

# Act! Marketing Automation New User Guide

Act! Premium v21  
Version 1.0



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# Welcome

## Using Act! Marketing Automation

Welcome to the Act! Marketing Automation (also referred to as AMA) New User Training Guide. This guide is designed for new users of the Act! Marketing Automation application. During the course of this guide, you will complete a series of lessons. In each lesson, you'll have an opportunity to complete step-by-step exercises within Act! to reinforce what you've learned.



**NOTE:** There is another guide available called the **Act! Marketing Automation Power User Training Guide**. This guide is designed for those users who already have an understanding of the basics of AMA rather than users who are completely new to the product.

## Course Objectives

After completing this course, you will be able to:

- Understand the various tiers of Act! Marketing Automation and what features are included in each tier.
- Create and make use of Landing Pages to assist you in capturing new leads.
- Design both simple and complex email templates to be used in your emarketing campaigns.
- Develop Drip Marketing campaigns ranging from one email blasts to full drip and nurturing campaigns.
- Manage Assets that can be used in your campaigns to measure and compare the engagement of your contacts across your different campaigns.
- Insert more advanced behaviors and actions into your campaigns, including the ability to automatically create Act! Activities and Opportunities.
- Track and monitor your contacts' interactions with your campaigns, as well as report on those interactions.
- Analyze your web activity, including pulling information about the traffic on your own website pages.

## Course Pre-Requisites

This training guide is designed for individuals that have minimal experience using Act!. Prior to beginning this guide, it is assumed that:

- You are comfortable using Windows operating systems.
- You are using a computer with Act! installed, or else have access to an online Act! database.
- You are using either a trial version of Act! Marketing Automation, or else you have paid for one of the available tiers.



**NOTE:** Some features covered in the training are tier specific. These will be identified as they are discussed.

## Document Conventions

Throughout this training guide, pay special attention to these icons:

Icon	Description
	Notes provide supplemental information to the surrounding text.
	References provide locations to additional training material or documentation.
	Tips provide information that may offer an opportunity for additional exploration.
	Warnings provide information that may help prevent potential harm to your system.
	We have a large range of video libraries available. This icon indicates a link to a video library relevant for the current training section.
	Practice means exactly that -- time to stop reading and start doing! Use the Demo database to complete the provided exercise.

# Introduction to Act! Marketing Automation

## Overview

This Lesson will give you an introduction to Act! Marketing Automation. We will discuss why people use AMA, we will learn how to navigate through the various features, and we will also discuss the different tiers of the product that are available.

## Objectives

After completing this lesson, you will be able to:

- Understand the general purpose of Act! Marketing Automation
- State the differences between the three tiers of Act! Marketing Automation
- Locate AMA within Act! and navigate through its features



Please see the video **Take a Tour of Act! Marketing Automation** which contains information relevant for this section of the training:

- <http://training-act.com/act/act-lib-ama/?courseId=overview&videoid=1>

# What is Act! Marketing Automation?

Act! Marketing Automation is a comprehensive marketing platform that sits within Act! Growth Suite. Marketing automation itself refers to the technology or software that allows business to harness the prowess of smart and automated workflows to enhance productivity and deliver better prospect and customer experience. By integrating it with Act! you can get a panoramic view of prospect activity, recognize the hottest leads and prioritize them, deliver a personalized customer experience and generate actionable insight from data to make prudent business decisions. Around 49% of companies are using some form of marketing automation with the numbers increasing every day.

Unlike email automation systems which only offer basic/bulk emailing features, marketing automation tools offer a wide variety of advanced features.

## Act! Marketing Automation Features:

- **Drip Marketing Campaigns** – These advanced or automated email marketing campaigns go a step beyond the conventional email blasts. Using this technique you can send out emails on a schedule; e.g. the first email is sent as soon as a user subscribes, the second is sent 2 days later, another goes out after a fortnight and so on. In addition to this, you can also automate workflows which allow you to send emails depending on certain triggers e.g. when a user subscribes to a service or performs a specific action like opening an email or clicking on a specific link within it.
- **Templates** – Create beautiful, mobile-friendly email campaigns with the interactive template editor where you can customize colors and fonts, and add free, high-quality stock photos from a library of over 500,000 options. Start with one of 170+ sample templates or import and edit your existing HTML templates with the WYSIWYG editor.
- **Landing Page Creation** – Grow your audience with effective lead capture forms and surveys that feed contacts and responses into Act! automatically. Advanced forms and surveys allow further actions in Act!. Notify Act! users and create Act! activities and opportunities automatically as recipients respond.
- **Real-time Metrics** – Understand what's working and how you can improve your marketing strategy over time with real-time metrics covering opens, clicks, and comparative stats per campaign. Individual campaign results automatically push to Act! contact records for a detailed interaction history. Perform A/B tests to pinpoint your most impactful subject lines and content to continually improve the effectiveness of your campaigns.
- **Deliverability & Best Practice Consulting** – Rest-assured your campaigns will reach inboxes, because Act! Marketing Automation is backed by an expert delivery team to help you manage your sender reputation and achieve outstanding delivery rates. Plus, you'll have access to numerous helpful tools for GDPR compliance, spam analysis, managing opt-outs, and so much more.



[https://youtu.be/VMJI\\_P7dO2s](https://youtu.be/VMJI_P7dO2s)

# Act! Growth Suite Tiers

Act! Growth Suite is an all-in-one sales and marketing platform, providing everything you and your team need to successfully run and grow your business. All tiers include a fully featured CRM (Act!) as well as the following features:

## All Act! Growth Suite plans include:

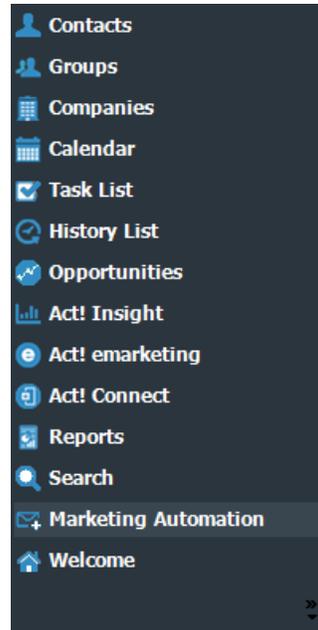
- ✓ Full-featured, everywhere access CRM
- ✓ Powerful Marketing Automation
- ✓ Convenient Act! Companion mobile app
- ✓ Expert technical support<sup>1</sup>
- ✓ Exclusive [Act! Insider](#) membership benefits

There are three tiers of Act! Growth Suite available for subscription. The tier chosen affects the features available in Act! Marketing Automation. You can see a breakdown of those features below:

Professional	<i>Best value!</i> Premier	Ultimate
<ul style="list-style-type: none"> <li>✓ Full-featured <b>CRM</b></li> <li>✓ <b>Essential</b> Marketing Automation:               <ul style="list-style-type: none"> <li>• Interactive template editor</li> <li>• Landing pages &amp; lead capture</li> <li>• Surveys</li> <li>• Drip marketing</li> <li>• Real-time campaign metrics</li> <li>• Marketing calendar</li> </ul> </li> <li>✓ <b>10,000</b> emails/month to unlimited contacts</li> <li>✓ Act! Companion mobile app</li> <li>✓ <b>Standard</b> Support</li> <li>✓ Membership benefits</li> </ul>	<p style="text-align: center;"><b>Everything in Professional, plus:</b></p> <ul style="list-style-type: none"> <li>✓ <b>Complete</b> Marketing Automation:               <ul style="list-style-type: none"> <li>• CRM workflow</li> <li>• Nurture marketing</li> <li>• HTML email editor</li> <li>• Advanced lead capture &amp; surveys</li> <li>• Lead management &amp; scoring</li> <li>• Event marketing</li> <li>• Website activity tracking</li> <li>• Asset tracking</li> </ul> </li> <li>✓ <b>50,000</b> emails/month to unlimited contacts</li> <li>✓ Time-saving <b>Premier</b> Support</li> </ul>	<p style="text-align: center;"><b>Everything in Premier, plus:</b></p> <ul style="list-style-type: none"> <li>✓ <b>Advanced</b> Marketing Automation:               <ul style="list-style-type: none"> <li>• A/B testing</li> <li>• Progressive profiling</li> <li>• Deliverability &amp; marketing consultation</li> </ul> </li> <li>✓ <b>100,000</b> emails/month to unlimited contacts</li> <li>✓ VIP <b>Ultimate</b> Support</li> </ul>

# Accessing Act! Marketing Automation

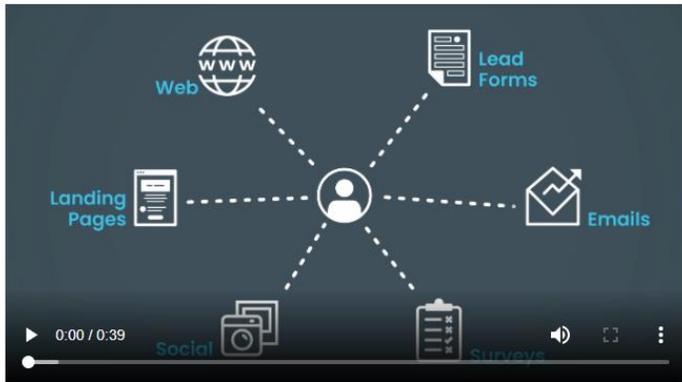
In order to begin using Act! Marketing Automation, you must first access it from within Act! CRM. Firstly, make sure to log into your CRM database. Act! Marketing Automation can then be found within the navigation stackbar on the left:



This should then take you straight into Act! Marketing Automation, into the **Drip Marketing** section. If you see the following screen:

## What is Act! Marketing Automation?

Act! Marketing Automation makes it simple to optimize all the ways you communicate with prospects and customers to maximize engagement and drive business growth. Watch the video to learn more.



The video player shows a central person icon connected by dashed lines to six marketing automation components: Web (globe icon), Lead Forms (document icon), Landing Pages (document icon), Emails (envelope icon), Social (camera icon), and Surveys (clipboard icon). The video player interface includes a play button, a progress bar at 0:00 / 0:39, and volume and full-screen controls.

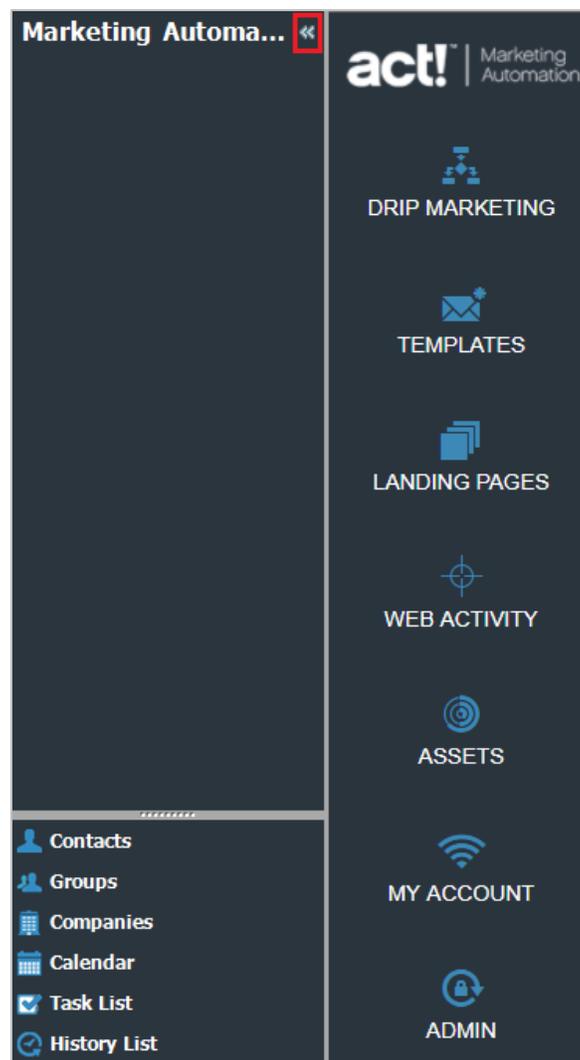
[Try it free](#) [See features](#)

This indicates that you are currently only using Act! CRM and do not have a subscription that includes Act! Marketing Automation.

In this situation, you can either choose to **Try it free**, or if you think this is in error, please get in touch with Swiftpage here: <https://www.act.com/contact-us>

## Navigating Act! Marketing Automation

Now that you have accessed Act! Marketing Automation, you will be provided with a new navigation stackbar:



In order to give yourself more room for working with AMA, you should consider clicking the **double arrow icon** at the top of the screen (highlighted in the screenshot above). This will collapse the regular Act! stackbar providing you with additional space.

The program will open up in the **Drip Marketing** section, so the first thing you will see is a list of any campaigns that you have created or are currently working on.

Whilst the rest of this workbook will delve into each section and the features within in a lot more detail, we will take a brief overview of the available sections below.

## AMA Sections

- **Drip Marketing** – This is where you will actually create your marketing campaigns. You will choose which emails you want to send to your contacts, you will choose when they will be sent out, and who will receive them. You can also configure branching possibilities (so for example, if someone opens the email then do this, if they don't open it then do that), including the ability to automatically schedule activities or opportunities associated with engaged contacts.
- **Templates** – In this section you will create the email templates that you wish to use as part of your marketing campaigns. You can choose from a list of over 170 pre-built templates, then customize them to suit your own business requirements. The intuitive Drag and Drop editor makes it especially easy to create professional looking templates to help keep your contacts engaged.
- **Landing Pages** – Landing pages allow you to create lead capture forms which are an incredibly useful resource in expanding your prospect base. You can choose exactly what information that you want to capture, and link this back to your Act! fields so that anybody who completes your online form will automatically have their details entered into your CRM database.
- **Web Activity** – It is possible to use AMA to track activity on your own websites and see useful metrics within this section. You can view such statistics as the amount of visitors to your website, the amount of interactions that they have had, and perform comparisons on your various web pages to see where the majority of your traffic is being concentrated.
- **Assets** – Whilst you can add PDF files or embed YouTube links within your marketing templates, if you create these resources as assets you can greatly improve your ability to track contact engagement with these asset allowing you to pinpoint your company's most impactful marketing assets. You can view time spent and page visits for each asset, you can compare the effectiveness of the methods you use to drive contacts towards your assets, and you can even implement lead capture forms and force sign-in if contacts wish to continue viewing your assets.
- **My Account** – View details of your account and configure your Email subscriptions, including options for alerts such as when you receive a new lead or one of your contacts opens your campaign emails.
- **Admin** – Perform a number of admin related tasks here including configuring your company address, creating web script in order to track your web activity (discussed above), set up scoring profiles to track your contact engagement, manage your suppression lists (particularly useful if you are moving from another emarketing provider) and more.

# Initial Setup

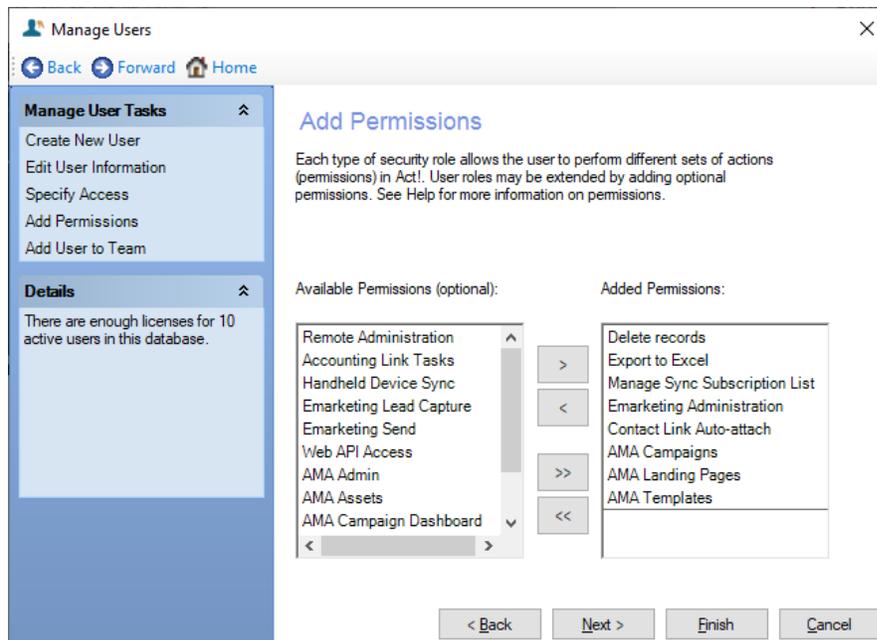
Before you begin using Act! Marketing Automation there are a few settings you should configure as part of the initial setup. This includes configuring your account settings, designing your unsubscribe message, adding your suppression lists and selecting your email subscription preferences. We will cover all of these settings in the sections below.

## Act! Users

The first step you should take when setting up Act! Marketing Automation is to make sure that your Act! users have the appropriate permissions required to access AMA. The program is very flexible and allows you to specify individual levels of permission for each user. For example, User 1 might be given access to the Drip Marketing, Templates and Landing Pages features, whereas user 2 might only be given permission to access Web Activity. Act! Administrators will have access to all areas of AMA as you might expect.

To check and edit the permission of your users, log into Act! as an administrator, then go to **Tools > Manage Users**

Double-click the user that you want to edit, then click **Next** twice to show the **Add Permissions** screen:



**NOTE:** Not all levels of Act! users can have their permissions amended, for example Administrators always have all permissions added automatically. For more information on the different levels of Act! user, please see the following knowledgebase article: <https://help.act.com/hc/en-us/articles/360024239214>

In order to add the desired permissions to the user, click the permission you wish to add from the left hand column, then use the single arrow icon (>) to add this to the user. All Act! Marketing Automation permissions begin with AMA and identify areas of the program that you can give the user access to.



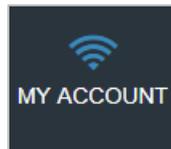
**NOTE:** In order to have any access at all to Act! Marketing Automation, a user **MUST** be given the specific permission **Emarketing Administration**. This does **NOT** mean they will have admin access to the AMA section, this is its own specific permission.

Once you have amended the permissions of the user, click **Finish**.

## My Profile

Now that you have set up your Act! users, each one of them should configure their own AMA profile. This will assist in identifying your various users within AMA itself, and can be useful for troubleshooting if this is ever required. You can also specify individual preferences regarding the notifications you will receive from AMA.

To set up their profile, once each user has logged into Act!, they need to go to the **Marketing Automation** section, and click on **My Account**.



The **My Profile** section contains standard information applicable to the individual user who has logged in. Changing these settings will **NOT** affect your overall AMA account, they are specific to the individual and should therefore be configured individually.

The only required fields are the **User Name**, and the **Email Address**. The name fields are not required, but we would recommend filling them in to make user identification as easy as possible.

The **User Name** field is automatically assigned and cannot be changed. This is a unique identifier that the tech support team may ask for if you ever require any help in using the software.

The **Email Address** is used for receiving notifications (discussed below).

If you do make any changes, click the **Actions** menu in the top right corner, and choose **Save**.

My Profile
Actions ▾

---

User Name A4GN0T0Z00BB3XWU8GHT3V185Z-d9f1f04c-ea37-4608-ba19-49ea36e162e5

Email Address

First Name

Last Name

Website

Phone

Towards the bottom of this section is a tab for **Email Subscriptions**. It is here that you can configure (again on an individual basis), what notifications you would like to receive from AMA.

Email Subscriptions

- Accounting Alerts
- Leads Alerts
- Daily Campaign Summary
- Daily Flash Summary
- Daily Web Summary
- Email Open Alerts
- Email Click Alerts
- Web Account Alerts
- Web Lead Alerts

The alerts available can be broken down as follows:

- **Accounting Alerts:** This is a legacy option that is no longer in use and will soon be removed from the software.
- **Leads Alerts:** If a new lead is captured via a cookie or AMA form completion, an alert will be sent containing the email address of the new lead.
- **Daily Campaign Summary:** Each morning, AMA will create an asset summary report. If you are using AMA to store your marketing assets in a PDF or YouTube format, then AMA will send you a summary of all impressions to that asset.
- **Daily Flash Summary:** Each morning, AMA will create a "Flash" report that will detail your personal interactions with marketing related activities. The Flash report contains data

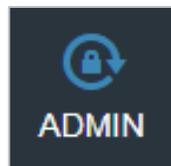
from the Outlook or Gmail Plug-in, such as opens, clicks, and document engagement. It also contains anonymous website visitor activity.

- **Daily Web Summary:** Each morning, AMA will create a report detailing all web activity for that previous day. This will include unknown and known visitors to your website.
- **Email Open Alerts:** Email open alerts are alerts generated from the Outlook or Gmail plug-in. When you create a one-to-one email using the plug-ins, the open alerts will notify you instantly when your recipient opens the email. If your recipient opens the email more than once in an 8 hour period, you will only be notified once. It will be suppressed for 8 hours. After 8 hours, the suppression is lifted and you will be notified on the next open.
- **Email Click Alerts:** Email click alerts are alerts generated from the Outlook or Gmail plug-in. When you create a one-to-one email using the plug-ins, the open alerts will notify you instantly when your recipient opens the email. If your recipient opens the email more than once in an 8 hour period, you will only be notified once. It will be suppressed for 8 hours. After 8 hours, the suppression is lifted and you will be notified on the next open.
- **Web Account Alerts:** Web account alerts are generated from your website activity. These alerts are generated from "unknown" recipients. AMA will attempt to translate the IP address to a known company. It will also determine the city, state, and country of origin. \*Please note that the organization name translation is only about 18% accurate due to the number of recipients coming from unknown IP addresses.
- **Web Lead Alerts:** Web lead alerts are alerts generated from your website activity. These are similar to Web Account Alerts, however, the recipient was cooked by an email open, click, or form submission. In this case, this alert is from a known lead. If the lead exists in your Act! CRM database, then this information will be recorded back to the history record.

Once again, if you make any changes to your preferences here, click the **Actions** menu in the top right corner, and choose **Save**

## Account Configuration

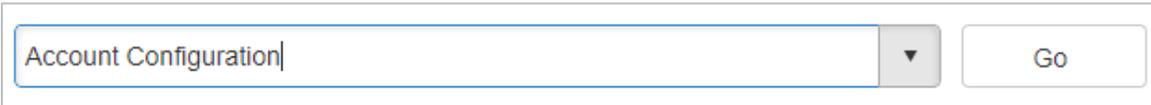
When sending your marketing campaigns it is important that your contacts know who the emails have come from. You can access these settings by clicking the **Admin** option in the navigation stackbar:



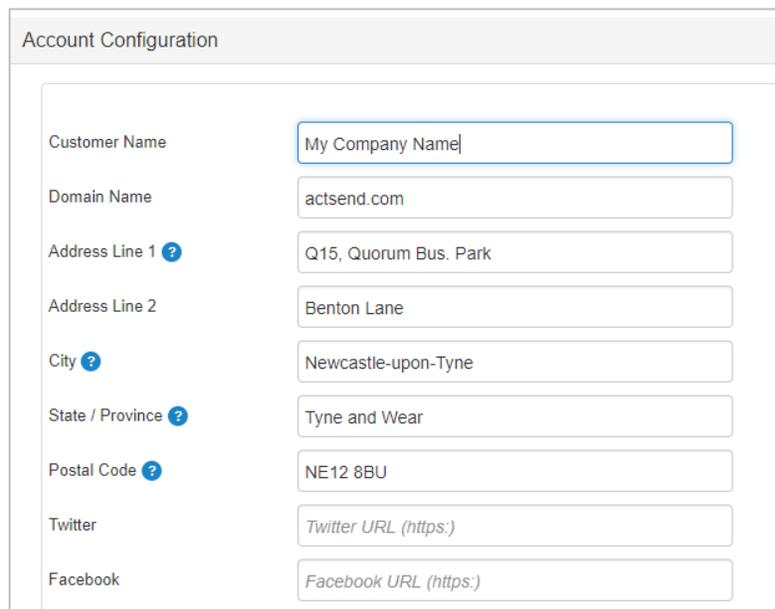
**NOTE:** You must be an AMA Administrator in order to access this section.

At the top of the screen there is a large dropdown menu that provides a list of functions you can perform within the admin tool. Choose the **Account Configuration** option and click **Go**.

The fields listed are required fields and are referenced in the footers of email templates you create. It is a legal requirement for all email marketing companies to include both the option to unsubscribe, and their company details within any emails that are sent. Act! Marketing Automation keeps you compliant with that legal requirement by adding these options to the footer of all email templates automatically. This section allows you to specify exactly what information will be seen in those footers.



A screenshot of a web interface showing a dropdown menu with the text "Account Configuration" and a downward arrow. To the right of the dropdown is a button labeled "Go".



A screenshot of the "Account Configuration" form. The form contains the following fields and values:

Field	Value
Customer Name	My Company Name
Domain Name	actsend.com
Address Line 1	Q15, Quorum Bus. Park
Address Line 2	Benton Lane
City	Newcastle-upon-Tyne
State / Province	Tyne and Wear
Postal Code	NE12 8BU
Twitter	Twitter URL (https:)
Facebook	Facebook URL (https:)

1. **Customer Name** – This is where you can enter your company name.
2. **Domain Name** – This field shows the domain that your sent emails will come from. The field will already be filled in and should not be changed, any changes made will not save.



**NOTE:** Most accounts will have a value here of **actsend.com**. This can be due to several reasons. Firstly, trial accounts will always send from this domain. Secondly, when you initially set up your subscription with the Swiftpage sales team, they will have asked for the domain you wished to use. If you did not choose your own domain, then actsend.com is used instead. Finally, if you use a public domain email address (Hotmail, Gmail Yahoo etc.), you will not be able to use that through an emarketing platform and will use actsend.com instead.

3. **Address Fields** – These fields are required and are used for merge tags in your template footers (merge tags and footers will be explored later in the training)
4. **Email Redirect Settings** – These three entries will already be filled out for you. **DO NOT EDIT OR DELETE THESE.** These are your DNS settings that allow Swiftpage to track your email, landing page and asset activity. These entries were added by an Act! Marketing Automation team member upon the creation and setup of your account. Changing these entries will result in failure to send or track emails and load landing pages and assets.

Email Redirect Settings	
* URL for Click Tracking	<input type="text" value="https://click.swiftpage.marketing"/>
* URL for Landing Pages	<input type="text" value="https://pages.swiftpage.marketing"/>
* URL for Document Tracking	<input type="text" value="http://viewer.swiftpage.marketing"/>

## Unsubscribe Designer

As previously mentioned, it is a legal requirement to provide an unsubscribe option on all of your emarketing communications. When your contacts click this option, they will be redirected to a web page which you can configure the look and feel of.



**NOTE:** If a contact chooses to unsubscribe, their record in Act! Will be updated to reflect this, and they will automatically be added to your suppression list. This is to ensure that you cannot accidentally send them any future emarketing communications.

To access the Unsubscribe Designer, make sure you are still in the **Admin** section, choose **Unsubscribe Designer** from the dropdown list and click **Go**.

The screenshot shows a search bar with a dropdown menu open. The menu items are: Account Configuration, Act! History Sync, Research and Anonymization, Email Transactional Data, Jobs, Scoring, Suppression Lists - Email, Suppression Lists - Email Domains, Suppression Lists - Web, Pages, Alerts, **Unsubscribe Designer** (highlighted), Users, and Web Script. A 'Go' button is visible to the right of the search bar.

The Unsubscribe Designer has several sections that you can complete:

- The **Unsubscribe Header** represents what will appear before the unsubscribe button

- The **Unsubscribe Header** will occur below the unsubscribe button.

A typical unsubscribe page might have a header that reads “Are you sure that you want to unsubscribe?” and the footer might contain a list of all the information the contact will miss out on if they choose to continue.

The screenshot displays the Act! Marketing Automation designer interface. At the top, there is a section titled "Unsubscribe Header" which contains the Act! Growth Suite logo and the text "Are you sure you want to unsubscribe?". Below this section is a design toolbar with various icons for editing and adding elements. At the bottom, there is a section titled "Unsubscribe Footer" which contains the text "Subscribers receive the latest offers as soon as they are available such as:". The interface also shows tabs for "Design", "HTML", and "Preview", and a "RemoveElement" link.

The menu bar that runs immediately beneath “Unsubscribe Header” includes a number of tools allowing you to customize your design further including the ability to add in **pictures** (such as your company logo), or **tables**.



**NOTE:** This unsubscribe page is a global unsubscribe, so will unsubscribe all recipients who complete this page from **ALL** emails sent from Act! Marketing Automation. It will do so automatically so there are no extra steps you need to take to make sure these leads/contacts no longer receive emails.

Once you are satisfied with your design, scroll to the bottom of the designer and click the **Save** button:

Save

## Suppression List



**NOTE:** If you are completely new to emarketing and do not have an existing suppression list, you can skip this section. However, if you have **EVER** used any form of emarketing software, you need to import the details of any contacts who unsubscribed into Act! Marketing Automation.

Any company or individual that has an email marketing policy will inevitably accrue a list of contacts that have either chosen to unsubscribe from their emails, or who are no longer using the email address that you have for them on your system. These email addresses need to be added to your suppression list in Act! Marketing Automation. This is particularly important as moving to a new email marketing platform does not mean you can discount any previous unsubscribe notifications.

In order to easily import your suppression list into AMA, you need to have them in an appropriate file format, in this case a .CSV file. If you have an Excel spreadsheet, you can save this as a .CSV file simply by going to **File > Save As > CSV (Comma Delimited)**.



**NOTE:** If you have lists of email addresses that have unsubscribed, email addresses that have bounced and email addresses that have complained you will need a separate spreadsheet for each of these three reasons.

The spreadsheet needs to have only **one column** which will contain all of the email addresses in your suppression list.

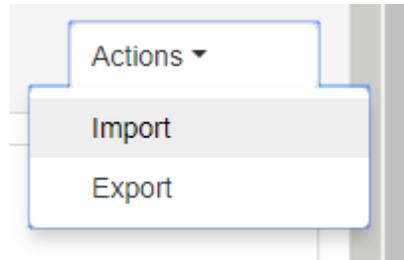
	A	B	C
1	Email Addresses		
2	Test1@test.com		
3	Test2@test.com		
4	Test3@test.com		
5	Test4@test.com		
6	Test5@test.com		
7	Test6@test.com		
8	Test7@test.com		



**NOTE:** The name of the spreadsheet is not relevant. Also, the column header is not needed as well, though it will make no difference if you do choose to include it as in the screenshot above.

Once your spreadsheet has been prepared for import, make sure you are still in the **Admin** section of Act! Marketing Automation, and choose the option for **Suppression Lists – Email** in the dropdown list. Click **Go** to proceed.

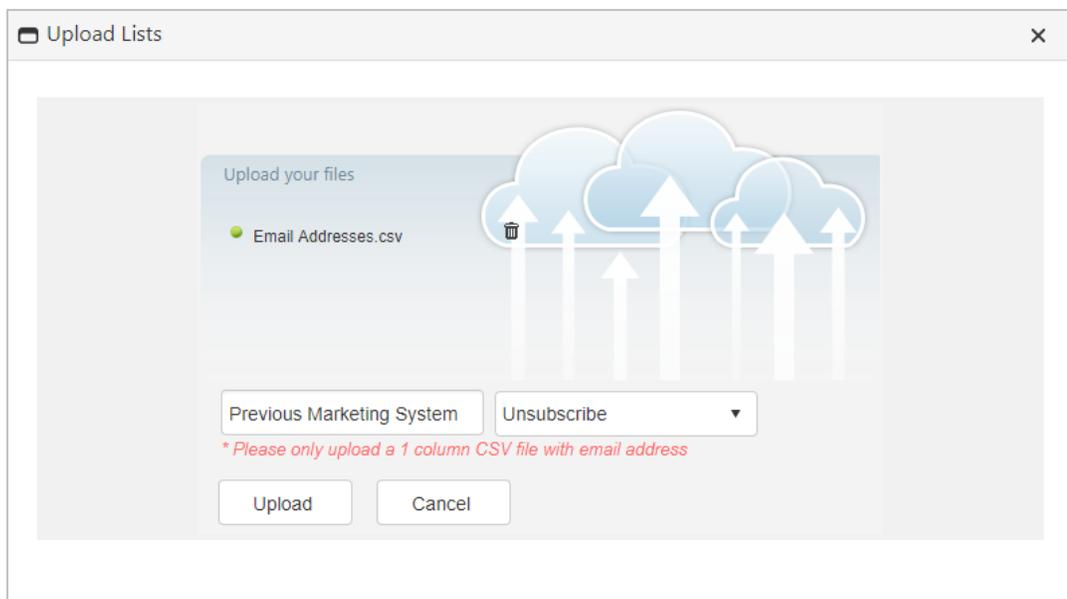
To import your spreadsheet, click the **Actions** dropdown menu in the top right corner, and choose the option to **Import**:



Click the **Select** button, and browse to the .CSV file that you would like to import.

In the **Please Enter a Source** field, you should enter where these email addresses came from. This is so if you ever need to review your suppression list, you will easily be able to tell why those addresses have been added.

In the final dropdown field, choose whether the spreadsheet you are importing are email addresses that have **Unsubscribed**, **Bounced** or **Complained**. Remember that if you have email addresses from multiple categories, you will have to upload these as separate spreadsheets in order to capture this information accurately.



Click the **Upload** button once you are happy to proceed. You will then receive a message advising you that you will receive an email once the process is complete, however for smaller files this should only take a matter of minutes.

Once this has been completed, you will see the email addresses you imported listed.

