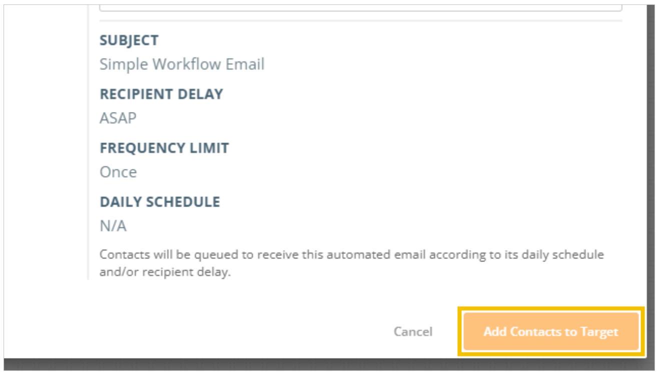
The natural way for contacts to get added to a workflow are to be added to the starting group or fill out a landing page form sumbission that kicks off a workflow. If your group is a dynamic group, the query itself will decide who gets added. Only contacts matching a dynamic group's query will be added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

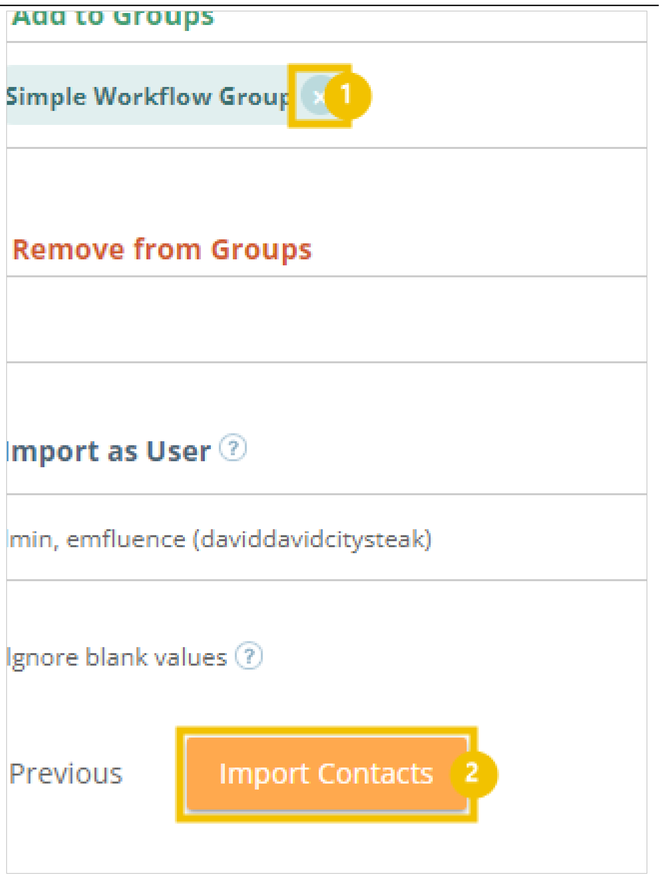
Choose the spot in the workflow you want to add the contacts to and click **Add Contacts to Target**.

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.

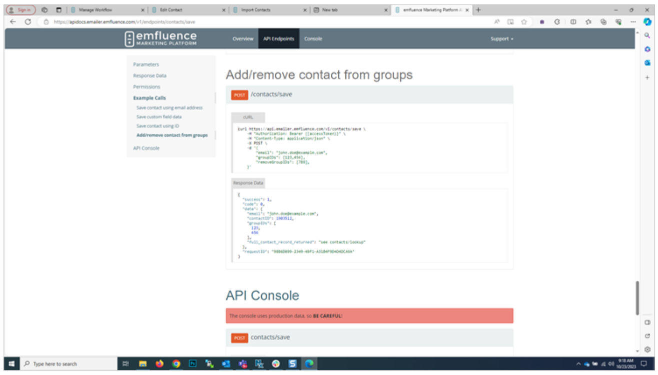


The easiest way to bulk add contacts to a workflow with a starting static group would be by importing a list of contacts and adding them to the group. NOTE: Contacts already in the group cannot be readded without first being removed.

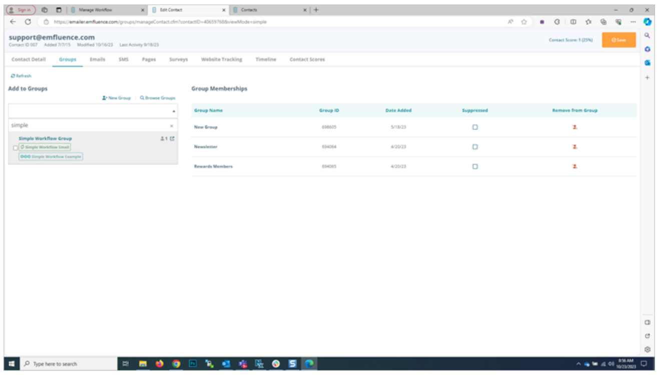
1. **Select Group**: Select the group you wish to add your contacts to.
2. **Import Contacts**: Import your list.



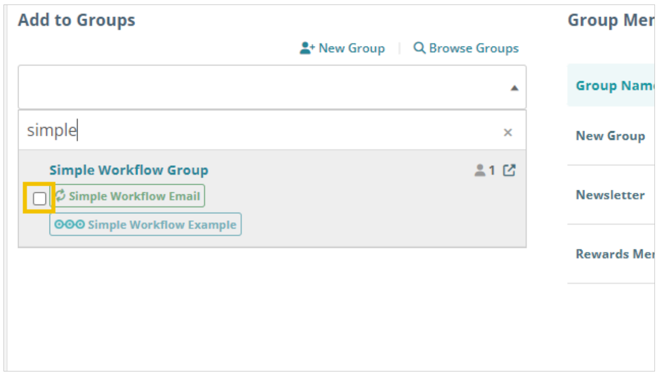
Contacts can also be added to groups through the emfluence API or through a secure FTP data sync.



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.

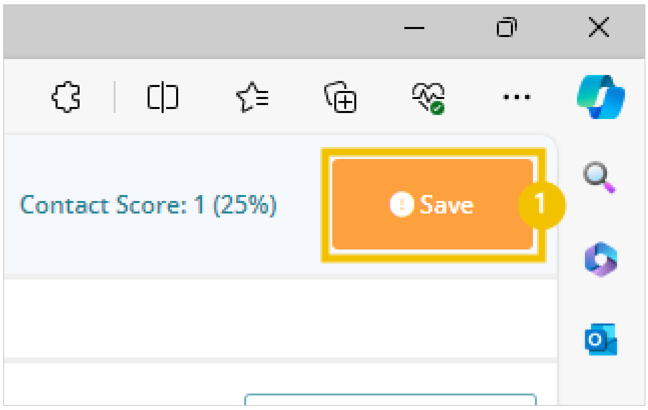


If the group is connected to an automated email and workflow you will see those listed under the group name. Check the box to select that group to add the contact to.

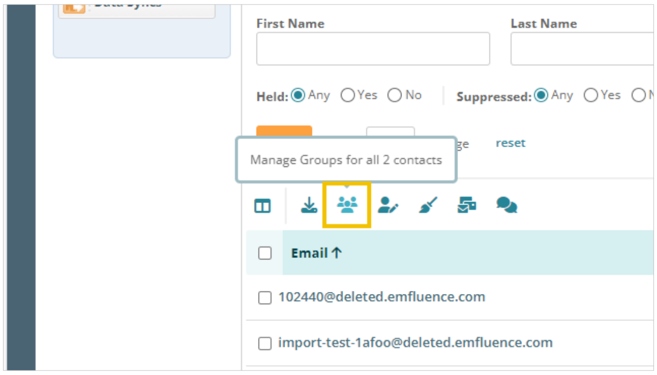


You will see a warning displayed at the top of the contact that they will be added to a workflow.

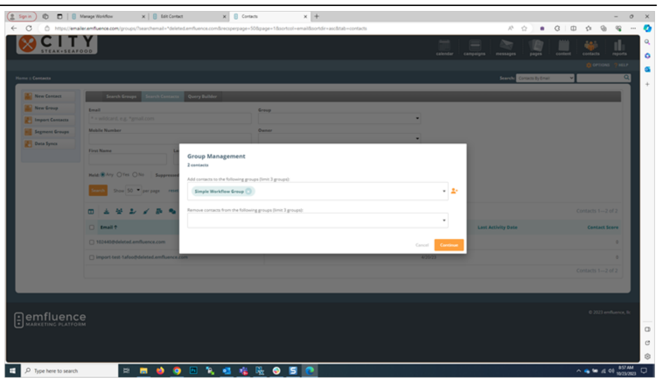
1. **Save**: Click to save your choice to add the contact to the group.



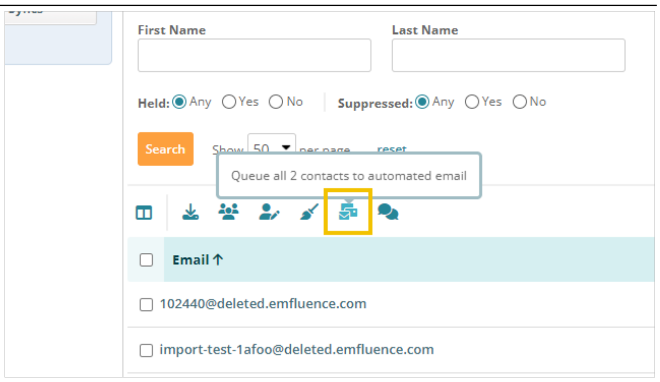
You can also add lists of contacts to groups by clicking the **Manage Groups** button above a list of contacts.



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

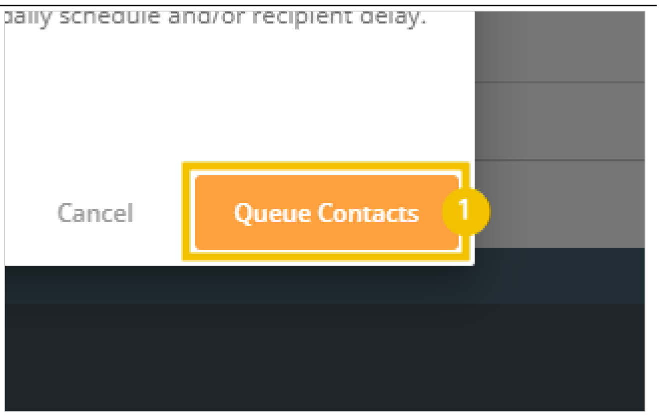


You can also use the **Queue** button to queue a list of contacts to an emfluence automated email (rather than adding them to the group). Click on the button to **Queue all contacts to automated email**.



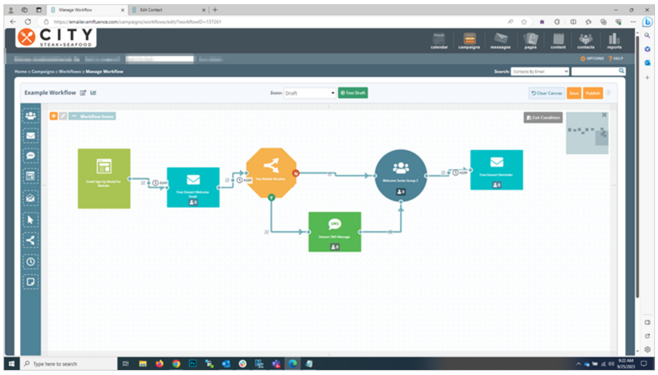
Find the automated email from the search results.

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

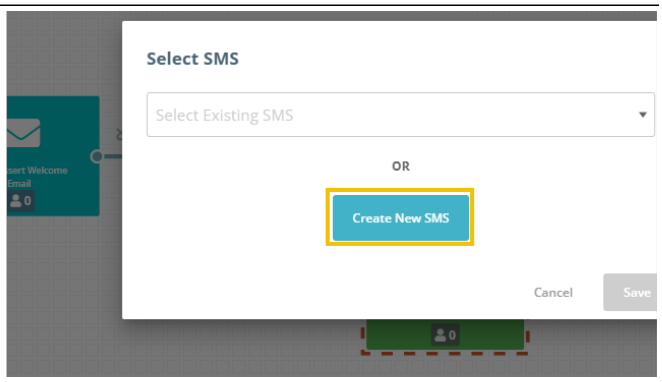
Like automated emails, automated SMS can be added to a workflow. Any contact hitting an SMS node without a number saved in the Mobile Number field will not advance. If not all your contacts have mobile numbers saved, and your flow continues past the SMS message, you may consider using a decision to allow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

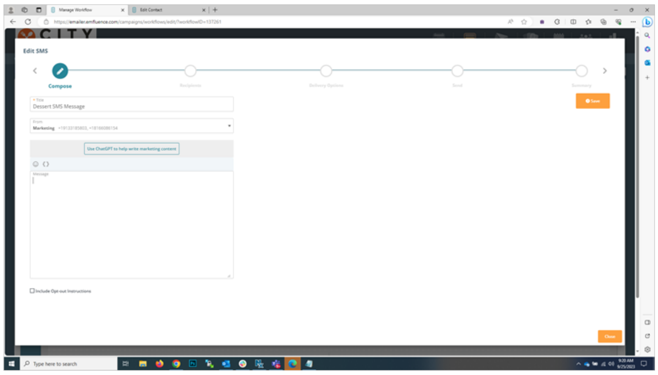
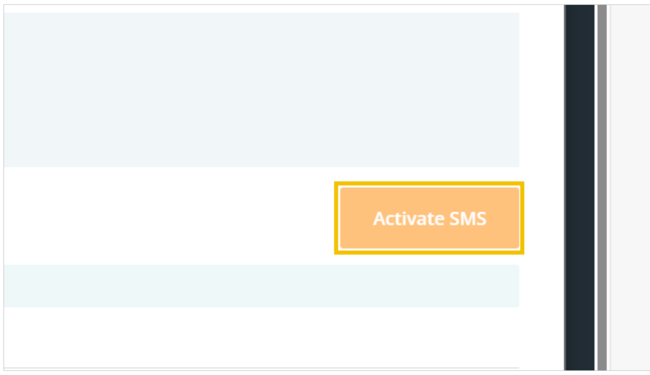
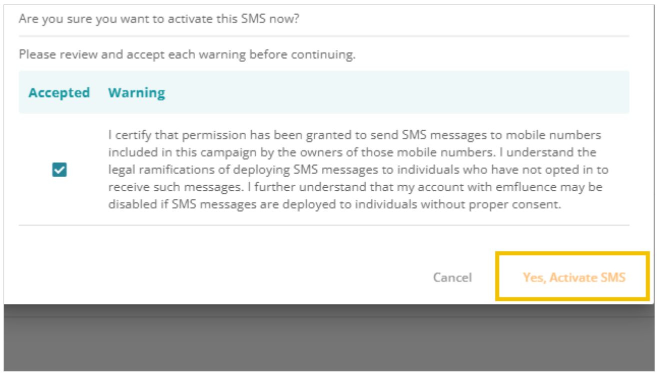


As with emails, drag an SMS message from the left-sidebar onto the workflow canvas.

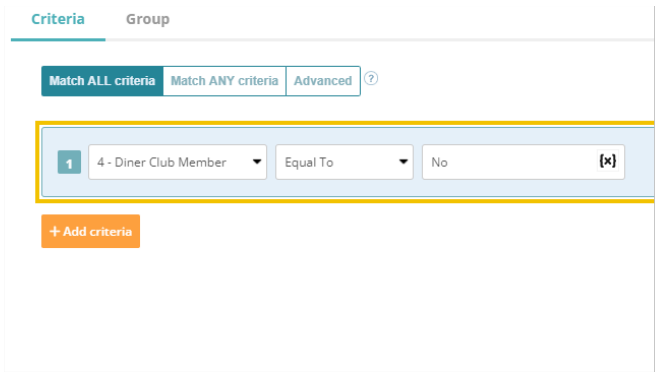
Connect the SMS message as part of your workflow.

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



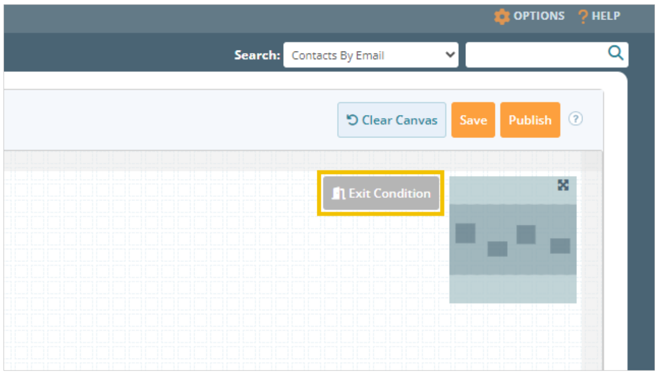
Compose your automated SMS just as you would a manual SMS message.	
On the Send step, click on **Activate SMS**.	
Confirm you have permission to send SMS to anyone added to this workflow and click **Yes, Activate SMS**.	

6.5. Exit Conditions

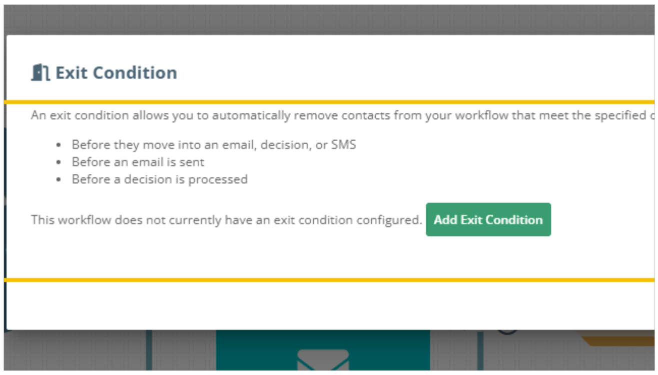
In Workflows, **Exit Conditions** can be used to insert a criteria to automatically remove any contact in the workflow (wherever they might be) when they match the condition. One example for this would be a lead nurture campaign where a contact has converted and become a customer where you would no longer 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.

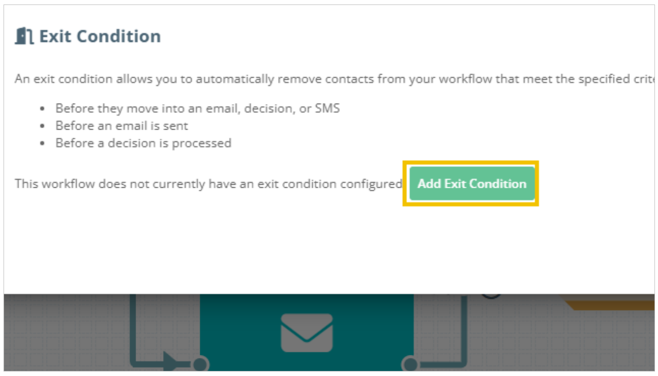
NOTE: You cannot add or edit conditions on a published workflow.



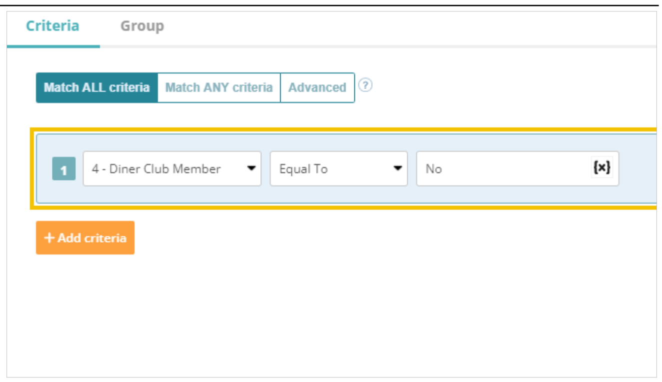
In the pop-up you will see examples of where contacts are checked for exit conditions. If they meet exit conditions at any of these points, the contacts will no longer advance in the workflow.



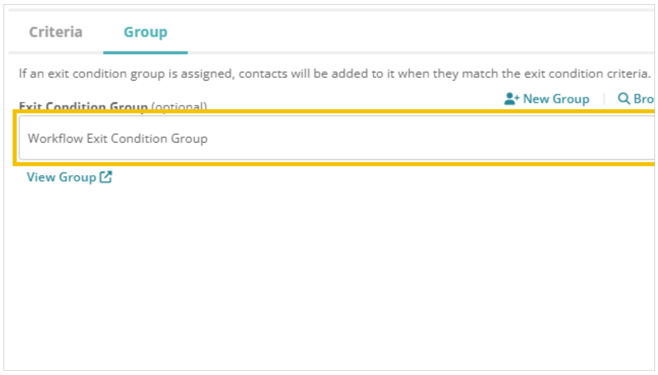
To add, click on the button **Add Exit Condition**.



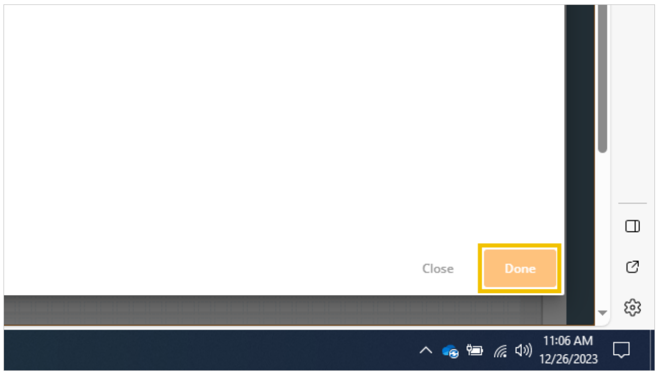
Create your query the same way you would in a Custom Decision or in Query Builder.



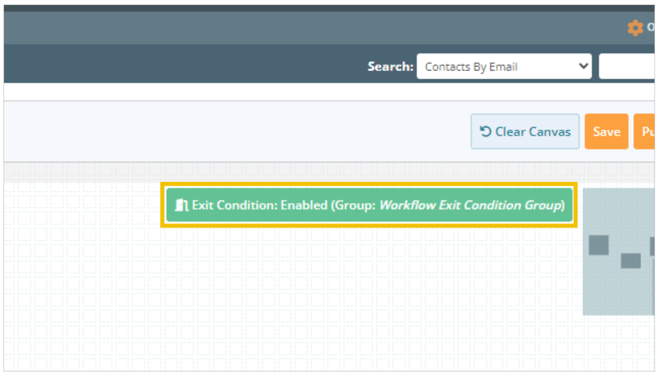
Exit Conditions will keep a list of contacts removed from the workflow. However, you may also want to have those contacts added to a static group which would easier allow you to identify them and, if you wish, market to them separately. To do so, click on the Group tab and add a group.



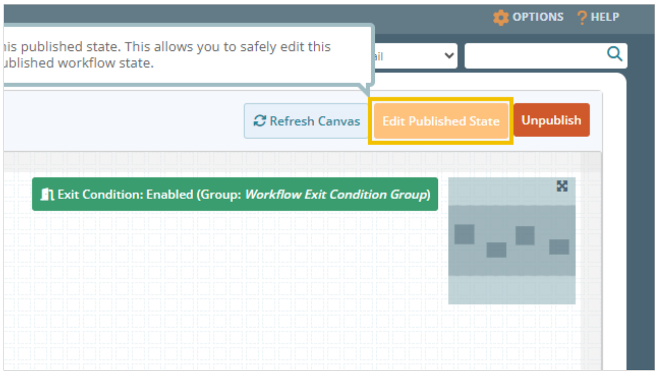
To finish, click on **Done**.



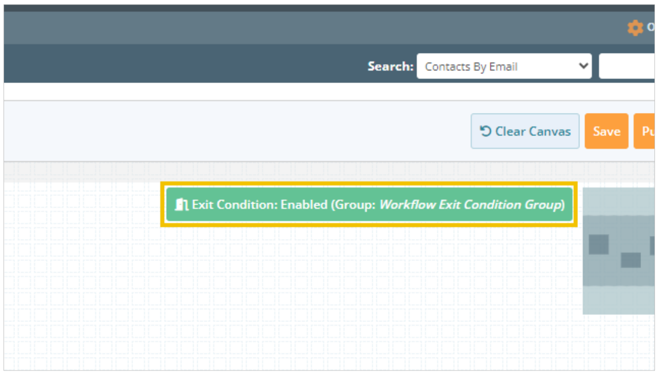
Once returned to the main worfklow canvas, you will now see your Exit Condition displayed. Don't forget to publish your workflow.



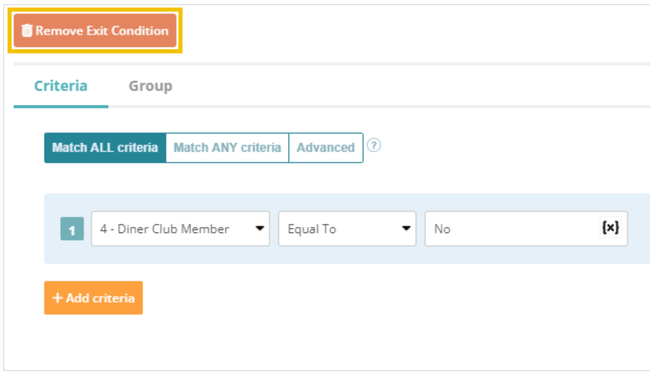
To add, remove, or edit Exit Conditions on an existing workflow, click either **Edit Published State**, which will create a new draft that you can then save over your published version, or **Unpublish**, which will unpublish your workflow.



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



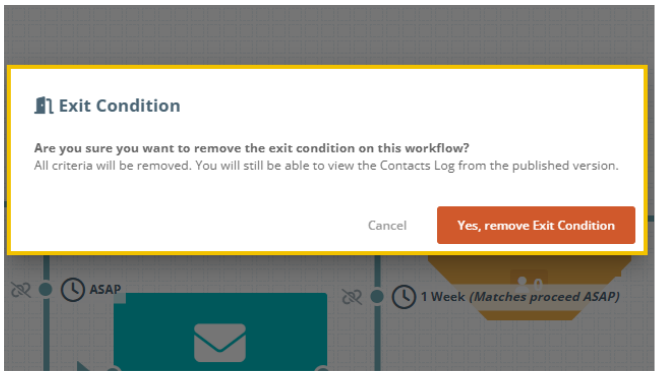
To edit your conditions, make any necessary changes to your query.
To remove Exit Conditions, click on **Remove Exit Condition**.



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.

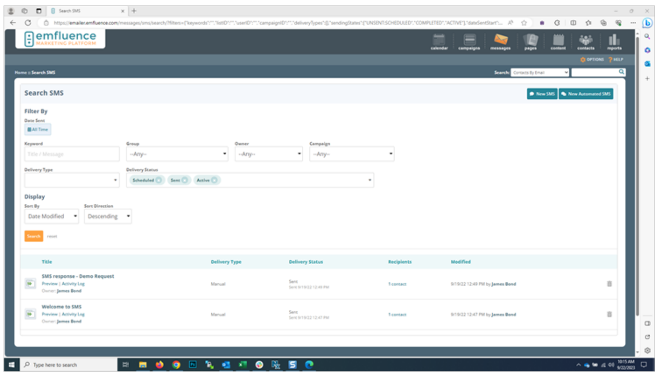
NOTE: Removing Exit Conditions will not affect those contacts already removed from your workflow.



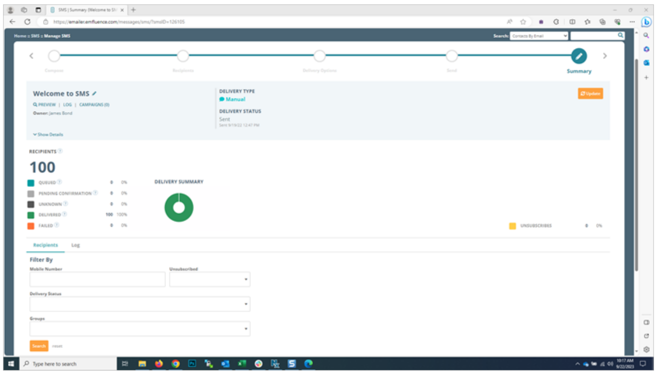
7. SMS

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

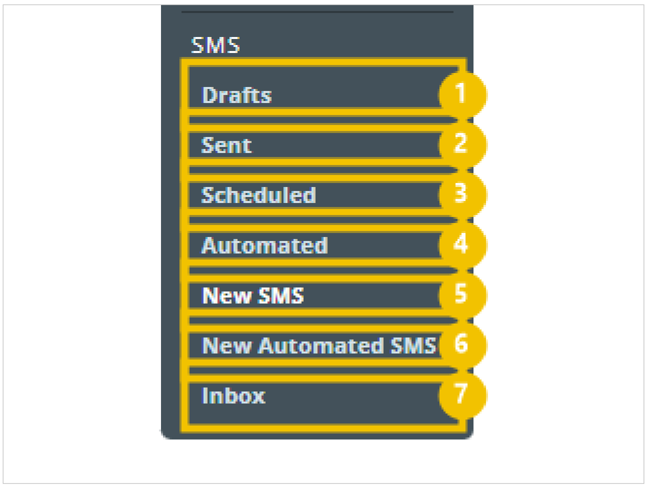
Pricing is subject to change based on fee charges from Twilio and individual SMS Carriers.

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

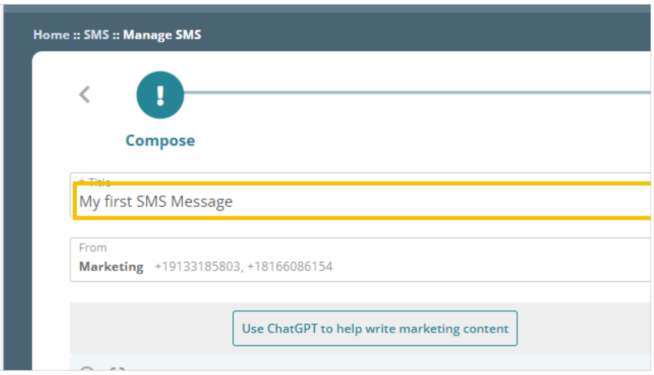
7.2. Create a SMS Message

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

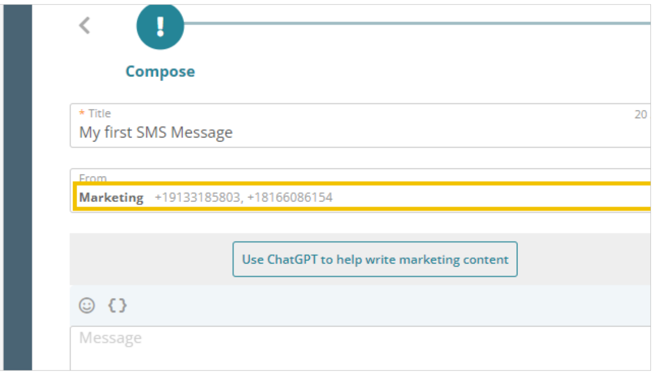
1. **Drafts**: See a list of all your existing SMS draft messages.
2. **Sent**: See a list of all your previously sent SMS messages.
3. **Scheduled**: See a list of all your currently scheduled SMS messages.
4. **Automated**: See a list of all your current automated SMS messages.
5. **New SMS**: Create 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).



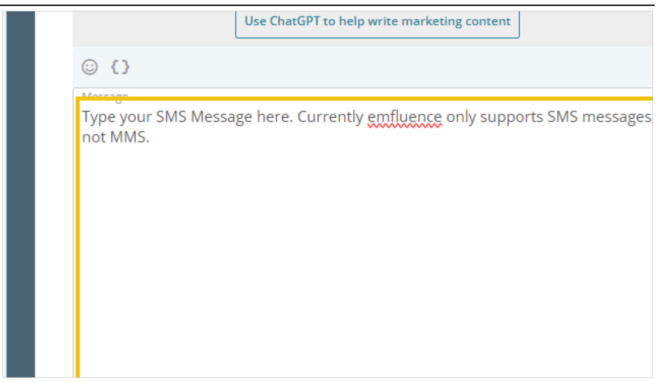
The compose process is similar to that of creating and deploying an email. First, create an internal title for your SMS message.



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.

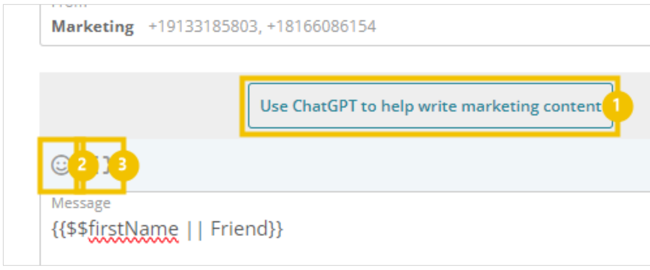


Click into the main message window and type or paste your message. emfluence currently only supports SMS messaging, it does not currently support MMS sends.

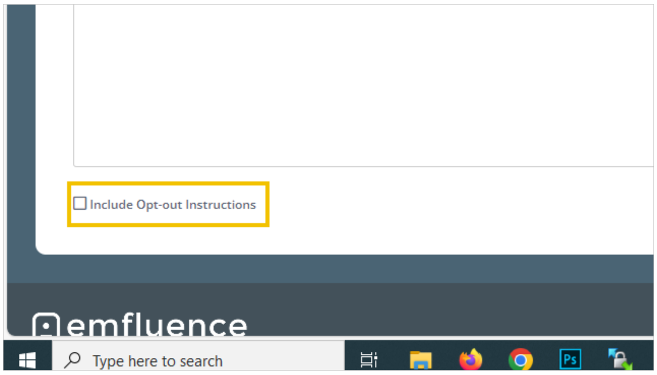


You can make use of the icons above the message window to help add content to your message.

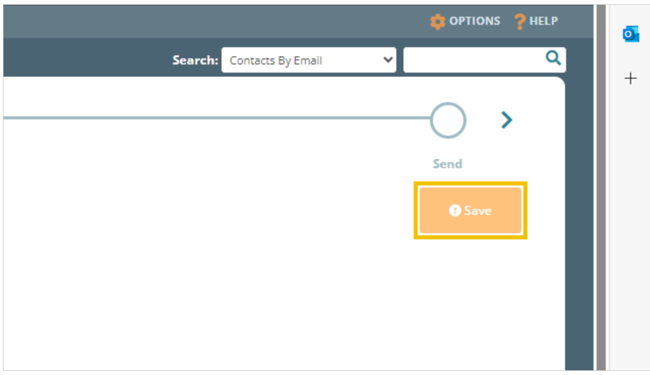
1. **ChatGPT**: Use ChatGPT to help write your message.
2. **Emoji**: Click to insert an emoji
3. **Insert Variables**: Click to insert a variable



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

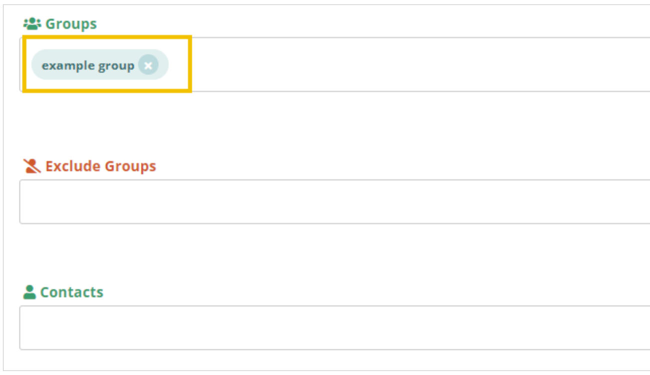


Click **Save** and then advance to the **Recipients** step.



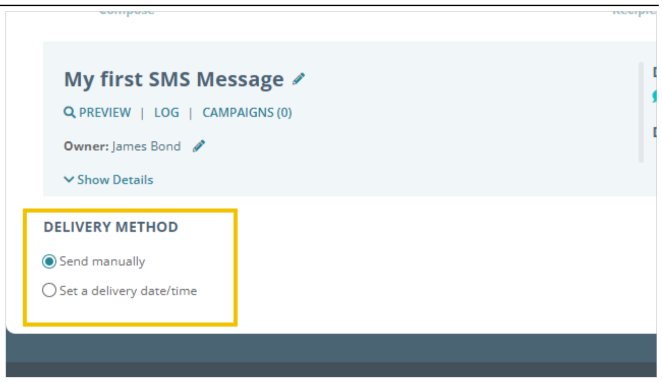
Choose your groups just as you would for an email send. The counts will only display based on contacts who have a phone number saved in their Mobile Number field. Any contacts within those groups without a mobile number cannot be included in the send.
Automated SMS will be fed as part of a workflow, so no recipients need to be chosen for an automated SMS message.

Save and continue.



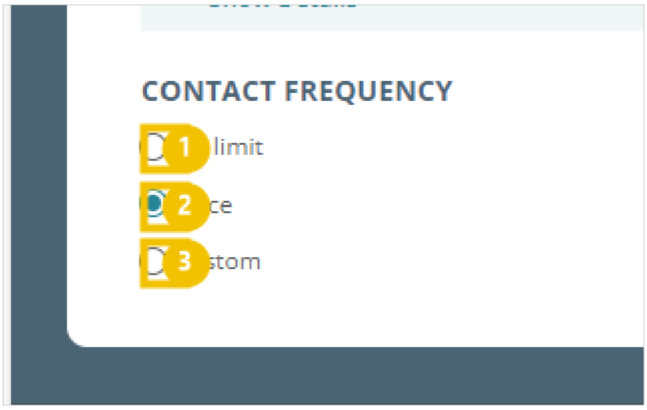
For a manual SMS message, delivery options work they same as they do on a manual email send. Choose either to send now, or choose a date and time in the future for your send to deploy.

Save and advance to the Send step.

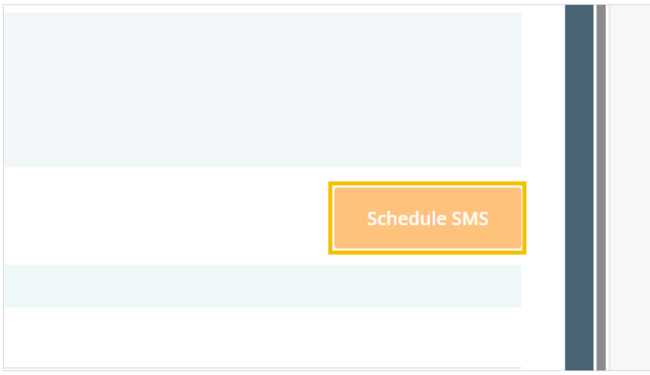


For automated SMS messages you will need to set the frequency how often someone could be queued up to receive this message. NOTE: They would still need to reach the SMS message in the workflow at a later date to be able to receive the message an additional time even if additional sends are allowed here.

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.

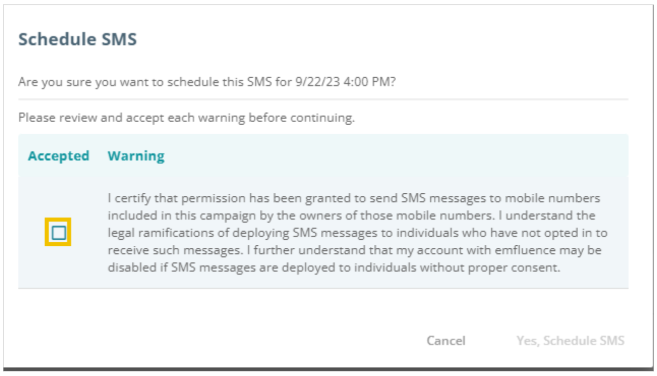


Advance to the Send step and if no errors need to be addressed, click on the **Send** / **Schedule** / **Activate** button to deploy your SMS message.



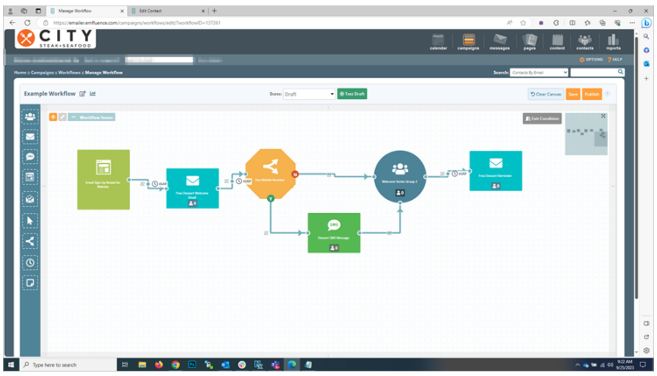
After clicking the send button, you will need to verify you have permission to send to the numbers in your list(s). Twilio and SMS Carriers take the legality of SMS opt-in very seriously. Sending to numbers without consent may lead to your account being shut down and possible legal repercussions as well.

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



7.3. Add SMS to a Workflow

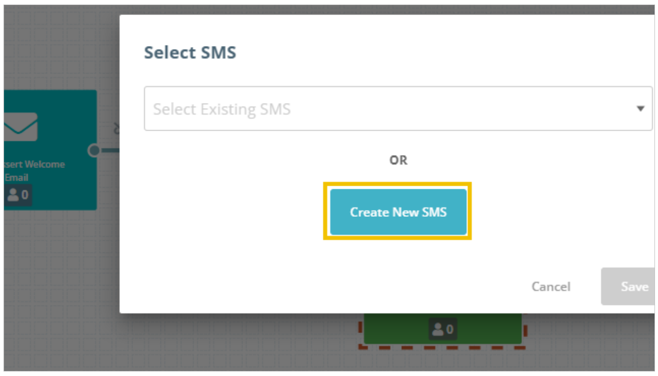
Like automated emails, automated SMS can be added to a workflow. Any contact hitting an SMS node without a number saved in the Mobile Number field will not advance. If not all your contacts have mobile numbers saved, and your flow continues past the SMS message, you may consider using a decision to allow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



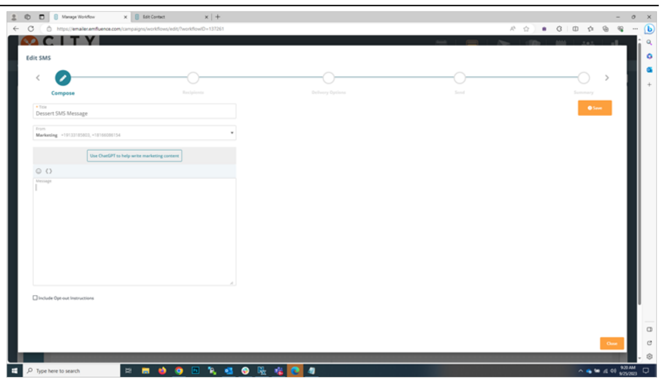
As with emails, drag an SMS message from the left-sidebar onto the workflow canvas.

Connect the SMS message as part of your workflow.

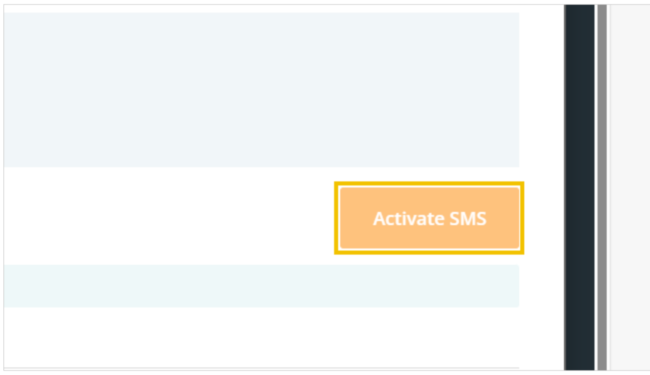
Either choose an existing automated SMS message from the dropdown menu or click on the button **Create New SMS**.



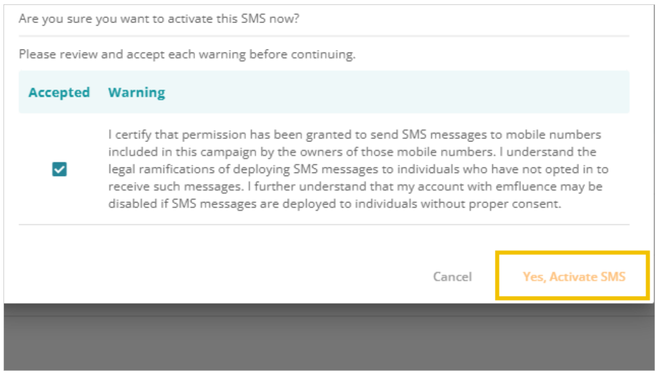
Compose your automated SMS just as you would a manual SMS message.



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



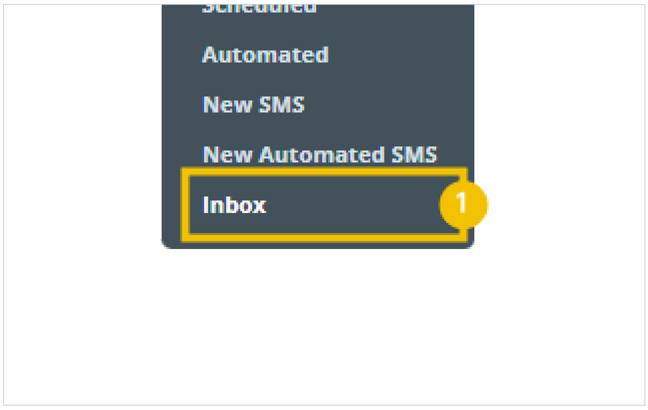
Confirm you have permission to send SMS to anyone added to this workflow and click **Yes, Activate SMS**.



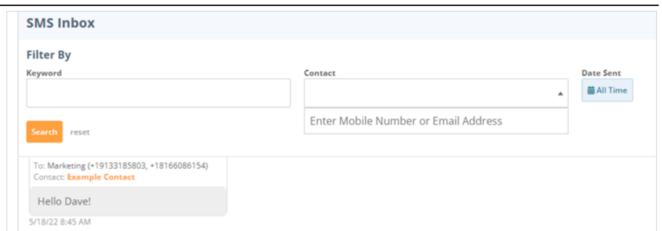
7.4. SMS Inbox

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.

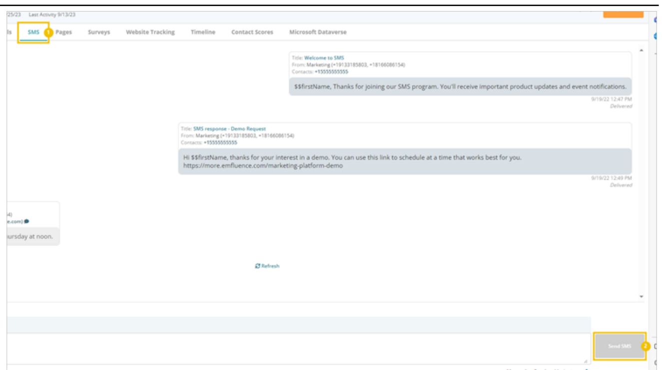


Messages deployed from emfluence will be displayed on the right-side of the screen. A response from a contact will be displayed on the left. Use the Filter options to limit your search to specific keywords, contacts, or date ranges.



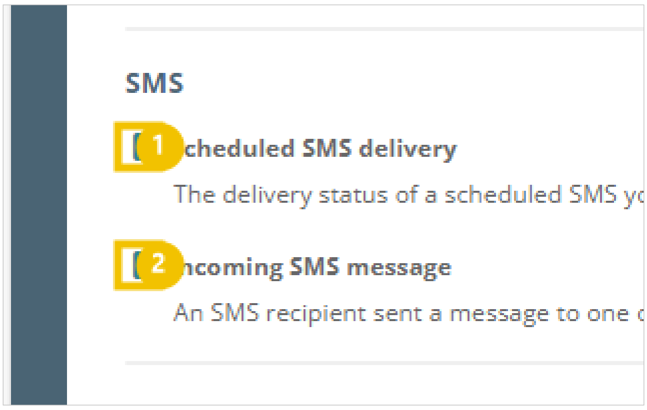
You can also find SMS history on the contact record in the SMS tab which will include all SMS messages sent to the contact and any replies messaged back.

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.

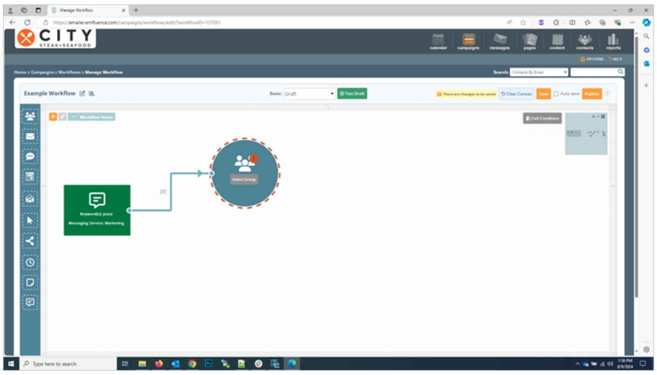


Notifications for SMS can be handled in the Options menu under Notifications. When adding or removing permissions, don't forget to save at the bottom of the page.

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.



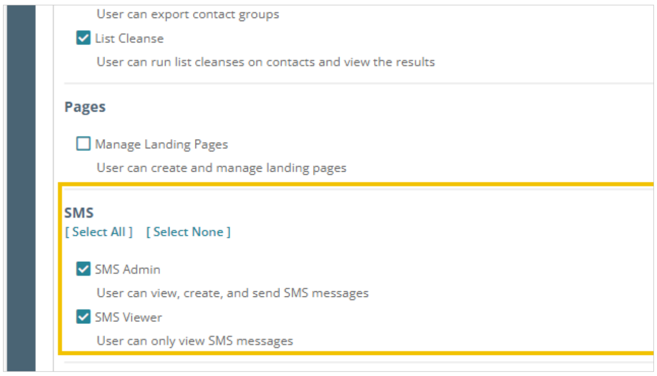
Keywords can be set up on workflows using the SMS Keyword Trigger. When the keyword is sent to your number, this trigger can kick off a workflow and advance a contact to a Static Group, Delay, Email, SMS, or Custom Decision.



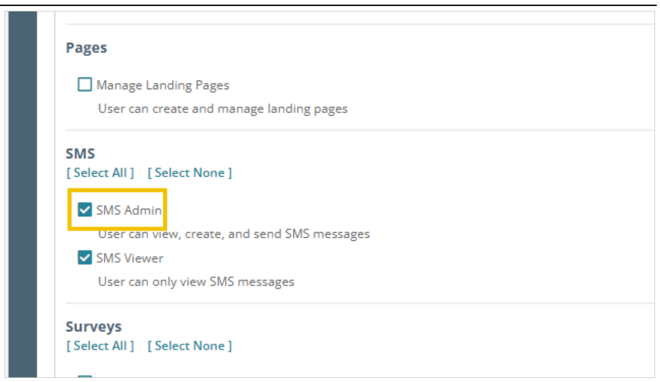
7.5. SMS Permissions

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

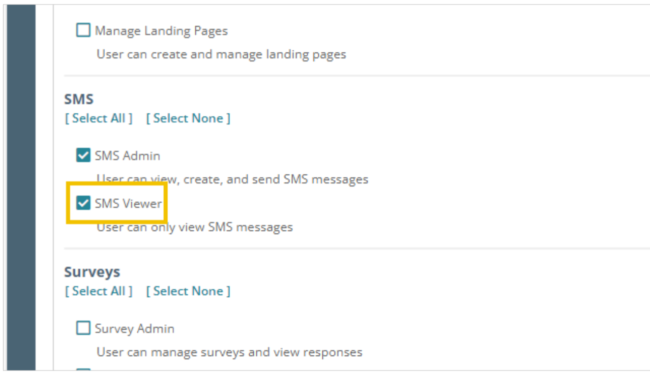
For individual users to see and interact with SMS messages, they must either be client admins in the account (who are given access to everything by default), or have one of the two specific SMS permissions on their user profile.



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



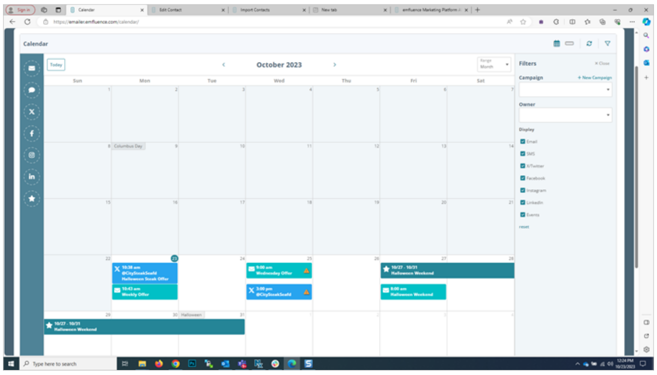
Users with the **SMS Viewer** permission can view SMS messages.



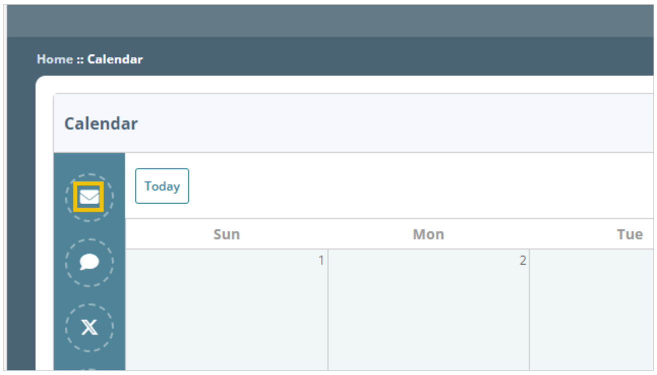
8. Calendar

8.1. Calendar Overview

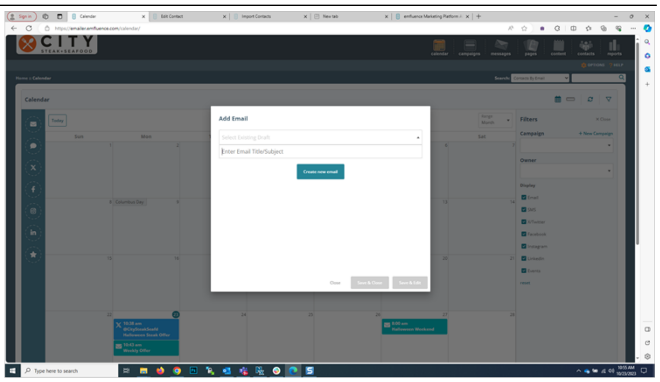
The emfluence Calendar allows you to see past messaging, and create future email and social posts, on a calendar view.



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

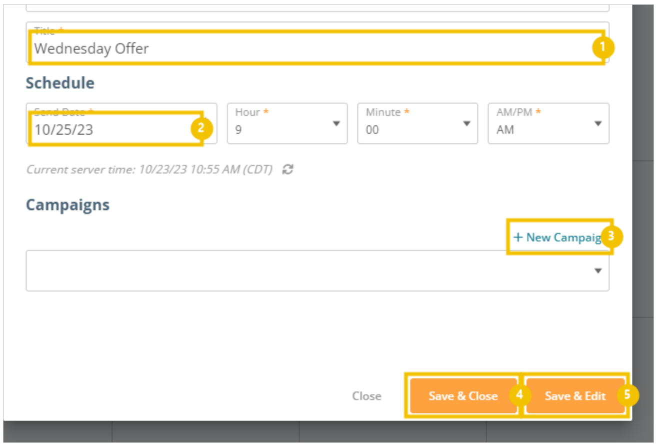


When dragging out an email, select an existing draft or create a new email without having to leave the calendar.

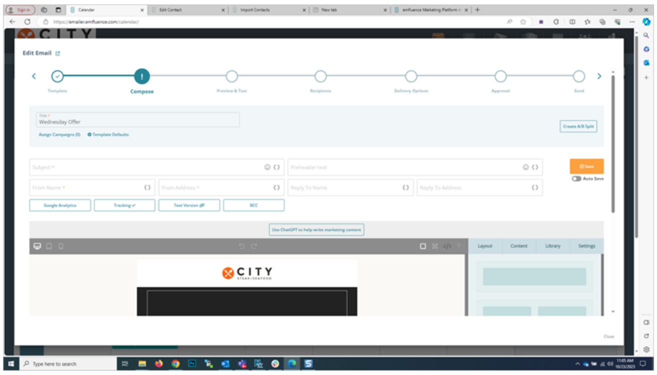


Choose your template, and fill in the starting information about your email.

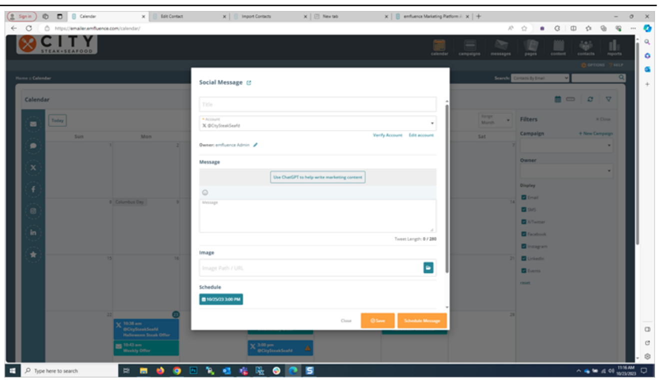
1. **Title**: Add the title of your email.
2. **Schedule**: Set the date and time of your email. This can be changed later, but in order for it to show up on the calendar a date and time must be included.
3. **Campaign**: Add to an existing campaign or create a new campaign.
4. **Save & Close**: Save 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.



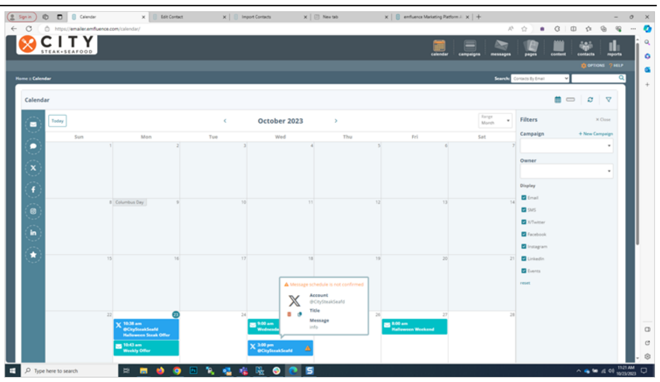
When editing an email on the calendar, the entire compose process will be iframed on your screen. You can compose your email, add recipients, and schedule your email without leaving the calendar.



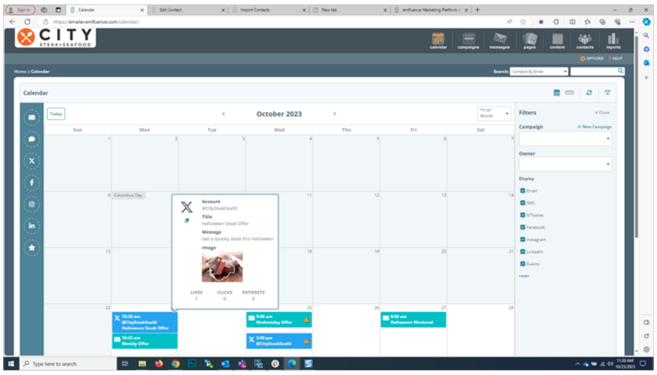
In the same way, you can drag social messages (and SMS, if enabled in your account) onto the calendar and save them as drafts or schedule them. NOTE: You will need to have the proper permissions to create these posts.



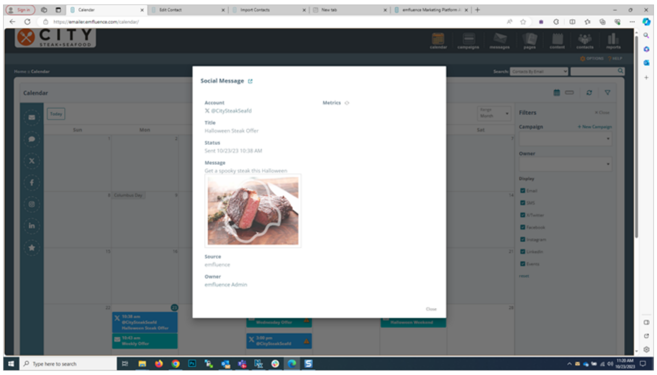
You will notice messages that have not been confirmed will have a warning symbol shown on them. Hovering over the message will provide more information. Clicking on the message will allow you to complete your message within a modal.



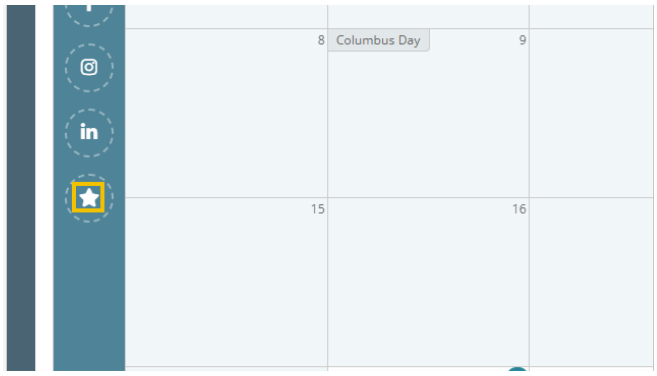
When hovering over a previously sent message, you will see information provided about the message.



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

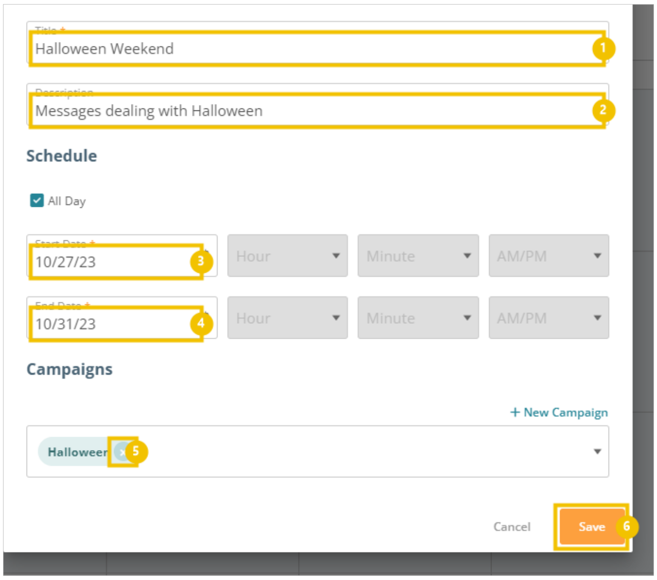


The last item on the left-sidebar is an **Event**. While an event doesn't trigger any action outside the platform, it can be used to provide helpful context to an important date or date range you want reminded about on your calendar.

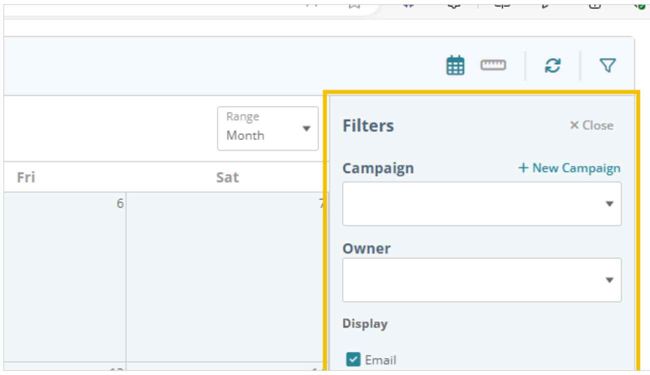


After dragging an event to the calendar, fill in the settings in the modal.

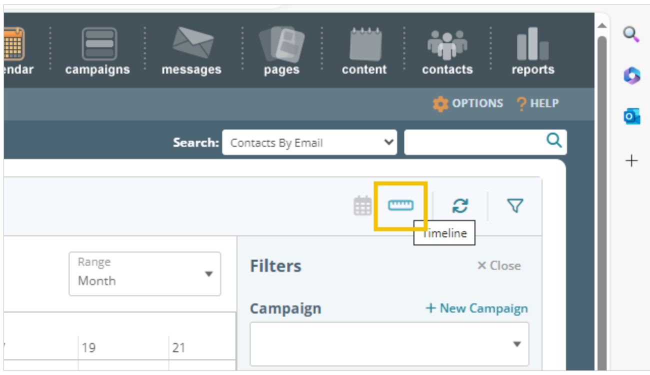
1. **Title**: Name your event
2. **Description**: Provide an optional description about your event.
3. **Start Date**: Set a start date for your event. You can set a specific time or you can leave the all day box checked.
4. **End Date**: Set an end date for your event.
5. **Campaigns**: Add any campaigns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



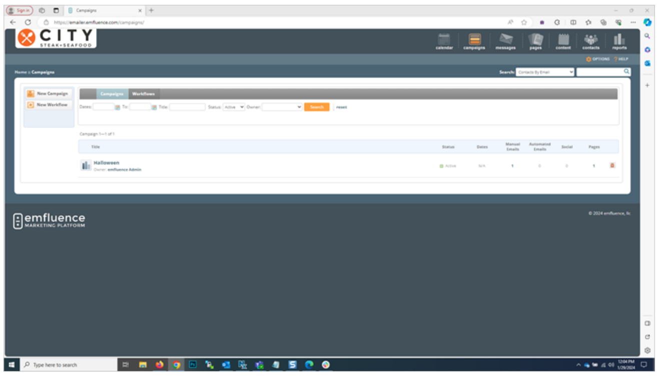
By clicking on the **Timeline** icon, you can see your posts placed on a timeline rather than in the default calendar view. The same filters can still be applied in the timeline view.



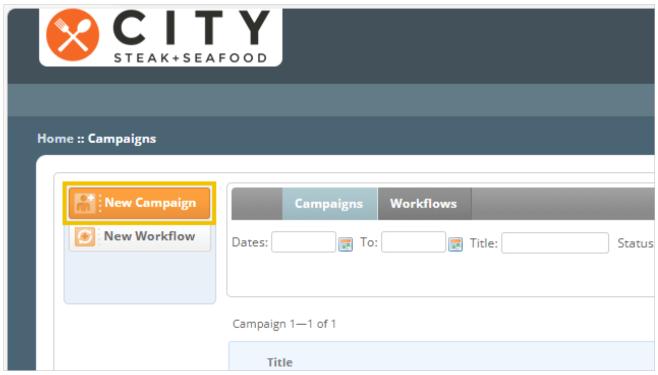
9. Campaigns

9.1. Creating Campaigns

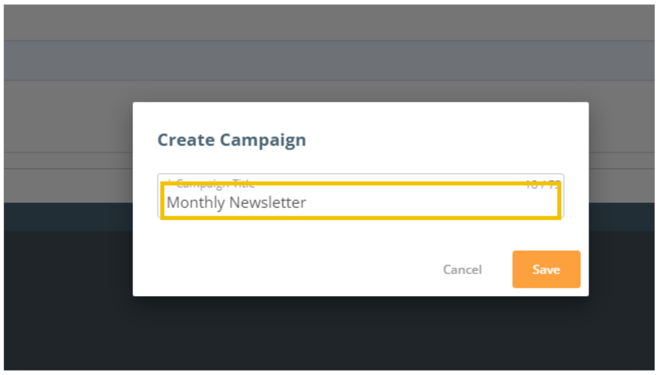
Located within the Campaign menu, Campaigns can be created to organize emails, surveys, landing pages, and more for reporting purposes.



