

"Marketing Automation module for PERFEX CRM"

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Thank you for choosing the Marketing Automation module for Perfex CRM. If you have any questions that are beyond the scope of this help file, please feel free to email us via the support item on Codecanyon.

A) Upload & activate the module

* Prior to starting the installation, please make sure that no `open_basedir` restriction is applied to your PHP configuration and that `shell_exec` is enabled. Whereas 95% of the hosting providers around got a proper config that includes the above guides, you may need to adjust your PHP configuration settings if your provider offers these settings disabled by default.

- Steps of Installation:

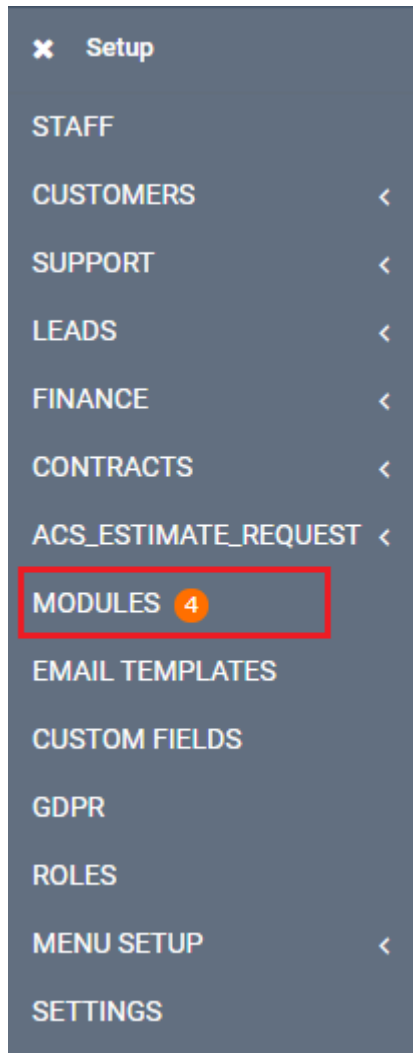
1. Extract your downloaded file content. You will notice a folder called **"documentation"** and a new zip file called **"upload.zip"**. Since the **"documentation"** folder contains documentation files and helpful instructions that are not needed in your RISE CRM's installation, we will focus on the **"upload.zip"** file.

Name	Size	Packed	Type	Modified	CRC32
..			File folder		
documentation			File folder	09-May-20 7:2...	
upload.zip	89,929	83,101	WinRAR ZIP archive	09-May-20 8:0...	0F3E5E9E

2. **"upload.zip"** contains the plugin files (in a plugin format) that you upload in RISE CRM's Plugin installation section.

Name	Size	Packed	Type	Modifi
..			File folder	
documentation			File folder	09-Mi
upload.zip	89,929	83,101	WinRAR ZIP archive	09-M

3. Go to your Perfex CRM's Admin area and select the following menu item: **SETUP > MODULES**.



4. Select the extracted **upload.zip** at the Plugin installation selection prompt and press **INSTALL**.

If you have a module in a .zip format, you may install it by uploading it here.

*Upload Module

Choose File No file chosen INSTALL

5. Find the newly installed module and press **ACTIVATE**.

Marketing Automation	This module helps you to identify potential customers, automating the process of nurturing those leads to sales-readiness.
Activate Uninstall	Version 1.0.0 By GreenTech Solutions

6. You will be told that the module is successfully activated.
7. If the version you have downloaded is larger than the current version, please click **UPGRADE DATABASE** (if available)

Deactivate | Upgrade Database

8. That's it! You are now ready to start using the module.

B) How to use the Marketing Automation module

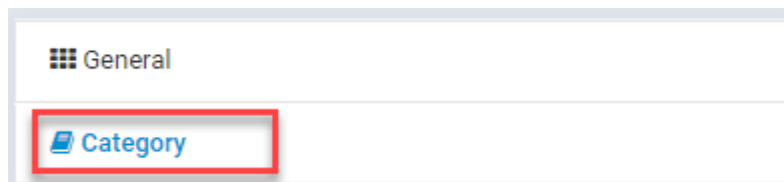
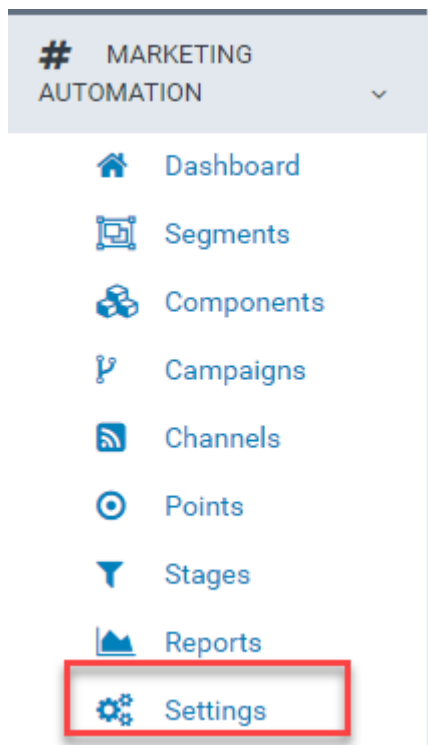
1. Settings

1.1. Category

- Categories are used to manage data types such as asset, campaign, email, marketing message, point action, point trigger, stage, segment, and text message.
 - Asset- Assets: documents, ebooks, and files that we often use to send to our customers.
 - Campaign - Campaign: if you have multiple campaign types, you can manage this way.
Examples: Welcome Campaigns, Offer Campaigns, Confirmation Campaigns, ...
 - Email: manage Email types similar to the Campaigns above.
 - Marketing messages:
 - Point action- Point actions are the times when a contact receives a change in their total score. These actions can be either positive or negative changes and are based on a specific action as you define them... For example, open the email, submit the form, click on the link, and add the product to the cart. ..
 - Point Trigger-
 - Stage: manage customer states stage
 - Segment is the act of classifying and arranging customer information into groups according to given conditions.
 - Text messages

1.2.1. Add category

- Step 1: Access the Marketing Automation module -> Select Settings -> select Category



Step 2: Click **ADD** -> The system displays a popup Category

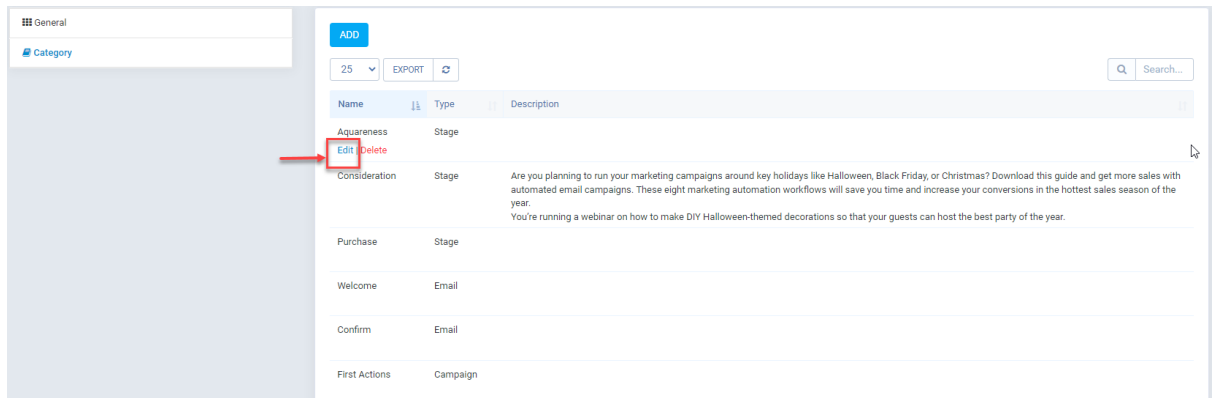
A screenshot of the 'Category' popup form. The form has a blue header with the title 'Category' and a close button. The fields are: 'Name' (text input), 'Type' (dropdown menu with 'Segment' selected), 'Color' (color picker), and 'Description' (rich text editor). The rich text editor toolbar includes options for File, Edit, View, Insert, Format, Tools, and Table, along with various text formatting icons. At the bottom right are 'CLOSE' and 'SAVE' buttons.