Manage Email Suppression List		
<input type="text" value="Email Address Filter"/> <input type="button" value="Refresh"/>		
Email Address ▲	Code	Source
✘ testing10@testing.com	Unsubscribe	Previous Marketing System
✘ testing2@testing.com	Unsubscribe	Previous Marketing System
✘ testing3@testing.com	Unsubscribe	Previous Marketing System
✘ testing4@testing.com	Unsubscribe	Previous Marketing System
✘ testing5@testing.com	Unsubscribe	Previous Marketing System
✘ testing6@testing.com	Unsubscribe	Previous Marketing System
✘ testing7@testing.com	Unsubscribe	Previous Marketing System
✘ testing8@testing.com	Unsubscribe	Previous Marketing System
✘ testing9@testing.com	Unsubscribe	Previous Marketing System

# Summary

In this lesson you have learned:

- What AMA is and the Growth Suite tiers that are available.
- How to navigate the AMA section of Growth Suite.
- How to perform the initial setup including configuring your Act! Users, individual preferences, and your mail merge fields.
- Why configuring your unsubscribe page is so important and how to do this.
- What a suppression list is and how to add this to AMA

# Checking Your Knowledge

Practice 



**NOTE:** Whenever you make any changes to your Act! Marketing Automation account (for example, configuring your unsubscribe designer, importing your suppression list, creating any landing pages, templates, campaigns etc.) these changes will be visible in **ALL** of your Act! databases. This is extremely useful as it means that if you have multiple databases, you do not have to keep separate lists of useful AMA templates or campaigns etc. However, it does mean you must be very careful when practicing using the program. When following any of the exercises in this guide, please make sure to remember that any changes you make will potentially affect any of your future campaigns.

Having completed this lesson, check your knowledge by answering the following questions or performing the following tasks:

## Act! Users

1. Browse to **Tools > Manage Users**
2. If applicable, add AMA permissions to any of your Act! users that will need to access this feature.

## My Account

1. Have each user log into Growth Suite and browse to **Marketing Automation > My Account**.
2. Add in the profile information, and make sure under **Email Subscriptions** that each user checks the boxes of items they would like to receive.

## Account Configuration

1. As the AMA administrator, go into **Admin** section, and choose **Account Configuration** from the dropdown list, then click **Go**.
2. Fill in all of your company details here.

## Unsubscribe Designer

1. Navigate to the **Unsubscribe Designer** via the drop down along the top of the Admin page, then click **Go**.
2. Customize the **header of your page** by adding your **company logo** and a **brief message** letting your future recipients know that they are about to unsubscribe.
3. Customize the **footer of the page** by adding a description of what exactly they will be unsubscribing from.
4. **Save** your changes.

## Optional: Suppression List

If you have migrated to AMA from another marketing platform, you **MUST** add in your suppression list (unsubscribes, bounces etc.) from that platform. Follow the instructions covered earlier in the lesson.

# Landing Pages

## Overview

In this lesson, we will learn how to create and edit Landing Pages. We will discuss what they are and how they can be used to increase your prospects base. We will also see how this fits into Act! marketing Automation as a whole.

## Objectives

After completing this lesson, you will be able to:

- Create a Landing Page complete with appropriate questions to gather contact information
- Customize the skin of the Landing page
- Understand the effects caused within the Act! database when a contact completes the Landing Page form.



Please see the video library **Landing Pages** which contains information relevant for this section of the training: <http://training-act.com/act/act-lib-ama/?courseId=landingpages&>

# What is a Landing Page in Act! Marketing Automation?

A Landing Page is an online web form that contacts can use to register their interest in your business. Once set up, any time a contact completes your web form their contact details will be automatically sent directly to your Act! database without any further interaction from yourself. This is an extremely useful feature when it comes to building your customer base as it will help you to locate and then market to brand new prospects.



**NOTE:** The contact details will be sent to the Act! database you were using when you created the Landing Page. It is important to keep track of this when creating your Landing Pages, perhaps by using the database name as part of the Landing Page name.

Landing Pages are fully customizable in terms of the questions you would like to ask (i.e. the data that you want to pull directly into Act!) as well as the look of the form itself (i.e. you can change colors, fonts, add pictures etc.).

Once your Landing Page has been created, you will be provided with an automatically generated URL. This URL can then be added anywhere you like in order to attract new prospects. For example, you might choose to add it to your website, you might add it to your social media accounts, or you might have it open on a laptop at a trade show.

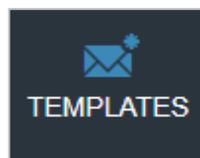
This lesson will look at creating a Landing Page, and show what happens when a contact completes the created form.

## Landing Page Creation

### Creating a Template/Skin

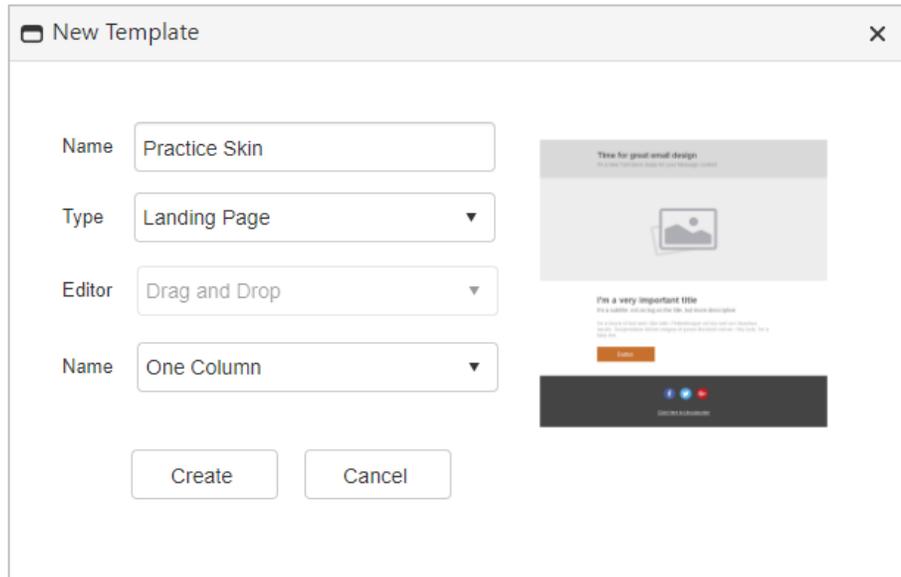
Before creating the form that contacts will actually complete, it is best to create a template or skin that will determine how the landing page actually looks. This allows you to customize the colors used, add in your own company logo and more. You can then use this skin on any Landing Pages that you create now or in the future.

To begin, go to the Act! Marketing Automation section, and click the **Templates** section.



Click the **Actions** menu in the top right corner, and choose **New Template**.

Complete the fields that are shown:



The screenshot shows a 'New Template' dialog box. It has a title bar with a close button. The dialog contains four input fields: 'Name' (Practice Skin), 'Type' (Landing Page), 'Editor' (Drag and Drop), and 'Name' (One Column). Below these fields are 'Create' and 'Cancel' buttons. To the right of the fields is a preview of a landing page template. The preview shows a header with the text 'Time for great email design', a main content area with a placeholder image, a title 'It's a very important title', a description, a 'Learn' button, and a footer with social media icons.

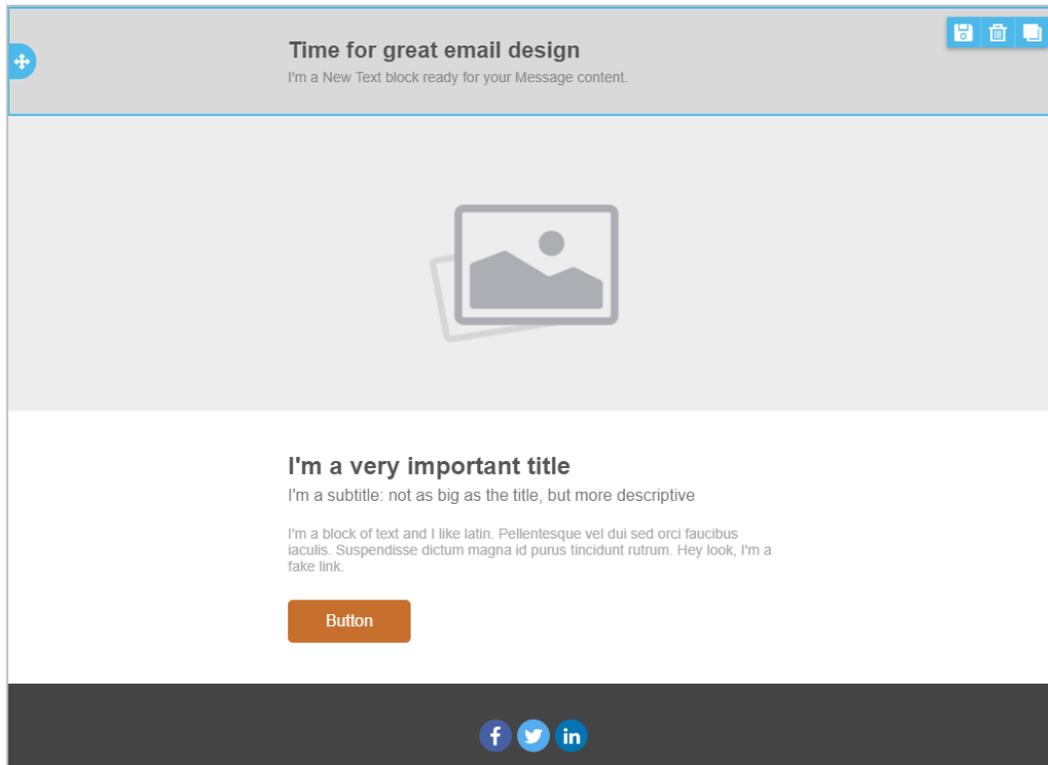
- **Name:** Add in a name for your skin so that you can easily identify it amongst any others you might create.
- **Type:** Make sure to choose **Landing Page** here. We will look at the other types of templates in a later section of the training guide.
- **Editor:** When creating a Landing page template, you will not be able to change this field. Again we will look at the editors available when editing other templates later in the training guide.
- **Name:** This field allows you to choose from over 150 pre-built templates in order to give you a head start with your designs. These are primarily designed for use with emarketing templates, so we would recommend at least beginning your Landing Page skin with the default **One Column** template.

Click **Create** when ready.

## Template Designer

The template designer is where you will customize the actual look and feel of your Landing Page. The editor used for Landing Page templates is the **Drag and Drop** editor. This same editor is used when designing emarketing templates as well, and has a huge range of functionality. We will discuss this functionality in far greater detail later in the training guide, for now our Landing Page skin will be quite a simple design in order to get you up and running quickly. Once you have completed the Templates section of this training, you can always return to your Landing Page skin and make further changes if you wish.

Now that you are in the template editor, your basic template will look like this:

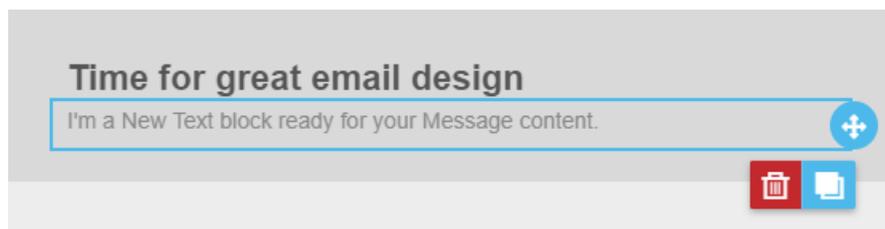


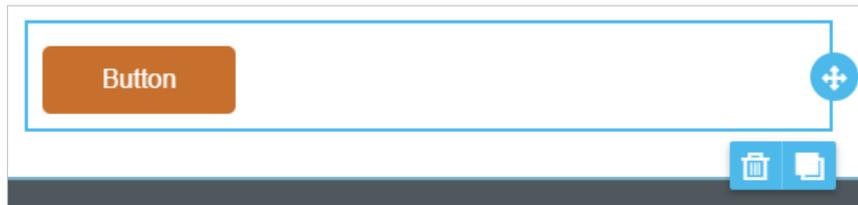
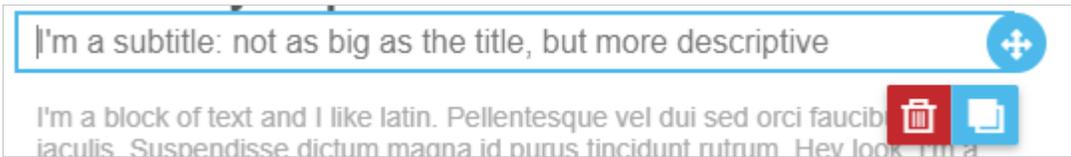
The basic premise of the Drag and Drop editor is that the template consists of a number of blocks. As you move your mouse across the template, you will notice these blocks are highlighted. Each block will have some content within it, this might be text, it could be an image or a button etc. You can drag and drop new rows, blocks or content onto your template wherever you would like, and you can remove rows, blocks and content too. In this way, you will build up the design of your template.

You can also edit any of the content by simply clicking on it, then make any of the changes required. So for example, if you want to change the title at the top of the screen, simply click on it, delete the current title and type in your own.

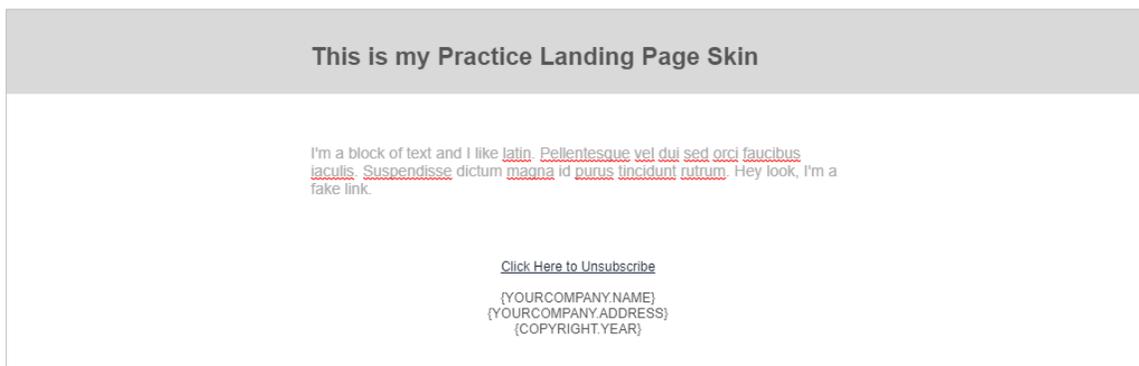
As mentioned earlier, we will cover the functionality of the editors later in the training. For now we will create a simple Landing Page template.

Initially we will delete some of the content that we will not need. Whenever you click on a content block, you will see a small trash can icon. Clicking this will allow you to delete that content. You can do the same for a whole row as highlighted in the screenshots below:





Once you have completed these amendments, your template should look similar to this:



The row that you can see in the screenshot is used to provide an Unsubscribe option in your templates, as well as provide your company details so the contacts know who is getting in touch. As previously mentioned, it is mandatory to include this in any of your marketing emails. However, as this template is for a Landing Page, these options are not required and the row can be deleted.

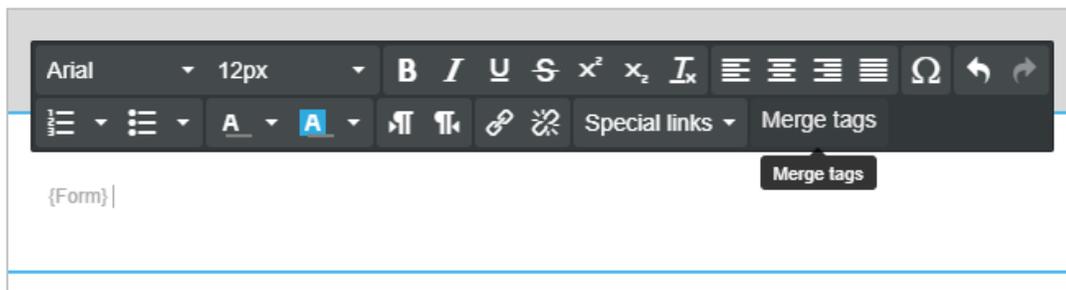


**NOTE:** Whilst the Unsubscribe option is certainly unnecessary (as the contacts will not have subscribed yet anyway), it is a good idea to include company information on your template so that contacts will feel more at ease completing the form for a company they are aware of and trust. Because of this, make sure to **REPLACE** the bracketed information with your own company details.

At this point our basic skin is almost complete. The last step is to add a **Merge tag** for a **Form**. This tag is what will allow us to embed the actual questions within the template so it is absolutely vital to add to your template.

To add the Form Merge tag:

1. Click on the block of text remaining on the template, and delete all of the information in it.
2. Click the **Merge** option from the menu, and choose **Form**.

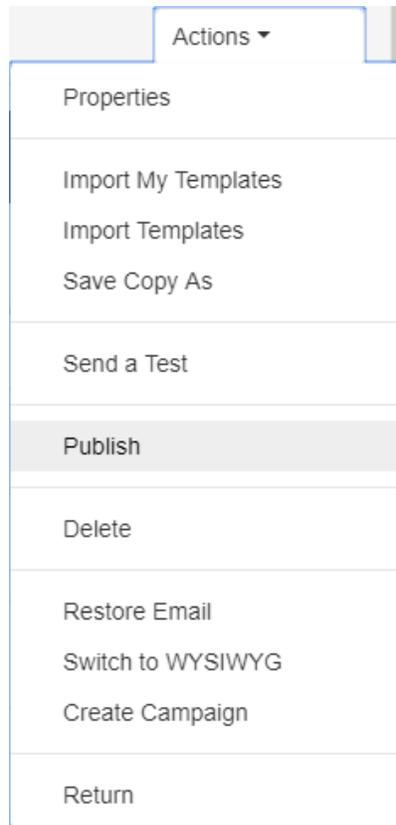


Once you have done this the template is now complete, so make sure to click **Save** in the top right corner.

**\*\*IMPORTANT\*\***

There is one final step you need to take in order to actually use the template that you have created, and that is to **Publish** the template. Saving the template is not enough, you must also publish it to make it available for use.

To publish your template, click on the **Actions** menu in the top right corner, and choose **Publish**.



When asked if you are sure you wish to publish your template, click **Publish** once more to confirm. You will then receive a message letting you know the template has been published successfully.

To exit the editor, click the **Actions** menu, and click **Return**.

## Creating the Landing Page Itself



**NOTE:** When a contact completes a Landing Page webform, their details will automatically be sent to the Act! database you were using when you created the Landing Page. It is important to keep track of this when creating your Landing Pages, perhaps by using the database name as part of the Landing Page name.

Now that you have created your skin, you are ready to create the form itself. This form will consist of fields for the contacts to complete in order to provide their information to you. This information will then be passed back to your Act! database automatically, thereby providing you with a brand new prospect that you can begin marketing to.

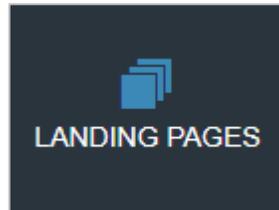


**NOTE:** We will be mapping fields from the Landing Page to our Act! database. Because of this, in the example covered below we have created two custom fields within the Act! database, a **Character** field named **Product of Interest**, and a **Yes/No** field called **GDPR Permission Received**. If you wish to follow this example, either use spare fields in your database (User 1 to User 10 are typically spare fields) or else create the fields mentioned yourself. For more information on creating fields and amending layouts, please see the video library here:



[http://training-act.com/act/act-lib-prem/?courseId=fields\\_and\\_layouts&](http://training-act.com/act/act-lib-prem/?courseId=fields_and_layouts&) .

To begin creating the form, click on the **Landing Pages** section of Act! Marketing Automation.



Click the **Actions** menu in the top right corner and choose **New Page**.

Complete the fields as shown:

Create New Page

*Page Name*

*Smart Tags*

*Page Type*

*Select Skin*

*Notifications*

Enter a list of email addresses that you want to be instantly notified after the completion of a form.

*Auto-Response*

After completion of a page, the recipient can be placed into an email campaign. For instance, you may want to send a 'Thanks you for registering' response. This is optional.

*Allow Duplicates*

Allowing duplicates will always create a new record. If you do not allow duplicates, then it will dedup against the email address.

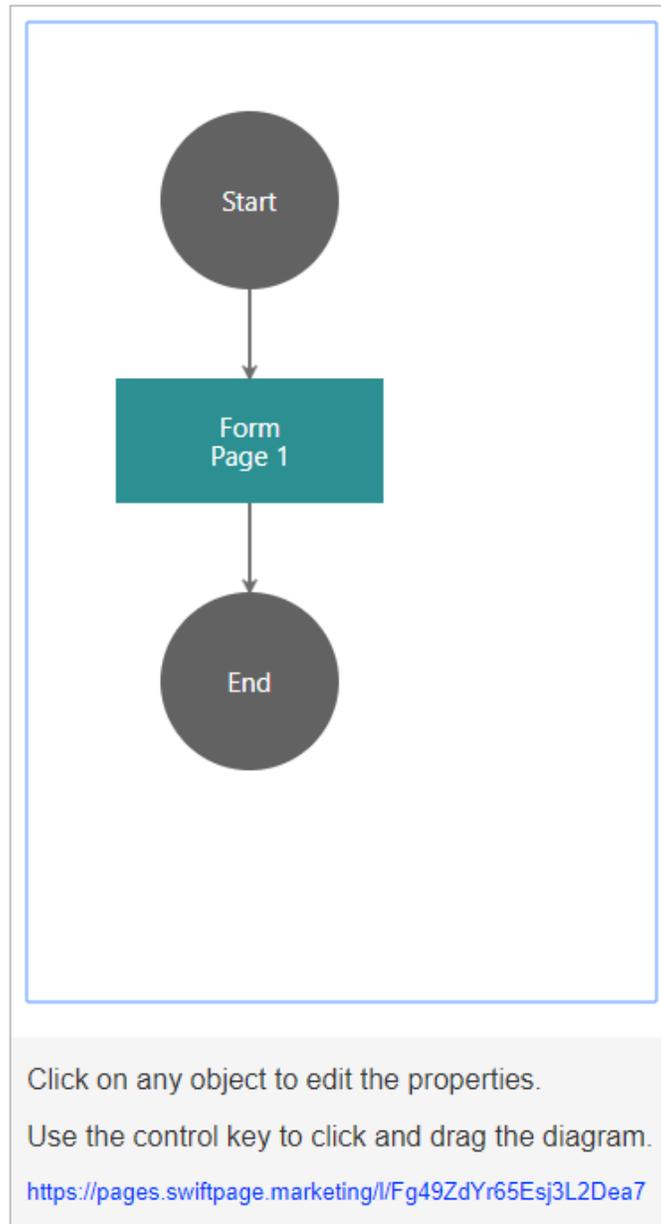
*Assign Contact To*

If you wish to assign a default owner to contact, the please choose the owner name.

- **Page Name:** Add in a name for your Landing Page so that you can easily identify it amongst any others you might create. As mentioned, if you use multiple databases it would be a good idea to use the database name you are working within as part of the Landing Page name.
- **Smart Tags:** Smart Tags allow you to easily search for a particular Landing Page in your list. This becomes more valuable the more Landing pages you have created.
- **Page Type:** There are two options available here:
  - **My Website (CMS, WordPress, html)** – This option allows you to make use of an existing webform that you might have on your own website. So for example, if you have a webform allowing contacts to sign up for a trial of your products, you could use a landing page to siphon those details of any sign ups into your Act! database. We will discuss this method later in the training.
  - **Page Designer** – This option allows you to create a “stand-alone” webform that you could use anywhere rather than relying on pulling data from a pre-existing form. This is the method we will discuss initially.
- **Select Skin:** This is where we can choose the Landing Page template that we created earlier. This is why it is best to create that skin first before getting to this step.
- **Notifications:** Add any email addresses here to receive an instant notification whenever a contact completes your form.
- **Auto-Response:** Once a contact complete the form, they can automatically be added to an AMA marketing campaign without any further interaction from yourself. This is useful for “Thank you for registering” responses, or could be used to promote a specific product or service that all contacts who have completed this specific Landing Page would be interested in.
- **Allow Duplicates:** Allowing duplicates means that the same person could fill in the form multiple times, and each time a new contact in Act! would be created. We recommend that you do not allow duplicates typically.
- **Assign Contact To:** Once the contacts are created in Act! they will be assigned to the user that created the Landing Page by default. If you would prefer to assign newly created contacts to a specific Act! user, you can make your selection here.

Once you have completed all of the fields, click the **Create** button in the top right corner.

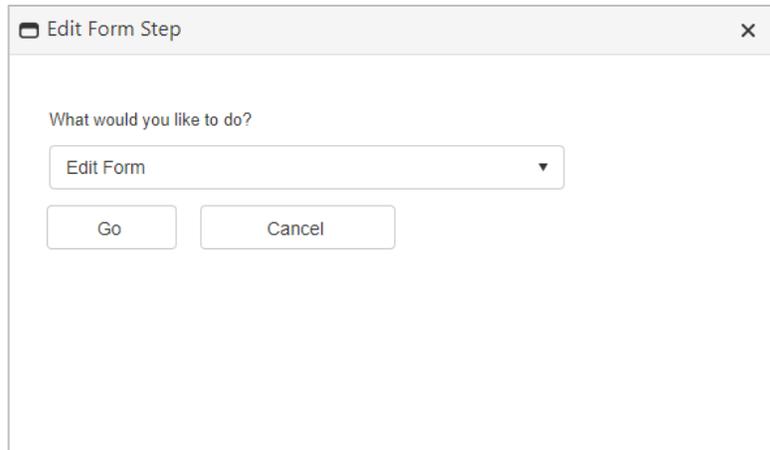
This will show you the workflow for your Landing Page which will look like this:



This workflow design works in the same way as it does for the Drip Marketing campaign designer that we will look at extensively later in the training, but we will cover the basics now.

Whenever you are using the workflow designer, you must begin with a **Start** step, and end with an **End** step. Every step in-between is one of the actions that will occur in the process. So in the case of the example above, our workflow is only one step, completing a form. If we wanted to, we could change this though, we could for example create a workflow that contains multiple webforms to complete, or we could specify that once the webform is completed, an activity will automatically be scheduled with the contact as well. Once we have created our form we will look at adding these additional steps.

In order to create our form, click the **Form** step, choose **Edit Form** in the dropdown and click **Go**.



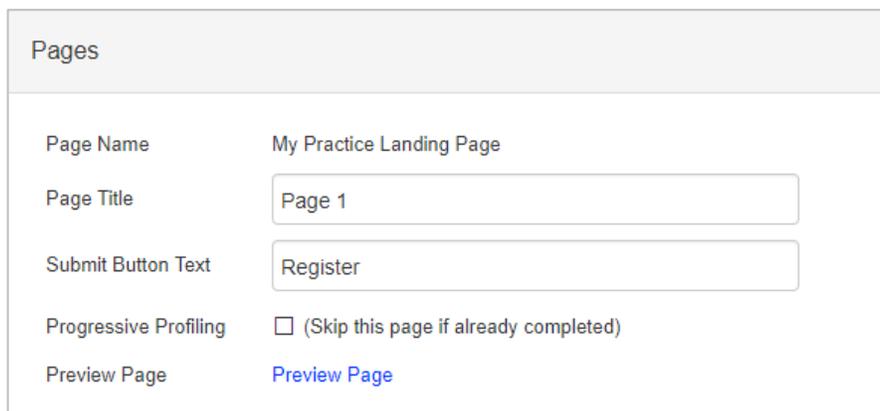
What would you like to do?

Edit Form

Go Cancel

You will now be able to configure the specific questions that you want to ask contacts, and then map those responses back to appropriate fields within your Act! database.

Initially, you will see the following:



Pages

Page Name My Practice Landing Page

Page Title Page 1

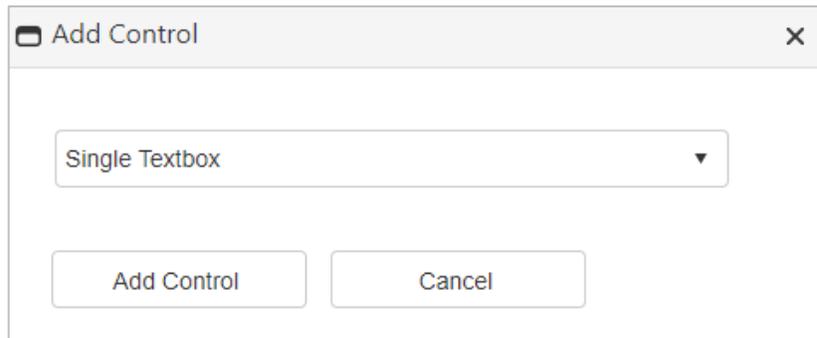
Submit Button Text Register

Progressive Profiling  (Skip this page if already completed)

Preview Page [Preview Page](#)

- **Page Title** is simply used to distinguish this individual form within your Landing page workflow. Feel free to change this if you want, or else leave it as Page 1.
- The **Submit Button Text** is the text that will appear on the button at the bottom of the form that the contact will use to submit their details. Again feel free to change this or leave it as is.
- The **Progressive Profiling** checkbox is used if you set up multiple forms for your contacts to fill in, perhaps as part of a feedback survey. In that instance, it may be useful for contacts to leave your Landing Page and return to complete it at a later time. Progressive Profiling allows them to do just that. **This is available on the Ultimate tier only.**
- **Preview Page** allows you to see what your Landing Page currently looks like.

In order to begin adding questions to your form, click the **Actions** menu in the top right corner, and choose **Add Control**.



The dropdown menu provides a large range of different field types that you can use. **Single Textbox** is the most common and allows contacts to type in a freeform response to your question. We will add some fields shortly, but you can find a list of the types that are available below:



**NOTE:** All field types can be mapped back to Act! database fields with a few exceptions that are listed in their descriptions.

- **Checkbox:** Allows you to add a checkbox for contacts to tick or clear. This field cannot be a mandatory field.
- **Checkbox List:** Allows you to add a list of checkboxes (so could be used to allow contacts to indicate which products or services they are interested in) and contacts can tick multiple options. Checkbox lists can be made mandatory fields that contacts must fill in before they submit the form.
- **Comment Box:** Adds a large text box that allows contacts to add their own freeform comments. Can be a mandatory field.
- **Dropdown:** Adds a dropdown list of values that you can configure. Can be a mandatory field.
- **Date:** Adds a field that allows you to choose a date from a mini calendar view. Can be a mandatory field.
- **Date / Time:** Same as a Date field, but also allows you to insert a time as well. Can be a mandatory field.
- **Email:** Used to add an email address to your form. **You MUST include at least one email field on your Landing Page.** The program uses this to perform duplicate checking, and in order to perform any emailing you will need this information. Can be a mandatory field, and at least one field should definitely be marked as such.
- **Hidden:** This field will not be able to be seen by contacts who complete your form, but it allows you to add a default value and map this back to Act!. This is useful if

you wish to make sure that a specific field in your Act! database is always completed with a certain value whenever any individual completes your webform. Hidden fields cannot be mandatory fields.

- **HTML:** This allows you to create your own HTML block to be added to your webform. This can be useful if you want to add any statements, subtitles or even pictures and the like to your webform. Cannot be a mandatory field, and does not map back to Act!.
- **Label:** Adds a label to your template. Similar to HTML in that it can be used to add blocks of text to your webform, but in a much simpler way that does not require any HTML knowledge. Cannot be a mandatory field, and does not map back to Act!.
- **Password:** This type of field will automatically hide anything that is typed within it by only displaying asterisks. Can be a mandatory field.
- **Phone Number:** Allows you to add a phone number in the US phone format. If you do not wish to use this formatting, consider adding a Single textbox instead. Can be a mandatory field.
- **Phone Number (International):** This field is not currently in use, if you add it to your webform it will not appear when using the Landing Page. We recommend simply using a Single Textbox instead.
- **Radio Button List:** Allows you to add radio buttons to your webform. A contact may only choose to select one radio button. Can be a mandatory field.
- **Single Textbox:** This is the standard type of field that you can add to your forms and allows contacts to type in their responses. Most of your questions will likely be Single Textboxes. Can be a mandatory field.
- **Slider:** Allows you to add a sliding scale to your webform. You can configure the value of each stage on the bar, so this could be a numerical values, or it could be ratings such as Completely Agree, Mostly Agree, Partially Agree etc. Cannot be a mandatory field.
- **Star Rating:** Allows you to add a rating system to your webform. This can be a range of values (the default is 5 but you can change this between 2 and 10). Cannot be a mandatory field.
- **Time:** Allows the contact to specify a time using the time console. Can be a mandatory field.

In our example we will create a very simple form that asks for the contact's name, email address, and to have them indicate their interest in one of our products.

To begin with, go to the **Actions** menu and choose **Add Control**. Make sure **Single Textbox** is selected, then click the **Add Control** button.

Edit Question

Single Textbox

---

Enter your question

Full Name

Empty Message text

Enter Your Name Here

Default Value

Require an Answer to This Question

Please complete your name

Width Height

250

40

Map to an Act! field (optional)

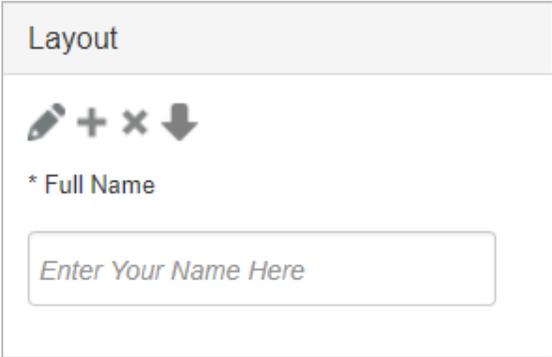
Contact ▼

fullName (String) ▼

- **Enter Your Question:** This is the label that will appear above the field on your webform.
- **Empty Message text:** This light grey text will appear in the field until the contact enters their own information. useful as a prompt to complete the field or to clarify the information required.
- **Default Value:** You can choose to have a default value present in the field that the contact would need to change.
- **Require an Answer to This Question:** Makes the field mandatory. Contacts must complete the field before they will be able to submit their information.
- **Display this error message:** You can add an error message that will be displayed if the contact tries to submit the webform without completing this field.
- **Width/Height:** This is the size of the actual text box that appears on your webform in pixels. We would recommend 250 x 40, but you can change this if you wish.
- **Map to an Act! field (optional):** If you wish this information to link back into an Act! field, you can choose to do so here. Webforms can only currently be linked back to Contact fields in Act!.