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

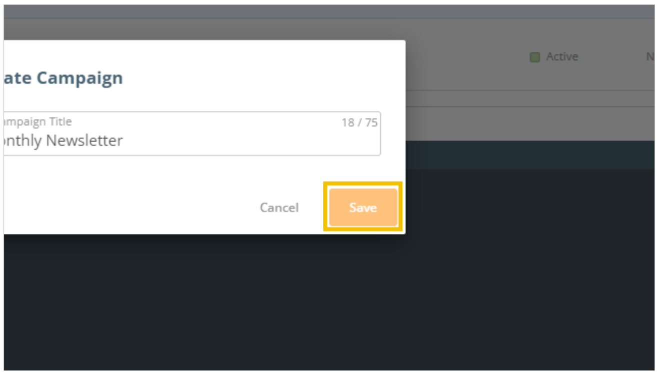


In the pop-up, fill in your campaign title.

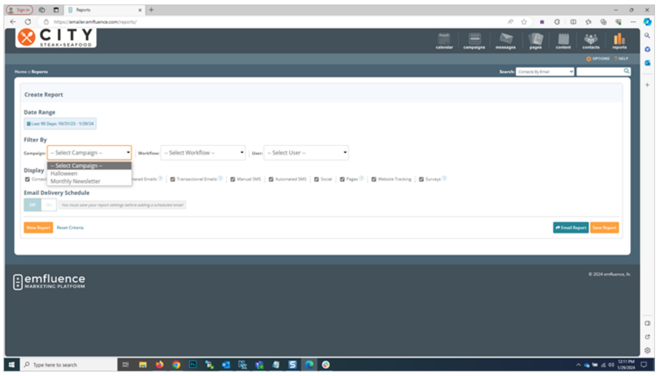


Click **Save**.

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

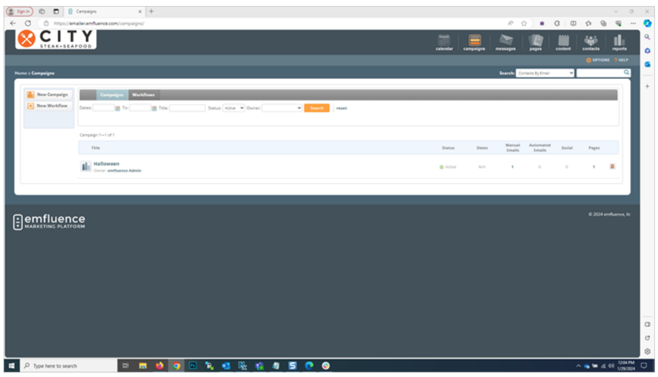


Once campaigns exist, you will be able to choose one as a filter in the Reporting section to limit your reporting to only items within that campaign.



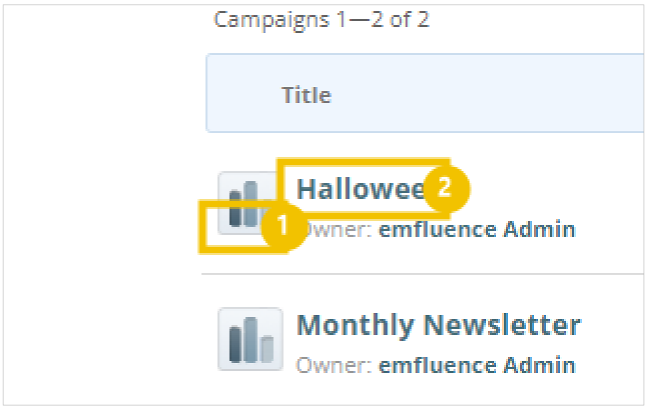
9.2. Adding to Campaigns

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

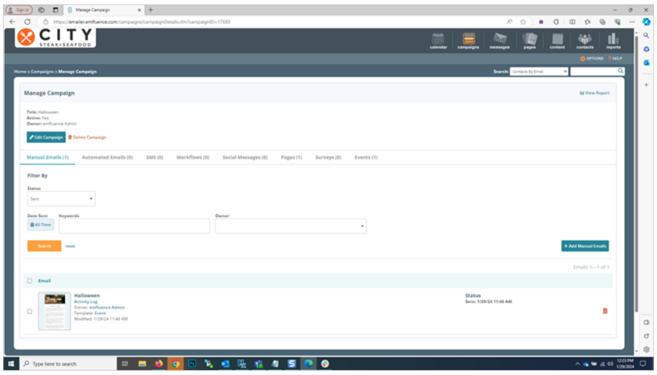


On the main campaign page, all of your campaigns will be listed along with filters to search for campaigns. For each campaign, the numbers of manual & automated emails, social messages, and landing pages will be shown.

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

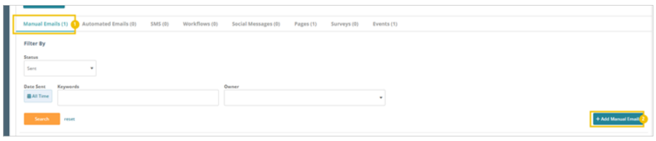


Click on any of the tabs within the Manage Campaign page to see what is already part of the campaign and add/remove more items to your campaign.



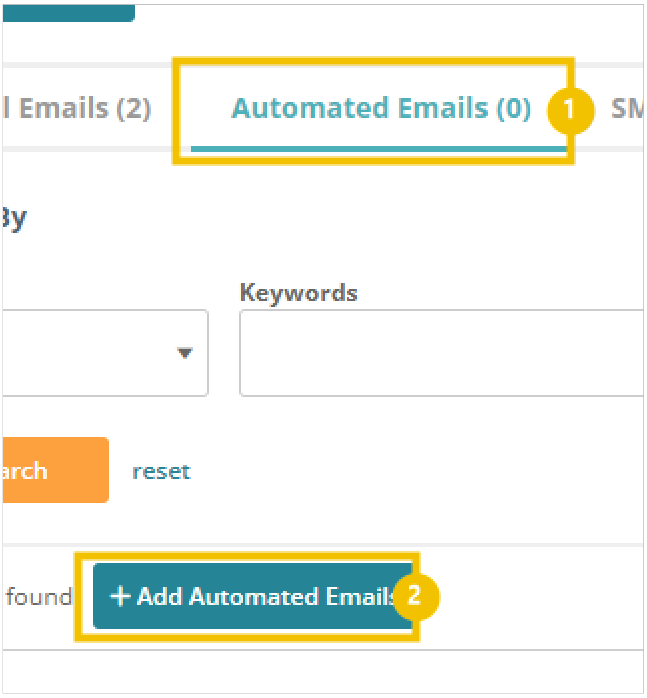
Manual Emails

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.



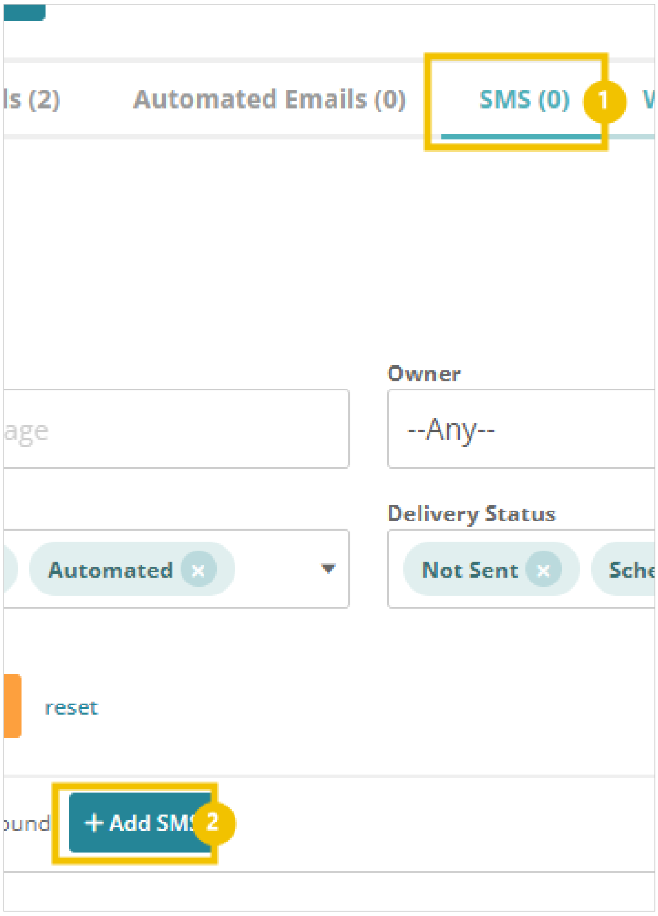
Automated Emails

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.



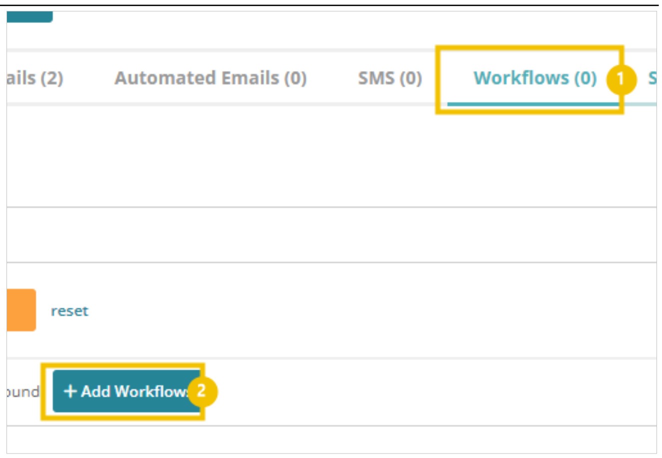
SMS

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.



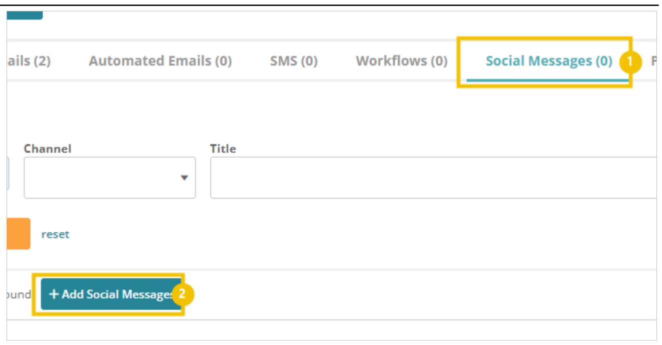
Workflows

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



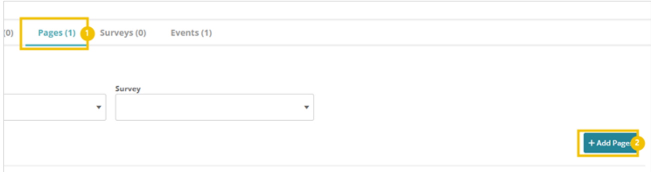
Social Messages

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.



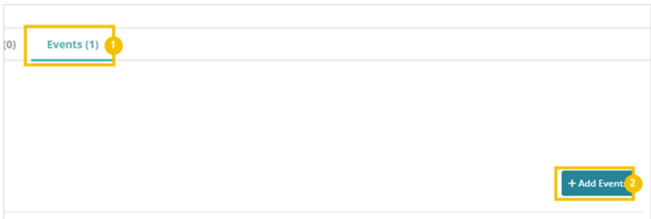
Landing Pages

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.

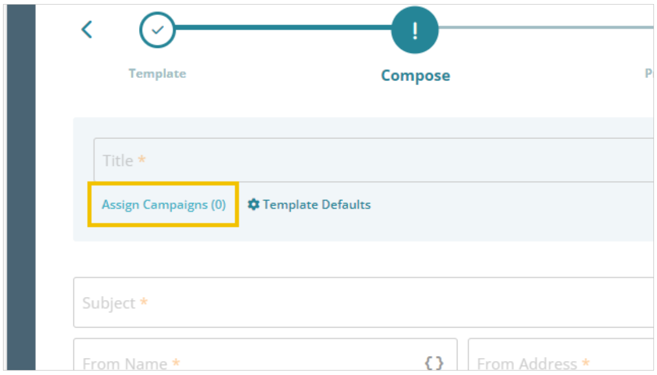


Events

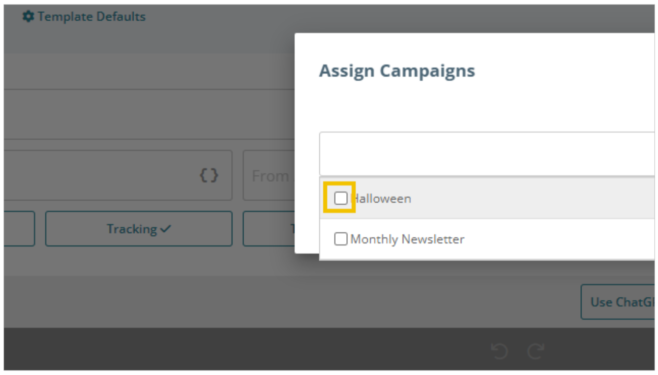
1. **Events**: Calendar Events included in your campaign will be shown here.
2. **Add Events**: Click the button to add additional events to your campaign.



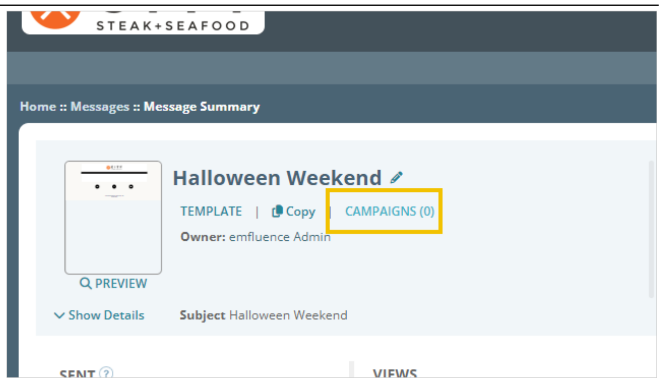
When making new emails and social messages you can assign campaigns as you make them by clicking on the option to **Assign Campaigns**.



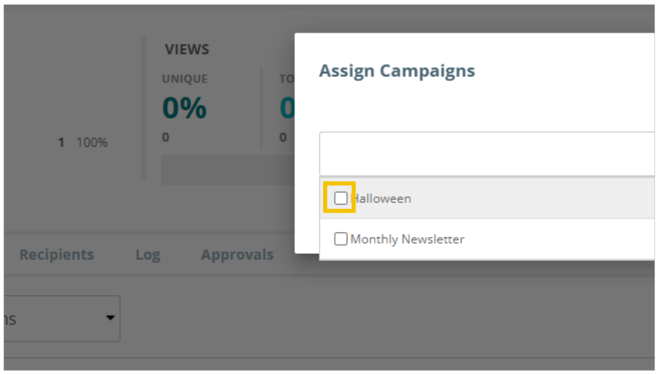
In the pop-up, choose the campaign(s) you want to assign this message to and Save.



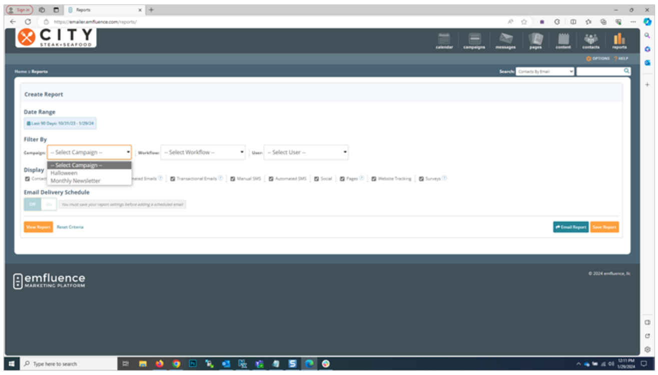
You can also assign sent emails to campaigns by clicking the **CAMPAIGNS** button on the summary page.



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



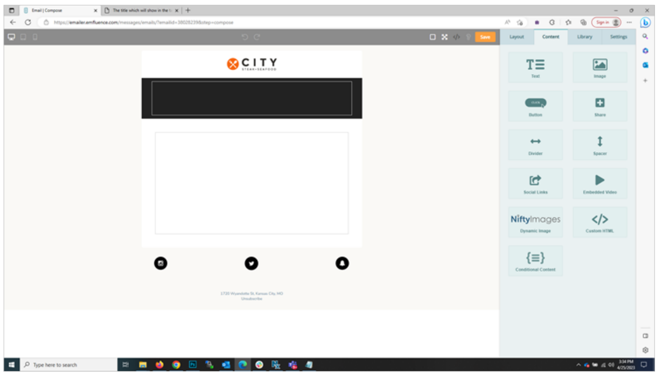
In the Reporting section, you can choose a campaign as a filter to limit your reporting to only items within that campaign.



10. Drag & Drop

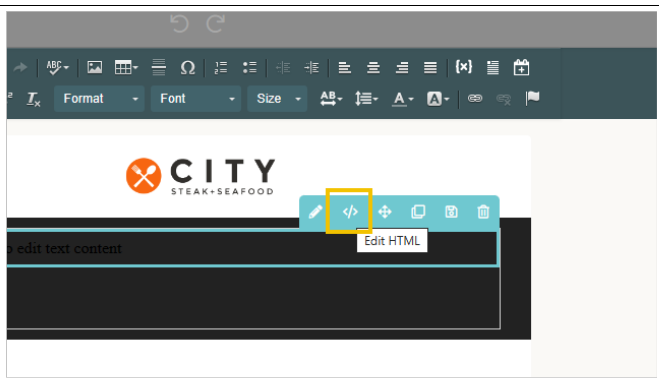
10.1. Drag & Drop Elements

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.

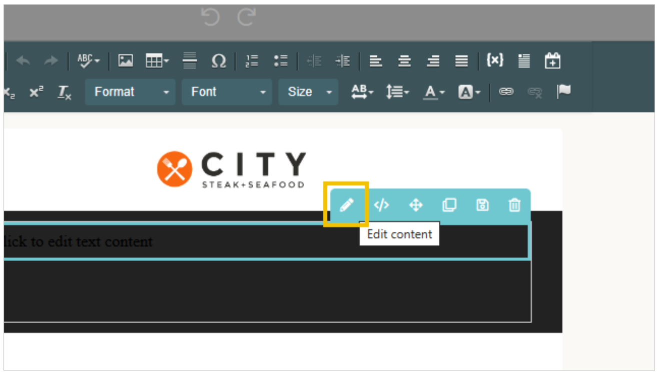


At the top of all elements, when clicked on, a menu will appear. Each button will allow you to edit, move, save, or delete content. Not all elements have all icons available.

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.



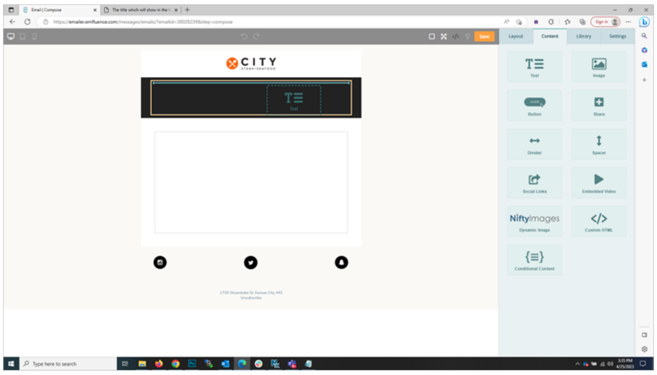
The **Copy** button will create a copy of what you have selected. If you have a layout selected, everything within that layout will be copied.

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.

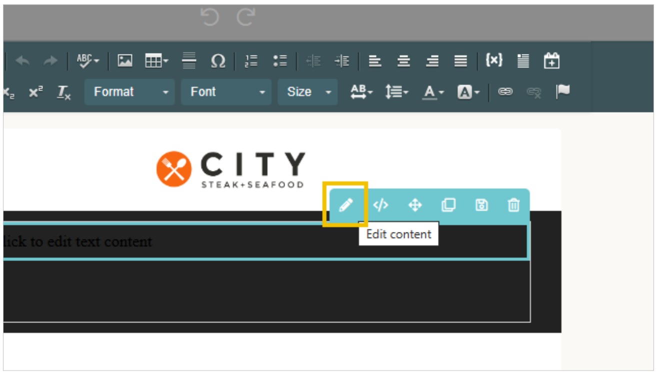
10.1.1. Text Elements

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

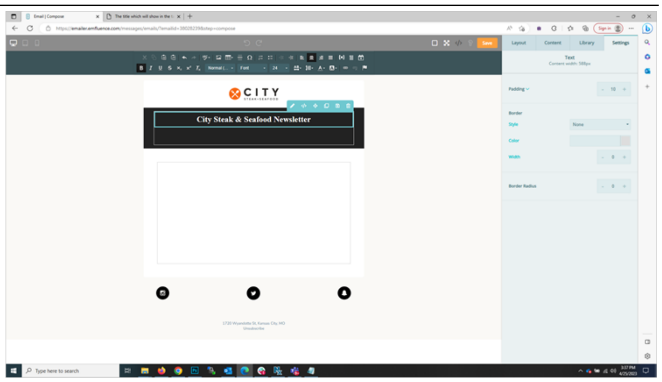


Clicking the pencil on a Text element will launch the wysiwyg editor at the top of the screen. A standard web editor, hovering over any of the icons will provide information about each item in the menu.

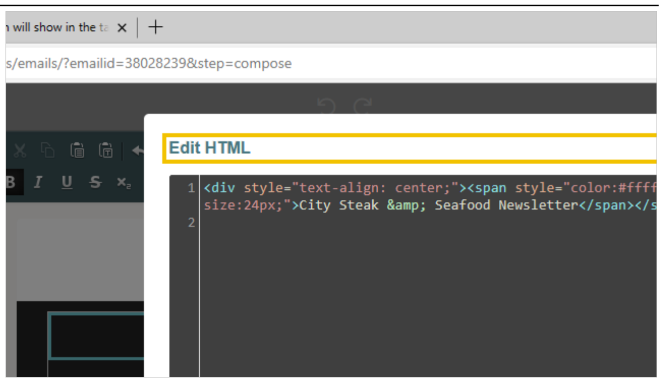
NOTE: Most options on elements is provided in the right Settings section. While some options do appear for the Text element, most of its menus instead appear in the editor at the top of the screen which is only visible when you are clicked into the element.



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.

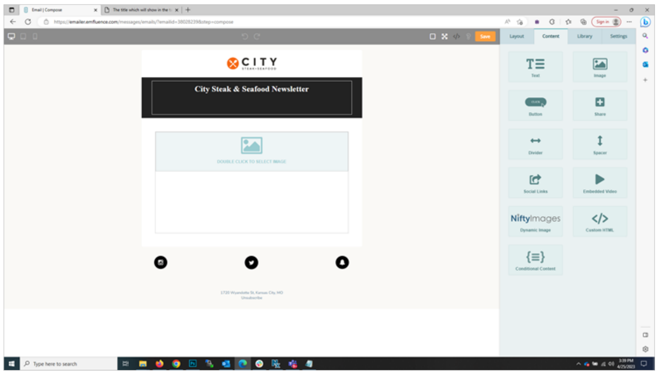


You can click on the icon to view and edit the HTML of your text element if you wish.

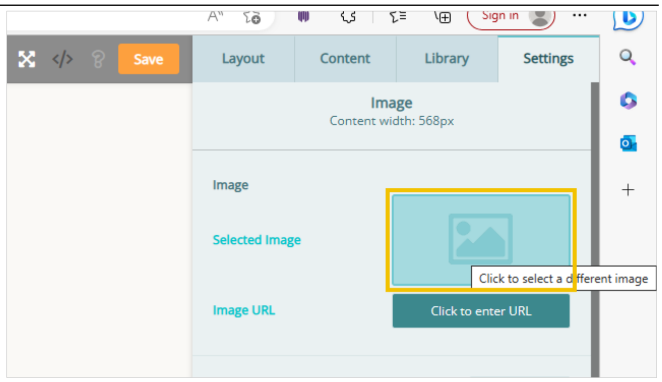


10.1.2. Image Elements

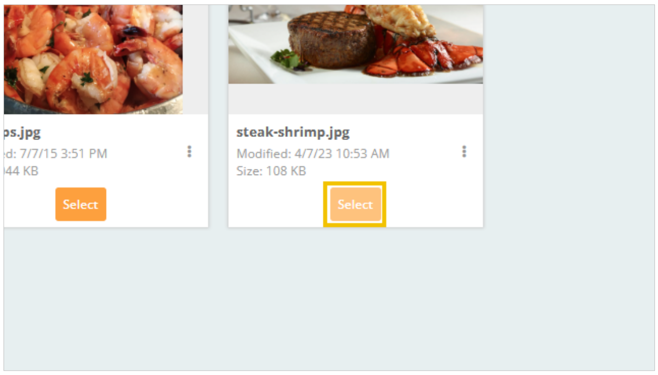
You can drag an Image element into an editable area, either directly into your email or place it within a layout.



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.

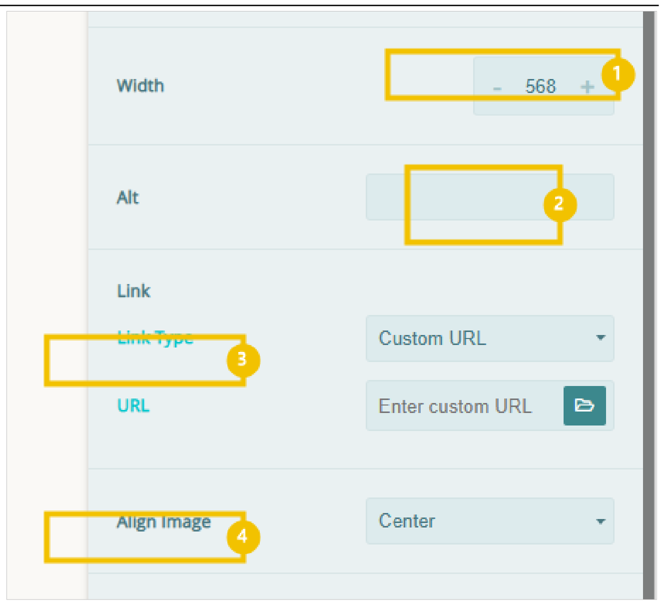


To insert an image, click **Select**.



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

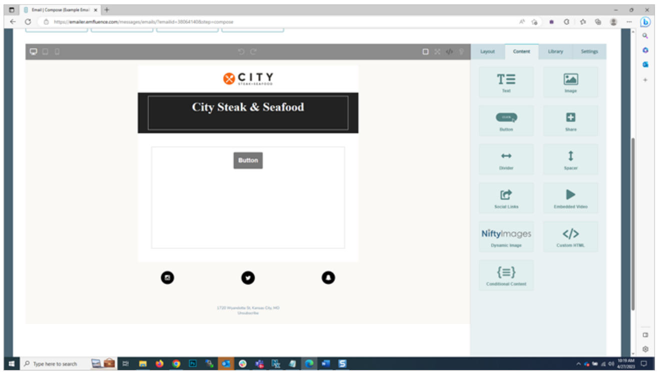
1. **Width**: By default, the image element will display the full width of an image up to the max area allowed by the template. While you can increase this size manually, you will be warned when doing so as it could allow your image to break out of your template and push content outside of the designed 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.



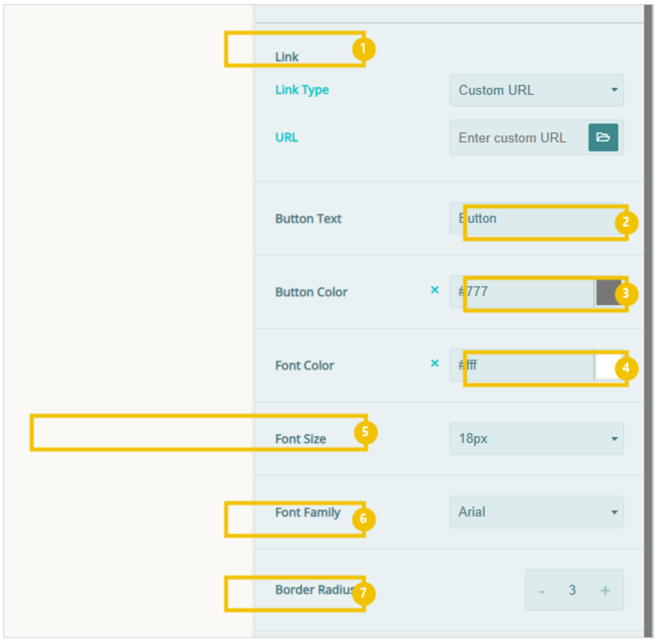
4. **Set Alignment**: Set the alignment of your image which will be Center by default.

10.1.3. Button Elements

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



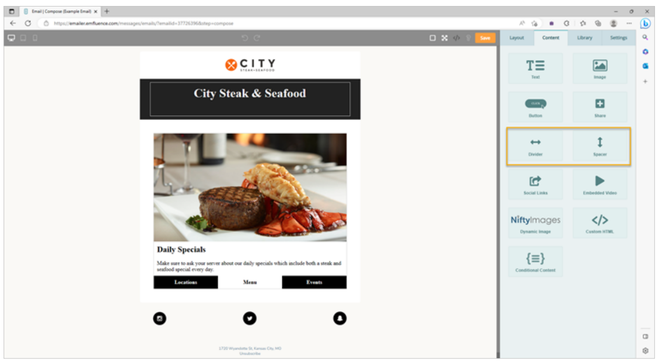
In the Settings menu, you can set options for your button including adding a link and stylizing the button.



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

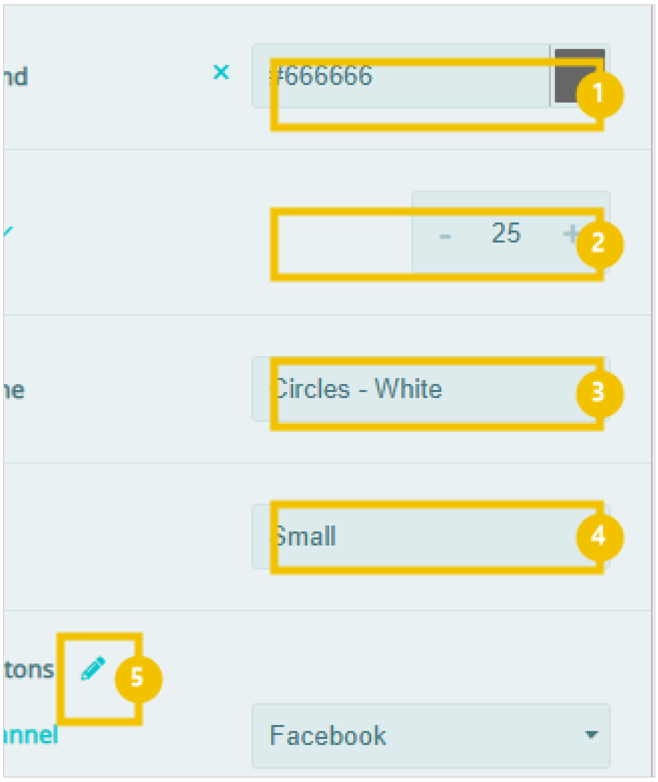
Dividers and **Spacers** can be dropped in to provide horizontal space between two sections of an email. These will allow you to quickly add space without having to pad the surrounding elements. The **Divider** will provide a break line of any color you choose. The **Spacer** will only include space. 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 hightlight a specific social channel in a message.

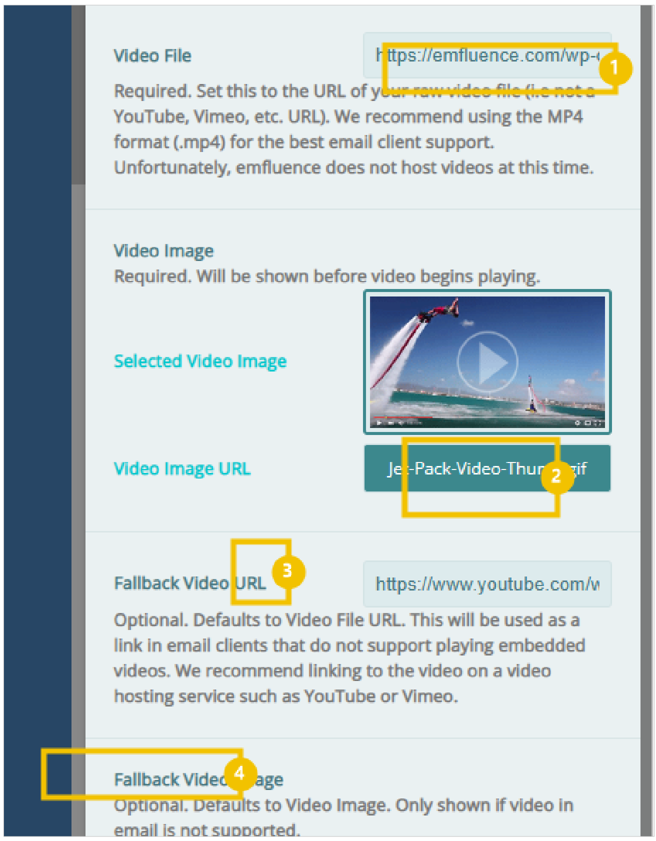
1. **Background**: Set the Background color of your element, or remove it completely.
2. **Padding**: Set the Padding of your element.
3. **Icon Theme**: Choose between white circles, black circles, or the individual icons shown in their brand colors as either circles or squares.
4. **Icon Size**: Set 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)

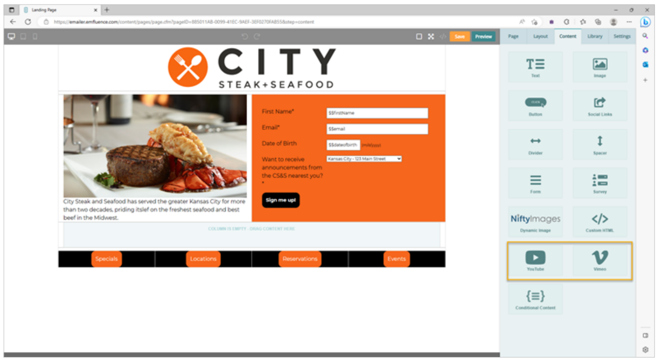
You can embed a video file to play in an email (in inboxes which allow video to be played). You will need to have a hosted file in mp4 or similar format.

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)

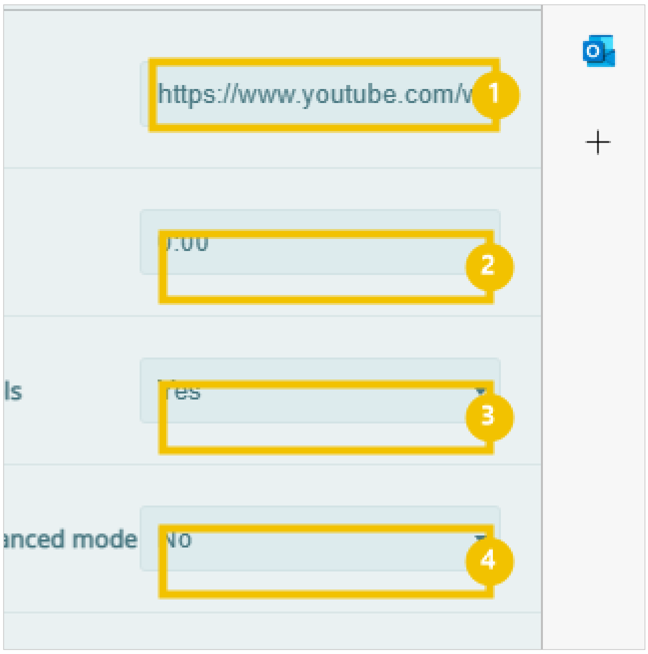
On **Pages**, you can drag out **YouTube** and **Vimeo** elements to add videos from those platforms. For embedded video from other platforms, you can use the custom HTML element.



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.

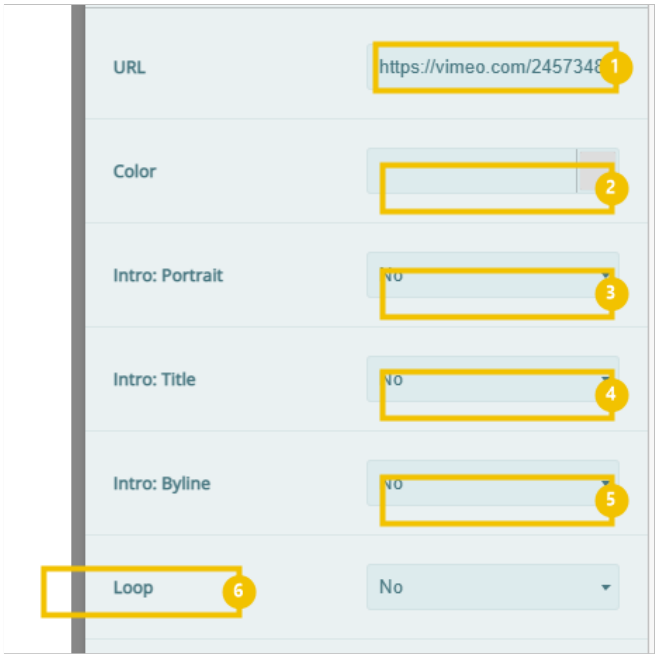
1. **YouTube URL**: Paste the URL of the YouTube video here.
2. **Start At**: By default, the video will start at the beginning. However, if you wish it to start later, you can type in a different starting time.
3. **Show Player Controls**: Show or hide player controls.
4. **Enable privacy-enhanced mode**: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



10.1.7.2. Vimeo

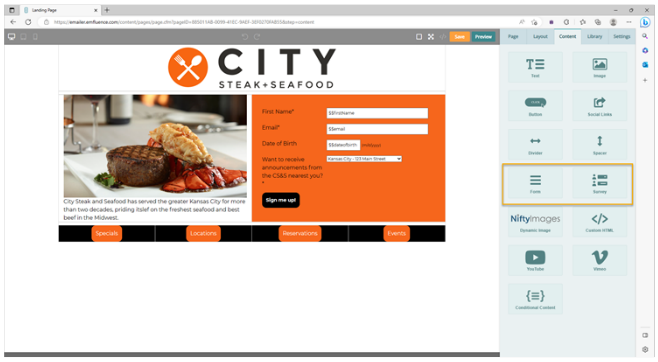
Drag a Vimeo element and drop it on the page. Paste in the URL and change any settings in the Settings panel on the right-sidebar.

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.



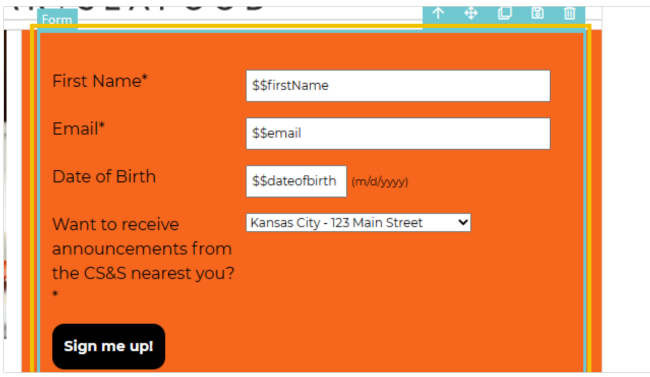
10.1.8. Forms & Surveys (Page Only)

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.

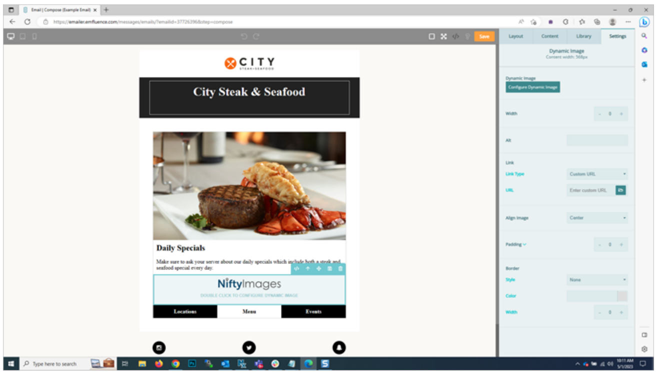


10.1.8.2. Surveys

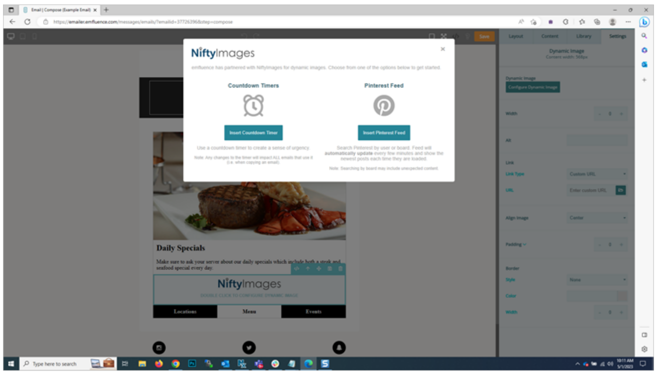
After dragging a **Survey** on to a page, you can either choose an existing survey from the dropdown or create a new survey. Any formatting on the survey will overwrite the page formatting.

10.1.9. Nifty Images

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

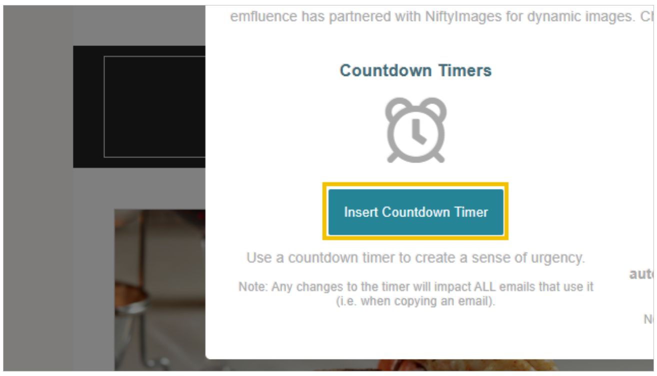


Clicking Configure Dynamic Image will allow you to choose from the types of NiftyImages you can add to your email.

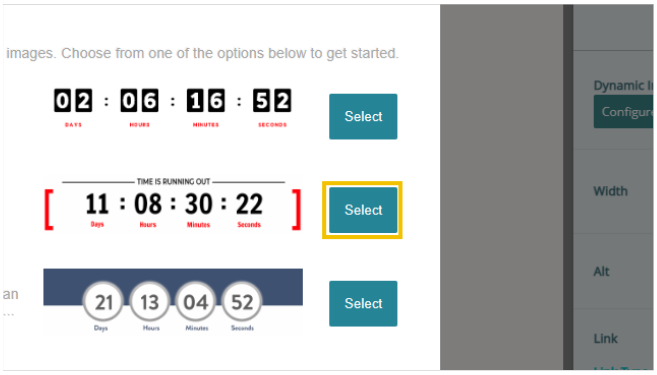


10.1.9.1. Countdown Timers

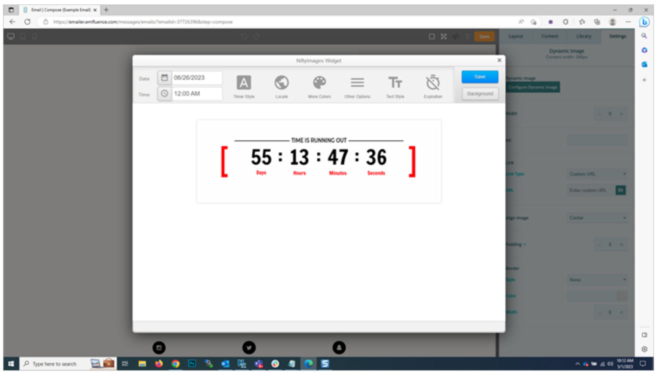
Click on **Insert Countdown Timer** to add a countdown timer to your email.



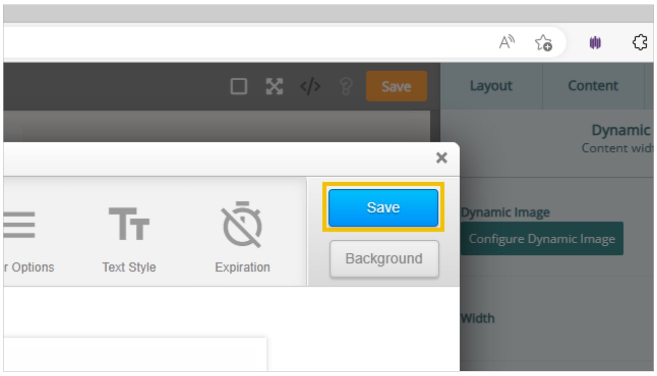
Click on **Select** to choose from the different types of timers available. You will be able to edit fonts and colors on the next step.



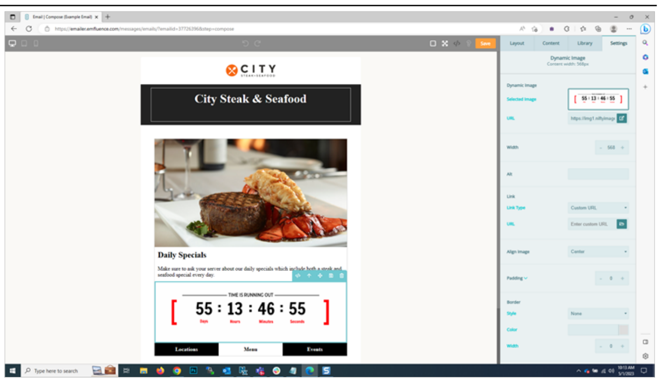
Change the date and time to when you wish the countdown to expire. Change any additional settings to alter the look of the countdown timer.



Click on **Save**

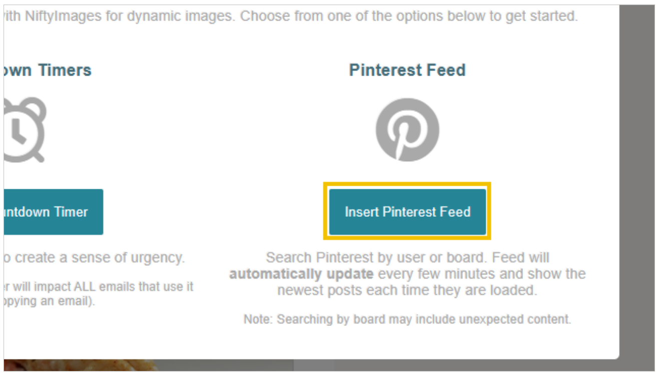


You will now see your Countdown Timer inserted in your email.

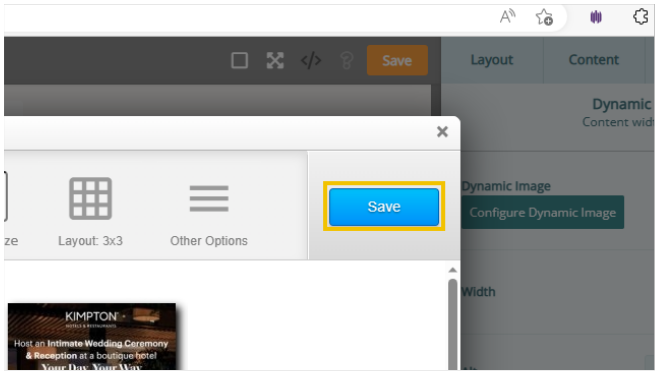


10.1.9.2. Pinterest Feed

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

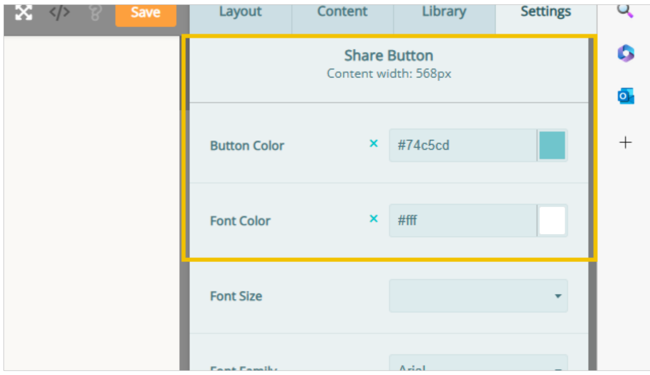


Search for a user or board you wish to create a Pinterest Feed for. The feed will be created automatically. Click on **Save** to insert your board into your email.



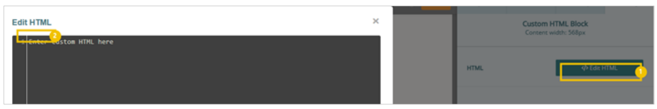
10.1.10. Share Button (Email Only)

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.

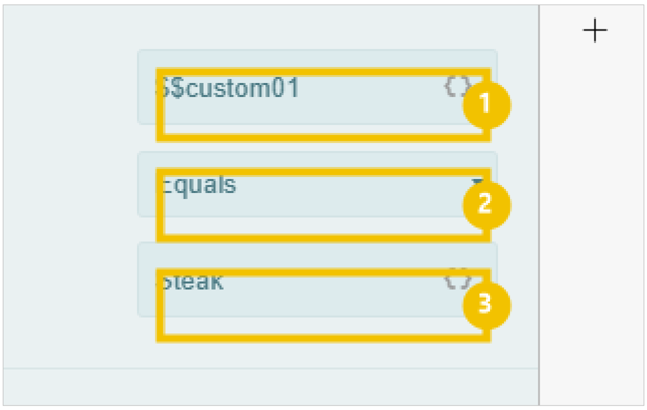


1. **Edit HTML**: Click HTML to launch the Custom HTML window.
2. **Enter HTML**: Enter your custom HTML here. NOTE: Not all HTML may be allowed by emfluence. When finished, click Save & Close.

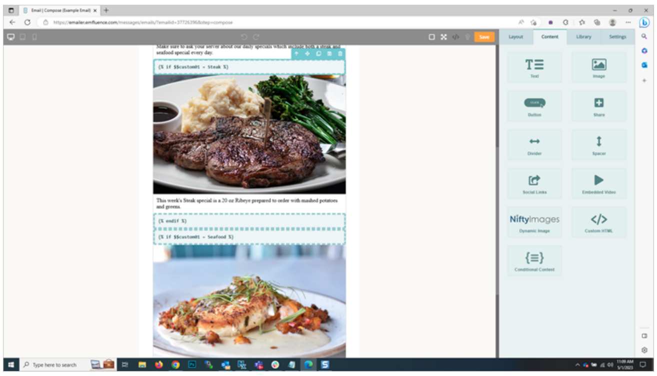
10.1.12. Conditional Content

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.



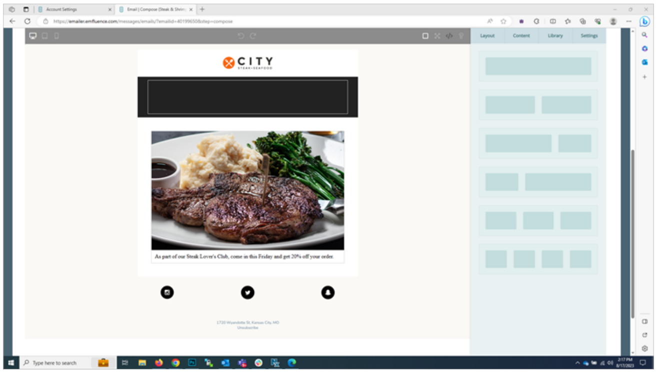
You can drag any elements between the If and End If statements. You can use multiple If and End If statements, or instead use an If and a Then for all those who don't match a single If statement.



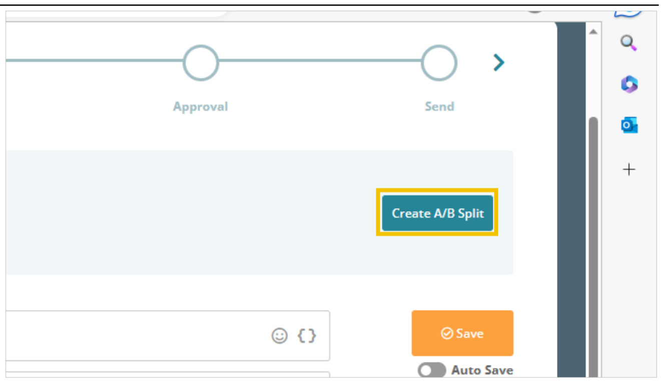
11. Segmentation, Variables & Conditional Content

11.1. A-B Testing

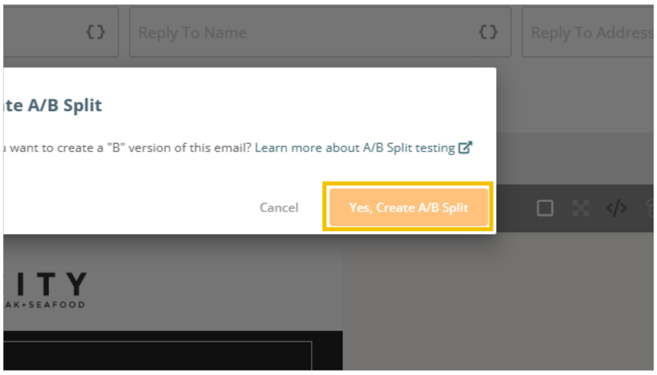
You can use A/B Split to test different messaging to your contacts. Built into manual email sends, you can create multiple copies of an email. Certain segments of the groups chosen will recieve one of your emails with the remainder getting the email deemed to have performed best in your testing.



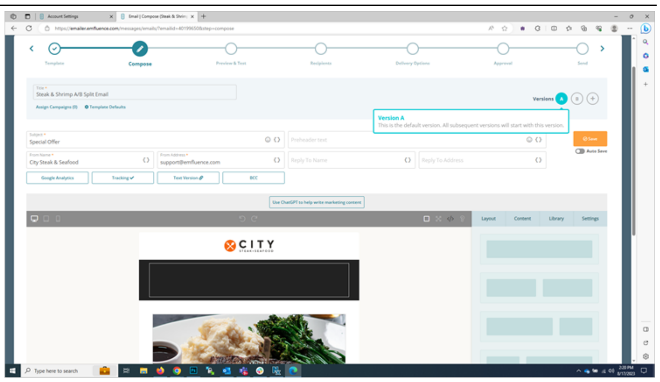
We suggest first making one version of your email, then clicking **Create A/B Split**.



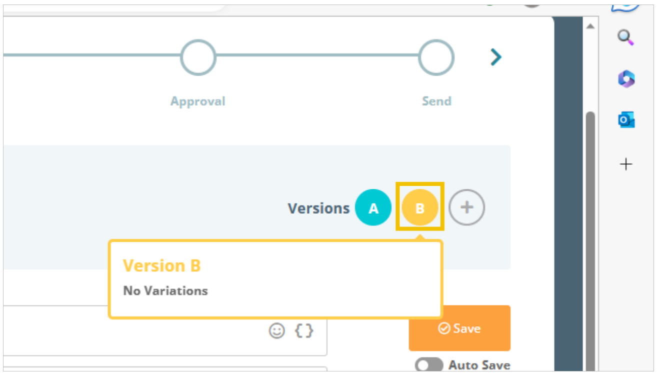
Confirm by clicking on the button **Yes, Create A/B Split**. You can create up to 5 different versions of your email following these same steps.



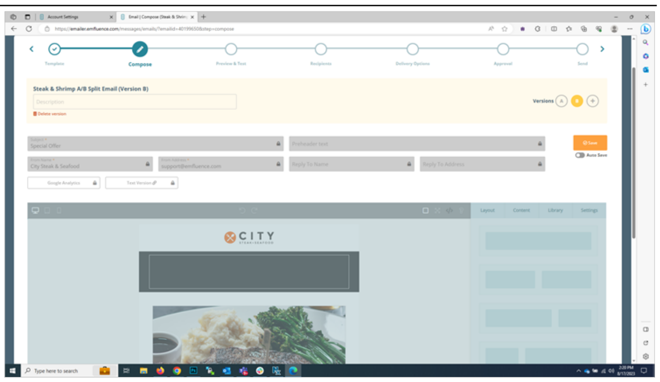
Your original email will now become your A version. You can toggle between versions, to edit them individually by clicking on the letters of each version. To create a third version, click the plus sign and confirm.



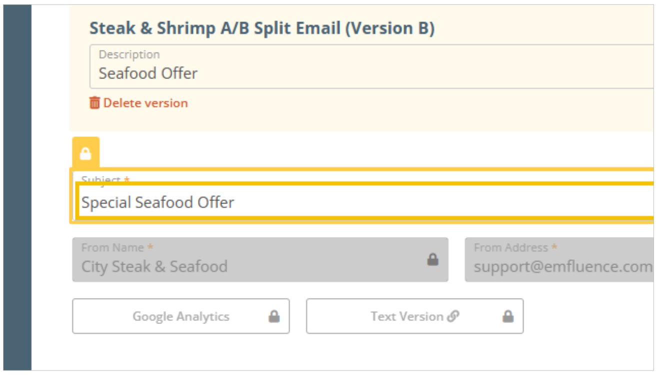
To edit your B version, click on **B**.



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.

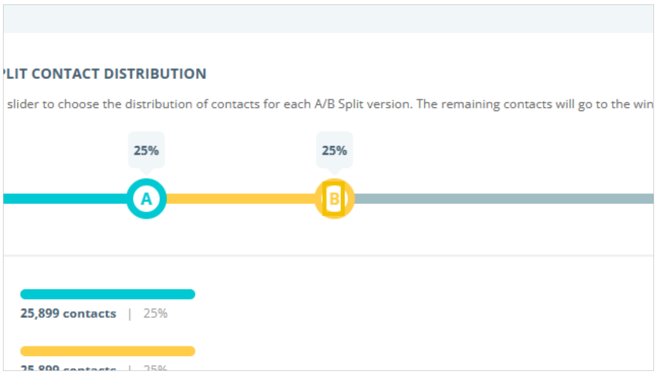


Now unlocked, you can edit the content just as you would any email.

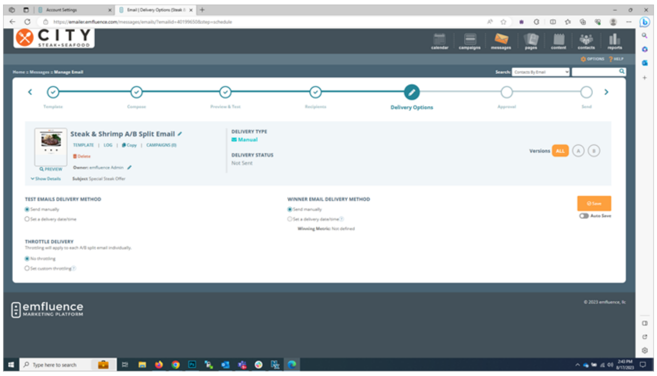


You can preview all versions of the email on the **Preview** step. Advancing to the **Recipients** step, you will choose your group and then set the size of the segments.

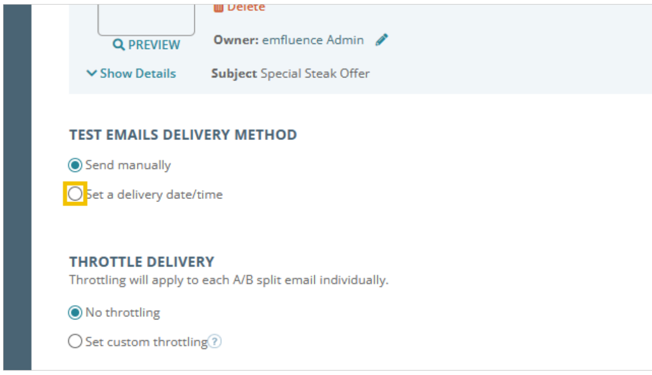
Contacts will be dispersed randomly into the different segments with a section being held out for "winning segment." You can edit the size of each segment using the sliders provided.



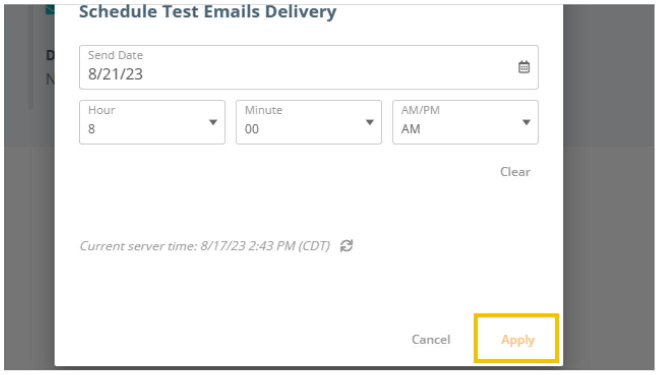
On the Delivery Options step, you can choose to send now or schedule your send. If you schedule your send, you will also unlock the ability to schedule your winning email. If you choose not to schedule your winning email, you can still manually send it on your own.



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

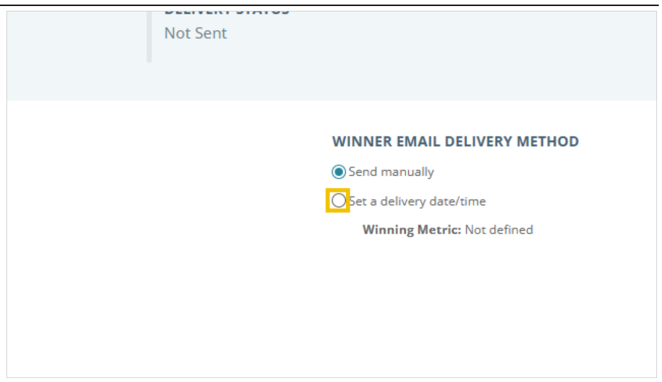


Choose a date and time in the future, and then click on **Apply**.



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.

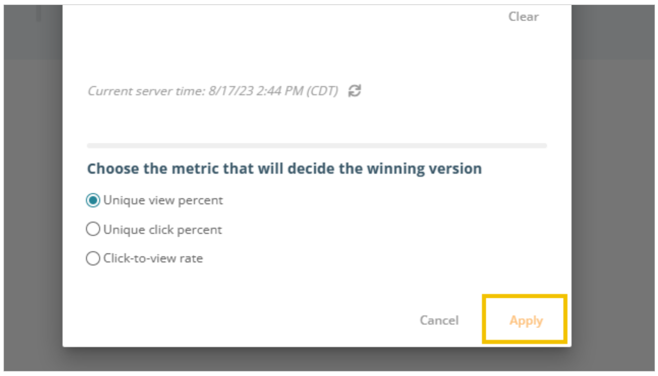


Select your date/time for delivery which will need to be after the time scheduled for your initial segments.

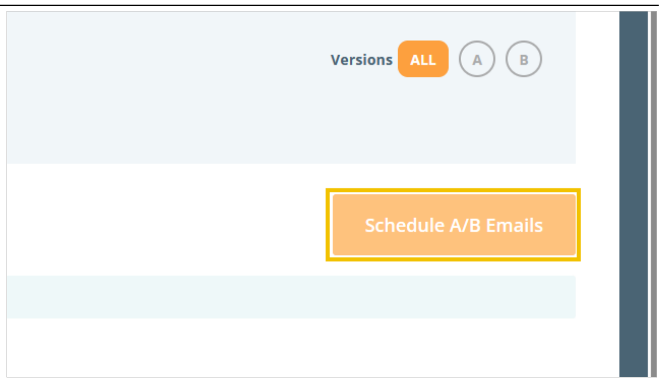
Next, choose your winning metric which can be either the highest view/open rate, the highest click rate, or the highest click-to-view rate.

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

Finally, click on **Apply**.

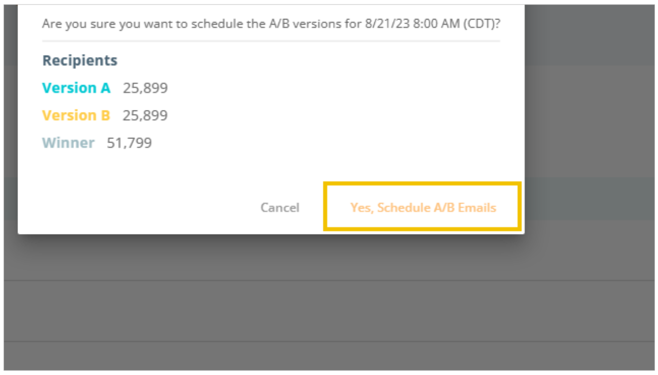


Proceed to the **Send** step and click to **Schedule A/B Emails**.



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

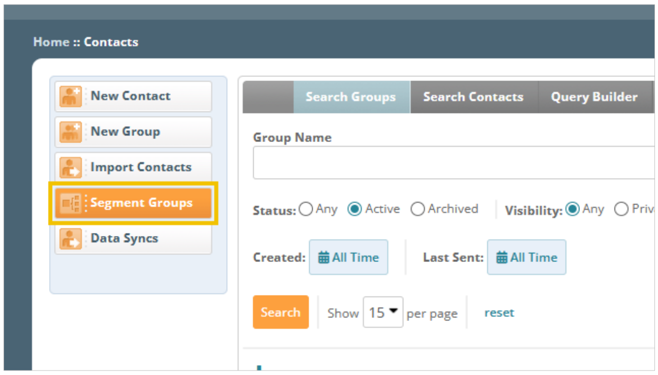
Your email is now scheduled. If you chose not to choose a winning metric and schedule the winner email, don't forget to return and manually choose your winner to complete the send.



11.2.Segment Groups

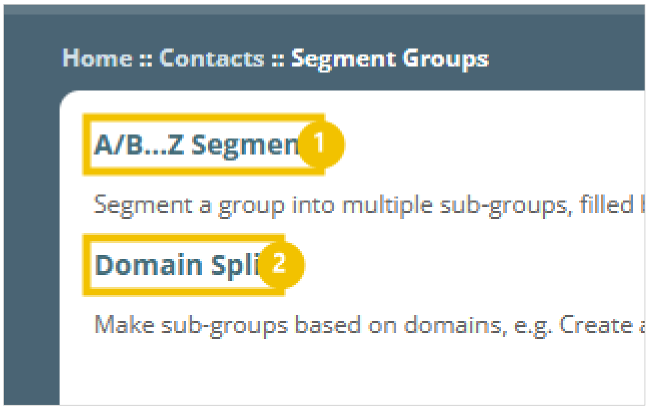
Before proceeding, you might want to check out emfluence's A/B Testing (available to randomly split your list within the email) and decide if it fits your segmentation needs.