* Explain:

- Name: enter a reminder name
- Type: choose the type of this category
- Color: choose a color that reminds you to sort and search later.
- Description: a detailed description of this category. You should describe the meaning clearly and in as much detail as possible.

1.2.2. Update

- Step 1. Go to category -> Select the data line to edit -> click Edit



- Step 2. Update data and press



The screenshot shows a 'Category' update form. It has a blue header with the title 'Category' and a close button. The form contains four fields: 'Name' (text input with 'Aquareness'), 'Type' (dropdown menu with 'Stage'), 'Color' (text input with '#160ce1' and a color swatch), and 'Description' (text area). At the bottom right, there are 'CLOSE' and 'SAVE' buttons.

1.2.3. Delete

- Step 1: Access the Marketing Automation module -> select Settings -> select Category -> Select the corresponding line you want to delete -> Select Delete function
- Step 2: The system displays the Confirmation popup. Press Delete to confirm the deletion or press Cancel to cancel the deletion

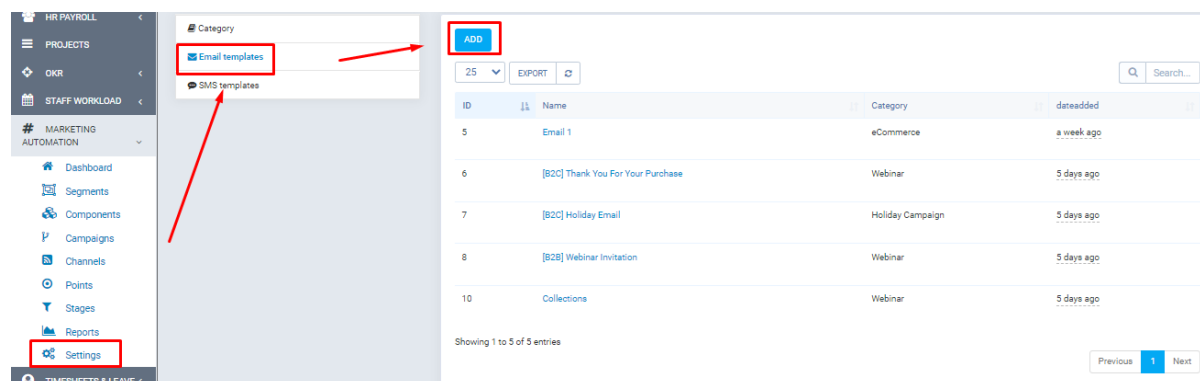
1.2. Email templates

- templates screen is used to create and manage email templates.

The data at this screen is used for the Emails screen in the Channel menu

1.3.1. Add Email Template

- Step 1: Select the Settings menu -> Select the Email templates screen -> Select the Add function on the screen



- Step 2: The system will display the Email Template screen -> Proceed to enter the necessary values -> Select Save to save the action you just made and move to step 3 or select Back to return to the previous screen

Email Template

Name

Category

None selected

Color

Published

☒ Yes
 ☐ No

Language

English

Description

File Edit View Insert Format Tools Table

Verdana 12pt

A

B

I

U

Text Color

Background Color

Link

* Explanation:

- The Name field is used to enter the name of the Email Template
- The Category field is used to select the type of Email Template. This field data is taken from the Category screen of section 1.2, and only the Categories of type Email Template
- The Color field is used to select a recall color for later sorting and searching.
- Published field: If Yes is selected, the successfully created Email Template will be allowed to use. If No is selected, otherwise it is not allowed to display
- The Language field is used to select the language for the email template. This function will later develop to support transferring email templates in accordance with the selected language

- Step 3: After saving the information successfully, the system will display the information screen and the sample design screen-> Select the Design function in the Preview tab screen

Email Template

General Details

Name	Email Template 27/08	Date Creator	2022-08-27 09:22:47
Category	Newsletter	Added from	GTSSolution Company
Published	Yes	Description	Email Template 27/08
Language	vietnamese		

[Preview](#) [Statistics](#) [Leads](#)

DESIGN

- Step 4: The system will display a screen containing functions to design an Email Template ->. Drag and drop the functions available on the screen -> Select Save to save the operation.

No content here. Drag content from right.

COLUMNS

BUTTON

DIVIDER

HEADING

HTML

IMAGE

MENU

TEXT

by Unlayer Editor

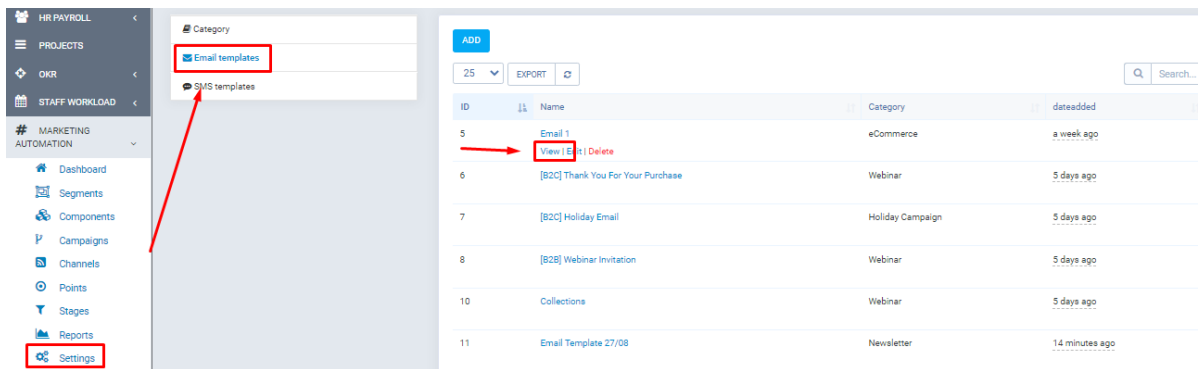
Available merge fields

Leads	Other	
Lead Name	(lead_name)	CRM URL (crm_url)
Lead Email	(lead_email)	Admin URL (admin_url)
Lead Position	(lead_position)	Main Domain (main_domain)
Lead Website	(lead_website)	Company Name (companyname)
Lead Description	(lead_description)	Email Signature (email_signature)
Lead Phone Number	(lead_phonenumber)	(GDPR) Terms & Conditions URL (terms_and_conditions_url)
Lead Company	(lead_company)	(GDPR) Privacy Policy URL (privacy_policy_url)
Lead Country	(lead_country)	
Lead Zip	(lead_zip)	
Lead City	(lead_city)	
Lead State	(lead_state)	
Lead Address	(lead_address)	
Lead Assigned	(lead_assigned)	