In our example we want to add a **Single Textbox** for **Full Name** as per the screenshot above. pay particular attention to the **Map to Act! field** section. Once we have completed the fields, click the **Actions** menu in the top right corner and choose **Save & Return**.

Your webform Layout will now look like this:



The screenshot shows a window titled "Layout" with a light gray header. Below the header, there are four icons: a pencil, a plus sign, an 'X', and a downward arrow. Below these icons, the text "\* Full Name" is displayed. Underneath the text is a rectangular text input field with a light gray border and a light gray background. Inside the field, the placeholder text "Enter Your Name Here" is written in a light gray font.

You can see the question name has an **asterisk (\*)** next to it. This indicates that the field is a mandatory field.

The **Pencil** icon allows you to go back in and edit your question (e.g. change the name, add a default value etc.)

The **+** icon allows you to add a new question immediately below this one. This is useful if you have already created several questions and you wish to add in another in the middle of your form.

The **X** icon allows you to delete the question.

The **Arrow** icon will only appear when you have added two or more fields. This allows you to change the order of your questions by moving them up or down.

Now that we have added a field to capture the contact's full name, we will next add a field to capture their email address. Click the **+** icon, and choose to add an **Email** field. Complete the field as per the screenshot below, again paying close attention to the **Map to Act! field** section:

### Edit Question

Email

---

Enter your question

Empty Message text

Default Value

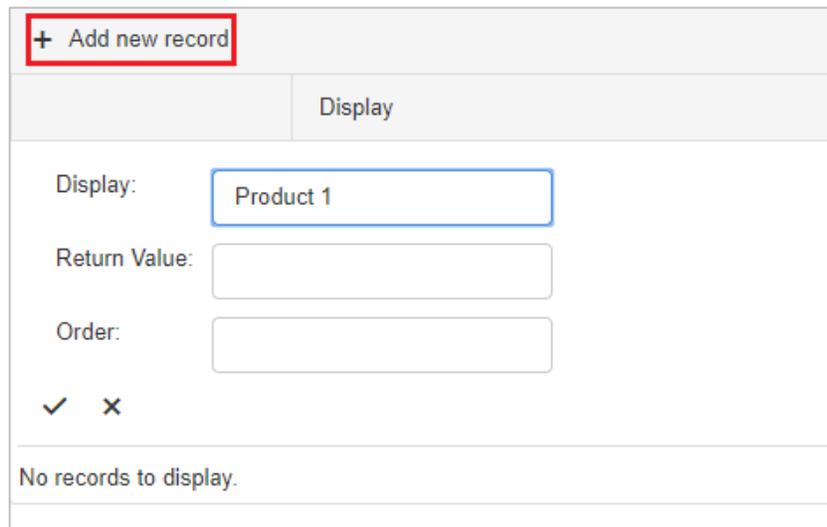
Require an Answer to This Question

Width  Height

Map to an Act! field (optional)

You now have two mandatory fields on your webform. In our example we wish to also capture the specific product that our contacts are interested in. We will do this by creating a **Dropdown** field.

The big difference when creating a dropdown field is that you need to add the values that will appear in your dropdown list. To do this, once you have started to create the field, you need to click **+ Add New Record**:



+ Add new record	
Display	
Display:	<input type="text" value="Product 1"/>
Return Value:	<input type="text"/>
Order:	<input type="text"/>
✓ ✕	
No records to display.	

There are three values that you can complete:

- **Display:** This is the value name that will appear in your dropdown list.
- **Return Value:** Complete this field if you wish a different value to be entered into your mapped field in Act!. For example, the Display Name might be Seagate Hard Drive, but the Return Value might be an internal reference number such as SEA01 which is what will actually show in your database.
- **Order:** If you wish your values to appear in a non-alphabetical order, you can add numerical values in this field to set the order.

Click the **Tick** icon once the values have been completed. In our example, we will simply add in three products called **Product 1**, **Product 2** and **Product 3**. Once completed the field should look like this:

### Edit Question

Dropdown

---

Enter your question

Which product are you Most Interested In?

Empty Message text

*(This is an example of an empty message string)*

Default Value

Require an Answer to This Question

*Display this error message when this question is not answered (i.e. Required)*

Width Height

250

150

Map to an Act! field (optional)

Contact ▼

customFields/product\_of\_interest (String) ▼

+ Add new record
↻ Refresh

	Display	Return Value	Order	
	Product 1	Product 1	1	×
	Product 2	Product 2	1	×
	Product 3	Product 3	1	×

Import Lists

Import File



**NOTE:** In this example we have created a specific field in our Act! database called **Product of Interest**. As mentioned earlier, you may want to create this field yourself, or use a spare field in your database such as one of the User fields.

Once the field has been completed, click the **Actions** menu and choose **Save & Return**.

Your webform layout should now look like this:

Layout

\* Full Name

---

\* Email

---

Which product are you Most Interested In?

We are now nearly ready to demonstrate using this simple webform. Before we do so, there is another consideration to be aware of.

## GDPR Consideration



**NOTE:** As GDPR affects any contacts from Europe this is something that all businesses should take into consideration unless you are absolutely certain that you will **never** have a contact from Europe complete your webform.

When it comes to emarketing one key consideration for any business has to be the General Data Protection Regulation (GDPR). In short, a contact governed by this European regulation must now explicitly provide permission to any company that wishes to hold any personal details about them on their systems, and explicitly provide permission for a company to send them marketing materials via email.

The purpose of Landing Pages in AMA is to capture a contact's information, and later to add them to a marketing campaign. Because of this, it is vital to ask for this permission within our webforms, and record this in Act!.

Act! Marketing Automation has provided a template to help you get started with this. This template will add in GDPR questions into your template which you can then amend to make them more applicable to your specific business.

To add the GDPR questions, go to the **Actions** menu, and choose **+ Add Template**. Select **GDPR** from the dropdown list, and click **Use Template**.



**NOTE:** You may notice there is also a **Contact Us** template available. This will add in the questions **Full Name, Email, Company** and **Phone** to your template, saving you some time. Remember though that you will need to edit each question to map them to your own Act! fields.

Once you have added the GDPR template, you will see the following three questions have been added to the end of your form:



\* Email Address

---



{Enter a brief description about your company, and what communications they will be receiving upon signing up}

---



By checking this box, you are confirming that you wish to sign up for [REDACTED] communications.

You will notice that using this template has also added an **Email Address** field. As we have already created one earlier, we will delete this.

You will now need to amend the last two fields by clicking the **Pencil** icon so that you can make them specific to your own business. For example:



By clicking Register, you are agreeing that Swiftpage may hold your contact details for the purposes of sending you marketing communications.

---



I confirm that I am happy for Swiftpage to hold my contact details, and I agree to subscribe to their marketing campaigns.



**NOTE:** If you wish to capture this permission in your Act! database, you will need to map the tick box to an appropriate Act! field. In our example, we have created a field called **GDPR Permission Received**, again you could map this to a spare User field if you wish.

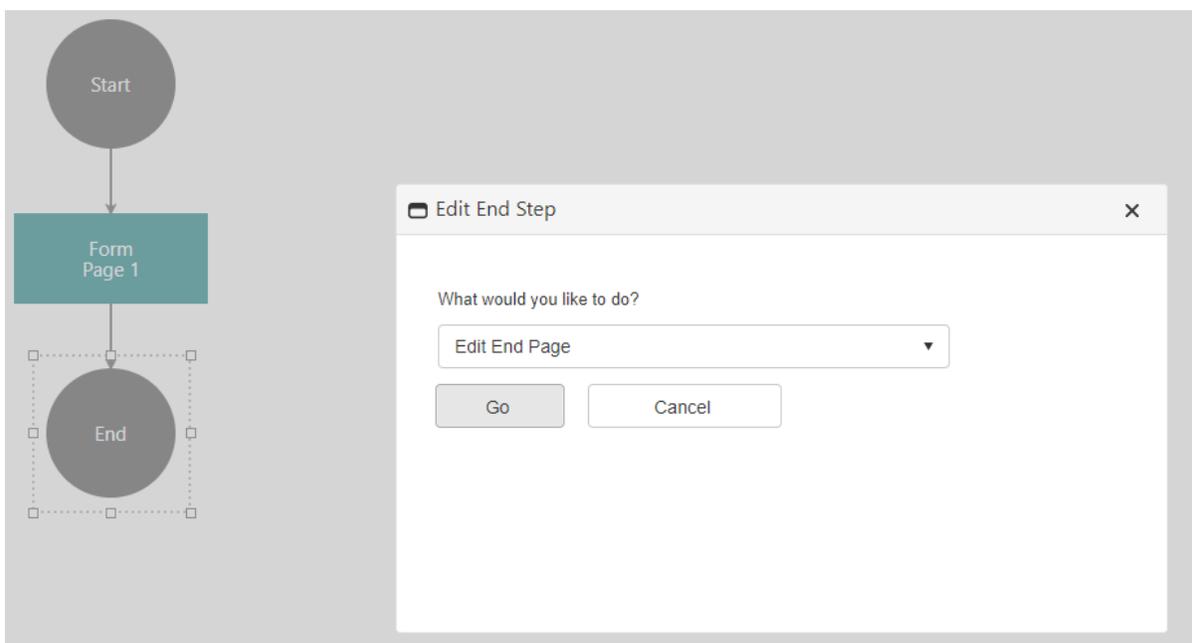
As the GDPR tickbox is a mandatory field, this means that the contact will have to tick it before they will be able to submit their details. In this way, you are ensuring that you never receive any contact details through your webform that have not given you explicit permission to hold their contact details and send marketing communications to them.

Once you are happy that your form is now completed, click the **Actions** menu, and choose **Save & Return** to go back to your Landing Pages workflow view.

## Completing the Landing Page

There is only one more step to take before we can begin using the Landing Page that we have created, and that is amending the end page. Once a contact has completed the form, they will then be presented with a confirmation webpage. We need to configure the content that will appear on that page.

To do this, click on the **End** step in your workflow. Make sure that **Edit End Page** is showing in the dropdown list, then click **Go**.

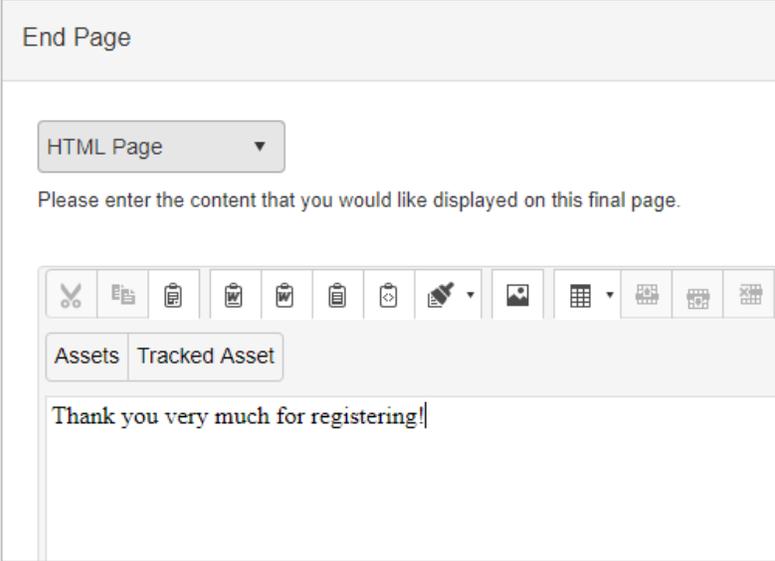


On the next screen, there is a dropdown in the top left corner that gives you two options:

- **HTML Page:** This allows you to create your own message that will appear to the contact. This can be a very simple thank you for signing up, or if you have a person in your business who is competent in working with HTML, it could be as complex as you want.

- **Redirect URL:** This option allows you to specify a URL that the contact will see after submitting your form. This is often used to redirect to your own company website.

In our example we will use the **HTML Page** option to type in a simple message saying “Thank you very much for registering!”



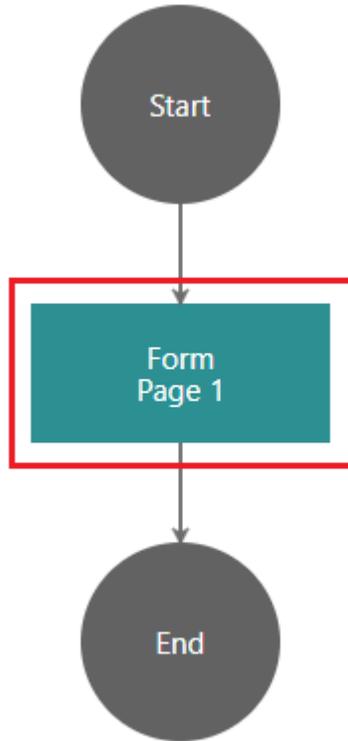
The screenshot shows a configuration window titled "End Page". At the top, there is a dropdown menu currently set to "HTML Page". Below this, a text prompt reads: "Please enter the content that you would like displayed on this final page." Underneath the prompt is a rich text editor toolbar with various icons for text formatting, alignment, and insertion. Below the toolbar are two tabs: "Assets" and "Tracked Asset". The main text area of the editor contains the text: "Thank you very much for registering!"

Once you have completed this, click the **Actions** menu and choose **Save and Return** to take you back to your workflow view again.

## Optional Step – Additional Forms

As previously mentioned, it is possible to create Landing Pages that make use of multiple forms, typically to gather much more information from contacts such as via an in-depth survey or services rendered.

In order to add an additional form, make sure you are viewing your Landing Page workflow, then click on the **Form** step:



Select the option to **Insert action after**, select **Form** in the next dropdown, and click **Go**.

✖ Edit Form Step

What would you like to do?

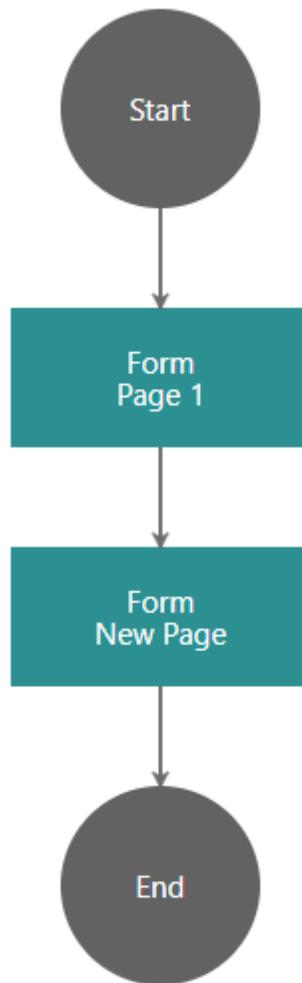
Insert action after ▼

Select Action

Form ▼

Go Cancel

Your workflow will now look like this:



You can now click on the second **Form** step, and configure it as previously discussed. Alternatively if you wish to delete this new form, click the Form step and choose **Remove Form** from the dropdown.

## Optional Step – Additional Actions

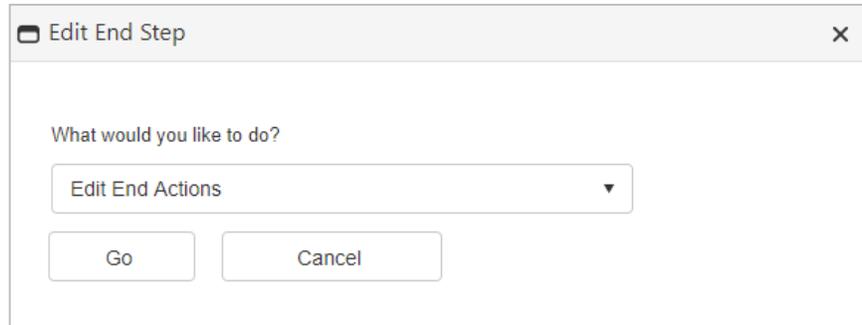
It is also possible to configure additional actions that you would like to automate after a contact completes your form. Actions include adding the contact to a drip marketing campaign, creating an activity with the contact, creating an opportunity for the contact and more.



**NOTE:** With regards to contacts that already exist in your database, if you have disabled duplicate creation then any contact that completes your webform will not create a new contact, however they **will** have these additional actions applied to them. This could be very helpful if you want to create a Landing Page to enter contacts into a specific marketing campaign, or perhaps register them to a particular event you have planned.

To begin configuring these options, make sure you are viewing your Landing Page workflow, then click on the **End** step.

In the dropdown list, select **Edit End Actions**, then click **Go**.



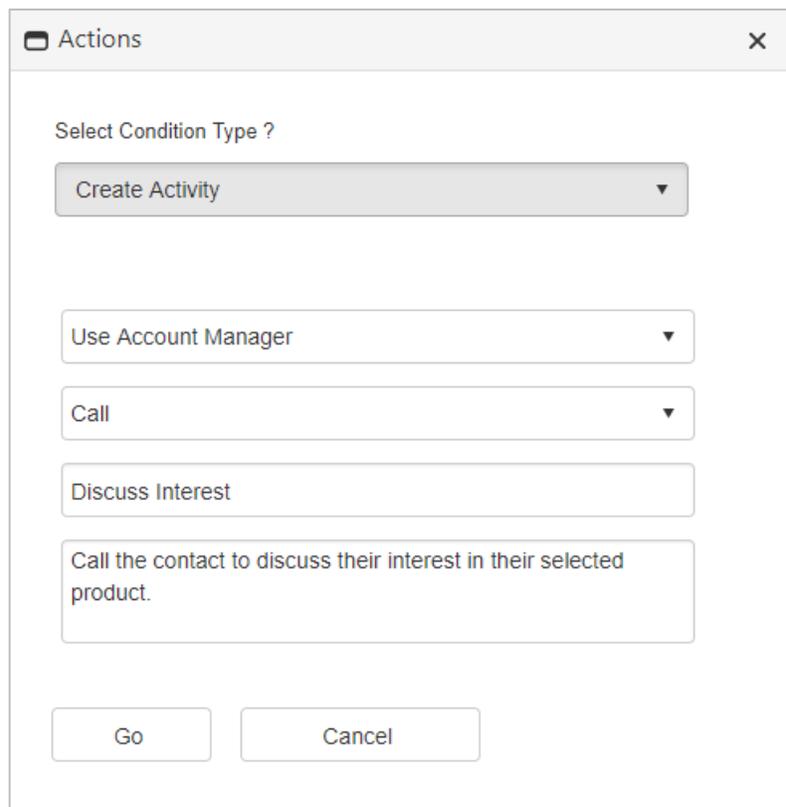
A pop-up box will immediately appear asking you to **Select Condition Type** from a dropdown list. These options allow you to configure exactly what you would like to happen automatically when a person completes your webform. You are not limited to one action, you can add in as many as you would like. The actions available are:

- **Add to Drip:** This allows you to automatically add a contact to any drip marketing campaigns that you currently have set up. This can be very helpful if you have created multiple landing pages, and each one places the contact in a different campaign.
- **Add to Event:** When creating a drip marketing campaign, it is possible to base this around a particular event. For example, perhaps you have an exhibition coming up and you want to inform your customers about this. This option means that any contact that completes your form will be automatically added to that event, giving you a very suitable way of signing up interested parties.
- **Add to Group:** Any contact that completes your webform will be automatically added into a selected Group in Act!.
- **Create Activity:** Once the contact has completed your form, they will have an Activity scheduled with them automatically, perhaps to call them directly to discuss their needs.
- **Create Opportunity:** Once the contact has completed your form, they will have an Opportunity scheduled with them automatically, helping you to manage your potential sales.
- **Notification:** This allows you to specify additional email addresses that you'd like to receive a notification once the form has been completed.
- **Remove From Drip:** This allows you to automatically remove a contact from one

of your drip marketing campaigns. This could be used if a contact would like to remove themselves from a specific marketing campaign without unsubscribing altogether.

- **Update Contact field:** Once a contact completes your webform, a specified contact field will be updated with a specified value.

In our example we will choose to **Create Activity**, so make sure this is selected in the dropdown. This will then show you various options to complete:



Actions

Select Condition Type ?

Create Activity

Use Account Manager

Call

Discuss Interest

Call the contact to discuss their interest in their selected product.

Go Cancel

There are four fields available, and these allow you to specify the following:

1. Choose the Act! user you would like to schedule the Activity with.
2. Choose the type of Activity.
3. Define a subject for the Activity.
4. Complete the details of the Activity.

Once these fields have been completed, click **Go** to add this action. you will see the action listed now.

Actions

Page: 1 of 1 Go

Edit Delete Add Activity (Notes) = 'Call the contact to discuss their interest in their selected product.'

You can add as many actions as you would like to this list. To do so, simply click the **Actions** menu in the top right corner and choose **Add Action**.

Once you are happy with the additional actions, click the **Actions** menu and choose **Save & Return**.

## Working with your Landing Page

Now that your Landing Page is complete, you can begin to use it. In order to access the Landing page, you need to make sure to click on the **Landing Pages** section of Act! marketing Automation, find or search for your specific Landing Page, then click **Open** to go to your workflow view:

Landing Pages

Search My Pages Refresh

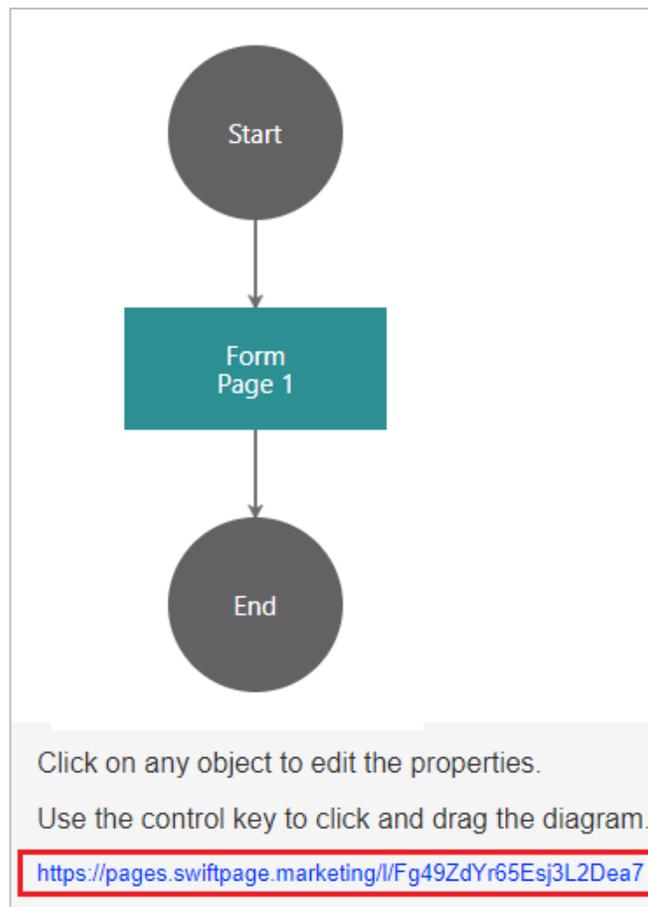
Page size: 10 Page: 1 of 1 Go

My Practice Landing Page

Entity Type: Contact  
Smart Tags: Practice;  
Page Type: Design  
Leads Captured: 5  
Last Impression: Aug-23, 2019 08:18 AM

Open

At the bottom of your workflow, you will see a unique URL. This is a direct link to this specific Landing Page, and this is what contacts will use in order to access your webform.



This link can be added anywhere you would like, so for example you might create a link on your website asking contacts to complete the webform, or you might post it on any of your social media accounts. Anyone who clicks the link will be able to complete your webform and their details will then automatically be sent to Act!.

For a few further options, click the **Actions** menu and choose **Edit Page Properties**. This allows you to change the name, change the notifications, choose duplicate preferences, choose another Landing Page skin and more. One key setting though is the ability to change the URL to something more friendly:

*Page URL*

<https://pages.swiftpage.marketing/IFg49ZdYr65Esj3L2Dea7>

Simply click **Change URL** and you will be able to amend this.

The **iFrame Script** button provides you with HTML code that gives you the ability to embed the form directly within your own webpage. So instead of having a link that takes you to a webpage, you could show the form itself directly on your own webpage. You will need to contact your website designer for assistance in using this iFrame Script.

Once you are happy with any changes you have made, click **Save** in the top right corner.

Now that you have the link for your Landing Page, you can begin using it. We will now look at what happens when someone clicks on the link by providing some dummy information.

When the link is clicked, your Landing page will open:

## This is my Practice Landing Page Skin

\* Full Name

\* Email

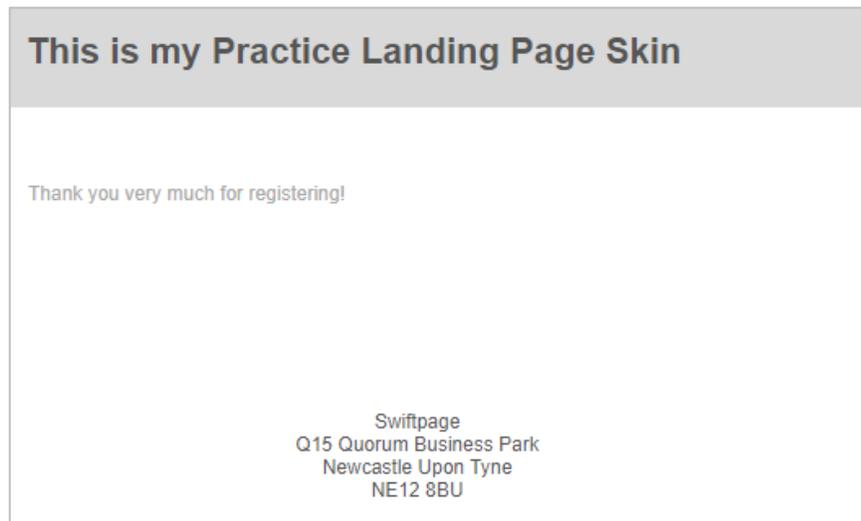
Which product are you Most Interested In?

By clicking Register, you are agreeing that Swiftpage may hold your contact details for the purposes of sending you marketing communications.

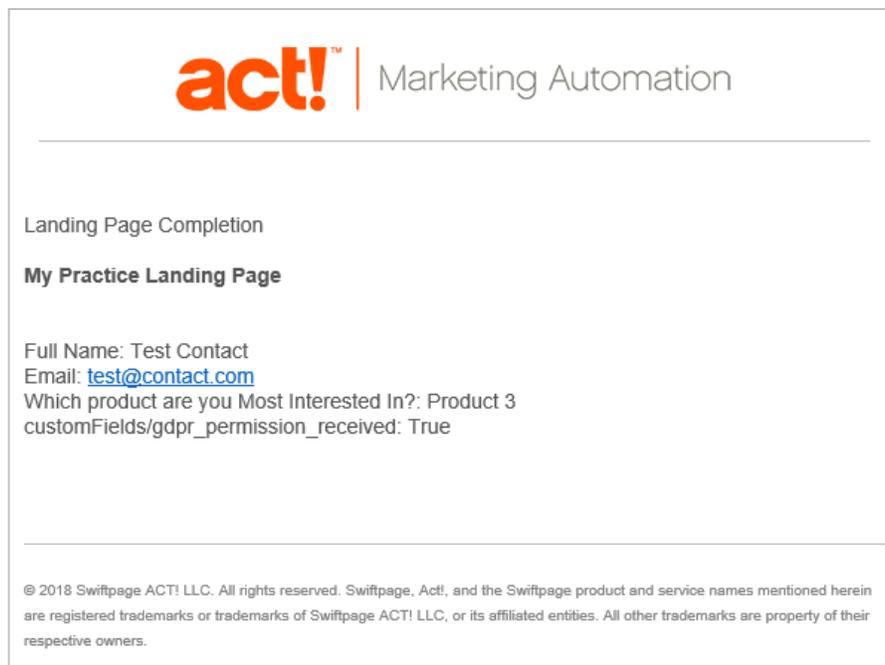
I confirm that I am happy for Swiftpage to hold my contact details, and I agree to subscribe to their marketing campaigns.

Swiftpage  
Q15 Quorum Business Park  
Newcastle Upon Tyne  
NE12 8BU

Enter some dummy information then click **Register**. You will then see the end page that you configured earlier:



You will next receive a notification email that a person has completed your Landing Page (typically within just a few minutes).



Finally, if you check the **Contacts** section of the Act! database, you will be able to find that new dummy contact.

### Business Card

Contact

E-mail

Product of Interest

GDPR Permission Received

Activities Opportunities History Notes Documents Groups/Companies Secondary Contacts Relationships Social

Dates: All Dates Types: All Priorities: All Keyw

	Type	Date	Time	Priority	Scheduled With	Regarding
<input type="checkbox"/>		23/08/2019	09:06	Low	<a href="#">Test Contact</a>	Discuss Interest

Notice that the specific fields we mapped have been completed correctly, and also that the Create Activity End action that we set up has automatically been created as well.

You have now learned how to gain new prospects into your database by utilizing landing Pages to automatically pull those contact details into your Act! database.

## Using a Landing Page with a Pre-Existing Webform

As mentioned earlier, it is also possible to use an Act! Marketing Automation Landing Page to syphon results from a pre-existing form on your own website.



**NOTE:** These steps require advanced knowledge of website design and will require the assistance of your website administrator.

To create your Landing Page, go to the Landing Pages section of AMA go to **Actions** and click **New Page**.



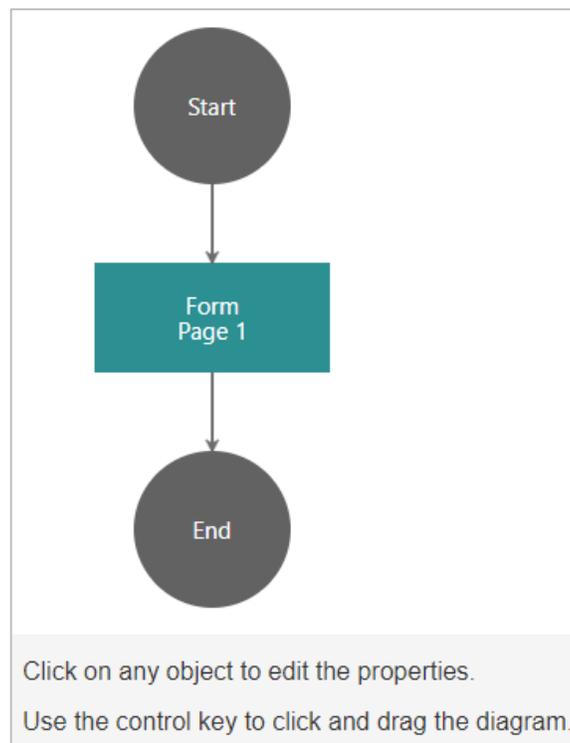
**NOTE:** If you choose to use a Landing Page in this way there is no need to create a template or skin for the Landing Page as you will simply be pulling results from your existing form.

In the options presented, make sure to choose to use **My Website (CMS, WordPress, html)**, and complete the Redirect URL where you want the page to take you after someone submits your form.

*Page Type*  
My Website (CMS, WordPress, html) ▼

*Redirect URL*  
https://www.act.com/  
Enter the full URL that you want this page to redirect to after the form submission.

Once your page has been created, you will notice that you do not have a URL link at the bottom of your workflow.



Create your form and map the fields to your Act! database as you have seen previously.

Once completed, you need to click the **Actions** menu in the top right corner, and choose **Generate HTML Script**.

### Generate HTML Script

```
<form action='https://r.swiftpage.marketing/lc.aspx' method='POST'>
<input type='hidden' name='PageId' value='063-a9a36ba2-bdab-421f-8c12-e3c81b346b27'>
<input type='hidden' name='ReturnURL' value='https://www.act.com/'>
<input id='071-84831238-1e8f-4725-9a0b-94b471e12e71' name='071-84831238-1e8f-4725-9a0b-94b471e12e71' size='50' type='text' />
<br>
<br>
<input type='submit' value='Register' name='Register'>
</form>
```

The code provided is a sample of how a form should be constructed. The important elements of the form are the hidden fields that will map back to this form, the URL for submitting this form, and the IDs of the form elements. In some cases, you can copy and paste this exact form into sites like Wordpress where Wordpress will use its style sheet to render the form with the look and feel of the site. In other cases, you will need to apply style elements to the fields.

This HTML script can then be provided to your website administrator to embed within your own website. The key is to make sure the fields you have added in the Landing Page form are linked to the fields a contact would fill out on the pre-existing webform on your own website.

# Summary

In this lesson you have learned:

- What a Landing Page is.
- How to create a skin for your Landing Pages.
- How to create a form and map the questions in it to your Act! fields.
- The various additional actions available within landing Pages.
- What happens when a contact completes your Landing Page webform.

# Checking Your Knowledge

Practice 

## Landing Page Template/Skin

1. Go to the **Templates** section of AMA.
2. Create a Landing Page skin. make sure to include your company details at the bottom of the template.
3. Don't forget to **Save** then **Publish** your template.