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**.

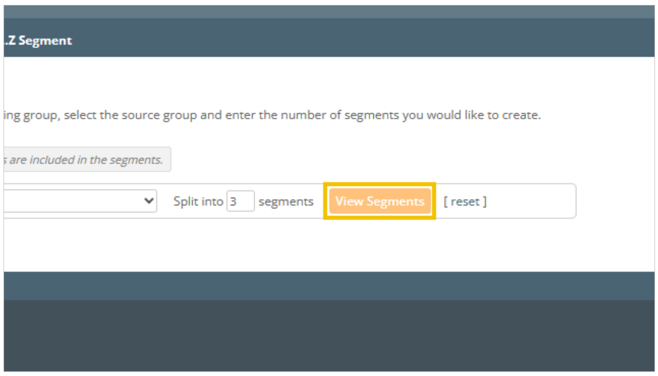


For your segmentation, you can either choose a random A/B split or choose a Domain split.

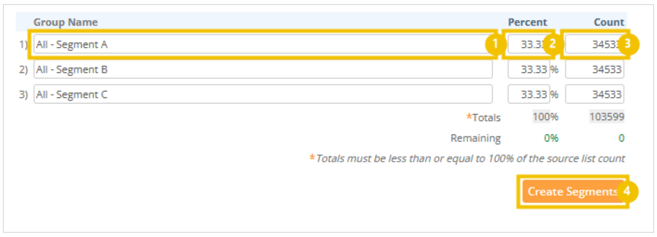
1. **A/B...Z Segment**: Randomly split an existing starting group into separate segments.
2. **Domain Split**: Make segments based on domains.



To create an A/B Split, choose your starting group from the dropdwn 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.**

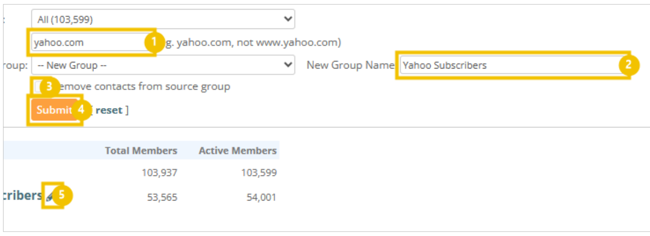


On the next page, you can make changes by editing the group names and counts before saving and creating the groups.



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.

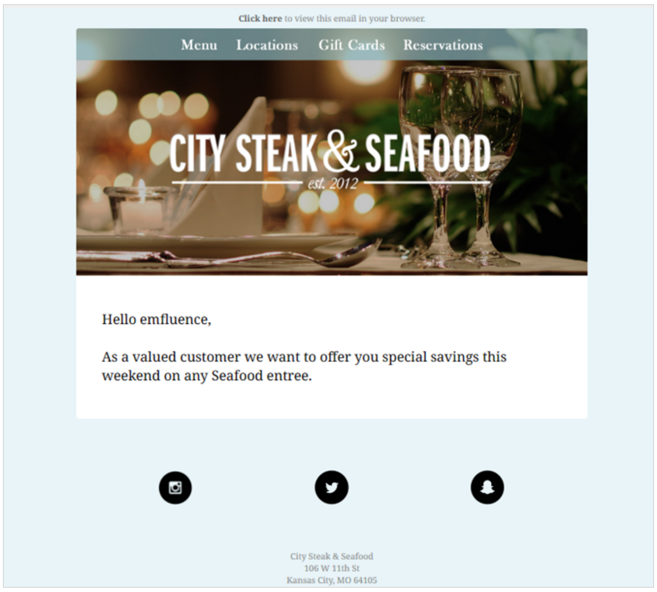
As with A/B Split, in Domain Split you will start by choosing the source group and then make choices on what to do with your results.



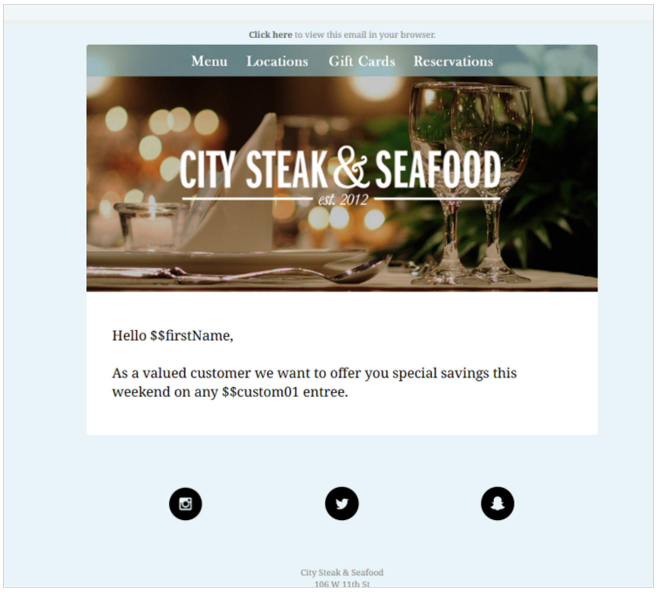
1. **Domain**: Choose the domain you wish to create a segment for.
2. **Group**: Either choose a pre-existing group from the Destination Group dropdown or type the name of the new group you wish to create.
3. **Remove contacts from source group**: Optionally, you can remove these contacts from your starting 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.

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.

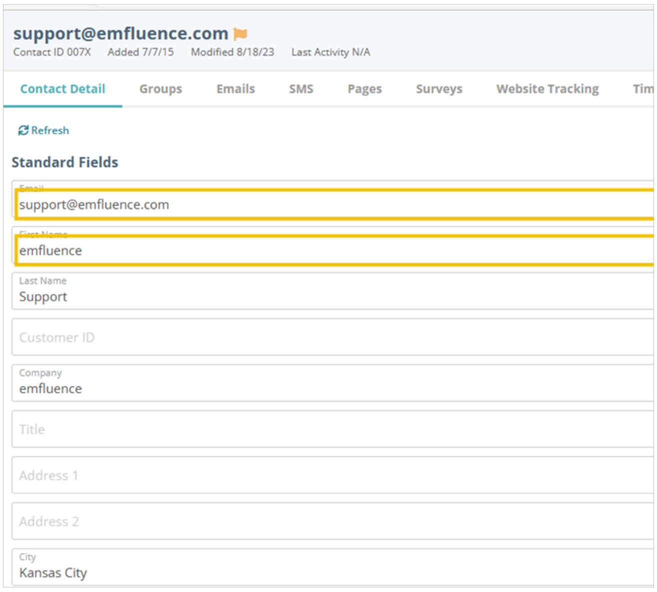


By inserting the variable placeholder in your email, whatever value is saved in that field on an individual's contact record is what will be filled in when they recieve the email

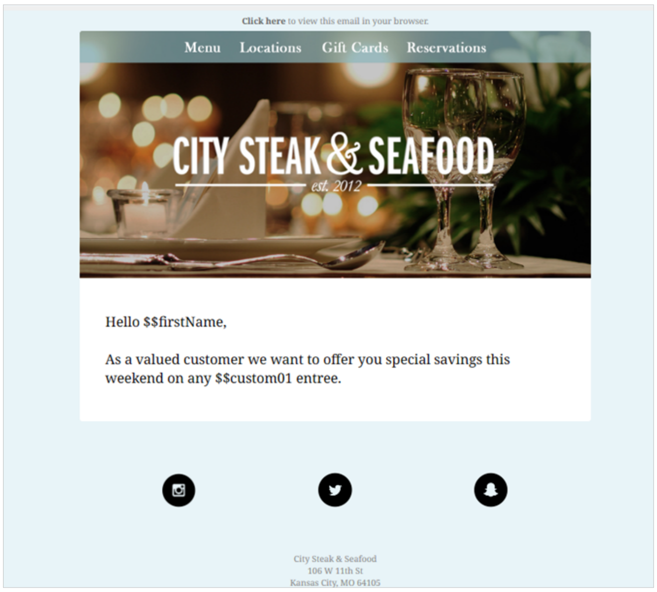


On an import, manual save, API call, or data sync, data is saved on the contact record.

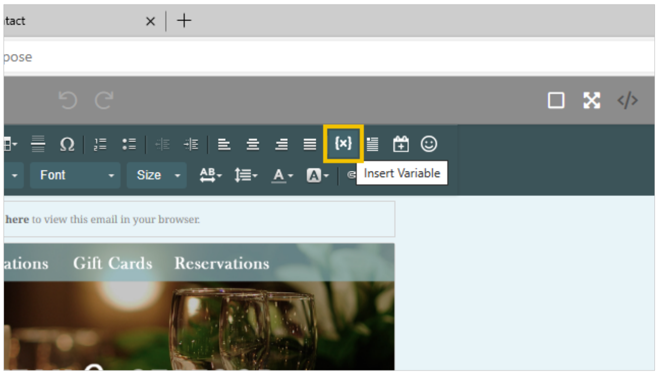
1. **Email**: The saved email address for this contact.
2. **First Name**: The saved first name value for this contact.



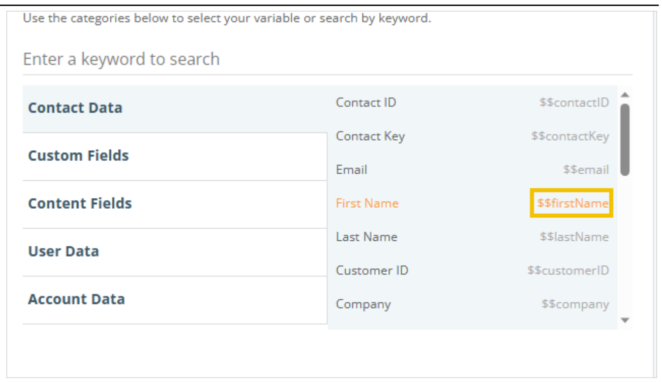
When using variables, you will insert the variable to the corresponding data point. Whatever is saved in that field is what will be inserted into the email.



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.

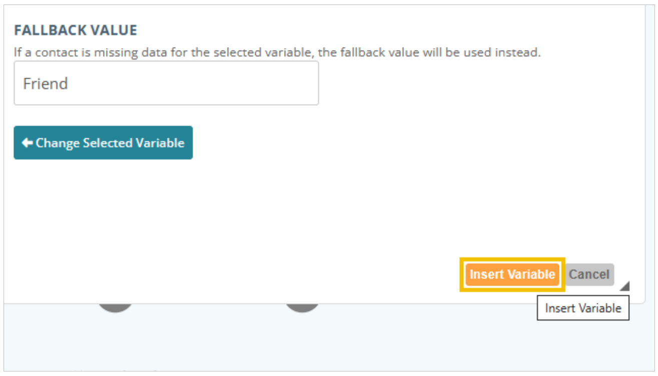


Find and choose the variable you want from the pop-up menu. In this example, we want to insert the contact's First Name. This is a standard field that can be found under Contact Data. Find and click **$$firstName**.

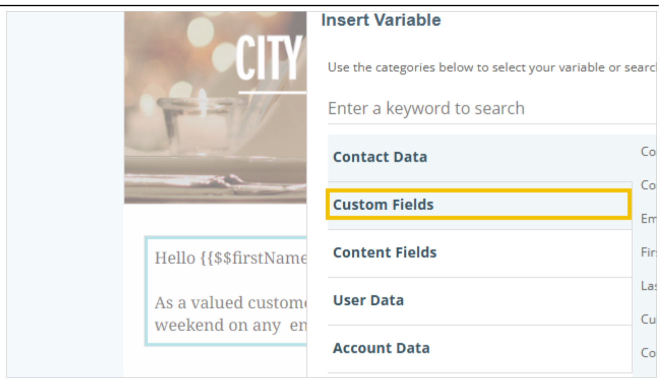


You will be prompted to choose a **Fallback Value**. If no value is saved in that field on a contact's record, in this example First Name is blank, the platform will use the **Fallback Value**. You are not required to use a Fallback Value. However, if you do not use a fallback, a blank entry will insert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

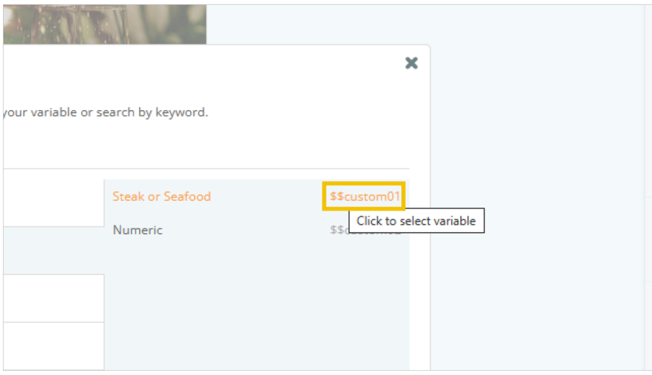
Type in your Fallback Value. Then, click **Insert Variable**.



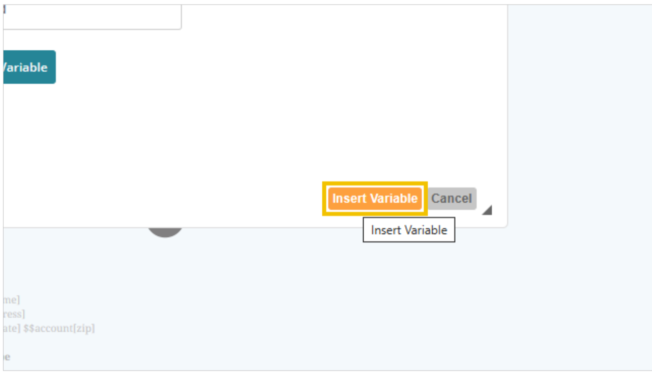
Custom Fields are located in the Options menu. These are non-standard data points created by members of your account to save specific data on the contact record. To use one as a variable, click on the menu for **Custom Fields** after clicking the Variable icon.



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**.

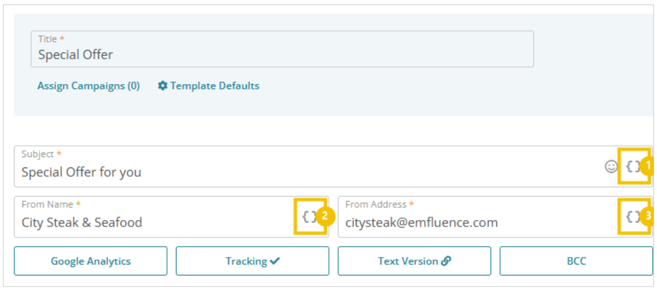


Type in your fallback value and click on **Insert Variable**.

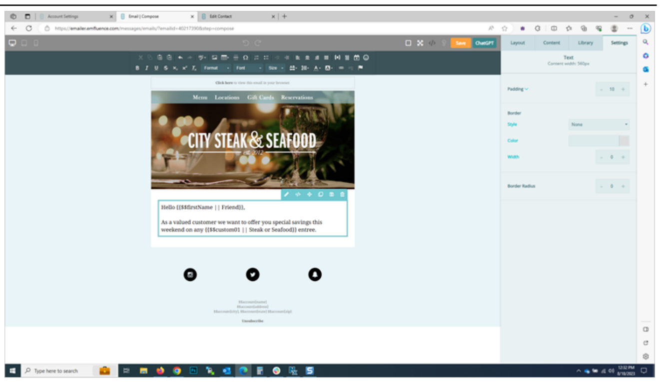


Variables can also be inserted into the Subject Line, the From Name and From Address of your email, and also the Reply To Name and Reply To Address of your email. Be careful of using variables for email addresses and make sure all recipients have a valid value on their records.

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.



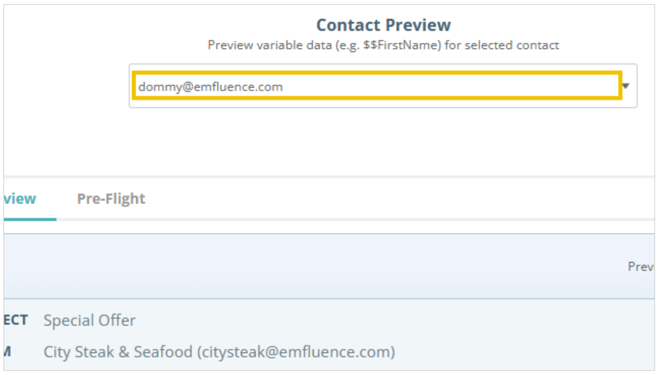
You will now see the variables inserted into your email. After saving, you can advance to the Preview step and check your contacts to confirm the values are correct.



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.

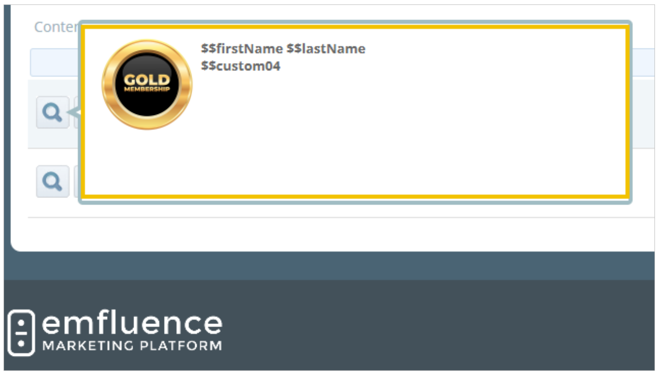
Always test when using variable content.



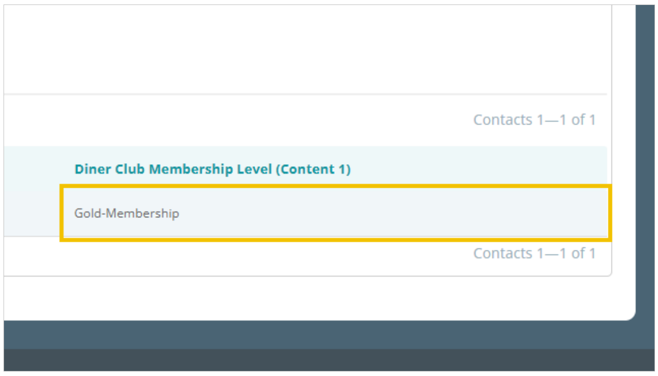
11.4.Variables & Conditional Content

11.4.1. Content Variables

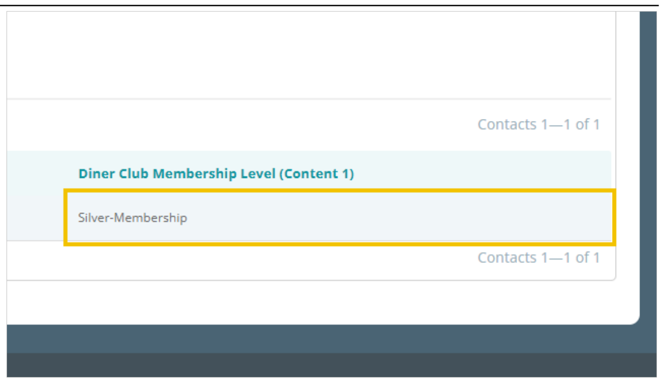
Content Variables work by creating **Content Blocks** and assigning a specific block to each contact on their contact record. When using a content variable, whatever block is assigned to that contact will be inserted into the content.



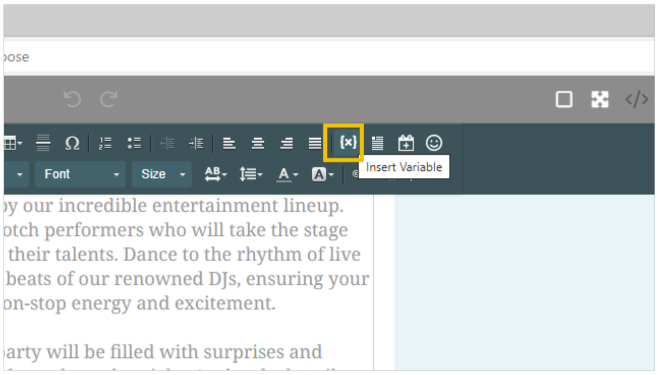
I this example, anyone who has been assigned the **Gold-Membership** block in their **Content 1** value will have that block inserted into their email.



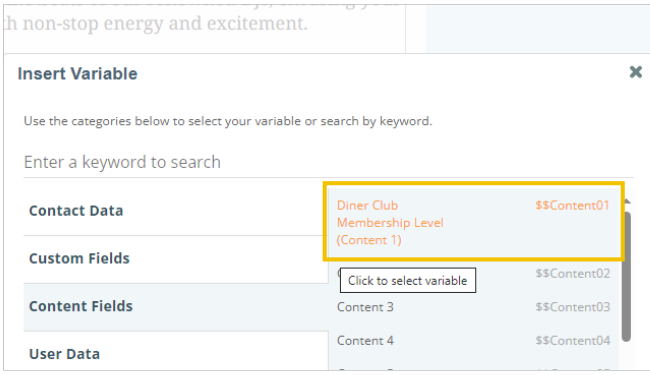
And anyone assigned with the **Silver-Membership** block will receive that block of content.



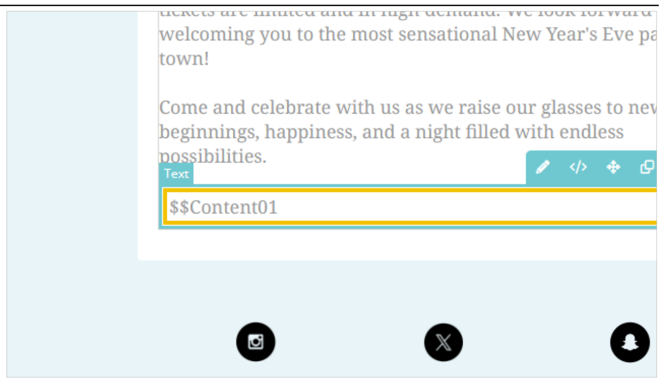
In your email, you can insert Content Variables the same way you insert other variables through the use of the **Insert Variable** picker.



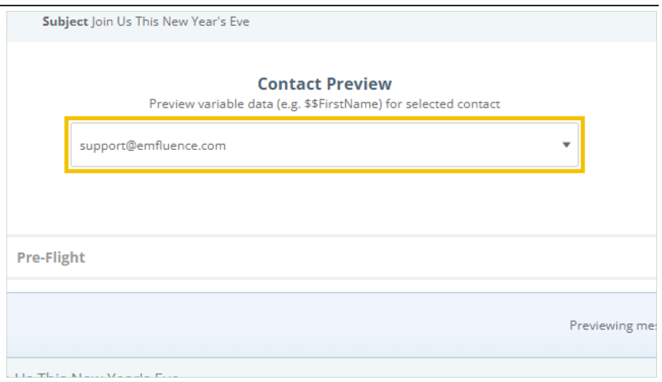
In the Content Fields menu, choose the Content Variable you wish to use and Insert.



The Content 1 variable will be inserted into your content.

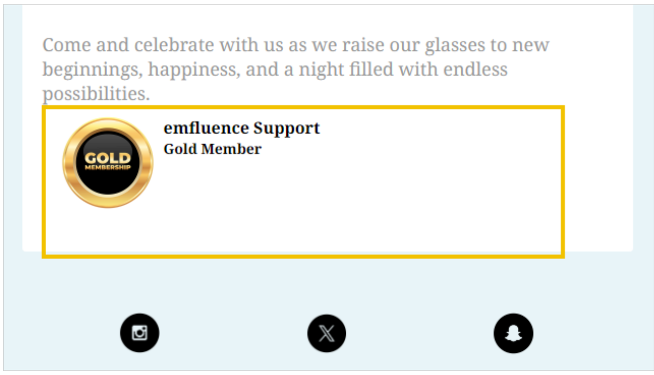


On the Preview step, we can preview as any contact. Choosing a contact with the Gold Member block assigned we can see what their content will look like.



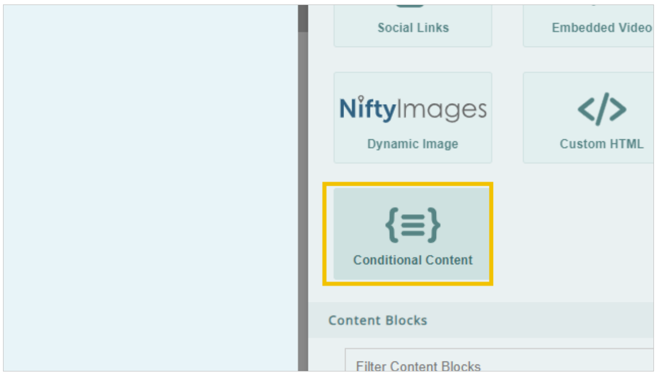
You will now see that block of content applied.

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.

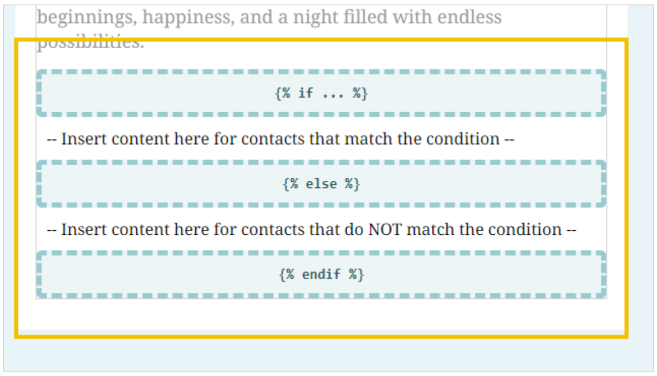


11.4.2. Conditional Content

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.

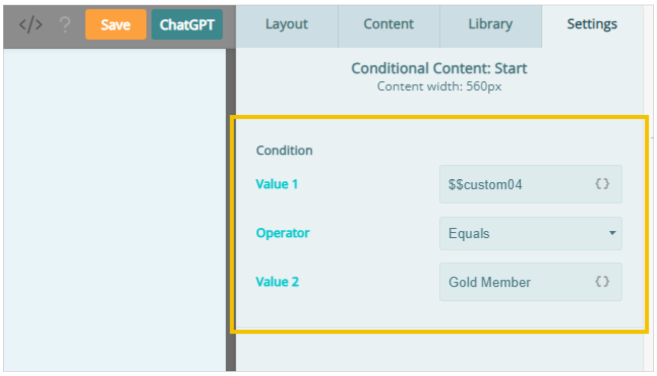


Conditional content will insert a multi-step block into your text. The top section will match the query you choose, and anyone matching that query will get whatever content (images, buttons, text, etc.) which you add to that block.



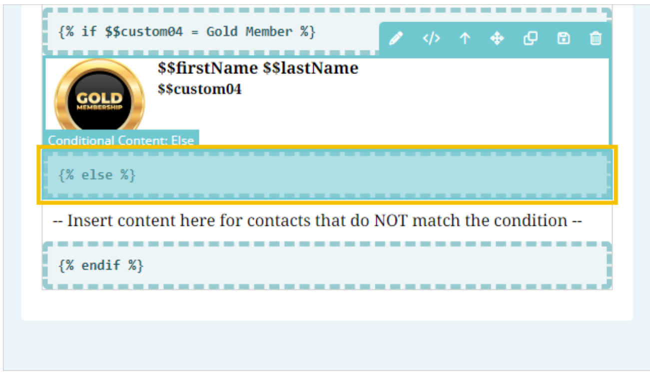
When clicked into the **Conditional Content: Start** line, you will be able to access the miniature query builder in the **Settings** tab. In order for you to make use of conditional content, you must be able to construct a simple query based on data within your account.

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



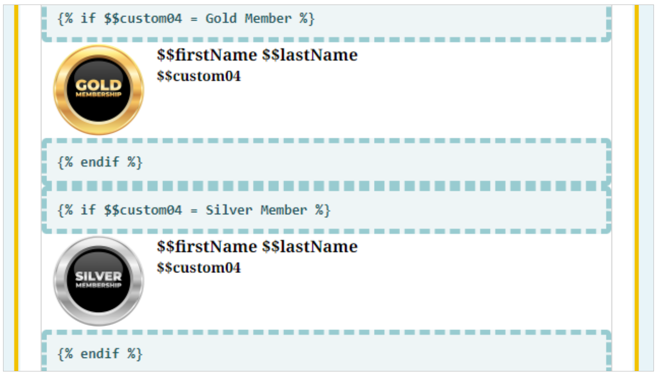
Next, add any content you want inside the query. This can include layouts, images, text, buttons, etc.

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.

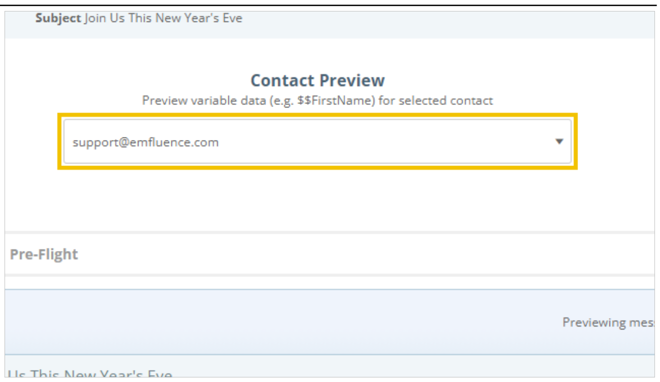


Another option is to string multiple If / Then statements together. Rather than sharing one piece of content to a subset and another piece of content to everyone else, this allows you to create separate queries for different content set up for different contacts.

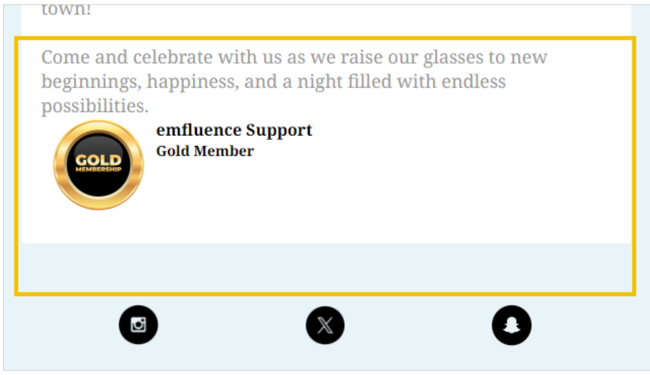
In this example, contacts matching the first query will receive the Gold Member content. Contacts matching the second query will receive the Silver Member content. Contacts not matching either will not receive any additional content.



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



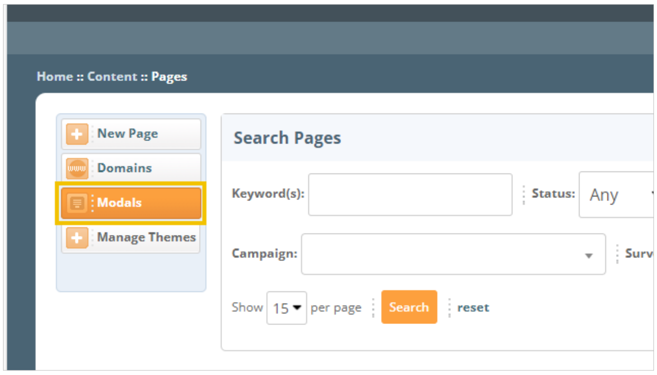
Scrolling down in your preview, you should find contacts that match the Gold Member query receiving the Gold Member content, contacts matching the Silver Member query receiving Silver Member content, and contacts matching neither receiving no additional content.



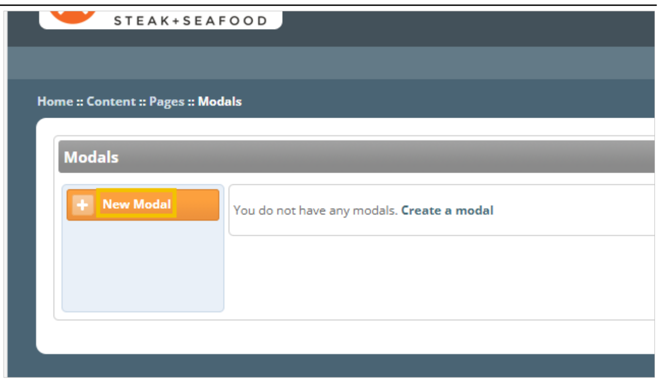
12. Modals

12.1. Modals

Modals can be found in the Pages menu.

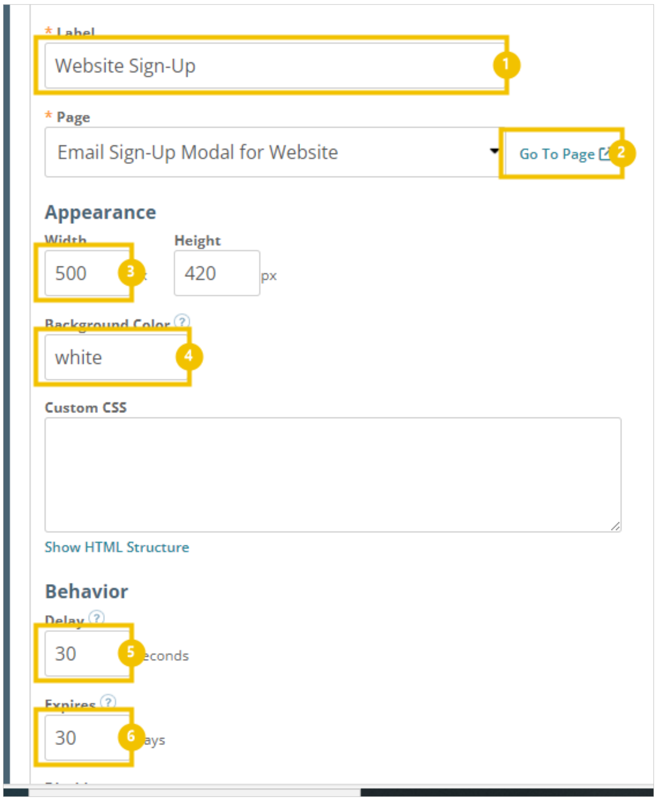


To create a new modal, click on **New Modal**.



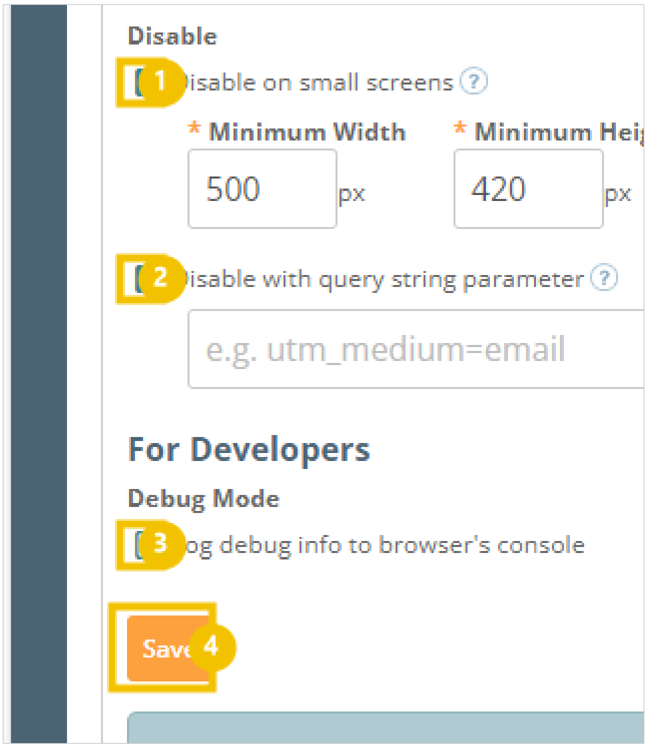
Fill in the necessary details of your modal. emfluence Modals are delay based. If you want a trigger-based modal you can add a landing page's embed code to a third party modal.

1. **Label**: Fill in a friendly name to explain the use of your modal
2. **Page**: From the menu, select the emfluence landing page you want to embed within your modal. The Go To Page option will open that page in another tab to confirm it is the page you want.
3. **Width**: Adjust the width and height for the modal.
4. **Background Color**: You can choose to add a background color to your modal as well as adding custom CSS which will apply outside the embedded page.
5. **Delay**: emfluence Modals are delay-based. Choose how many seconds before the modal will pop up.
6. **Expires**: After someone views the modal, choose how many days before it appears to them again (on the same browser).



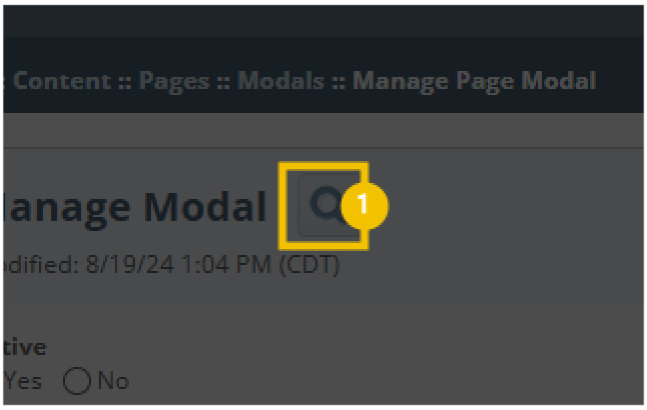
---

1. **Disable on small screens**: You may choose to disable modals on small screens by enforcing a minimum width and height.
2. **Disable with query string parameter**: If you don't want your modal to launch in links containing certain parameters you can include them here.
3. **Log debug info to browser's console**: This can be enabled by developers for debugging purposes. It is unlikely you will use this feature.
4. **Save**: Once you have filled in all information, click Save.

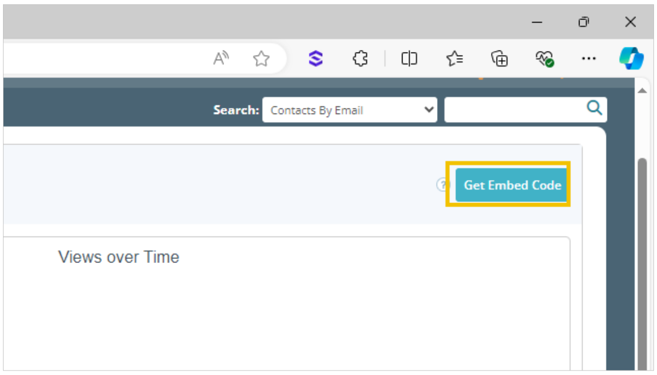


Once saved, the preview button at the top of the screen will launch what the modal will look like based on your specifications.

1. **Preview**: Click to preview your modal. Your modal MUST be saved before the preview mode will function.

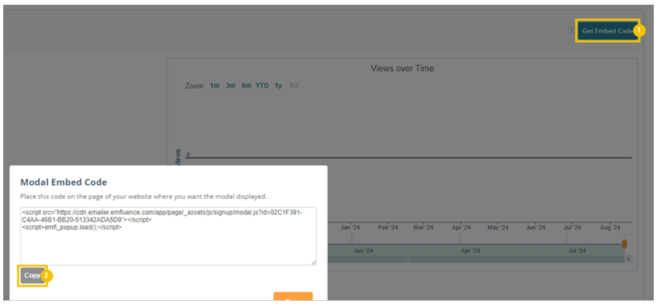


Click on the button **Get Embed Code**



Grab your code to embed it on your website. After embedding, you can make changes to your settings without having to edit this code.

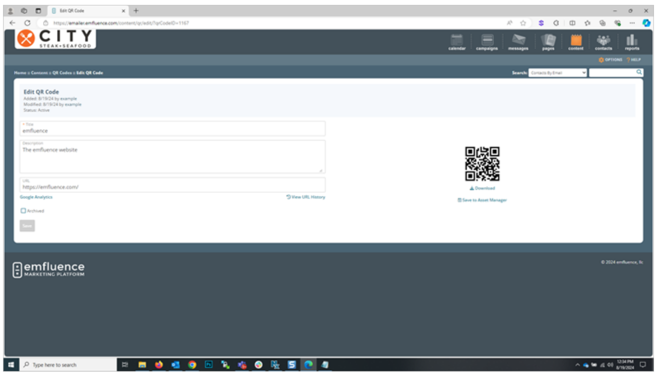
1. **Get Embed Code**: Click to find your embed code
2. **Copy**: Copy the code. This is what will be put on your website. If sharing with someone else who will be implementing the code, put it in a text-only file (such as Notepad) and not Word.



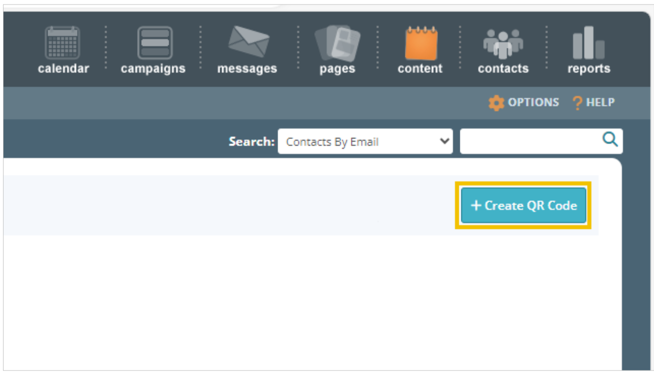
13. QR Codes

13.1. QR Codes

Located in the Content section, you can create QR Codes which can be downloaded or added to your Uploaded Files menu.

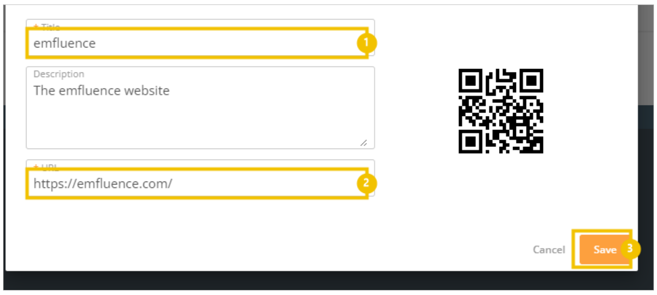


To create a new QR Code, click on the button **Create QR Code**.



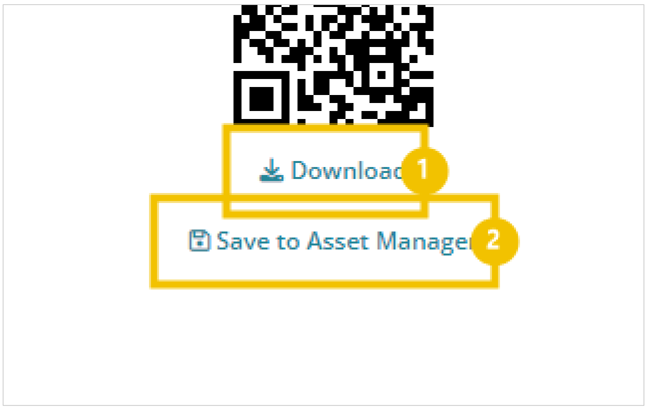
Fill in the information necessary to create your code.

1. **Title**: Create an internal title to easily identify the source of the QR Code. You may also choose to add a description to provide further information
2. **URL**: Type or paste the URL where you want the code to direct contacts.
3. **Save**: Save your code.



Your information will be saved. You can make changes to this page at any time. Reminder: Changing the URL of a QR Code will create a different code.

1. **Download**: Choose to download your QR Code
2. **Save to Asset Manager**: Choose to save the QR Code to your Uploaded Files.



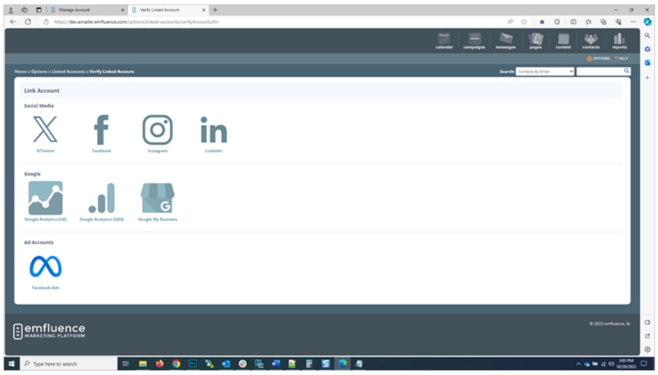
All QR Codes created in your account will be shown in the menu. You can choose to Archive (hide from the active menu) or Delete (remove completely) your QR Code.

1. **Title**: Click on the title of a QR Code to see and/or change its details.
2. **Delete**: Click on the trashcan icon to delete the code. If you previously saved the image to your Uploaded Files, this will not delete that image.

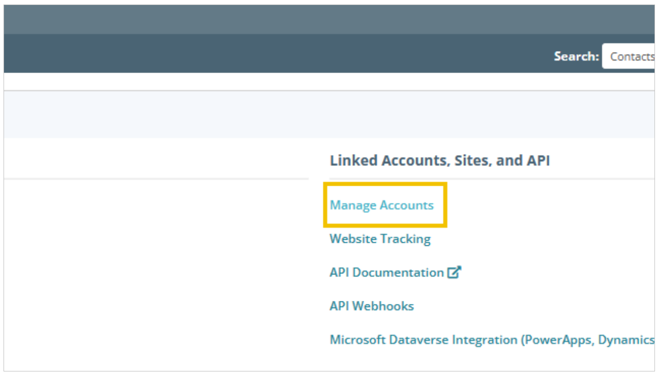
14. Social

14.1.Manage Linked Accounts

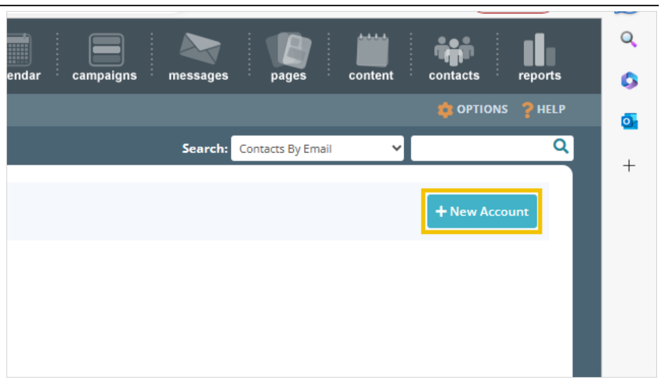
In the Options menu, you can link accounts such as Twitter Profiles, Facebook Pages, LinkedIn Pages, Instagram Business Accounts, Google Analytics, GA4, Facebook Ads, and Google Reviews.



In the **Options** menu, under Linked Accounts, click on the link **Manage Accounts**

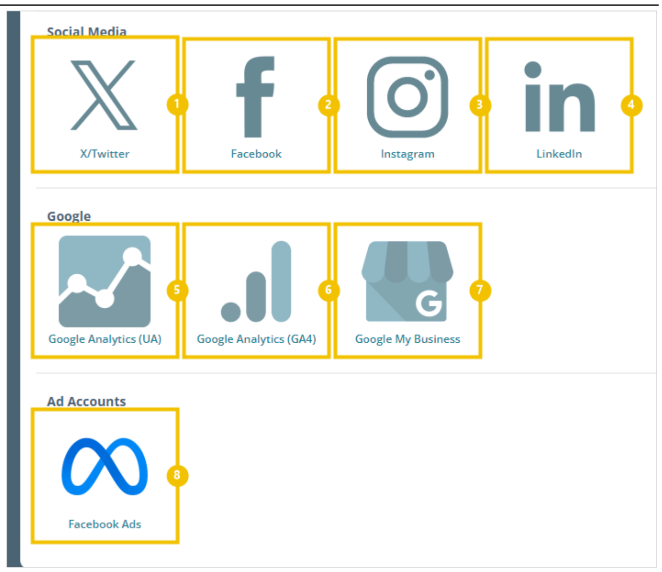


Here you can see and edit any currently connected accounts. To add a new account, click on **New Account**



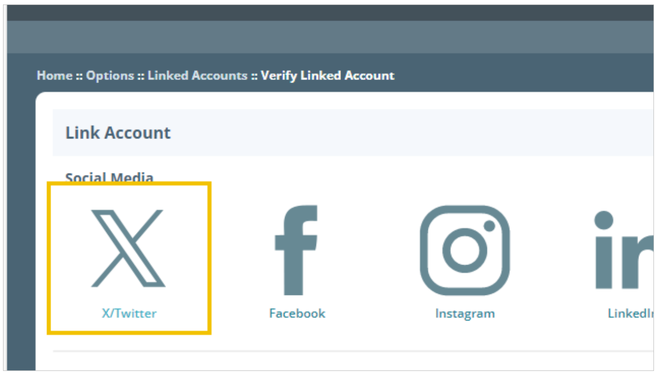
Choose the account you wish to connect. You will need to be logged into that account in order to approve the necessary permissions.

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.

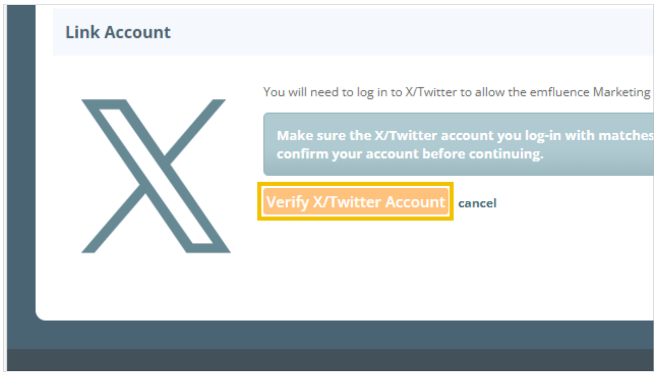


5. **Google Analytics (UA)**: Click to connect the older Google Analytics - UA.
6. **Google Analytics (GA4)**: Click to connect the newer Google Analytics - GA4.
7. **Google My Business**: Click to connect Google Reviews through Google My Business.
8. **Facebook Ads**: Click to connect Facebook Ads to push emfluence contacts to Facebook as audiences.

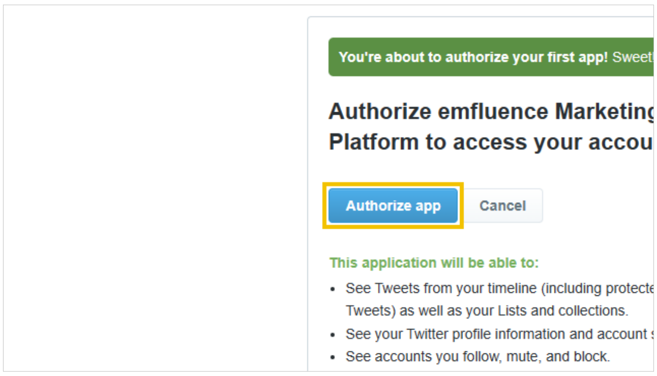
To connect a X (Twitter) account, click on the button **X/Twitter**.



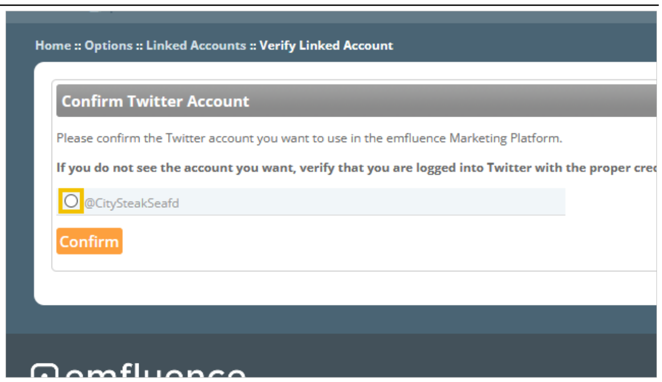
Click on **Verify X/Twitter Account**.



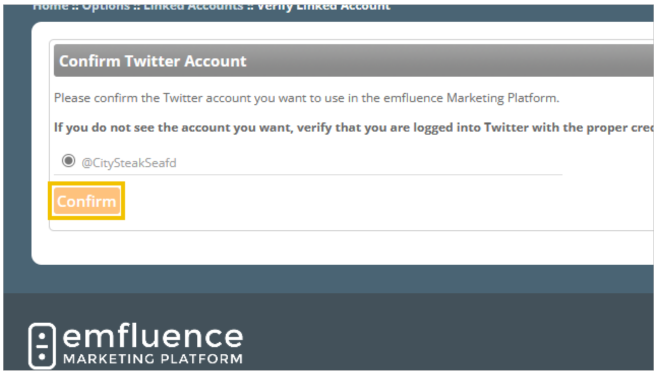
You will need to be logged in to authorize emfluence to connect to your account. If you aren't logged in, you will be prompted to do so. Once logged in, click on the button **Authorize app**



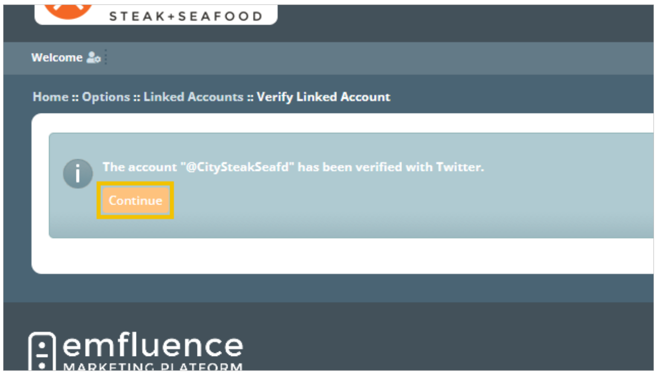
You will be redirected back to emfluence to find all the pages/accounts the user you authenticated has access to. For Twitter, only a single choice will show. For Facebook or LinkedIn, all pages in those accounts will show, and you will click on a single page to finalize your authentication by clicking on the radio button next to your selection.



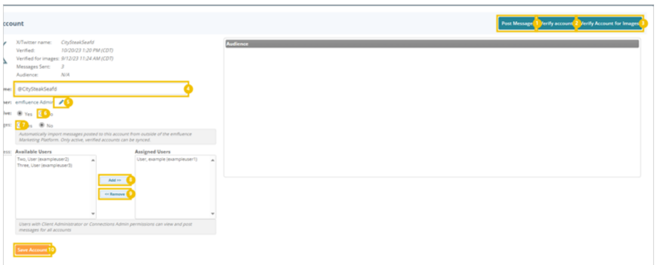
Click on the button **Confirm**



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 messges 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

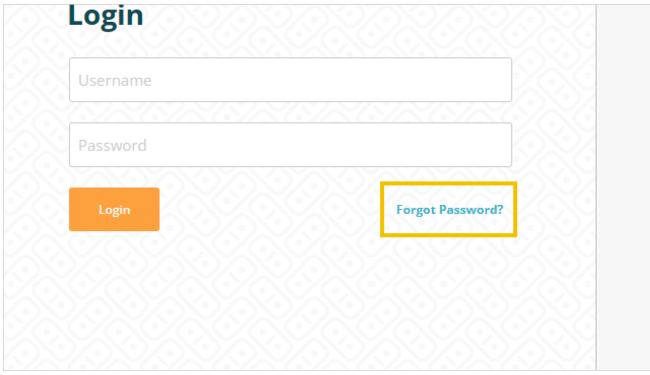
the Add button.

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.

15. Tips & Tricks

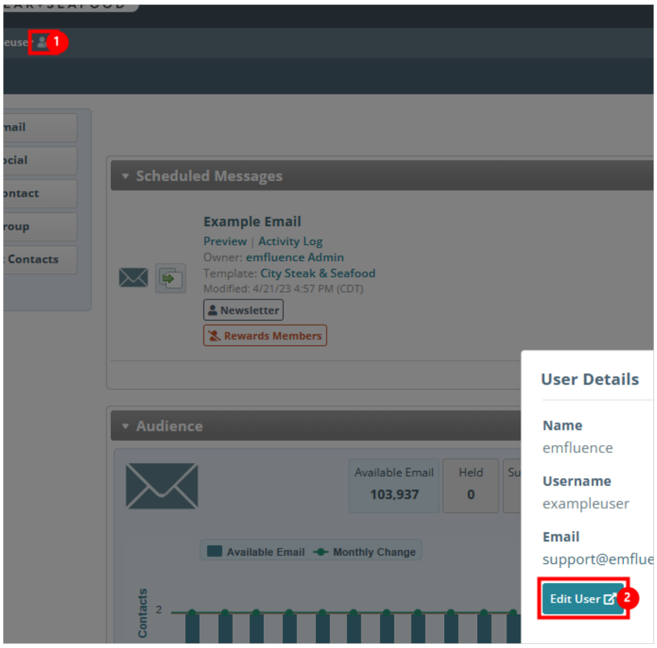
15.1. Reset Your Password

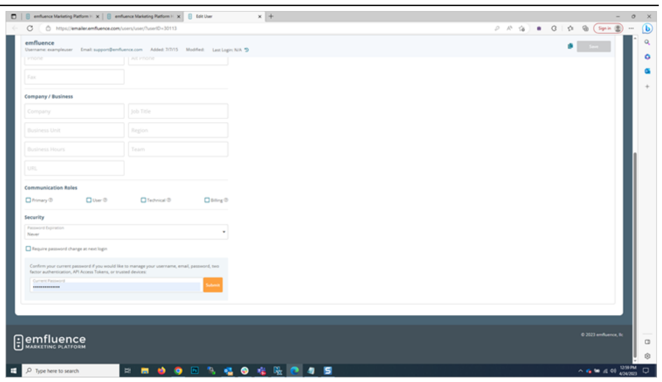
If you can't remember your password you can use the **Forgot Password?** link on the sign-in page. This will trigger an email to be sent to you where you can choose a new password. The password must be at least 12 characters in length, have at least 1 character which is not a letter, and not be a previously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



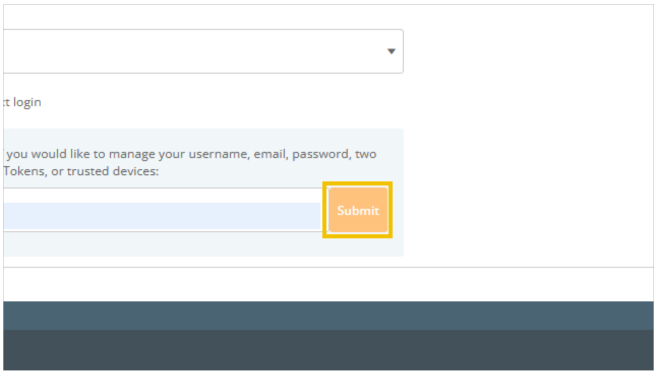
If you know your password, but need to change it, you can do this after logging into the platform by clicking the icon next to your username at the top of the page. In the pop-up, click the Edit User button.

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



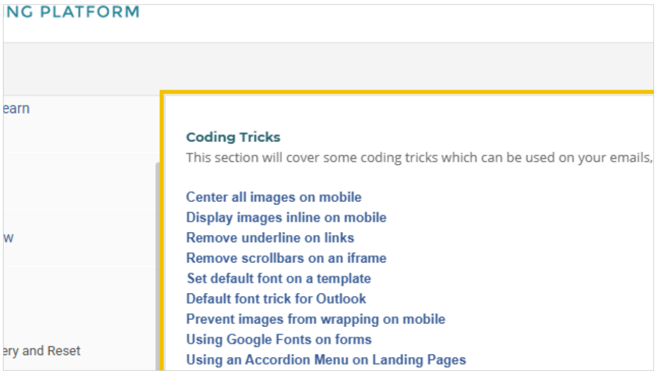


Scroll down the the Security section and type in your password. Hit Submit to unlock the section which will allow you to change your password and email address, create API tokens, and set up multi-factor authentication.



15.2.Email Coding Tips

The section provides coding tricks related to emails and email templates. The coding examples referred to in the section can be found in the emfluence Help Section: https://help.emailer.emfluence.com/coding-tricks



15.2.1. Create a Foreign Language Version of your Email

Using the View as Webpage Link in combination with code from Google Translate's web conversion tool (which you will need to get the proper variables for the language you wish to use), you can add a link to display your email in the browser in that foreign language.

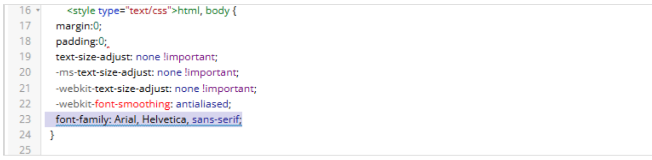
Use the link **https://emailer-emfluence-com.translate.goog/viewaswebpage/$$message[messageID]** followed by the specific code for the language Google provides.

Link to it in your template or email content just as you would any other link. For example, for Spanish your link would be **https://emailer-emfluence-com.translate.goog/viewaswebpage/$$message[messageID]?_x_tr_sl=en&_x_tr_tl=es&_x_tr_hl=en&_x_tr_pto=wapp**

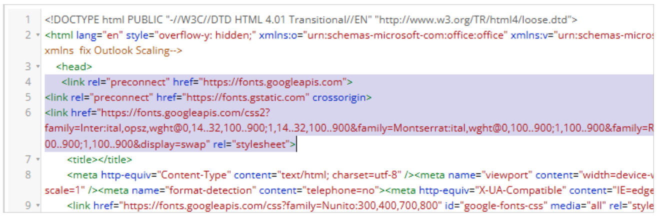
15.2.2. Text

15.2.2.1. Set a default font on your template

By adding a specific font family in the CSS of you template, you can set all text to use the font of your choice. When making a new email, new text sections added will also display in this font. NOTE: If you hard code a different font for any section that will overwrite this template default.

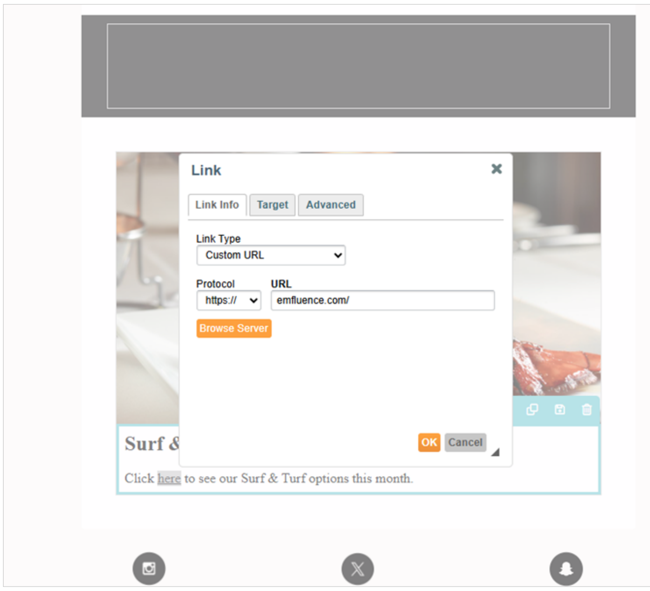


To use a Google Font, you will still add the font family as with any standard font. You will also need to add the embed code for that font (found on the Google Font website) inside the head section of your template. NOTE: Not all inboxes support Google Fonts. If a font isn't supported the text will fallback to the font family or the inbox default.



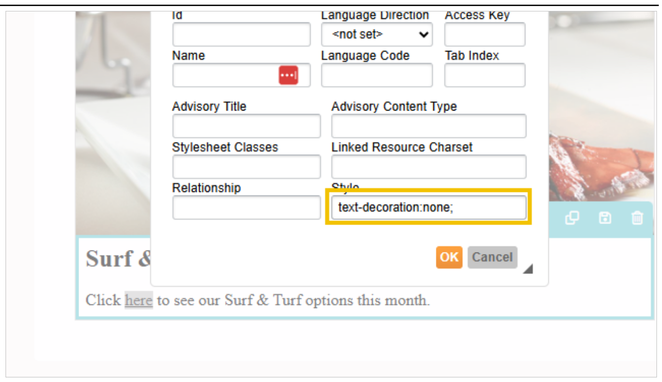
15.2.2.2. Remove underline from a link

When adding a link in a text element you can put in a piece of styling to remove the underline from the linked URL. After pasting or typing in the link, click on the Advanced tab.



Under **Style** add the code **text-decoration:none;** which will remove the underline from your linked text. You can also choose to change the link's color by adding a color values as well. For example, adding **color: #FFFF00; text-decoration: none;** would make your word yellow and also remove the underline.

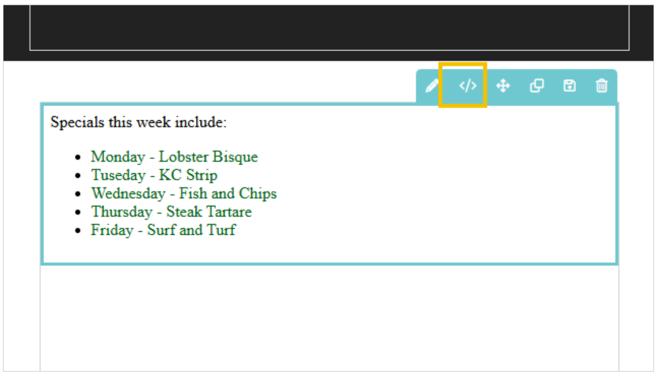
NOTE: This styling can also be used in template builder to remove underlines from other default links in your template.



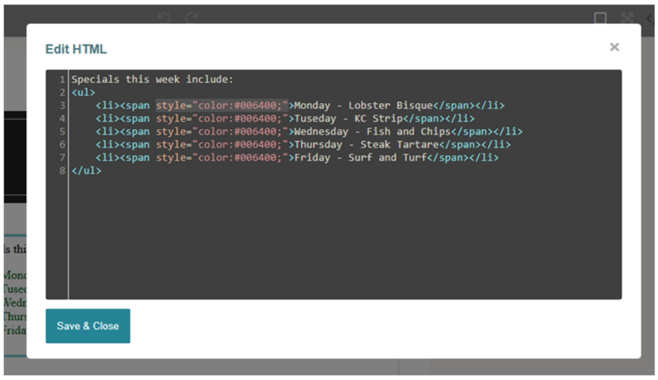
15.2.3. Change the color of a numbered or bulleted list

When editing the color of a bulleted or number list, you will note that the colors of the bullets or numbers do not change automatically and keep the default font. You can overwrite this with a simple line of code.

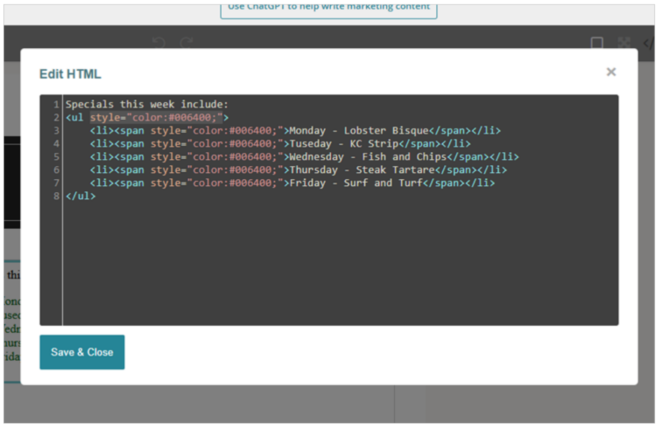
To edit, click on the **Edit HTML** button of the text element.