SAVE

1.3.2. View

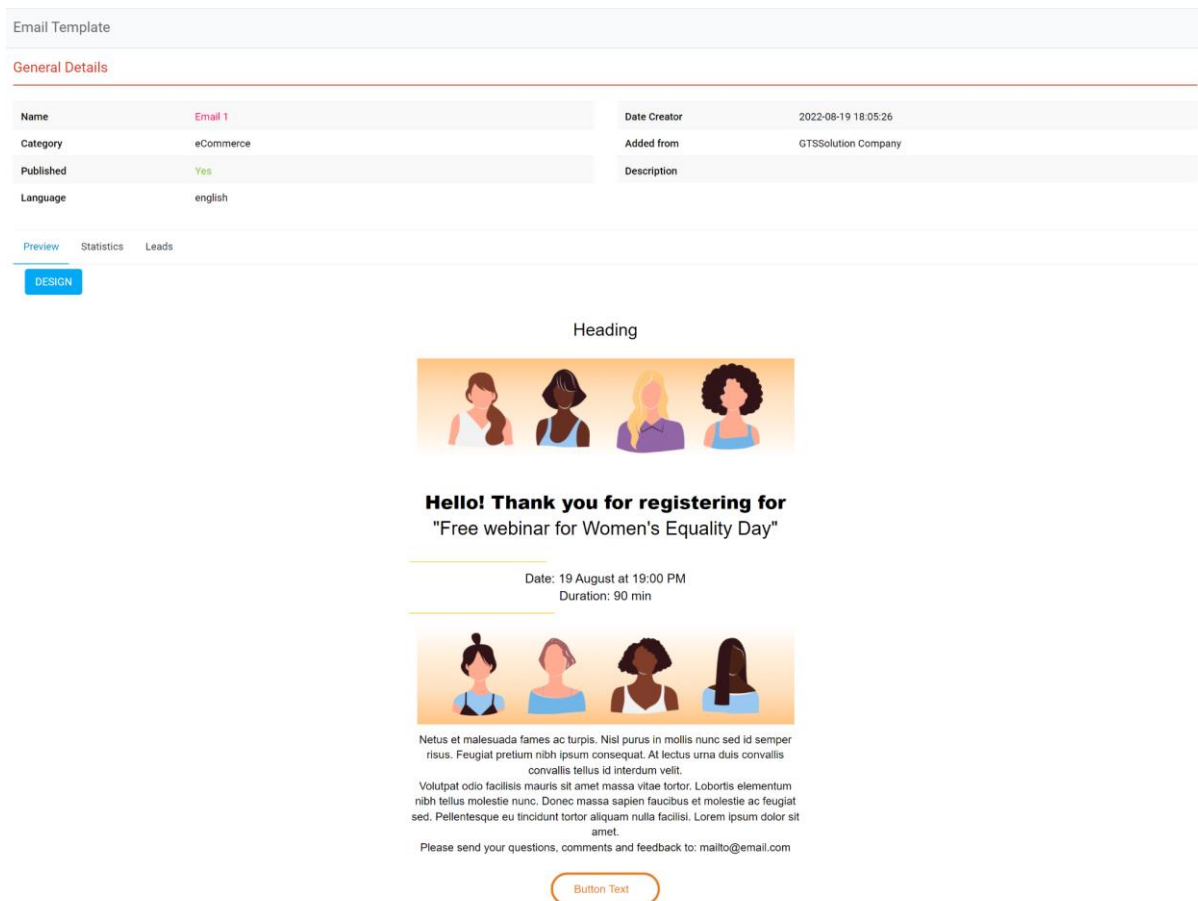
- Step 1: Select Menu Setting -> Select the Email Templates screen -> Select the View function corresponding to the data line to see detailed information



The screenshot shows the PERFEX CRM interface. On the left, the 'MARKETING AUTOMATION' menu is expanded, with 'Email templates' highlighted. A red arrow points from the 'Email templates' menu item to the 'View' button in the 'Email 1' row of the table. The table lists various email templates with columns for ID, Name, Category, and dateadded.

ID	Name	Category	dateadded
5	Email 1	eCommerce	a week ago
6	[B2C] Thank You For Your Purchase	Webinar	5 days ago
7	[B2C] Holiday Email	Holiday Campaign	5 days ago
8	[B2B] Webinar Invitation	Webinar	5 days ago
10	Collections	Webinar	5 days ago
11	Email Template 27/08	Newletter	14 minutes ago

- Step 2: The system will display a screen containing the information of the corresponding Email Template



The screenshot shows the 'Email Template' details screen. The 'General Details' section includes fields for Name, Category, Published, Language, Date Creator, Added from, and Description. Below this, there are tabs for 'Preview', 'Statistics', and 'Leads'. The 'DESIGN' button is highlighted. The design preview shows a heading, a list of four women's avatars, a main heading, a date and duration, another list of four women's avatars, and a paragraph of placeholder text.

General Details

Name	Email 1	Date Creator	2022-08-19 18:05:26
Category	eCommerce	Added from	GTSSolution Company
Published	Yes	Description	
Language	english		

Design Preview:

Heading

Four women's avatars

Hello! Thank you for registering for "Free webinar for Women's Equality Day"

Date: 19 August at 19:00 PM
Duration: 90 min

Four women's avatars

Netus et malesuada fames ac turpis. Nisi purus in mollis nunc sed id semper risus. Feugiat pretium nibh ipsum consequat. At lectus urna duis convallis convallis tellus id interdum velit.

Voluptat odio facilisis mauris sit amet massa vitae tortor. Lobortis elementum nibh tellus molestie nunc. Donec massa sapien faucibus et molestie ac feugiat sed. Pellentesque eu tincidunt tortor aliquam nulla facilisi. Lorem ipsum dolor sit amet.