## Landing Page

1. Create a new landing page, making sure to choose **Page Designer** as the **Page Type**.
2. Assign your skin to the Landing Page.
3. Create a form with the following fields as per the previous instructions and map them back to Act!:
  - a. Full Name
  - b. Email Address
  - c. Product of Interest (dropdown list)
  - d. GDPR Permission Received
4. Add an End step to create an activity.

## Landing Page Test

1. Add dummy details into your Landing Page and verify the following:
  - a. You received a notification email.
  - b. The contact was added successfully to your Act! database.
  - c. The contact has an Activity scheduled against him.

# Templates

## Overview

In this lesson, we will learn how to create emarketing templates. Now that we have learned how to gain new prospects into our database, we need to look at how we can then begin to utilize Act! marketing Automation's powerful marketing features to communicate with those prospects. A big part of this is creating your own email templates. We will therefore discuss the different types of templates that are available, and will look in-depth at the controls and options available in their creation.

## Objectives

After completing this lesson, you will be able to:

- Create a template using the Drag and Drop editor
- Create a template using the WYSIWYG (What You See Is What You Get) editor.
- Understand the content options available when creating templates.



Please see the video library **Templates** which contains information relevant for this section of the training: <http://training-act.com/act/act-lib-ama/?courseId=templates&>

# What are Templates in Act! Marketing Automation?

When creating your marketing campaigns in AMA, the bulk of your communications will typically be performed via email. In order to send professional and interesting looking emails to your contacts, AMA has its own template editor that makes it particularly easy to design the kind of emails that your contacts will want to read. It has a huge range of customization options and an intuitive interface enabling you to create any design that you would like.

Once you have created your templates, you can then assign these as steps in your drip marketing campaigns which we will discuss later in the training. Templates can be used just once, or can be used across multiple campaigns if you wish.

In this lesson we will look at the functionality available so that you are aware of all the options available and all the possibilities when creating your AMA templates.

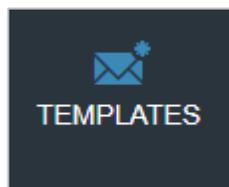
## Template Creation



**NOTE:** The steps listed in this lesson are designed to demonstrate the various features available within the template editor rather than attempting to craft a particularly professional looking template. When creating your own templates that you plan to send to contacts, we would recommend taking a lot more time to carefully consider the content that you wish to send their way, and the presentation of your communications with them.

## Drag and Drop Editor

We will begin by looking at the most commonly used editor when designing your emarketing templates, the Drag and Drop editor. To access this, first click on the **Templates** section of AMA.



This will show you all of the templates that you and your colleagues have created within your AMA account. Even if the templates were created in a different database, they will be available to use in any of your campaigns within any of your databases.

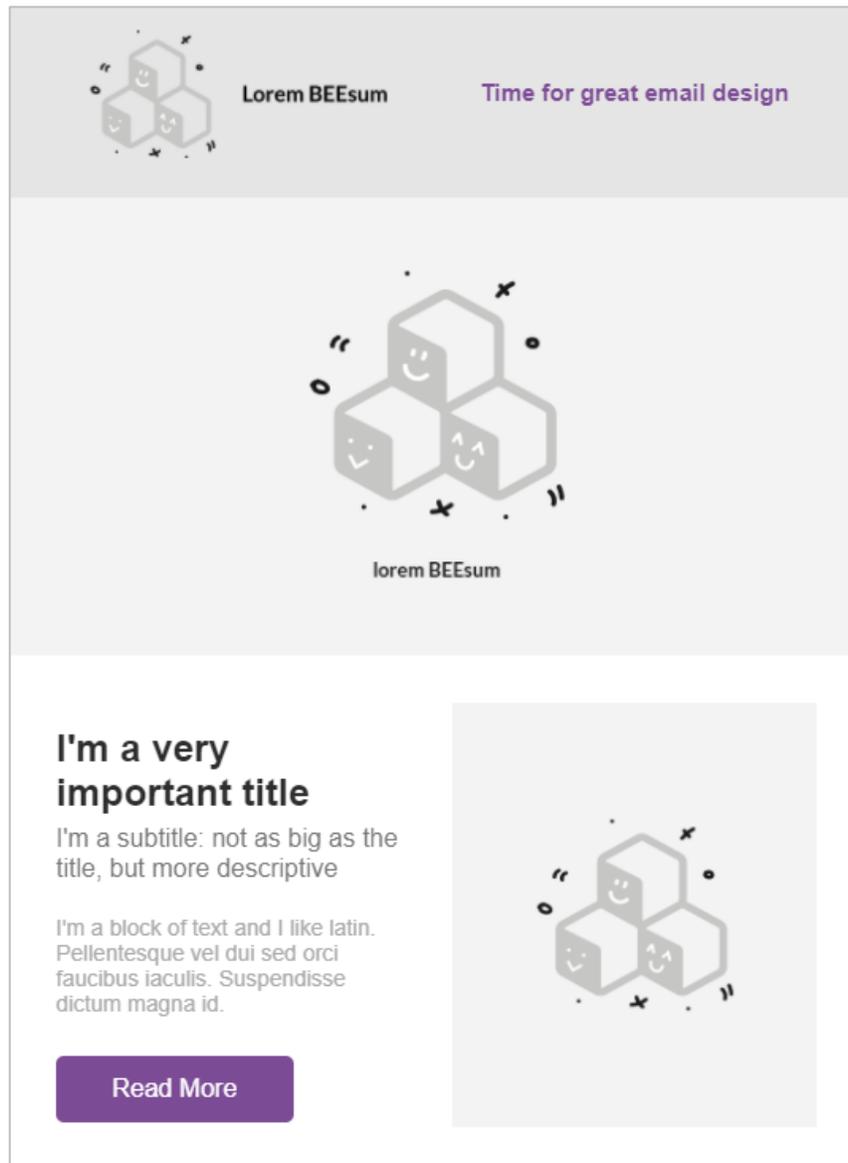
To begin creating a new template, click the **Actions** menu in the top right corner, and choose **New Template**.

- **Name:** Enter a name for your template. As you can use templates with any of your Act! databases, it is less important to include the database name here. However, it is still a good idea to include details of where you intend to use it, “Summer 2019 Campaign 1<sup>st</sup> Email” as an example.
- **Type:** There are three types of template available:
  - **Marketing:** The most common type of template which can make use of the drag and drop editor and the WYSIWYG editor. We will discuss these templates first.
  - **Sales:** Typically used to send short messages to contacts that are less visual in nature. For example, a “thank you for signing up” type email. Makes use of a simple sales editor.
  - **Landing Page:** We have already looked at these templates earlier in the training.
- **Editor:** There are two options available:
  - **Drag and Drop:** This is an intuitive interface that allows you to literally drag and drop the content you wish to display into place on your template.
  - **WYSIWYG:** The What You See Is What You Get editor allows you to use HTML directly to create your templates, as well as import any pre-existing HTML templates your company may have already designed.

- **Name:** You can choose from a range of over 150 templates to give you a head start in designing your templates. Whilst strictly speaking it makes no difference which template you choose as you can fully customize any of them, the general idea is that if you find one where the layout matches the look you would like to achieve this will save you quite a lot of time as you can simply replace the existing content rather than having to amend the actual layout of the template itself.

In our example, we will begin by creating a **Marketing** template using the **Drag and Drop** editor, with the **Wireframe Article** template to help us get started.

Once you have chosen the options you would like to use, click **Create** which will open the Drag and Drop editor.



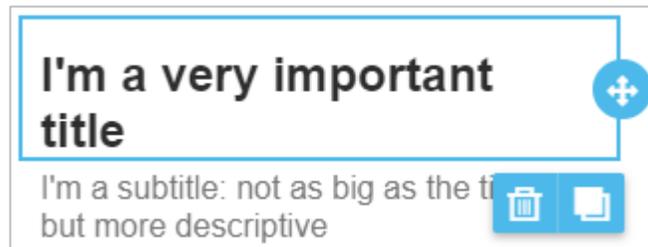
## Editing the Existing Template Content

We have already looked at using this editor briefly when we created the Landing page skin, but to reiterate the basic premise of the Drag and Drop editor is that the template consists

of a number of blocks. As you move your mouse across the template, you will notice these blocks are highlighted. Each block will have some content within it, this might be text, it could be an image or a button etc. You can drag and drop new rows, blocks or content onto your template wherever you would like, and you can remove rows, blocks and content too. In this way, you will build up the design of your template.

You can also edit any of the content by simply clicking on it, then make any of the changes required. So for example, if you want to change the title at the top of the screen, simply click on it, delete the current title and type in your own. We will look at some of this functionality now.

Whenever you click on a block to highlight it, several icons will show that allow you to perform different actions on that block:



This icon allows you to delete the currently selected block.

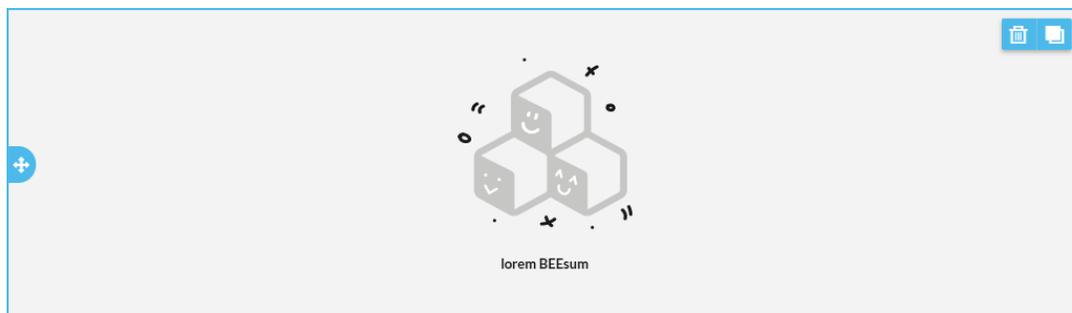


This icon allows you to duplicate the block.

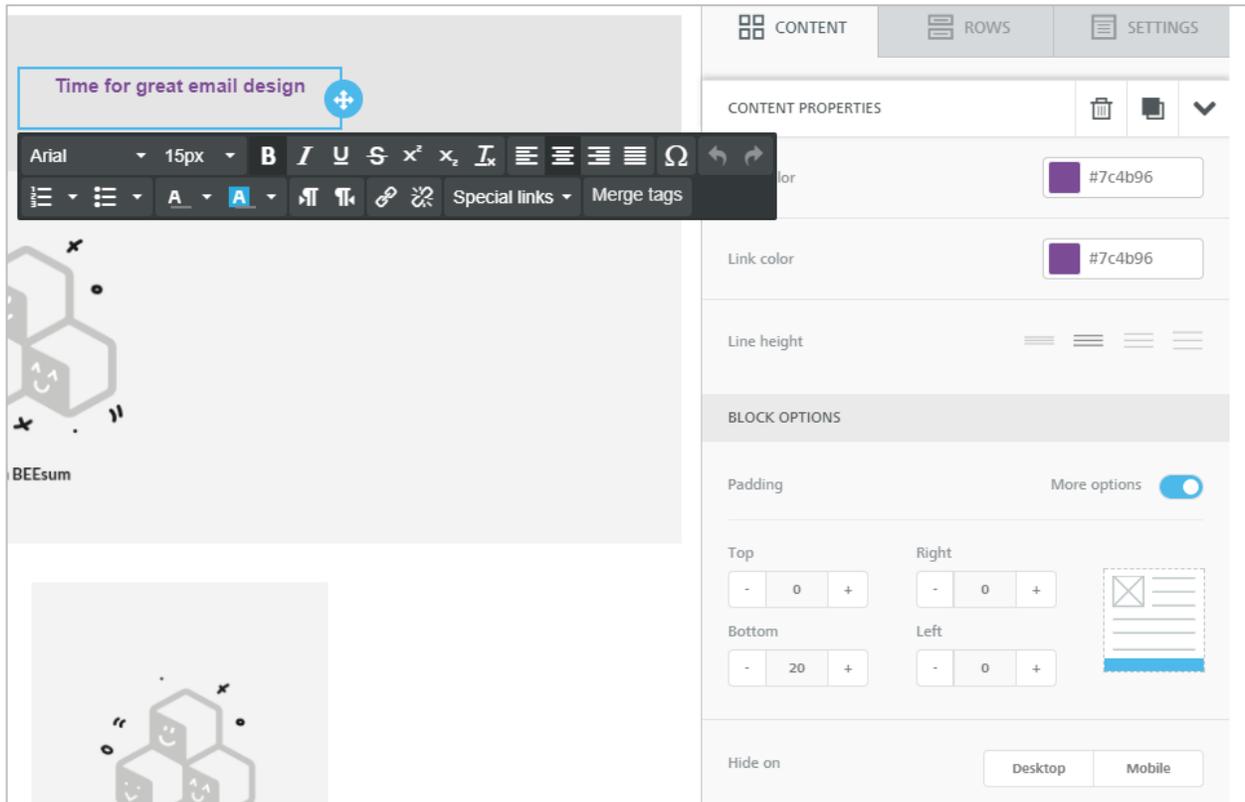


If you click and drag this icon, you can reposition the block on your template.

You can also perform similar actions to an entire row rather than an individual block. By moving your mouse to the left hand side of the template, you will see the entire row highlight rather than an individual block, and the same options to delete, duplicate or move are available.



Now try clicking on the title at the top of the template. You will see that the block is now highlighted, and a letterbox menu of various options now shows on the screen. Furthermore, on the right side of the screen you will see the **Content Properties** that shows you more information about the currently selected block.



Moving your mouse over the letterbox menu will show you all of the text options available, including the ability to make text bold, underline, italics, alignment, bullet points, paragraphing, and inserting links.

The Content Properties begins with three buttons:



This gives you options to delete the block, duplicate the block, and the downward arrow hides the Content Properties menu.

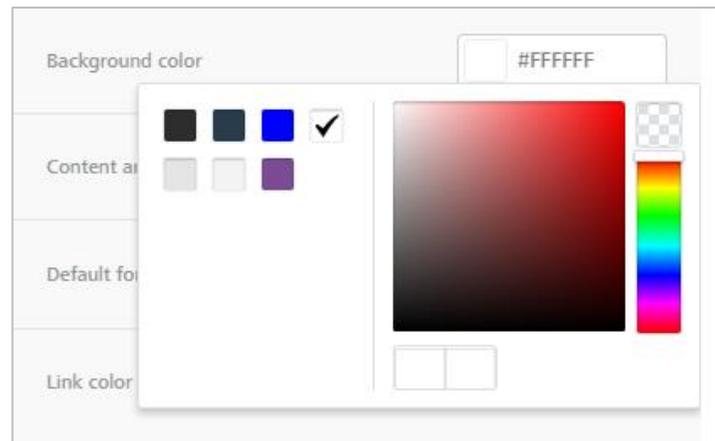
Below that, you have options for:

- **Color:** The color of the text in the block.



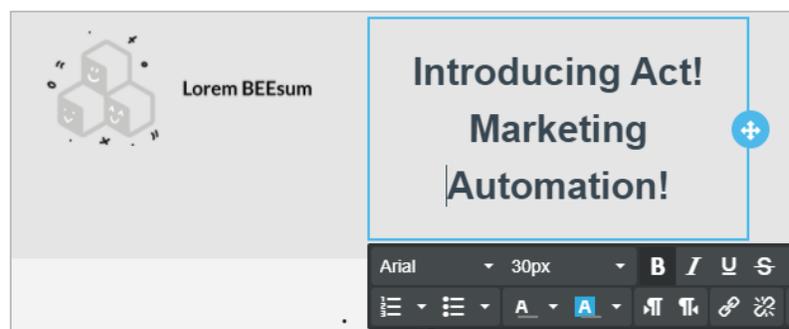
**NOTE:** When changing any of the colors on your template, if you know the hexadecimal reference number for your color (if your company has a marketing department they may well know this), then you can click on the reference and type it in. Otherwise, if you click

on the color itself, you can use the color selector pictured below.



- **Link color:** The color of the text that will be used if you add a link.
- **Line Height:** Change the position of the text within the block.
- **Padding:** You can add padding to an individual block to change its position in relation to the other blocks on your template.
- **Hide on:** This option allows you to hide a particular block when a contact looks at your template on either a desktop computer or a mobile device. This is because an email that may yield excellent results on desktop screens may not work as well when the user needs to scroll on his mobile device.

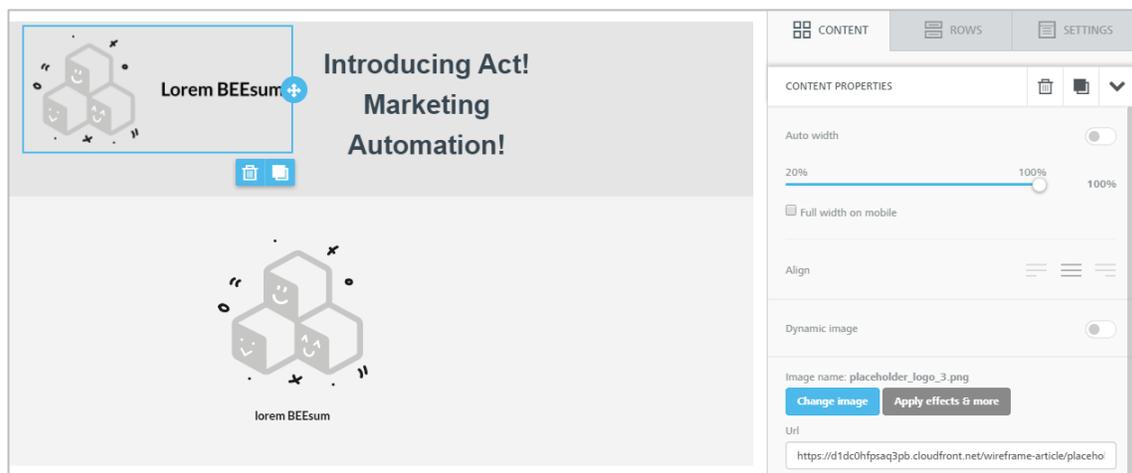
In our example, we will use this template to introduce a new product. Therefore the title will reflect this.



In this particular template, there is also a picture in the top banner. It would be useful to

replace this with our company logo. That way when the contact looks at the top of the email they have received, they very quickly can establish who it is from and what it is about.

To replace a picture, firstly, click on the picture block which again will highlight the block and show **Content Properties** on the right. These properties will now be different as we have highlighted a picture block this time:



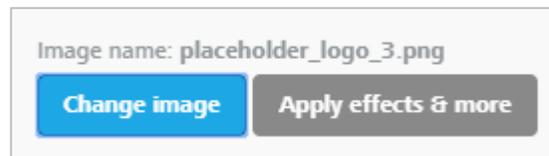
- **Auto width:** Toggling this option means that the program will automatically adjust the image to fill as much of the block as possible. Alternatively, if this option is not toggled, you can set the image width yourself in relation to the size of the block, particularly helpful if you need to quickly resize your image.
- **Align:** Change the alignment of the image within the block.
- **Dynamic image:** This allows you to insert a URL for the location of your image rather than uploading one yourself.
- **Change Image:** Allows you to upload your own image, or change it to another from the free image library. This will be discussed in detail below.
- **Apply effects & more:** Allows you to make changes to the image showing on your template, such as cropping the image, resizing it, or adding text labels to it.
- **Alternate text:** Enter the text that should be displayed when images are turned off (e.g. a contact uses Outlook and does not have “download images automatically” selected). This is a best practice in email design since there are still email clients such as Outlook that may have images turned off by default.
- **Image link:** Allows you to link the image so several possible actions occur when a contact clicks or taps the image:
  - **Open web page:** Opens the URL that you specify in the provided box.
  - **Send email:** Allows you to specify an email address, a subject and even the body of the email you wish the contact to launch. This is typically used to send standard responses to a specified email address, such as a notification that the contact is interested in receiving more information

about this product.

- **Make call:** You can specify a phone number that will be called when the image is tapped. This is most helpful if you expect your contacts will be viewing your email on a mobile device.
- **Send SMS:** You can specify a phone number that will be texted when the image is tapped. This is most helpful if you expect your contacts will be viewing your email on a mobile device.
- **Padding:** You can add padding to an individual block to change its position in relation to the other blocks on your template.
- **Hide on:** This option allows you to hide a particular block when a contact looks at your template on either a desktop computer or a mobile device. This is because an email that may yield excellent results on desktop screens may not work as well when the user needs to scroll on his mobile device.

## The File manager

If you click on the **Change Image** option, you will be able to replace any of the images on your template.



This will take you to your own **File manager** for your Act! Marketing Automation account. This means that anyone who has permission to use AMA will be able to see the same library and use the same images in their templates.

At the top of the screen, you will see three options:

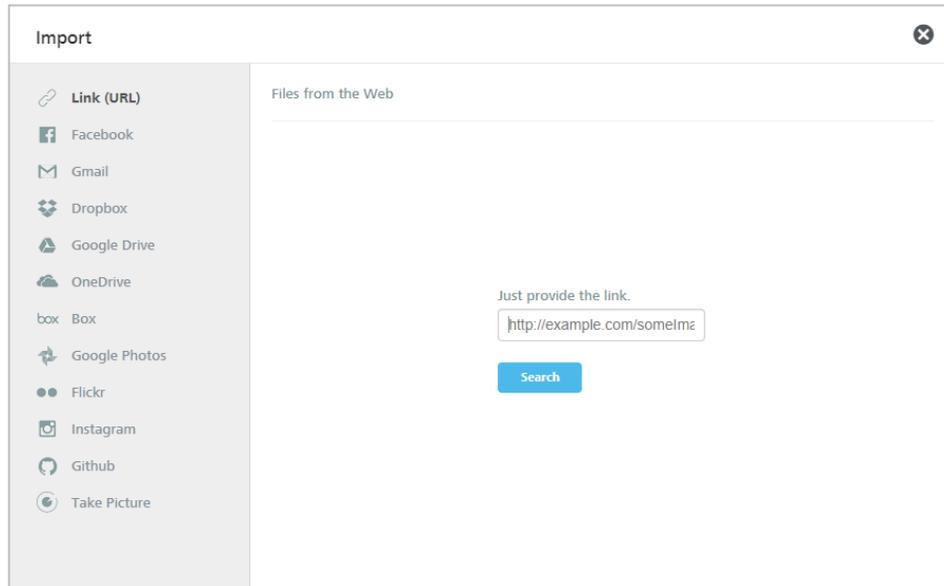


- **Upload:** This allows you to upload any image that you have on your computer. Once the image has been uploaded, it will appear in your library for use.



**NOTE:** It is also possible to upload other types of files to use in links on your templates, but as we are replacing an image, you should only upload images now. We will discuss uploading other file types later in the guide.

- **Import:** If your images are on a website or on your social media account and you want to import them directly, you can do so using the Import button. When you click this you will see the following:

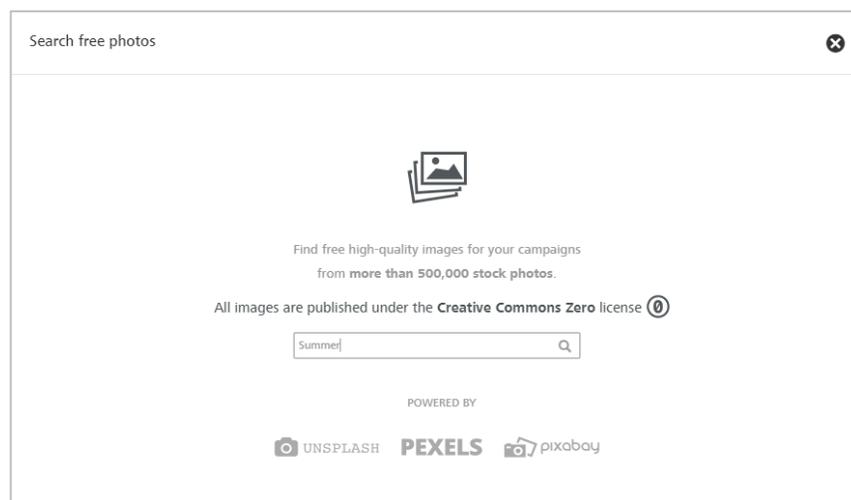


Choose the appropriate option on the left hand side, then follow the on-screen instructions.



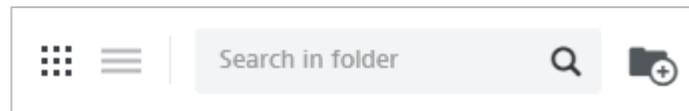
**NOTE:** This option **MUST** only be used to access your own images, it should **NOT** be used to take images from other websites that do not belong to you or your company.

- Search free photos:** This option allows you to search an online database of over 500,000 free stock images that you can use in any of your templates. This is particularly helpful if you are looking for more generic images, such as a summer scene. When you click this option, simply type the keyword you want to search for into the box and hit Return. Once you find an image you like, move the mouse over it and click **Import** to add it to your library.



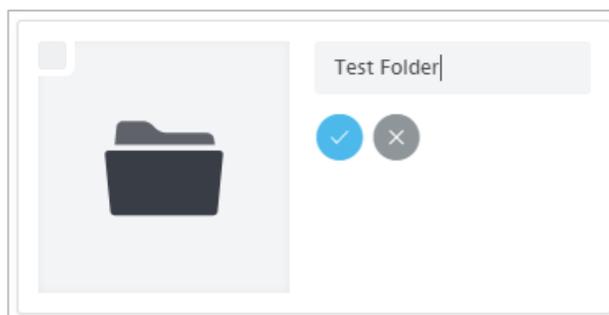


You may find over time that your File manager becomes quite crowded as you upload more and more images to it. There are several tools provided that can assist you in organizing your templates in the top right corner of the File manager:



From left to right, these options allow you to display your images in a grid view, display your images in a list view, search for keywords within your images, and create a new folder.

Folders are especially helpful as you could create one for each campaign, or for a particular theme or product that you wish to send marketing communications about. When you create a new folder, you are prompted to give it a name. Once created, click the folder to open it up.

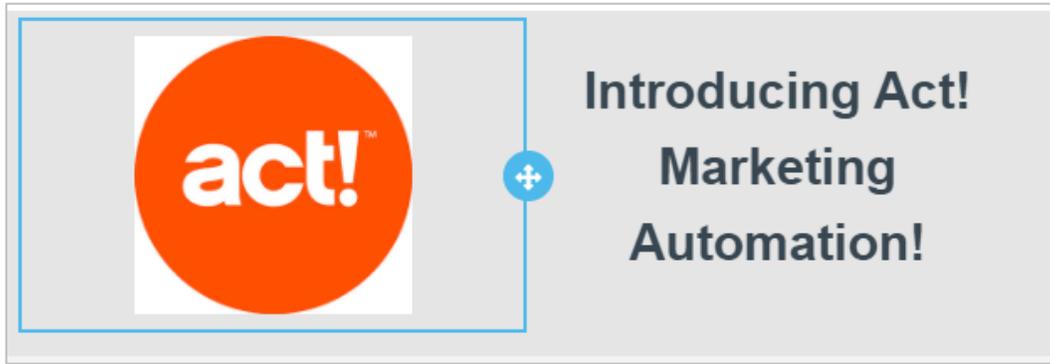


Once you have opened your folder, any images that you now upload (or images you import, or images that you search for) will now appear in this folder instead.



**NOTE:** Images cannot currently be moved between folders.

Once you have selected an image that you want to use in your library, move the mouse over it and click **Insert** to replace the image in your template.

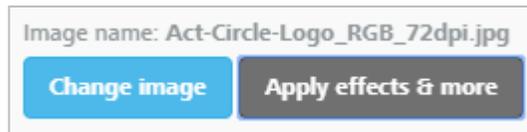


Now that you can see how the image appears on your actual template, you might choose to make changes to it.



**NOTE:** If you only want to resize the image, remember that just beneath the **Auto width** option under the **Content Properties** you can very quickly and easily amend the image size.

To edit your image, make sure you have clicked on it to highlight it, then choose the option to **Apply effects and more** from the Content Properties:



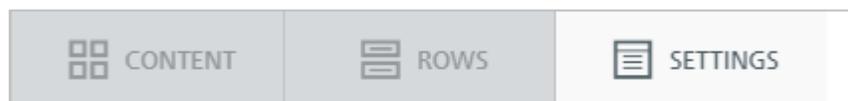
This will launch the image editor directly within Act! Marketing Automation with the following effects that you can apply to your image:



Once you are happy with any amendments that you have made, click **Save** in the top right corner.

## Amending the Layout of the Template

On the right side of the Drag and Drop editor, you will see three tabs:



These tabs are your primary tools to amend the layout and design of the template. So for example, these allow you to change the width of the template, to add in new blocks of

content that you can then amend, or to change the colors you are using. We will begin by looking at the functionality of each tab.

## Settings

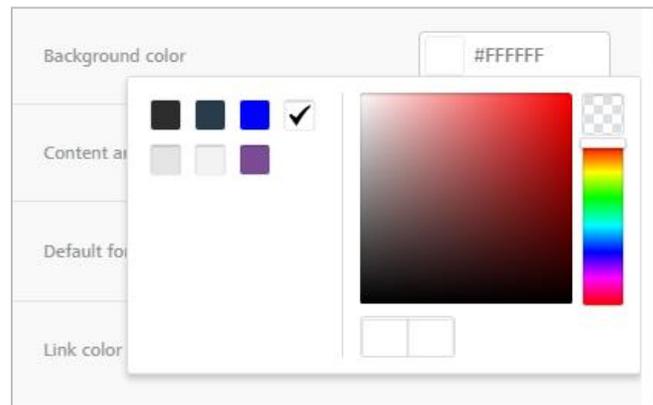
This tab has several controls that determine universal settings for your template.

CONTENT	ROWS	SETTINGS
GENERAL OPTIONS		
Content area width	500px	- +
Background color	#FFFFFF	
Content area background color	transparent	
Default font	Arial	⬇
Link color	#7c4b96	

- **Content area width:** This allows you to change the content width of your template, i.e. the part of the template that will be actually displayed when delivered to your contacts. Whilst this can be amended, as a rule we would recommend that the default for the template is not changed. The reason behind this is that the default is designed to make sure that the template displays optimally when accessed through a mobile device.
- **Background color:** This option allows you to change the background color of your whole template. Please note, when this option is changed you may not notice a great deal of change to the template you are working on. This is because individual rows can have their own background color applied which takes priority over the template background.



**NOTE:** When changing any of the colors on your template, if you know the hexadecimal reference number for your color (if your company has a marketing department they may well know this), then you can click on the reference and type it in. Otherwise, if you click on the color itself, you can use the color selector pictured below.

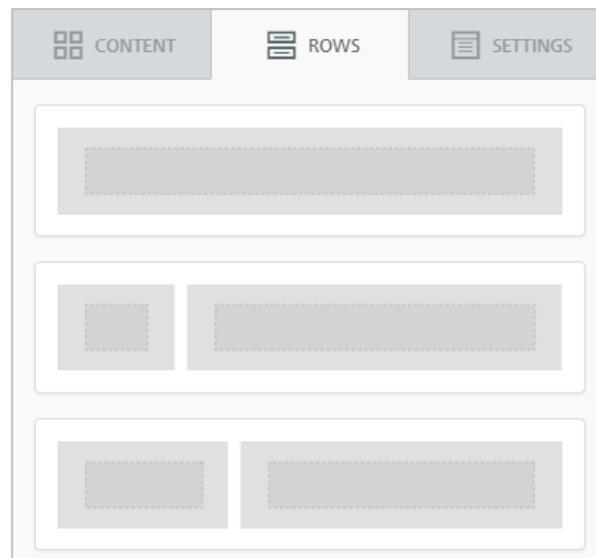


- **Content area background color:** You can change the background color for the specified content area using this option. The default is transparent which means the background color shown will be that of each individual row.
- **Default font:** This is the default font that will be used throughout your template. The font can be changed on an individual block basis if you wish.
- **Link color:** The default color of any links that you add to your template. Again the link color can be changed on an individual basis.

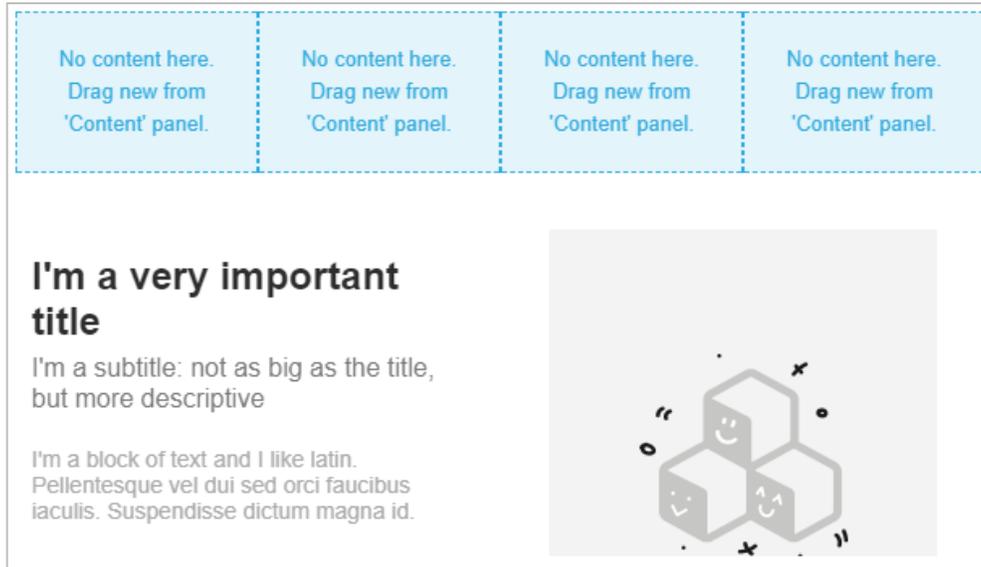
## Rows

Previously we discussed how to amend the existing content on your template and replace it with your own information. The rows tab allows you to make changes to the template by adding in your own completely blank rows which you can then begin to fill with your own chosen content.