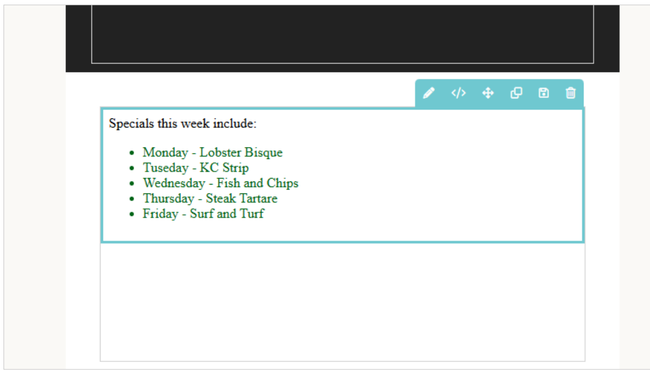
In the code view, you should see the color of the text within your list being applied to each individual line. Copy that code.



Apply that same code to the outer tag of the code and save.



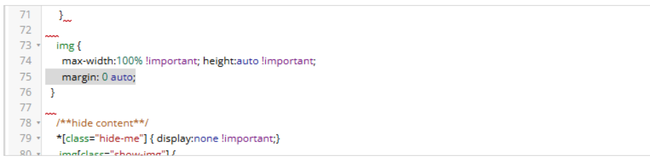
After saving, you should see the color now applied to the bullets or numbers.



15.2.4. Images

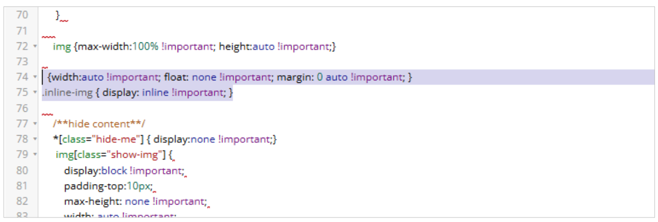
15.2.4.1. Center all images on mobile

To center all images in mobile on a template, in template builder, add margin: 0 auto; under the media query.



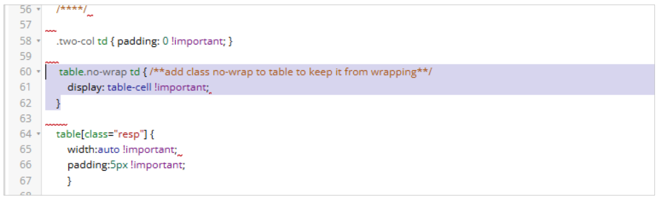
15.2.4.2. Display images inline on mobile

To display all images inline on mobile, add the following code to the head section of your template in template builder: {width:auto !important; float: none !important; margin: 0 auto !important; }



15.2.4.3. Prevent Images inside a table from wrapping

If your template includes the no-wrap styling in the head section CSS, this styling can be applied to any table in the template to prevent that table from wrapping on mobile. NOTE: In order to work content must be in separate fields of the table.



```
/****/

.two-col td { padding: 0 !important; }

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

table[class="resp"] {
   width:auto !important;
   padding:5px !important;
   }
```

Simply apply the no-wrap class to any table in your template to prevent wrapping.

```
<tbody>
  <tr>
    <td align="center" style="padding: 25px;" width="100%">
      <table border="0" cellpadding="5" cellspacing="0" class="no-wrap" width="100%">
        <tbody>
          <tr>
            <td align="center" style="padding: 4;"><a href="https://www.instagram.com/emfluence
black/instagram.png" width="40"/></a></td>
            <td align="center" style="padding: 4;"><a href="https://twitter.com/emfluence"><img a
</a></td>
            <td align="center" style="padding: 4;"><a href="https://www.snapchat.com/"><img alt=
width="40"/></a></td>
          </tr>
```

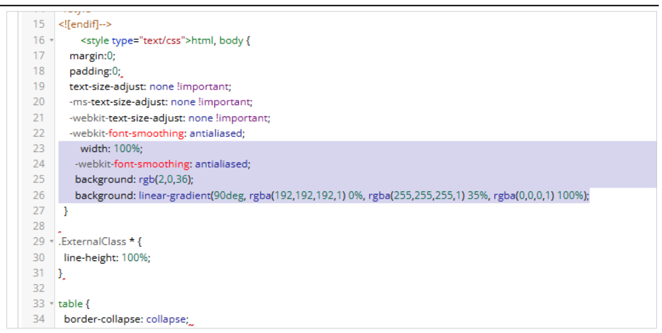
15.2.5. Template Background Color

Email templates are a series of tables within tables. To set a background color on the outside of your template, simply add the color to the outer-most table such as bgcolor="#f16816"

```
  <script charset="UTF-8" type="text/javascript"></script>
</head>
<body cl-connector="1" style="height: auto; min-height: auto; cursor: auto;">
  <table align="center" bgcolor="#F16816" border="0" cellpadding="0" cellspacing="0" width="100%">
    <tbody>
      <tr>
        <td align="center" style="padding: 8px;"></td>
      </tr>
      <tr>
```

By adding some CSS to the body tag of your template you can apply a gradient background color to your email. NOTE #1: If your template has a background color already in place, it will need to be removed. NOTE #2: This applies only to some Apple devices and will not work on most PC and Android devices.

To add the gradient you will add code in the body tag in the template's CSS including a linear gradient using multiple colors to create the gradient.

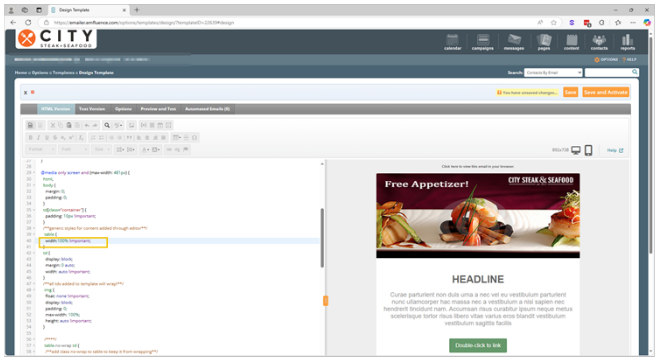


```
<![endif]-->
    <style type="text/css">html, body {
  margin:0;
  padding:0;
  text-size-adjust: none !important;
  -ms-text-size-adjust: none !important;
  -webkit-text-size-adjust: none !important;
  -webkit-font-smoothing: antialiased;
    width: 100%;
   -webkit-font-smoothing: antialiased;
   background: rgb(2,0,36);
   background: linear-gradient(90deg, rgba(192,192,192,1) 0%, rgba(255,255,255,1) 35%, rgba(0,0,0,1) 100%);
 }

.ExternalClass * {
  line-height: 100%;
}

table {
  border-collapse: collapse;
```

15.2.6. Buttons

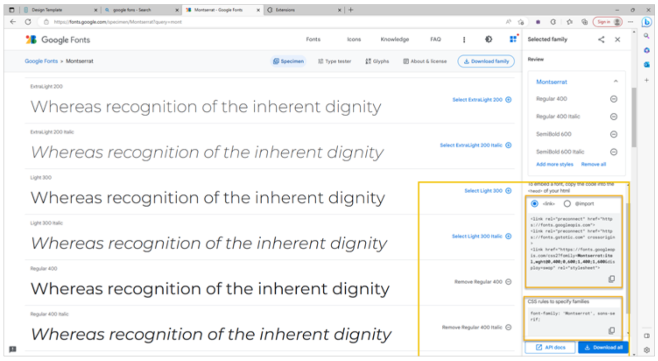
To force buttons to center on mobile, you can add **max-width: 100% !important;** under the mobile media table property of your CSS located in the head section of your template.

NOTE: Make sure you are editing under the responsive media only section. If your template has width: auto !important; already in the template, replace it with this separate code.

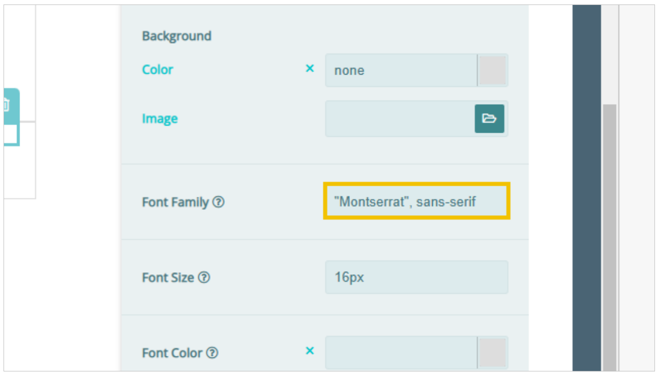


15.3. Set Default Font

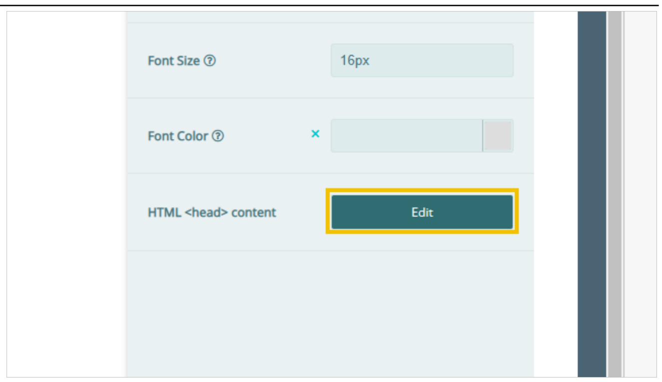
You can add a default font to your email template. You can also add default templates to landing pages made in the Drag & Drop Editor. For a standard font you will simply need the font name and family. For a Google Font you will also need the snippet of code for the font you can find on fonts.google.com.



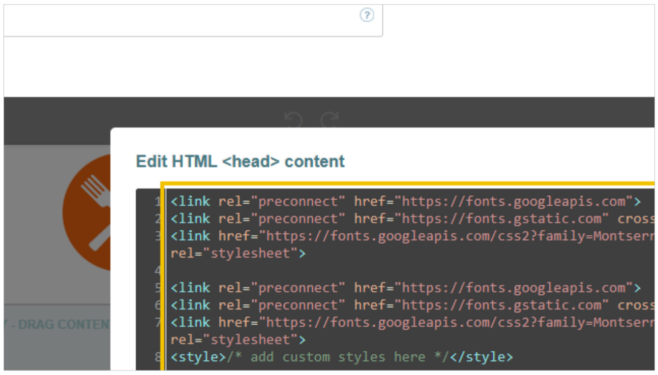
In **Landing Pages**, when creating a page in the drag & drop editor, you can add a default font family under the Page tab in the right-sidebar settings. Paste or type your font family



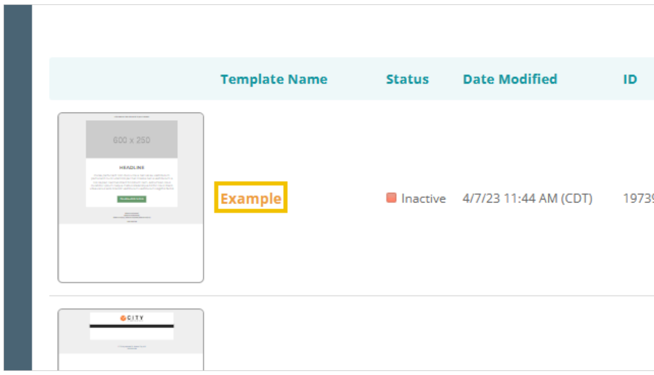
If you are using a Google Font, you will also need to add the Google code in the HTML head content of your page. Click **Edit** to add the code



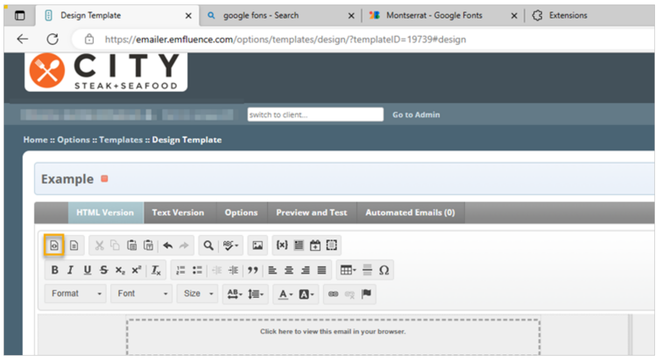
Paste the code from Google Fonts into the head section and click **Save**



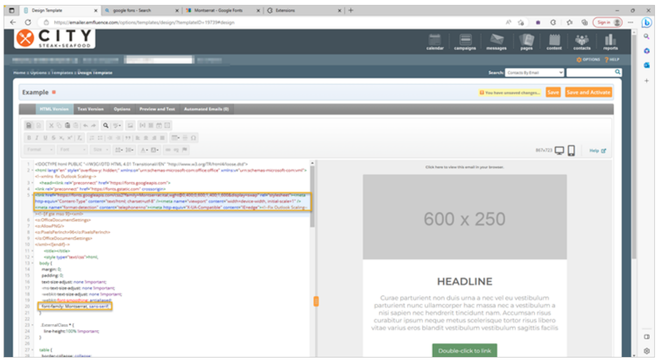
You can also set default fonts on email templates. In **Template Builder**, click on the **title** of the template you wish to edit



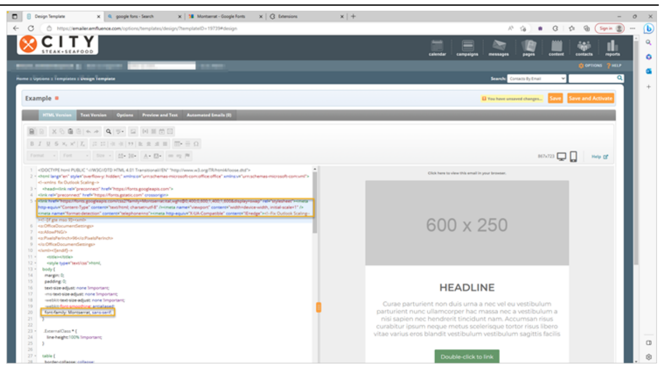
Click on the top-left icon of the editor to enter the code view and edit the code of your template



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.



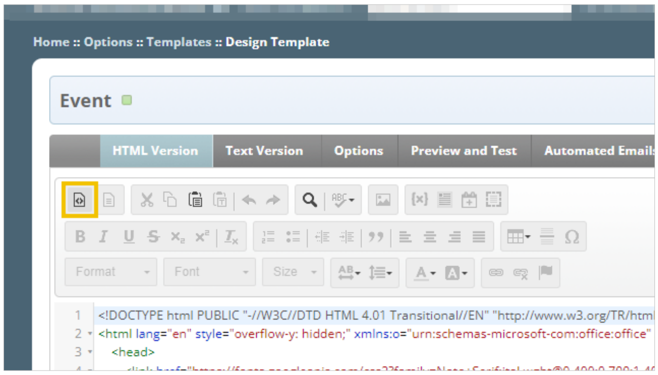
In both examples, you can still apply different fonts on specific text which will overwrite your default. If you don't see your font change after adding your default font, check to confirm sections of you page or email don't have a different font directly applied to them.



15.4.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.

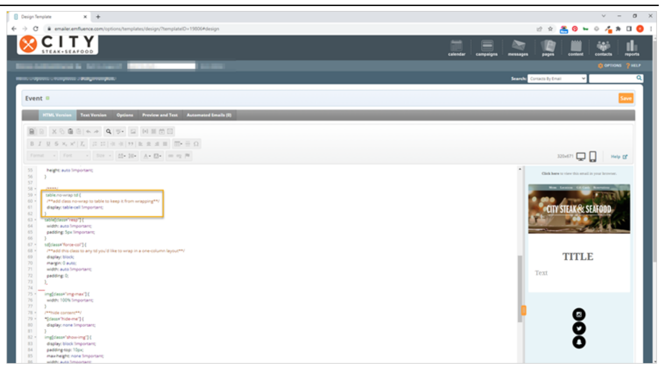
Inside template builder, when editing a template, click the **Source** button to view your template's HTML



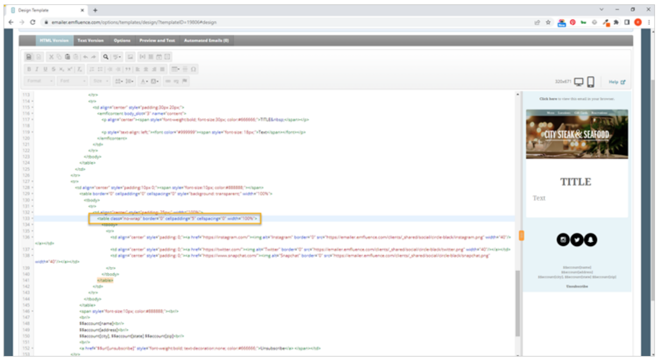
If your template was designed by emfluence, it should have a class setting already listed in the CSS of the head section of your template.

It will look like this:

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



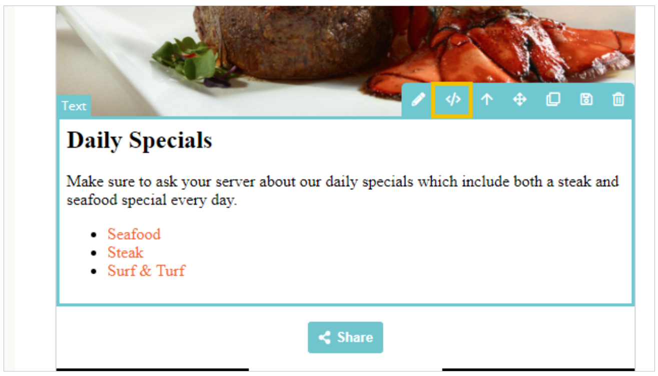
Scroll down to the table you don't wish to wrap on mobile, and add **class="no-wrap"** to the table you don't wish to stack on mobile. In the preview pane you will see the table no longer stacks on mobile.



15.5.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.

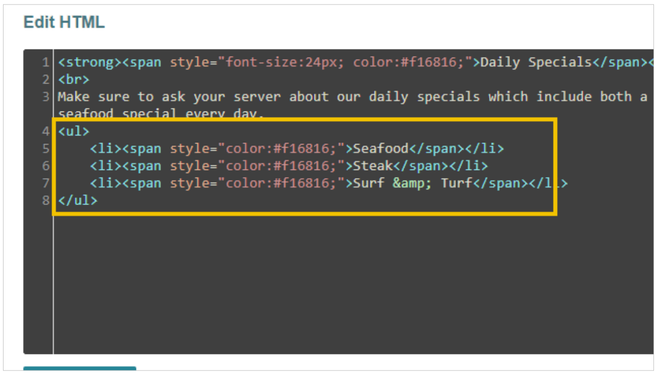
On your text element, click the code icon in the menu to launch the HTML editor.



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.

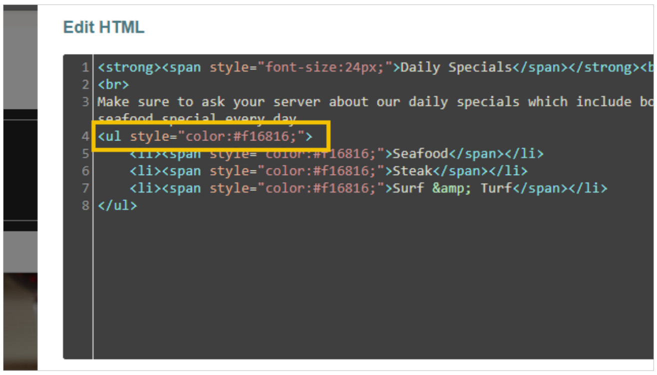
If it is a bulleted list, the list will be wrapped in ol tags.



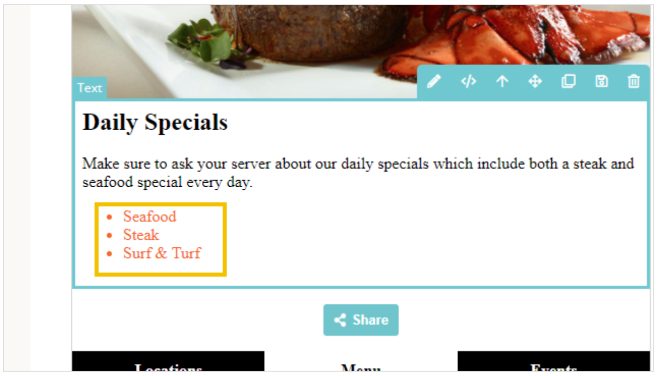
Apply the color style tag used in the separate lines of your list to that top opening tag as well.

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

Click Save & Close.



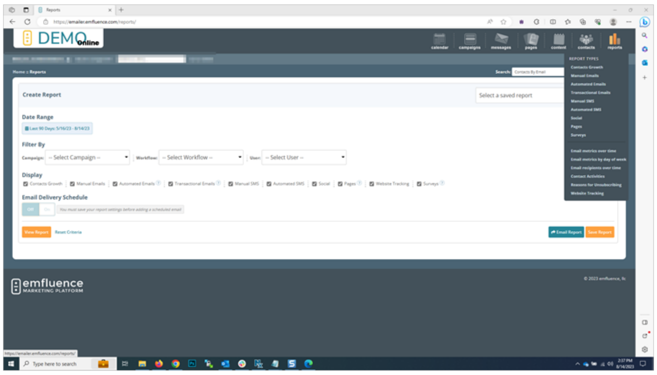
You should see the bullets or numbers now applied with the same hex color as the items in your list.



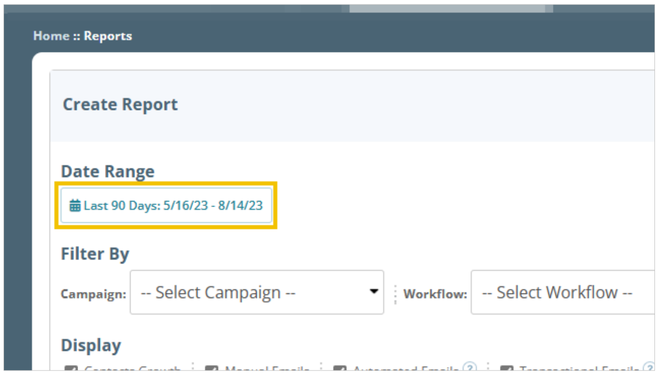
16. Reporting

16.1. Creating a Standard Report

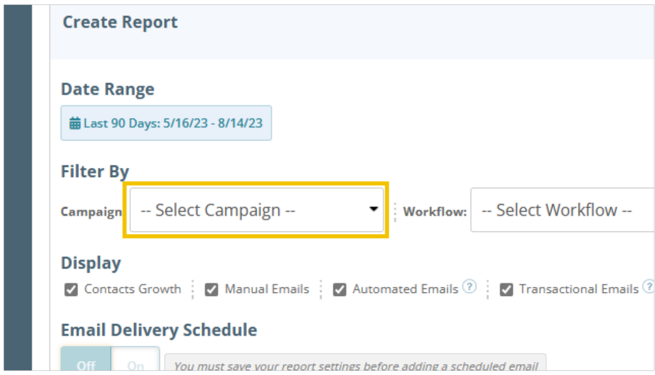
The emfluence Reporting Section can be accessed through the far-right icon on the top of the page. Hovering over the icon will also provide quick links to individual reports.



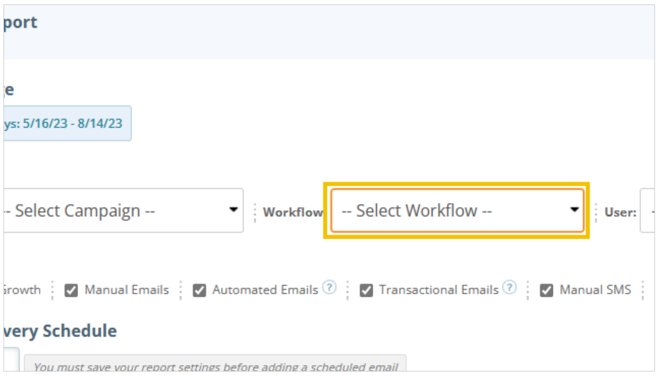
You can edit the time frame of your report using the **Date Range** dropdown. Several pre-set options are available and you can also choose a custom date range.



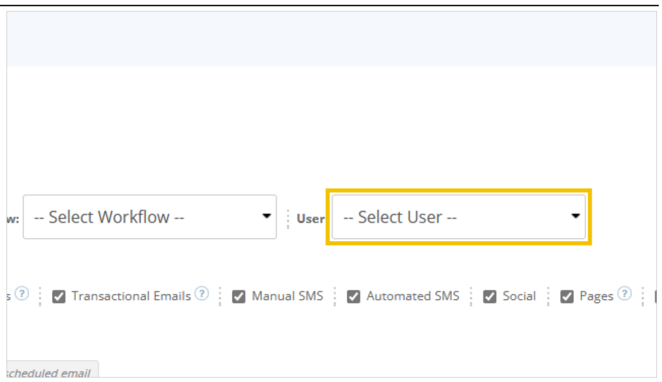
Several filters are available to limit or exclude certain results from your report. You can use the **Campaign** dropdown to limit results to only emails, pages, etc. within that campaign.



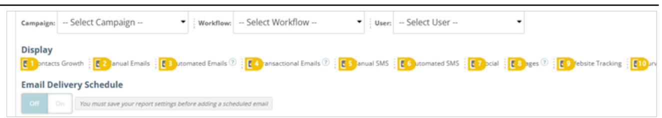
You can use the **Workflow** dropdown to limit the report only to emails within that workflow.



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).

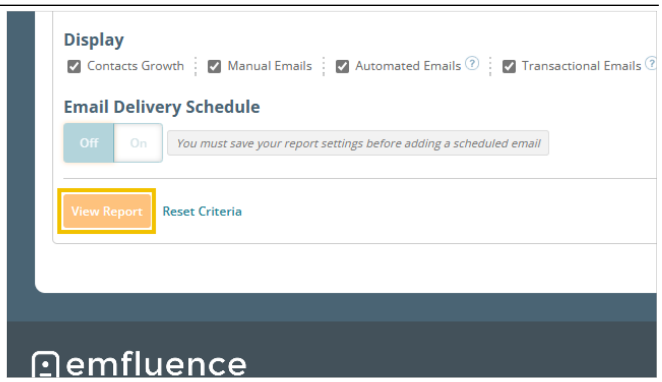


1. **Contacts Growth**: This report will show the number of contacts added, held, and suppressed during the chosen date range. NOTE: Filters for Campaigns and Workflows will not be applied to the Contacts Growth

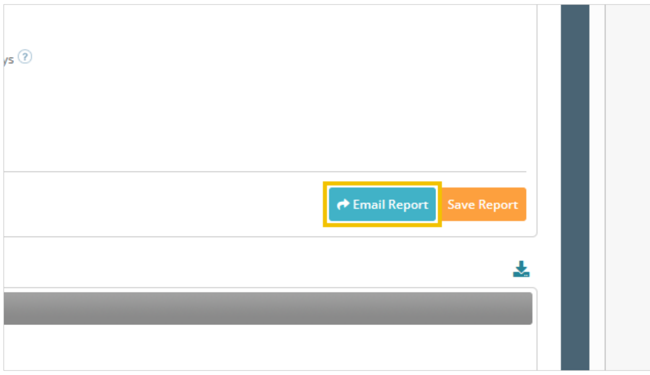
report.

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.

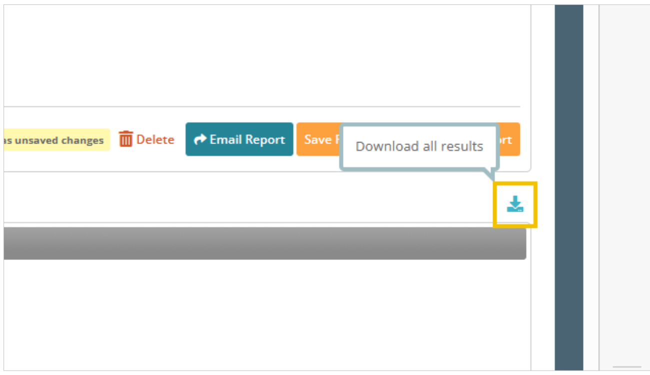
After making your choices on what to include, click **View Report**



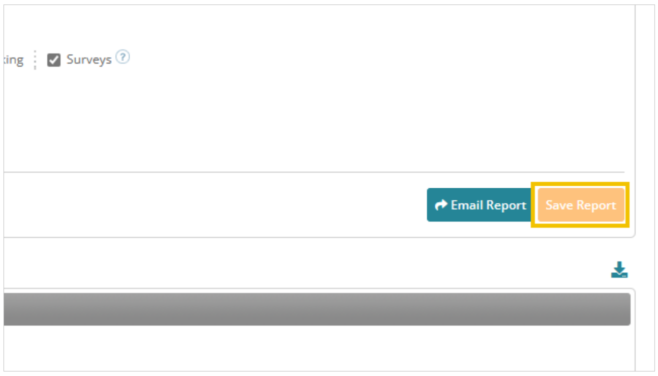
You can use the **Email Report** option to email this report to any user within the platform.



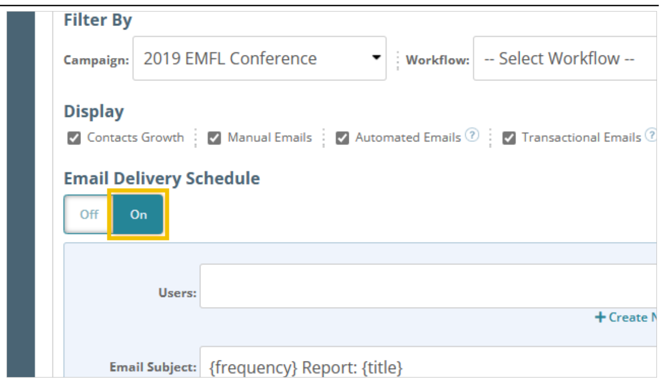
You can download a copy of the report using the download icon



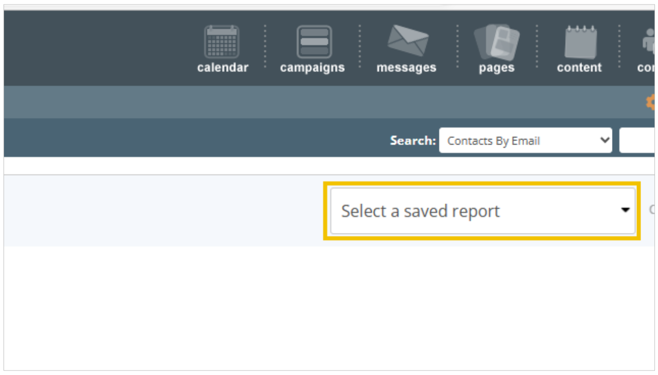
You can also save a copy of the report for yourself by clicking **Save Report** button



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.

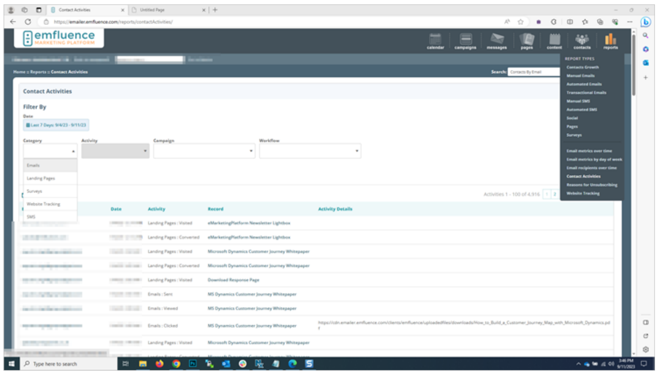


Saved reports can be chosen from the dropdown in the top-right of the Reporting menu.



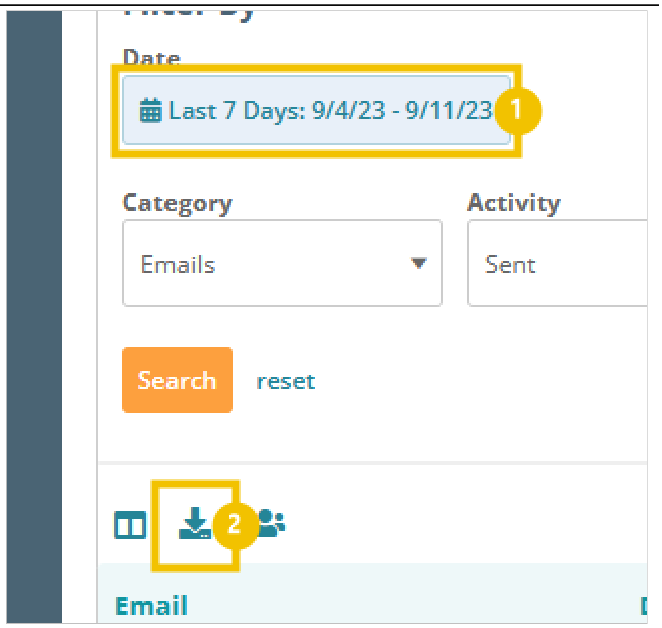
16.2. Contact Activities

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.



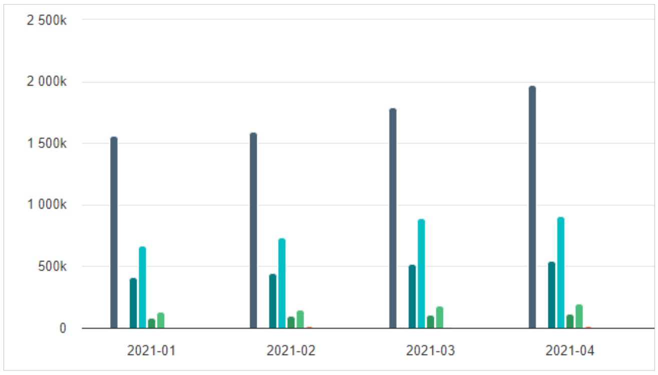
Apply filters to narrow your results such as choosing a category (for example Emails), and and activity within that category (such as emails sent). Optionally further narrow your list by applying campaingn and/or workflow filtering as well.

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

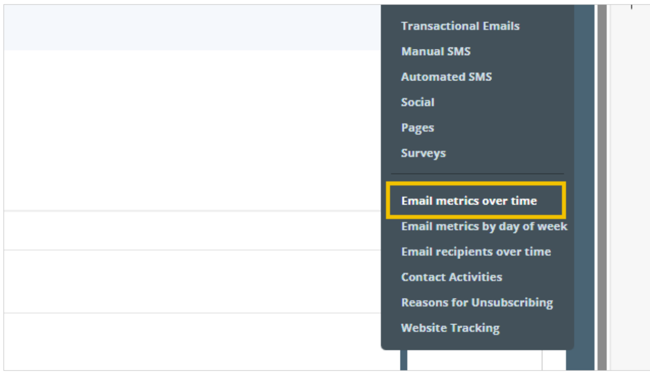


16.3.Email Metrics Over Time

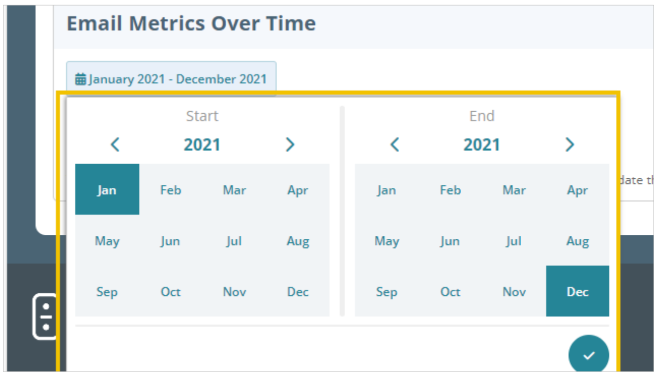
The **Email Metrics Over Time Report** allows you to compare email metrics over an extended period of time. Results will be shown in the graph above with additional metrics shown in the chart below.



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**.

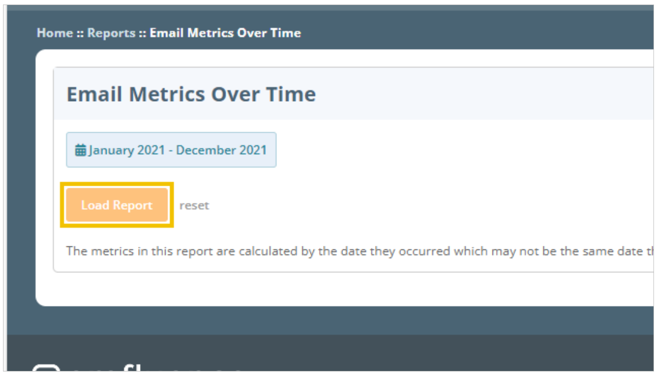


Use the calendar menu to select the date range to run your report.

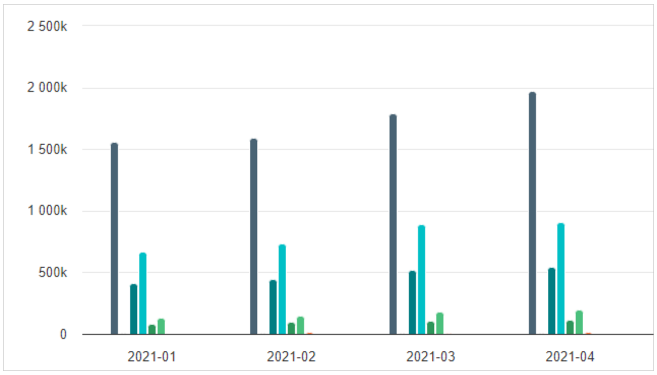


Click **Load Report** to generate your report.

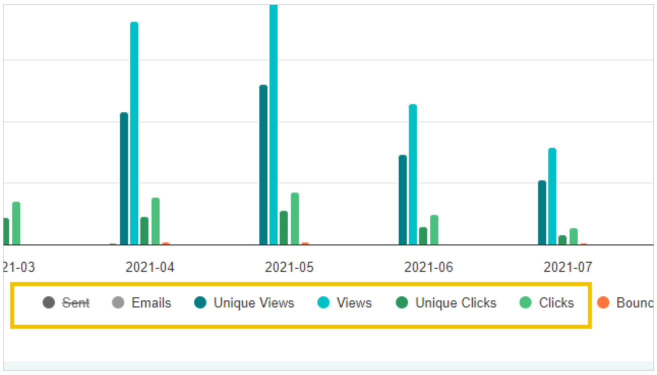
NOTE: Based on the amount of data, it could take a few minutes for your report to be generated.



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

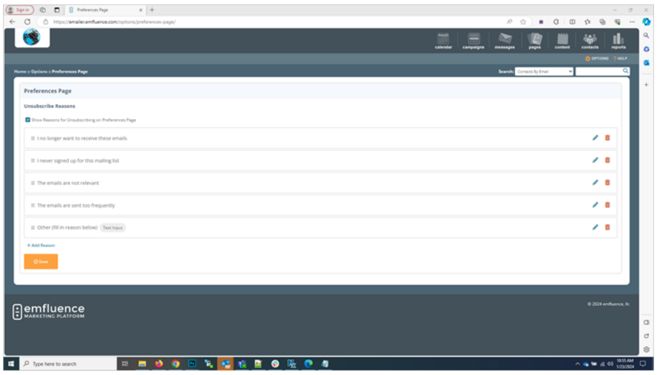


You can remove any metric from your graph, which will redraw it for you, by clicking on any of the filters below such as Sent, Unique Views, Complaints, etc. Clicking a second time will add them back to the graph.



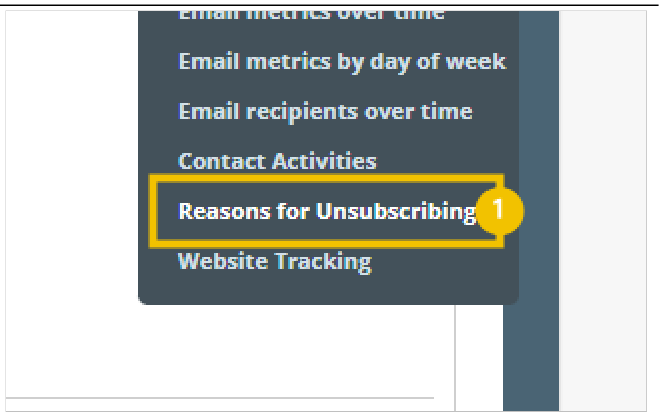
16.4. Reason for Unsubscribing

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



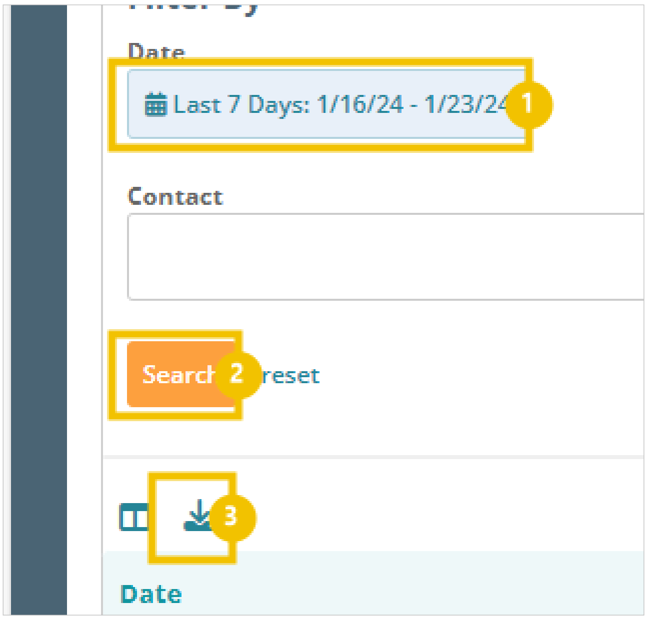
Hover over the Reports icon in the top right of the page and scroll down to click Reasons for Unsubscribing.

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



Unsubsribes 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.

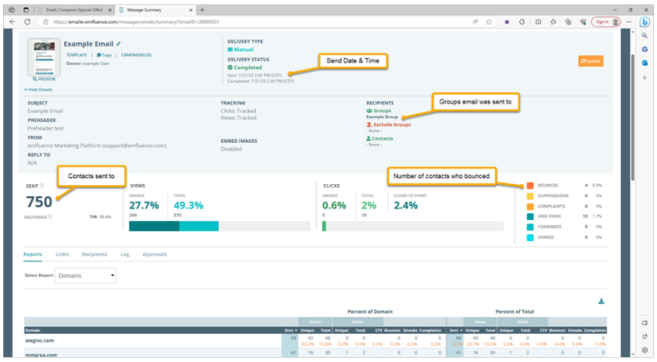


16.5.Email Reporting

16.5.1. Email Metrics

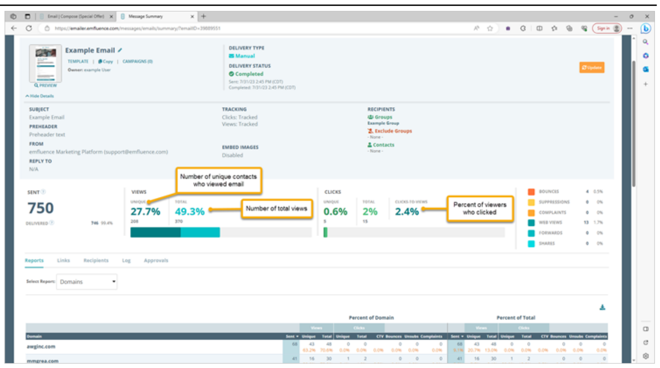
Several email metrics can be viewed on individual email reporting. At the top in the Summary section, you can find the date and time the email was sent, the owner of the email, and the groups the email was sent to.

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.

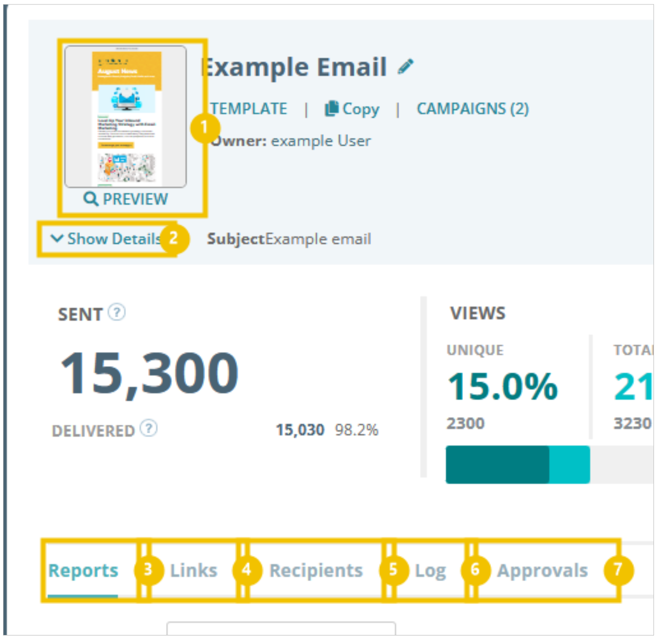


Along with bouncing, you should also keep an eye on both your suppressions (those that unsubscribe from your email) and complaints (those who mark your messages as spam).

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.

16.5.2. Manual Email Reporting

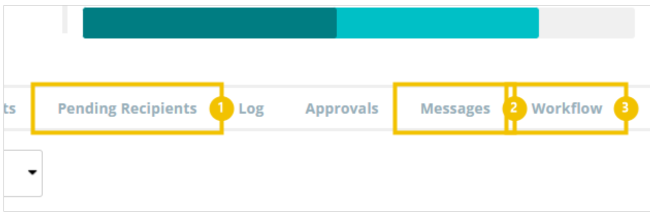
Several pieces of information can be found on the summary page of a sent email.



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.

16.5.3. Automated Email Reporting

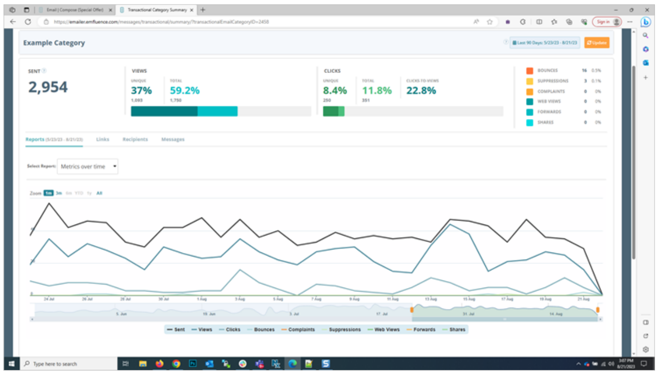
Automated Emails will have much the same reporting as manual emails with a few additional points of interest.



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.

16.5.4. 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.

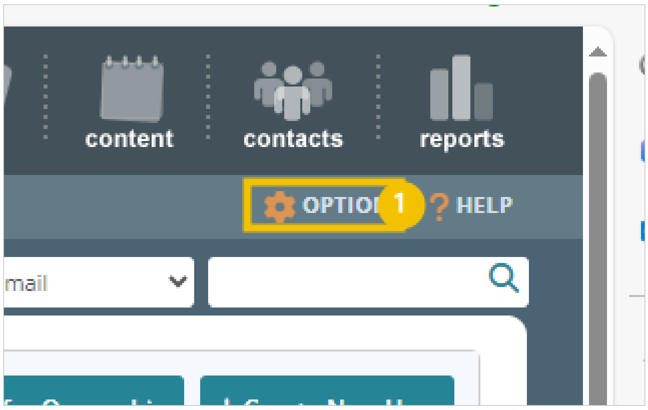


17. Users

17.1. Create a User

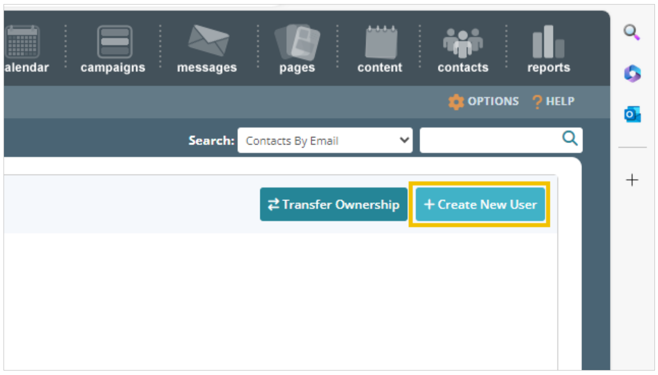
Client Admins can create new users and edit user permissions within the Options menu under System Users.

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

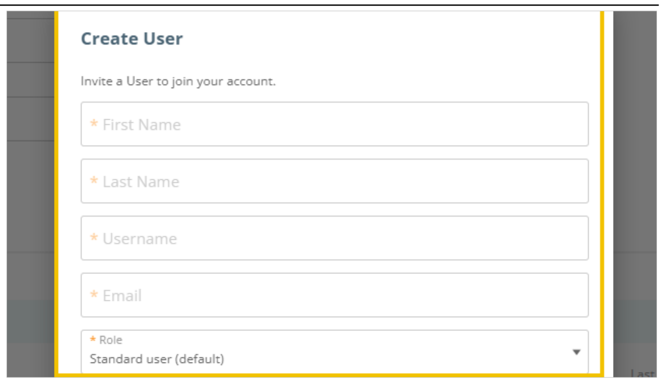


To create a new user, click on **Create New User** in the top right of the screen.

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.

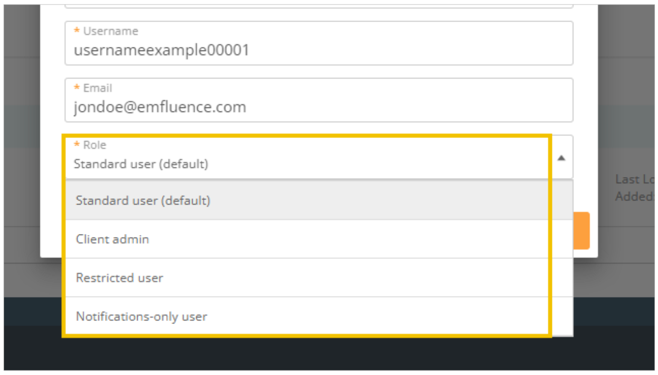


Fill out the required fields in the **Create User** modal. While multiple users can share the same email, usernames must be distinct across all emfluence platform accounts.

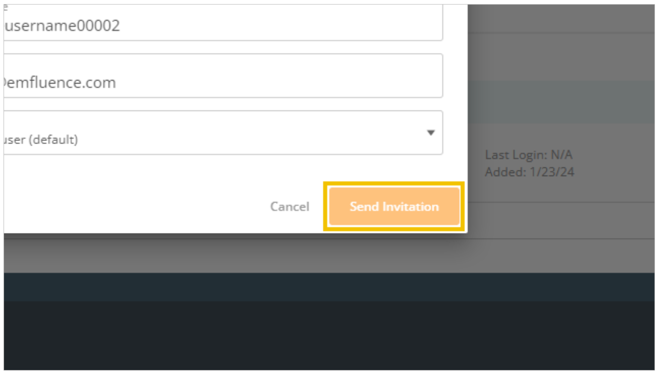


Choose the starting role for the new user.

- **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.

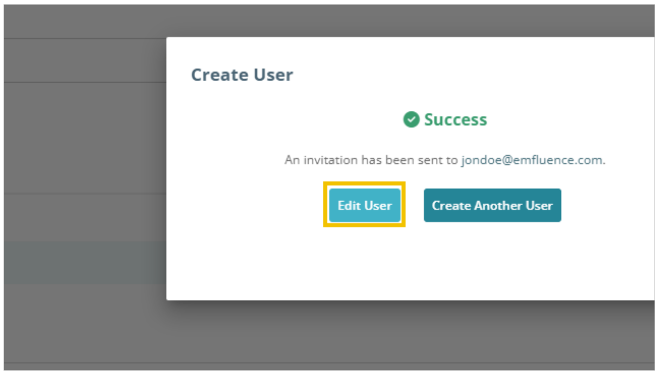


Next, click **Send Invitation** to create the user and trigger an email to the new user to set up their password. The invite will last about a day. If the invite expires, you can trigger another one by clicking the Invite icon next to their user in the list view.

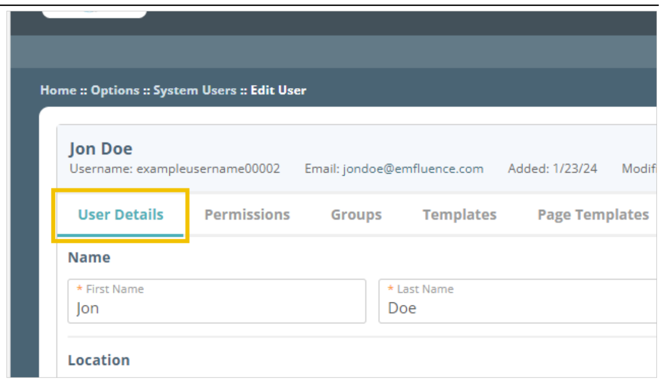


Next, you have the choice to close the modal, edit the user you have created, or create another user. If you choose to exit or create another user don't forget to return to this user to edit its permissions at some point.

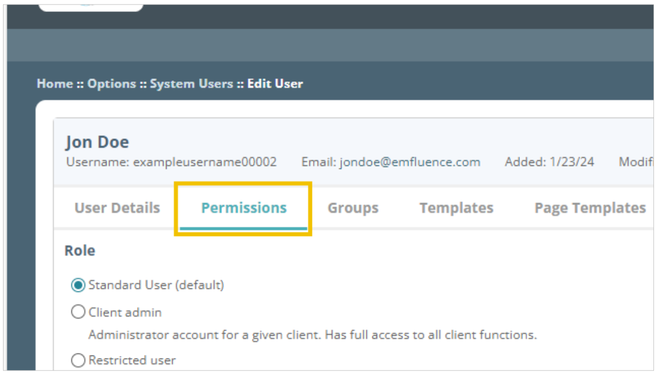
To edit permissions, click **Edit User**.



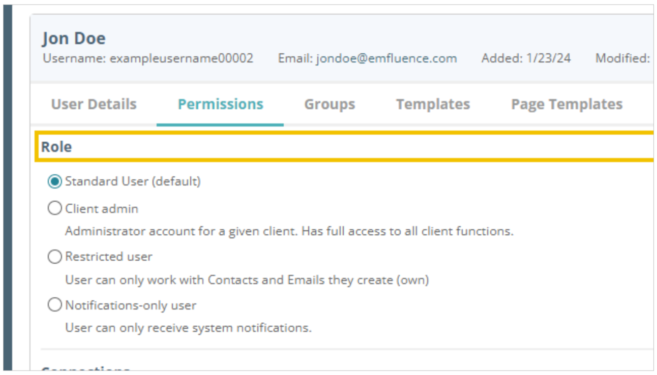
Here, you can edit the user through a series of tabs at the top of the screen. Under **User Details** you can update any personal information about the user. Each user will have access to their own User Details page as well.



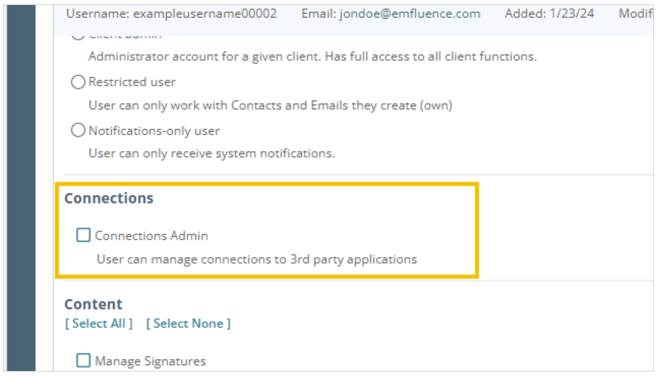
Under **Permissions** you can assign specific permissions to the user. By default, Client Admins get all permissions listed, but you can still check the boxes for individual permissions if you wish.



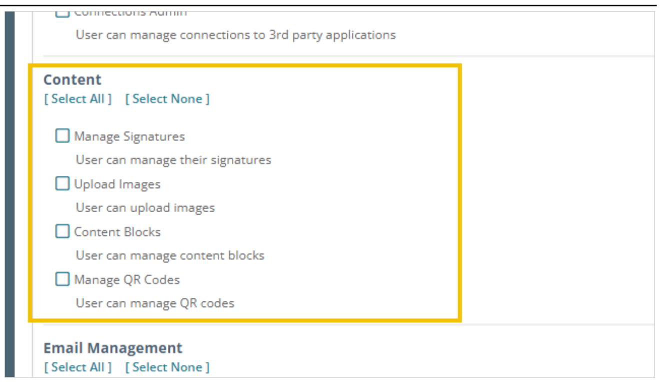
Under **Role** you can change the base permission of the user. NOTE: If you downgrade a client admin to a smaller role, their permissions will be drastically reduced as while they received access to groups, templates, etc. automatically when they were created they weren't explicitly given access to those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

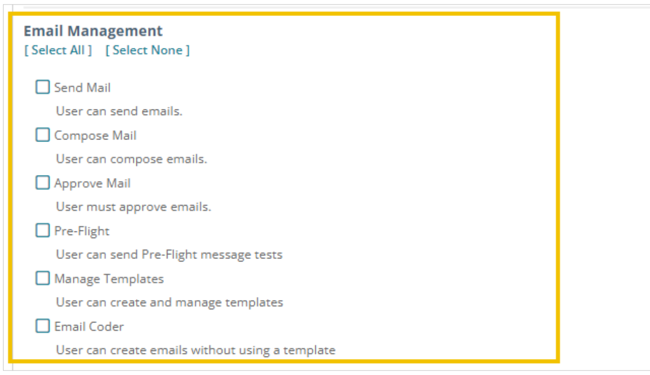


The **Content** permissions give access to specific sections of the platform under the Content menu. These include Content Blocks & Signatures, the ability to upload images and see images in the Upload Files menu, and manage QR Codes.

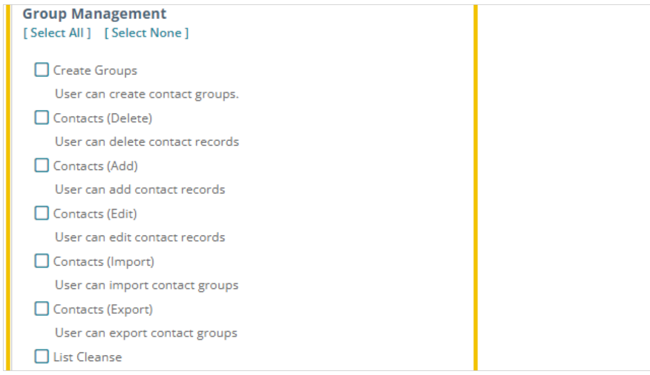


Under **Email Management** you can choose what permissions tied to email a user will receive including the ability to compose and send email, email approval, and access to pre-flight, template builder, and the paste-in-code option to create an email without a template.

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

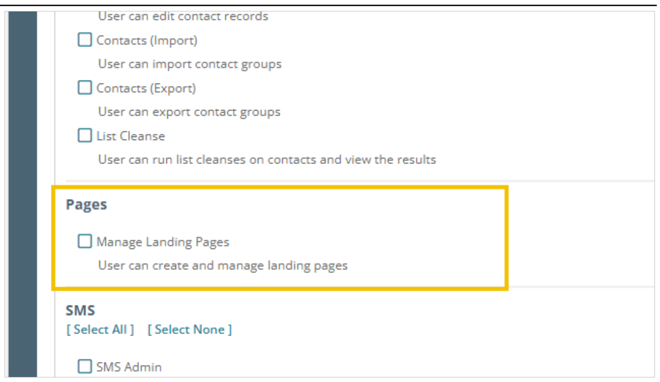


Under **Group Management** you can control what permissions the user has in relation to contacts and groups including creating groups, deleting groups, adding contacts, editing contacts, importing lists, exporting lists, and access to the list cleanse feature.



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

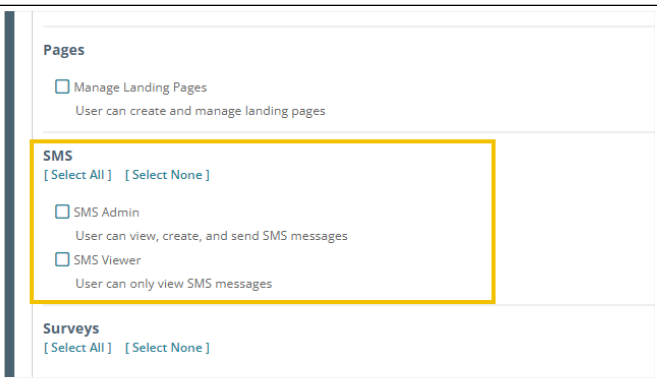
NOTE: If the user is not a client admin, and they need access to pages they did not create, access to those pages must be given to them individually.



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.

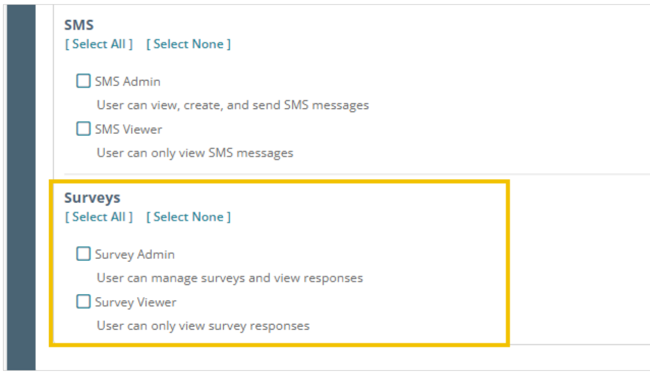
NOTE: SMS must be enabled in your account for these permissions to apply.



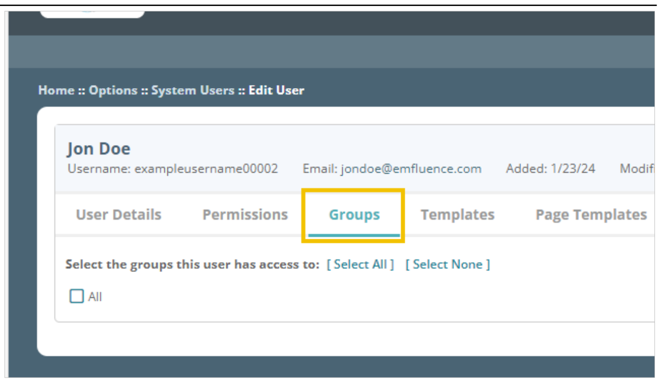
Under **Surveys** there are two permissions available.

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

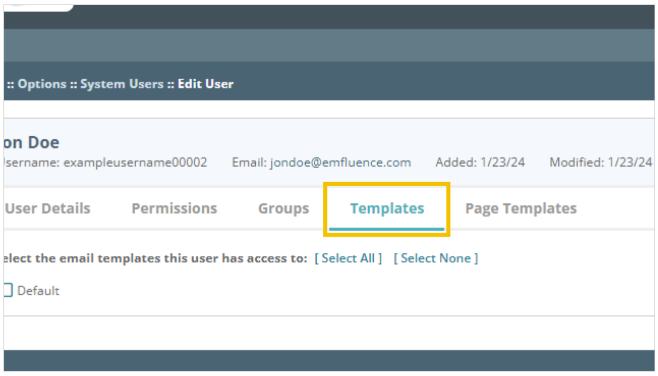
NOTE: As with landing pages, users who are not client admins will need to be given access to individual surveys for them to have access to those surveys.



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

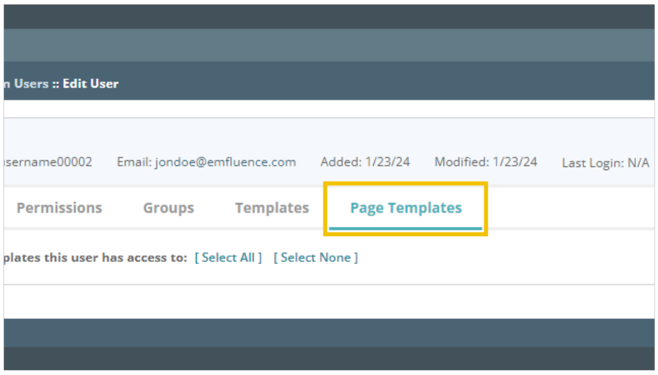


Under the **Templates** tab you can assign users specific templates. Users can only send emails using templates they have access to.



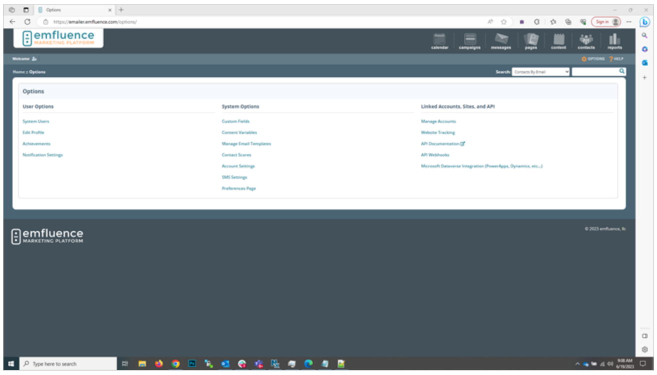
Under **Page Templates** you can assign any page templates to this user.

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



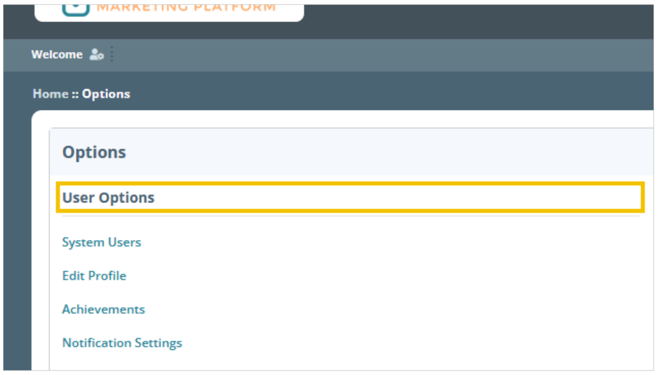
17.2. User Options

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.



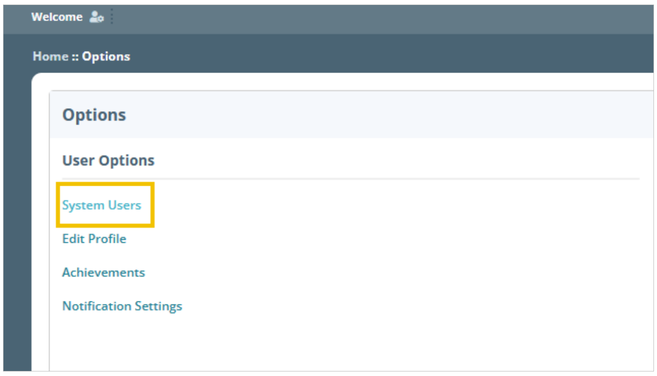
Under **User Options** you will find options to edit, add, or delete System Users, edit your own user's profile, examine your achievements within the platform, and change your notification settings.