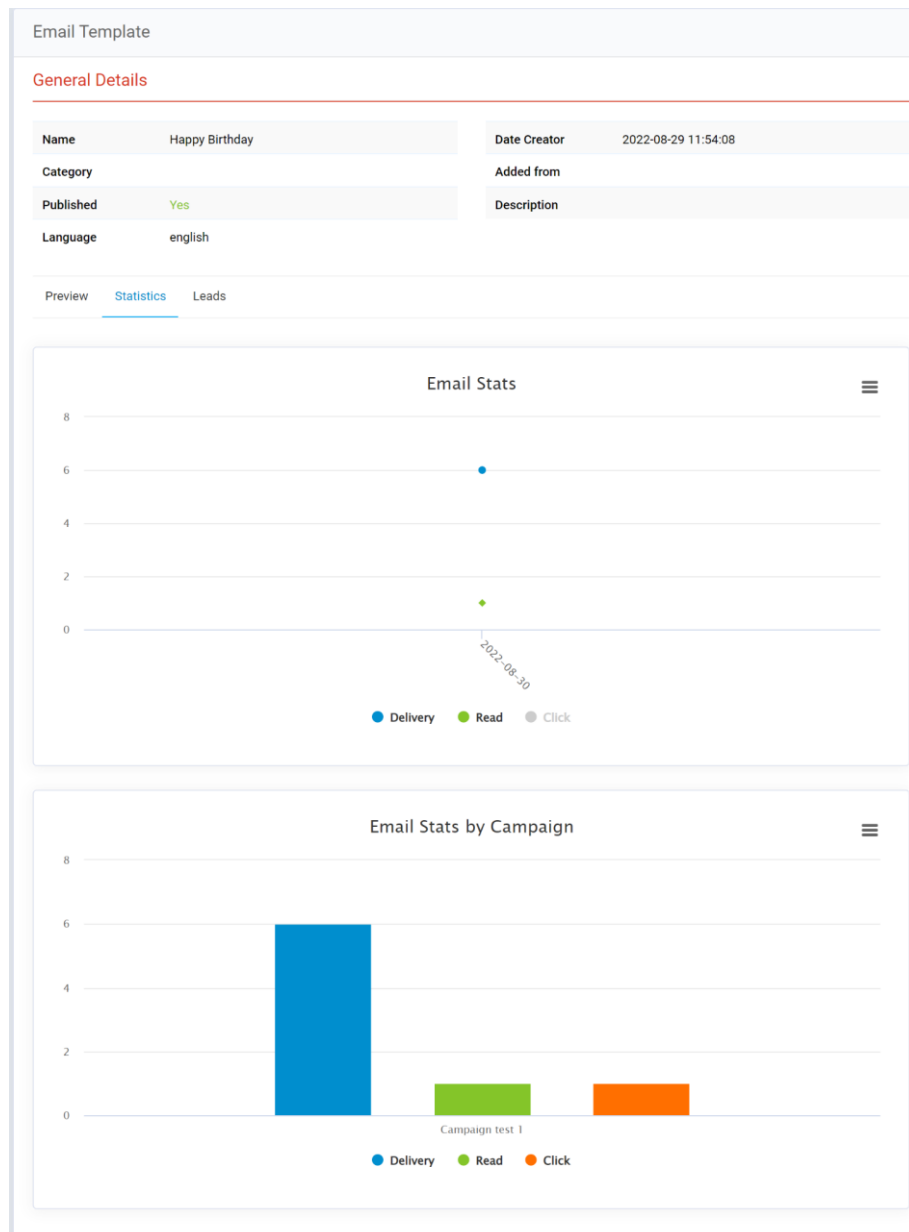
Please send your questions, comments and feedback to: mailto@email.com

Button Text

* Explanation:

- The Preview tab will display the previously designed Email Template. Select the Design function to proceed with editing the email template
- Statistics tab screen

- The Email Stats chart will show the number of leads sent to the corresponding email, the number of leads who read the email, and the number of leads who clicked on the link in the email in the corresponding email template.
- The Email Statis by campaign chart will show the number of leads who have been emailed, have read the email, and clicked on the link in the email of the corresponding Email Template of the Campaign with the selected email belonging to the corresponding Email Template.



- The Leads tab screen will display a list of current leads that have been emailed under the corresponding Email Template

Email Template

General Details

Name

Happy Birthday

Category

Holiday Campaign

Published

Yes

Language

english

Date Creator

2022-08-29 11:54:08

Added from

Description

Preview

Statistics

Leads

25

EXPORT

Q

Search...

<input type="checkbox"/>	#	Name	Company	Email	Phone	Lead Value	Tags	Assigned	Status	Source	Last Contact	Created
<input type="checkbox"/>	5	Mai Thị Thuý Tiên		test1@gtssolution.work	0373185504				<div>status1</div>	Facebook		one year ago
<input type="checkbox"/>	6	Ngô Quang Trường		test2@gtssolution.work	0373185504				<div>status1</div>	Facebook		one year ago
<input type="checkbox"/>	7	Phan Thị Cẩm Ly		test5@gtssolution.work					<div>status1</div>	Facebook		one year ago
<input type="checkbox"/>	23	Nguyễn Văn A		test9@gtssolution.work	0373185509				<div>Open</div>	Bing		2 weeks ago
<input type="checkbox"/>	26	Phạm Thị Bích Thuý		test3@gtssolution.work	Điện thoại: 0373789964				<div>Open</div>	Bing		24 hrs ago
<input type="checkbox"/>	28	Nguyễn Văn Trường		test8@gtssolution.work	0373185504				<div>Open</div>	Bing		4 hrs ago

1.3.3. Clone

Clone function used to copy data Email Template

- Step 1: Select the Settings menu -> Select the Email Template screen -> Select the Clone function corresponding to the Email Template line that needs to be cloned

The screenshot shows the PERFEX CRM interface. On the left, the 'Settings' menu is highlighted. In the center, the 'Email templates' screen is displayed, showing a list of templates. The 'Clone' function is highlighted for the first template (ID 5).

ID	Name	Category	Created
5	Email 1	eCommerce	2 weeks ago
6	[BOC] Thank You For Your Purchase	Webinar	a week ago
7	[BOC] Holiday Email	Holiday Campaign	a week ago
8	[BOB] Webinar Invitation	Webinar	a week ago
10	Collections	Webinar	a week ago
11	Email Template 27/08	Newsletter	3 days ago
12	Fitness		2 weeks ago

- Step 2: The system will display the Clone template screen -> Enter the necessary information -> Select Save

Clone template

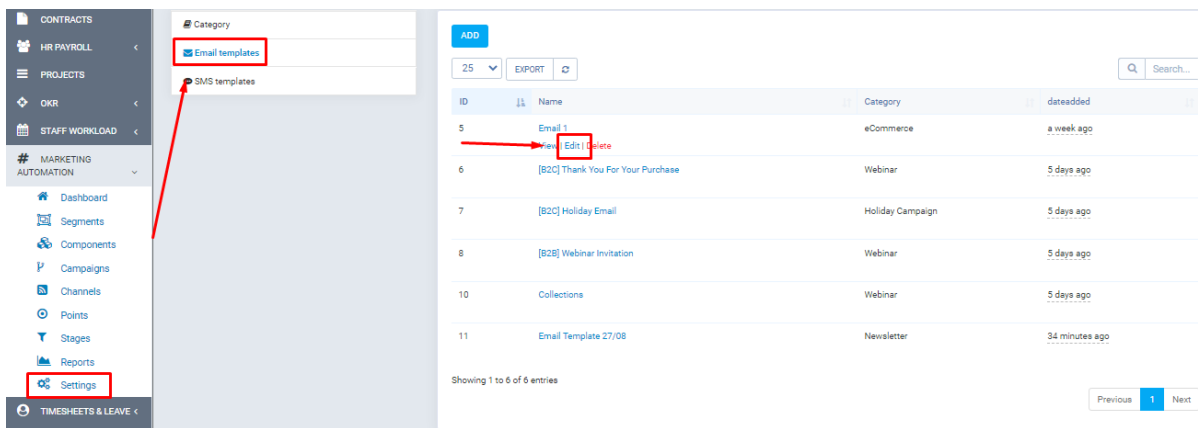
Name

CLOSE

SAVE

1.3.4. Update

- Step 1: Select the Settings menu-> Select the Email Template screen -> Select the Edit function corresponding to the Email Template line that needs to be edited



- Step 2: Update data and press

SAVE

Email Template

Name:

Category:

Color:

Published: ☒ Yes ☐ No

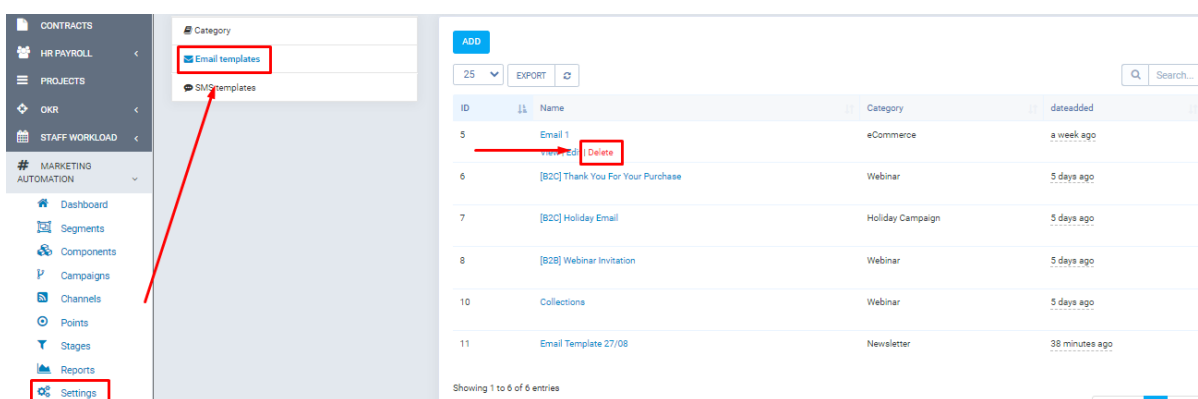
Language:

Description:

File Edit View Insert Format Tools Table Verdana 12pt [Rich Text Editor]

1.3.5. Delete

- Step 1: Access the Marketing Automation module -> Select the Settings menu -> Select the Email Template screen -> Select the corresponding line you want to delete -> Select the Delete function



- Step 2: The system displays the Confirmation popup. Press Delete to confirm the deletion or press Cancel to cancel the deletion

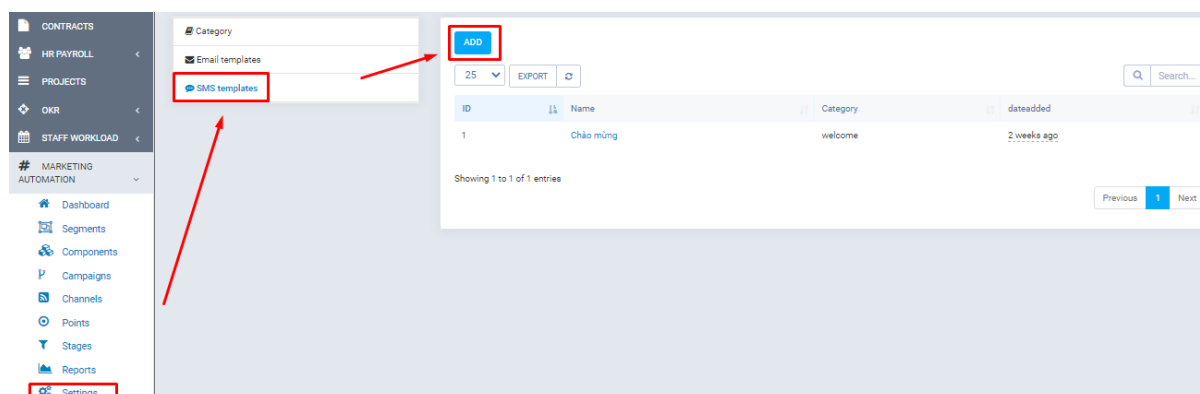
1.3. SMS templates

SMS templates screen for creating and managing SMS templates

The data at this screen is used for the SMS screen in the Channels menu

1.4.1. Add SMS template

- Step 1: Select the Settings menu -> Select the SMS Templates screen -> Select the Add function included in the screen



- Step 2: The system will display the EMS Template screen -> Enter the necessary values -> Select Save to save the action you just made or select Back to return to the previous screen

SMS template

Name

Category

Language

Published

Description

BACK SAVE

Available merge fields

Leads	Other
Lead Name	CRM URL
Lead Email	Admin URL
Lead Position	Main Domain
Lead Website	Company Name
Lead Description	Email Signature
Lead Phone Number	(GDPR) Terms & Conditions URL
Lead Company	(GDPR) Privacy Policy URL
Lead Country	
Lead Zip	
Lead City	
Lead State	
Lead Address	
Lead Assigned	
Lead Status	
Lead Source	
Lead Link	
CF	
How likely are you to recommend us to a friend	
Role	

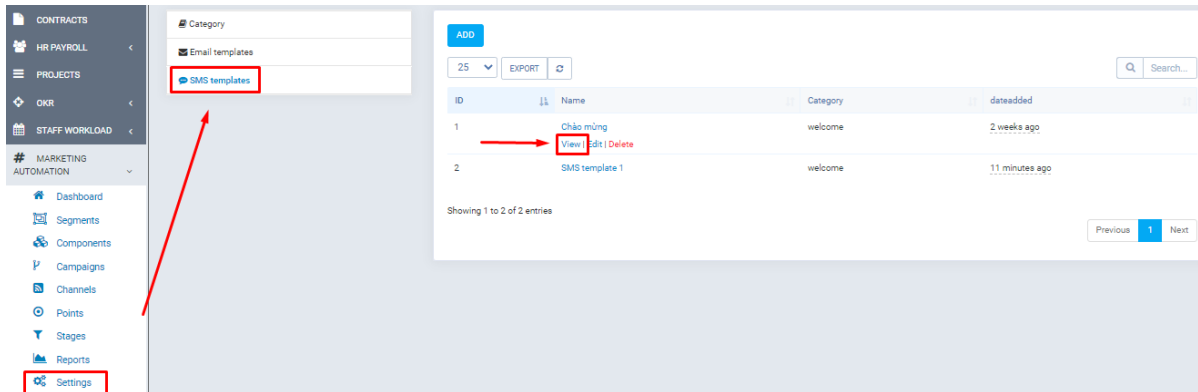
* Explanation:

- The Name field is used to enter the name of the SMS Template
- The Category field is used to select the type of SMS Template. This field data is taken from the Category screen of item 1.2, and only the Categories of type SMS Template
- The Language field is used to select the language for the email template. This function will develop later to support transferring SMS templates to the selected language
- Published field: If Yes is selected, the successfully created SMS Template will be allowed to be used and displayed on the SMS screen of Channels. If No is selected, otherwise it is not allowed to display