When you click on the Rows tab, you will see various row configurations that you can use:



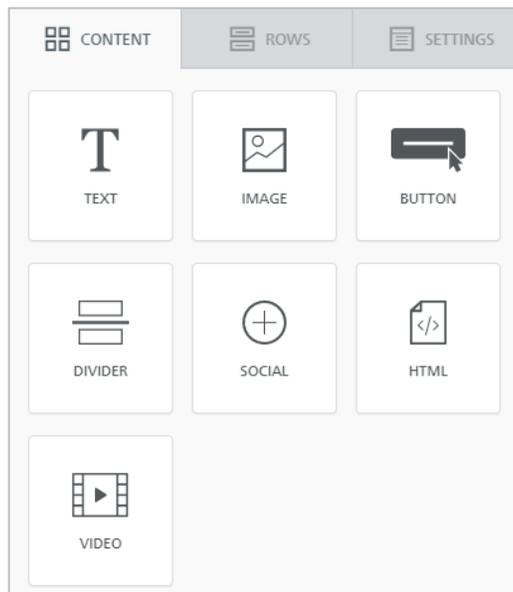
You can add a row of between one and four blocks to your template. To do to, simply click and drag the row configuration you want to use onto the appropriate part of your template, then release the mouse button.



once you have added a row, you will then need to choose the content that you want to add to it.

## Content

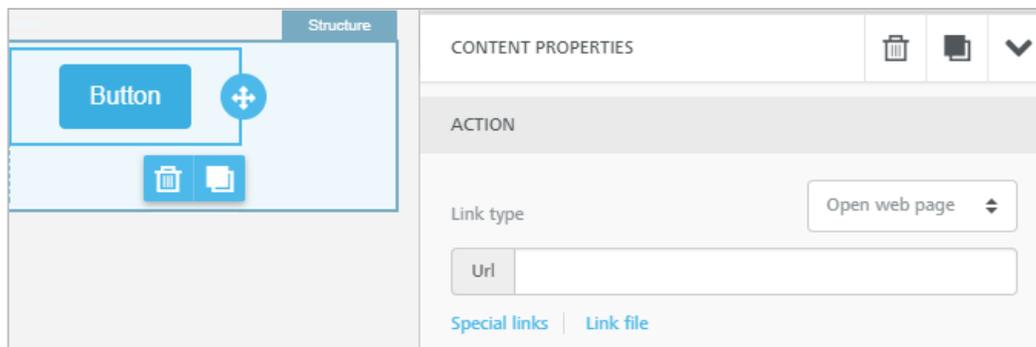
As we have already seen, if you click on a block on your template, you will see **Content Properties** on the right hand side. However, if you click the **Content** tab once again (or if you simply don't have a block selected), you will see the following options:



Any of these options can be dragged and dropped on top of a blank block (as when you have added a new row to your template) to add the content that you want to use. They can also be dropped on top of existing blocks if you wish to add them on top (so for example, if you wish to add a text block immediately above one of your existing images).

The types of content available are:

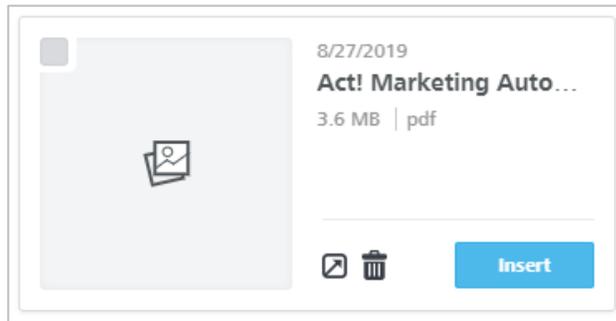
- **Text:** Adds a block that allows you to add text to your template.
- **Image:** Adds a block that allows you to add an image to your template.
- **Button:** Adds a button to your template, typically used to link to a website, but can also be used to link to a downloadable file as well. To use this, click and drag the button onto the appropriate place on your template, then click the block to show the Content properties.



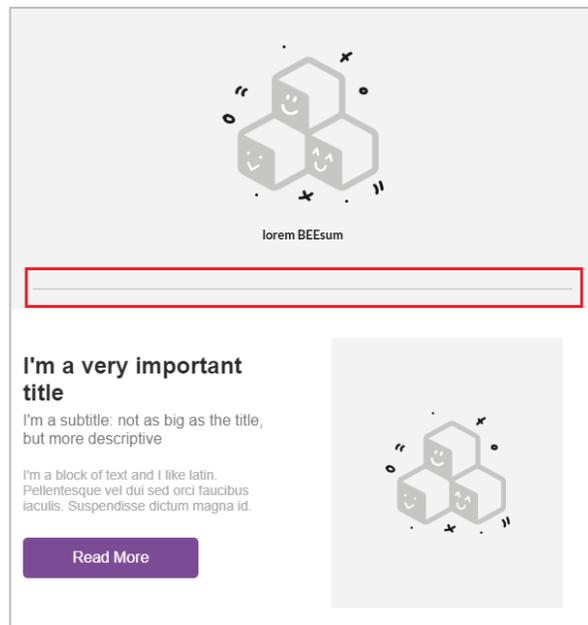
Earlier we looked at the possibilities you have when linking an image, specifically the ability to open a web page, send an email, make a call or send an SMS message. All of these same actions exist for a button as well.

On top of that, you also have options for **Special links** and **Link file** at the bottom of the screenshot above.

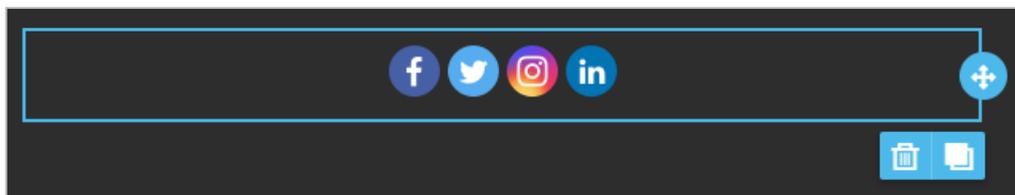
- **Special links:** Allows you to add options to view the email in a browser, or to unsubscribe. We will look at unsubscribe options later.
- **Link file:** Allows you to add a file to your template that can be downloaded by your contacts (for example, this could be a catalog of your current products). When you click **Link file**, you will be taken to your File manager as we have discussed already, but now you can upload any file type such as PDF files or Word documents.

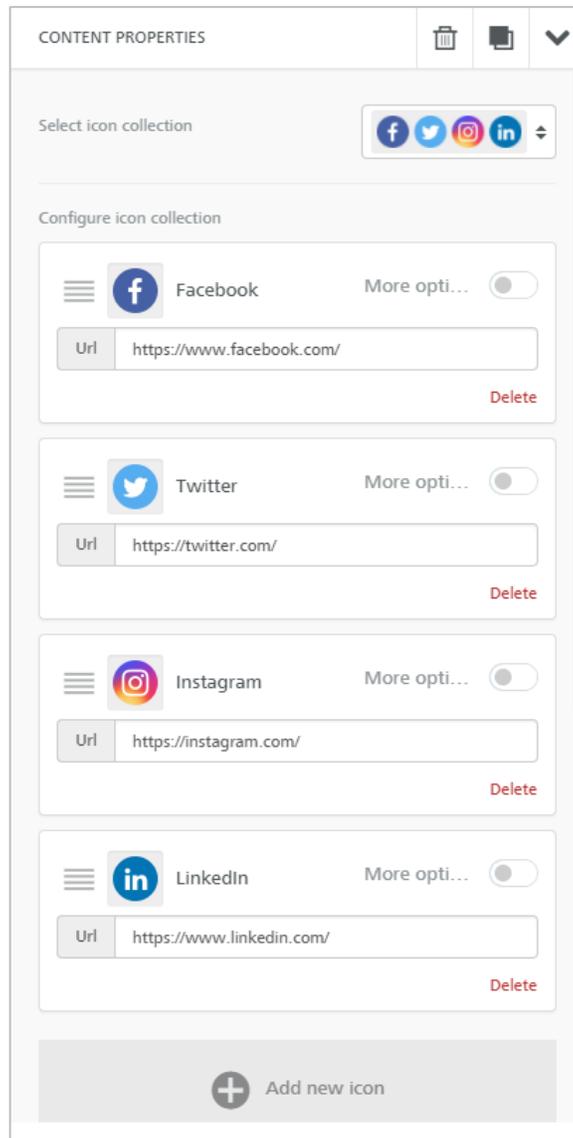


- **Divider:** Adds a horizontal line to help separate out your blocks. You do not need to add this to a blank block, rather this would be dragged and dropped between your rows to divide your template into sections.



- **Social:** This option inserts icons to take your contacts to your social media accounts. Once the content has been added to your template it, click the block to display the Content Properties.





You can now choose the icon collection you wish to use (the dropdown here presents various themes for the icons, such as square icons or grayscale), configure the URLs that direct to your social media pages, change the order of the icons, and also add and remove icons as you choose.

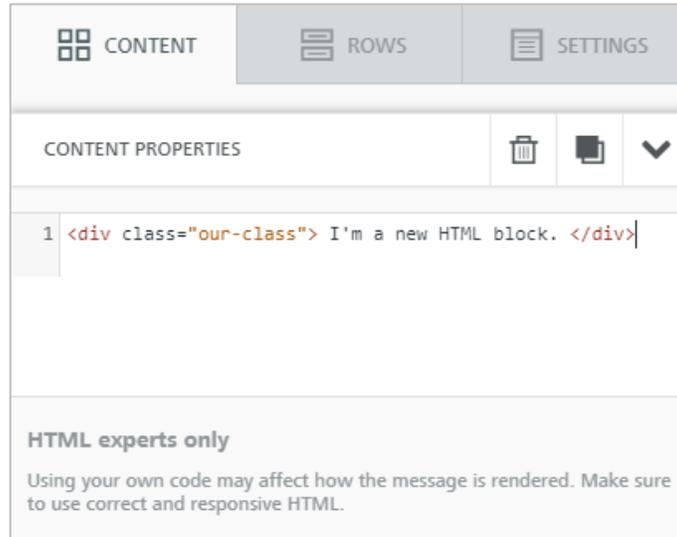
To configure the URL of the icons, click into the URL box and type in your URL, or copy and paste it if you prefer.

To delete a particular icon, simply click the **Delete** button in the corner of the appropriate icon.

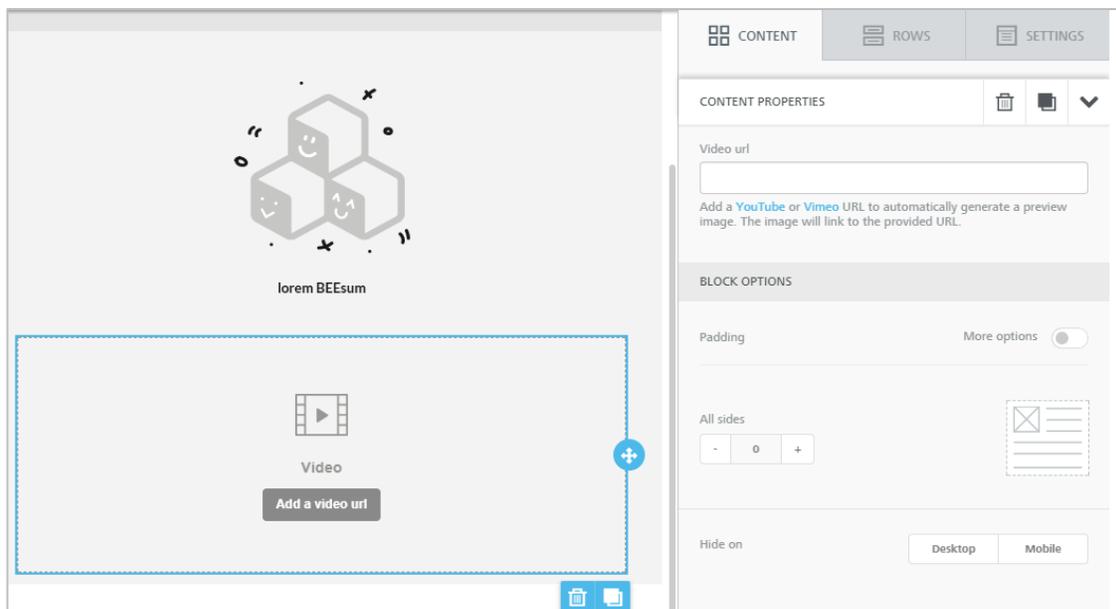
To change the order of the social media icons, click and hold the  button of the icon you wish to change, then drag it up or down the order.

To add a new icon, click the large **Add new icon** button to choose from a large selection of social media options, or even add your own custom icon if you prefer.

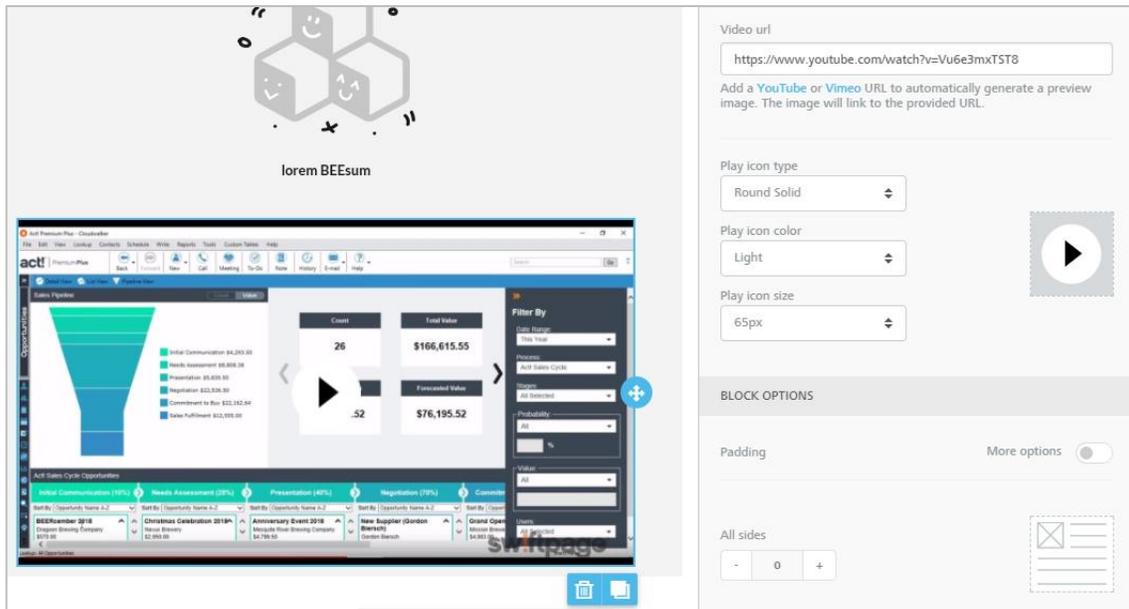
- HTML:** This option inserts an HTML block into your template. This is to allow those with HTML expertise to add in their own code to a pre-existing template. It is recommended for HTML experts only. Once the block has been added to your template. Click the clock to see the Content Properties and add the HTML code that you want to use.



- Video:** This option allows you to add a link to a video on your template. Once again, clicking on the block will then show the Content Properties.



Currently, you must add a URL from either YouTube or Vimeo. Once you have copied and pasted your URL into the box, hit return and you will see the block update with an Image taken from the video itself. You will also see a play icon has been added to the video block making it very obvious exactly what the content is in your template.



Video url

Add a [YouTube](#) or [Vimeo](#) URL to automatically generate a preview image. The image will link to the provided URL.

Play icon type

Round Solid

Play icon color

Light

Play icon size

65px

BLOCK OPTIONS

Padding More options

All sides

If you would like to amend the play icon at all, you will now see options within the Content Properties to do so.

## Template Footer

All templates **MUST** include an option for contacts to unsubscribe from receiving any further marketing communications. To this end, each of the pre-built templates that you can use to start working with the Drag and Drop editor come with a footer that contains this option already.



You will notice several values in brackets as well. Whenever you see {} brackets being used, this indicates the presence of a **merge field**. Merge fields allow you to pull information from your AMA account, and even from your Act! database to be used in your templates.

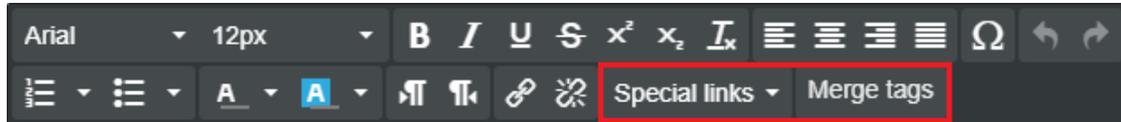


**NOTE:** At this stage it is not possible to add merge fields from your Act! database. This is because we are creating a template right now which could potentially be used against any of our Act! databases. Merge fields from Act! can be added when we create an actual campaign and choose to use this template which we will see later in the guide.

It is a good idea to keep these fields present in your template as again a footer that describes who the company is will give the contact far more confidence that they have

received a legitimate email that they may want to read.

If you wanted to add the merge fields or the unsubscribe link anywhere else on your template, click into a text block that you wish to use, then choose **Special links** to add the unsubscribe option, or **Merge tags** to add merge fields from your AMA account.



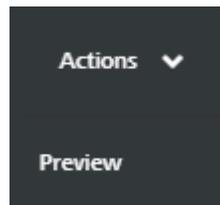
## Save and Preview Your Template

Once all changes have been made to your template, you can save it by clicking the **Save** button in the top right corner.

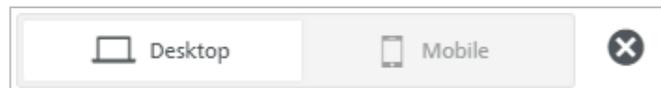


After doing this, it is also a good idea to **preview** your template as well. This will allow you to see how your template will appear to contacts who read it on both a desktop and a mobile device.

To show the preview, click the **Actions** menu in the top **LEFT** corner of the screen, then choose **Preview**.



In the top right corner, you will see options to swap between **Desktop** and **Mobile** views.



Once you are satisfied with the preview, or if you want to make any changes, click the X icon in the top right corner.

Now that you are satisfied that your template is complete, click the **Actions** menu in the top **RIGHT** corner of the screen, and choose **Return**.

# WYSIWYG Editor

When we discussed the creation of a new template earlier, we mentioned that as well as the Drag and Drop editor, there is a second editor available. This is called the WYSIWYG (What You See Is What You Get) editor.



**NOTE:** The WYSIWYG editor is available on the **Premier Tier and above**.

To use this editor, begin creating a new Marketing template as demonstrated previously, but make sure to choose WYSIWYG as the editor.

The screenshot shows a 'New Template' dialog box with the following fields and values:

- Name: WYSIWYG Practice
- Type: Marketing
- Editor: WYSIWYG
- Name: One Column

Buttons: Create, Cancel

You will notice that the bottom field where you would normally choose a template is set to One Column. The provided templates are used with the Drag and Drop editor so are not available here.

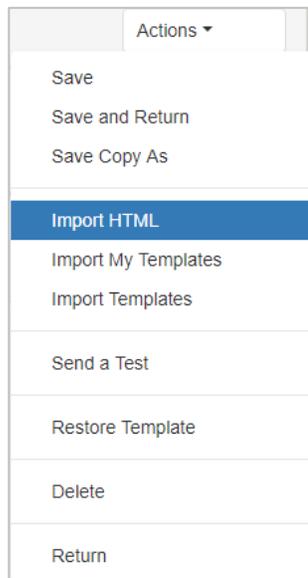
The primary purpose of the WYSIWYG editor is to allow those with **HTML** editing experience to have free reign in their template creation. As we have seen, HTML blocks are available in the Drag and Drop editor, but the WYSIWYG editor allows a person to build their entire template using their HTML skills.

To swap to the HTML view, click the HTML button near the bottom of the editor.



The WYSIWYG editor also allows you to **directly import your own HTML templates** that you may have created before beginning to use Act! Marketing Automation.

To do this, click the **Actions** menu in the top right corner, and choose the option to **Import HTML**.



You will then be prompted to choose your HTML file for upload.



**NOTE:** After importing your own HTML template you certainly can amend it using the AMA editor, however we would recommend being cautious about this as importing an HTML template into a different editor can cause issues with the code. If you do need to make large scale amendments to your pre-existing HTML template, we would recommend you do so within the original editor, then import the template again into AMA.

If you would like to import some of the pre-existing AMA templates that come with the program, you can do so by clicking **Actions** and selecting **Import Templates**.

If you have already created some of your own AMA templates and you would like to import one for use here, you can do so by clicking **Actions** and selecting **Import MY Templates**.

## Sales Templates

So far we have looked at creating a Landing Page template earlier in the course, and we have looked at creating Marketing templates. We will now look at creating a **Sales** template.



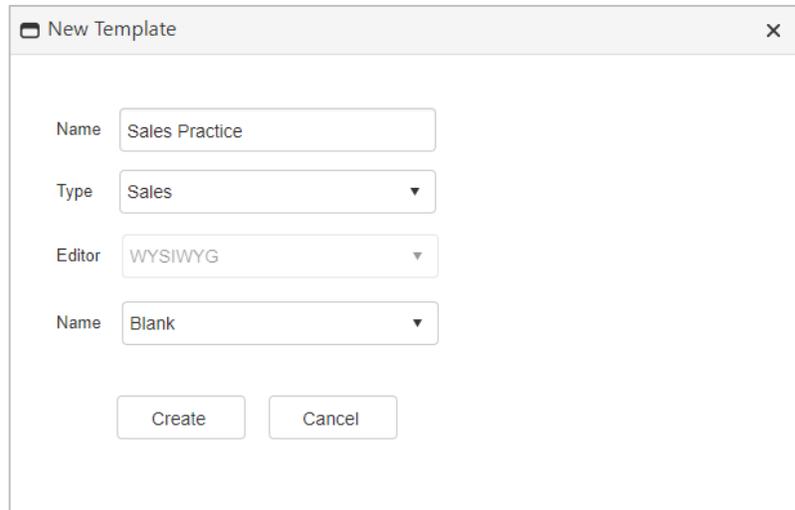
**NOTE:** Sales templates are available on the **Premier Tier and above**.

A Sales template makes use of the same WYSIWIG editor we have already seen, so it does have the same option to switch to the HTML view and construct an HTML template as we have just discussed.

The key difference though, is that new Sales templates are always completely blank, when you first create them there is no existing material for you to change. This is because a Sales template is typically used to create very simple, text based communications to your contacts. So for example, if you wanted to send an automatic response thanking a contact for signing up, you may prefer to use a Sales template to do this rather than creating a more marketing based Drag and Drop template.

Therefore whilst it is certainly possible to use the HTML editor within a Sales template, this is not the typical usage, and a knowledge of HTML is not required to create a Sales template.

To demonstrate this, we will create a practice Sales template now.



New Template

Name Sales Practice

Type Sales

Editor WYSIWYG

Name Blank

Create Cancel

Notice that in the screenshot below we have remained in the **Design** view when editing this template. Doing this allows us to use the controls along the top of the template to create a quick and easy message to send to our contacts. These controls should be familiar with anyone who has used Word Processing software before such as Microsoft Word.

www.act.com.' At the bottom are buttons for 'Design', 'HTML', and 'Preview'. Below the 'Design' button is a link 'P > RemoveElement'." data-bbox="196 436 799 656"/>

Assets Tracked Asset Merge Fields

Thank you for signing up to our newsletter!

For more information on our current range of products, please see our website [www.act.com](http://www.act.com).

Design HTML Preview

P > RemoveElement

Once you are satisfied with the design of your template, go to the **Actions** menu in the top right corner and choose **Save and Return**.

# Summary

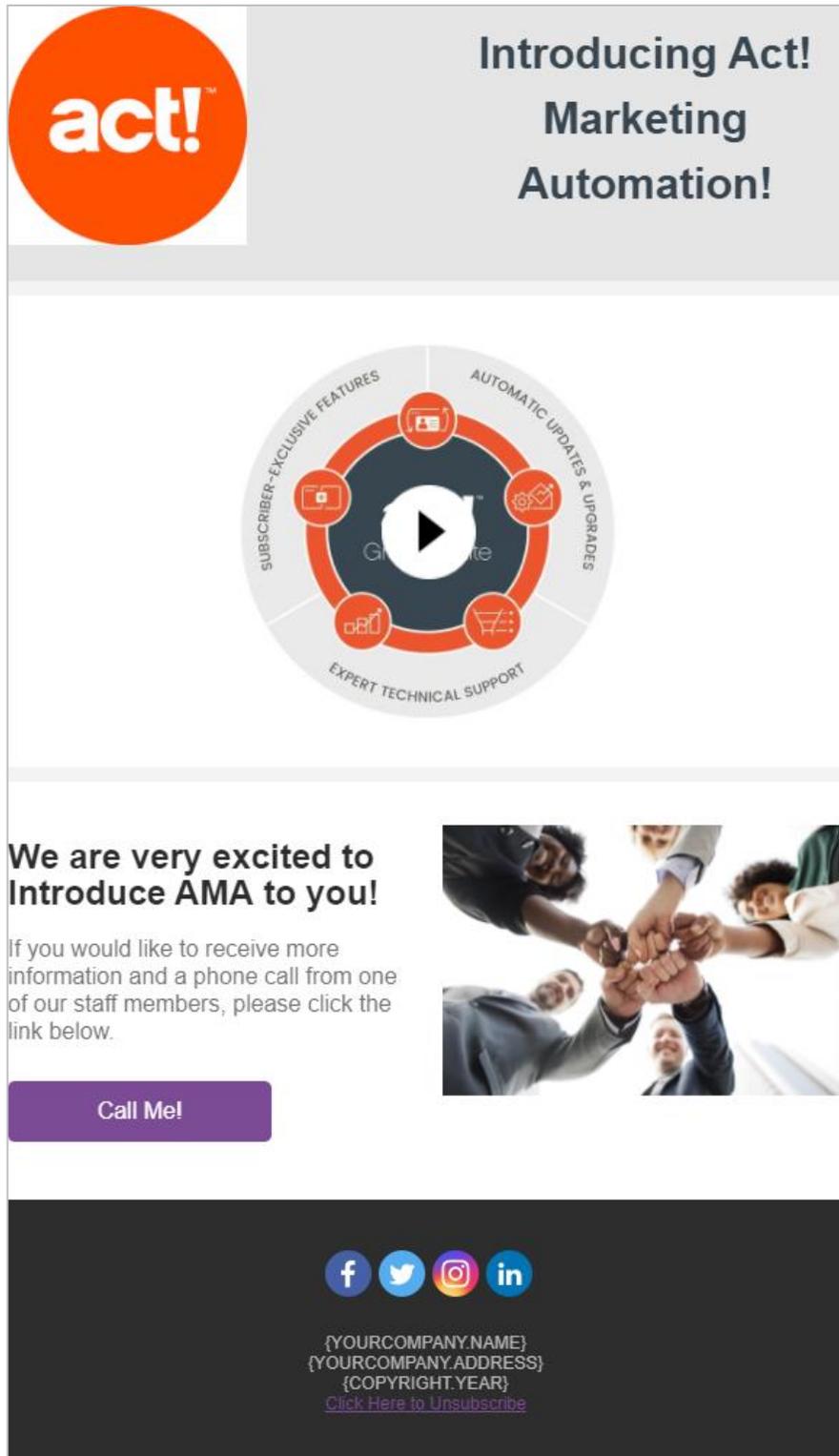
In this Lesson you have learned how to:

- Create a Marketing Template
- Replace existing content with your own
- Amend the overall layout of a template using rows and blocks
- Apply the various content choices to your template
- Understand the usage of a Sales Template

# Checking Your Knowledge

Practice 

Using the instructions you have received in this lesson, create a **Marketing Template** using the **Drag and Drop** editor to recreate a template similar to that in the screenshot below (feel free to replace the actual content with your own information):



**act!**

## Introducing Act! Marketing Automation!

SUBSCRIBER-EXCLUSIVE FEATURES

AUTOMATIC UPDATES & UPGRADES

EXPERT TECHNICAL SUPPORT

**We are very excited to Introduce AMA to you!**

If you would like to receive more information and a phone call from one of our staff members, please click the link below.

[Call Me!](#)






{YOURCOMPANY.NAME}  
 {YOURCOMPANY.ADDRESS}  
 {COPYRIGHT.YEAR}  
[Click Here to Unsubscribe](#)

Points to follow:

- You may wish to start with the **Wireframe Article** template, though you do not have to.
- Make sure to include your own company logo in the header.
- Include a link to a video if you have one, otherwise you may wish to use an appropriate picture.
- You can see that a button has been added to this template which links to a URL. Please make sure to add **at least ONE link** to your own template. The actual destination of the URL is not important (so you could simply use [www.act.com](http://www.act.com) or even [www.google.com](http://www.google.com) if you wish), but it will be helpful in demonstrating further features later in the guide.

# Drip Marketing

## Overview

In this lesson, we will build on the previous training by creating an actual Drip Marketing campaign in order to begin marketing to our contacts. We will look at how to set up a campaign, how to create and amend a campaign workflow, and see how the automated nature of the product will save your business a huge amount of time and resources once your campaigns are set up.

## Objectives

After completing this lesson, you will be able to:

- Create your own Drip Marketing campaign
- Change the workflow by adding your own steps to it
- Grasp the importance of the Decision step and how this can be used to automate your processes
- Understand the various options available when creating your own workflow steps



Please see the video library **Drip Marketing** which contains information relevant for this section of the training: <http://training-act.com/act/act-lib-ama/?courseId=dripmarketing&>

# What is Drip Marketing?

At its most basic, Drip Marketing is a marketing strategy that allows you to send a selection of pre-designed templates to your contacts in a prescribed order or at specified intervals. For example, if you were about to release a new product, you might want to communicate this to your contacts. With Drip Marketing you could send an email a few months in advance teasing the new release, then another closer to the time to build up anticipation, yet another on the day of release perhaps with a special offer included, and finally another email after the release detailing positive responses to the new product.

That example is just one way that you could use Drip Marketing, however with Act! Marketing Automation you can achieve far more than that. You can create campaigns that change their behavior depending on how the individual contacts interact with the communications you send out. Expanding on the above example, you could have AMA look at whether each individual has opened the first email, and have it re-send to those that haven't opened it. Or you could include links on your template that when clicked will automatically book in a call with that contact in your Act! database without any further interaction from yourself. Other options available include automatically creating an Opportunity in Act! for the contact, or entering the contact into another campaign automatically. The amount of possibilities is really enormous, only limited by your own imagination as a marketer.

The real key to getting the most out of AMA is the automated nature of the product. Through well-crafted Drip Marketing campaigns you can automate processes that would take a huge amount of time and effort if they were to be done manually. That's where you will see real value in using the product, by getting it to automate as much as possible.

To that end, we will discuss how to set up a basic Drip marketing campaign, then explore the options available to really highlight those automated actions available.

## Creating a Drip Marketing Campaign

### Accessing Drip Marketing

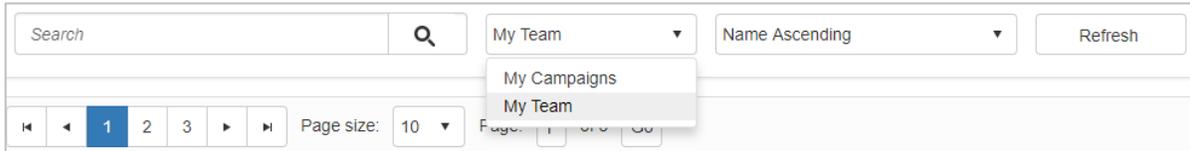


**NOTE:** Before accessing Drip Marketing, make sure you are working in the Act! database that contains the contacts you want to market to. This is because when you set up the campaign you will need to specify the contacts that you wish to send your marketing communications to, therefore you must be in the correct database to do this.

To access the Drip marketing section, click the **Drip Marketing** icon in the AMA navigation bar.



You will then see a list of all of the campaigns you have created. At the top of the page is a search bar allowing you to easily find any of the campaigns you have created. The second dropdown allows you to apply a filter of **My Team** (which will show all of the campaigns that all of your AMA users have created) or **My Campaigns** (which will only show the campaigns you have created yourself).



**NOTE:** Over time you may end up with a large amount of Drip Marketing campaigns. Because of this, you should pay close attention to naming conventions so that you can easily find your campaigns later if needed. Including the year, month or season are good ideas, as well as a description as to what the campaign will be used for, for example you could use a naming convention such as “Summer 2019 v22 Prospects”

## Creating a Drip Marketing Campaign

To summarize what we have accomplished so far in our training guide, we have:

- Set up our AMA account.
- Created a Landing page to add new prospects into our Act! database.
- Created an email template that we want to send to those prospects.

We are now going to create a campaign that will make use of the template we created, and will be directed towards those new prospects we got from our Landing Page.

To begin creating a new campaign, click the **Actions** menu in the top right corner, and choose **New Campaign**.

Create New Campaign
Actions ▾

*Campaign Name*

*Smart Tags*

*Campaign Template*

A marketing template allows you to define an email series with timed intervals between each step. Promotional marketing material will require you to have an unsubscribe link and your company address.

*Number of Emails in Campaign*

Please select the number of emails that you would like in this series. You can always add or remove emails later on.

*List Name*

This campaign will monitor subscribers that are new to the list or that are removed from the list. If a subscriber is new to the list, then they will automatically be placed into this campaign.