NOTE: Some menus will require client admin level access.



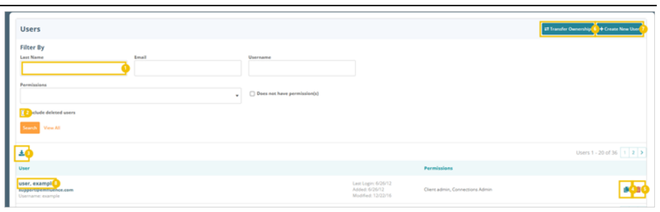
17.2.1. System Users

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



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

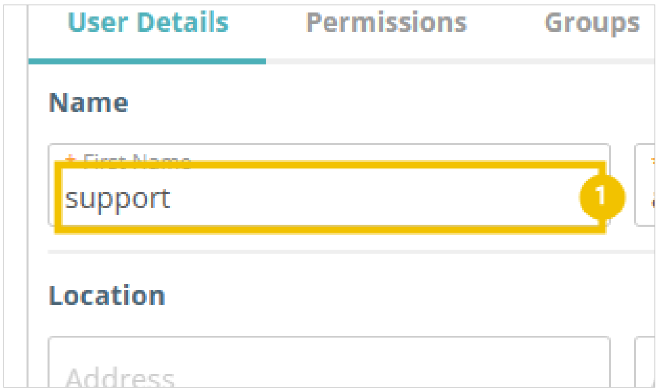


create a new user.

8. **Edit User**: You can edit a user by clicking on their name.

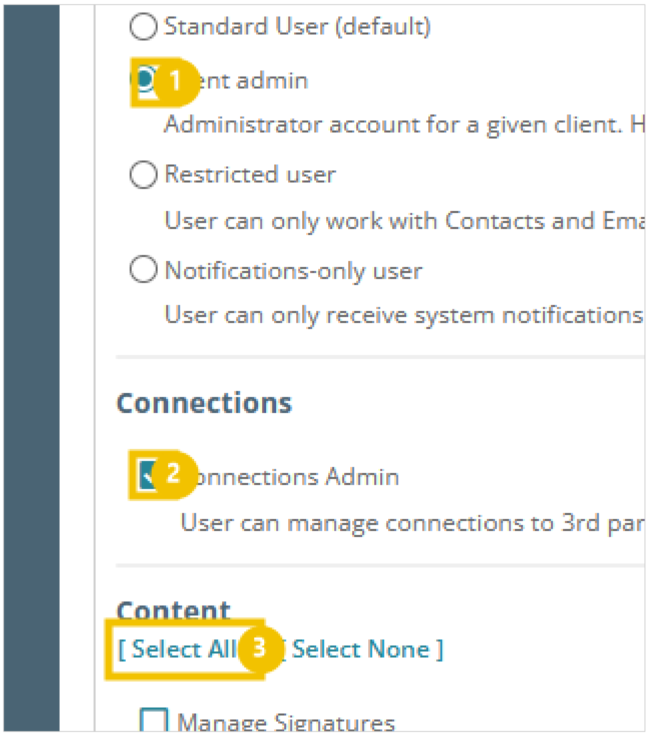
Under User Details you can edit information on the user's record. At the bottom of the page, the user can also edit their security settings such as altering their username or email, turning on/off two-factor authentication and trusted devices, and creating API access tokens. These security options are 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.



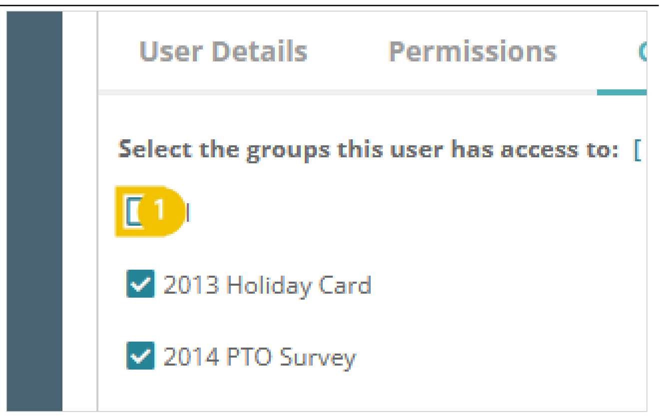
Under Permissions, you can edit the permissions of what the user has access to within the emfluence Marketing Platform.

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.



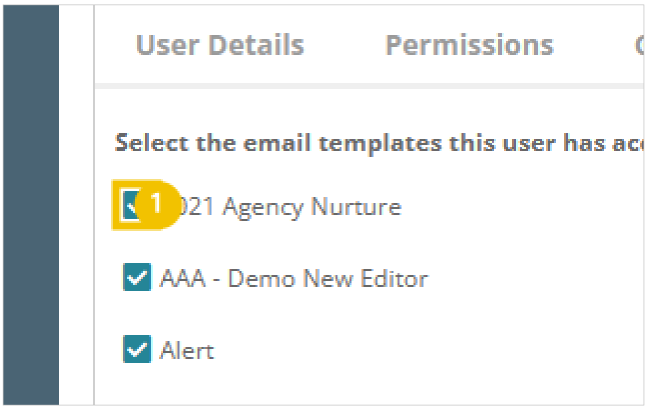
Under Groups, edit the Groups the user can see and access.

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.

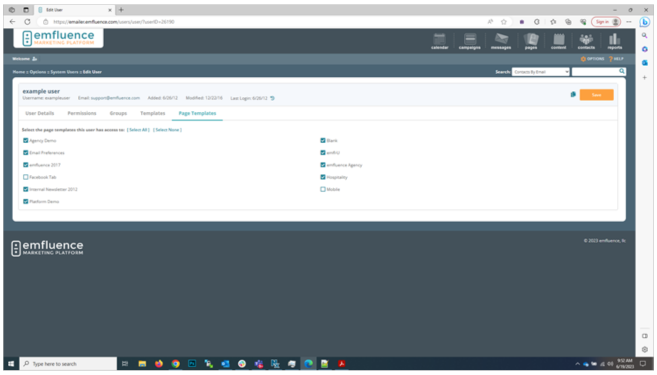


Under Templates, control which Email Templates the user has access to within the account.

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

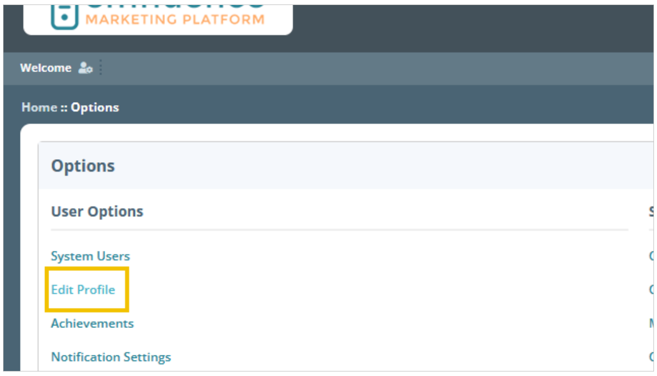


If your account includes any Page Templates, you can add access to them here. NOTE: Most newer accounts do not have page templates and use page themes instead.

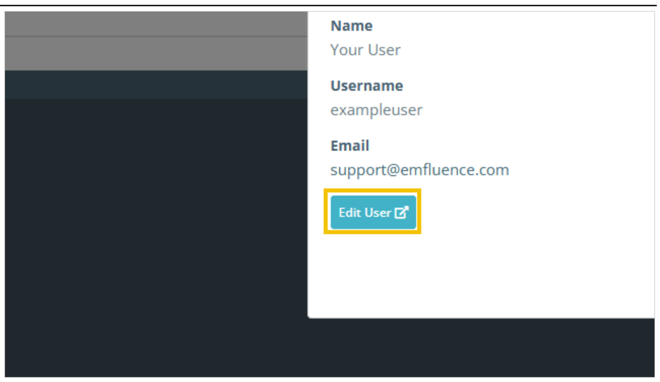


17.2.2. Edit Profile

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.

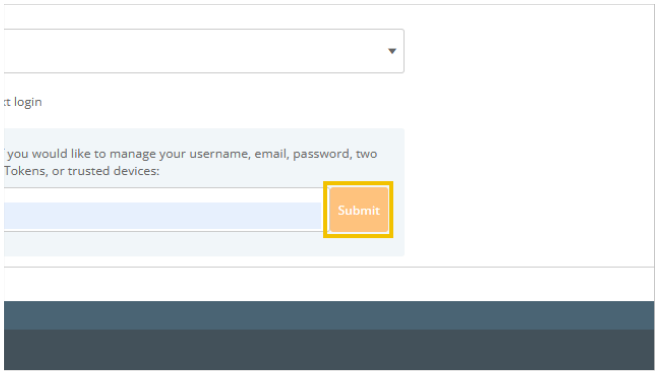


In the pop-up, click on the link **Edit User**



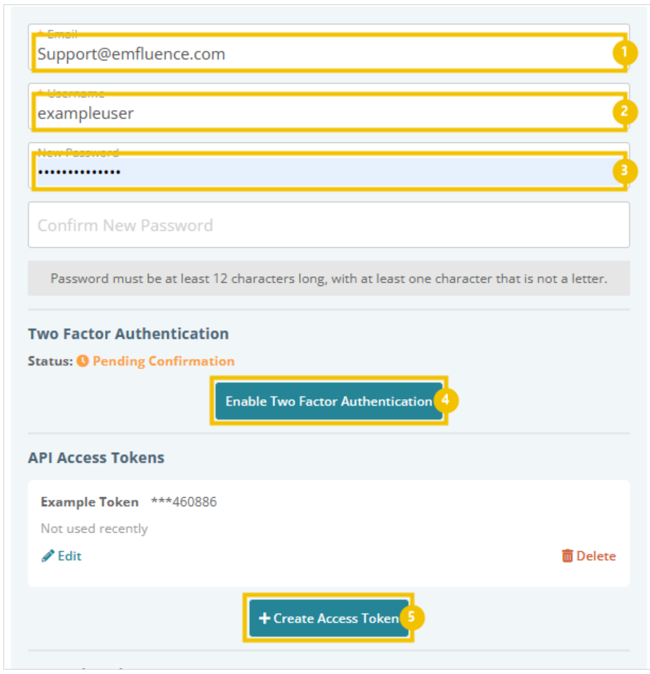
As when a Client Admin edits a user, you will see the user fields at the top of the page that can be edited. If you are also and admin, you will see and have access to Permissions, Templates, etc.

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.



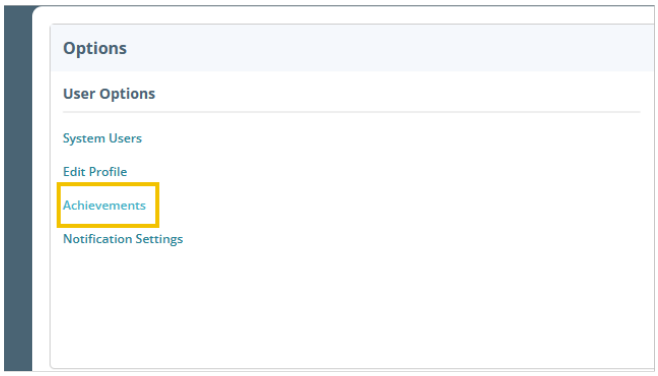
After unlocking the Security section you can edit your email, password, and username, turn on two-factor authentication, create access tokens, and see your trusted devices.

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.

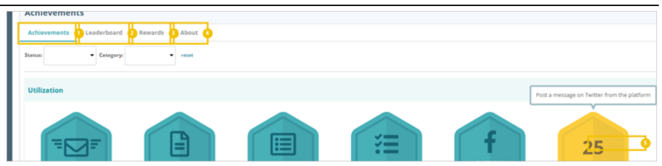


17.2.3. Achievements

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

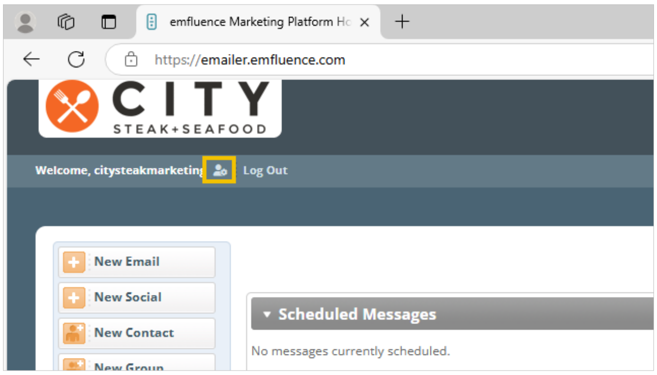


1. **Achievements**: See list of earned and available achievements.
2. **Leaderboard**: See the current leaderboard of achievements for emfluence users.
3. **Rewards**: Check out reward levels available when accumulating points on completed rewards.

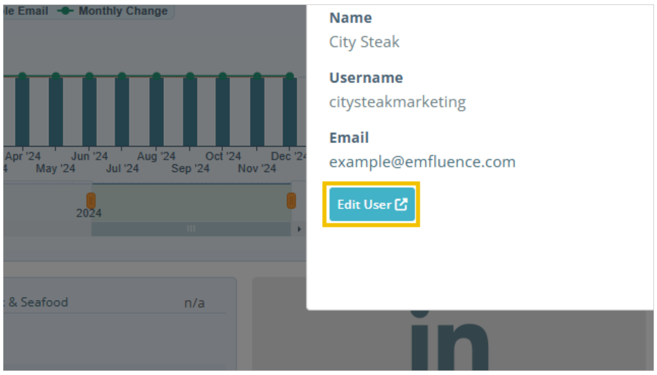
4. **About**: Learn more about rewards.
5. **Point Value**: When hovering over a completed reward, the icon will flip showing the accumulated points.

17.3.User Profile & Security Options

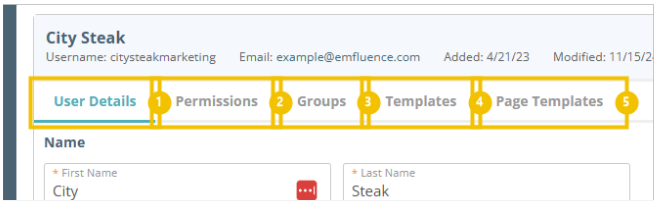
To edit your user profile, click on the icon next to your username at the top of the page.



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



The User Record shows the data, permissions, and access saved for the user.

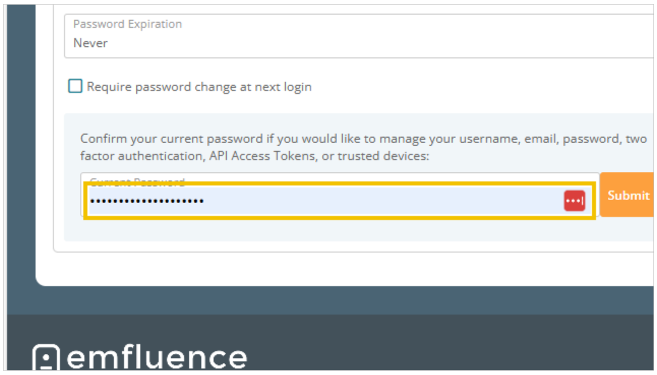


1. **User Details**: This tab allows you to edit the basic information of your user including name, location, and contact information.
2. **Permissions**: Permissions allows you to change the permissions of the user you are viewing. Only Client Admins have access to this tab.
3. **Groups**: Groups allows you to add/remove access to groups within the account. Only Client Admins have access to this tab.
4. **Templates**: Templates allows you to give a user access to specific email templates within an account. Only Client Admins have access to this tab.
5. **Page Templates**: Page Templates allows you to assign legacy page templates (mostly phased out by the the addition of Page Themes) to a user within an account. Only Client Admins have access to this tab.

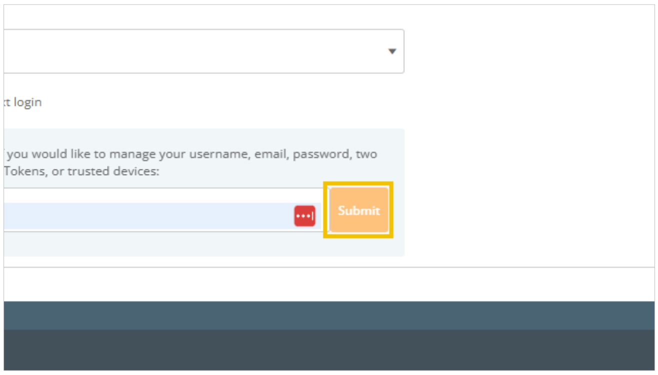
17.3.1. Security

At the bottom of the User Details tab, you can unlock the Security section which allows you to make changes to your user's email address, password, add two-factor authentication, see and edit trusted devices, and create API tokens.

NOTE: The user's security section is available only to that user. No one else can access or edit this information for them. Reseller user security is controlled in the reseller portal.

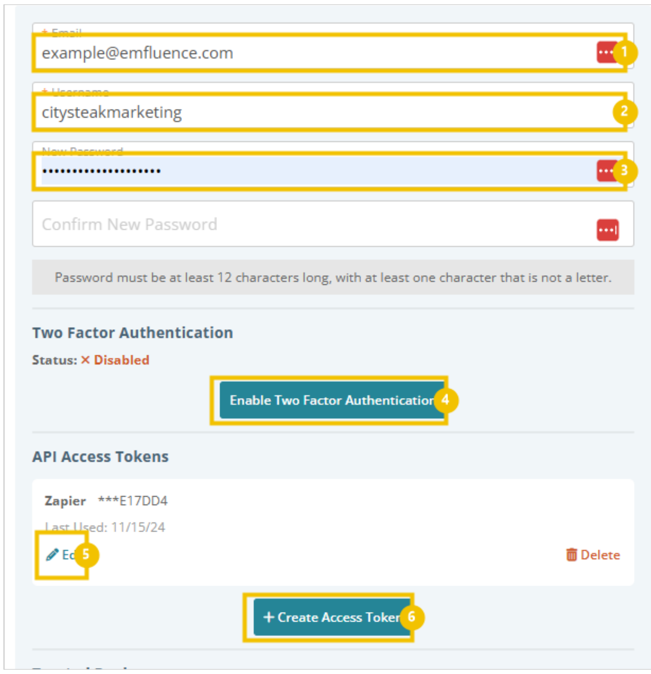


To access the Security section, confirm your password and click **Submit**.



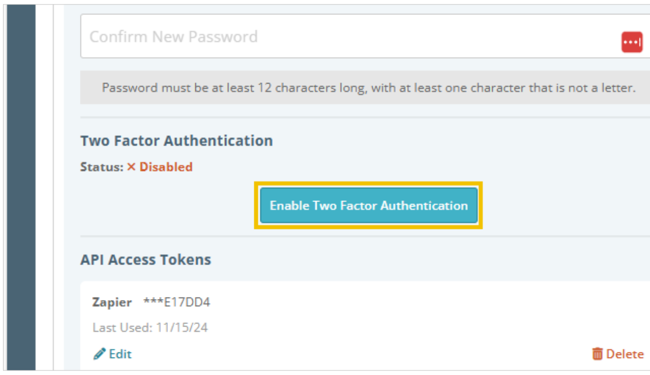
Now unlocked, you are able to edit the information in the Security section.

1. **Email**: Change the user's email address.
2. **Username**: Change the user's username.
3. **Set Password**: Set and confirm a new password.
4. **Enable Two Factor Authentication**: Enable Two Factor Authentication
5. **API Access Tokens**: View and edit any current access tokens.
6. **Create Access Token**:

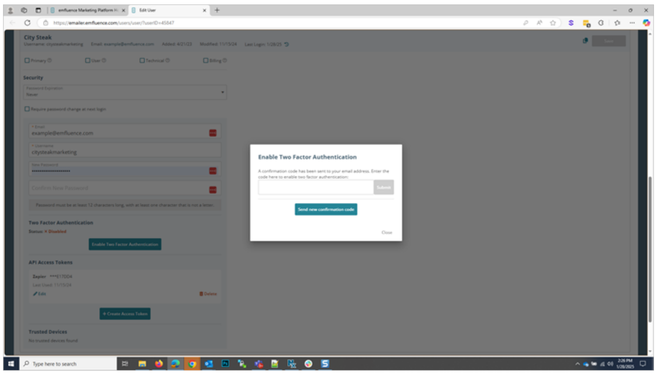


17.3.2. Two Factor Authentication

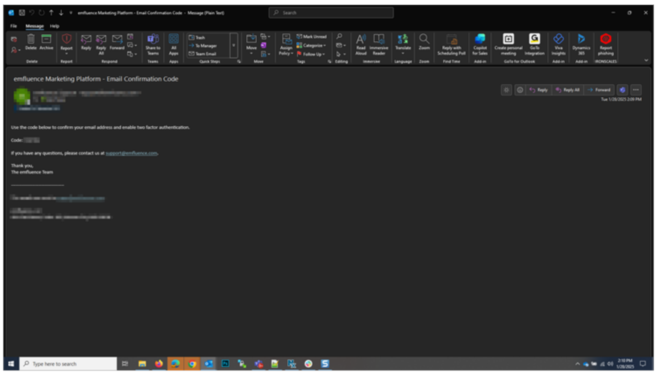
To set up two factor authentication, click the button **Enable Two Factor Authentication**



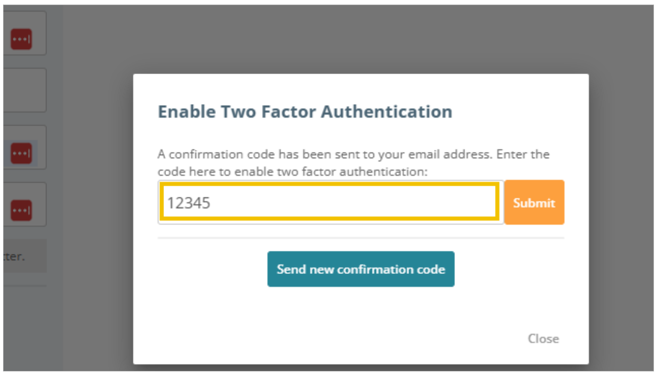
A confirmation code will be sent to the email address on file for your user.



In your inbox, find the email and copy the code.



Copy the code from the email and click **Submit**.

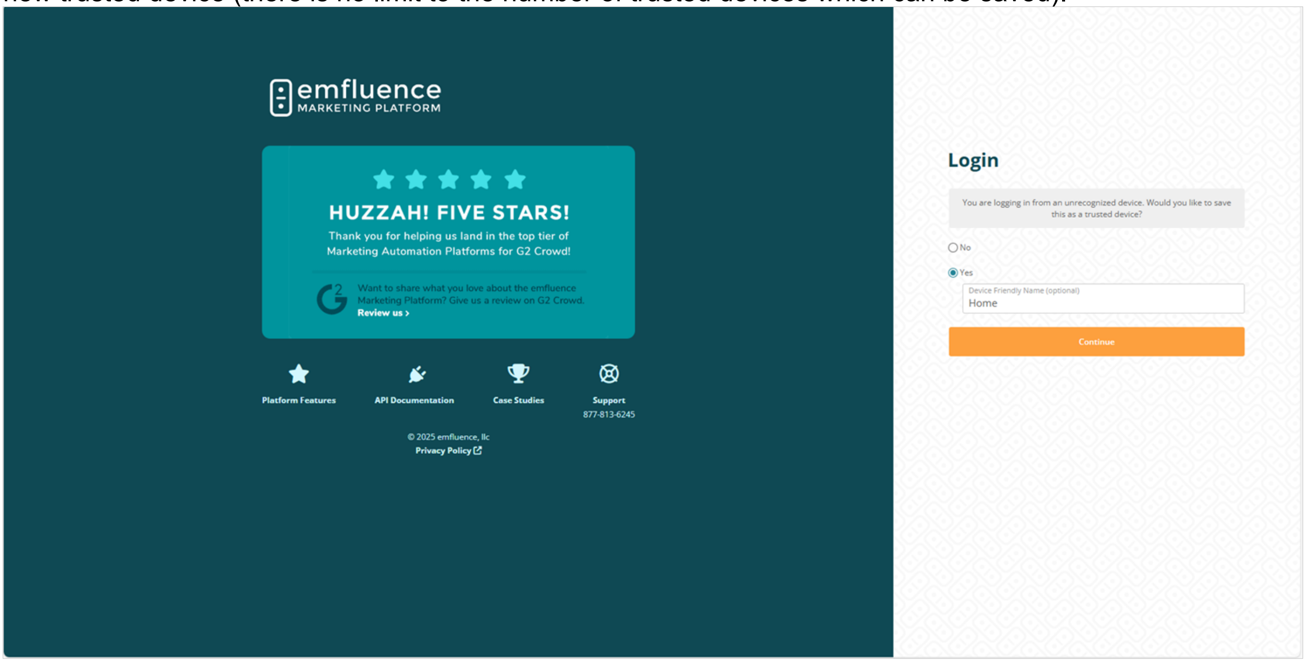


Every time you log in from an untrusted device you will receive an email and be forced to enter the code provided. To prevent having to put the code in on every single login, you can save trusted devices.

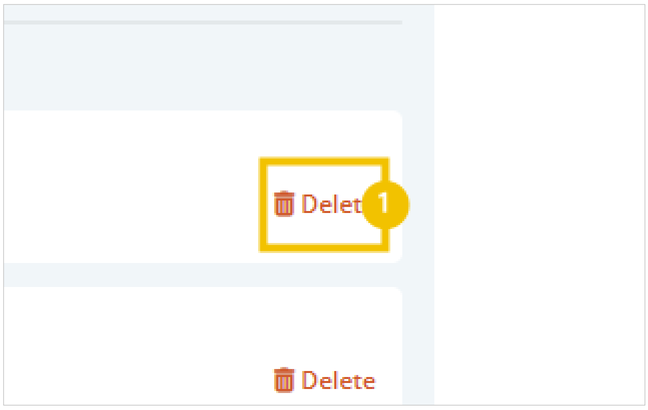
With trusted devices saved for your user, you will only need to complete two-factor when logging in from an untrusted device or if the last two-factor sign-in for your user was more than 30 days ago.

17.3.3. Trusted Devices

Every time you log in from an unrecognized device or location, you will be prompted to save that as a trusted device with a friendly name. A trusted device is a combination of IP address, browser, and computer operating system. If any, or all, of those are different than a previously saved device, you will be prompted to save as a new trusted device (there is no limit to the number of trusted devices which can be saved).



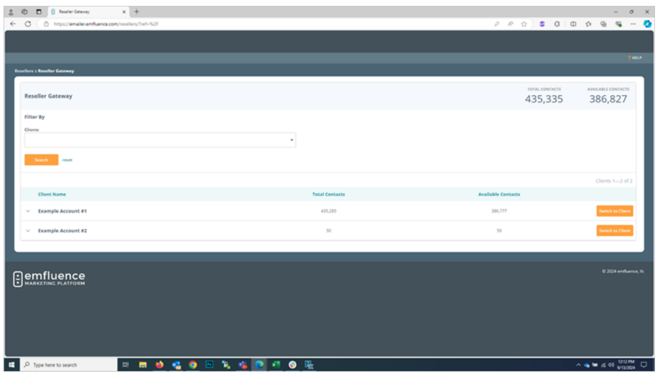
Your list of trusted devices can be seen in the unlocked Security section. If you see devices that don't appear to be yours, you should take steps to immeadiately change your password.



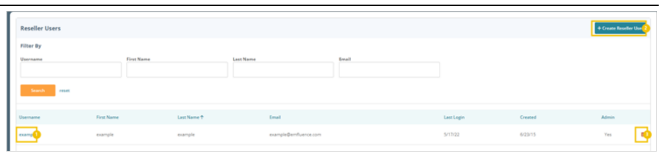
1. **Delete**: If there is a device you no longer need (a one-time coffee shop visit, a location used on vacation, etc.) you may choose to remove that device from your list. To remove a trusted device, click on the delete icon to the right of that device.

17.4. Reseller Overview

emfluence reseller clients are set up with a reseller login allowing them to jump between different subaccounts. Logins for resellers work the same as regular users except the first screen resellers will see is the reseller gateway providing access to their individual accounts.



Reseller users are controlled throught reseller admin. For reseller admins, this allows them to see and edit all existing users as well as create new users.

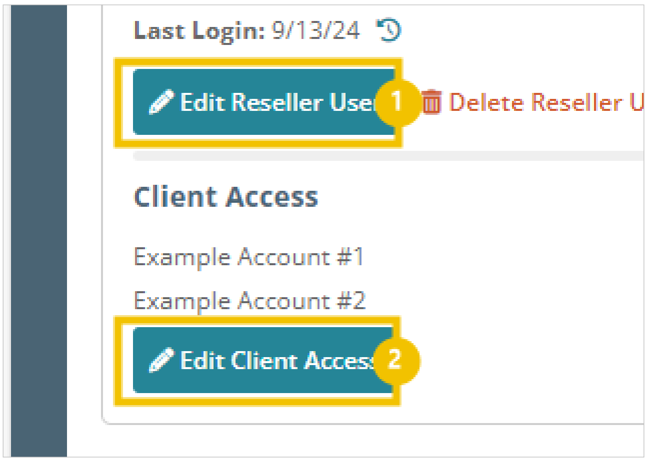


1. **User**: Click on any user to edit thier access and permissions.

2. **Create Reseller User**: Create a new reseller user
3. **Delete**: Delete a reseller user

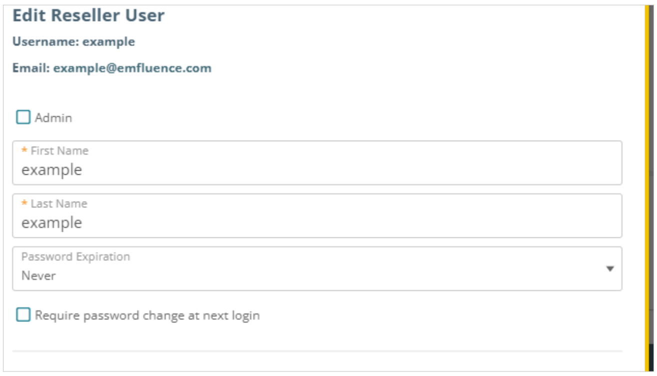
A user record is divided into two separate sections.

1. **Edit Reseller User**: This allows you to edit the starting permissions of a reseller when they are granted access to an account. NOTE: Subaccount permissions trump default settings, changes made afterwards will not affect currently set permissions.
2. **Edit Client Access**: This allows you to choose which individual accounts this user should have access to. Whatever permissions are saved on the reseller default will be the permissions that user is granted when they are given access to an individual account.

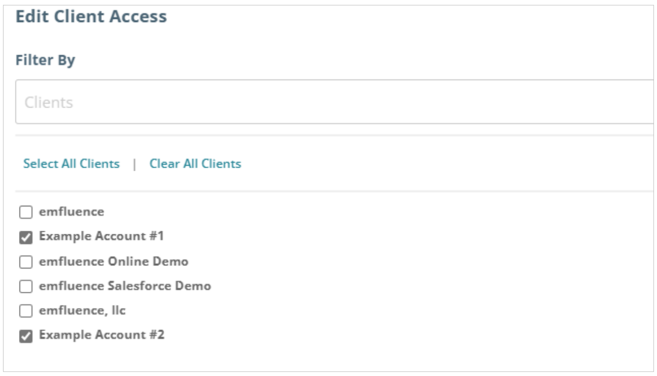


Creating or editing a reseller user allows you to set the basic information for that user. Changes to the password, etc. are only available to the individual user not the reseller admin.

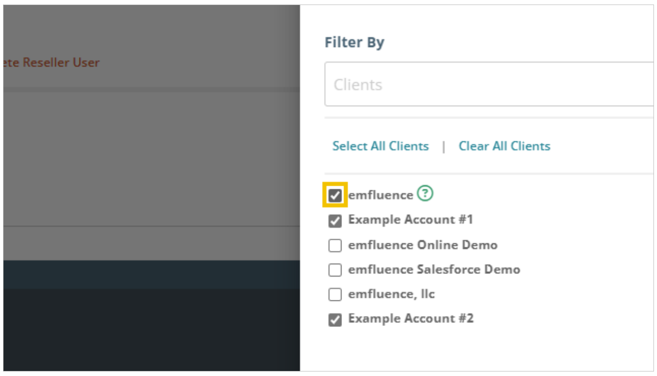
Next, choose which permissions to set for the default of this reseller user. If you do not choose permissions, any access given will have no permissions in the individual accounts.



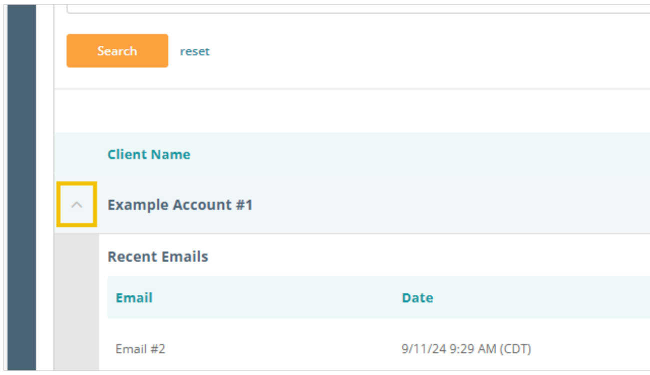
Editing Client Access will show what accounts the user currently has access to. If you uncheck a box that access will be removed and the subaccount user in that account will be permanently deactivated.



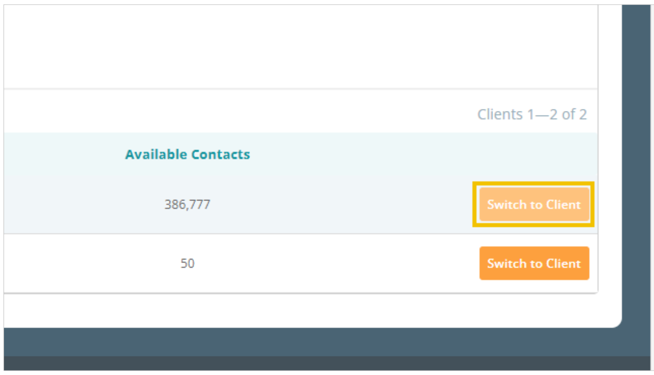
Checking the box to an account will create a new subaccount user in that account copying over the default permissions saved on this reseller user.



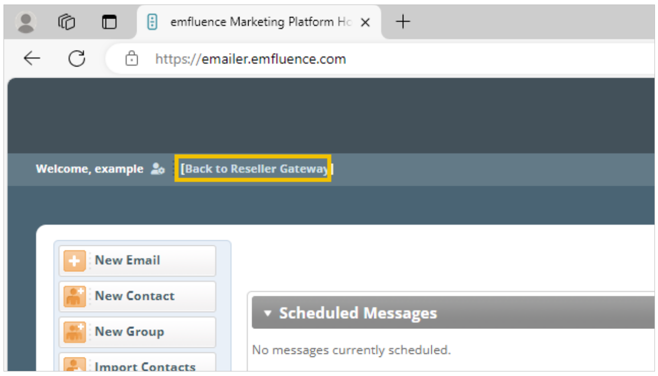
On the main reseller gateway screen, you can expand any account you have access to in order to show some recent email activity in that account.



To log into an individual account, click the button **Switch to Client**. This will redirect you to that individual client account.



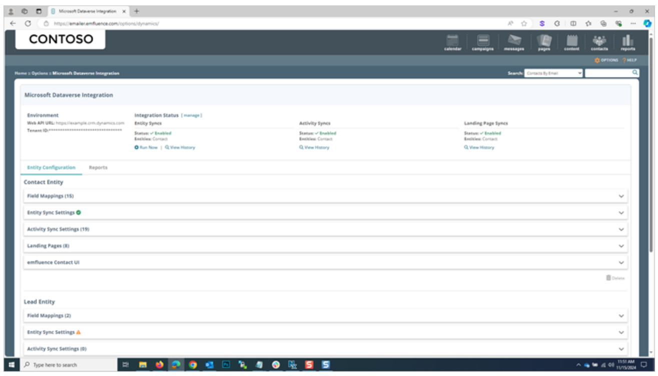
To return to the gateway, click the link at the top for **Back to Reseller Gateway**.



18. Integrations

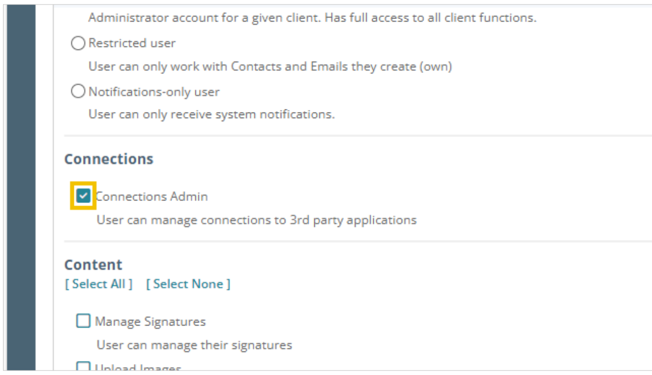
18.1. Dataverse

You can connect Microsoft products such as Dynamics or RapidStart through the use of the Dataverse integration which allows for data to be passed into the emfluence Marketing Platform and metrics to be sent back to the CRM.

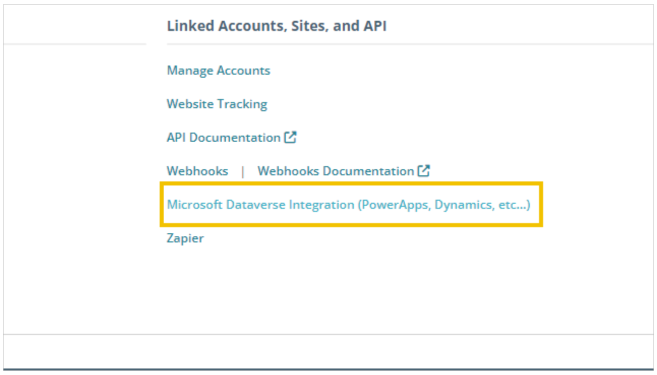


In order to access the Dataverse integration the user must either be a **Client Admin** (who gets all permissions by default) or explicitly have the **Connections Admin** permission. If the user is not a client admin, make sure to also provide contact permissions and group access.

NOTE: The user setting up the integration will be tied to it. We highly recommend giving them full permissions as lack of specific permissions may cause errors in the sync.

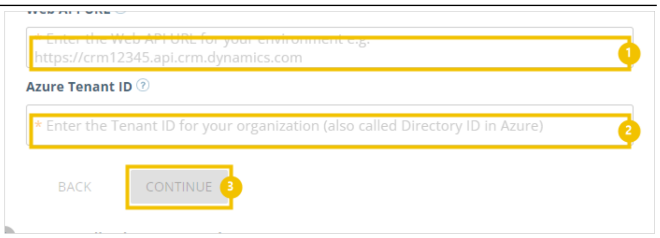


The integration is located in the **Options** menu under **Microsoft Dataverse Integration (PowerApps, Dynamics, etc...)**

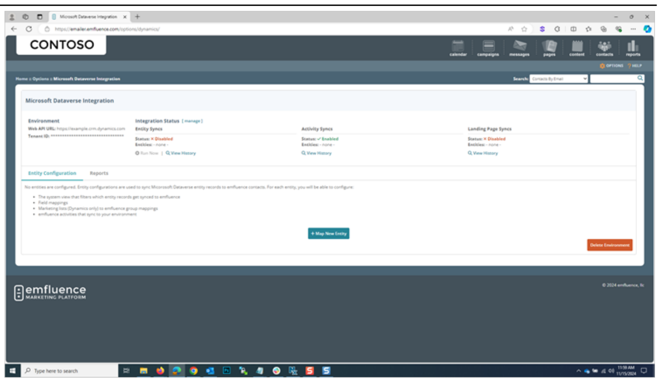


In order to connect, you will need to obtain both the Web API URL and the Azure Tenant ID and confirm the necessary permissions.

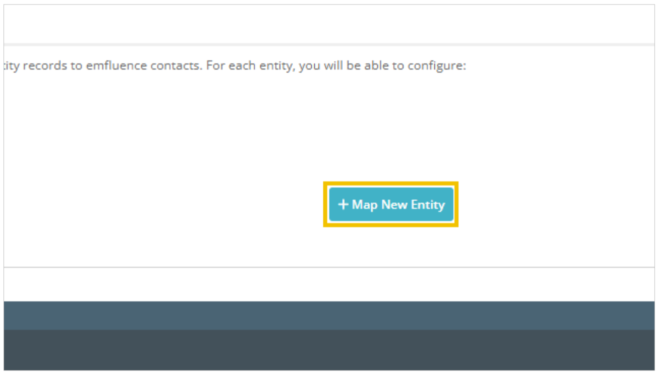
1. **Web API URL**: In Dynamics, go to Advanced Settings > Customizations > Developer Resources > Instance Web API > Service Root URL
2. **Azure Tenant ID**: In Azure, go to Azure Active Directory > Properties > Directory ID
3. **CONTINUE**: After connecting, consent must be given in Azure, an application user must be set up in Dynamics, and the environment must be saved.



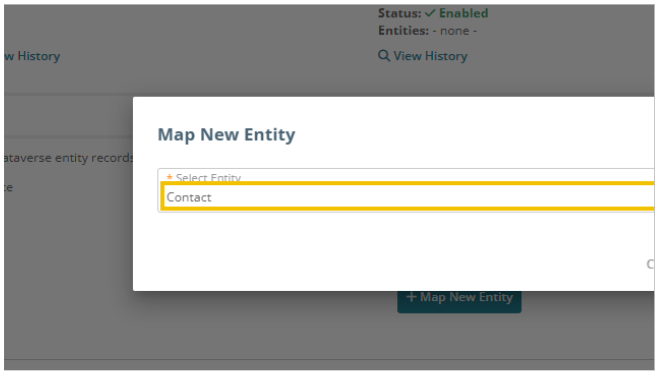
Now created, you will need to start connecting and mapping data in order for it to sync. Every entity, and the fields within each entity, will need to be mapped separately.



To start, click **Map New Entity** and choose the first entity you wish to map.

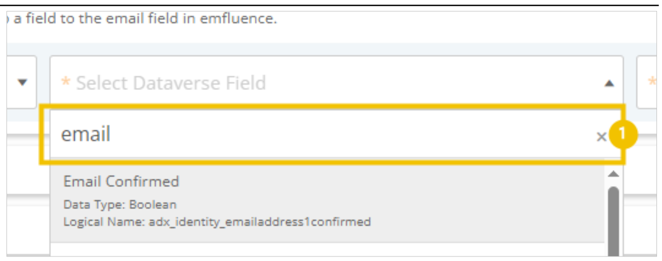


From the dropdown, choose the entity you wish to map. You may map more than one entity, but realize all records will become contacts in emfluence.

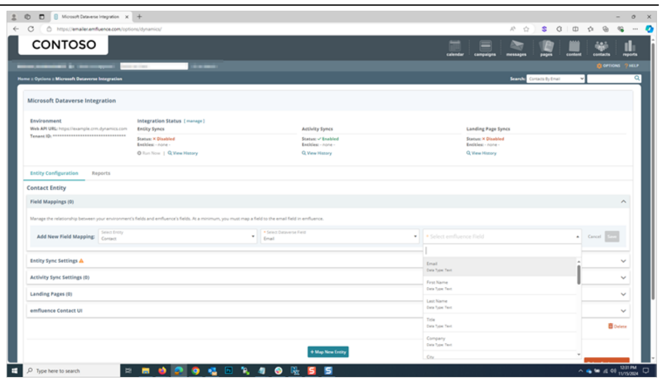


Begin mapping fields for your entity. To start, make sure you map email. We cannot connect a record without an email address so it must be one of the fields mapped for an entity. The first field will default the the primary entity you are mapping. In the second field, find and map the field on that entity you wish to pull in from Dynamics.

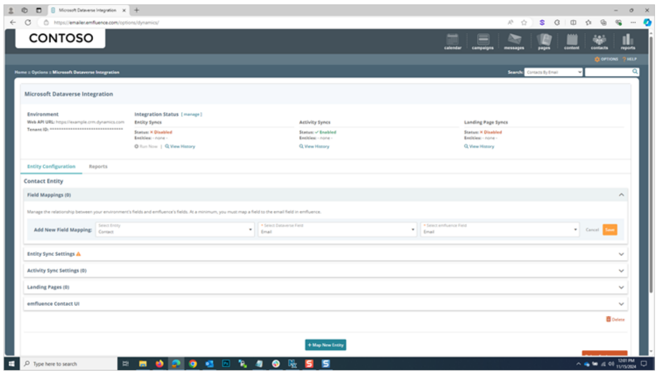
1. **email**: For many fields, Dynamics has several different values. Make sure you map the appropriate field you wish to map. For example, in most cases on Contacts, you would want "emailaddress1" for Email.



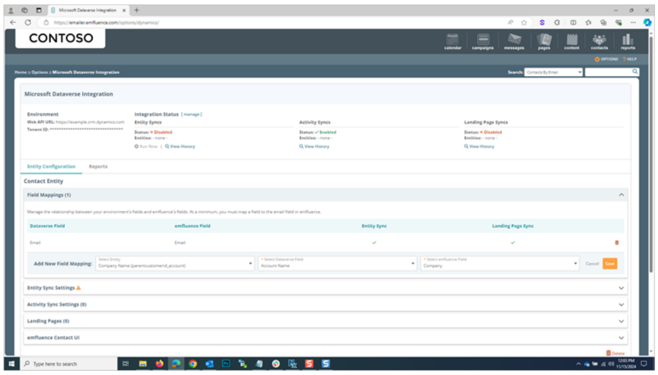
Finally, map the field in emfluence. If you are mapping to a custom field make sure you have created the field before starting the mapping process.



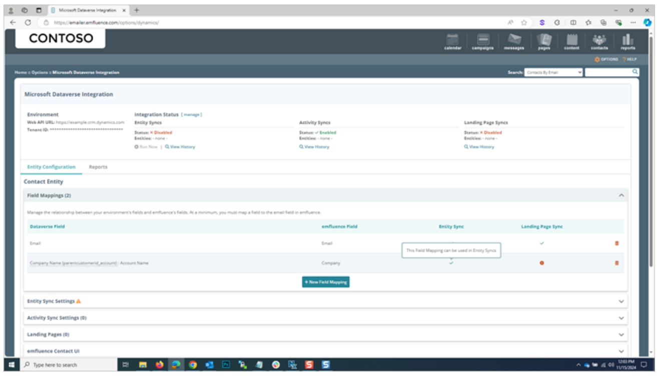
Save your field, and move on to your next mapping.



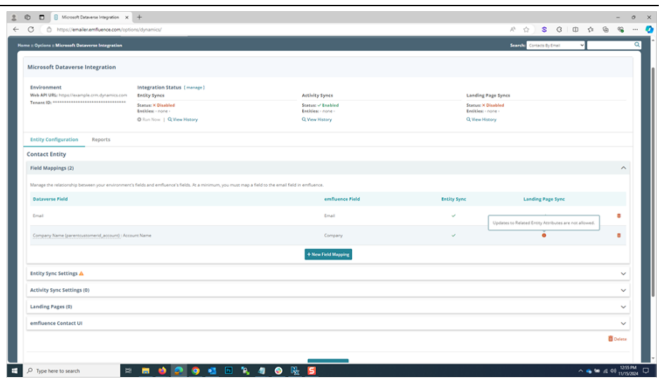
You may also choose to map related fields where available. The most common of these would be mapping Account Name to the Company field in emfluence. Select the related entity, and then the field, and then finally the emfluence field. NOTE: Some types of related fields, such as a lookup, may not be mapped.



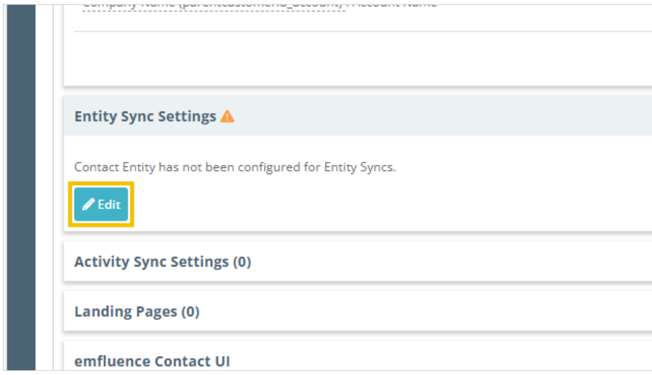
Once mapped you will see if data is allowed between that field to emfluence and whether or not data is allowed from emfluence to Dynamics. A checkmark means data can be connected in that direction. An exclamation means it cannot.



Hovering over any errors will provide a help tip with more information. NOTE: While primary entity fields sent over a landing page entry can be synced to Dynamics (which is the only way emfluence data will overwrite CRM data), related entities cannot be mapped back to Dynamics.

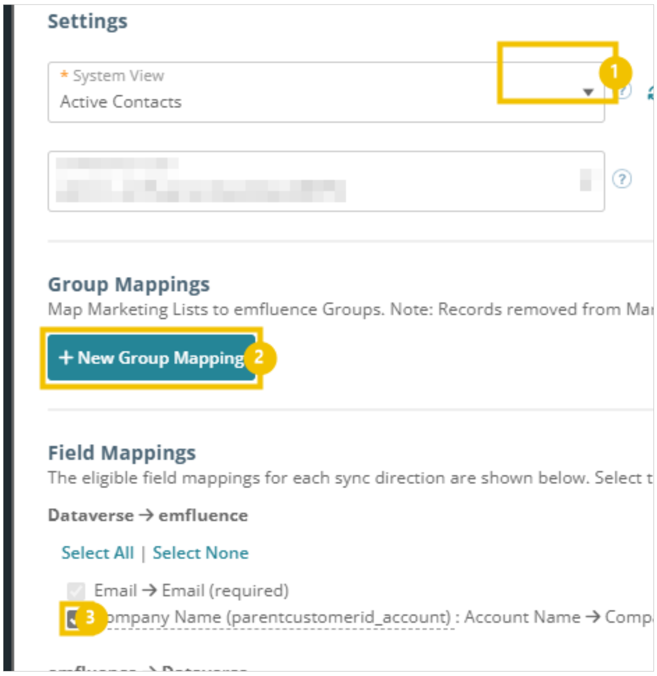


Once your fields are mapped, you then must set up your sync settings. To do so, click on **Edit**.

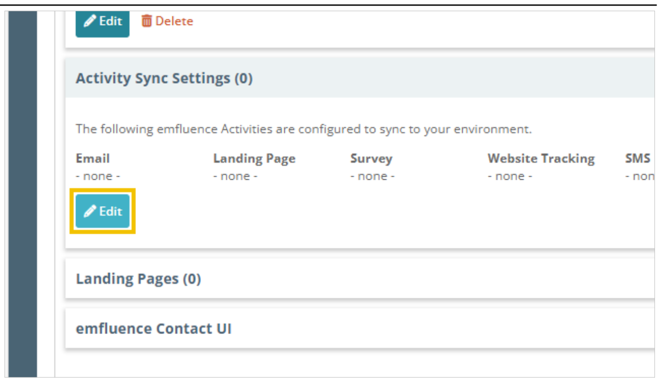


On this page you will set up your system view (which controls what entity records are allowed to sync), add your mappings to the sync, and optionally choose to map Marketing Lists to emfluence Groups.

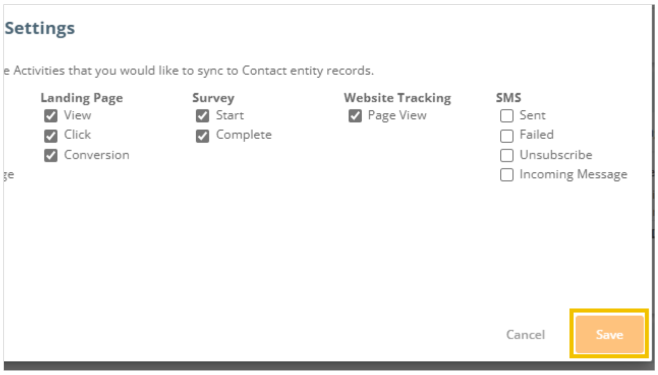
1. **System View**: A system view in Dynamics must be chosen to act as a filter to what records will get passed. Only records matching that view will be synced. We suggest only syncing records which include email addresses to limit errors.
2. **New Group Mapping**: You can choose to map a Marketing List in Dynamics (either static or dynamic) to a Static Group in emfluence. When someone is added to the list in Dynamics (as long as they match the system view) they will be added to the corresponding group in emfluence.
3. **Field Mappings**: Any fields mapped must still be added to the sync. Email will be added by default. For any additional fields, make sure to check the box to add it to the sync list. If you have mapped Held, Suppressed, or Contact Score, those will be found under emfluence to Dataverse and will need to be chosen as well.



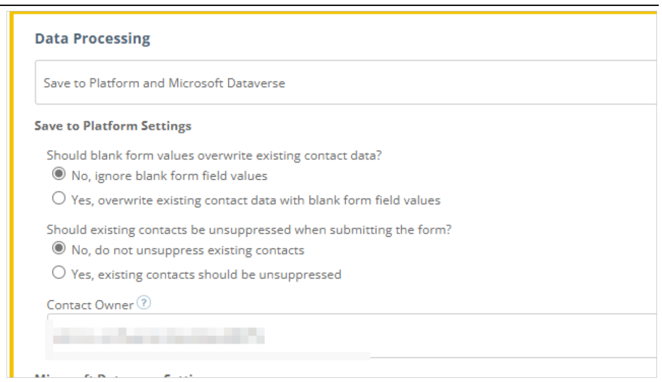
You may also choose to sync emfluence activity records (email views, clicks, etc.) into Dynamics. NOTE: Given the amount of data this will create in Dynamics, you may wish to discuss with your team what data you wish to sync prior to enabling this setting. To add activity syncs, click **Edit**.



Check the boxes for the activities you wish to sync and click **Save**.

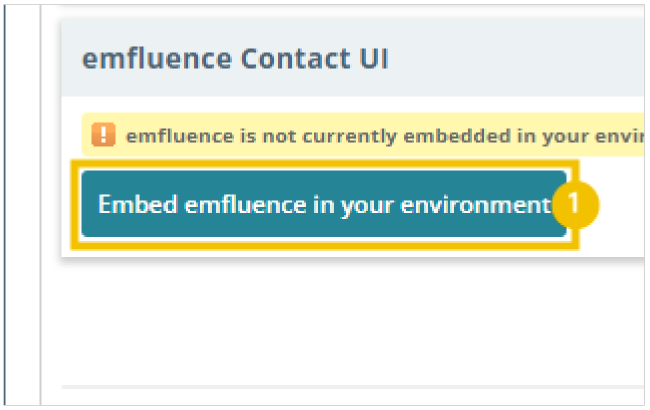


Any landing page and form where you want that data to be sent to Dynamics, needs to be set up to push that data on the landing page's Response Page. Set an entry to both **Save to Platform and Microsoft Dataverse** and then fill in the necessary options of how the data will get added.

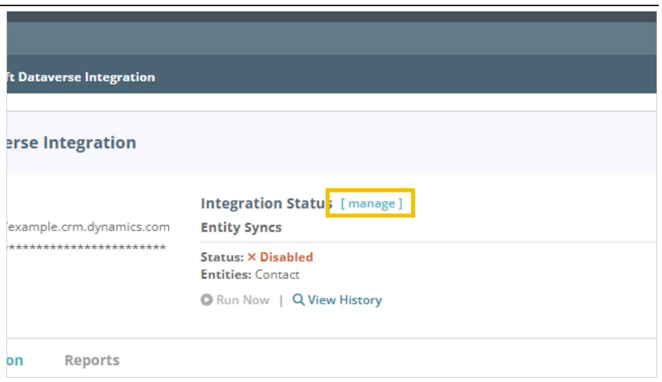


Landing Pages which are set to sync will be shown here. You can also select the setting to embed the emfluence contact UI in to Dynamics.

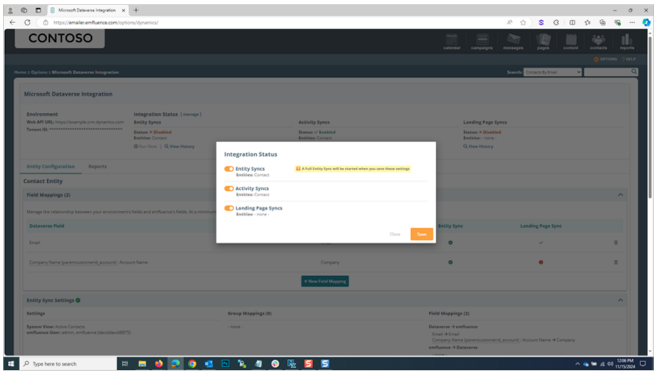
1. **Embed emfluence in your environment**: Click to embed the conact UI into Dynamics. This will only be visiable on entity records that a synced and only for users who are logged in to emfluence. Options for where ithe UI will be added will be provided.



Your sync, now set up, is still not running. To run the sync, click **manage** at the top of the page.

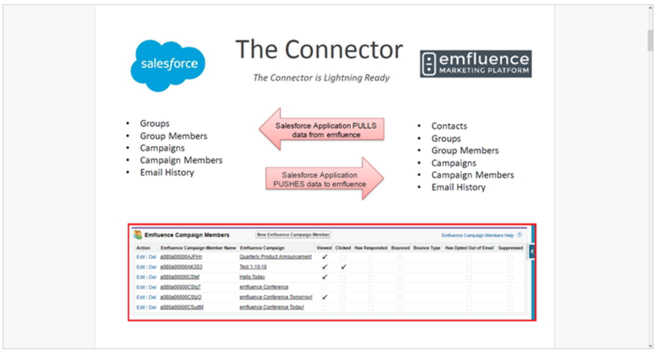


Here you can enable, or disable, your syncs. NOTE: Some changes to syncs will require you to temporarily disable the integration and then reenable afterwards. Reactivating a sync will cause a full sync to run.

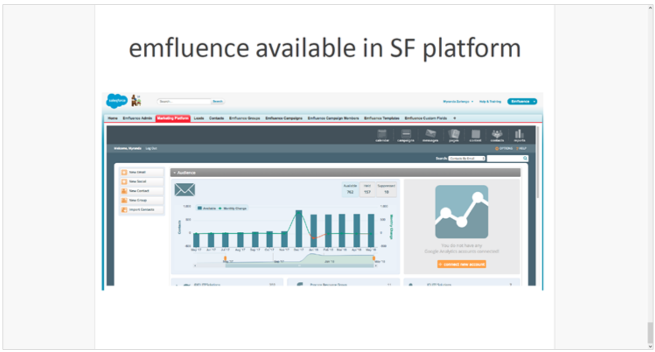


18.2.Salesforce

Created and maintained through ProCore, emfluence's Salesforce integration connects data from Salesforce to an emfluence account.

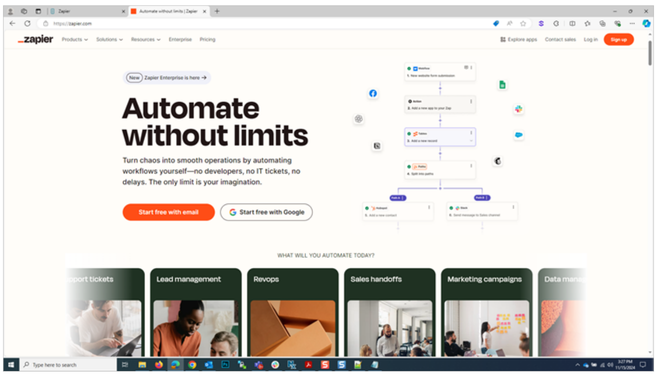


The Salesforce Connector creates an emfluence menu within the Salesforce instance for easy access. Data changes in Salesforce will update in real time where as data from emfluence will update to Salesforce overnight.

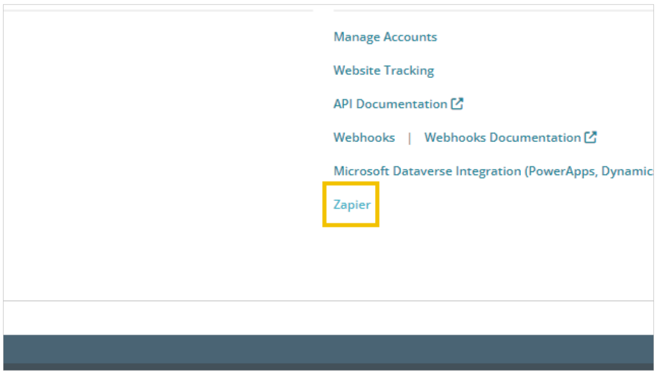


18.3.Zapier

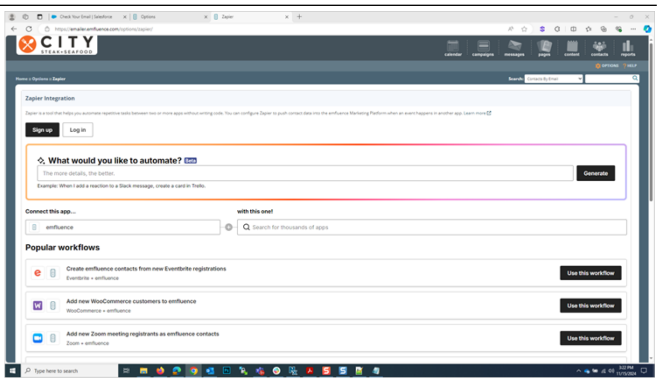
Zapier is a middleware connection software that allows you to connect two systems without the need to code the calls themselves. You can connect different apps to feed data into emfluence through the use of the emfluence Zap.



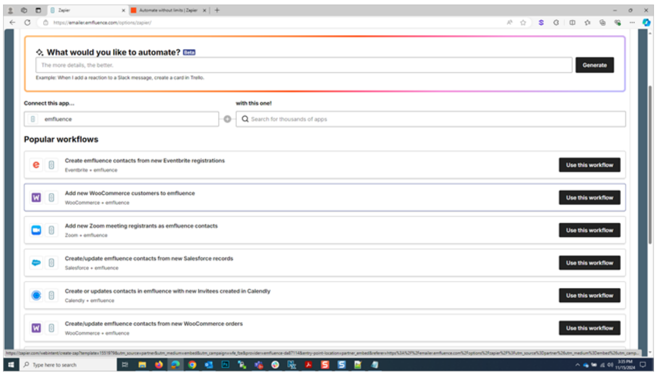
You can find the **Zapier** integration located within the Options menu. The settings allow you to connect and create your Zap without ever having to leave the emfluence Platform.



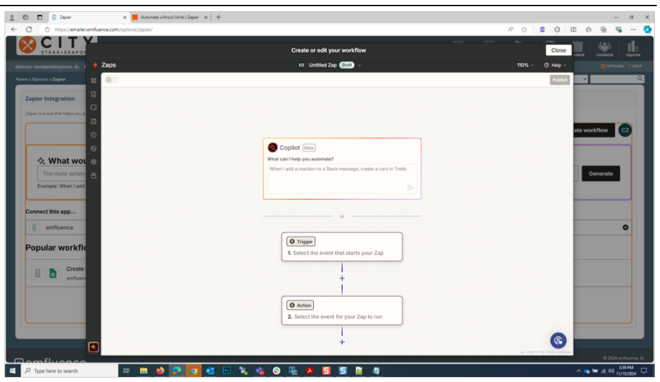
In order to use the Zapier integration you will need a Zapier account, an account with whatever third-party app you are attempting to connect, and an emfluence API Token.



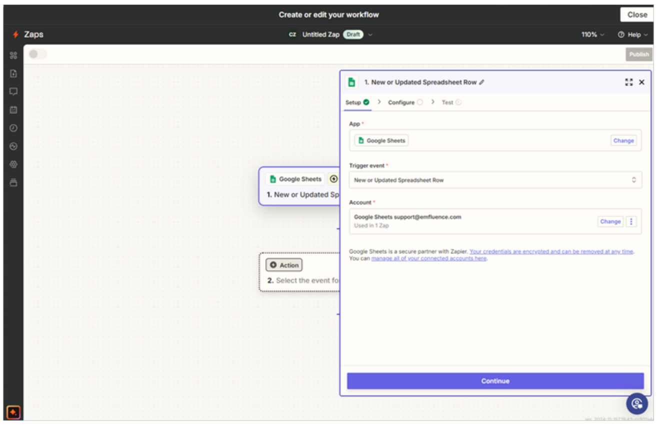
After logging in, you can use one of the premade Zaps to set up a connection or create your own connection by searching for available apps. Currently, emfluence's Zap will only receive data (it cannot be used to trigger data to another system).



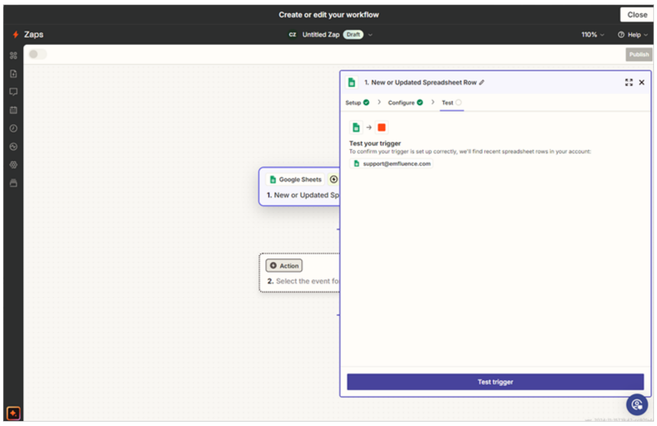
Use Zapier's walkthrough menus, which are the same if you would choose to make the Zap within Zapier, to select the trigger and action you would like to run.



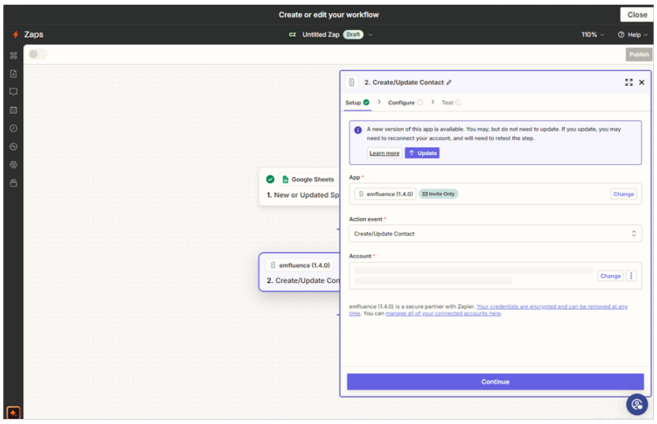
After choosing the app you wish to pass data from, choose the trigger event and confirm the account you are using to connect. Then continue.