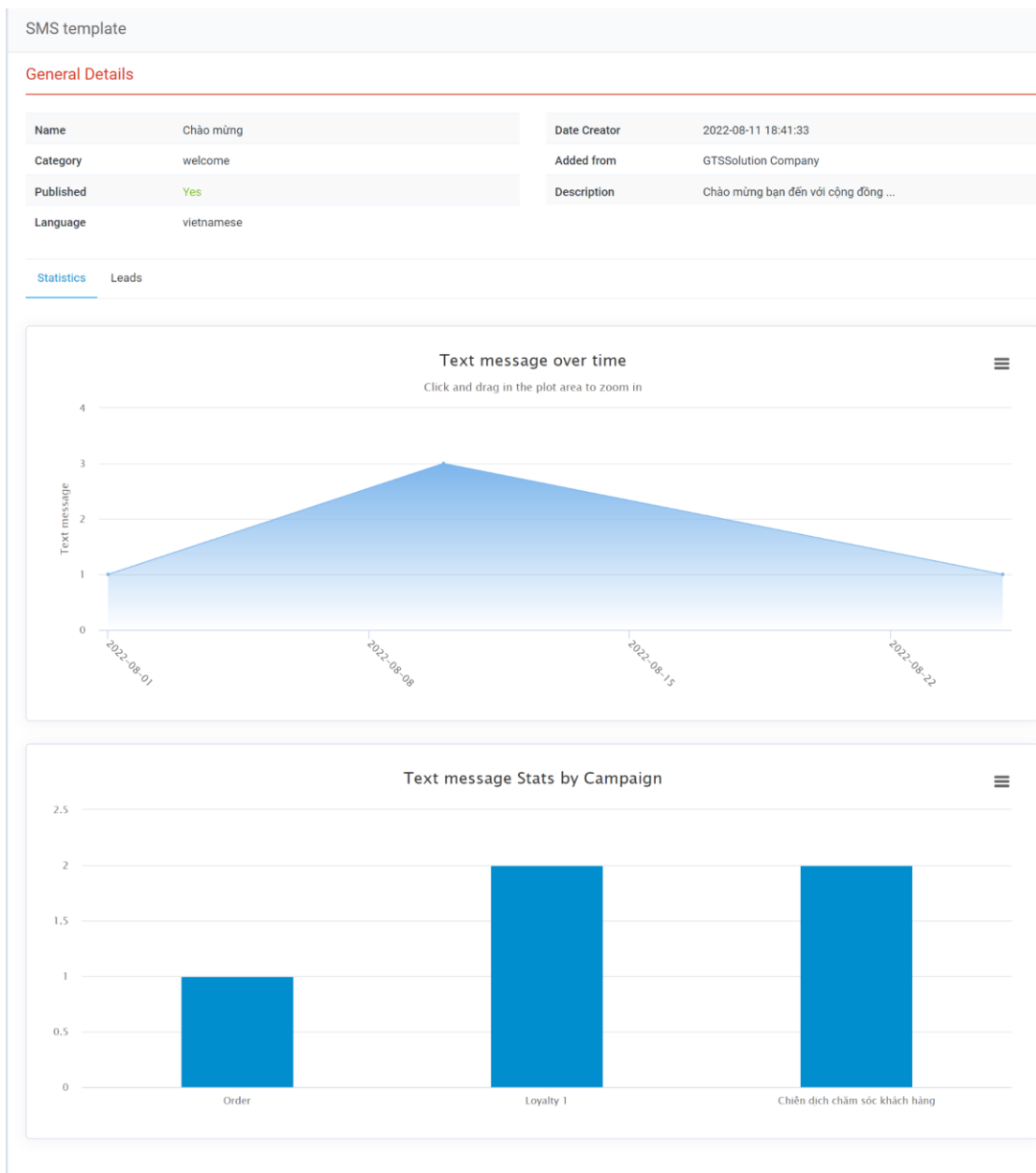
- The Description field is used to design the SMS template through the system's data collection fields to display the Available merge fields

1.4.2. View

- Step 1: Select the Settings menu -> Select the SMS Templates screen -> Select the View function corresponding to the data line to see detailed information



- Step 2: The system will display a screen containing the information of the corresponding SMS Template

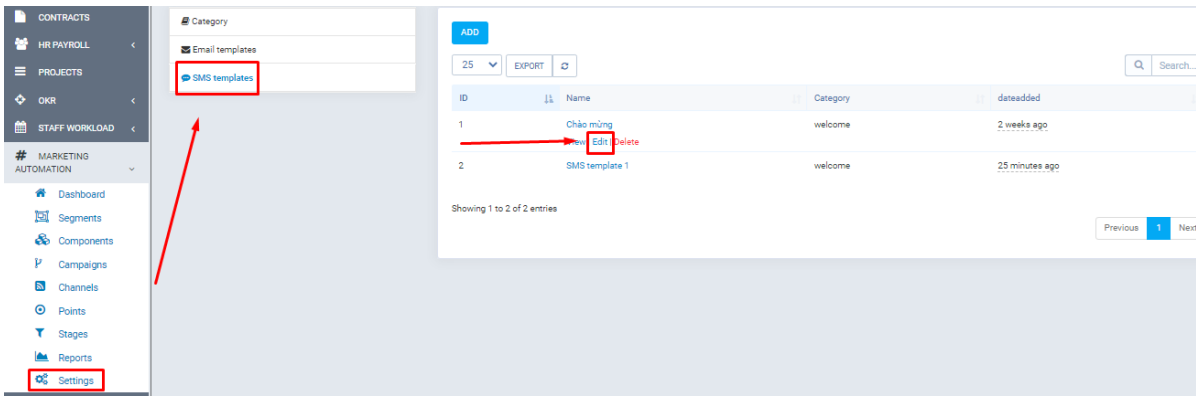


* Explanation:

- Statistics tab screen
 - The Text message over time chart will show an overview of the number of SMS-sent leads belonging to the corresponding SMS Template
 - The Text message Statis by campaign chart will list the number of SMS templates belonging to the corresponding campaign (this field data is based on the Campaign campaign that selects the SMS belonging to the corresponding SMS template)
- The Leads tab screen will display a list of the remaining leads of the current SMS template

1.4.3. Update

- Step 1: Select the Settings menu-> Select the SMS Template screen -> Select the Edit function corresponding to the SMS Template line that needs to be edited



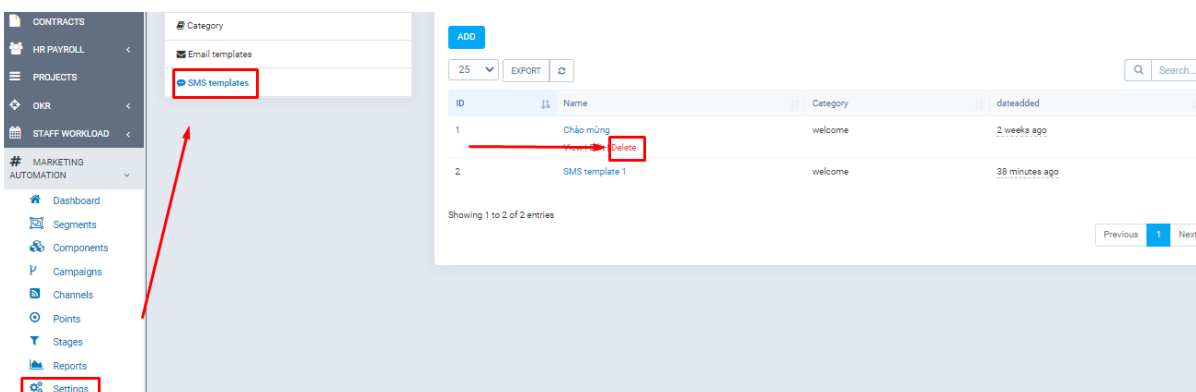
- Step 2: Update data and press

SAVE

The screenshot shows the 'SMS template' form and the 'Available merge fields' list. The form has the following fields: Name (Chào mừng), Category (welcome), Language (Vietnamese), Published (Yes/No), and Description (Chào mừng bạn đến với cộng đồng). The 'Available merge fields' list includes various lead and company attributes, such as Lead Name, Lead Email, Lead Position, Lead Website, Lead Description, Lead Phone Number, Lead Company, Lead Country, Lead Zip, Lead City, Lead State, Lead Address, Lead Assigned, Lead Status, Lead Source, Lead Link, CF, and Role.