*Campaign List Sync has been moved to its own section. After creating the campaign, access 'Actions - Campaign List Sync'*

*From Name*

This is the name and email address that email will come from. You can specify a common email address like marketing@acme.com or you can personalize the from address from the account manager of the lead or contact record.

*Default From name*

This is the name your emails will come from. Use something your subscribers will instantly recognize, like your company name.

*Default From email address*

This is the sender email address. The domain of the sender must match that of your email server.

*Reply To Address*

The reply-to email address.

The following fields should be completed:

- **Campaign Name:** This is where you will enter a name for the specific Drip Marketing campaign you are creating. As mentioned earlier, it would be useful to come up with a specific naming convention for your campaigns to make it easy to locate them later.
- **Smart Tags:** Smart Tags are essentially keywords to assist in your searching. Make sure to hit **Return** on your keyboard after each keyword that you enter. In the screenshot above, **Summer** and **2019** have been added in as separate values.
- **Campaign Template:** There are several available templates to help you get started in creating your campaign. Strictly speaking, the option you choose here is not critical in that you can amend any of the templates completely anyway, but it will help give you a starting structure for the campaign. The options available are:
  - **Marketing:** This is the most commonly used template and lets you begin with a basic structure that you can completely configure to your own needs. This is the template we would recommend using for the majority of

your campaigns.

- **Event Marketing:** This allows you to set up a campaign based around a particular event that you have coming up (perhaps a roadshow or conference). You would specify the event date, then set up your campaign to promote that event.
  - **Sales Pilot:** A Sales Pilot campaign allows you to specify both emails and phone calls as part of your campaign, with the idea that each step must be completed before the next one takes place. In that way, each call would follow on the back of an email, giving it specific context.
  - **Copy Campaign:** This option allows you to copy one of your own campaigns that you created earlier and use its structure in this new campaign.
- **Number of Emails in Campaign:** Specify the number of emails you plan to send out during your campaign. Again this can be fully customized during the creation process, so you do not need to be precise here.



**NOTE:** If you have chosen to Copy a campaign, this field will allow you to choose which campaign you would like to copy instead.

- **List Name:** This field allows you to select the **Act! Group** you would like to enter into your campaign. This is the primary way you add contacts to any of your campaigns (there are other ways to do this, you can add contacts automatically when they complete a Landing Page for example) so it is important that you are familiar with setting up groups in Act!. For more information on how to set up Groups, please see the following video library:

<http://training-act.com/act/act-lib-cloud/?courseId=groups&>

In particular, review the video on **Creating Dynamic Groups** as this allows you to create self-sustaining groups that automate the process of collecting your contacts together.

In our specific example, if you remember back to **Landing Pages**, we created a Landing Page that allowed a contact to specify which product they were interested in, and this information mapped back to a field in the Act! database. Therefore, we have created a **Dynamic Group** that automatically collects together all contacts that have selected **Product 1** in that field. With this set up and managing itself, it is the perfect group to add to our campaign.

- **From Name:** This is a field that is not currently in use with an Act! database, therefore the only option available will be Common Email Address. In terms of who the emails actually come from, you can specify further choices below.
- **Default From name:** Here you can specify the name that will appear next to your email when the contact receives it into their inbox. It is important here to use a name that immediately identifies exactly who you are in this field.
- **Default From email address:** This is the email address that the email will have come from when it lands in a contact's inbox. The domain needs to match the

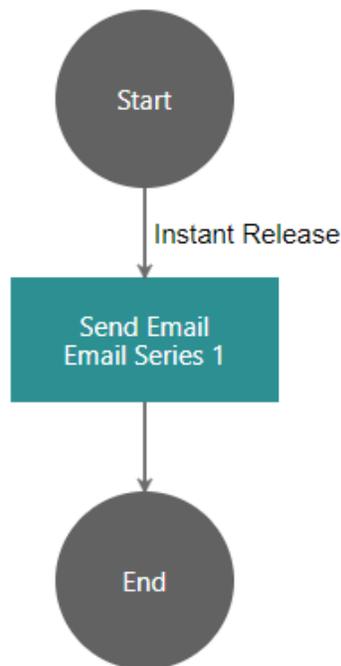
domain you specified when you set up your Act! Marketing Automation account. You can check this by going to the **Admin** section of AMA, and choosing **Account Configuration**.

- **Reply To Address:** If a contact were to directly reply to your email, this is the address those replies will be returned to. Again the domain needs to match the domain you specified when you set up your Act! Marketing Automation account.

Once you have selected all the options you wish to use, click the **Actions** menu in the top right corner and choose **Create**.

## The Drip Marketing Campaign Workflow

If you have chosen a **1 email Marketing campaign**, your workflow will look like this:



All campaign workflows must begin with the **Start** step, and end with the **End** step. Anything between those two points are steps that will take place in the course of your campaign. In this case there is only 1 step, to send an email. So once the email we wish to send was selected, and this campaign were to be started now, a single email would be sent to the group specified when we created the campaign, and then the campaign would end.

This is as simple a campaign as it is possible to have in Act! Marketing Automation, and there is certainly value in creating a campaign like this. In this section we will look at how we can go from a single email campaign to a fully automated multi-step campaign instead.



**NOTE:** If you are using the **Professional** level of Act! Marketing Automation, you have access to Email steps only. This allows you to create very valuable multi-template email campaigns, however you will not be able to get the benefit of adding other automated actions such as adding a Decision step, an Opportunity or an Activity.

The first thing we want to do is establish exactly what we would like to achieve in our campaign. In our example, we will begin with a simple campaign, then we will look at adding in more complex decision making afterwards. For now, we want to achieve the following:

- Send out a marketing email advertising our new product as soon as the campaign starts.
- Have the program establish whether or not the contact opened the email within 1 week of it being sent out.
- If they did not open the email, we want to resend it with a slightly different subject line.
- If they did not open the second email within 1 week, we want to automatically update a field in Act! advising that they did not open the email we sent, and we also want to receive a notification advising us of this.
- If the contact did open either the first or the second email, we want to automatically create an Opportunity for them in Act!, and update a field to specify that they have opened the email.

Even with this simple list of requirements, consider just how much work and effort is being saved. Instead of simply sending an email to your contacts, you can have Act! Marketing Automation check for you whether it was opened, re-send if required, and even automatically create Opportunities, send notifications and update fields in your database as well. That is work which would require a huge amount of effort to perform manually, whereas creating a campaign in AMA will only take a few minutes.

We will go through creating the workflow step by step and discuss exactly where we are at as we do so.

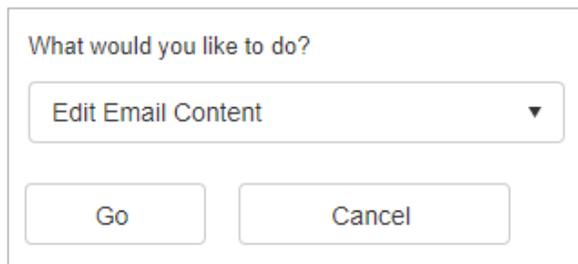
## Email Step

The first thing we need to do is to choose the email that will be sent in our first step. To do that, click on the **Send Email** step.



Send Email  
Email Series 1

This will present a dropdown. Make sure **Edit Email Content** is selected then click **Go**.



What would you like to do?

Edit Email Content ▼

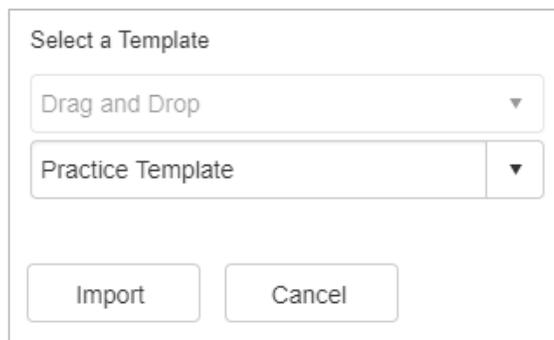
Go Cancel

This will take us directly into the **Drag and Drop** email editor that we have seen previously. It is here that we can import the template that we created earlier.



**NOTE:** If you have created a template using the WYSIWYG editor (or a sales template) that you would like to use, click the **Actions** menu in the top right corner, and choose the option **Switch to WYSIWYG**. From there you will be able to import your WYSIWYG template.

To import your template, click the **Actions** menu in the top right corner, and choose the option **Import MY Templates**.



Select a Template

Drag and Drop ▼

Practice Template ▼

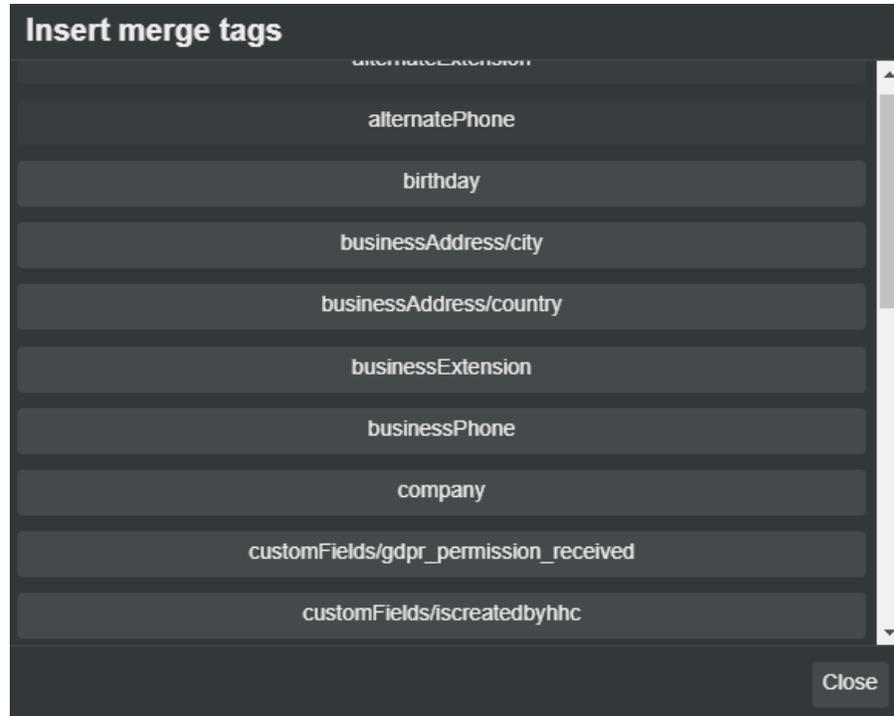
Import Cancel

Choose the template you would like to use from the dropdown list, then click **Import**.

Once the template has been imported, you might want to make changes to it for this specific email in your campaign. Making changes now will **NOT** affect the template you created earlier, you will still be able to import that into any other email steps you wish in the future.

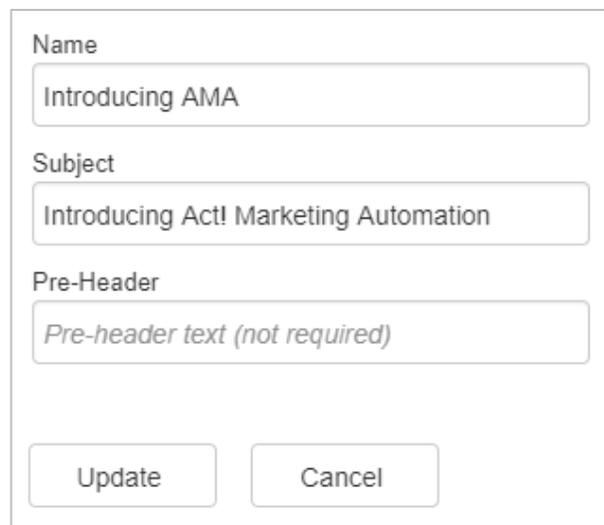


**NOTE:** One change you may wish to make is to add **Merge tags** to your template. This allows you to pull information directly from the individual contact's record who will receive your email. For example, your email might begin with "Dear {CONTACT.FIRSTNAME}" where the bracketed section would merge in every contact's first name when they receive the email. To do this, click into any text box as you have seen before, then click **Merge tags** to see a list of fields you can add. Simply click the field you wish from the list and it will be added to the template. **Remember the fields shown will be from the database you are currently working in when creating your campaign.**



Once you are happy with any changes that you have made, you will need to add a **Subject** for your email. This is an important step as your campaign will not be able to be started without it.

To add a subject, click the **Actions** menu in the top right corner, and choose **Properties**.



- **Name:** This is the name of the step that will appear on your workflow, helping you to identify at a glance what this specific step is for.
- **Subject:** This is the subject of the actual email that the contact will receive. It is

important to make sure that all of your email steps have an appropriate subject added when designing your campaigns.

- **Pre-Header:** This is an optional field to insert text at the very top of your template before the header. This can be helpful to identify yourself to anyone who might not download pictures automatically and therefore might not realize who the email is from.

Once you have entered a Subject, click **Update**, then in the **Actions** menu in the top right corner, choose to **Return**.

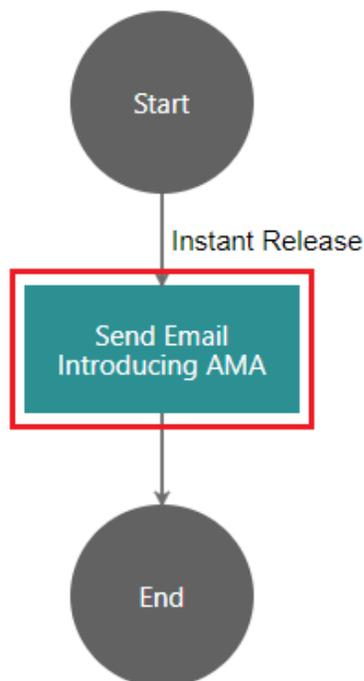
## Adding a Decision Step



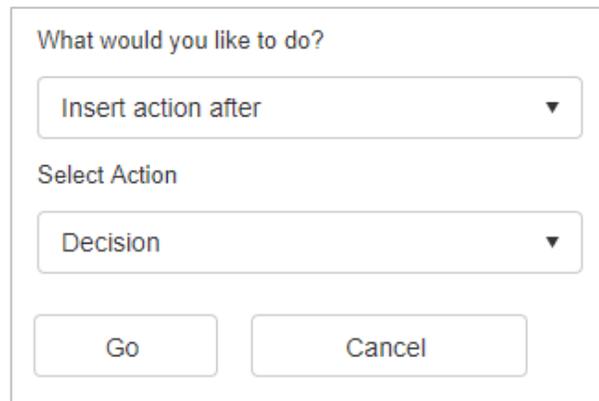
**NOTE:** The option to add a decision step is available on the **Premier tier of growth Suite and higher**.

Now that we have configured the email that will be sent, we have completed the first bullet point in our plan, which was to send out a marketing email to our contacts. The next step we need to add is to have the program itself look at whether or not the contacts have opened the email once 2 weeks have passed. We do this by adding a **Decision step**.

To add a new step, go back to your workflow, and once again, click on the **Send Email** step.



In the dropdown this time, choose the option **Insert action after**, then choose **Decision** in the **Select Action** box.



What would you like to do?

Insert action after ▼

Select Action

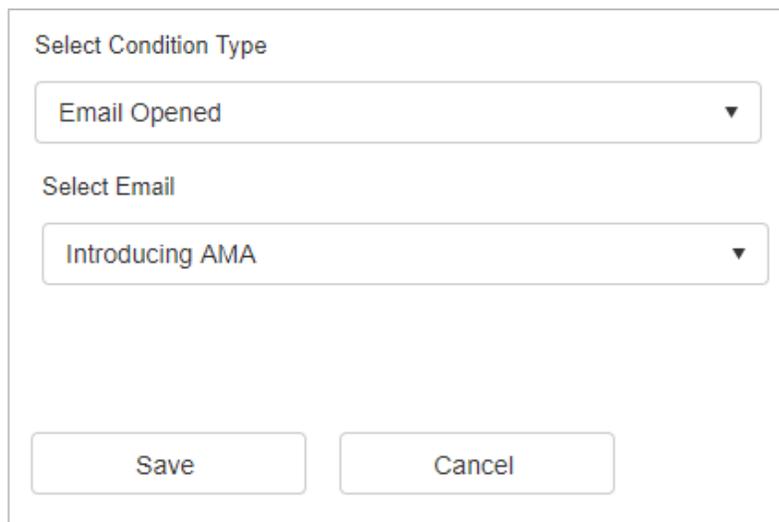
Decision ▼

Go Cancel

Click **Go** to proceed.

The next screen will prompt you to select the specific decision that you want the program to make. In the case of Act! Marketing Automation, this will typically be whether or not the contacts have opened the email, or clicked on a link within the email.

In our case, we will make sure to choose **Email Opened** under **Select Condition Type**, and the email this will be based on is **Introducing AMA** under **Select Email**.



Select Condition Type

Email Opened ▼

Select Email

Introducing AMA ▼

Save Cancel

Once you have chosen your options, click **Save**.

You will now see the **Decision Logic** screen.

Decision Logic
Actions ▾

Drip Name: Practice Drip Marketing

Decision Name:

How it works...: Conditions inside the Group are ANDed together. Groups are then ORed together

---

Groups

⏪ ◀ 1 ▶ ⏩
Page: 1 of 1
Go

Group: 1

Group Actions ▾

Conditions ▾ Email Opened: Introducing AMA (Introducing Act! Marketing Automation)

This will enable to you build up as complicated or simple a decision as you would like. For instance, in our example we have stated that we simply want the program to make a decision based on whether the individual contact has opened the email or not. In this instance, what we have on the screen now is enough, we can add in a **Decision name** (which is the name of the step as it appears on our workflow), then go to **Actions** in the top right corner, and choose **Save & Return**.

## OPTIONAL: Decision Logic

It is possible to add further criteria to a decision. For example, you might decide that you want your contacts to both open the email, **AND** click on the link within it before you will automatically create an Opportunity with them.

To add new conditions, click the **Group Actions** button, then choose **Add New Condition**. Doing so will mean that contacts must fulfill **BOTH** conditions.

Group: 1

Group Actions ▾

Conditions ▾ Email Clicked: Introducing AMA (Introducing Act! Marketing Automation)

Conditions ▾ Email Opened: Introducing AMA (Introducing Act! Marketing Automation)

Alternatively, you might decide that you want to automatically create an Opportunity if they

have opened the email **OR** they have clicked on the link within it (for example within Outlook they may have previewed the email without downloading pictures which would not count as opening it, but they could still click on a link). In that case you would need to add another group to your decision logic. To do this, click the **Actions** menu in the top right corner, and choose **Add Group**.

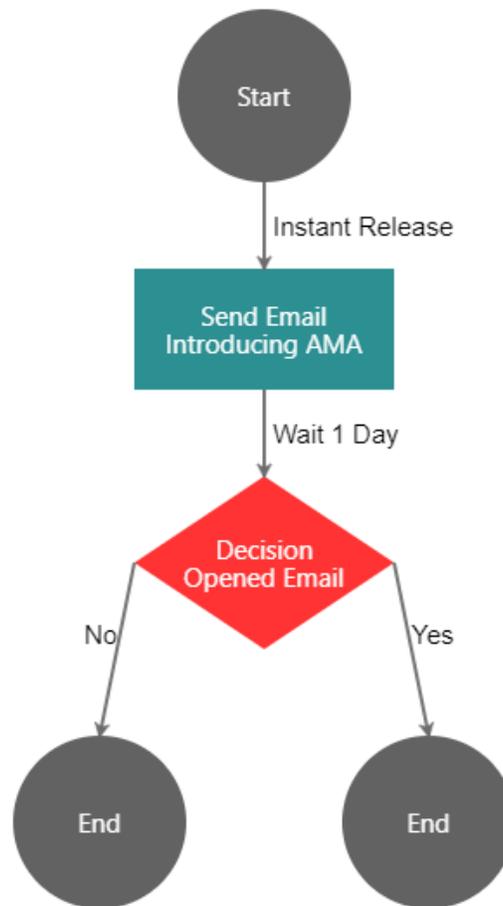
The screenshot displays a workflow editor interface with two distinct groups of conditions. Each group is contained within a light gray rectangular box. The top group, labeled 'Group: 1', features a 'Group Actions' dropdown menu and a 'Conditions' dropdown menu. The selected condition for Group 1 is 'Email Opened: Introducing AMA (Introducing Act! Marketing Automation)'. The bottom group, labeled 'Group: 2', also has a 'Group Actions' dropdown menu and a 'Conditions' dropdown menu. The selected condition for Group 2 is 'Email Clicked: Introducing AMA (Introducing Act! Marketing Automation)'. The interface is clean and uses a light gray color scheme for the group containers.

## Amending Timings and Adding Further Steps



**NOTE:** At this point as your workflow expands, you should be aware of the controls available. **Scrolling the mouse wheel will zoom in or out** on your workflow. If you wish to move your workflow, hold **CTRL** on your keyboard, then **click and drag** to move about the screen.

Now that we have added a decision step, our workflow looks like this:



You will notice that we now have two **End** steps. As previously mentioned, every branch of the workflow must terminate in an End step which have been automatically added for us.



**NOTE:** It may be the case that the branches in your own Decision steps appear in the opposite order on your workflow, meaning your workflow will look different to the screenshots in this guide. Make sure whenever you add new steps that you follow the instructions carefully and add them to the correct branch on your own workflow rather than just trying to copy the look of the screenshots.

Going back to our initial list of actions we want to occur, we mentioned that we only want the program to make a decision once two weeks have passed. At the moment, you can see that the first email will be sent immediately, but then only 1 day later, the decision will be made.

To amend this, click directly on **the arrow next to Wait 1 Day**.

Select Time Element

Time Interval ▼

Select Wait Time

1 Weeks ▼

Do not send on Weekends

Save Cancel

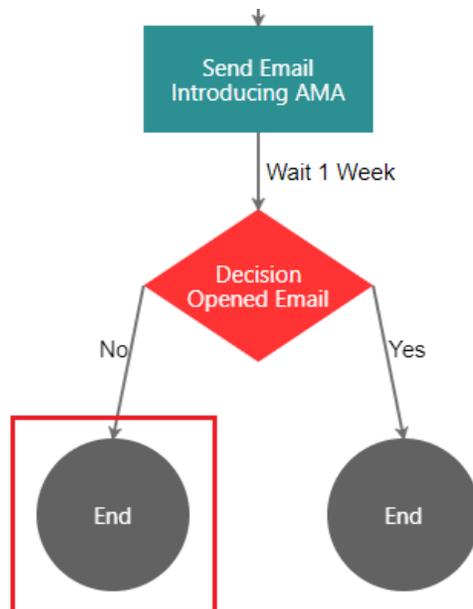
Under **Select Time Element**, you can choose to wait a period of time (**Time Interval**) or else choose the option for **Specific Date/Time**.

Some companies prefer not to send their communications on a weekend. If this option is ticked, the email will be sent on the next working day after the weekend.

In our example, we will choose **1 Weeks**, then click **Save**. The workflow will now be updated with the correct time interval.

We will now look at adding further steps to our workflow. We will begin by looking at the **No** branch of our Decision step.

Again as we originally decided, for any contacts that do not open the original email, we want to re-send that original email with a different subject. To do this, we will click on the **End** step beneath the **No** branch.



Make sure to select **Change Action Type** and **Email** before clicking **Go**.

What would you like to do?

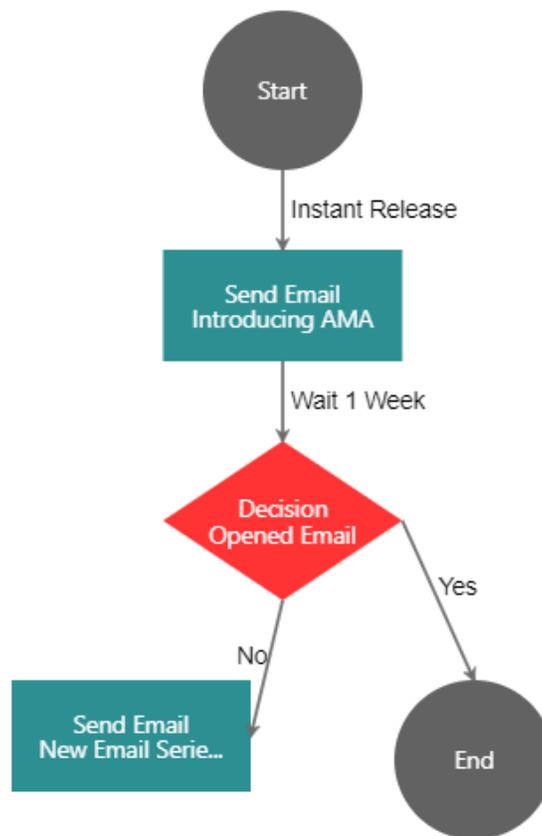
Change Action Type ▼

Select Action

Email ▼

Go Cancel

You will see in the workflow the **End** step has now been replaced with a new email step.



Since we are now without an **End** step on this branch, we will need to add one in, but as we have more steps to add first we will do this later.

For now, we will click on this second email step and choose to **Edit Email Content** as we did earlier.

Again, just as we did previously, we will import our template by going to **Actions** and selecting **Import MY Templates**. After that though, we will go to **Actions**, choose **Properties**, and this time add in a different **Name** and **Subject**.

Name  
2nd Attempt

Subject  
In Case You Missed It, Introducing Act! Marke

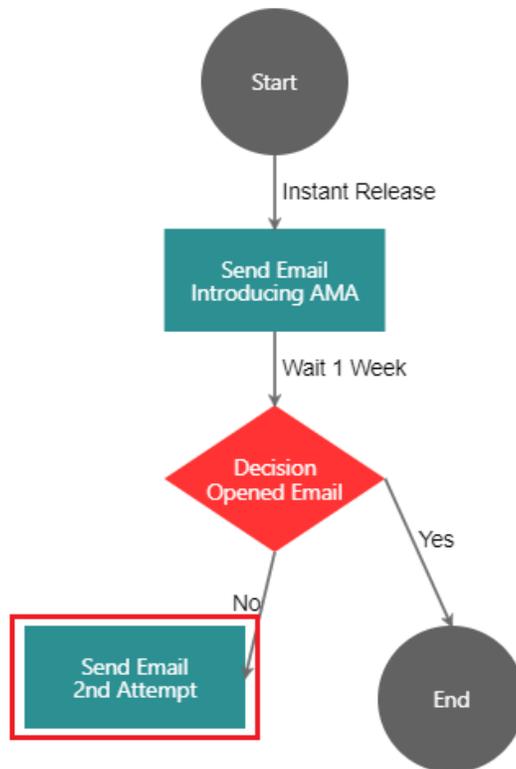
Pre-Header  
*Pre-header text (not required)*

Update Cancel

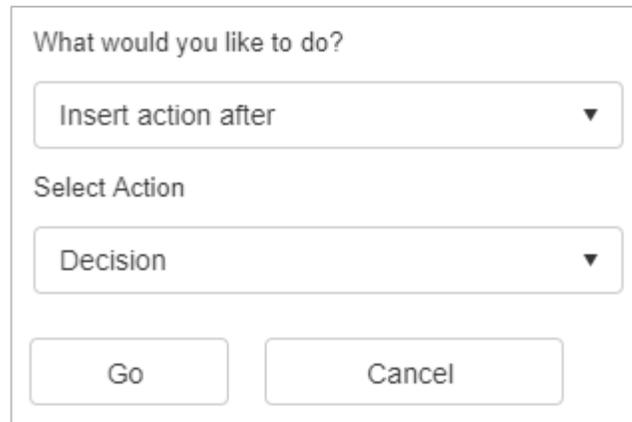
Once these amendments have been made, we can click **Update**, then go to the **Actions** menu once again, and choose to **Return**.

So far in our workflow, we have said that if the contact has not opened the first email within 1 week, AMA will now re-send that email. We now need to add in a Decision step to decide what happens if the contact does or does not open the *second* email.

Click on the **second** email step:



Make sure to select **Insert action after**, and choose **Decision**, then click **Go**.



What would you like to do?

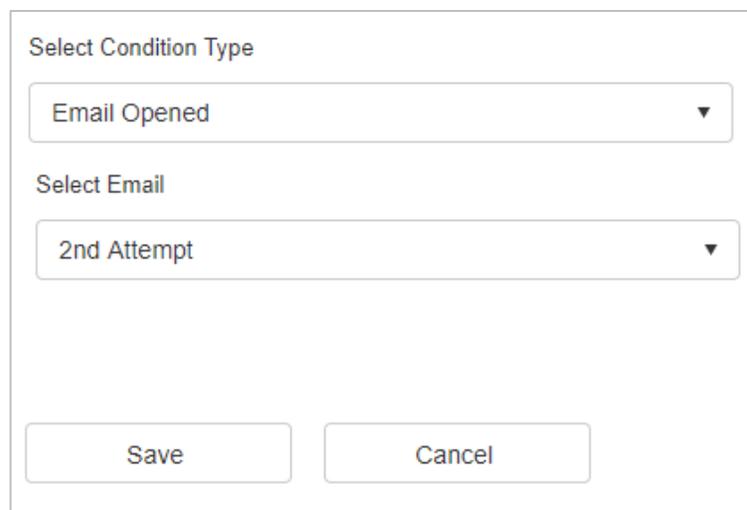
Insert action after ▼

Select Action

Decision ▼

Go Cancel

The decision here is the same as we entered before, has the contact opened the second email or not. So the **Condition Type** is **Email Opened**, and the **Selected Email** is **2<sup>nd</sup> Attempt**.



Select Condition Type

Email Opened ▼

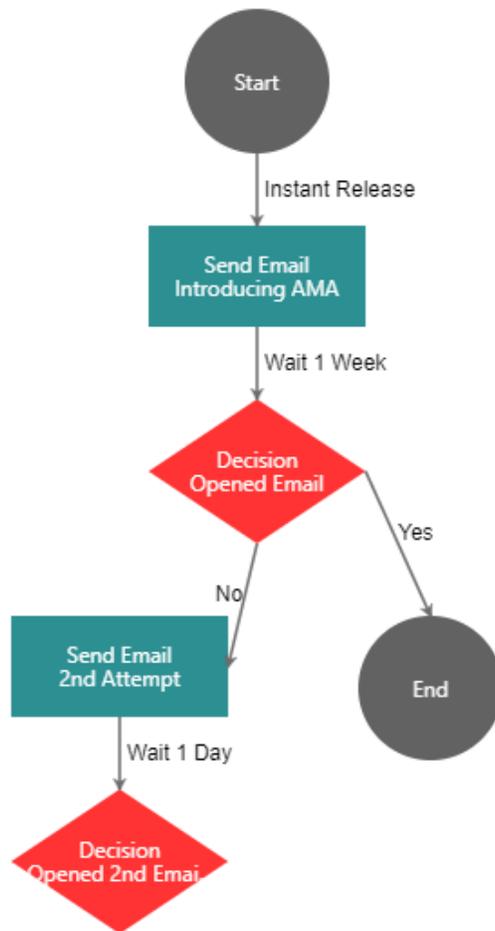
Select Email

2nd Attempt ▼

Save Cancel

Once you click **Save**, you can enter a **Decision Name** (we will call ours **Opened 2<sup>nd</sup> Email**), then click the **Actions** menu and choose **Save & Return**.

Our workflow now looks like this:



According to our list of requirements, if the contact does not open the second email after another week, we want to update a field in Act! and receive an email notification to inform us that the contact never opened the email.

Firstly, we need to change the length of time which currently is set to only **Wait 1 Day**.

To amend this as before, click directly on **the arrow next to Wait 1 Day**.

Select Time Element

Time Interval ▼

Select Wait Time

1 Weeks ▼

Do not send on Weekends

Save Cancel

Under **Select Time Element**, you can choose to wait a period of time (**Time Interval**) or else choose the option for **Specific Date/Time**.

Once completed we can then look at creating the **No** branch. To do this, click on the **Opened 2<sup>nd</sup> Email Decision** step and choose to **Add No Branch**. The **Action** that we want to add is the **Actions** selection. This covers a number of different functions which we can choose between. Click **Go** to proceed.

What would you like to do?

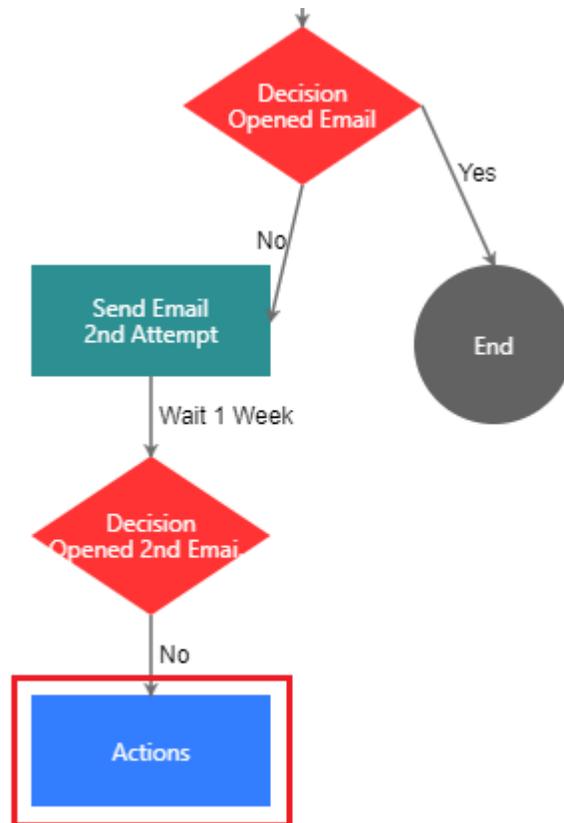
Add No Branch ▼

Select Action

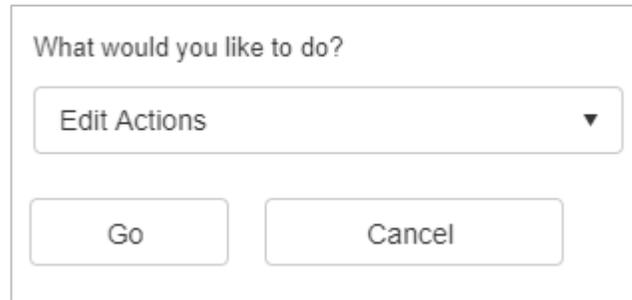
Actions ▼

Go Cancel

We have now added an **Actions** step to our workflow. To specify the action that will occur, click on this step now.