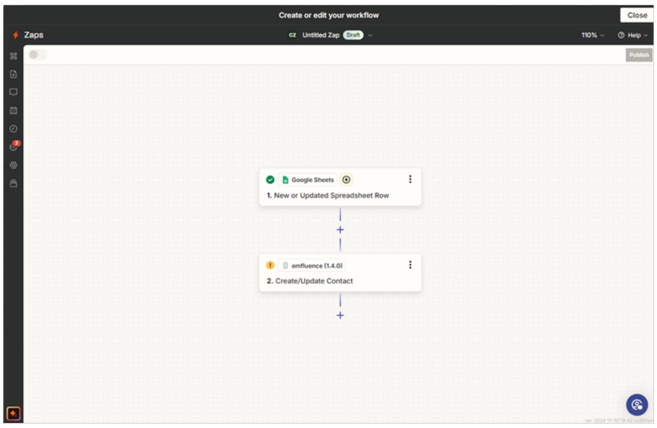
Zapier will allow you to test your trigger.



Connect to the emfluence app. Select the action to Create or Update Contact which will pass the data from your other system, through Zapier and add that infomation into your emfluence account. Confirm the account by pasting in your API token. NOTE: There may be more than one version of the emfluence Zap available depending on if new functionality has recently been added.

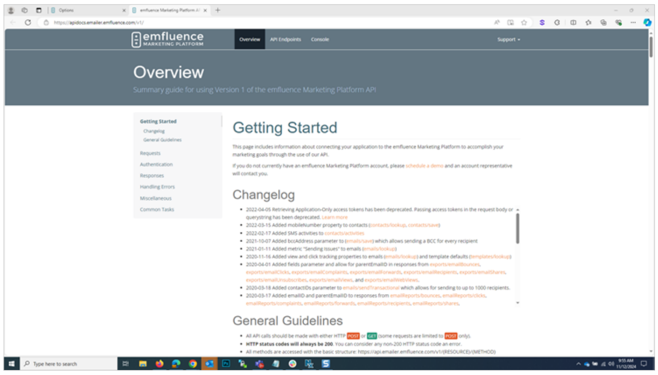


Complete the walkthrough and turn on your Zap.



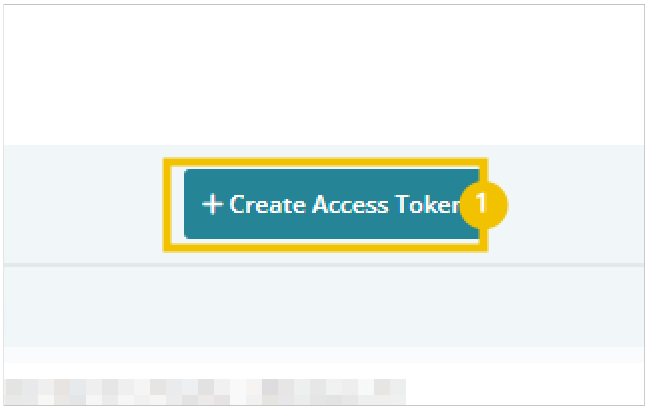
18.4.API

You can connect an outside system to emfluence through the use of emfluence's API. Using the API you can push data from your other system into emfluence or pull data out of emfluence.

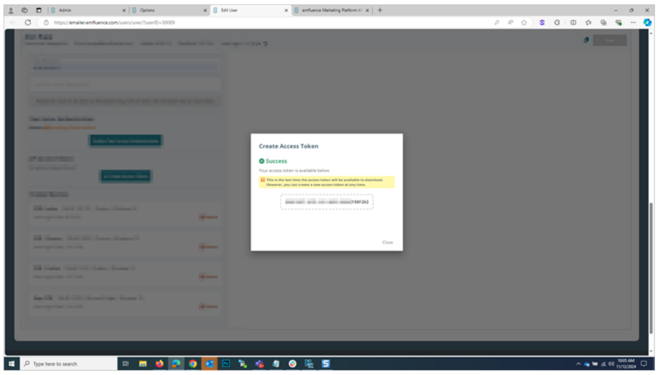


Access to the API is controlled through an API token. These are account specific, created on a client user in a specific account and saved on their record. The user's permissions control the access the token is given. emfluence usually suggests creating an API User to apply the token(s) to. NOTE: Reseller users can not create access tokens. Only client users in a specific account can create a token.

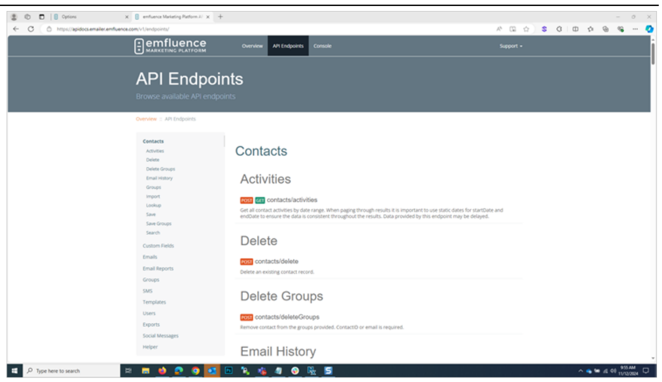
1. **Create Access Token**: You can create an access token. Permissions for the token are controlled by the user's permissions



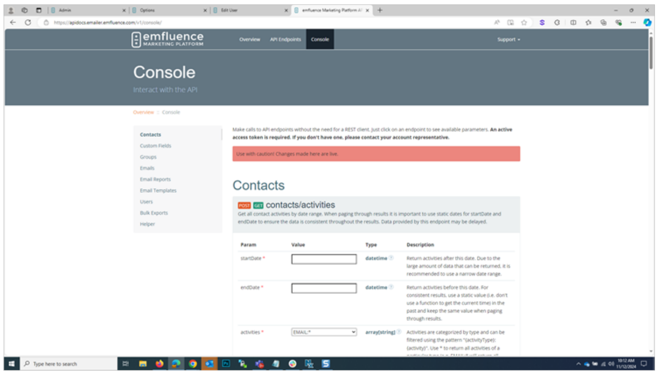
Give the token a title and optional description (emfluence suggests using specific tokens for specific actions to make it easier to diagnose if an issue arises). Make sure to grab the token as this is the ONLY time the full token will be shown in the platform and will be saved encrypted.



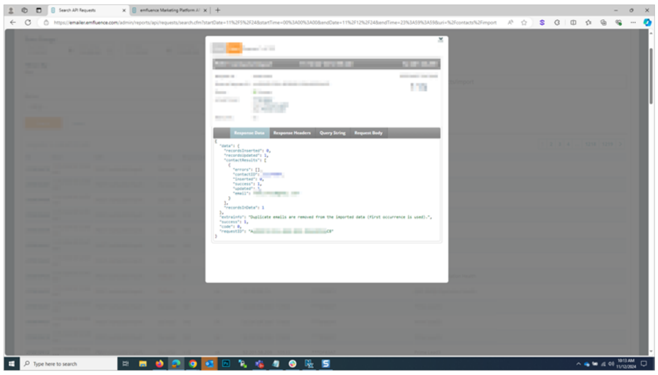
Calls made over the emfluence API can hit a variety of endpoints depending on what data you are trying to import into emfluence or export from emfluence. Make sure your calls match the rules and examples for each endpoint.



The emfluence API Console does allow you to test calls. Be careful in doing so as, if you are importing, you will be making live changes to data within your account.



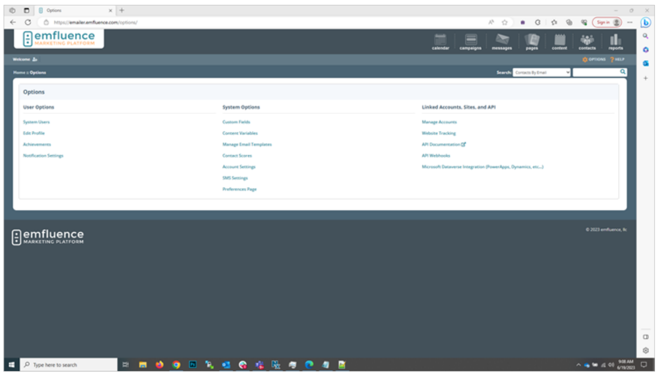
For every call made using the token, emfluence will return a response message. The message will include requestID (a unique identifier for debugging purposes) and either a succes or failure message. On failed calls, further information will be shown under Warnings and Errors.



19. Options

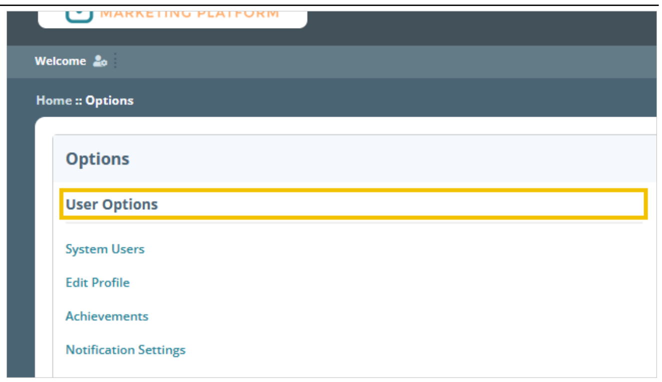
19.1. User Options

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.



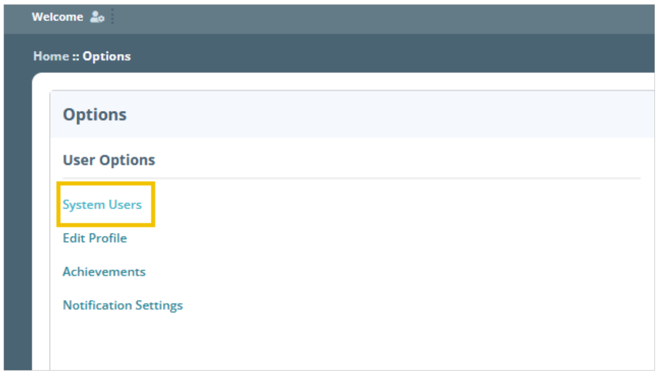
Under **User Options** you will find options to edit, add, or delete System Users, edit your own user's profile, examine your achievements within the platform, and change your notification settings.

NOTE: Some menus will require client admin level access.



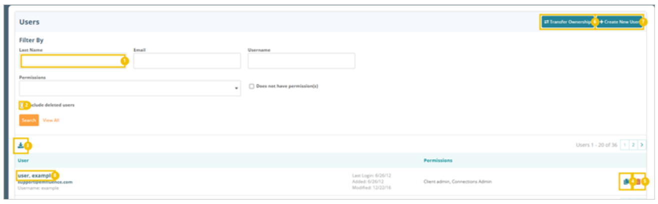
19.1.1. System Users

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



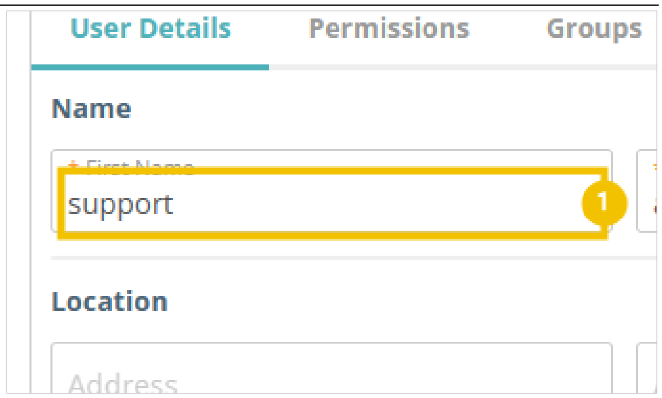
In System Users, client admins can search for, find, edit, create, or delete users in your account.

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.



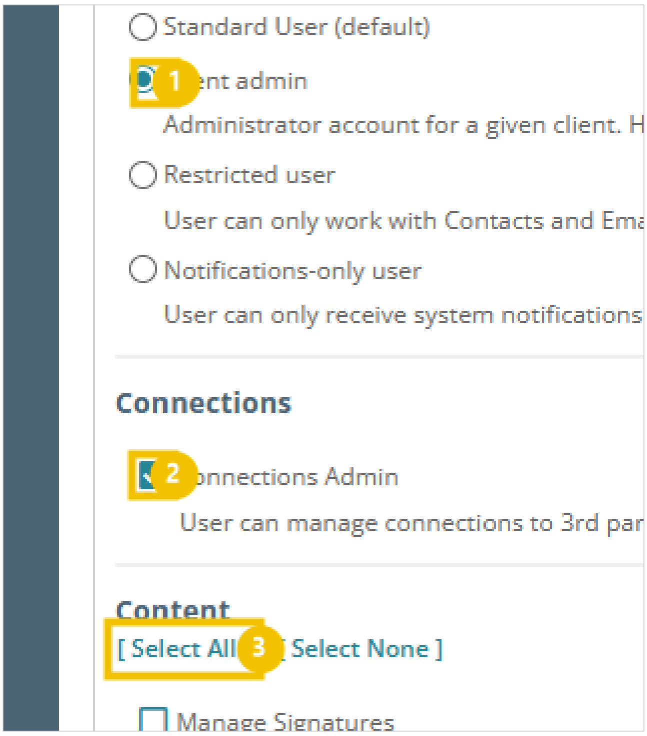
Under User Details you can edit information on the user's record. At the bottom of the page, the user can also edit their security settings such as altering their username or email, turning on/off two-factor authentication and trusted devices, and creating API access tokens. These security options are 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.



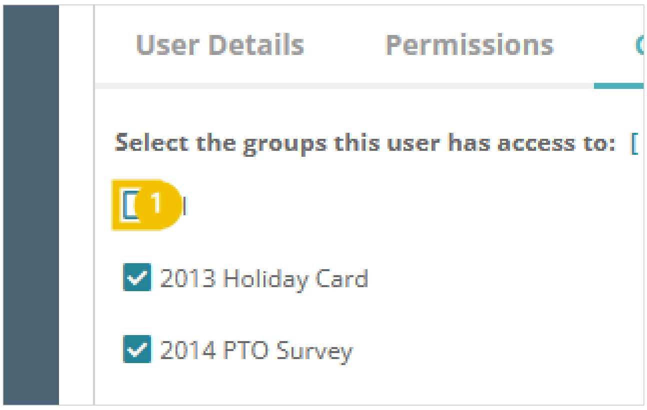
Under Permissions, you can edit the permissions of what the user has access to within the emfluence Marketing Platform.

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.



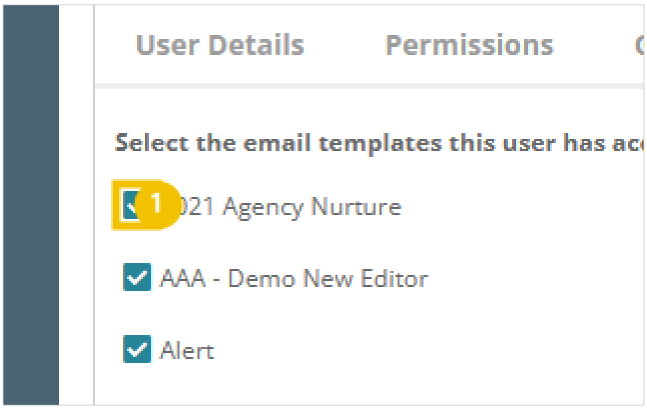
Under Groups, edit the Groups the user can see and access.

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.

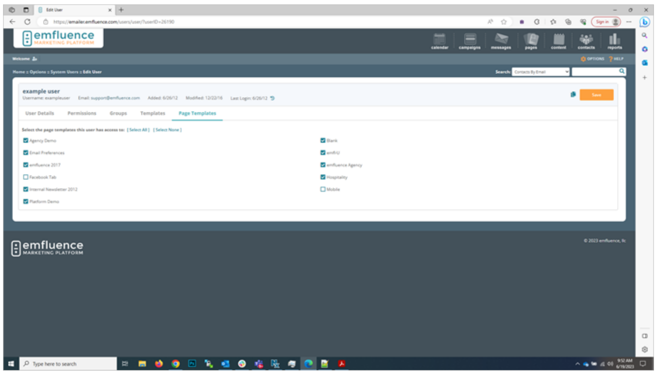


Under Templates, control which Email Templates the user has access to within the account.

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

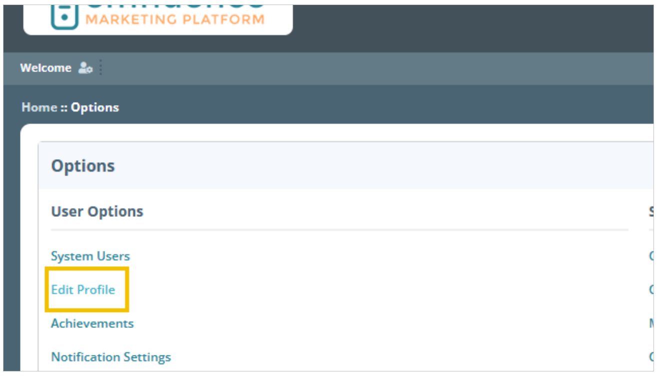


If your account includes any Page Templates, you can add access to them here. NOTE: Most newer accounts do not have page templates and use page themes instead.

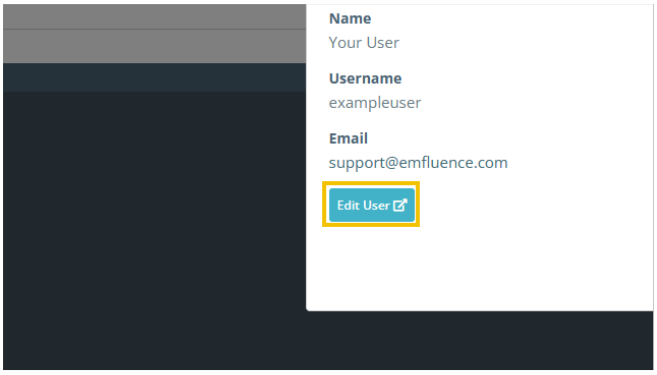


19.1.2. Edit Profile

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.

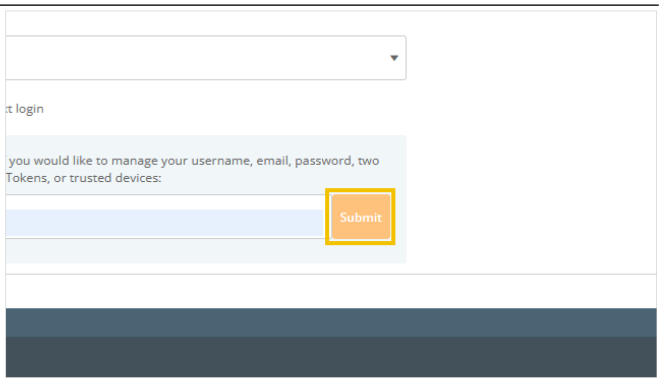


In the pop-up, click on the link **Edit User**

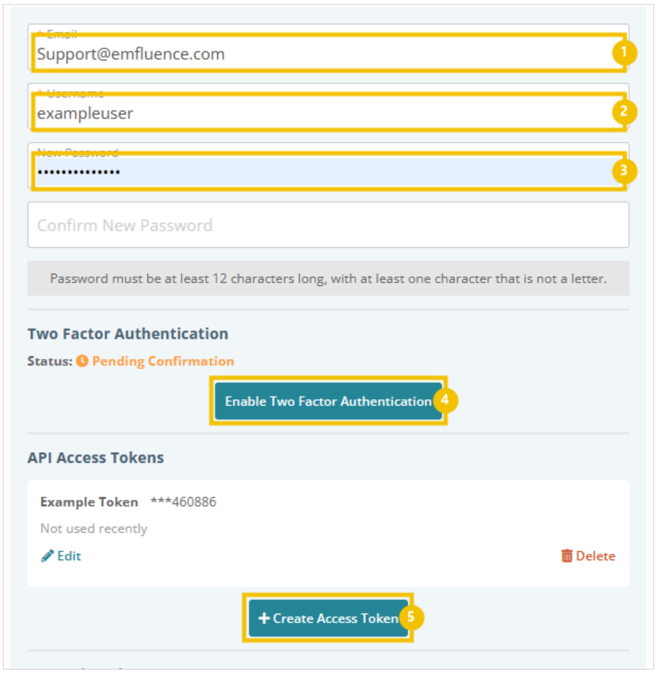


As when a Client Admin edits a user, you will see the user fields at the top of the page that can be edited. If you are also and admin, you will see and have access to Permissions, Templates, etc.

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.



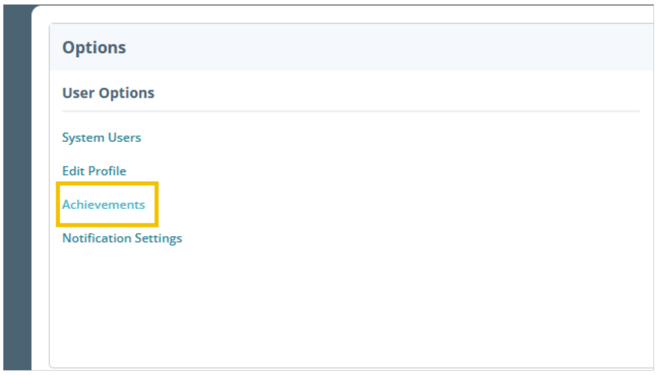
After unlocking the Security section you can edit your email, password, and username, turn on two-factor authentication, create access tokens, and see your trusted devices.



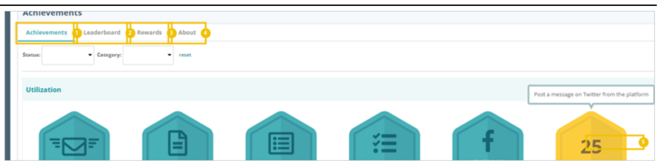
1. **Edit Email**: You can change the email associated with your login.
2. **Edit Username**: You can change the username associated with your login.
3. **Edit Password**: You can change the password associated with your login.
4. **Enable Two Factor Authentication**: You can enable two-factor authentication 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.

19.1.3. 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

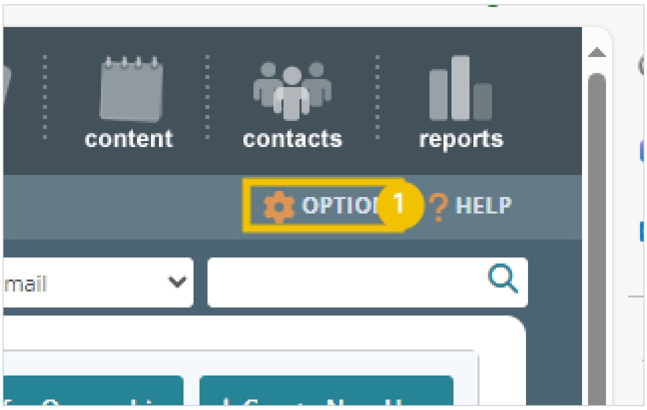


1. **Achievements**: See list of earned and available achievements.
2. **Leaderboard**: See the current leaderboard of achievements for emfluence users.
3. **Rewards**: Check out reward levels available when accumulating points on completed rewards.
4. **About**: Learn more about rewards.
5. **Point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

19.2. Create a User

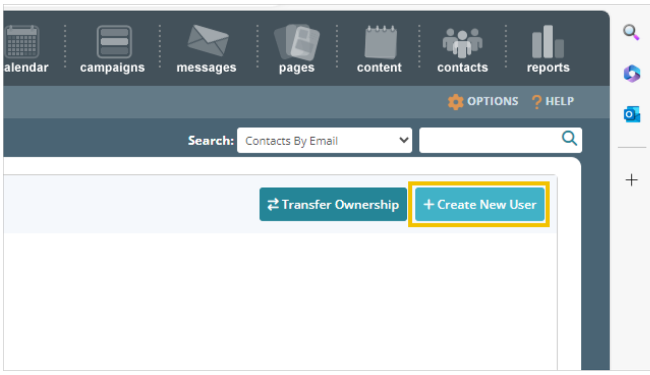
Client Admins can create new users and edit user permissions within the Options menu under System Users.

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

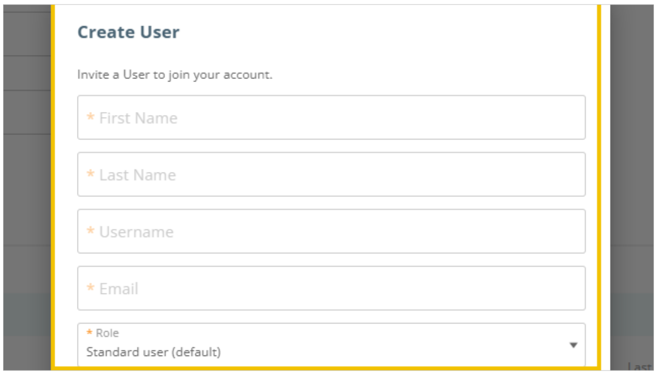


To create a new user, click on **Create New User** in the top right of the screen.

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.

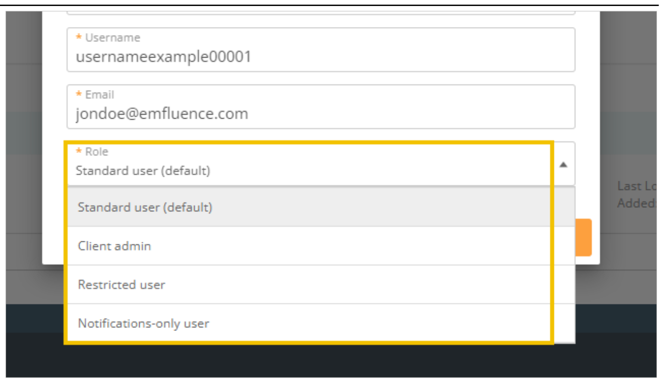


Fill out the required fields in the **Create User** modal. While multiple users can share the same email, usernames must be distinct across all emfluence platform accounts.

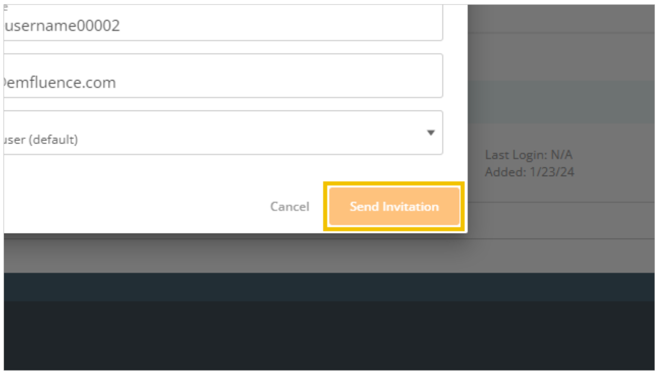


Choose the starting role for the new user.

- **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.

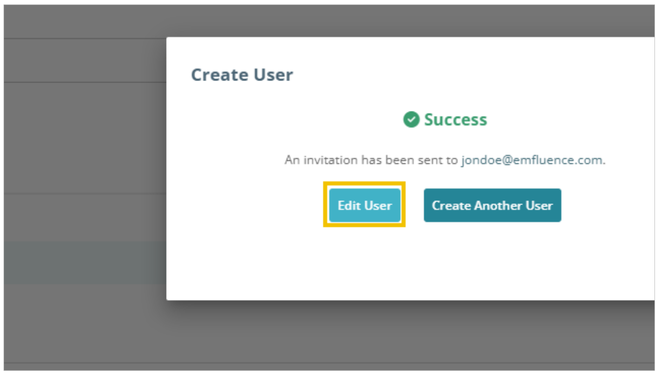


Next, click **Send Invitation** to create the user and trigger an email to the new user to set up their password. The invite will last about a day. If the invite expires, you can trigger another one by clicking the Invite icon next to their user in the list view.

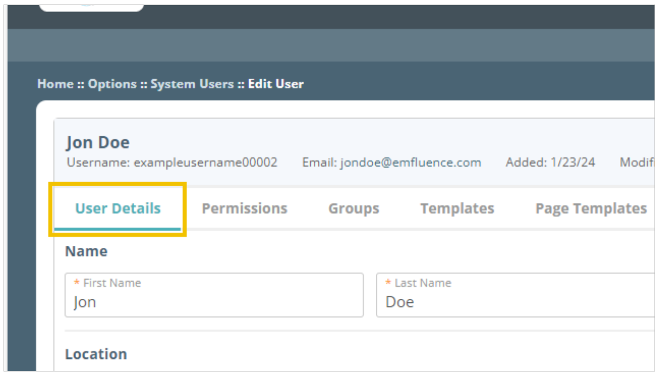


Next, you have the choice to close the modal, edit the user you have created, or create another user. If you choose to exit or create another user don't forget to return to this user to edit its permissions at some point.

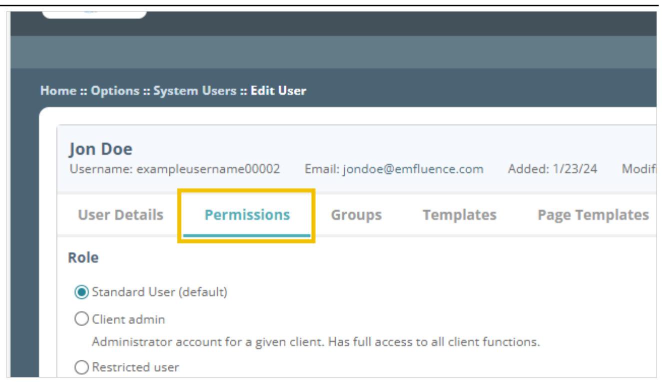
To edit permissions, click **Edit User**.



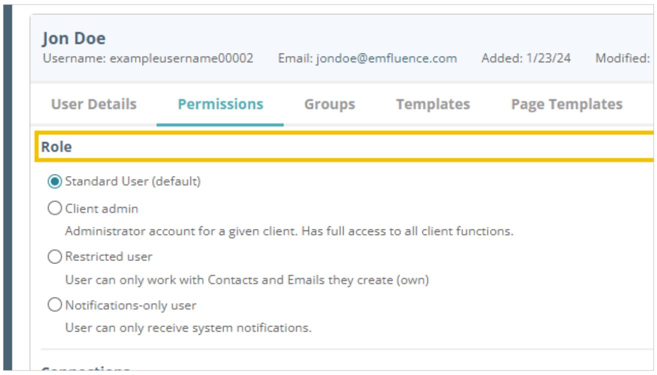
Here, you can edit the user through a series of tabs at the top of the screen. Under **User Details** you can update any personal information about the user. Each user will have access to their own User Details page as well.



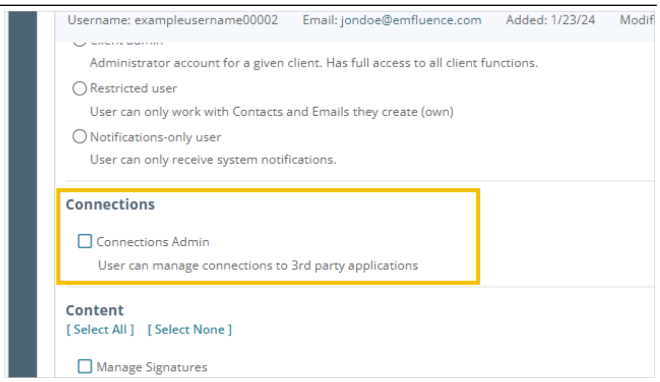
Under **Permissions** you can assign specific permissions to the user. By default, Client Admins get all permissions listed, but you can still check the boxes for individual permissions if you wish.



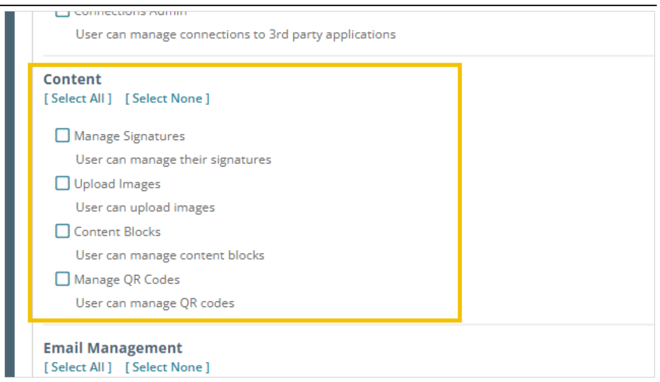
Under **Role** you can change the base permission of the user. NOTE: If you downgrade a client admin to a smaller role, their permissions will be drastically reduced as while they received access to groups, templates, etc. automatically when they were created they weren't explicitly given access to those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

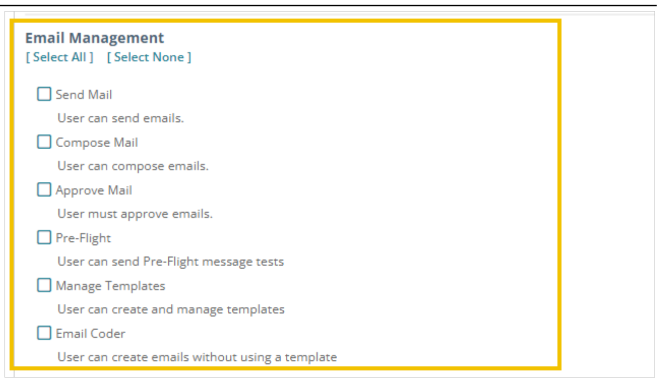


The **Content** permissions give access to specific sections of the platform under the Content menu. These include Content Blocks & Signatures, the ability to upload images and see images in the Upload Files menu, and manage QR Codes.

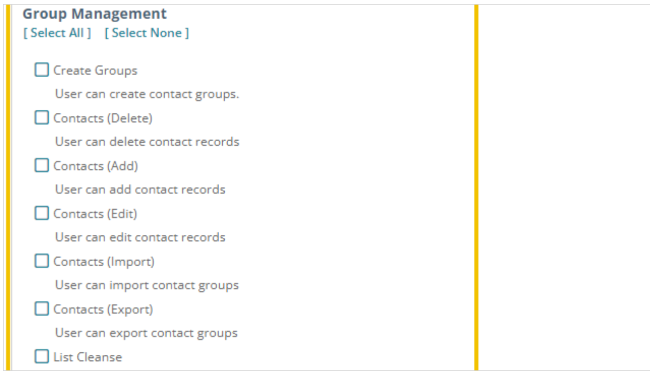


Under **Email Management** you can choose what permissions tied to email a user will receive including the ability to compose and send email, email approval, and access to pre-flight, template builder, and the paste-in-code option to create an email without a template.

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

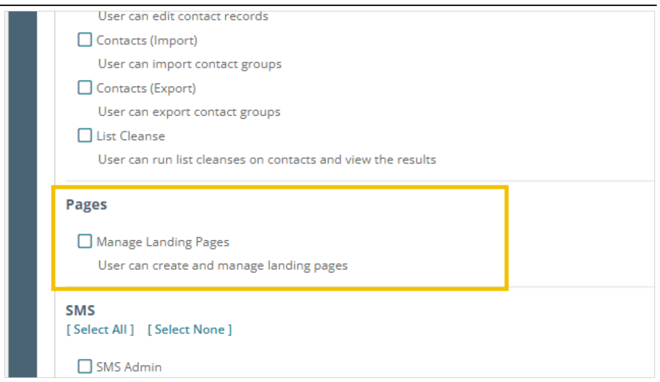


Under **Group Management** you can control what permissions the user has in relation to contacts and groups including creating groups, deleting groups, adding contacts, editing contacts, importing lists, exporting lists, and access to the list cleanse feature.



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

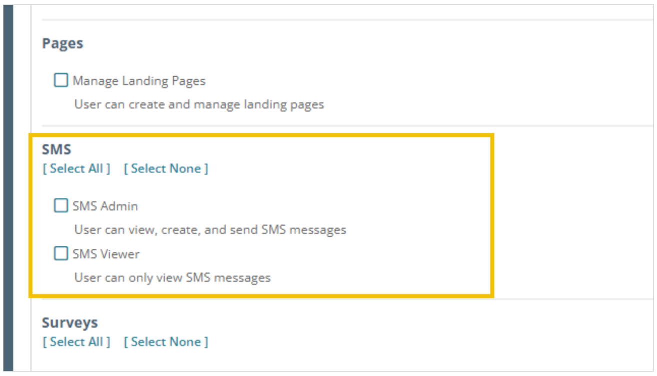
NOTE: If the user is not a client admin, and they need access to pages they did not create, access to those pages must be given to them individually.



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.

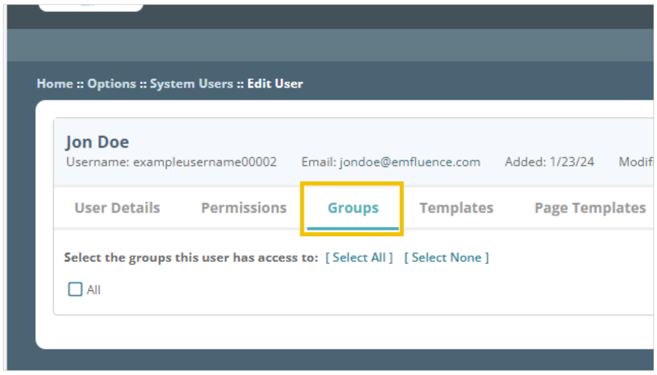


Under **Surveys** there are two permissions available.

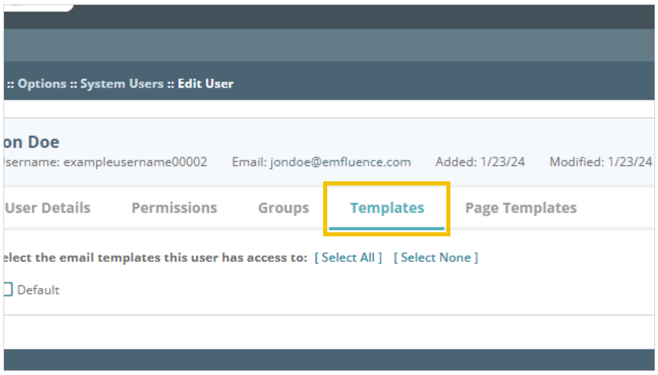
- **Survey Admins** can create and edit surveys
- **Survey Viewers** can see surveys for reporting purposes but can not create or edit a survey.

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.

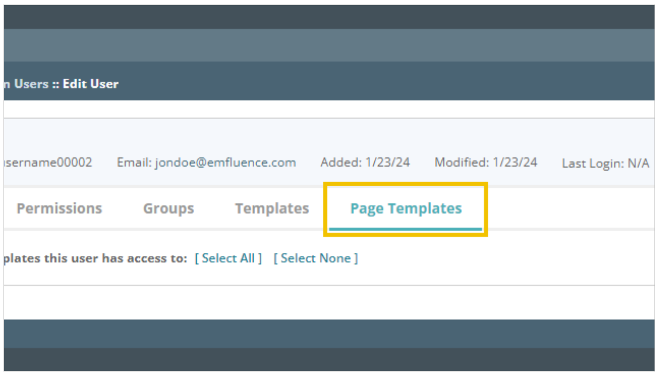


Under the **Templates** tab you can assign users specific templates. Users can only send emails using templates they have access to.



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

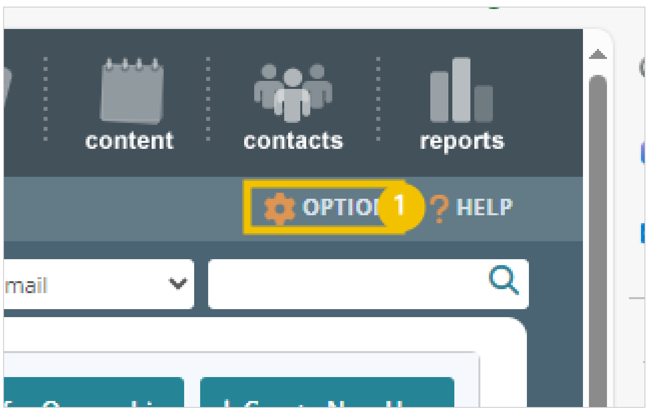
NOTE: As emfluence has moved to Page Themes rather than Page Templates, newer emfluence accounts are unlikely to see templates listed under this section.



19.3. User Permissions

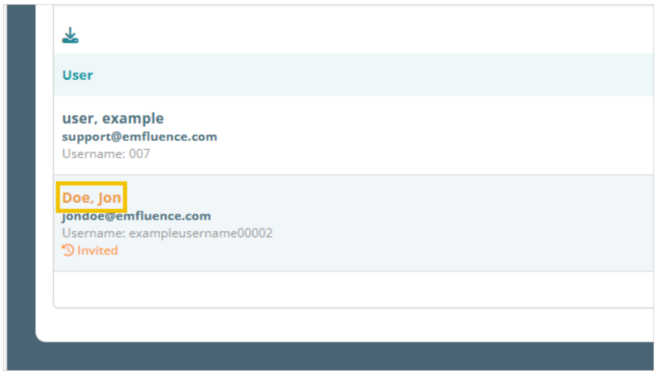
Client Admins have the ability to edit the permissions of users.

1. **OPTIONS**: To edit a user, click into the Options menu and click on System Users.

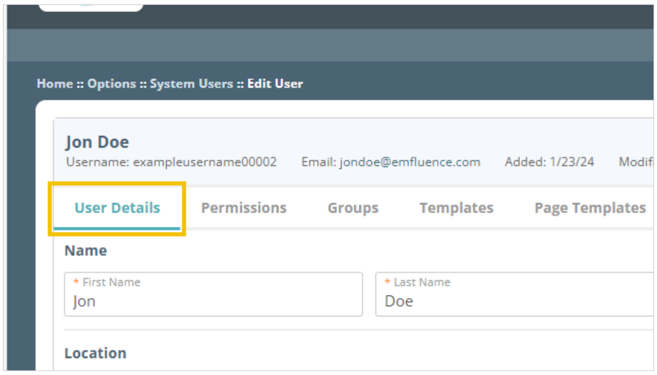


To edit an individual user, click on the user's name.

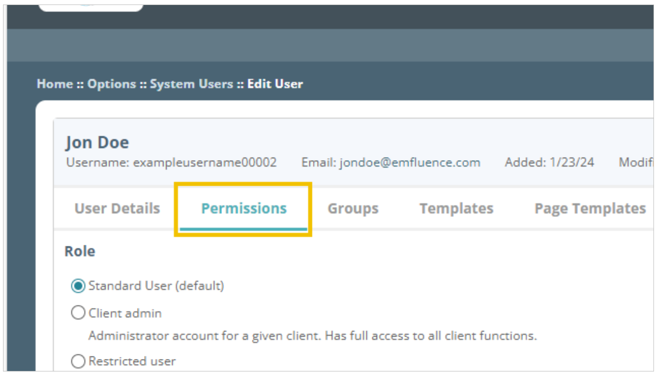
NOTE: Editing permissions can affect what the user owns within the platform. For example, if you remove the Send Email permission from a user any automated emails owned by that user would fail to send. Permission changes can also affect API Tokens tied to that user. Be careful when editing permissions for existing users.



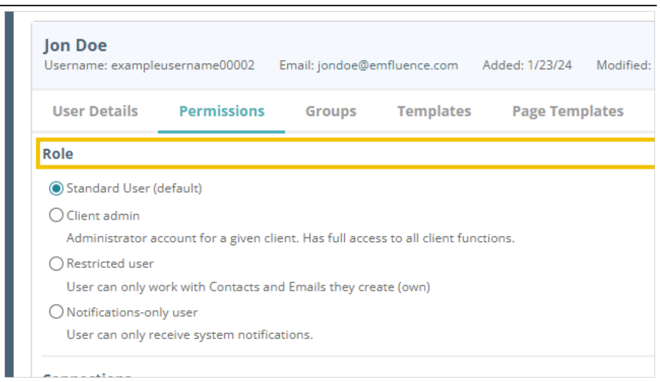
Here, you can edit the user through a series of tabs at the top of the screen. Under **User Details** you can update any personal information about the user. Each user will have access to their own User Details page as well.



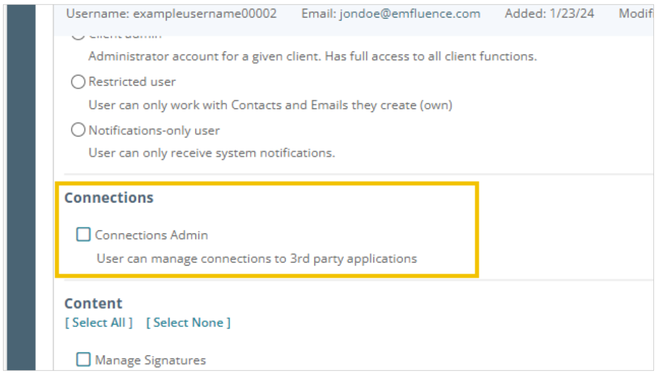
Under **Permissions** you can assign specific permissions to the user. By default, Client Admins get all permissions listed, but you can still check the boxes for individual permissions if you wish.



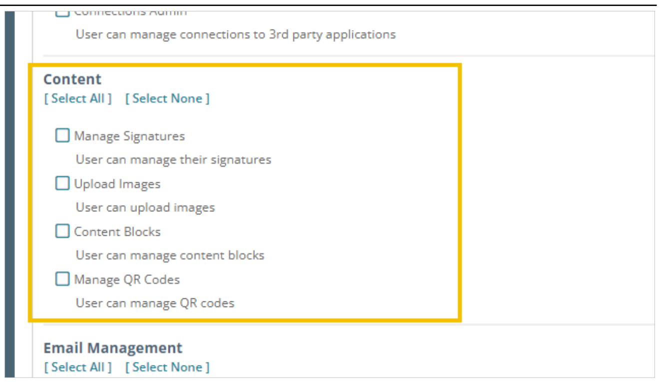
Under **Role** you can change the base permission of the user. NOTE: If you downgrade a client admin to a smaller role, their permissions will be drastically reduced as while they received access to groups, templates, etc. automatically when they were created they weren't explicitly given access to those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

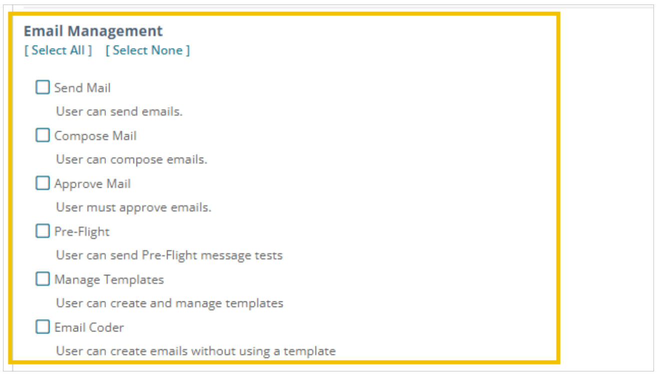


The **Content** permissions give access to specific sections of the platform under the Content menu. These include Content Blocks & Signatures, the ability to upload images and see images in the Upload Files menu, and manage QR Codes.

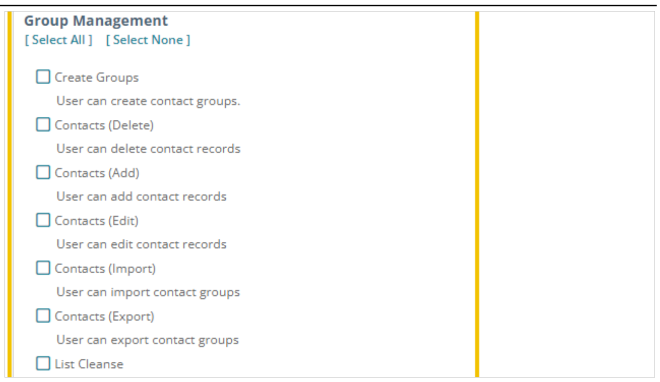


Under **Email Management** you can choose what permissions tied to email a user will receive including the ability to compose and send email, email approval, and access to pre-flight, template builder, and the paste-in-code option to create an email without a template.

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

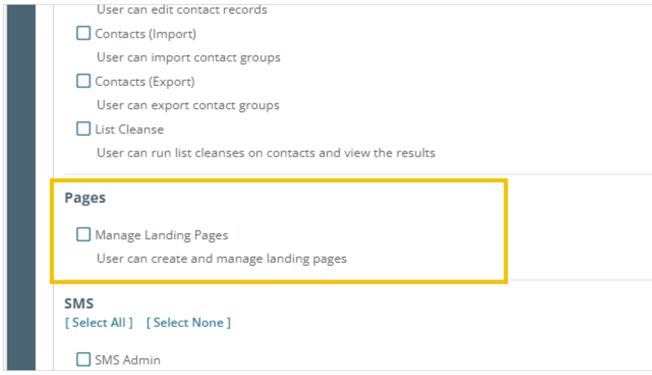


Under **Group Management** you can control what permissions the user has in relation to contacts and groups including creating groups, deleting groups, adding contacts, editing contacts, importing lists, exporting lists, and access to the list cleanse feature.



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

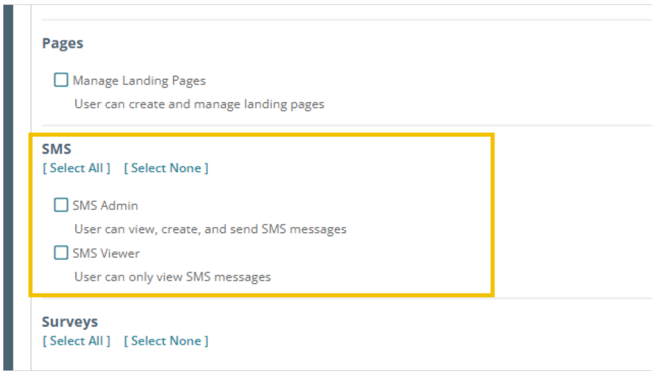
NOTE: If the user is not a client admin, and they need access to pages they did not create, access to those pages must be given to them individually.



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.

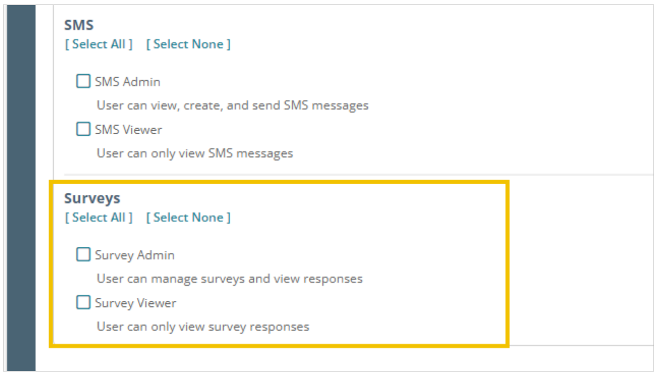
NOTE: SMS must be enabled in your account for these permissions to apply.



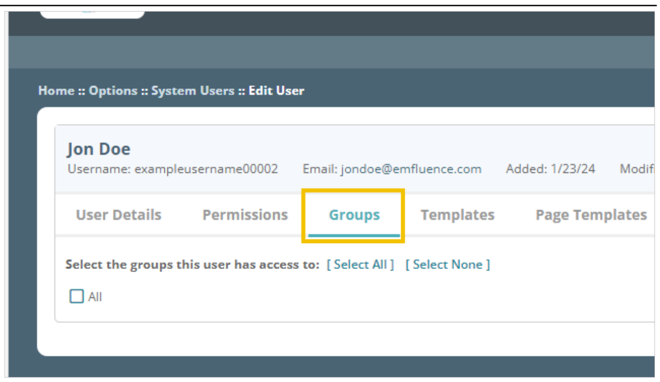
Under **Surveys** there are two permissions available.

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

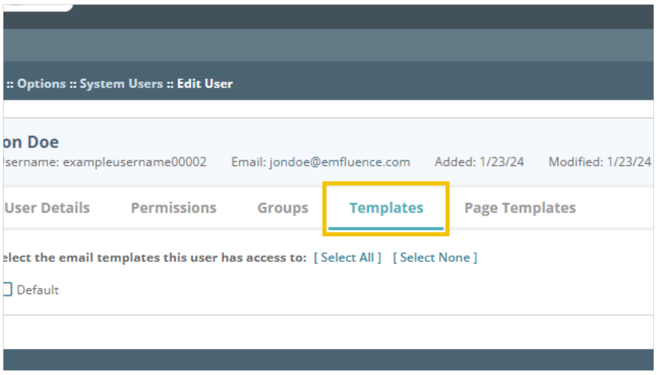
NOTE: As with landing pages, users who are not client admins will need to be given access to individual surveys for them to have access to those surveys.



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

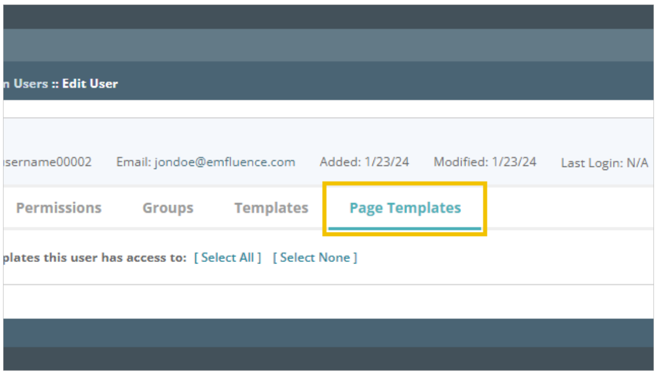


Under the **Templates** tab you can assign users specific templates. Users can only send emails using templates they have access to.



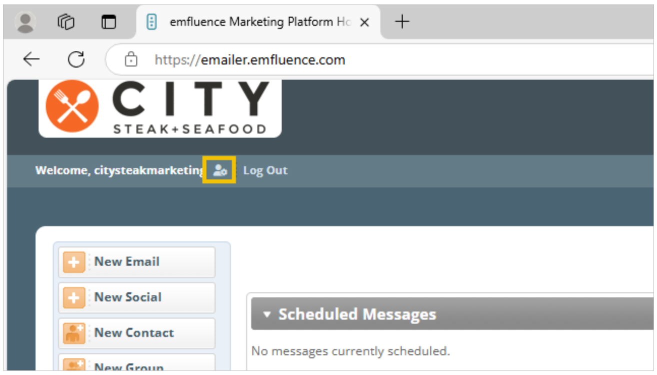
Under **Page Templates** you can assign any page templates to this user.

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

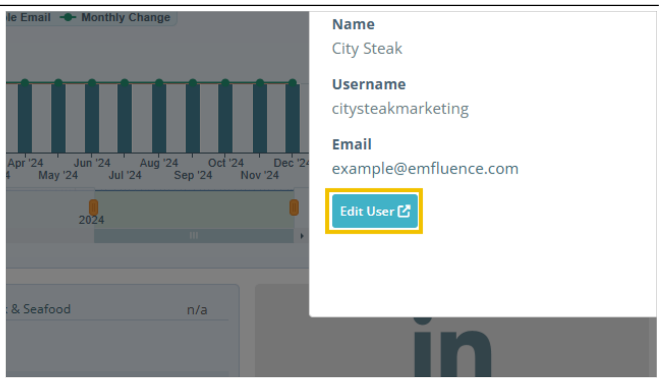


19.4. User Profile & Security Options

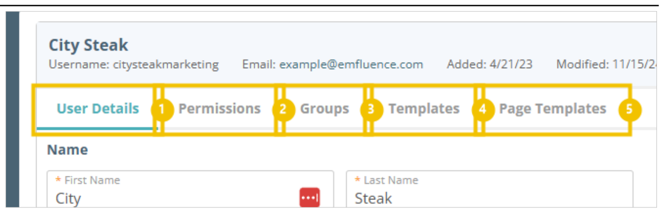
To edit your user profile, click on the icon next to your username at the top of the page.



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



The User Record shows the data, permissions, and access saved for the user.



1. **User Details**: This tab allows you to edit the basic information of your user including name, location, and contact information.
2. **Permissions**: Permissions allows you to change the permissions of the user you are

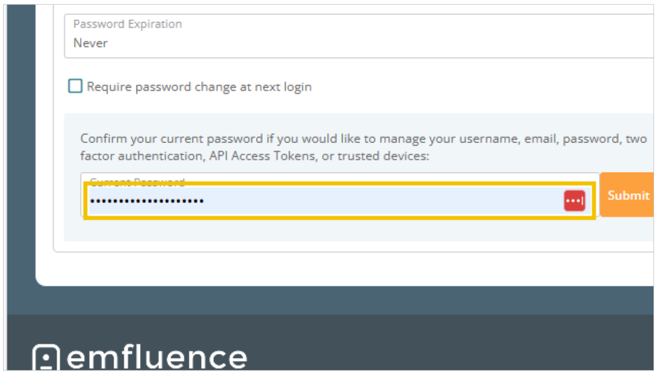
viewing. Only Client Admins have access to this tab.

3. **Groups**: Groups allows you to add/remove access to groups within the account. Only Client Admins have access to this tab.
4. **Templates**: Templates allows you to give a user access to specific email templates within an account. Only Client Admins have access to this tab.
5. **Page Templates**: Page Templates allows you to assign legacy page templates (mostly phased out by the the addition of Page Themes) to a user within an account. Only Client Admins have access to this tab.

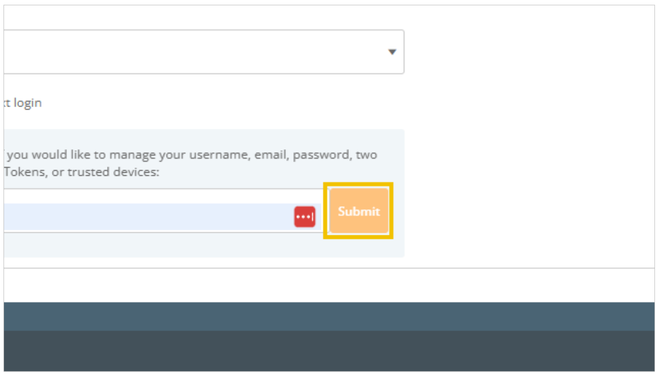
19.4.1. Security

At the bottom of the User Details tab, you can unlock the Security section which allows you to make changes to your user's email address, password, add two-factor authentication, see and edit trusted devices, and create API tokens.

NOTE: The user's security section is available only to that user. No one else can access or edit this information for them. Reseller user security is controlled in the reseller portal.

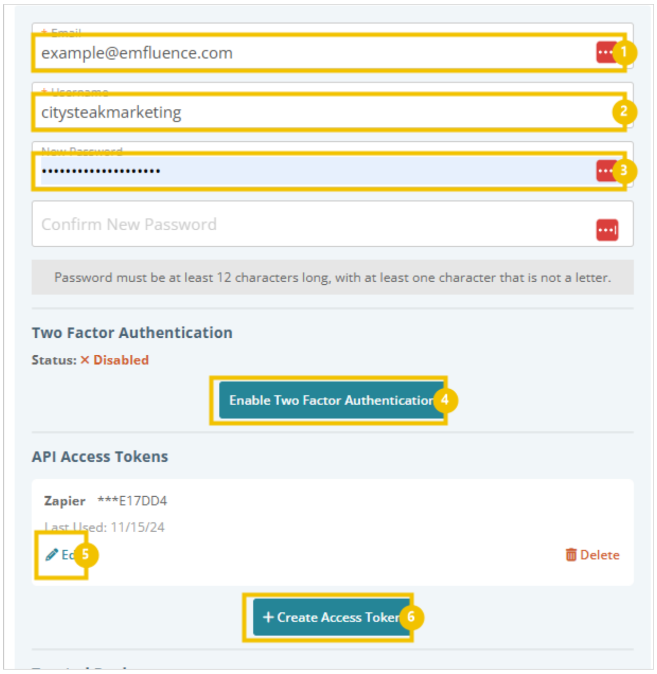


To access the Security section, confirm your password and click **Submit**.



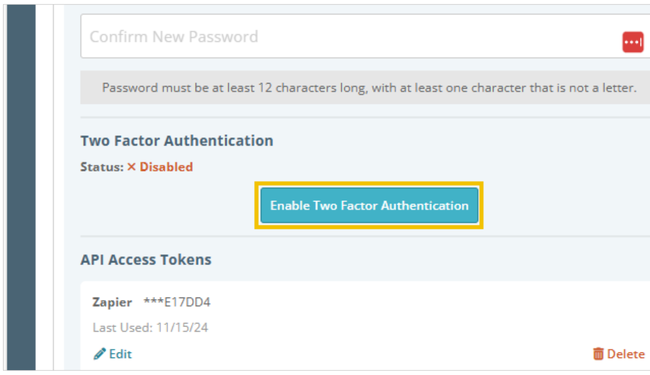
Now unlocked, you are able to edit the information in the Security section.

1. **Email**: Change the user's email address.
2. **Username**: Change the user's username.
3. **Set Password**: Set and confirm a new password.
4. **Enable Two Factor Authentication**: Enable Two Factor Authentication
5. **API Access Tokens**: View and edit any current access tokens.
6. **Create Access Token**:

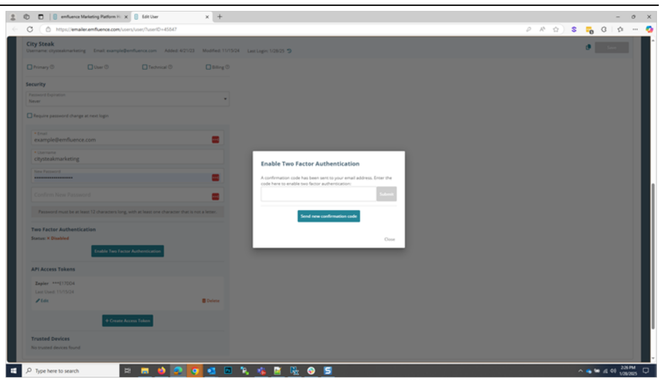


19.4.2. Two Factor Authentication

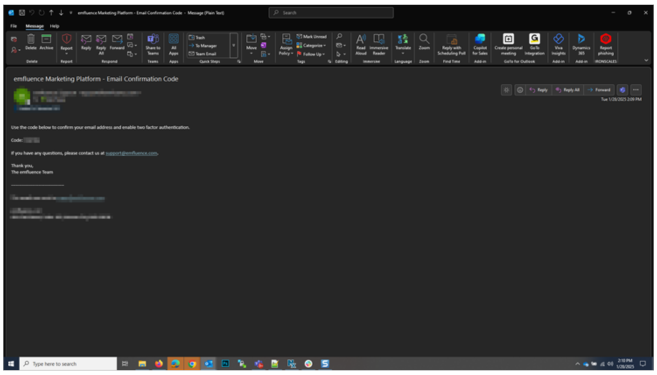
To set up two factor authentication, click the button **Enable Two Factor Authentication**



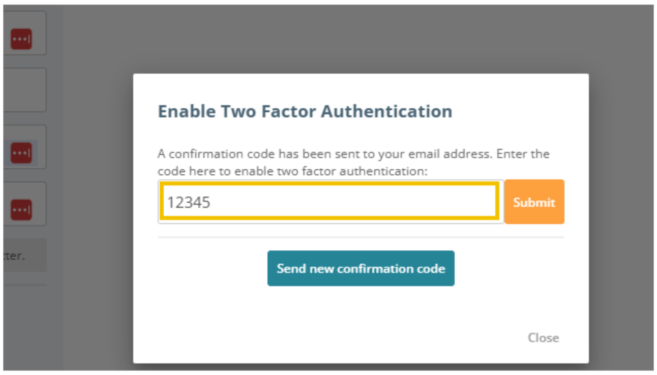
A confirmation code will be sent to the email address on file for your user.



In your inbox, find the email and copy the code.



Copy the code from the email and click **Submit**.

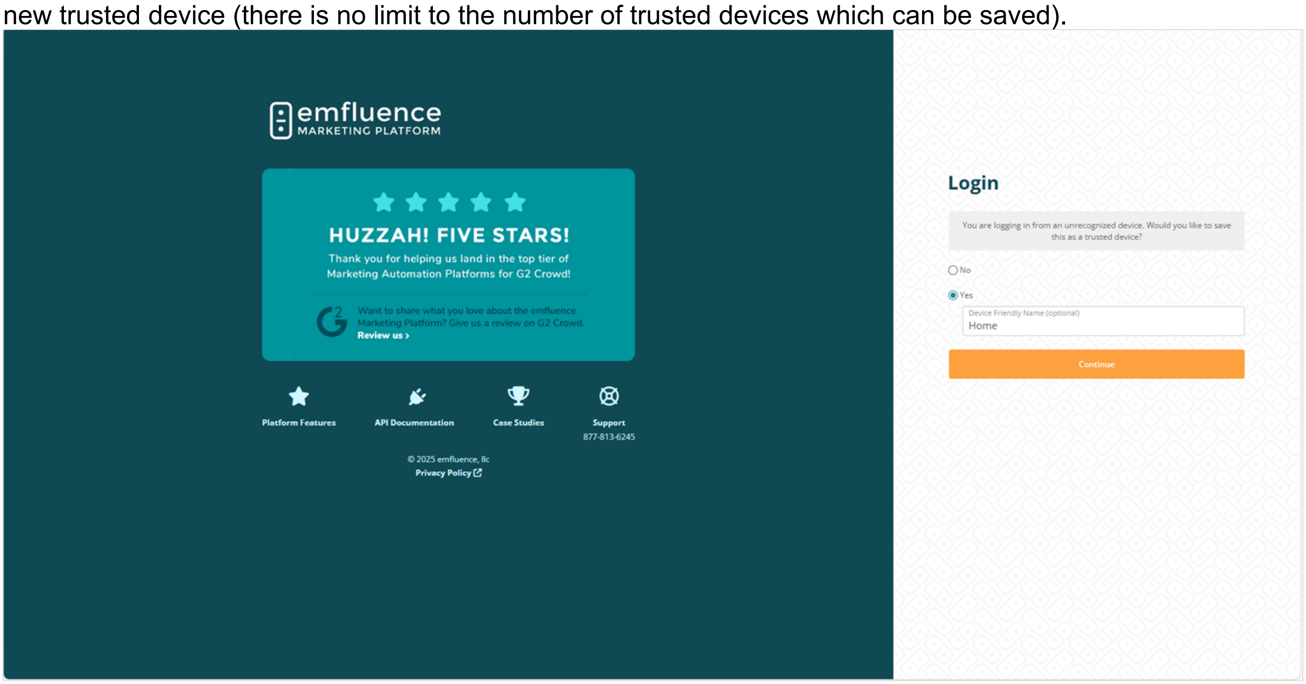


Every time you log in from an untrusted device you will receive an email and be forced to enter the code provided. To prevent having to put the code in on every single login, you can save trusted devices.