1.4.4. Delete

- Step 1: Access the Marketing Automation module -> Select the Settings menu -> Select the SMS Template screen -> Select the corresponding line you want to delete -> Select the Delete function



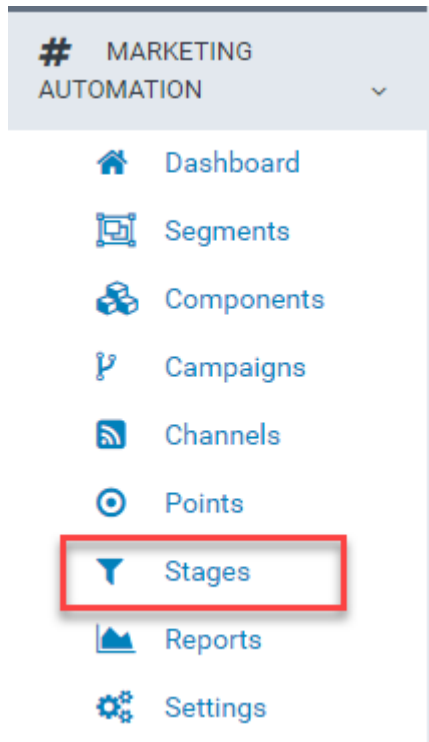
- Step 2: The system displays the Confirmation popup. Press Delete to confirm the deletion or press Cancel to cancel the deletion


2. Stage

- ❖ Allows creating stages to convert leads into leads. It will usually take the form of a funnel.
- ❖ Contact will be staged by going through a campaign.
- ❖ The data at this screen will be used for the Campaigns screen

2.1. Add stage

- Step 1: Access the Marketing Automation module -> select Stages



- Step 2: Click  -> the system displays popup Stages

Stages [X]

* Name

* Weight

Color

Category
None selected

Description

File Edit View Insert Format Tools Table

Verdana 12pt A A B I [List Icons] [Link Icon] [Undo Icon]

[CLOSE] [SAVE]

*** Explain:**

- Name: Enter a reminder name
- Weight: this is how you determine the progression of your stages. The higher the stage weight number, the more contact in the hopper. Contacts cannot move back to stages with lower weights.
- Color: choose a color that reminds you to sort and search later.
- Category: Data were taken from the category set
- Description: we recommend adding a description to help you and other users easily identify what qualifies as contacts for that stage.

2.2. View

- Step 1: Select the Stages screen -> Select the View function corresponding to the data line to see detailed information

Stages Summary

Stage	Count
Total Stages	9
Advocacy	1
Awareness	2
Consideration	2
Purchase	3
Retention	1

Uncategorized: 0

Name	weight	Category	Published
Booking online	2	Purchase	<input checked="" type="checkbox"/>
Direct mail	4	Consideration	<input checked="" type="checkbox"/>
In store	2	Purchase	<input checked="" type="checkbox"/>

- Step 2: The system will display a screen containing the information of the corresponding Stage

Stage: Booking online

Metadata:

- Name: Booking online
- Category: Purchase
- Weight: 2
- Published: Yes
- Date Creator: GTSSolution Company
- Added from: GTSSolution Company

Description: You are running a webinar on how to make DIY Halloween-themed decorations so that your guests can host the best party of the year. Are you planning to run your marketing campaigns around key holidays like Halloween, Black Friday, or Christmas? Download this guide and get more sales with automated email campaigns. These eight marketing automation workflows will save you time and increase your conversions in the hottest sales season of the year.

Statistics:

- Total number of lead: 4
- Number of active campaigns: 0
- Number of campaigns participated: 0

Leads in time: A line chart showing the number of leads added (green) and removed (orange) over time from 2022-08-01 to 2022-08-21. The chart shows a peak in added leads around 2022-08-03 and a steady increase in removed leads over time.

Stage Stats by Campaign: A bar chart showing the number of leads for different campaigns. The campaigns and their lead counts are: Order (1), Loyalty 1 (4), and Chiến dịch chăm sóc khách hàng (2).

*** Explanation:**

- The Total number of leads field will display the total number of leads currently in the respective stage
- The number of active campaigns field will display the total number of active campaigns that have the corresponding stage selected and are still valid (based on the start date and end date in the campaign).

- The number of campaigns fielded will display the total number of participating campaigns that have selected the corresponding stage and have passed the validity period (based on the start date and end date in the campaign)
- The Leads in time chart will show an overview of the number of leads added and removed by the date of the respective stage
- The Stage Statis by campaign chart will show the number of stages belonging to the corresponding campaign (this field data is based on the Campaign campaign with the corresponding stage selected).

2.3. Update

- Step 1. Go to Stages-> Select the data line to edit -> click Edit

Stages Summary					
8	1	2	2	2	1
Total Stages	Advocacy	Awareness	Consideration	Purchase	Retention

25	EXPORT	REFRESH
----	--------	---------

Name	Weight	Category	Published
Booking online View Edit Delete	2	Purchase	<input checked="" type="checkbox"/>
Direct mail	4	Consideration	<input checked="" type="checkbox"/>
In store	2	Purchase	<input checked="" type="checkbox"/>
Loyalty Program	3	Retention	<input checked="" type="checkbox"/>
Online advs	1	Awareness	<input checked="" type="checkbox"/>
PR	1	Awareness	<input checked="" type="checkbox"/>

- Step 2. Update data and press

SAVE

Stages

Name

Booking online

Weight

2

Color

#e6ca14

Category

Purchase

Description

You are running a webinar on how to make DIY Halloween-themed decorations so that your guests can host the best party of the year. Are you planning to run your marketing campaigns around key holidays like Halloween, Black Friday, or Christmas? Download this guide and get more sales with automated email campaigns. These eight marketing automation workflows will save you time and increase your conversions in the hottest sales season of the year.

CLOSE

SAVE

2.4. Delete

- Step 1: Access the Marketing Automation module -> select Stages -> Select the corresponding line you want to delete -> Select the Delete function

Name	weight	Category	Published
Booking online	2	Purchase	<input checked="" type="checkbox"/>
View Edit Delete			
Direct mail	4	Consideration	<input checked="" type="checkbox"/>
In store	2	Purchase	<input checked="" type="checkbox"/>

- Step 2: The system displays the Confirmation popup. Press Delete to confirm the deletion or press Cancel to cancel the deletion

3. Segment

Used to classify and sort customer information into groups according to given conditions

3.1. Add segment

- Step 1: Access the Marketing Automation module -> select Segments

- Dashboard
- Segments**
- Components
- Campaigns
- Channels
- Points
- Stages
- Reports
- Settings

- Step 2: Click **NEW** -> system redirects to the Segment page

The screenshot shows the 'Segment' form with the 'Details' tab selected. The form includes a 'Name' field, a 'Color' field, 'Public Segment' and 'Published' checkboxes (both set to 'Yes'), and a 'Description' field with a rich text editor. A 'SAVE' button is located at the bottom right of the form.