Make sure that **Edit Actions** is selected, then click **Go**.

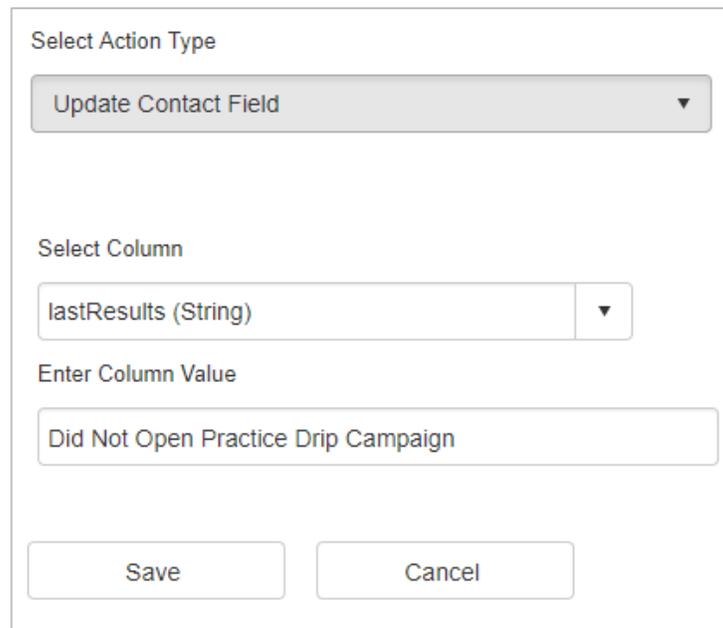


What would you like to do?

Edit Actions ▼

Go Cancel

There are **two** actions that we want to add here. The first is to update a field in Act!. Make sure to select **Update Contact Field**, then choose the field in your Act! database that you want to update, and type in the value you want to add in.



Select Action Type

Update Contact Field ▼

Select Column

lastResults (String) ▼

Enter Column Value

Did Not Open Practice Drip Campaign

Save Cancel

In our example, we are going to update the **Last Results** field as this is typically used to record the most recent action against a contact record, and we are going to enter a value of **Did Not Open Practice Drip Campaign**. Once all fields are completed, click **Save**.

Now that the first action has been added, we also need to add the Notification step. To do this, click on the **Actions** menu, and select **Add Action**.

Select Action Type

Notification

Notifications

sales@swiftpage.com x

Save Cancel

The **Action Type** needs to be set to **Notification**. In the **Notifications** field, enter the email addresses you would like to be notified. Hit **Return** after each email address to allow you to add multiple addresses. Click **Save** once completed.

Now that both actions have been added, enter an **Action Name** (we will add **Update and Notification** here), then click the **Actions** menu and choose **Save & Return**.

Drip Actions Actions ▾

Drip Name Practice Drip Marketing

Action Name

---

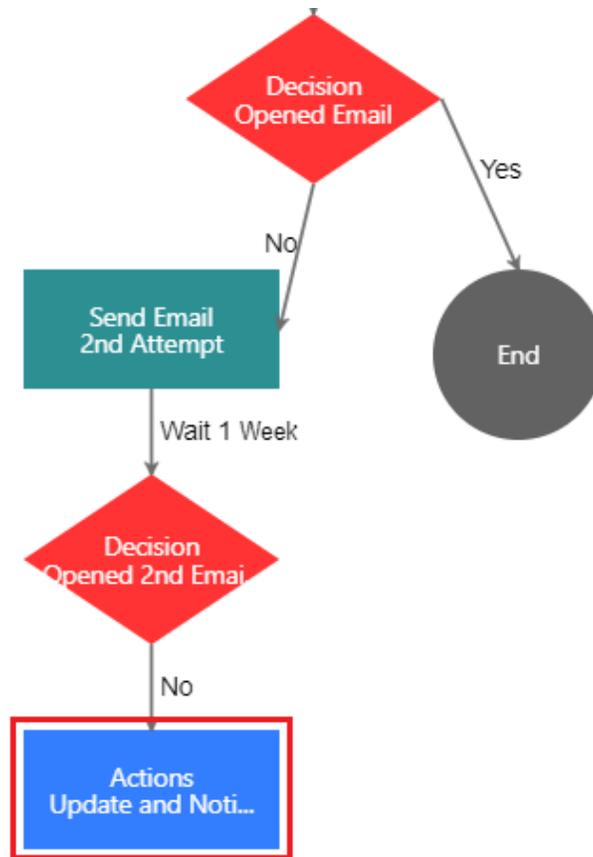
Actions

Page: 1 of 1 Go

Edit Delete Update Field: lastResults (String) Equals Contact did not open Practice Campaign

Edit Delete Send Notification to: [REDACTED]

We have now completed the **No** branch of our workflow, all that is needed now is to add the **End** step. To do so, click on the **Actions** step once again.

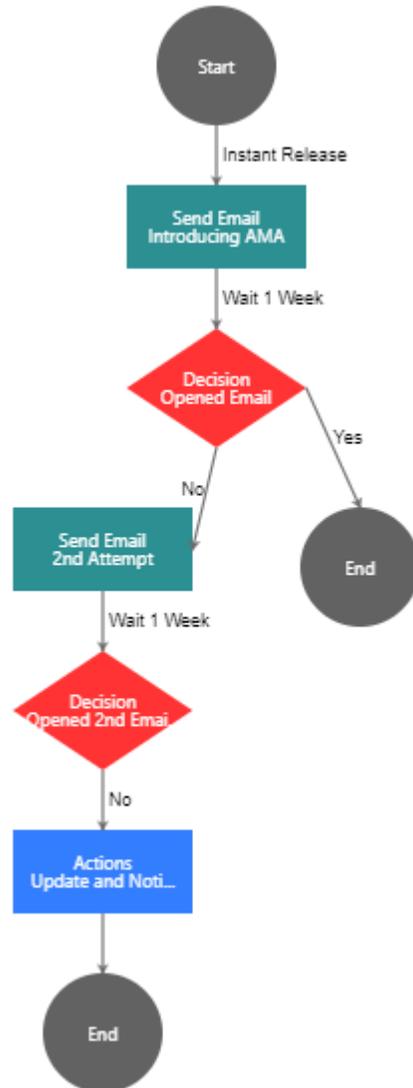


Make sure to choose **Insert action after**, and choose the **End** action before clicking **Go**.

What would you like to do?

Select Action

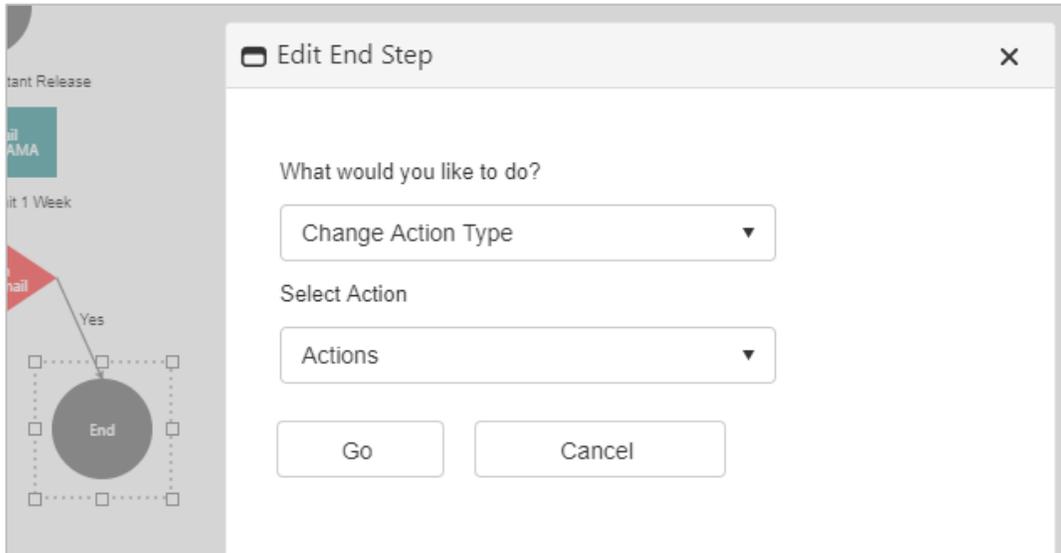
We have now successfully completed the branch of our workflow if a contact does not open the first email, and then does not open the second email. Our workflow now looks like this:



We now need to take a look at the **Yes** branches in our workflow. We will begin this by going back to the **first Decision** step, the **Opened Email** step.

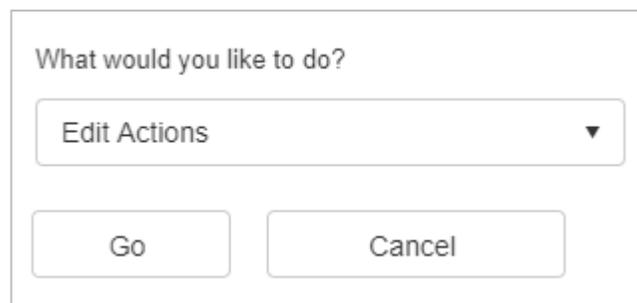
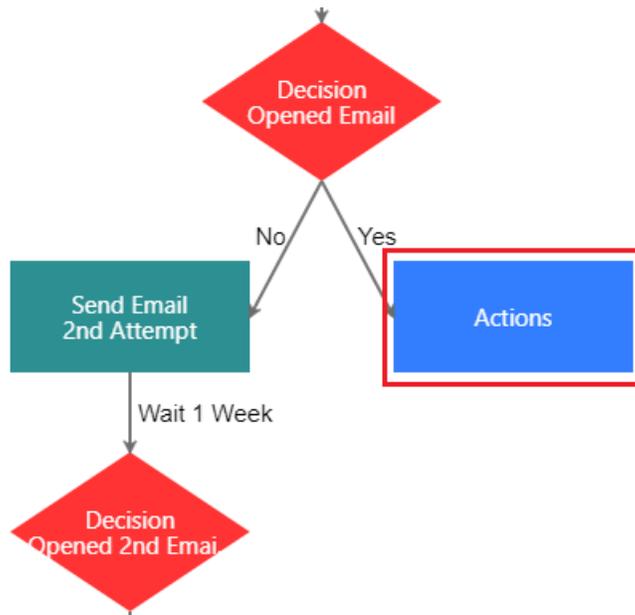
At the moment, the **Yes** branch goes straight to the **End** step. According to our plan, if the contact opens the email, we want to update a field in Act!, and automatically create an Opportunity for them as well.

To do so, click on the **End** step, and choose to **Change Action Type** to **Actions**.

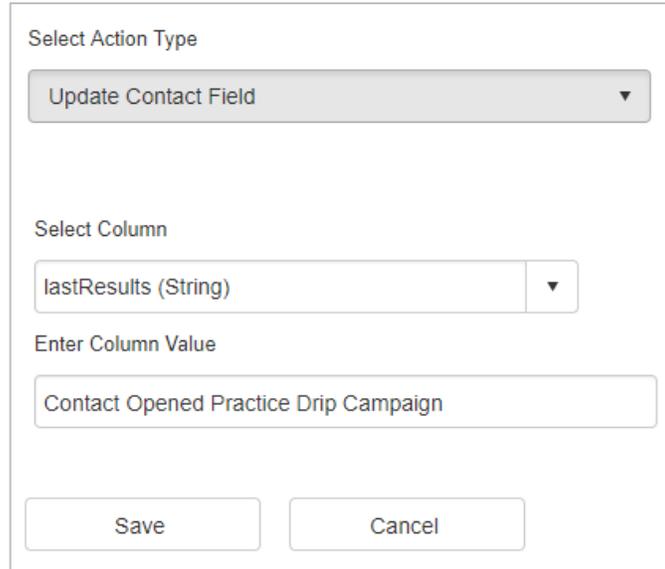


Click **Go** to proceed.

As we saw previously, you now need to click on the **Actions** step, and choose to **Edit Actions**.



The first action we will add is to **Update Contact Field**. We will choose the same fields as before (**Last Results** in our example), but the value we enter needs to be different, this needs to confirm that the contact has opened the email.

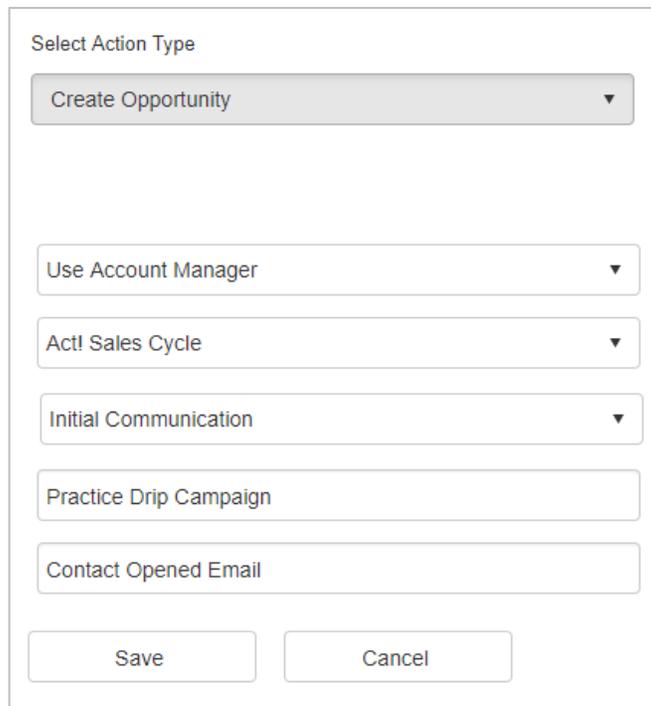


The screenshot shows a configuration dialog for an action. It has a title 'Select Action Type' and a dropdown menu with 'Update Contact Field' selected. Below that is a 'Select Column' dropdown menu with 'lastResults (String)' selected. Underneath is an 'Enter Column Value' text input field containing the text 'Contact Opened Practice Drip Campaign'. At the bottom are two buttons: 'Save' and 'Cancel'.

Click **Save** once finished.

Because the contact has opened the email, the other action that we want to add is to automatically create an Opportunity for the contact as well. With my sales team monitoring their Opportunities queues, they will be able to see these new Opportunities enter their queues and action them appropriately.

To add this Opportunity, go to the **Actions** menu, and click **Add Action**.



The screenshot shows a configuration dialog for creating an opportunity. It has a title 'Select Action Type' and a dropdown menu with 'Create Opportunity' selected. Below that are four dropdown menus: 'Use Account Manager', 'Act! Sales Cycle', and 'Initial Communication'. Underneath are two text input fields: 'Practice Drip Campaign' and 'Contact Opened Email'. At the bottom are two buttons: 'Save' and 'Cancel'.

Make sure to choose **Create Opportunity** as the **Action Type**.



**NOTE:** If you would like more information on what an Opportunity is or how to work with them in Act!, please see the following video library: <http://training-act.com/act/act-lib-prem/?courseId=opportunities&>.

From here there are various fields to complete for the automatically generated Opportunity. The first field allows you to specify which user will be the **record manager** for the newly created Opportunity. The value you chose here will depend how you manage your Opportunities in Act!. For example, if you want the record manager of the individual contact to also manage the Opportunity, choose a value of **Use Account Manager**. If however there is a specific individual in your company that manages your Opportunities (this could of course be different for each Drip marketing campaign that you create), choose that specific user from the dropdown list.

The second field allows you to choose the **Sales Process** that you want to apply to the automatically created Opportunity. This is something you should make sure you have set up in Act! before you get to this step of your campaign (you may even want to create a process specifically for this AMA campaign). Once you have chosen this, you will then be able to pick the specific **Stage** within the Sales Process.

You then need to specify a **Name** for the Opportunity that will be created. This means that many Opportunities will be created with the same name, but that is useful as it allows you to easily search for all of the Opportunities created as a result of this campaign. Because of that it is important that you make sure the name here relates to the specific campaign.

Finally you can add a **Reason** here as well. The Reason field is specific to Opportunities and allows you to add some specifics about why this Opportunity has been created. This would allow you to potentially create several different Opportunity steps in your workflow and enter a different reason each time.

Once you have completed the form, click **Save**.

Now that both actions have been added, enter an **Action Name** (in our example we have added **Update and Opportunity**), then click on the **Actions** menu and choose **Save & Return**.

Drip Actions
Actions ▾

Drip Name: Practice Drip Marketing

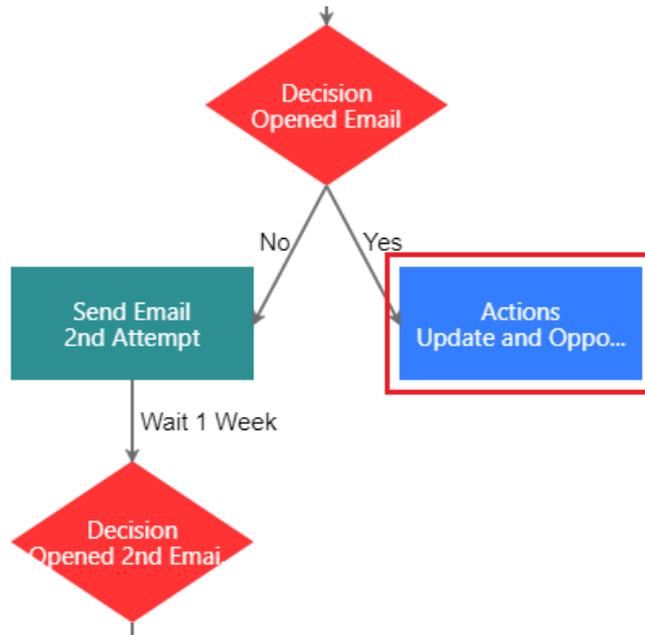
Action Name:

Actions

◀
1
▶
Page: 1 of 1
Go

Edit	Delete	Update Field: lastResults (String) Equals Contact Opened Practice Drip Campaign
Edit	Delete	Add Opportunity (Notes) = 'Contact Opened Email'

We have nearly completed the first **Yes** branch in our workflow. The last step to add is to make sure there is an **End** step. As before, click on the **Action** step, choose to **Insert action after**, and make sure that **End** is selected.



What would you like to do?

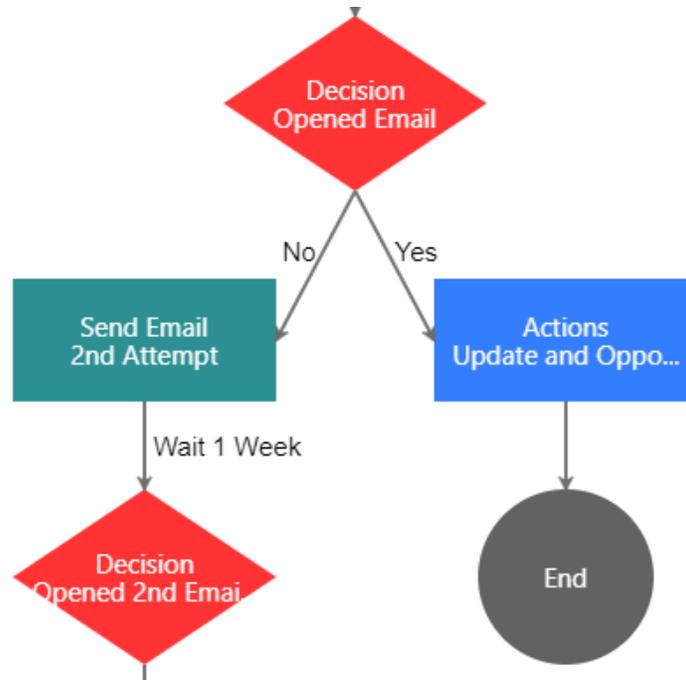
Insert action after ▼

Select Action

End ▼

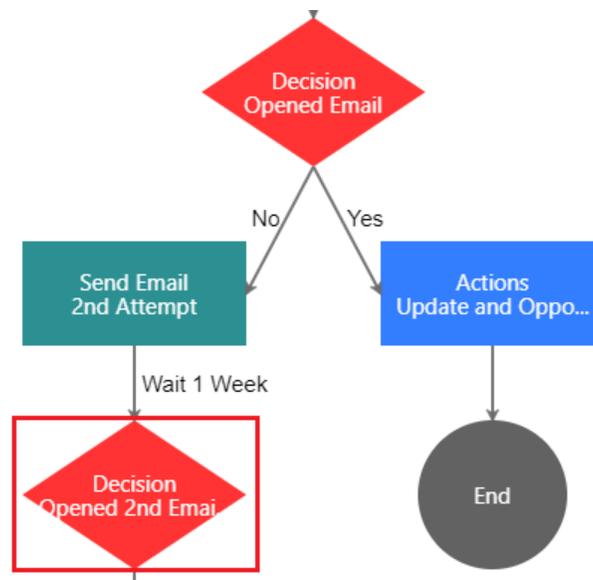
Go Cancel

Once completed, the branch will look like this:



There is now only one branch remaining to complete in our workflow. This is the **Yes** branch from our **second Decision** step, the step entitled **Opened 2<sup>nd</sup> Email**.

At the moment, there is only a **No** branch from this Decision step. To add the **Yes** branch, click on the **Opened 2<sup>nd</sup> Email** step.



Make sure to choose **Add Yes Branch**, and **Actions** before you click **Go**.

What would you like to do?

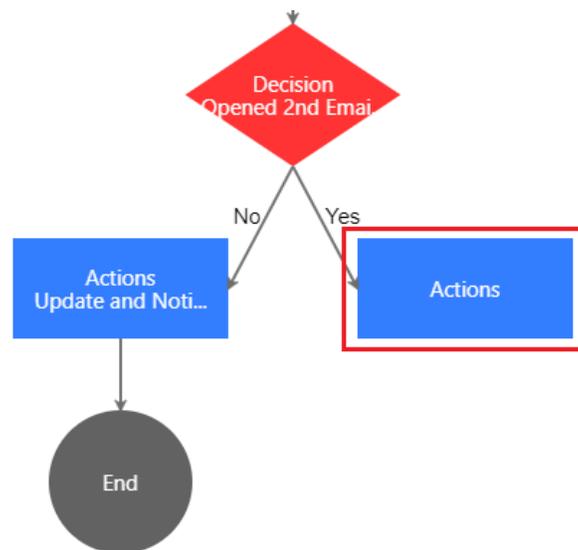
Add Yes Branch ▼

Select Action

Actions ▼

Go Cancel

Your workflow will now look like this:

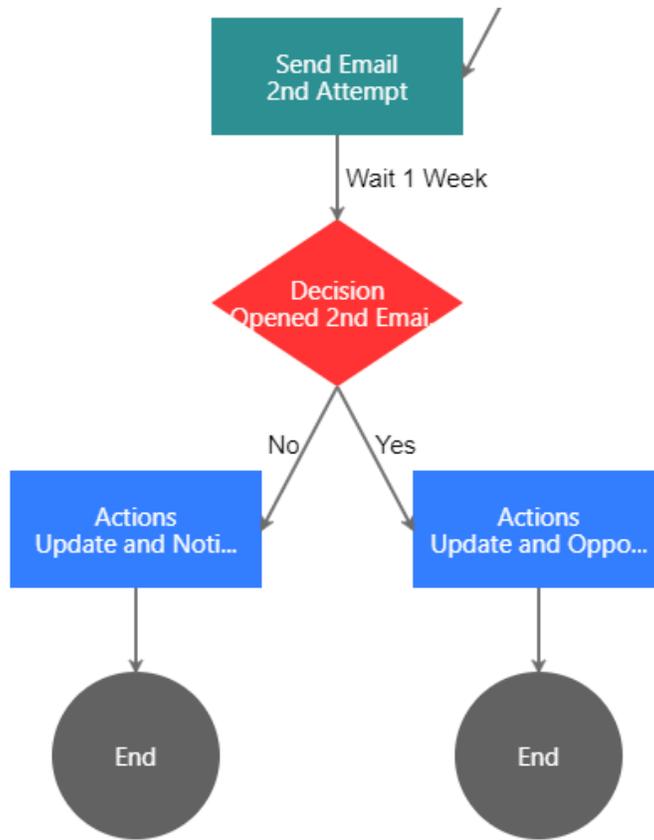


Click on the **Actions** step highlighted in the screenshot above. You will now need to edit this Actions step in exactly the same way as the previous yes branch. So you will need to:

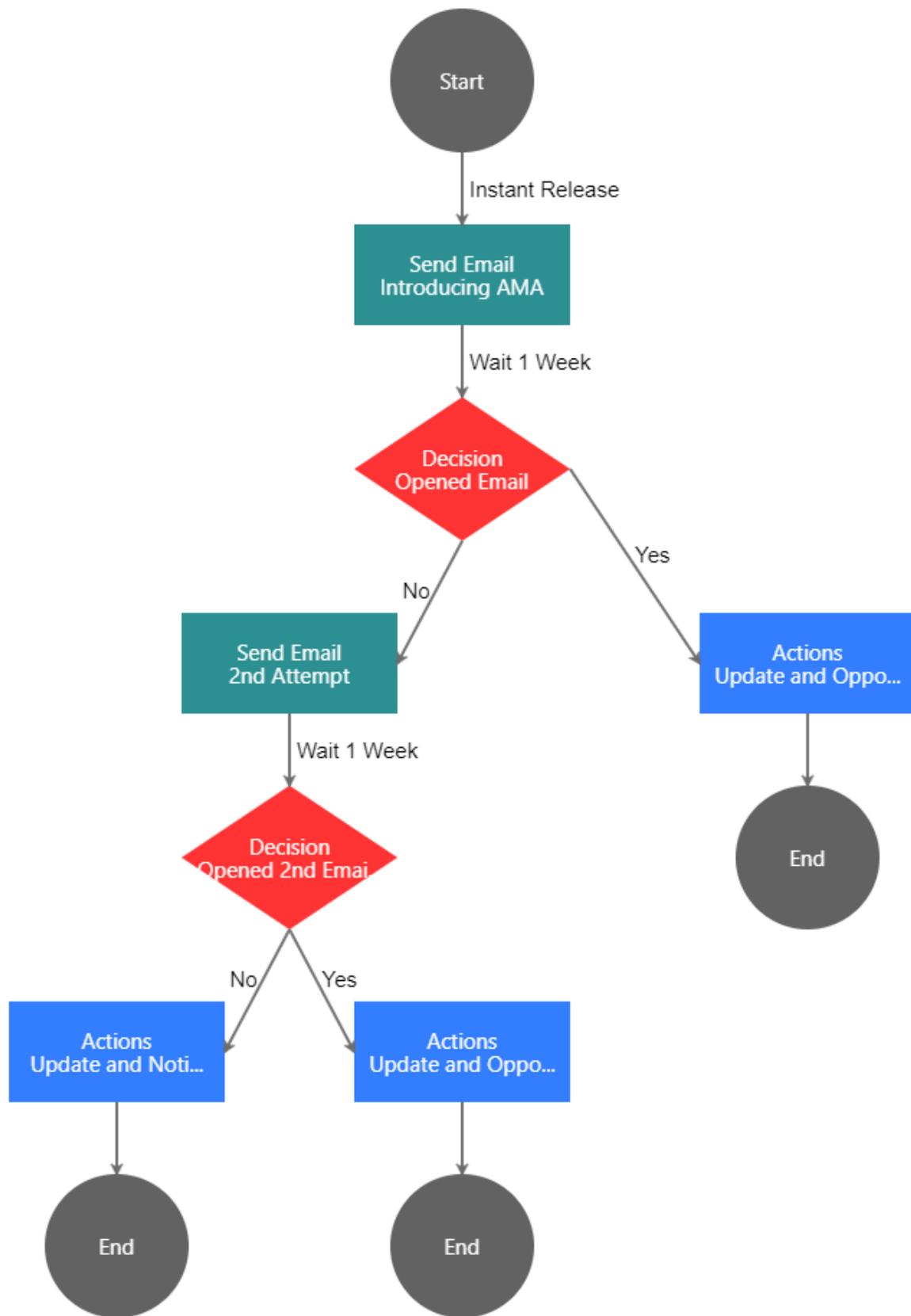
- Add an action to update the **Last Results** field.
- **Create an Opportunity.**

Follow the steps we have just covered in this guide to add those Actions to this step. Once completed you will also need to include an **End** step as well.

If you have completed these steps correctly, your workflow branch should now look like this:



With this branch now ended correctly, our workflow is now complete. The completed workflow looks like this:



With our workflow now complete, we are ready to activate our campaign.

## OPTIONAL: Advanced Workflow Design - Adding Another Decision Step

What we have seen so far is how to create a workflow based around one decision, namely whether or not the contact opens the email they receive. We are going to add a further level of complexity by adding another bullet point to our list of requirements:

- If the contact clicks on the link within the email, we want to automatically schedule a call with that contact.

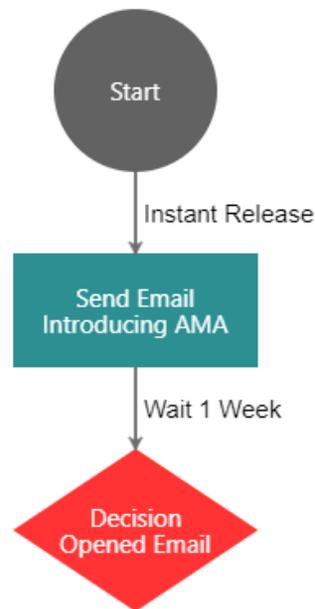
Now we could make this a really simple addition to our workflow. We could simply amend our two decision steps to include the additional criteria for clicking the link. This would work very well if we wanted a contact to proceed down the yes branch if they both opened the email and clicked on the link within it. However, our requirement is slightly more complicated than that. Instead of creating an Opportunity, we want to schedule a call if they have clicked on the link, *regardless of whether they have opened the email or not*. For example, if they are using Outlook without downloading pictures, they may have viewed the email in the preview pane (which would not count as an open), and then clicked the link on the email.

Because of this, we are going to look at creating a more complex campaign that requires multiple decision steps and therefore multiple branches. We will amend the previous template we have been working with so far in our example.



**NOTE:** In most cases we would recommend creating a new template again from scratch. This is because Decision steps can only be deleted from a workflow if you have already deleted **EVERY** step that follows the Decision. Therefore if you try to add a new Decision step earlier in your workflow, you may find that your workflow now follows the incorrect branch, and the only solution would be to delete every step that follows the Decision.

The first thing we will do is **delete every step that follows the first decision in our workflow**. If you are following along yourself, you may prefer to begin a new Drip marketing campaign instead. Once completed, our workflow looks like this:



There are four possible outcomes that we want to look at here initially:

- Opened Email, Clicked Link.
- Opened Email, Did Not Click Link
- Did Not Open Email, Clicked Link
- Did Not Open Email, Did Not Click Link.

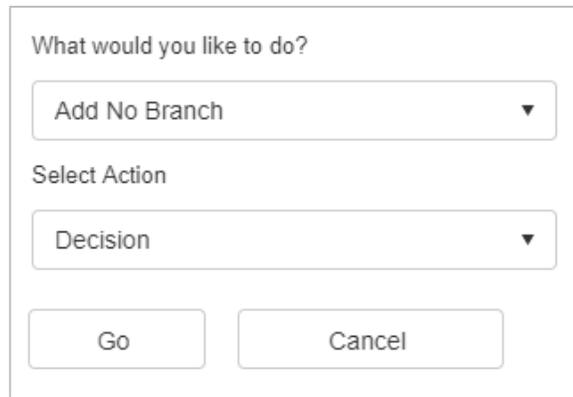
We need to decide exactly what we want to happen with each of these outcomes. Deciding this beforehand is critical if we want to make sure we create our workflows correctly. For example, we may decide that if a contact does not open the email, but does click on the link, we will only schedule a call with him, or we might decide to schedule both a call and create an Opportunity. Even though we initially decided to create an Opportunity only if the contact opened the email, the fact that they have clicked on the link would suggest they must have at least read the email even if they did not technically open it.

In our example, we will construct the following outcomes:

- Create an Opportunity, schedule a call and update a field.
- Create an Opportunity and update a field.
- Create an Opportunity, schedule a call and update a field.
- Send out a second email as per the previous campaign.

To accomplish this, our current Decision of whether or not the contact opened the email needs to have both Yes and No branches that each go straight to another Decision. That second Decision will be whether or not they clicked the link in the email.

So then, click on the **Decision** step, and choose to **Add No Branch**. Make sure that the selected Action is a **Decision**.