With trusted devices saved for your user, you will only need to complete two-factor when logging in from an untrusted device or if the last two-factor sign-in for your user was more than 30 days ago.

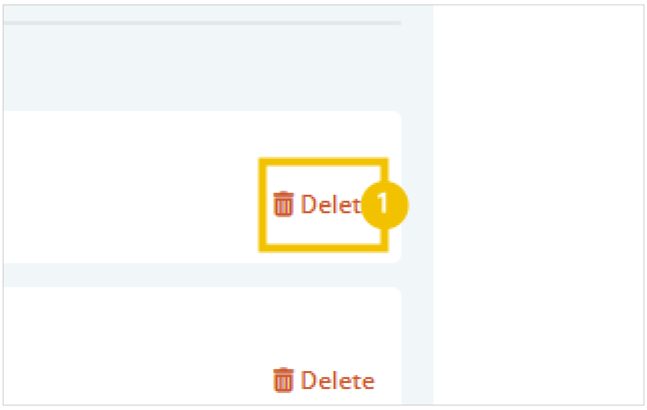
19.4.3. Trusted Devices

Every time you log in from an unrecognized device or location, you will be prompted to save that as a trusted device with a friendly name. A trusted device is a combination of IP address, browser, and computer operating system. If any, or all, of those are different than a previously saved device, you will be prompted to save as a new trusted device (there is no limit to the number of trusted devices which can be saved).



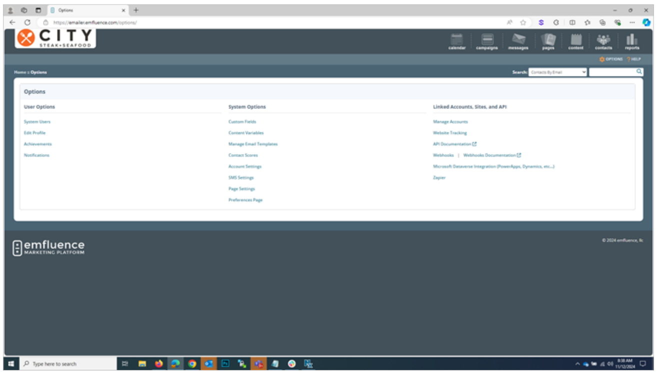
Your list of trusted devices can be seen in the unlocked Security section. If you see devices that don't appear to be yours, you should take steps to immeadiately change your password.

1. **Delete**: If there is a device you no longer need (a one-time coffee shop visit, a location used on vacation, etc.) you may choose to remove that device from your list. To remove a trusted device, click on the delete icon to the right of that device.

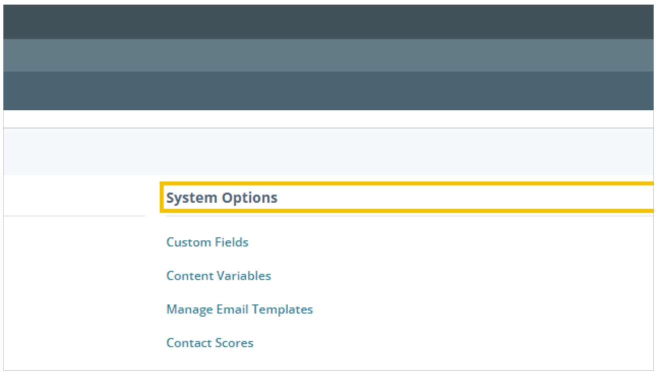


19.5.System Options

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.

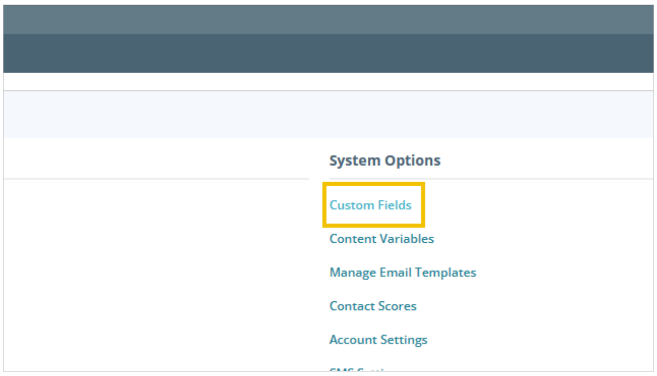


Under System Options, you can access Custom Fields, Content Variables, Email Templates, Contact Scores, Account Settings, SMS Settings, Page Settings, and the Preferences Page.



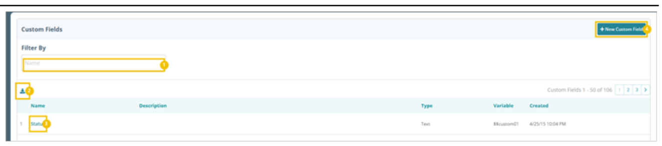
19.5.1. Custom Fields

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

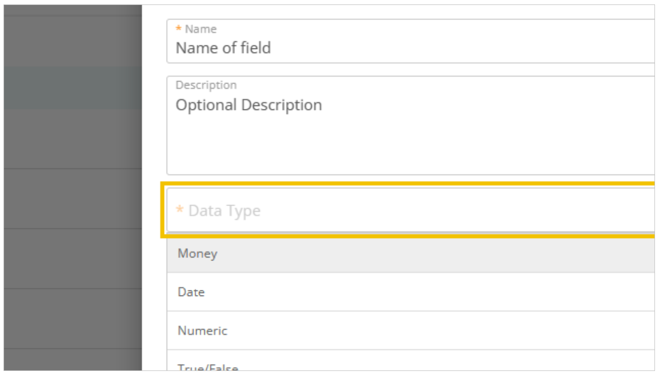


the specific field you are looking for.

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.

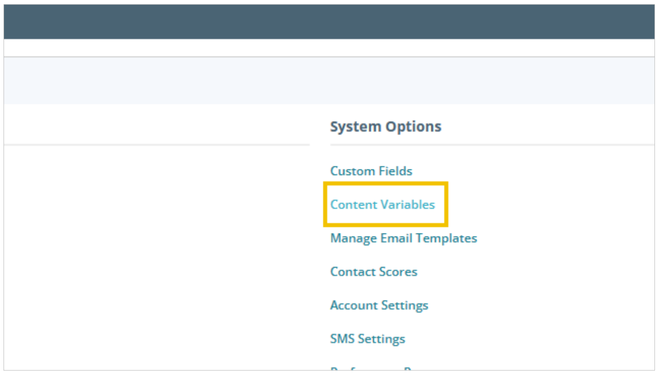
Fill in the Name, the optional Description and then pick the Data Type of your new field. Save to add that field to your account.

NOTE: The data you map to that field on an import must match the data type you have selected.



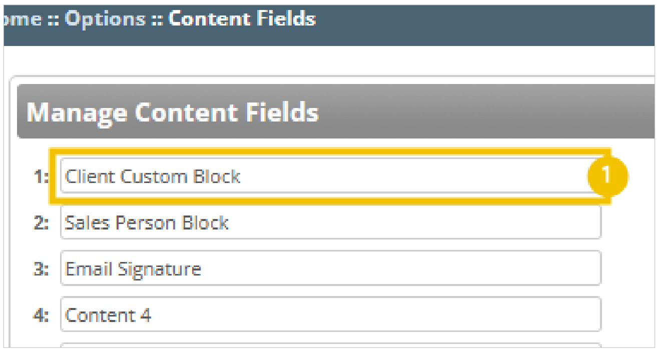
19.5.2. Content Variables

You can use Content Variables to assign blocks of content to contacts.

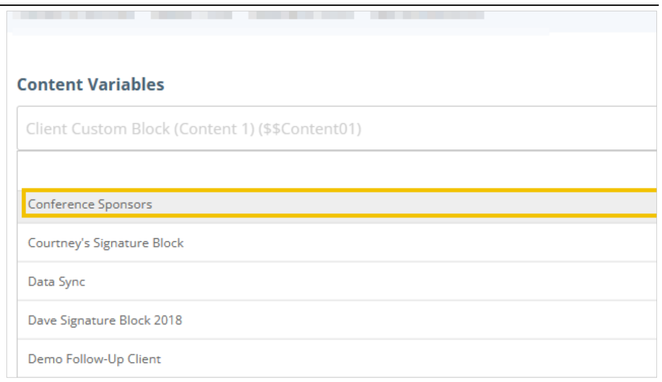


Ten Content Variables are available in your account. You can name them specifically for the variable you plan to use and then assign blocks on contacts to that field.

1. **Edit Name**: Edit the name of the content field and click Save.

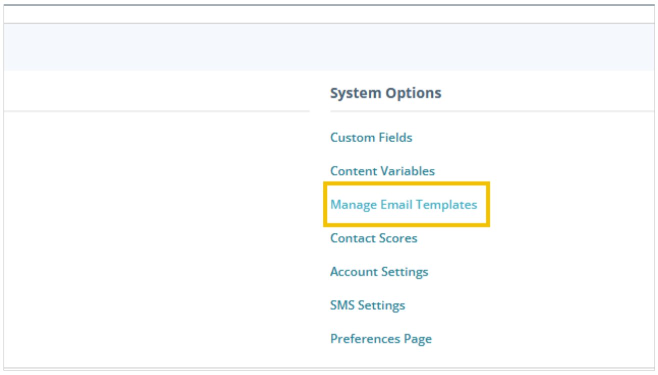


Assign any existing Content Block within your account to that field for every contact. You can do this individually by editing the contact record, through bulk update, over an API call, or through an import.

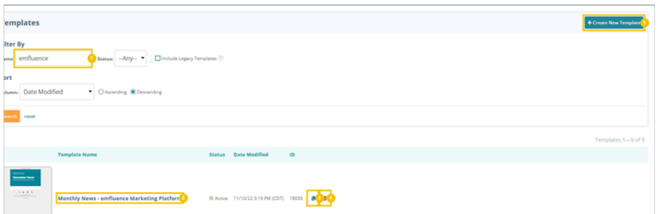


19.5.3. Manage Email Templates

Users with access to Template Builder can click on Manage Email Templates to see and edit any template they have access to.



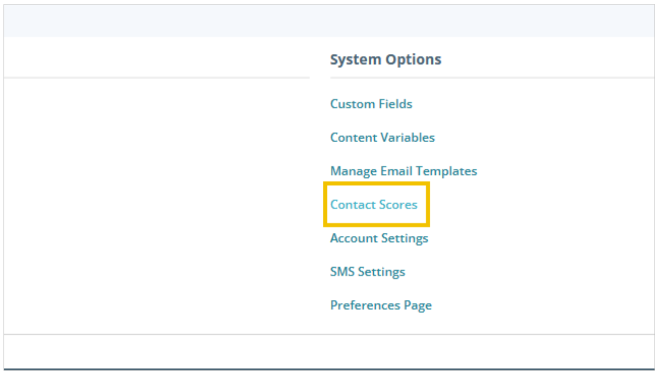
Template Builder provides users with access to see, edit, create, and delete templates.



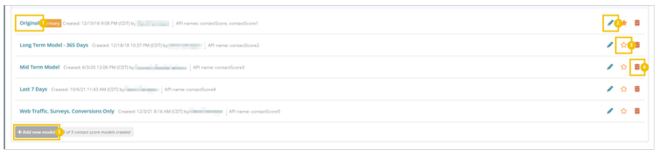
1. **Search**: Search for templates by name, status, and include any legacy templates in your search (these templates are hidden because they cannot be edited within template builder).
2. **Template Name**: Click on the name of the template to see and edit the template.
3. **Copy**: Create a copy of the template.
4. **Delete**: Delete the template to permanently remove it from your account.
5. **Create New Template**: Create a new template starting with one of the example templates provided or code your own template.

19.5.4. 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.

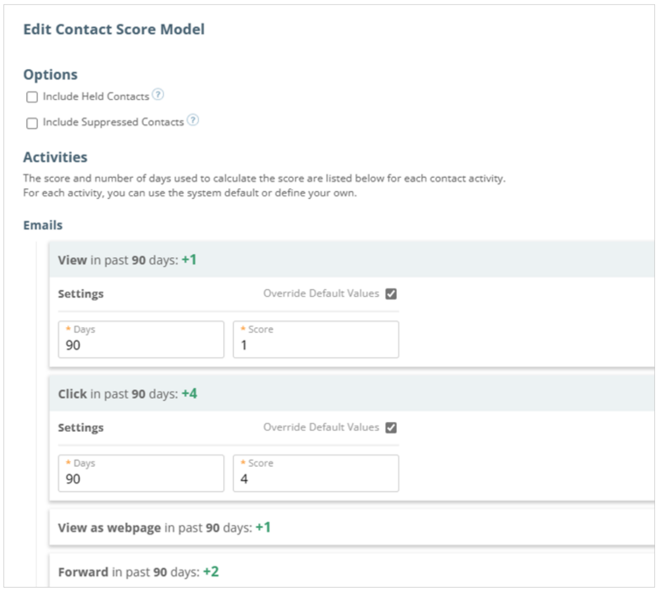


Contact Score Models



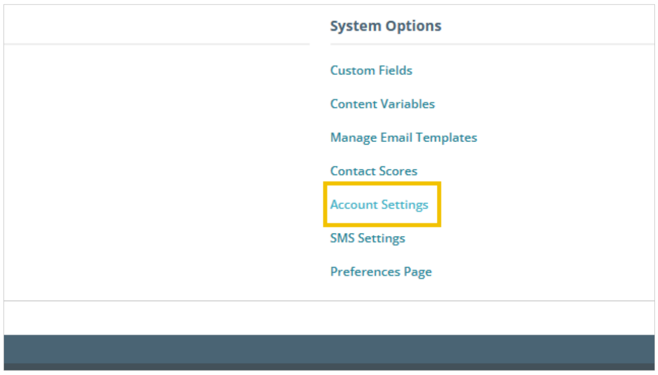
1. **Scoring Models**: Click on any existing scoring model to edit
2. **Edit**: Click to edit the scoring model.
3. **Primary**: Click to make that score the primary score in your account.
4. **Delete**: Click to remove a scoring model.
5. **Add new model**: Click to add additional scoring models.

Expand and edit any values, remembering to save to see the contact score updated.

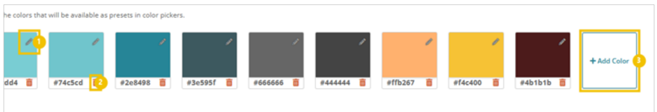


19.5.5. Account Settings

Account Settings includes basic information tied to your account including brand colors, social links, your CAN-SPAM Address, and your authenticated sending domains.

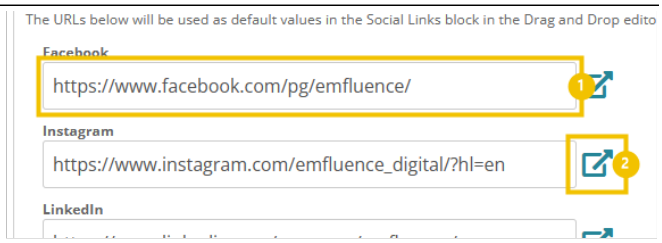


Brand Colors allows you to add any brand colors to your account which will be included wherever a color-picker is shown in emfluence.



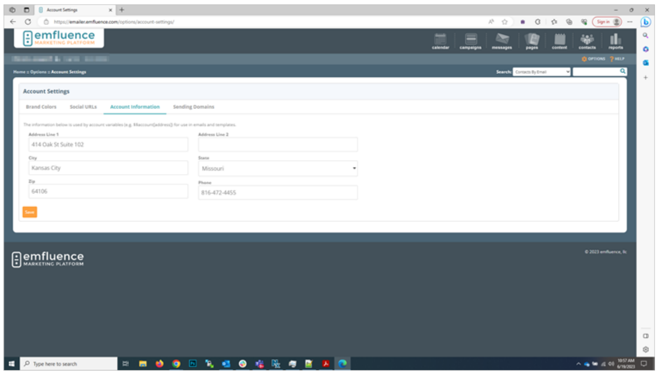
1. **Edit**: Edit an existing color by changing the hex code of the color.
2. **Delete**: Remove an existing color from your list of brand colors.
3. **Add Color**: Add a new brand color by typing or pasting the hex code value and saving.

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.

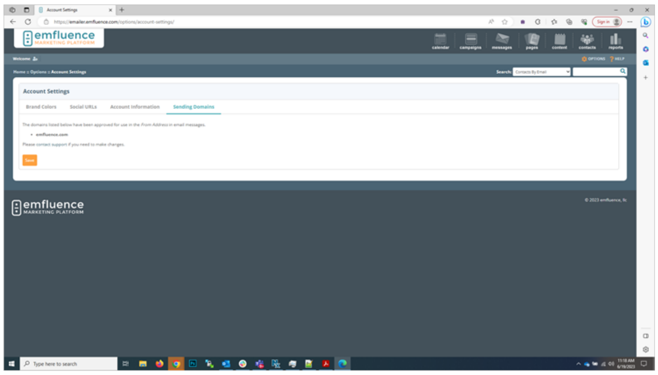


1. **URL**: Type or paste the URL
2. **View**: Launch the URL in a new tab to confirm you have the correct URL.

Account information is where your CAN-SPAM address is stored. Updates to these values will update any templates using the account variables.

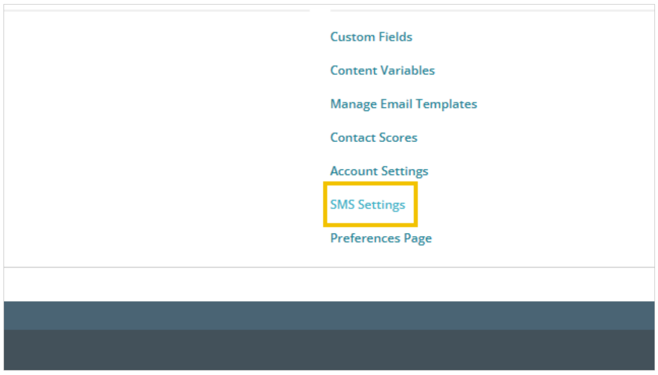


Sending Domains will show the available domains from which you can send email through the emfluence Marketing Platform. Domains should be authenticated prior to be added to an account.



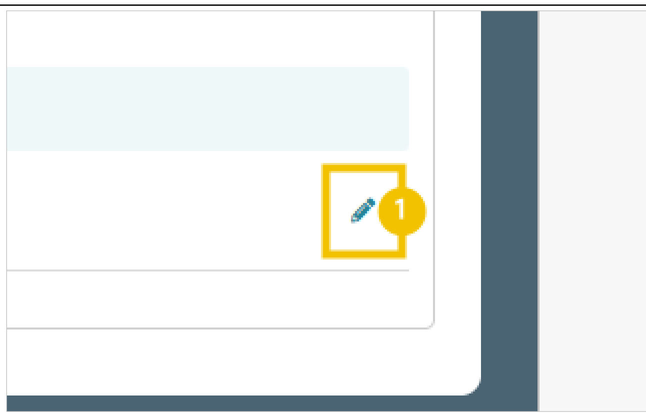
19.5.6. SMS Settings

SMS Settings allows you to share access to SMS with restricted users within your account.



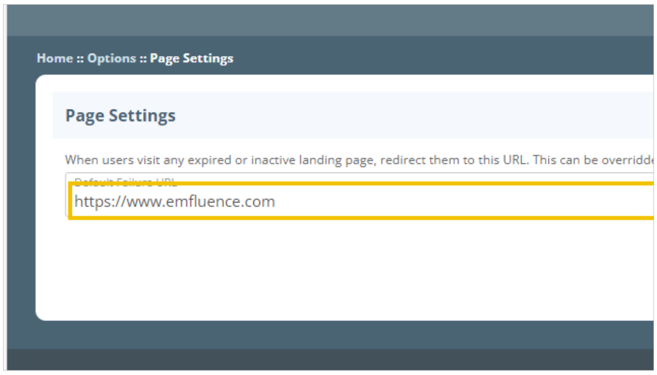
SMS Settings

1. **Edit**: Click to edit to add or remove restricted users to your SMS Messaging Service.



19.5.7. Page Settings

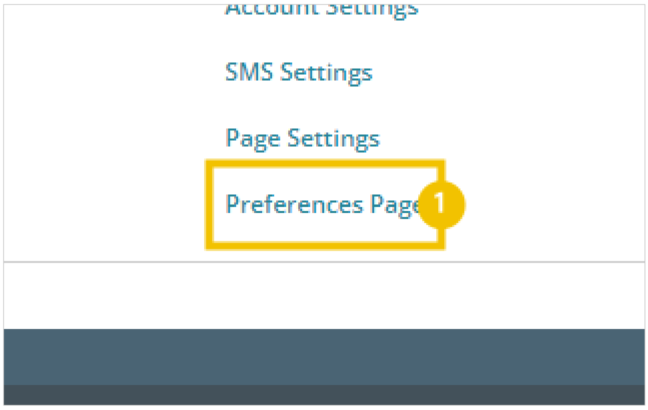
Page Settings allows you to set a default failure URL for any landing page that has been deactivated. This can also be set on an individual landing page. NOTE: If a landing page was given a different fallback URL that will overwrite this default.



19.5.8. Preferences Page

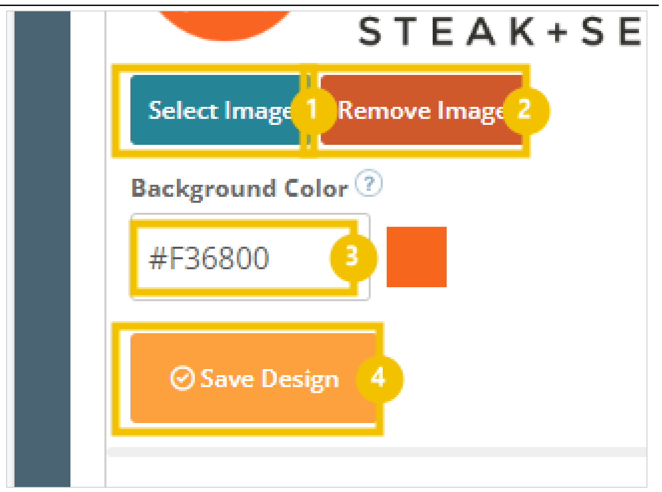
Preferences Page

1. **Preferences Page**: Click Preference Pages in the Options menu to set or edit preferences tied to your Unsubscribe Page.

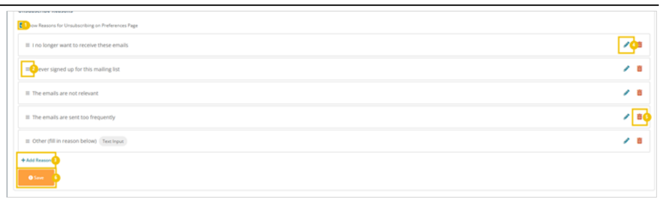


Under Design, you can set a brand image and brand colors to customize the design of your Unsubscribe Page.

1. **Select Image**: Click to select an image from your Uploaded Files, or load and select a new image. NOTE: Avoid large images that might overwhelm the page.
2. **Remove Image**: Click to remove the image from the page.
3. **Background Color**: Set a color to display as the background of the page.
4. **Save Design**: Save the design. To test your page, send yourself a proof email and click the unsubscribe link. As you edit and save you can refresh that page on your browser to see the changes apply.



Under Unsubscribe Reasons, the Preferences Page will allow you to turn on and create, edit, and delete reasons for unsubscribing which your contacts will be shown.

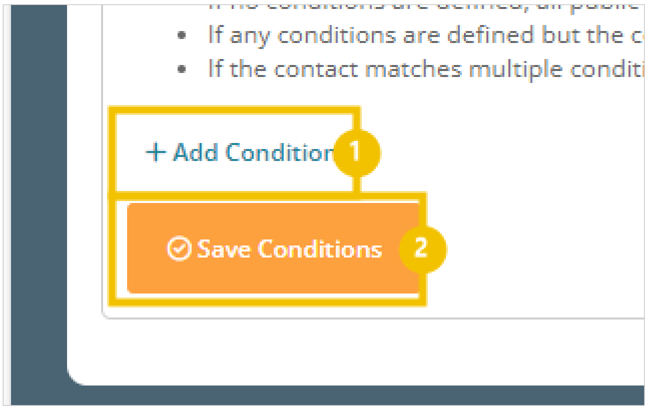


1. **Activate Unsubscribe Reasons**: Check the box to turn on and display the list of default unsubscribe reasons.
2. **Reorder**: Click and drag the reasons to display in the order you wish.
3. **Add Reason**: Add additional unsubscribe reasons to your list.
4. **Edit**: Edit an existing reason.

5. **Delete**: Remove an existing reason.
6. **Save**: Save all changes.

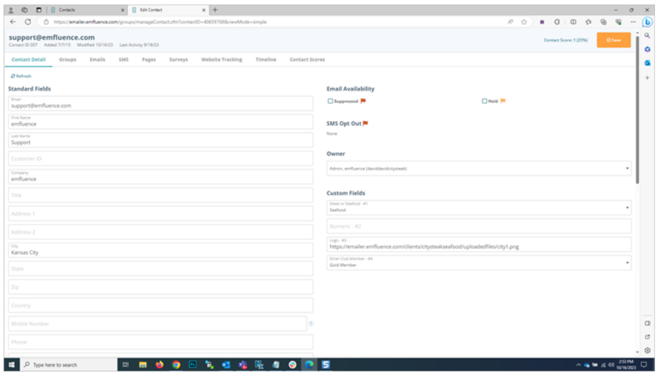
Conditional Preferences will allow you to use custom logic to decide which groups may show up for individual contacts in the preferences center. NOTE: The groups will need to be Public Groups to display.

1. **Add Condition**: Add a condition which will include you choosing a Field (example: City), Operator (example: Equals), a Value (example: Kansas City), and the Group(s) to display.
2. **Save Conditions**: All changes are saved

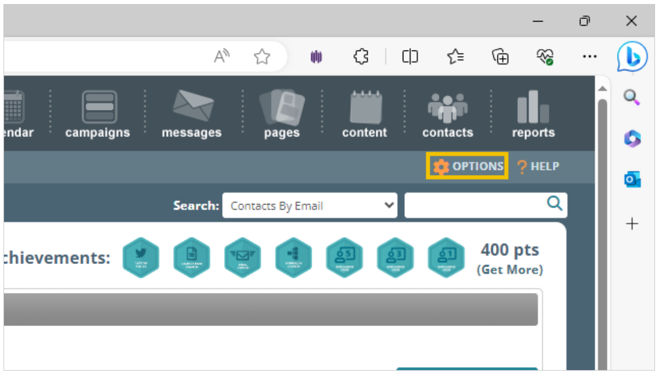


19.6.Custom Fields

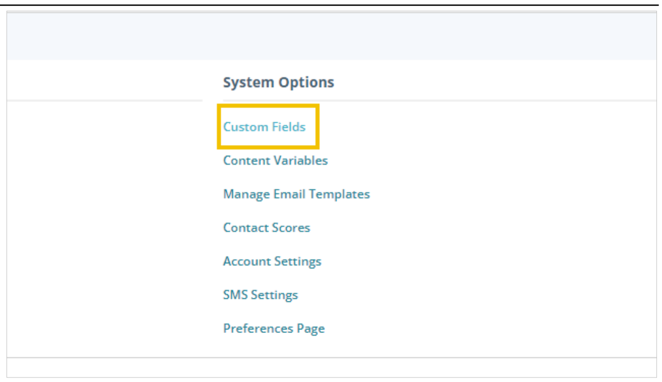
Contact data is saved on the contact record. Contact details, such as standard fields (emails, first name, last name, city, state, etc.) are premade in every account. For any data point you have that doesn't have a corresponding field, you can create a custom field. Once created, data can be saved on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

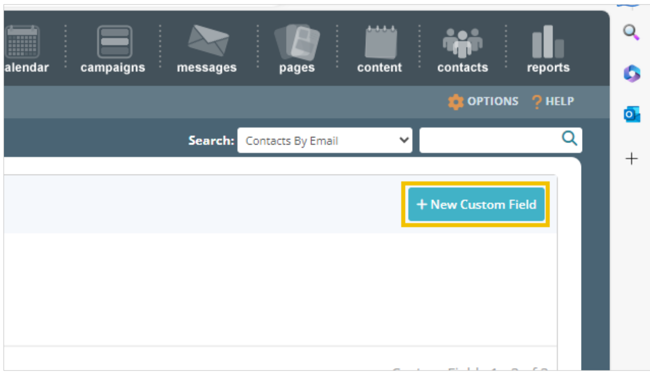
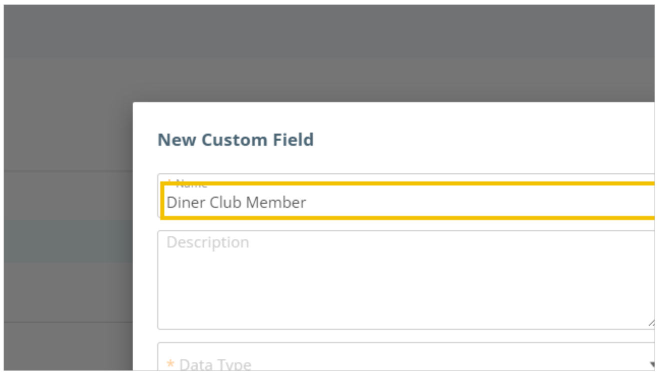
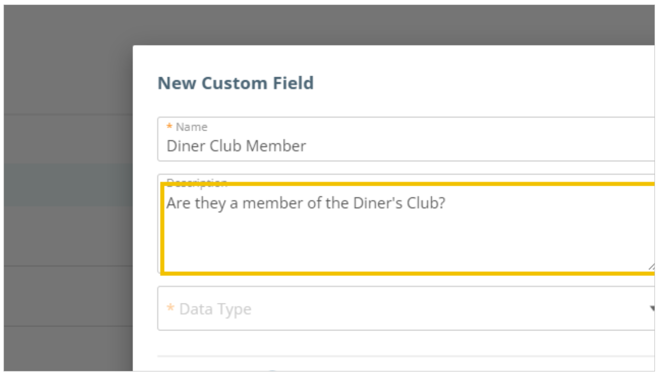
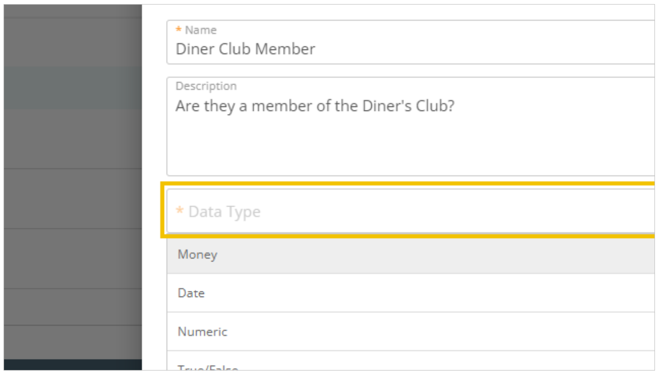


To edit existing custom fields and create new fields, click on **OPTIONS**.

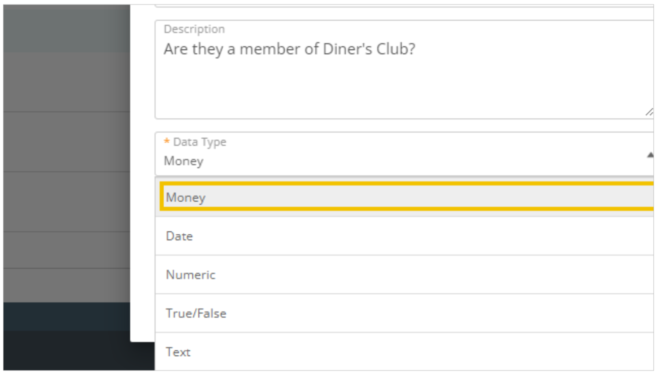


In the middle column, under **System Options**, find and click on **Custom Fields**.

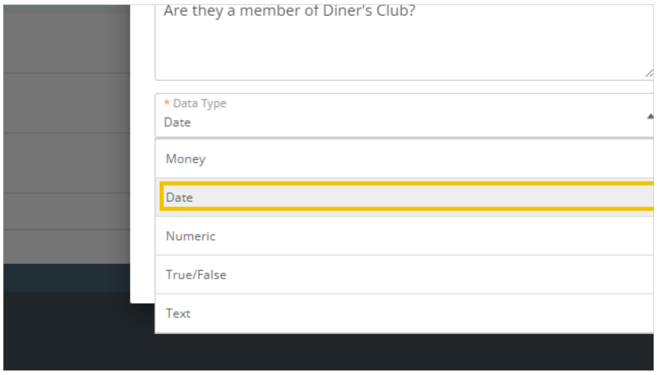


To create a new custom field, click on **New Custom Field**.	
Give your new field a name. You will be able to edit the name of your field later if you wish.	
You can add a description for your field to provide more information about how you are using the field in emfluence to your team's other users. Descriptions are not required.	
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.	

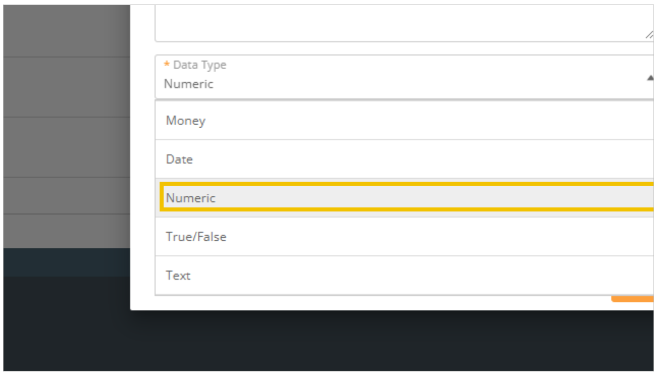
The **Money** field is a numeric field with a decimal place two places in. To allow for different type of currency, the field does not include a dollar sign, pound sign, etc. When using this field as a variable in an email, remember to add the appropriate monetary sign before the variable.



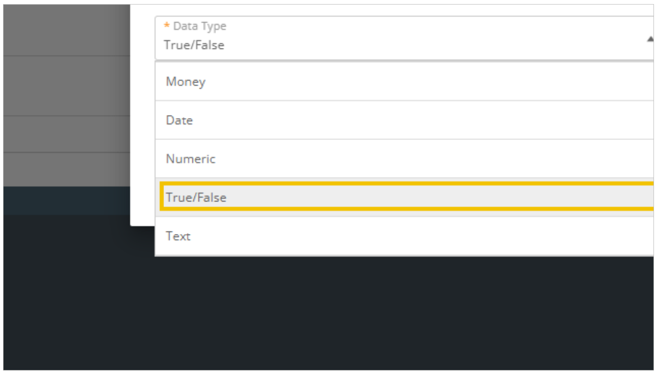
The **Date** field stores data in a standard MM/DD/YYYY format. It will also accept M/D/YYYY or YYYY/MM/DD values. A date field will not accept a time stamp along with the date. It is a date field only.



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.

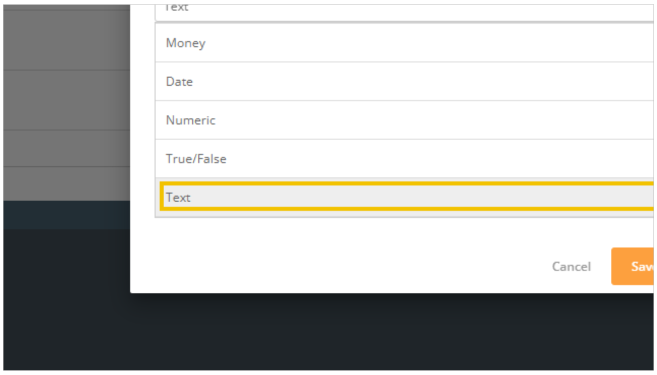


The **True/False** field is a Boolean field that will accept values of True, False, 1, and 0.

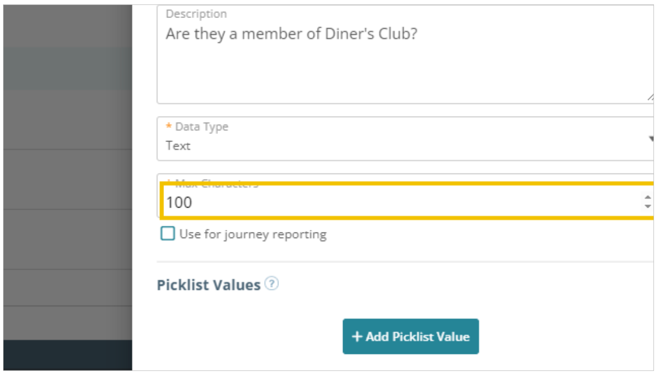


arapp@emfluence
.com

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

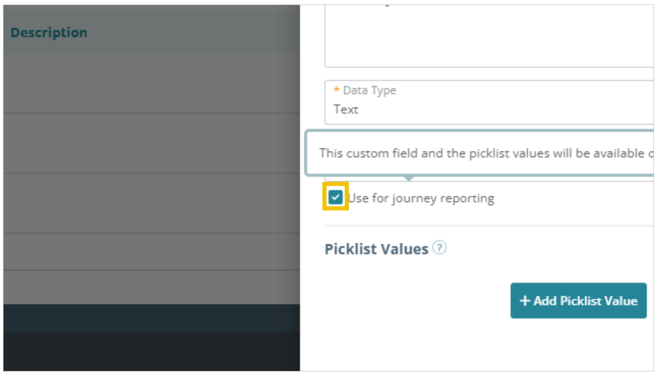


When creating a text field you will need to choose a max character count. By default, 100 characters is chosen. You can expand this up to a maximum of 1,000 characters. No value larger than that can be saved in a custom field.



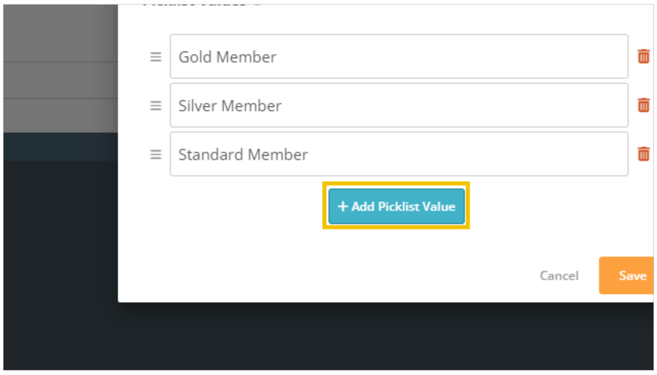
If you wish, text fields can be used in **Journey Reporting**. To enable this, check the box and add at least a single picklist value.

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.

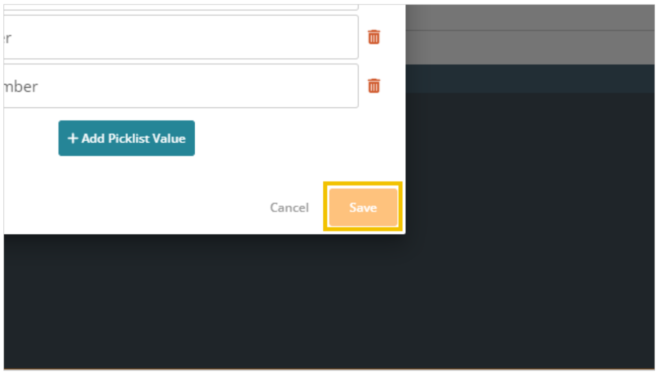


Picklist Values limit what data can be saved in this field to exact values listed here. Attempts to save a different value to this field will fail.

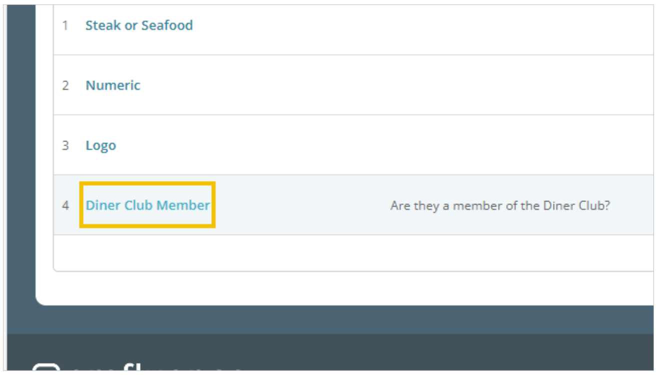
Picklist Values can be used to enable Journey Reporting which is visible on the home page dashboard. They may also be in place to limit entries to this field to a very specific set of values.



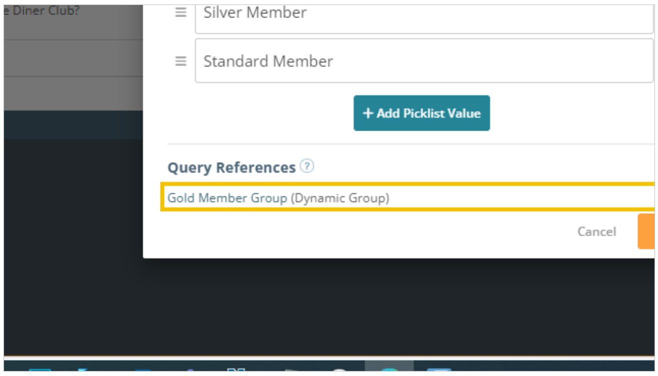
After you have finished creating your custom field, click to **Save**.



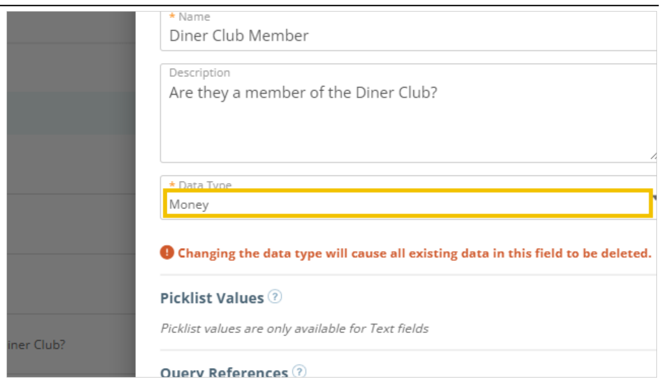
To edit a custom field, click on the field's name. This will launch the same pop-up used when creating a field.



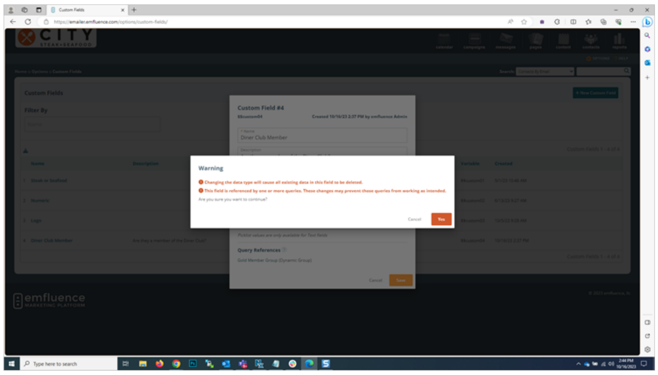
At the bottom of the field, under **Query References**, you will see any saved queries making use of this custom field. These could be in dynamic groups, workflow decisions, or in exit conditions of a workflow. You can click on any result in this section to be taken to that query.



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.



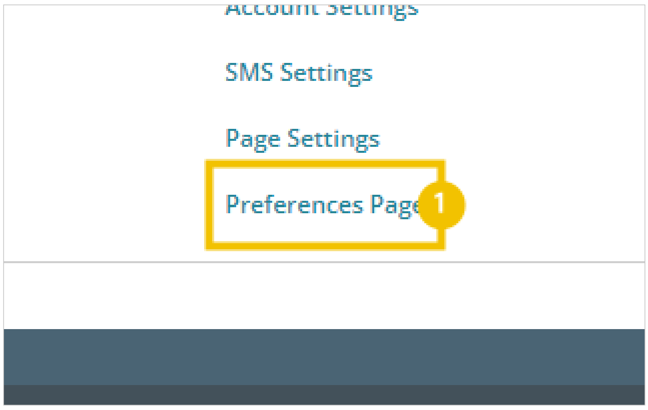
If you choose to overwrite values on your custom field, and click save, you will get a secondary warning letting you know if any queries could potentially be broken by this change and that any saved values in this field will be wiped out. There is no undo button, so just be certain you are ready before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



19.7. Preferences Page

Located in the Options menu, Preferences Page allows you to make changes to your Unsubscribe Page.

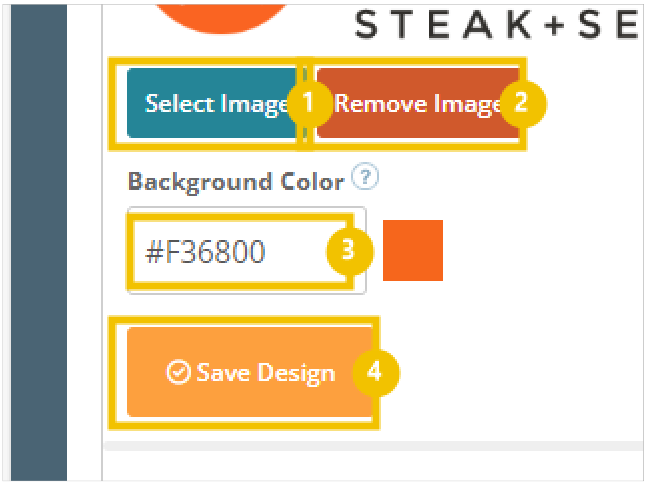
1. **Preferences Page**: Click Preference Pages in the Options menu to set or edit preferences tied to your Unsubscribe Page.



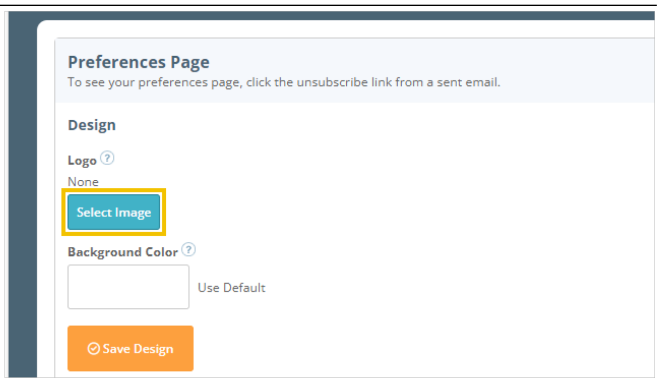
19.7.1. Design

Under Design, you can set a brand image and brand colors to customize the design of your Unsubscribe Page.

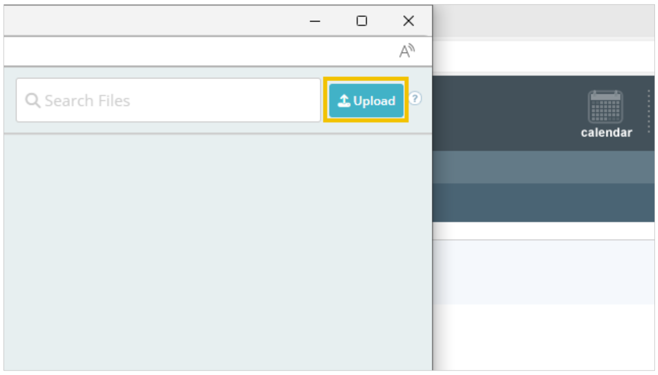
1. **Select Image**: Click to select an image from your Uploaded Files, or load and select a new image. NOTE: Avoid large images that might overwhelm the page.
2. **Remove Image**: Click to remove the image from the page.
3. **Background Color**: Set a color to display as the background of the page.
4. **Save Design**: Save the design



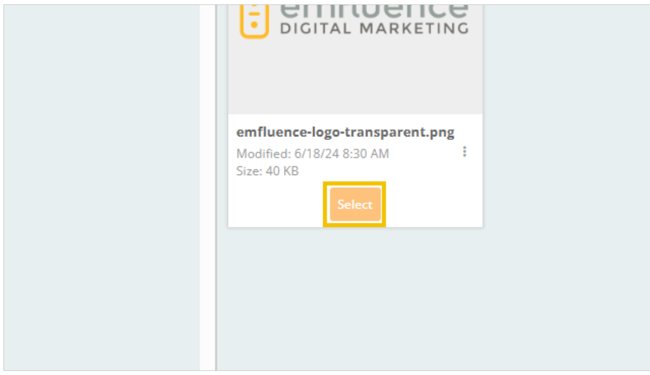
You can add a brand logo by clicking on **Select Image**.



In Uploaded Files, if your image is not already uploaded to your account, click on **Upload** and upload the image from your computer.

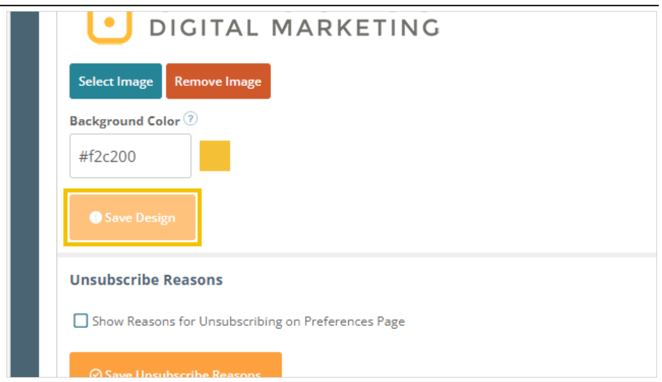


Click on **Select** to choose your image.



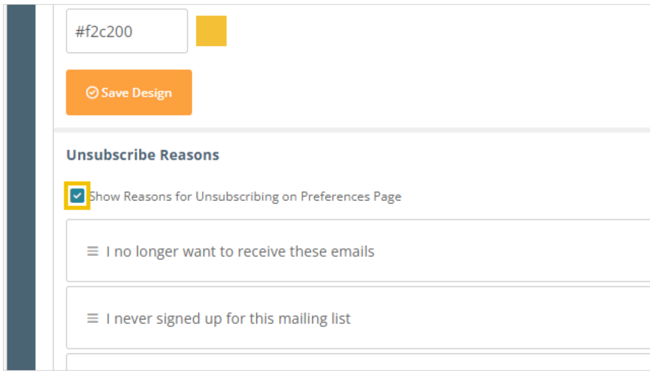
To change the background color of your unsubscribe page, add the hexcode for the color you want to use under **Background Color**. If you have branded colors added to your account, you can choose one of those from the picker.

Click **Save Design** to save your changes.



19.7.2. Unsubscribe Reasons

You can also add Unsubscribe Reasons to your unsubscribe page. These will allow the contact unsubscribing to provide a reason why they no longer wish to hear from you. To enable this feature, check the box to **Show Reasons for Unsubscribing on Preferences Page**.



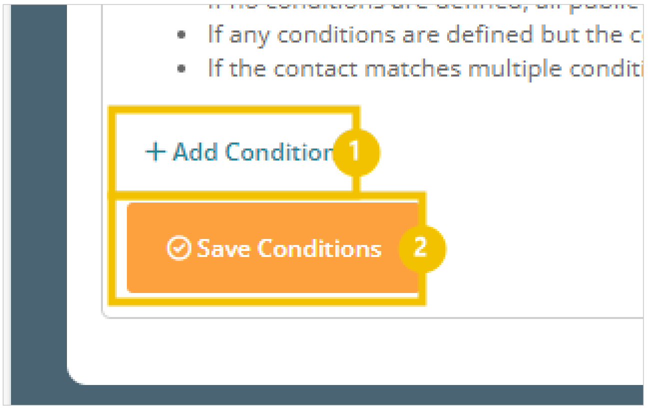
Unsubscribe Reasons

1. **Reorder**: Click and drag the reasons to display in the order you wish.
2. **Add Reason**: Add additional unsubscribe reasons to your list.
3. **Edit**: Edit an existing reason.
4. **Delete**: Remove an existing reason.
5. **Save**: Save all changes.

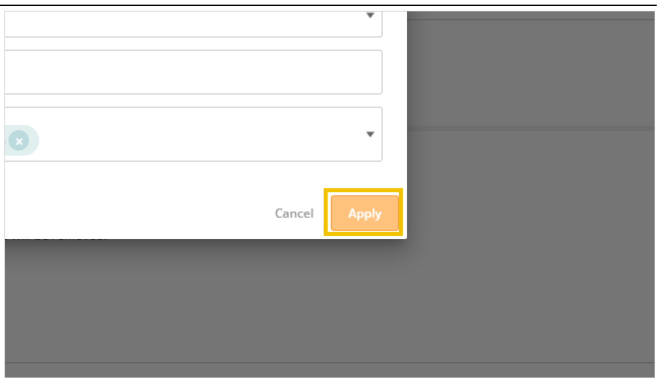
19.7.3. Conditional Preferences

Conditional Preferences will allow you to use custom logic to decide which groups may show up for individual contacts in the preferences center. NOTE: The groups will need to be Public Groups to display.

1. **Add Condition**: Add a condition which will include you choosing a Field (example: City), Operator (example: Equals), a Value (example: Kansas City), and the Group(s) to display.
2. **Save Conditions**: All changes are saved



Set the logic for your conditional preferences by filling in each required field. You will need to first choose a specific standard or custom **Field**, an **Operator**, the **Value** you are looking to match, and the **Group(s)** you wish to display. When finished, click on **Apply**.



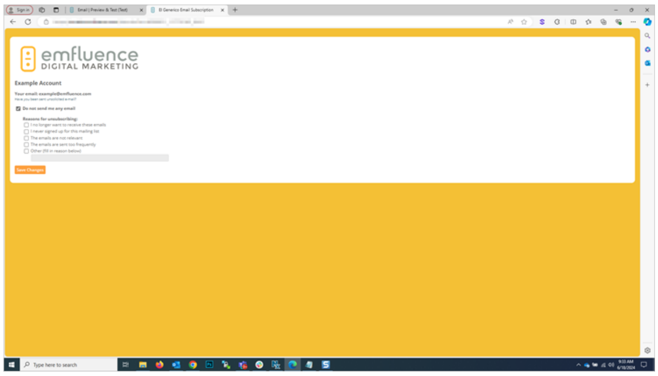
When finished, you will see your conditional preferences listed.

1. **Edit**: Click to edit the logic of any existing conditional preferences.
2. **Delete**: Click to remove any existing conditional preferences.
3. **Add Condition**: Click to add any additional conditional preferences

4. **Save Conditions**: Click to save.

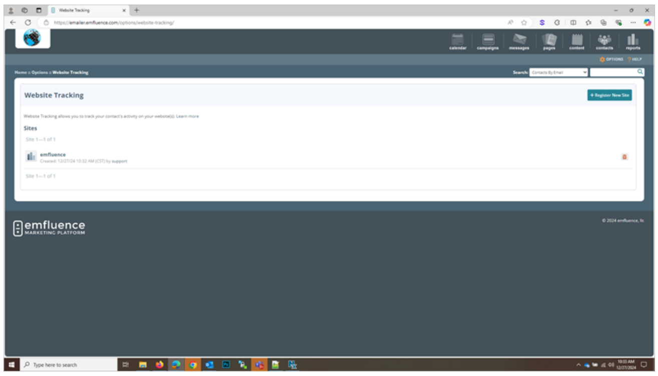
19.7.4. Test

You can test the changes on your page by sending yourself a Proof email and clicking on the unsubscribe link. If needed, you can swap out your logo, or make other changes, and save, and then refresh your unsubscribe page to see the new changes apply.



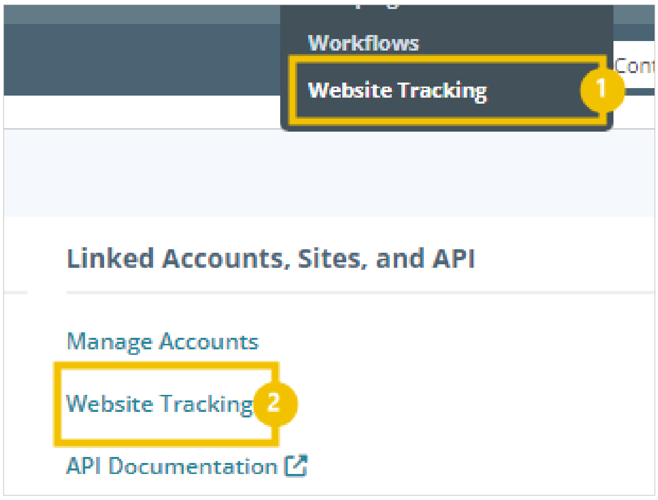
19.8. Website Tracking

Website Tracking allows you to place code on your website. Activity from known emfluence contacts can then be tracked across your site letting you know what pages they frequent and how long they stay on each page. emfluence does not track unknown contacts.



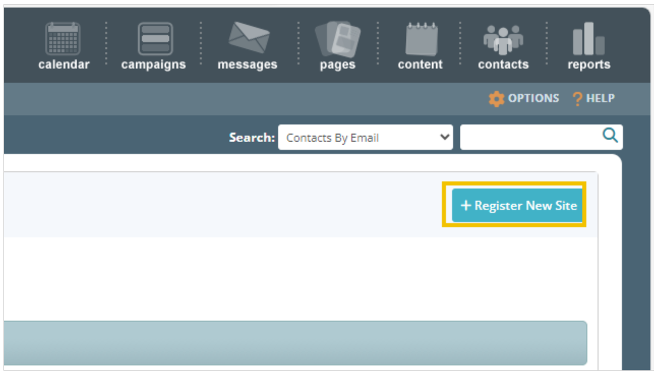
Website Tracking can be accessed either through the Campaigns dropdown menu or in the Options menu under Linked Accounts.

1. **Website Tracking**:
2. **Website Tracking**:



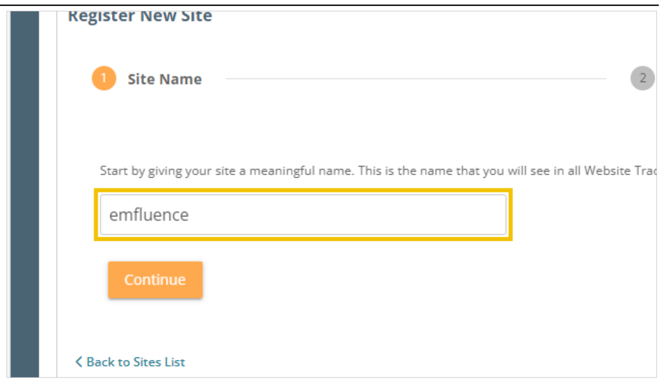
19.8.1. Set up

The first thing you need to do is to register the site you wish to begin tracking. Click on the button **Register New Site**.

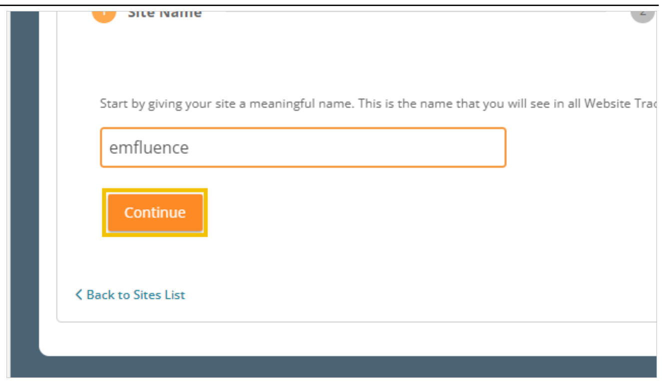


Enter the **site name** you wish to track. This can be anything, but we recommend you make it something obvious for easier reporting.

You can track multiple domains under the same site or set them up separately under different sites.

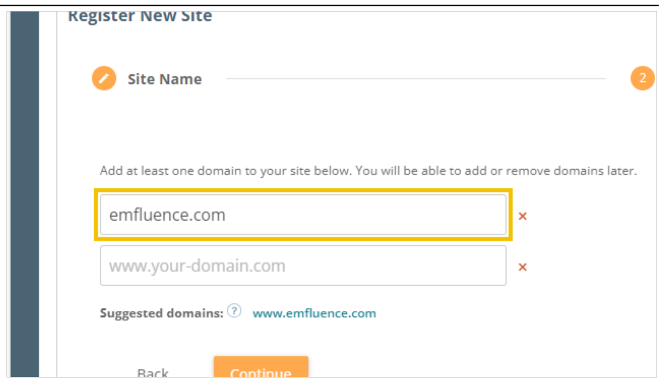


Click on the button to **Continue**.

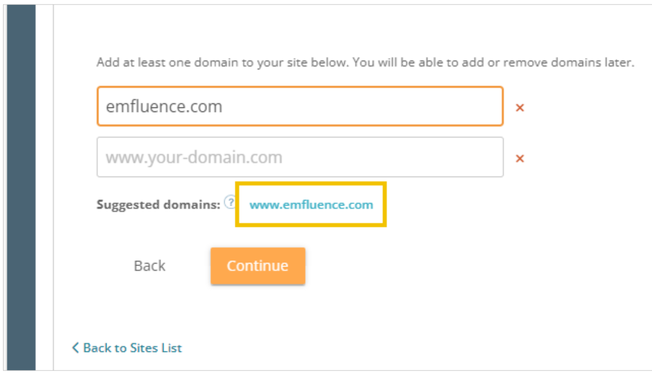


Type or paste the domain, not the full URL just the domain, into the field.

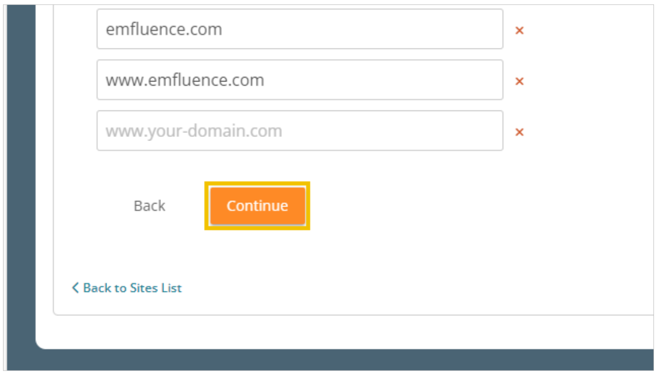
NOTE: You can set up separate tracking for subdomains but you cannot set up different paths for the same domain as the whole domain will be tracked. However, in the reporting you can drill down to view specific pages.



If you have pasted in the domain, the platform will suggest the www variant. If you did the www variant, the platform will suggest the domain. We suggest putting both in as if you only do one, and your site redirects to the one you are not tracking, no tracking can be recorded.

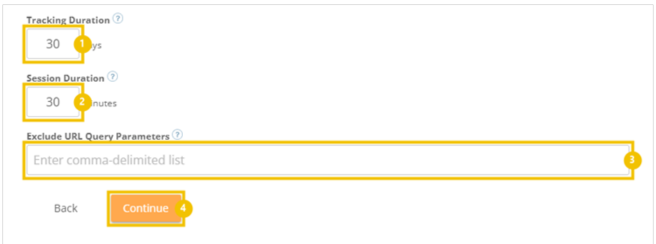


You may choose to add other domains if you wish using the same steps. When finished, click **Continue.**

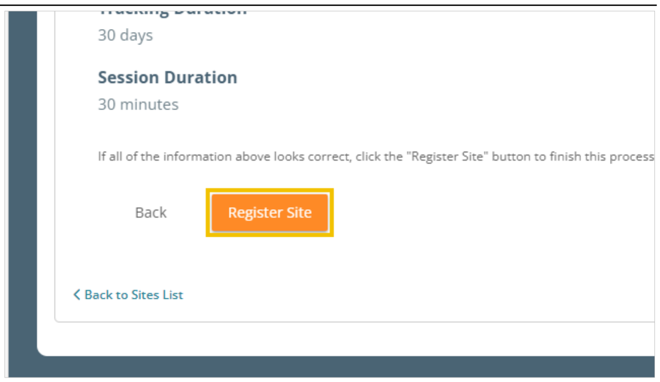


On this step you will set options for your tracking code.

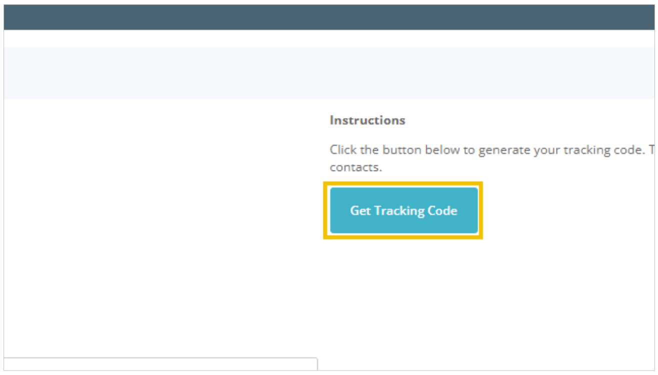
1. **Tracking Duration**: Set how long the browser cookie will last between visits before expiring. Each visit by the contact resets the count.
2. **Session Duration**: Set the expiration for inactivity on a single visit. If a contact is inactive for longer than this period of time, and then begins interacting with the page again, that new activity will be recorded as a separate visit.
3. **Exclude parameters**: If there are certain parameters you would like to exclude from tracking, add them here.
4. **Continue**: After setting your tracking options, click Continue.



Review your information and then click **Register Site**.

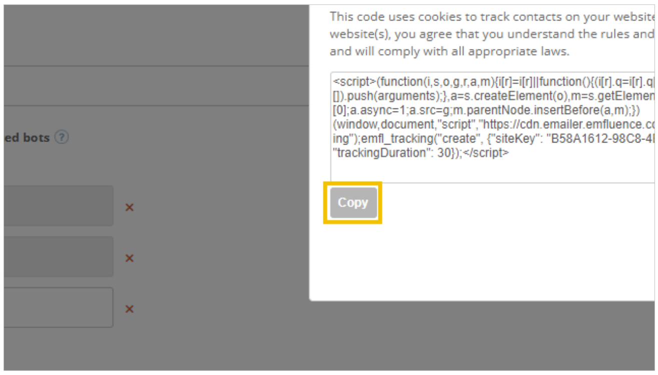


After setting up the tracking you will then need to copy the tracking code and get it onto your website. Click **Get Tracking Code**.