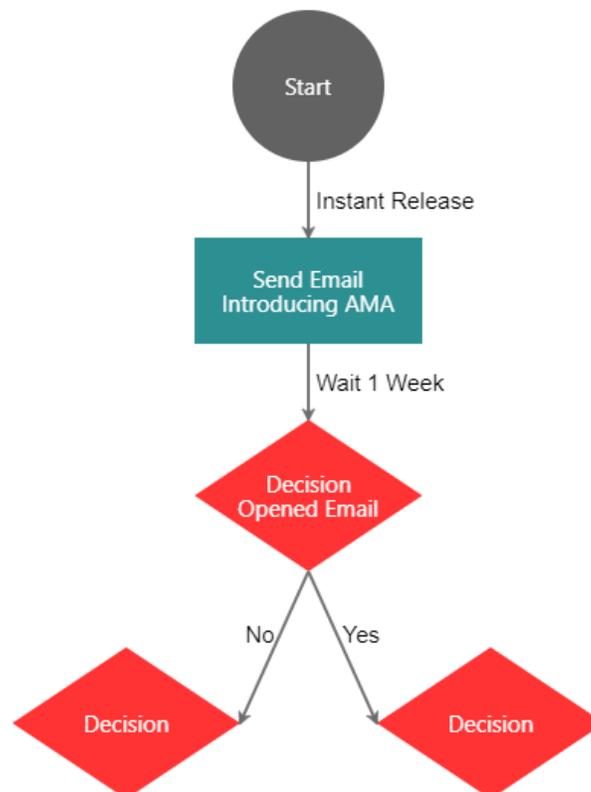


The screenshot shows a configuration window for a decision step. It contains the following elements:

- A question: "What would you like to do?"
- A dropdown menu with "Add No Branch" selected.
- A label: "Select Action"
- A dropdown menu with "Decision" selected.
- Two buttons: "Go" and "Cancel".

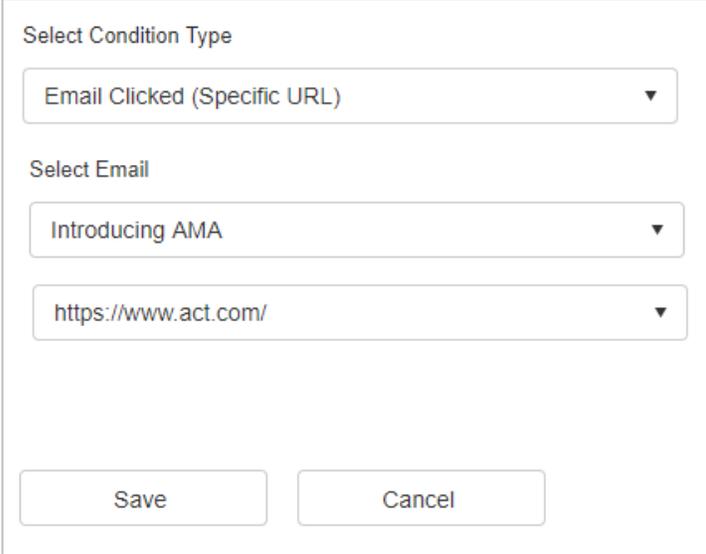
Once this has been added, **click on the same first Decision step**, but this time choose to **Add yes Branch**, once again making sure you select a **Decision**.

Our workflow now looks like this:



We now need to specify the Decision steps we have just added to our template. Both will be the same criteria, that is, did the contact click on the link in the email. To do this, click on each Decision in turn, and choose to **Edit Logic**.

The condition for the Decision steps needs to be whether they clicked on a specific URL.



Select Condition Type

Email Clicked (Specific URL) ▼

Select Email

Introducing AMA ▼

https://www.act.com/ ▼

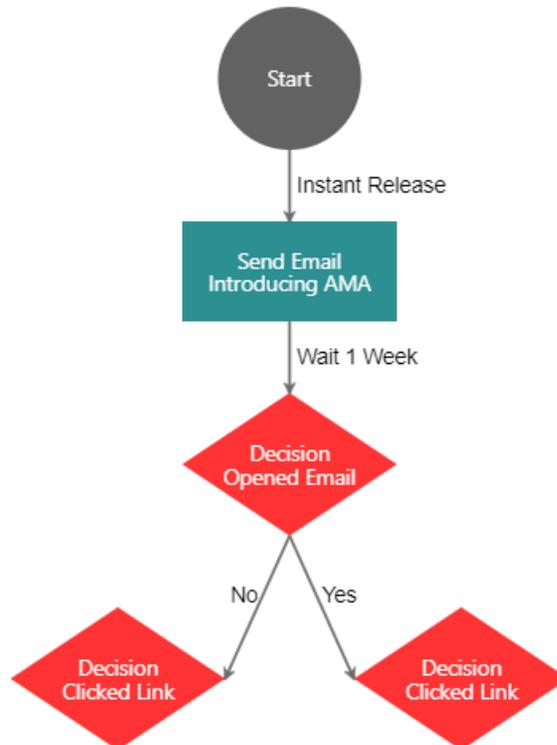
Save Cancel

We have made sure to select a **Condition Type** of **Email Clicked (Specific URL)**. We have entered the correct email (**Introducing AMA**), and finally we need to select the correct link from the dropdown menu. This means that if you wanted to create especially complex campaigns, you could create Decision trees based on multiple different links in your template.

In our particular case, we created a button on our template that advised our contacts to click it if they wanted to receive a call. It is this link that we need to select now.

Once this has been chosen, we can click **Save**. We then need to add a **Decision Name** (in our example we have used **Clicked Link**), then we can go to the **Actions** menu and choose **Save & Return**.

Once you have edited the logic of both your Decisions and added a name, your workflow will look like this:



We will next go to the **Clicked Link** Decision under the **No** branch. Click on this and choose to **Add No Branch**. Because this branch will be for contacts who have not opened the email and have not clicked the link, in this scenario we want to give them a second attempt. So when adding the No branch, the **Action** we need to select is **Email**.

What would you like to do?

Add No Branch ▼

Select Action

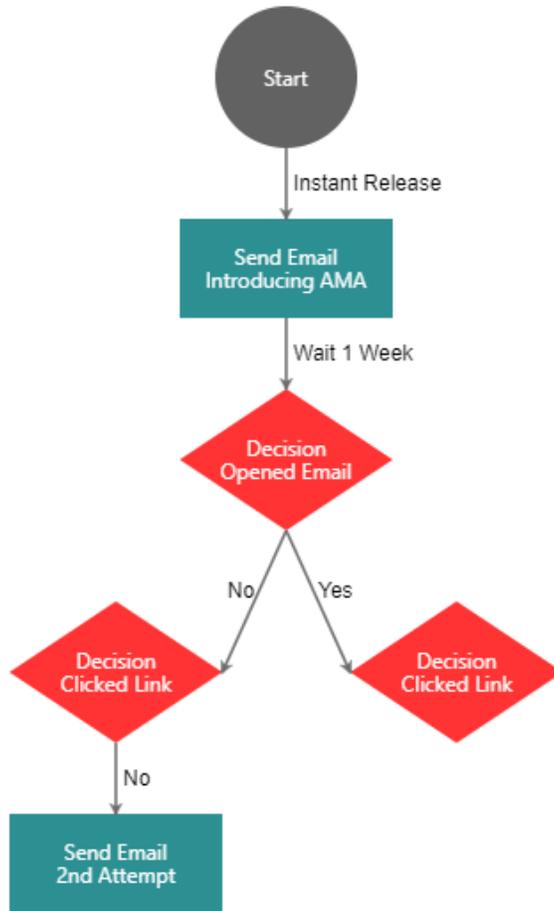
Email ▼

Go Cancel

Make sure to click on this **Email** step, and choose **Edit Email Content**.

As we saw in our earlier campaign, we want to send the same email but with an amended subject line. By following the steps previously covered in the guide, you will need to make sure that you import your template, then go to the **Actions** menu, choose **Properties**, and enter a new subject line.

Once you have set up this second email, your workflow should now look like this:



We will now add the **Yes** branch to the **Clicked Link Decision**. So this will be the branch for any contacts that did not open the email, but who did click on the link.

To do this, click on the **Decision** step, choose to **Add Yes Branch**, and make sure that **Actions** is selected.

What would you like to do?

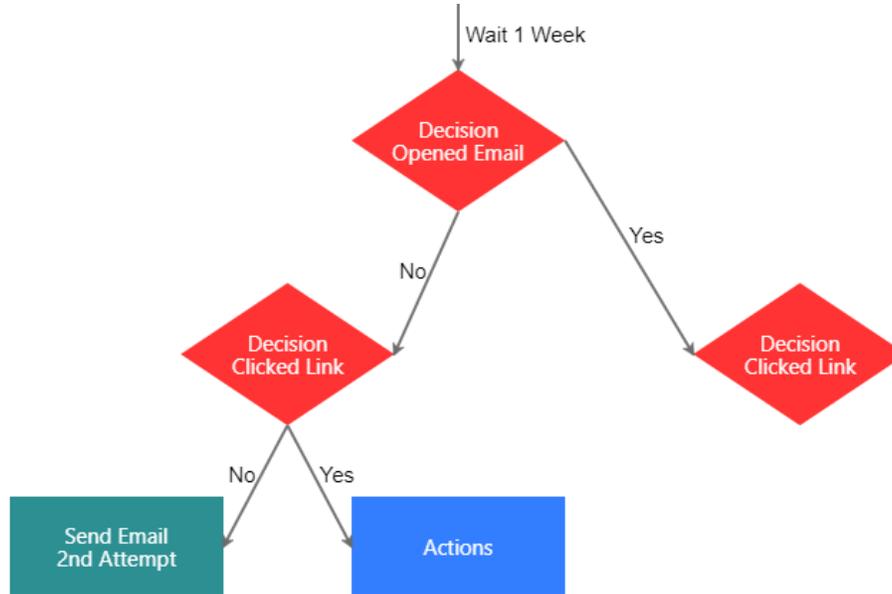
Add Yes Branch ▼

Select Action

Actions ▼

Go Cancel

Your workflow will now look like this:



For contacts that did not open the email, but did click the link, we decided to **create an Opportunity, schedule a call and update a field**. Click the **Actions** step, then choose **Edit Actions**.

The first **Action Type** will be **Create Opportunity**. Fill in the fields as seen previously in the training guide.

Once completed, click the **Actions** menu and choose **Add Action**. Choose **Update Contact Field** and make sure to update the **Last Results** field as seen previously.

Finally, once again go to the **Actions** menu and choose to **Add Action**. This time you will need to select **Create Activity**.

Select Action Type

Create Activity ▼

Use Account Manager ▼

Call ▼

Discuss Interest in AMA

Clicked on the "contact me" link in the Practice Campaign

Save

Cancel

Similarly to creating an Opportunity, there are several fields that need to be completed. Creating a call means that once a contact follows this particular branch of your campaign, a call will automatically be scheduled with them in your Act! database, again a huge time saver rather than manually setting up the activities for each contact. All the users of your database need to do is to check their calendar whenever they log into Act! and wait for these activities to appear.

You will need to choose which of your users will actually make the phone call. Again you can choose for this to be the record manager of the individual contact, or if you have a specific member of staff that you would like to perform the call, you can select them instead.

Make sure to choose **Call** as the activity type, then complete the next two fields to provide more details of the call. These should be used to indicate to the user exactly why this call has been scheduled, therefore again it is an excellent idea to reference the specific Drip Marketing campaign that has resulted in the call being created.

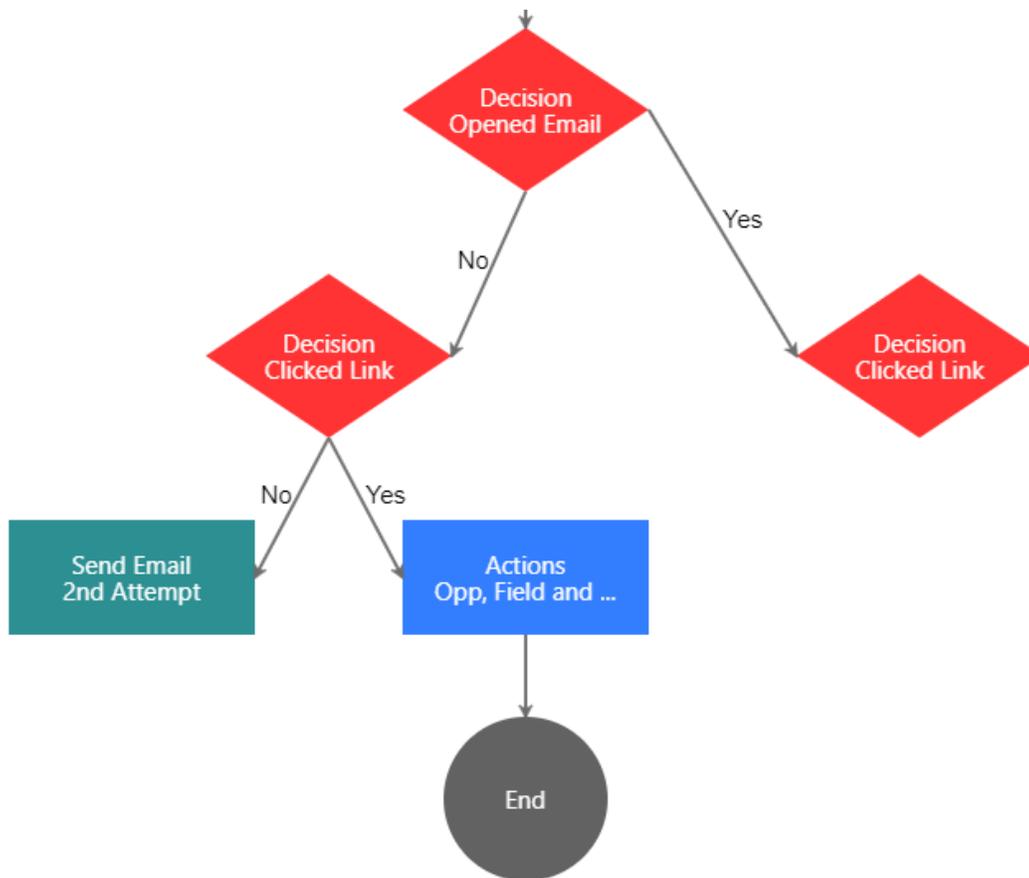
Once the details have been completed, click **Save**. You should now have three actions set up.

The screenshot displays the 'Drip Actions' configuration page. At the top right, there is an 'Actions' dropdown menu. The 'Drip Name' field is set to 'Practice Drip Marketing'. The 'Action Name' field contains 'Opp, Field and Call'. Below this, the 'Actions' section shows a table with three rows of actions. Each row includes 'Edit' and 'Delete' buttons and a description of the action.

Actions	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Add Opportunity (Notes) = 'Contact Clicked Link'
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Update Field: lastResults (String) Equals Contact Clicked Link
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Add Activity (Notes) = 'Clicked on the "contact me" link in the Practice Campaign'

Enter an **Action Name** (we have used **Opp, Field and Call** in our example), then click **Actions** and choose **Save & Return**.

Now this branch has been completed, we can click the **Actions** step again and choose to add the **End** step afterwards. Once done, your workflow will now look like this:



We will now move on to adding Yes and No branches to our **second Clicked Link Decision** (the Decision step to the right on the screenshot above).

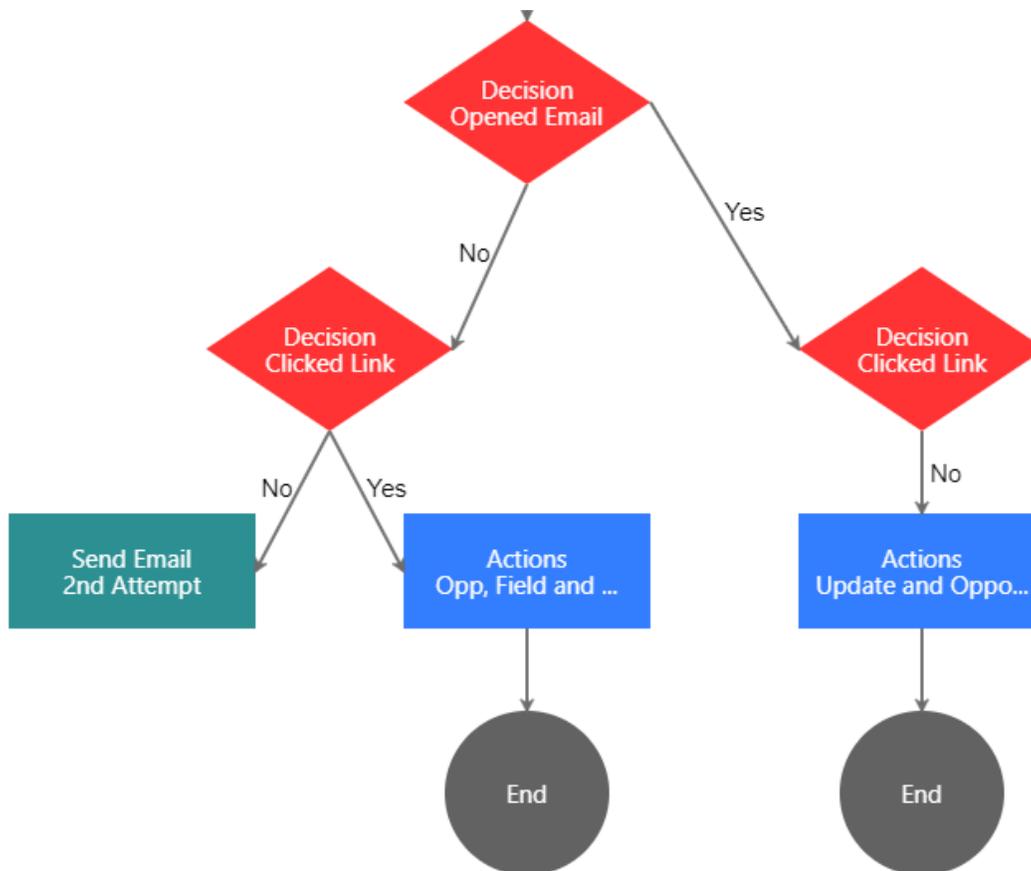
For this decision, we are looking at contacts that opened the email, but did not click the link, and contacts who opened the email and then did click the link as well. We have decided that for the first group, we will create an Opportunity and update a field, whereas the second group will get an Opportunity, an updated field, and a call scheduled with them as well.

Firstly we will click the **Decision** stage, and choose to **Add No Branch**. Make sure **Actions** is selected.

Following the instructions you have already seen, make sure to set up an Action that **updates the Last Results field**, and also **creates an Opportunity** for the contact.

make sure once you have done this to add the **End** step to complete this part of your workflow.

Once completed, your workflow will now look like this:



We will now add the **Yes** branch to this Decision step as well. Click on the Decision step, choose to **Add Yes Branch** and make sure to choose **Actions**.

Following the instructions you have already seen, make sure to set up an Action that **updates the Last Results field, creates an Opportunity**, and also **schedules a call** for the contact.

Once again, once the Actions step has been set up, make sure to add the **End** step afterwards.

Once completed, your workflow will now look like this:



We have now completed every branch of our workflow, except for the actions that will follow the **2<sup>nd</sup> Attempt Email** step.

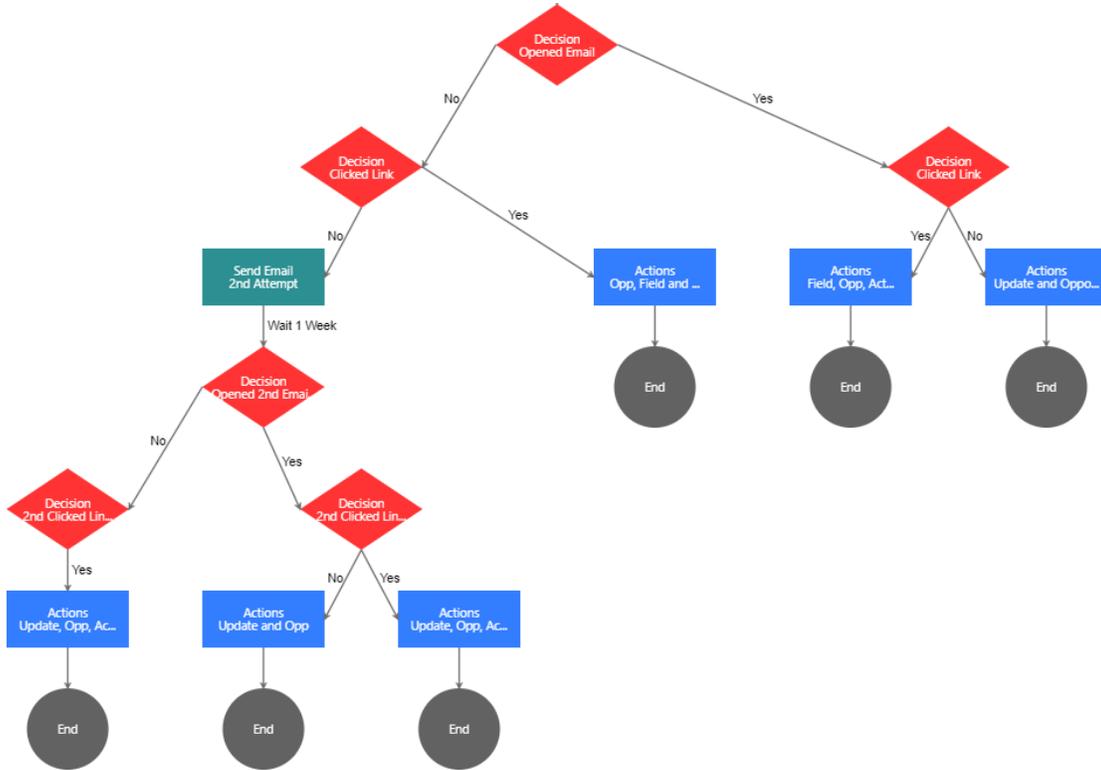
Because we want to follow the same pattern that we have established previously, we will want the program to wait 1 week, then make a decision as to whether the contacts have now opened the email or not, and also whether they clicked the link or not.

This means in terms of how our workflow will look, we will need to **repeat everything we have just created below the first email step**. So the 2<sup>nd</sup> Attempt needs to lead to a Decision on whether the contacts have opened the email, which in turn leads to two Decision steps as to whether they have clicked on the link or not. The only exception will be if a contact did not open the email or click the link on the second attempt.



**NOTE:** Don't forget to change the time interval to **1 Week**.

Repeat all the instructions we have just went through until your workflow looks like this:



The final branch that we need to add is if a contact has not opened the second email, nor have they clicked the link either. In the screenshot above, this is the Decision step to the far left. For these contacts, we want to update the Last Results field to say that they never opened the email, and we want to send a notification to ourselves letting us know about these contacts.

Click the **Decision** step, and choose **Add No Branch**. Make sure to choose **Actions** before clicking **Go**.

Set up an **Update Field** action, and a **Notification** action:

Drip Actions Actions ▾

Drip Name: Practice Drip Marketing

Action Name: Update and Notification

---

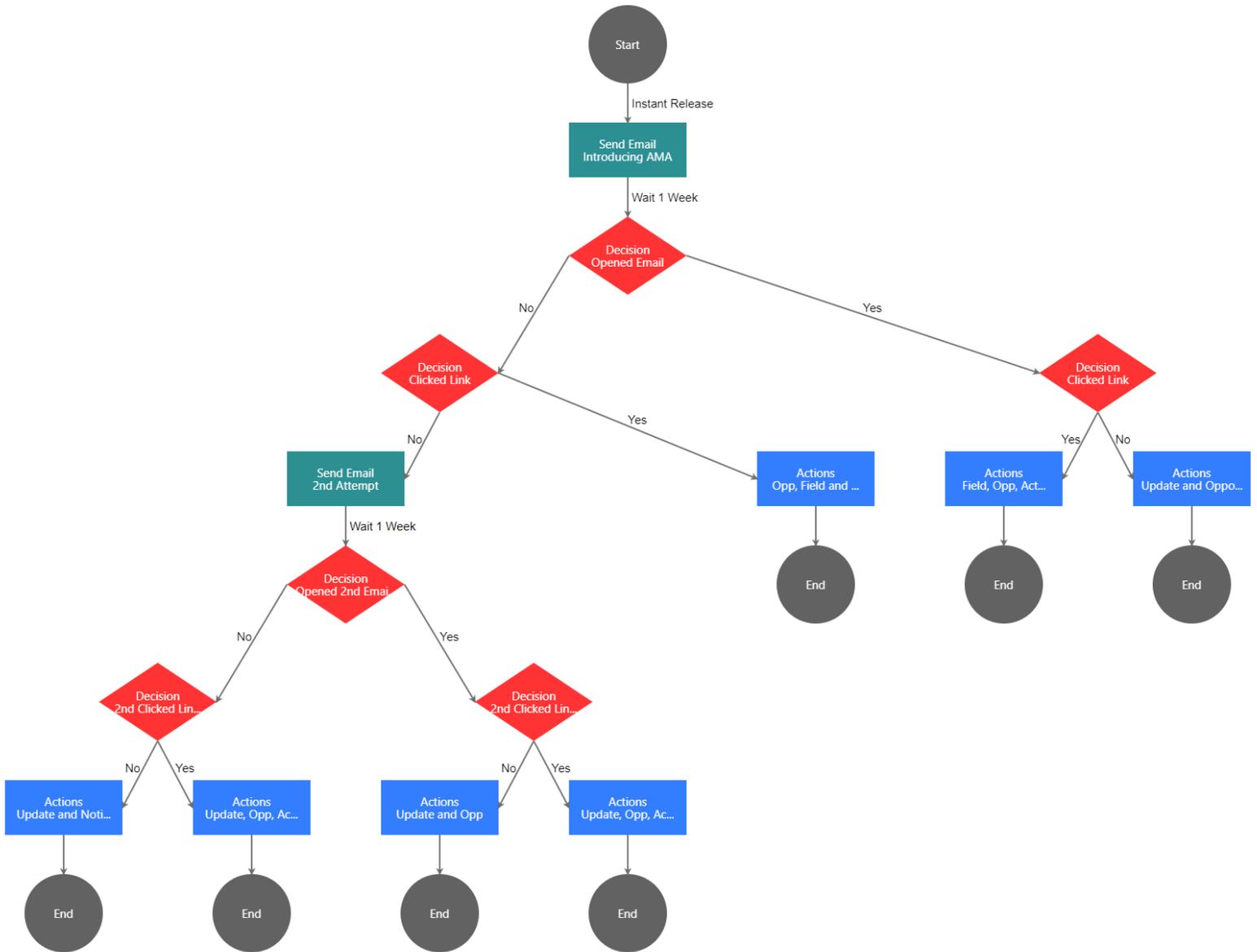
Actions

Page: 1 of 1 Go

Edit Delete Update Field: lastResults (String) Equals Contact did not open Practice Campaign

Edit Delete Send Notification to: ██████████

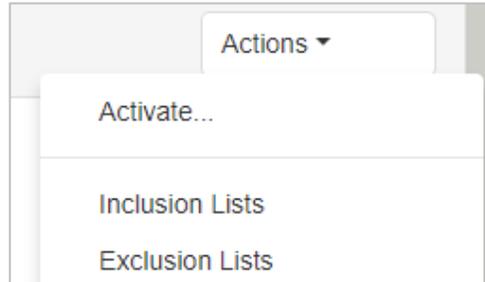
With that final step completed, you can add the **End** step to this last branch, and with that your workflow is now completed.



# Inclusion/Exclusion Lists and Campaign List Sync

Now that your workflow has been completed, you are almost ready to activate the campaign. Before you do so though, there are a few settings you may wish to look at first.

It is possible to choose to include or exclude additional groups of contacts if you want to. From the workflow view, click the **Actions** menu, then choose either **Inclusion Lists** or **Exclusion Lists**.



The principle is the same for both options. All you need to do is choose additional Act! Groups to either include in your campaign or exclude as you wish.

 A screenshot of a configuration panel titled "Inclusion Lists". It features a "Groups" dropdown menu, a "Select a List" dropdown menu, and an "Add Include List" button.

This is very helpful if you want to either include additional contacts in your campaign, or else make sure that a certain Group is omitted.

There is also a very useful setting called **Campaign List Sync**.



**NOTE:** Automatic campaign list sync is available for Growth Suite customers on the **Premier tier** and above.

You can access this feature from within the workflow design by clicking your **Actions** menu and choosing **Campaign List Sync**.

Campaign List Sync
Actions ▾

Campaign List Sync will automatically check your include lists against the current members of this campaign.

At each time interval, it will retrieve all current members in the include list(s) and compare these members to those currently in the campaign. If there are any new members in the include list, they will be added to the start of this campaign. Similarly, if members were removed from your list(s), then they will also be removed from the campaign. On each sync, the exclusion lists, unsubscribe list, and suppression lists will be automatically checked.

*Warning: You should not use a specific date and time when using this feature.*

Campaign List Sync Off

▾

Daily

▾

8 AM

▾

(GMT -5:00) Eastern Daylight Time

▾

Set end date

▾

The idea behind this feature is that you can have AMA automatically add new contacts into your campaign for you without having to go through this process manually.

For example, let's imagine you have set up a campaign for all those new contacts who fill out your Landing Page. You have Act! set up so that any contacts who complete the form will automatically be entered into Act! and will automatically be entered into a Dynamic Group. Your Drip Marketing campaign has been set to target this specific Group.

Once you activate your campaign, it is entirely possible that additional individuals will continue to fill out your landing Page and be automatically added to your database. These individuals would not normally be added into the campaign, but with **Campaign List Sync** you can have AMA automatically do this for you. Similarly, if there are any contacts who are no longer in that group (perhaps you have manually removed them), then they can automatically be removed from the campaign as well.

The way this works is, you must turn it on **for each individual Drip marketing campaign**. You then specify how often you want the sync to run. AMA will then check your Act! Groups at the frequency you specify and will add new contacts to the start of your campaign, or remove contacts if they no longer appear in your Groups. If you wish you can also add an end date where it will no longer sync, or you can tell it to sync permanently.

This is a very powerful feature that means you can essentially leave your Landing pages and AMA campaign running permanently and they will provide a very powerful automated service **without any further input from yourself**, saving a huge amount of manual effort.

## Activating Your Campaign

The last step to take is to actually activate your campaign. Again you can do this from the workflow view.

Go to the **Actions** menu and click **Activate**. You will then see the **Activate Campaign** screen.

**Activate Campaign**

Campaign Name	Practice Drip Marketing
Status	Draft
Initial Send	Send on Activation
Sync Enabled	True
Sync Frequency	Daily
Sync Time Of Day	8
Sync Timezone	(GMT -5.00) Eastern Daylight Time
From Email	steven.jackson@sparktest.actops.com
Display Name	Swiftpage
Include Lists	(Groups) Product 1
Exclude Lists	(No exclude lists have been selected)

Activate Campaign

---

**Campaign Actions**

◀ ◁ 1 **2** 3 ▷ ▶ Page: 2 of 3 Go

**Introducing AMA**

✓

Wait time before release: Instant Release

From Email: steven.jackson@sparktest.actops.com (Swiftpage)

Subject Line: Introducing Act! Marketing Automation

Awesome, you have included an unsubscribe

[Edit Email](#)

---

**2nd Attempt**

✓

Send after the No decision.

From Email: steven.jackson@sparktest.actops.com (Swiftpage)

At the top of the screen you will see a brief summary of the campaign you are about to activate, and below that you will see the **Campaign Actions** list. Act! Marketing Automation will go through all of the actions you have set up in your workflow and make sure that they are all valid. Every step that is valid will show a green tick symbol. However if there are any problems, for example, if you did not select a subject line for one of your emails, or you did not include an unsubscribe button, you would see a red cross icon instead:

### Introducing AMA



Wait time before release: Instant Release

From Email: steven.jackson@sparktest.actops.com (Swiftpage)

Subject Line: Introducing Act! Marketing Automation

**Warning, you do not have an unsubscribe merge field**

[Edit Email](#)

In that case, you will see a red message advising the nature of the problem, and you will see a link allowing you to jump straight to the problem so that you can resolve it.

You must fix all errors before you will be able to activate your campaign, the **Activate Campaign** button will be grayed out until you only see green ticks.

Once any problems have been resolved, you can click **Activate Campaign** to begin.

### Activate Campaign

Campaign Name	Practice Drip Marketing
Status	Draft
Initial Send	Send on Activation
Sync Enabled	True
Sync Frequency	Daily
Sync Time Of Day	8
Sync Timezone	(GMT -5.00) Eastern Daylight Time
From Email	steven.jackson@sparktest.actops.com
Display Name	Swiftpage
Include Lists	(Groups) Product 1
Exclude Lists	(No exclude lists have been selected)

**Activate Campaign**

You will now be returned to your workflow view. Note that at the top of the screen, you can see that **Active** now appears next to your campaign name.

Practice Drip Marketing *(Active)*

Actions ▾

Your campaign is now in progress. You can now feel free to leave this area of the program now if you wish, or create additional campaigns too.

# Summary

In this Lesson, you have learned how to:

- Create a Drip Marketing Campaign.
- Add the various different steps available in the workflow.
- Work with the Decision step in order to automate your processes.
- Set up the Campaign List Sync feature.
- Activate the campaign and amend any errors.

# Checking Your Knowledge

Practice 

Having completed this lesson, check your knowledge by performing the following task:

## Create a Drip Marketing Campaign

Using the information provided, create your own multi-step Drip marketing campaign. If you wish to work through the same example presented in the training guide you may do.

Points to keep in mind:

- You may wish to have several colleagues complete your **Landing Page**, and set up a **Dynamic Group** so that you can assign them to your campaign and watch your workflow unfold.
- If you are using this campaign to simply test the feature, you may want to make the **timings** of each step much smaller, instead of waiting a week you could wait a day for example.
- When you add your email steps, make sure to include a **subject** for the email each time, and make sure to include an **unsubscribe option** as well. These are mandatory requirements for every email step in your campaign.
- Make sure that you include at least one **Decision** step if you are able to. This step really highlights the automated nature of the product and demonstrates how much time and effort you can save by using it.
- Try using different **Actions** steps to demonstrate the feature properly. The options you might consider are:
  - Create an Activity
  - Create an Opportunity
  - Send out Notifications
- When **Activating** your campaign, you will not be able to complete this step until every part of your campaign workflow is compliant.