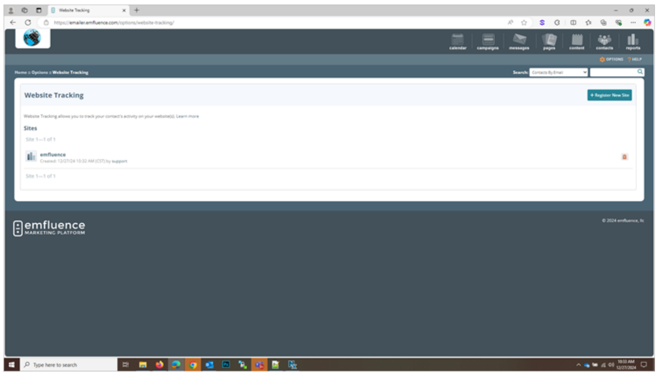


Copy the code and have it placed on your website. We suggest putting the code somewhere that will show across all pages on your site, such as in the header of footer. Pages where the code doesn't load will not be tracked.

NOTE: If you are saving the code to be placed at a later date, or by another member of your team, make sure to save it in a text-only document. Do not save it in Word.



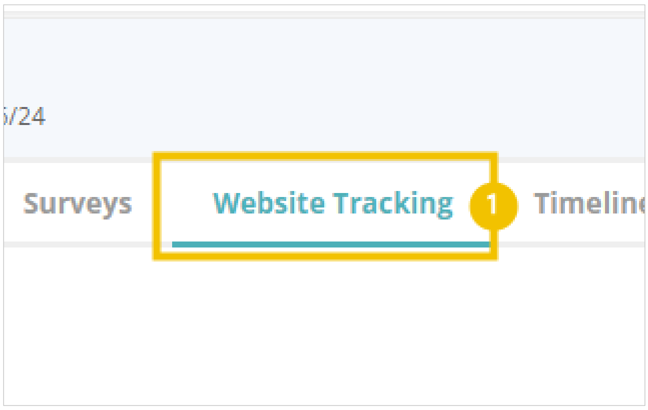
Returning to the main Website Tracking menu, you will see your saved tracking set up. Tracking will not begin until you have your tracking installed on your website and then you begin cookieing your contacts by sending emails through emfluence with URLs to tracked pages. Until a contact is cookie'd, no tracking can occur.



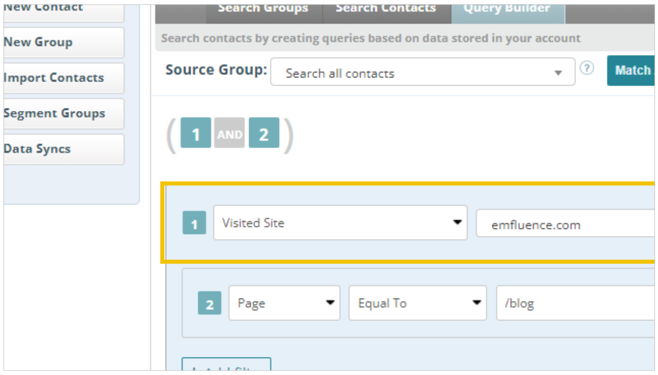
19.8.2. Contacts

Along with website tracking reporting, website tracking data is also stored on the contact record and can be seen both on the Website Tracking tab and the Timeline tab of a contact's record.

1. **Website Tracking**: Data will be shown here, organized by session. You can expand the session to see more information.

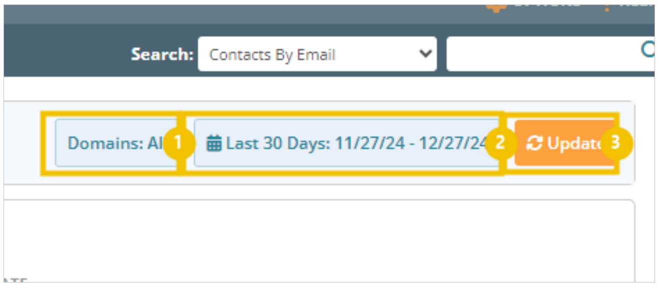


Website Tracking data saved on the contact record can be used in Query Builder.



19.8.3. Reporting

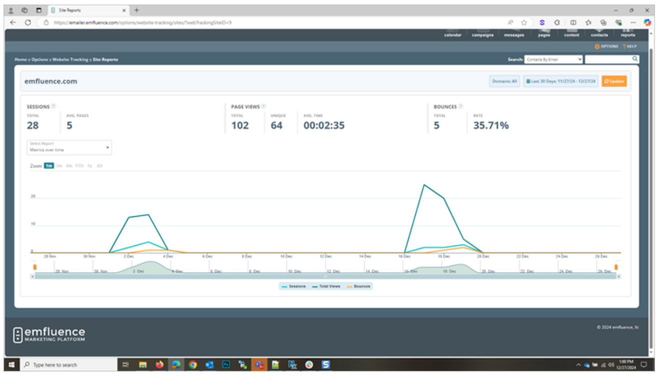
You can use the various options and reports within Website Tracking to examine your tracking data.



1. **Domains**: If you have set up multiple domains under the same Site, you can limit your reporting to just one domain.
2. **Date Range**: Set the Date Range of your reporting.
3. **Update**: Click Update to save your changes.

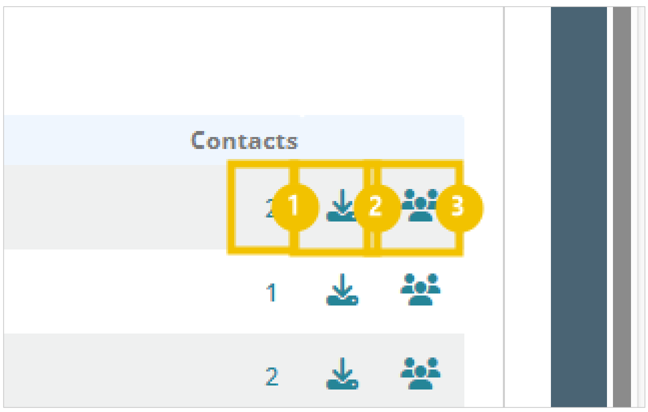
19.8.3.1. Metrics Over Time

The Metrics Over Time report provides a line graph of activity over the course of the chosen date range.



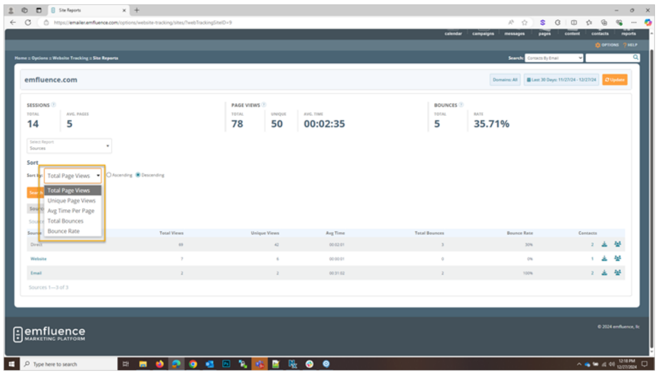
19.8.3.2. Sources

The Sources report organizes data based on the source of contacts coming to your website (such as through an email).



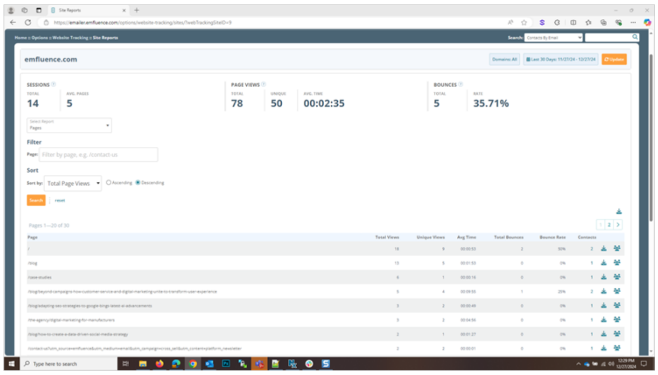
1. **Contacts**: Clicking on the number of contacts will provide you information about the contacts.
2. **Download**: Download the contacts in this report.
3. **Add/Remove to Groups**: Add or remove contacts in this report from groups within your account.

You can sort the source data from several different reports such as total or unique views, average time per page, bounces and bounce rate. In website tracking, bounces refers to contacts leaving the site.

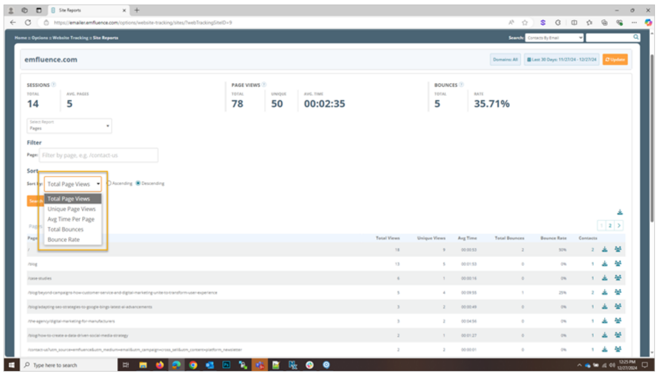


19.8.3.3. Pages

Pages reporting allows you to examine reporting starting from the URL of pages where contacts have visited. The same options of clicking on contacts, downloading, and adding to group are available.

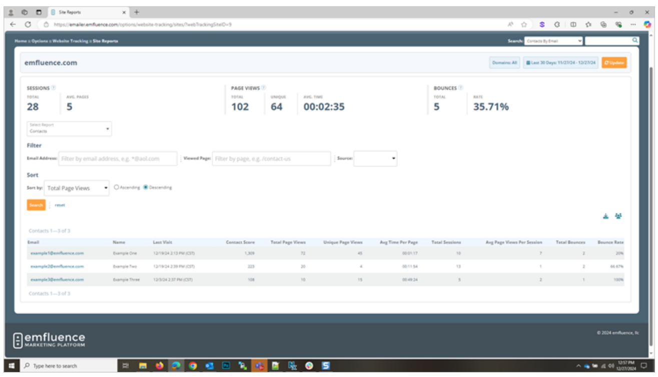


Pages reports can be sorted in separate reports for total and unique page views, average time per page, and total bounces and bounce rate. In website tracking, bounces refers to contacts leaving the site.



19.8.3.4. Contacts

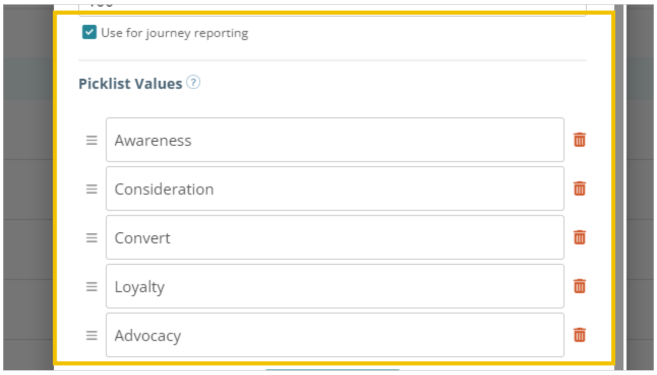
The Contacts report allows you to view data starting with contacts and see which contacts have visits within your timeframe.



19.9.Journey Stage

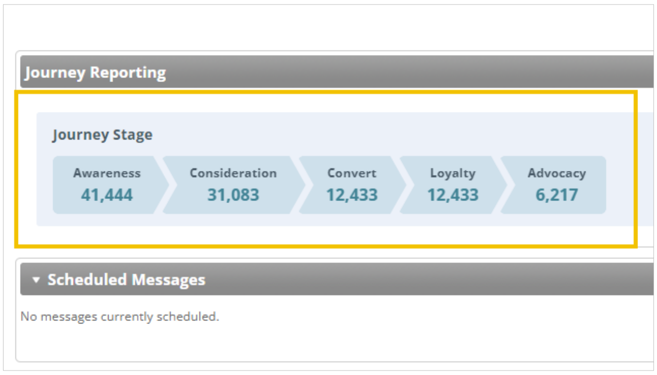
Through saving a set value on a **Custom Field** in emfluence, you can track each of your contacts' customer journey from Awareness through Advocacy.

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.

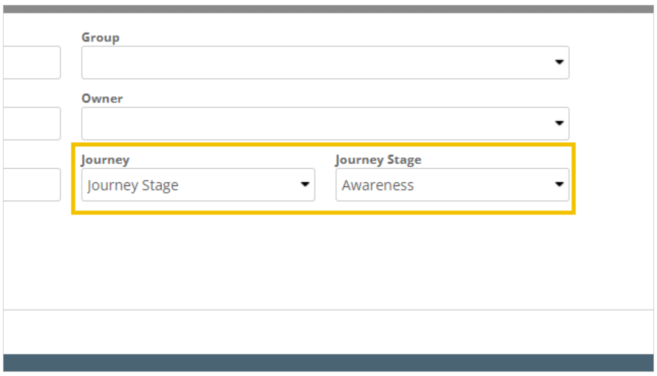


On the home page, if **Journey Reporting** has been enabled for any field, you will see the chart displayed with the breakdown of how many contacts appear in each stage. As with any of the charts on the home page, you can move it up or down in your list through the Options button at the bottom of the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

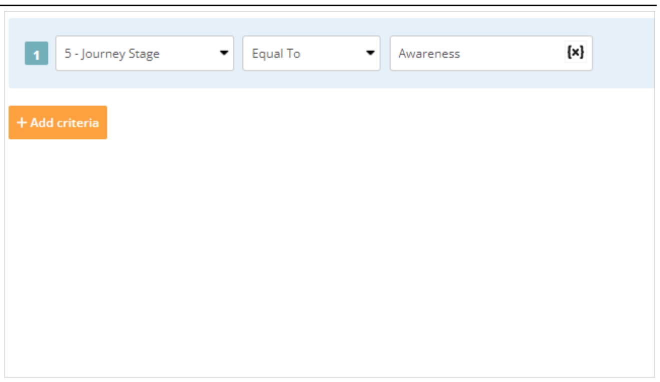
You can click on any of the stages to advance to the Search Contacts page with a list of those contacts in that page displayed.



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.

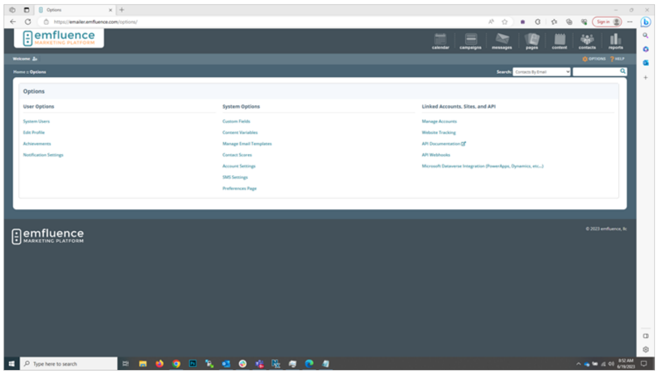


If you choose, you could also make use of **Query Builder** to search and create **Dynamic Groups** for each of your stages to make it easy to market to each subset quickly.



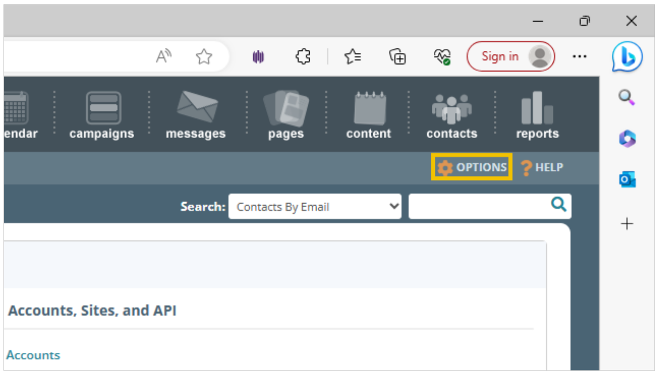
19.10. Notification Settings

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.



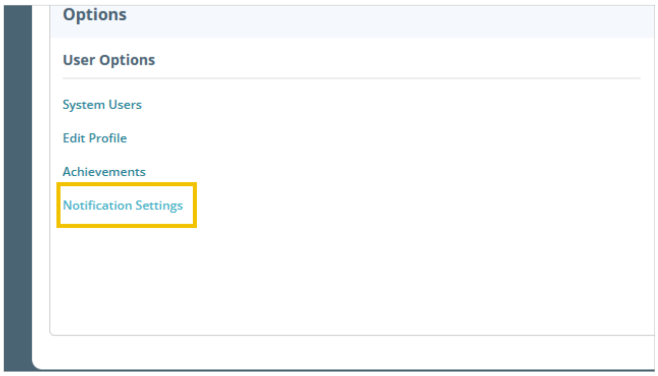
To get to the menu, click on the link **OPTIONS**

NOTE: Depending on your level of permissions, some items in the menu may not be accessible to you.

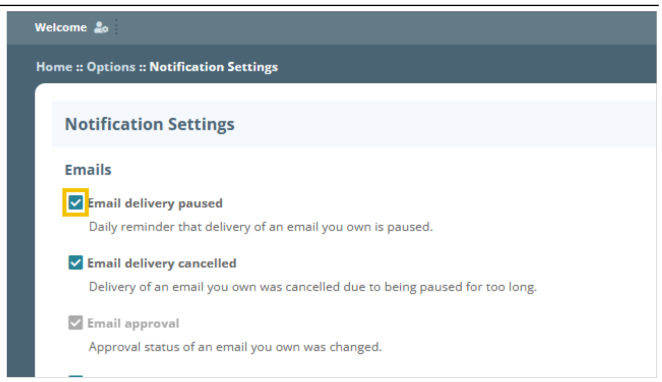


To control what kinds of notification emails you receive, click on the link **Notification Settings**

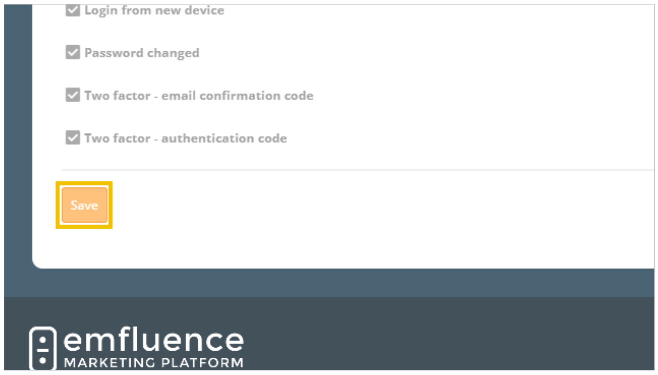
NOTE: Notifications-Only Users will default to this notification menu after logging-in as they are not granted any other access within the emfluence Marketing Platform.



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.

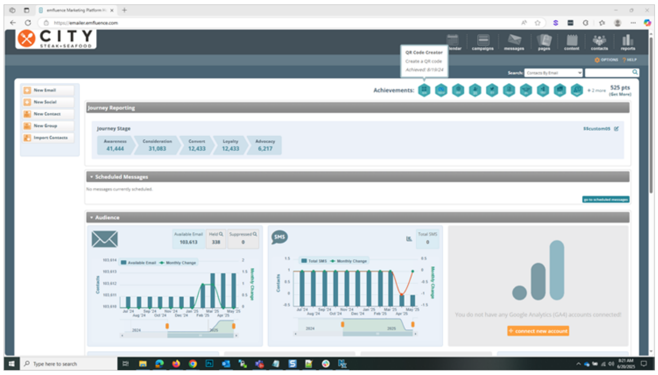


When you have finished making your changes, click on the button **Save**

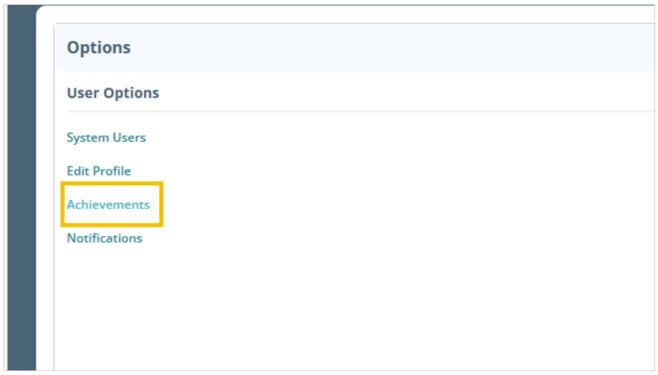


19.11. Achievements

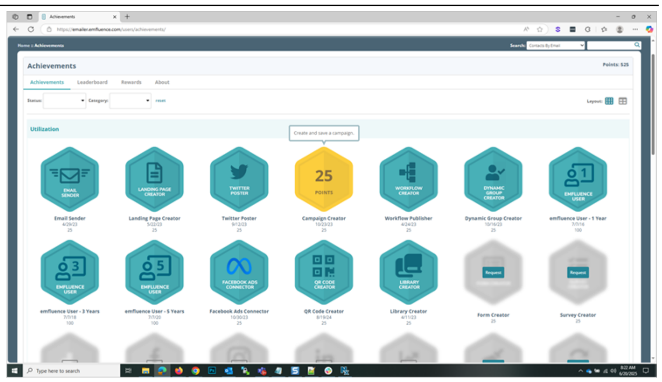
As you use more facets of the emfluence Marketing Platform you will be rewarded Achievements. Some will be automatically rewarded. Some must be requested. Recent achievements will be shown on the home page. To see more, click Get More.



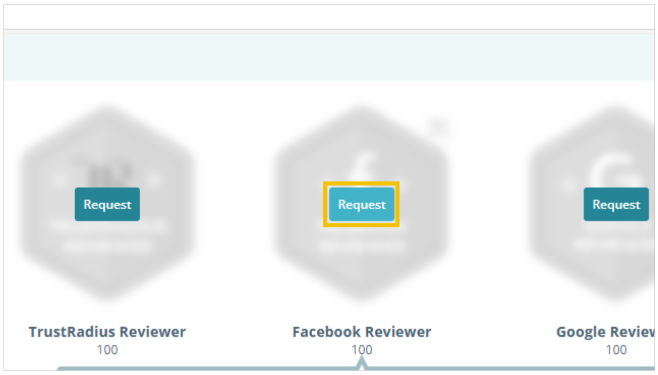
You can also get to Achievements through the Options menu by clicking on the link for **Achievements** under User Options.



Here you will see previously awarded achievements. If you hover over one, the point value will show.

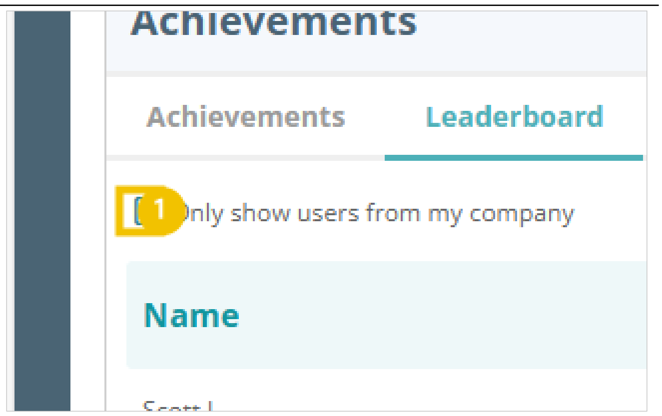


If you have completed an action that requires points to be assigned to you manually, such as filling out a review for the emfluence Platform, you can do so by clicking on **Request** on the achievement and providing the information about where and when this was completed.



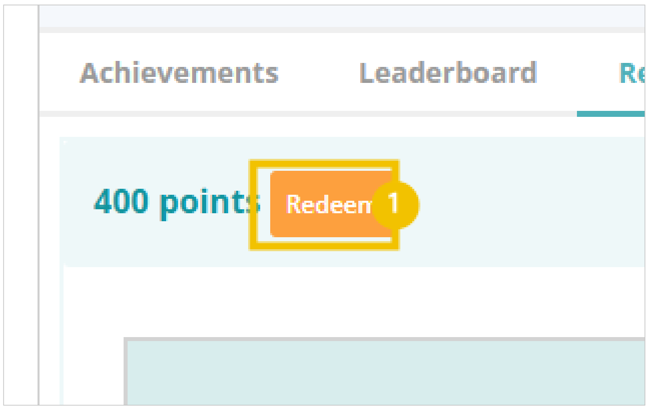
The Leaderboard will show both your score (top right) as well as a ranking and scores for other emfluence users.

1. **Only show users from my company**: Check this box to view only users within your account.

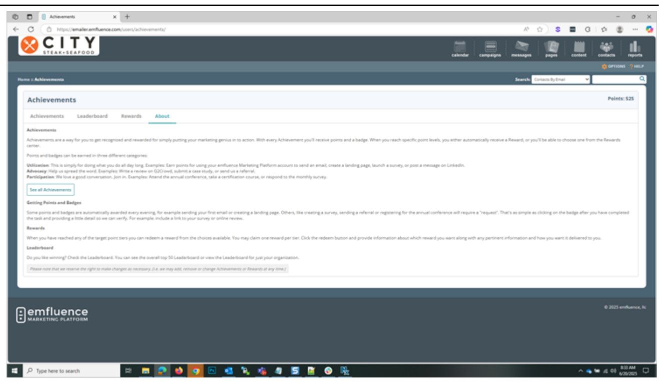


Rewards will show your points at the top of the page. Below, it will list items that can be redeemed for those points.

1. **Redeem**: To redeem a reward, click on Redeem. You can only redeem rewards if you have accumulated enough points for that reward. If your reward needs to be mailed, make sure to provide the necessary information for it to be delivered.

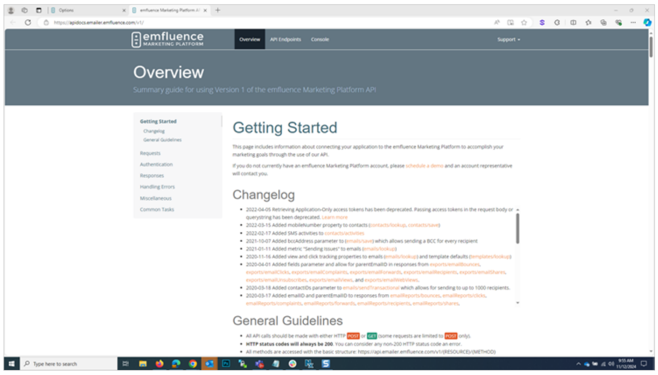


The About tab provides more information about Achievements.



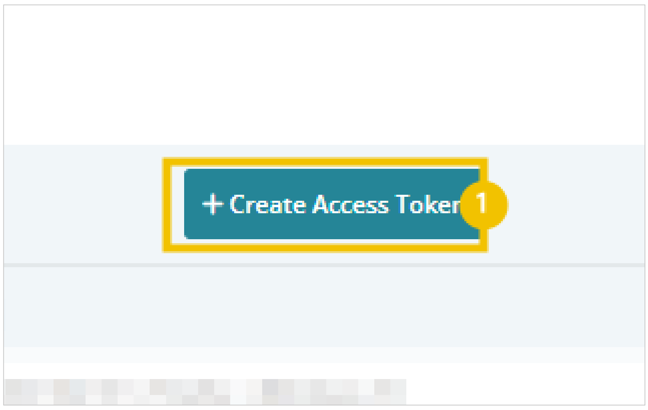
19.12. API

You can connect an outside system to emfluence through the use of emfluence's API. Using the API you can push data from your other system into emfluence or pull data out of emfluence.

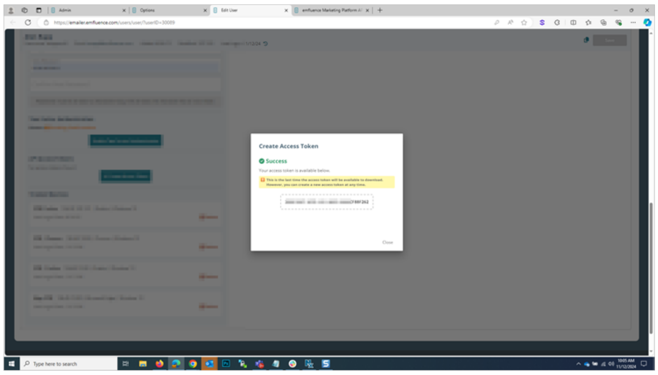


Access to the API is controlled through an API token. These are account specific, created on a client user in a specific account and saved on their record. The user's permissions control the access the token is given. emfluence usually suggests creating an API User to apply the token(s) to. NOTE: Reseller users can not create access tokens. Only client users in a specific account can create a token.

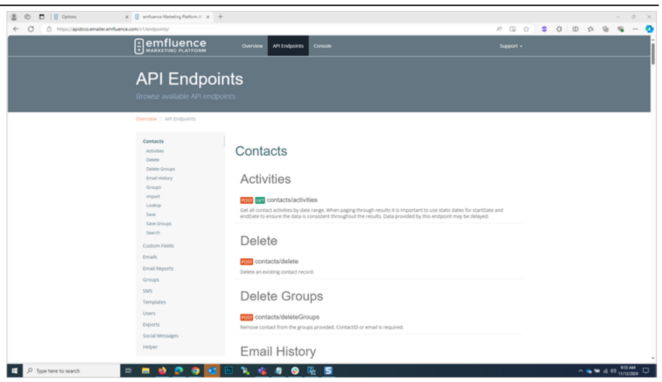
1. **Create Access Token**: You can create an access token. Permissions for the token are controlled by the user's permissions



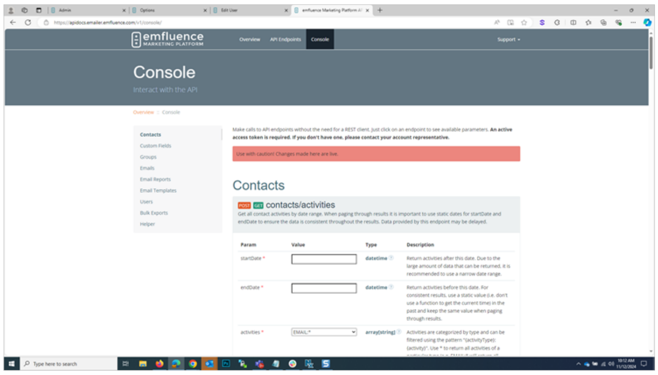
Give the token a title and optional description (emfluence suggests using specific tokens for specific actions to make it easier to diagnose if an issue arises). Make sure to grab the token as this is the ONLY time the full token will be shown in the platform and will be saved encrypted.



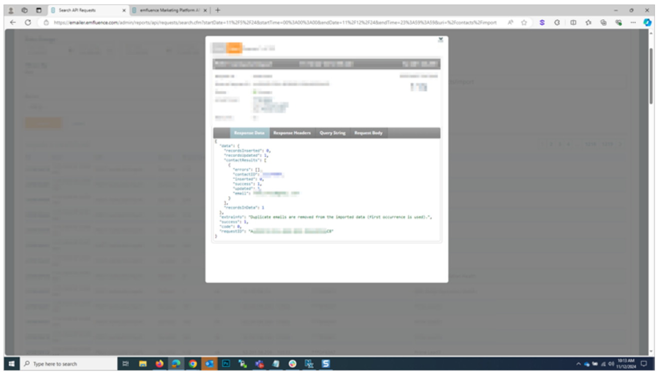
Calls made over the emfluence API can hit a variety of endpoints depending on what data you are trying to import into emfluence or export from emfluence. Make sure your calls match the rules and examples for each endpoint.



The emfluence API Console does allow you to test calls. Be careful in doing so as, if you are importing, you will be making live changes to data within your account.

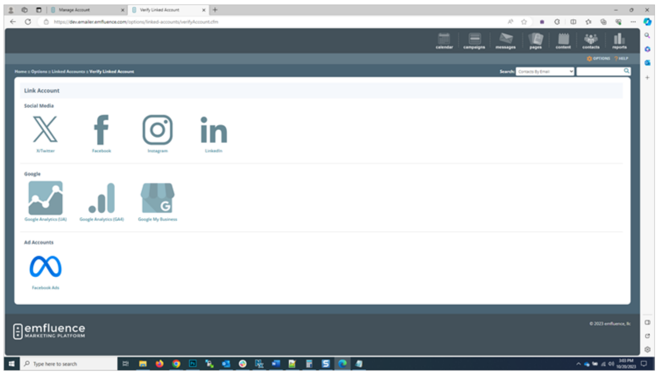


For every call made using the token, emfluence will return a response message. The message will include requestID (a unique identifier for debugging purposes) and either a succes or failure message. On failed calls, further information will be shown under Warnings and Errors.

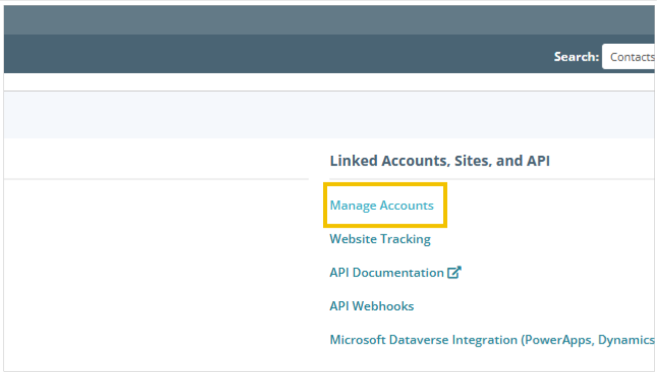


19.13. Manage Linked Accounts

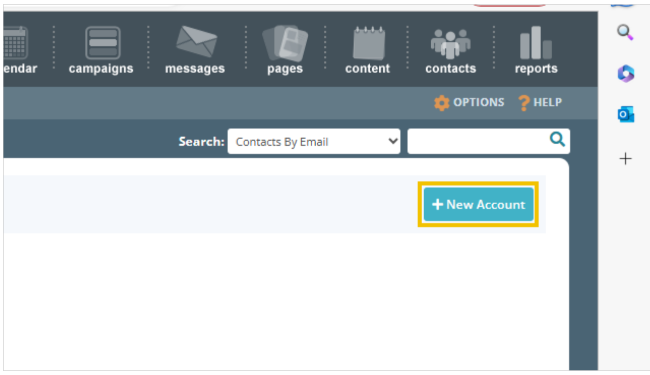
In the Options menu, you can link accounts such as Twitter Profiles, Facebook Pages, LinkedIn Pages, Instagram Business Accounts, Google Analytics, GA4, Facebook Ads, and Google Reviews.



In the **Options** menu, under Linked Accounts, click on the link **Manage Accounts**

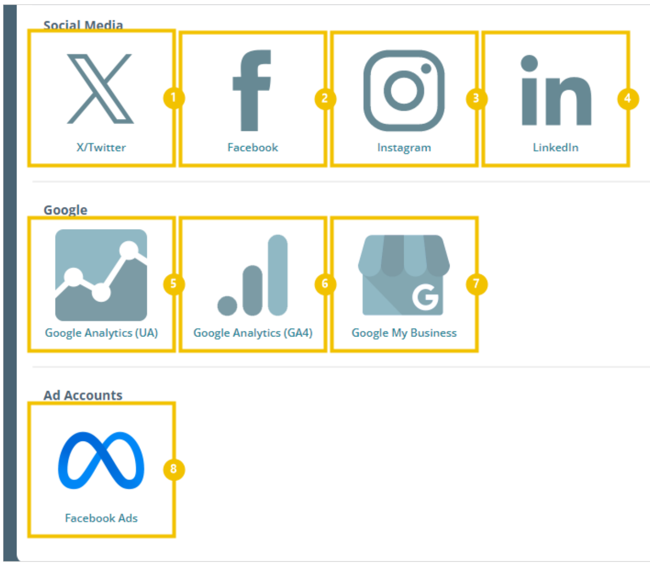


Here you can see and edit any currently connected accounts. To add a new account, click on **New Account**

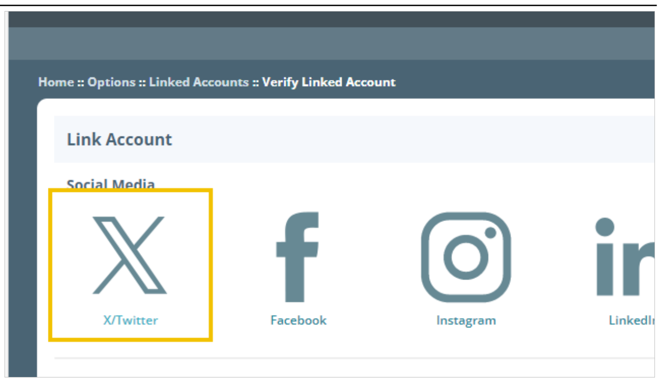


Choose the account you wish to connect. You will need to be logged into that account in order to approve the necessary permissions.

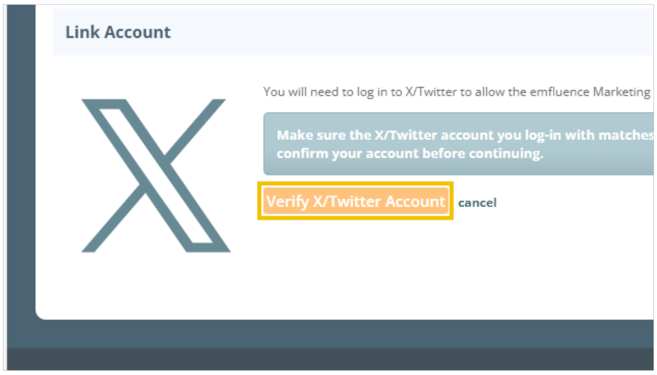
1. **X/Twitter**: Click to connect a X (Twitter) profile
2. **Facebook**: Click to connect a Facebook Page. Because Facebook Pages are owned by users, the prompts will be for your user until the final step where you will confirm a single page you wish to connect.
3. **Instagram**: Click to connect an 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.



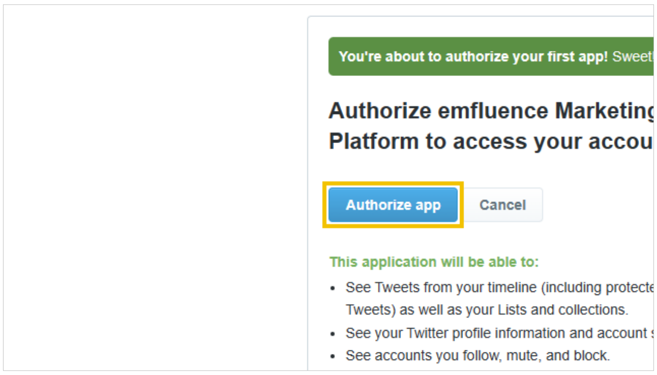
To connect a X (Twitter) account, click on the button **X/Twitter**.



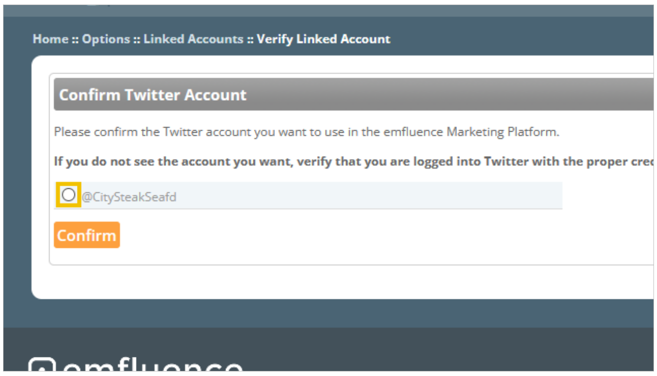
Click on **Verify X/Twitter Account**.



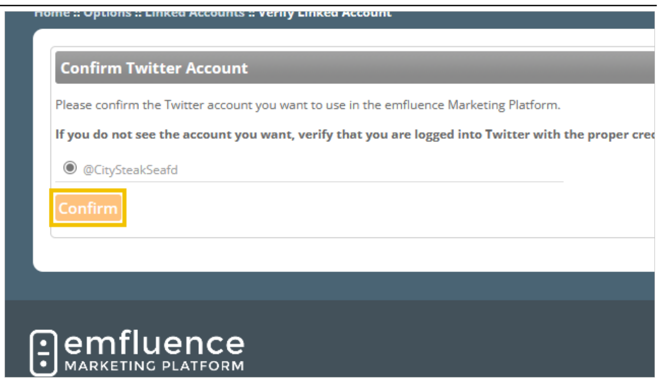
You will need to be logged in to authorize emfluence to connect to your account. If you aren't logged in, you will be prompted to do so. Once logged in, click on the button **Authorize app**



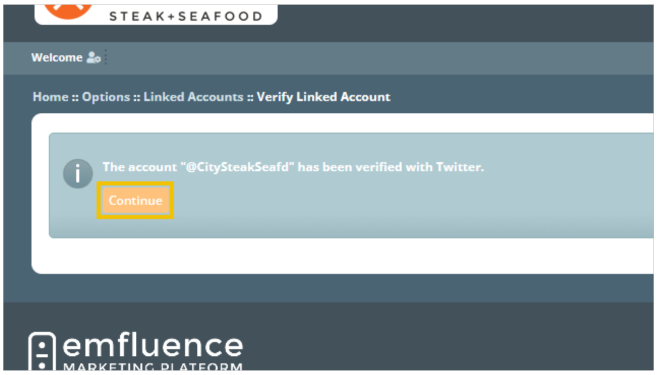
You will be redirected back to emfluence to find all the pages/accounts the user you authenticated has access to. For Twitter, only a single choice will show. For Facebook or LinkedIn, all pages in those accounts will show, and you will click on a single page to finalize your authentication by clicking on the radio button next to your selection.



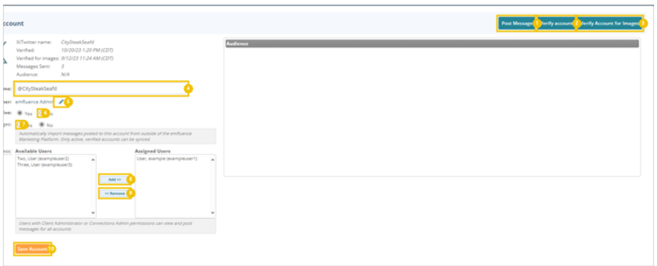
Click on the button **Confirm**



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.

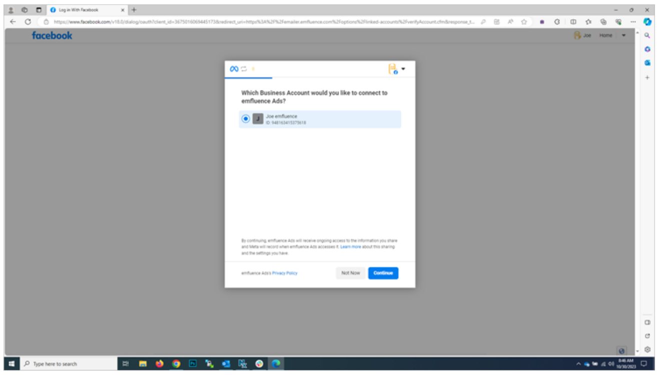


1. **Post Message**: Post new message to this account.
2. **Verify account**: Occasionally you may need to reverify your account because the permission token may expire or the network may have done an update where a new token is required. Click the button and follow the prompts to reverify.
3. **Verify Account for Images (X/Twitter Only)**: X/Twitter requires a secondary verification in order to post messges 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.

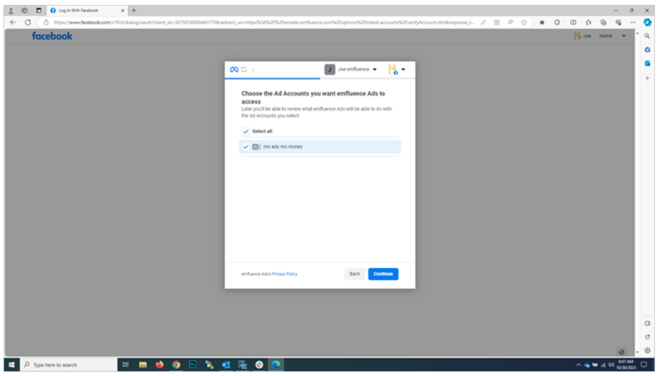
19.14. Connecting Facebook Ad Accounts

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**.

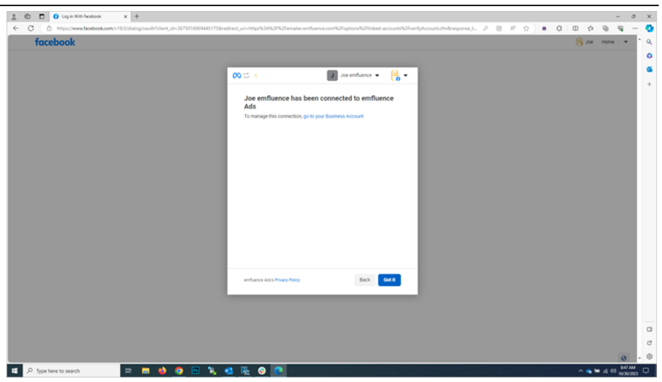
As when connecting to other social accounts, you will need to be logged in to that account in order to walk through the verification steps. Select the account and click Continue.



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.

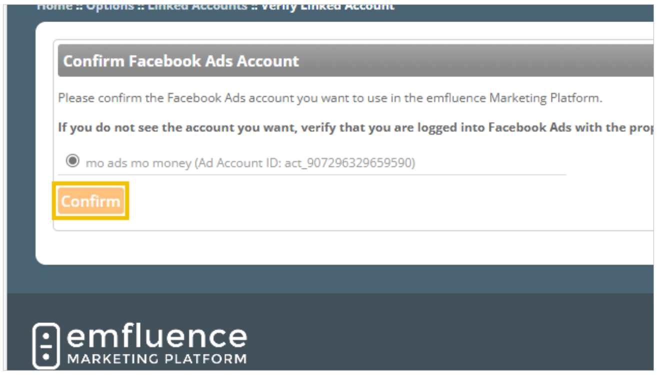


When completing this set up in Facebook you should see confirmation about the connection as well as a link to manage the connection within Facebook. Click Got It to return to emfluence and finalize the connection.



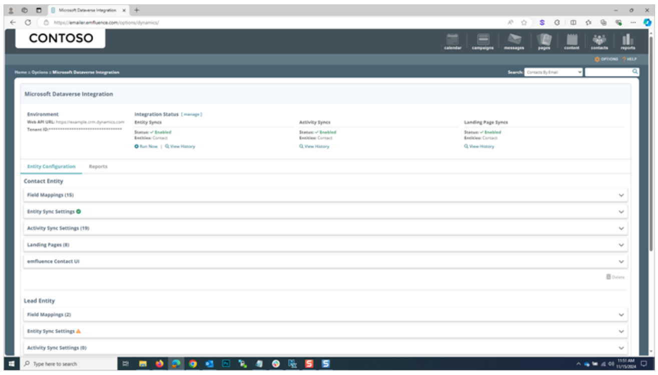
Select the add account from the list provided and click **Confirm** to complete the process.

Now connected, you can create a synced audience and push those contacts to be used in the connected Facebook Ad account.



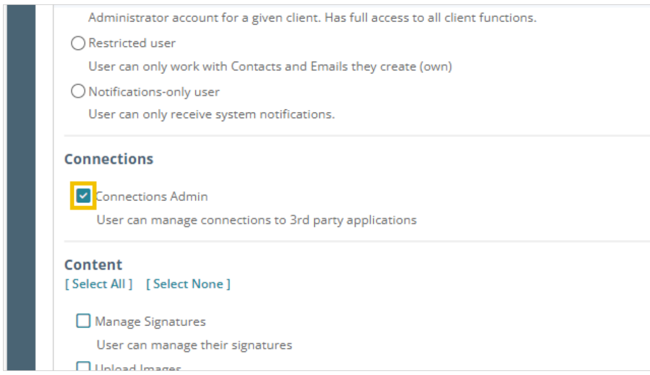
19.15. Dataverse

You can connect Microsoft products such as Dynamics or RapidStart through the use of the Dataverse integration which allows for data to be passed into the emfluence Marketing Platform and metrics to be sent back to the CRM.

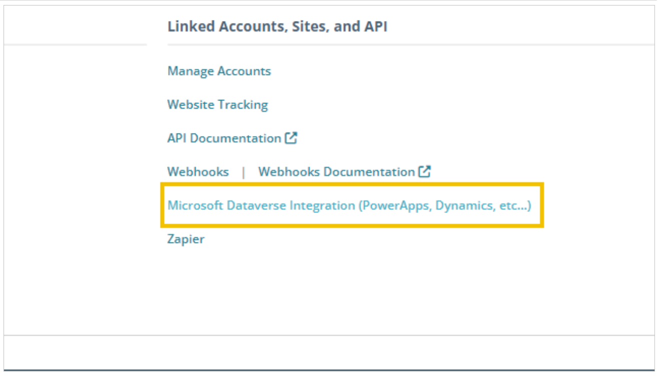


In order to access the Dataverse integration the user must either be a **Client Admin** (who gets all permissions by default) or explicitly have the **Connections Admin** permission. If the user is not a client admin, make sure to also provide contact permissions and group access.

NOTE: The user setting up the integration will be tied to it. We highly recommend giving them full permissions as lack of specific permissions may cause errors in the sync.

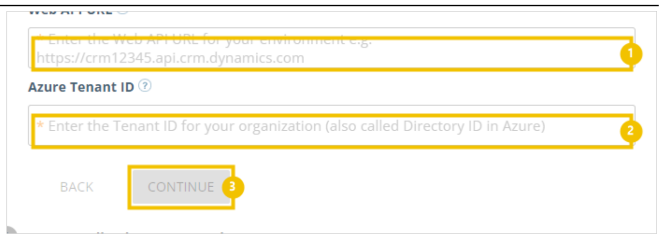


The integration is located in the **Options** menu under **Microsoft Dataverse Integration (PowerApps, Dynamics, etc...)**



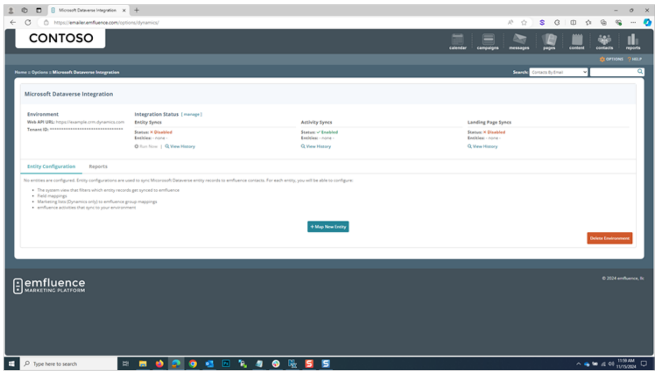
In order to connect, you will need to obtain both the Web API URL and the Azure Tenant ID and confirm the necessary permissions.

1. **Web API URL**: In Dynamics, go to Advanced Settings > Customizations > Developer Resources > Instance Web API > Service Root URL

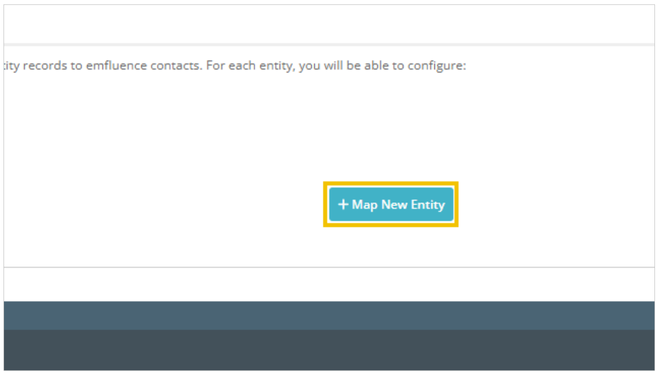


2. **Azure Tenant ID**: In Azure, go to Azure Active Directory > Properties > Directory ID
3. **CONTINUE**: After connecting, consent must be given in Azure, an application user must be set up in Dynamics, and the environment must be saved.

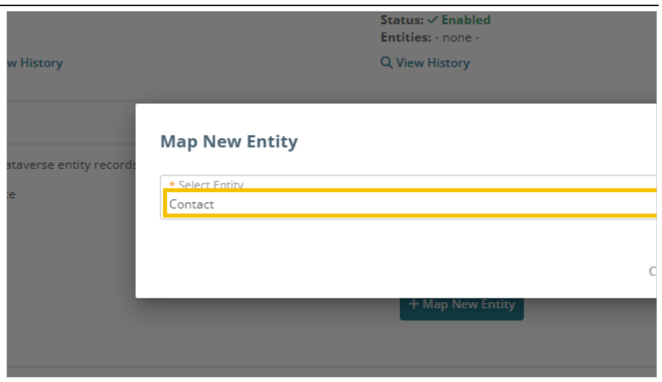
Now created, you will need to start connecting and mapping data in order for it to sync. Every entity, and the fields within each entity, will need to be mapped separately.



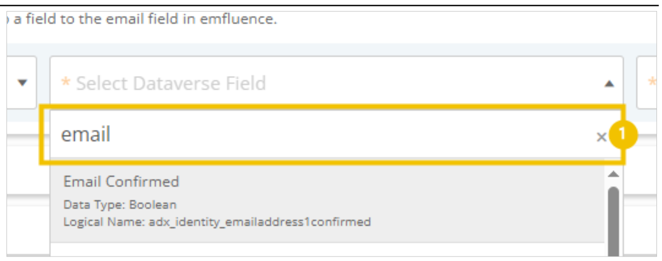
To start, click **Map New Entity** and choose the first entity you wish to map.



From the dropdown, choose the entity you wish to map. You may map more than one entity, but realize all records will become contacts in emfluence.

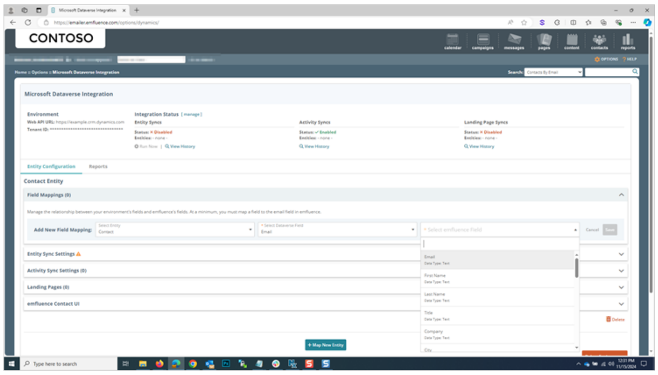


Begin mapping fields for your entity. To start, make sure you map email. We cannot connect a record without an email address so it must be one of the fields mapped for an entity. The first field will default the the primary entity you are mapping. In the second field, find and map the field on that entity you wish to pull in from Dynamics.

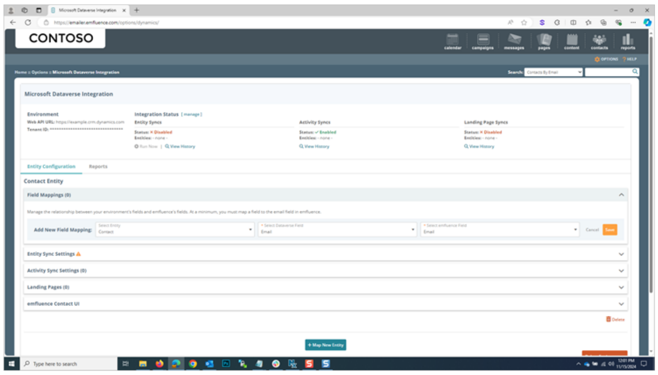


1. **email**: For many fields, Dynamics has several different values. Make sure you map the appropriate field you wish to map. For example, in most cases on Contacts, you would want "emailaddress1" for Email.

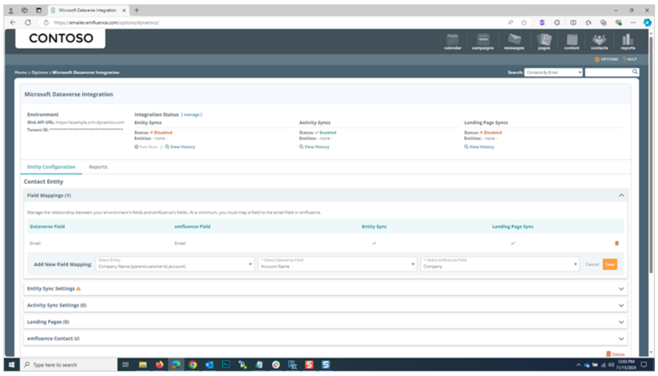
Finally, map the field in emfluence. If you are mapping to a custom field make sure you have created the field before starting the mapping process.



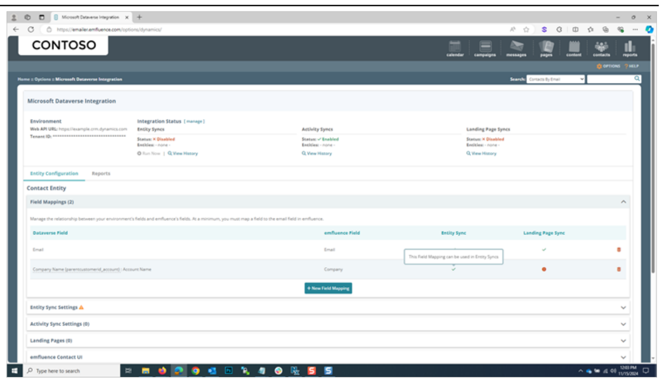
Save your field, and move on to your next mapping.



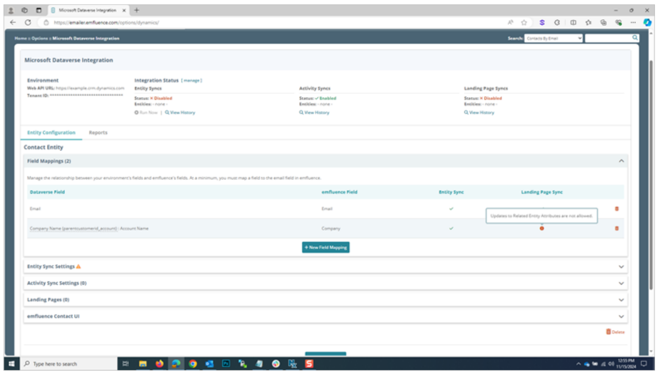
You may also choose to map related fields where available. The most common of these would be mapping Account Name to the Company field in emfluence. Select the related entity, and then the field, and then finally the emfluence field. NOTE: Some types of related fields, such as a lookup, may not be mapped.



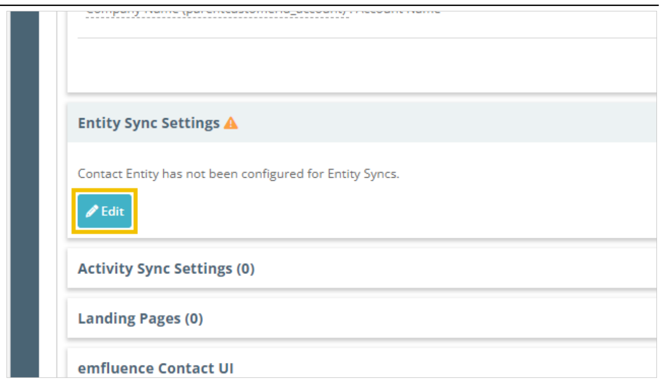
Once mapped you will see if data is allowed between that field to emfluence and whether or not data is allowed from emfluence to Dynamics. A checkmark means data can be connected in that direction. An exclamation means it cannot.



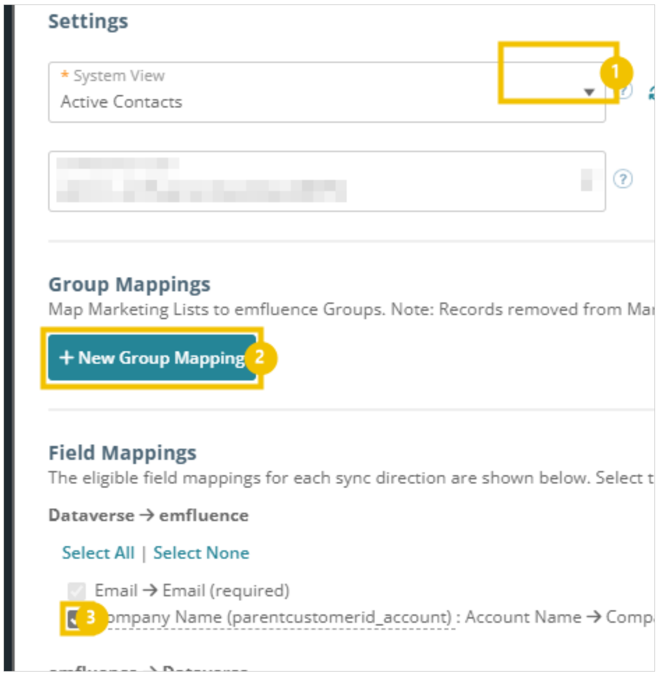
Hovering over any errors will provide a help tip with more information. NOTE: While primary entity fields sent over a landing page entry can be synced to Dynamics (which is the only way emfluence data will overwrite CRM data), related entities cannot be mapped back to Dynamics.



Once your fields are mapped, you then must set up your sync settings. To do so, click on **Edit**.

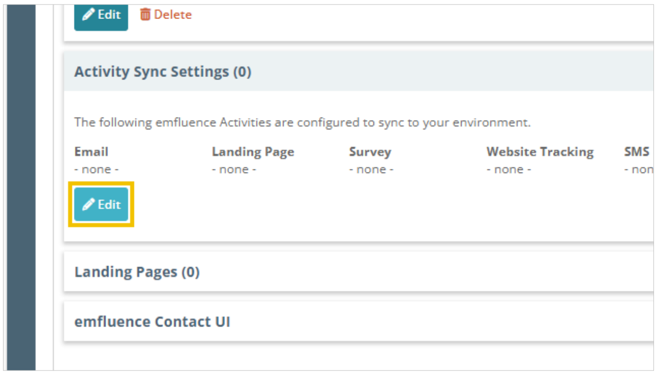


On this page you will set up your system view (which controls what entity records are allowed to sync), add your mappings to the sync, and optionally choose to map Marketing Lists to emfluence Groups.

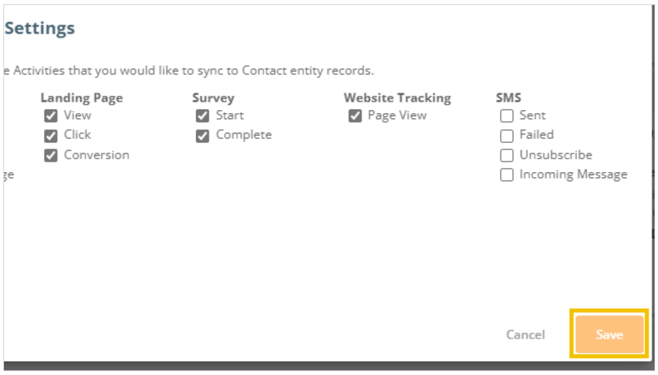


1. **System View**: A system view in Dynamics must be chosen to act as a filter to what records will get passed. Only records matching that view will be synced. We suggest only syncing records which include email addresses to limit errors.
2. **New Group Mapping**: You can choose to map a Marketing List in Dynamics (either static or dynamic) to a Static Group in emfluence. When someone is added to the list in Dynamics (as long as they match the system view) they will be added to the corresponding group in emfluence.
3. **Field Mappings**: Any fields mapped must still be added to the sync. Email will be added by default. For any additional fields, make sure to check the box to add it to the sync list. If you have mapped Held, Suppressed, or Contact Score, those will be found under emfluence to Dataverse and will need to be chosen as well.

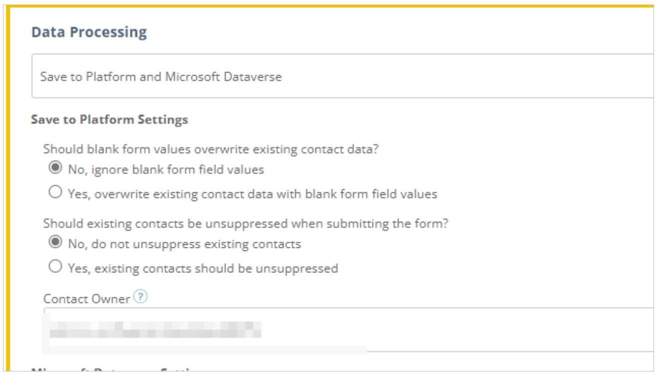
You may also choose to sync emfluence activity records (email views, clicks, etc.) into Dynamics. NOTE: Given the amount of data this will create in Dynamics, you may wish to discuss with your team what data you wish to sync prior to enabling this setting. To add activity syncs, click **Edit**.



Check the boxes for the activities you wish to sync and click **Save**.

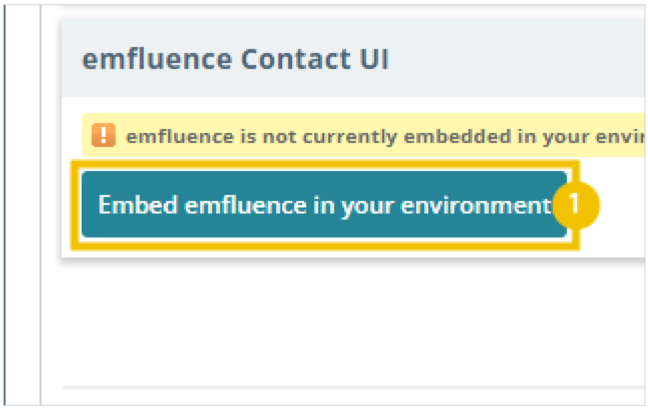


Any landing page and form where you want that data to be sent to Dynamics, needs to be set up to push that data on the landing page's Response Page. Set an entry to both **Save to Platform and Microsoft Dataverse** and then fill in the necessary options of how the data will get added.

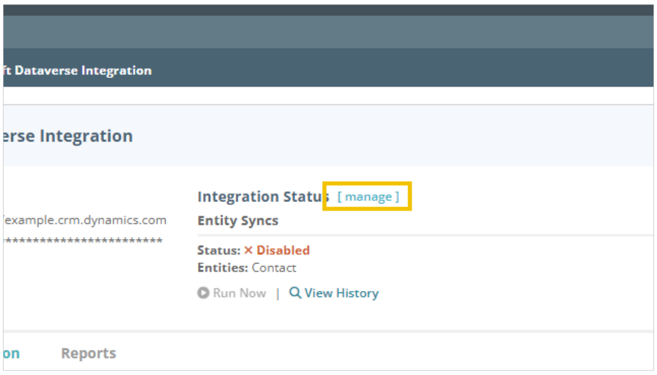


Landing Pages which are set to sync will be shown here. You can also select the setting to embed the emfluence contact UI in to Dynamics.

1. **Embed emfluence in your environment**: Click to embed the conact UI into Dynamics. This will only be visiable on entity records that a synced and only for users who are logged in to emfluence. Options for where ithe UI will be added will be provided.



Your sync, now set up, is still not running. To run the sync, click **manage** at the top of the page.



Here you can enable, or disable, your syncs. NOTE: Some changes to syncs will require you to temporarily disable the integration and then reenable afterwards. Reactivating a sync will cause a full sync to run.