* Explain:

Details tab: used to enter basic information of the segment

Filters tab: used to enter the conditions of the segment

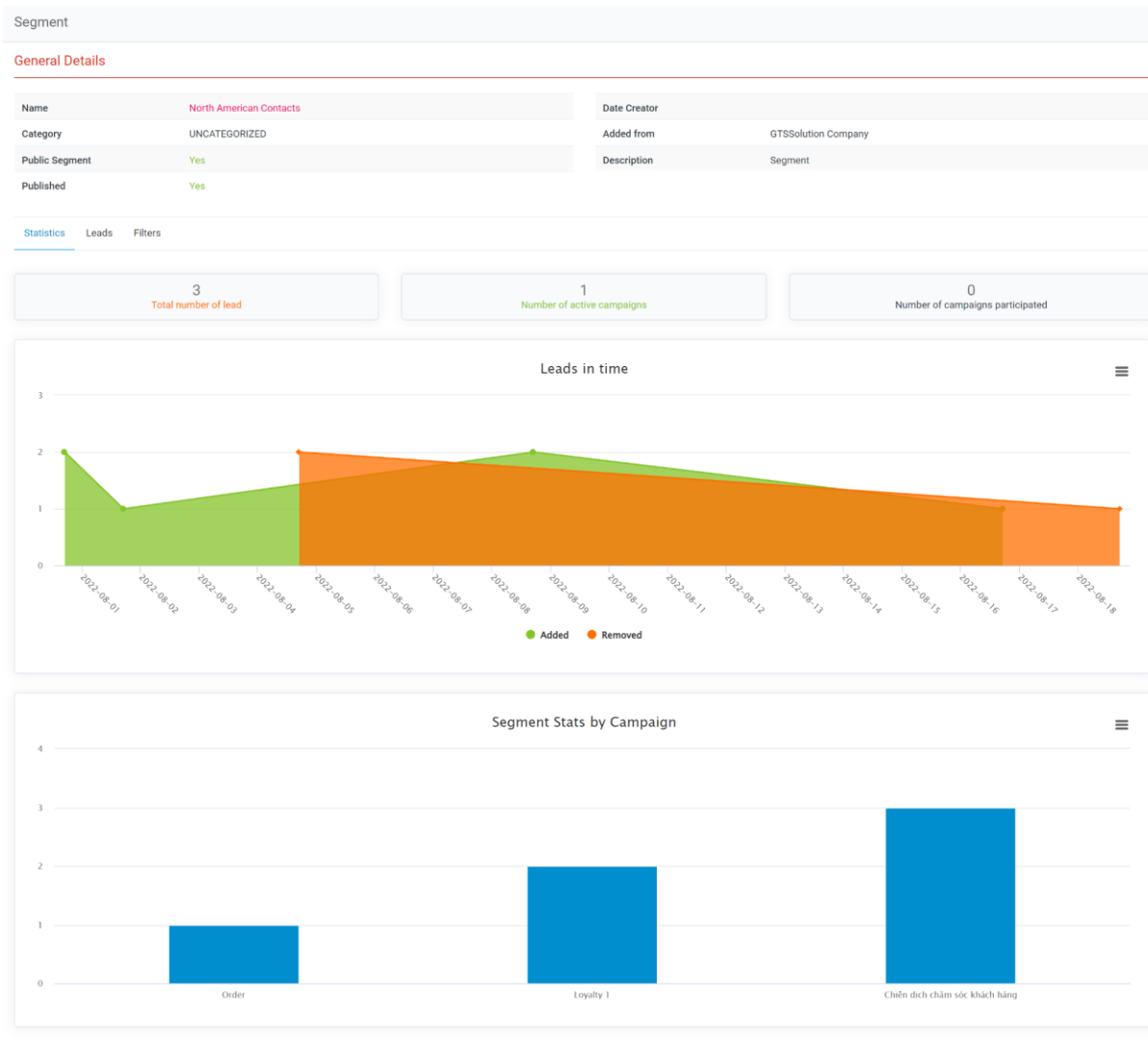
3.2. View

- Step 1: Select the Segments screen -> Select the View function corresponding to the data to see detailed information

The screenshot shows the 'Segments' screen. The left sidebar has the 'Segments' menu item highlighted. The main area displays a 'Segments Summary' table and a list of segments. The 'Segments Summary' table has columns for Name, Leads, Category, and Published status. The list of segments has columns for Name, Leads, Category, and Published status.

Name	Leads	Category	Published
Abandoned Cart	17	WEBINAR	ON
Former Customers	15	BEHAVIORAL	OFF
North American Contacts	13	UNCATEGORIZED	ON
Rest of World Contacts	16	GEOGRAPHICS	ON

- Step 2: The system will display a screen containing the information of the corresponding Segment



* Explanation:

- Statistics tab screen
 - The Total number of leads field will show the total number of current leads in the respective segment
 - The number of active campaigns field will display the total number of active campaigns that have the corresponding segment selected and are still valid (based on the start date and end date in the campaign)
 - The number of campaigns participated field will display the total number of participating campaigns that have selected the corresponding segment and have passed the validity period (based on the start date and end date of the campaign).
 - The Leads in time chart will show an overview of the number of leads added and removed by the date of the corresponding segment when running the campaign. * Note: when running the campaign to select the Change segment, if two segments are not of the same category, the lead will be added to the new segment, and the information in

the old segment will still be preserved, but if two segments have the same category, the lead will be transferred all information to

- The Segment Statis by campaign chart will show the number of Segments belonging to the corresponding campaign (this field data is based on the Campaign campaign with the corresponding segment selected).
- The Leads tab screen will display a list of the remaining leads currently in the respective Segment

3.3. Update

- Step 1. Go to Segments -> Select the data line to edit -> click Edit

Segments Summary				
11	4	4	2	1
Total Segments	BEHAVIORAL	DEMOGRAPHICS	GEOGRAPHICS	PSYCHOGRAPHICS

25	EXPORT	
----	--------	--

Name	Leads	Category	Published
Age	5	DEMOGRAPHICS	<input checked="" type="checkbox"/>
Country	3	GEOGRAPHICS	<input checked="" type="checkbox"/>
Education	8	DEMOGRAPHICS	<input checked="" type="checkbox"/>
Gender	6	DEMOGRAPHICS	<input checked="" type="checkbox"/>
Income	7	DEMOGRAPHICS	<input checked="" type="checkbox"/>
Intent	11	BEHAVIORAL	<input checked="" type="checkbox"/>

- Step 2. Update data and press

SAVE

Segment

Details

Filters

Name

Age

Category

DEMOGRAPHICS

Color

#1b1eda

Public Segment

☒ Yes ☐ No

Published

☒ Yes ☐ No

Description

File Edit View Insert Format Tools Table

Verdana 12pt

Độ tuổi

SAVE

3.4. Delete

- Step 1: Access the Marketing Automation module -> select Segments -> Select the corresponding line you want to delete -> Select the Delete function

Segments Summary				
11	4	4	2	1
Total Segments	BEHAVIORAL	DEMOGRAPHICS	GEOGRAPHICS	PSYCHOGRAPHICS
<div>25 EXPORT REFRESH</div>				
Name	Leads	Category	Published	
Age	5	DEMOGRAPHICS	<input checked="" type="checkbox"/>	
View Edit Delete				
Country	3	GEOGRAPHICS	<input checked="" type="checkbox"/>	
Education	8	DEMOGRAPHICS	<input checked="" type="checkbox"/>	
Gender	6	DEMOGRAPHICS	<input checked="" type="checkbox"/>	
Income	7	DEMOGRAPHICS	<input checked="" type="checkbox"/>	
Intent	11	BEHAVIORAL	<input checked="" type="checkbox"/>	

- Step 2: The system displays the Confirmation popup. Press Delete to confirm the deletion or press Cancel to cancel the deletion

4. Components

Consists of 2 main features:

Assets: helps you create and manage files like PDF, Zip, img, doc, mp4...

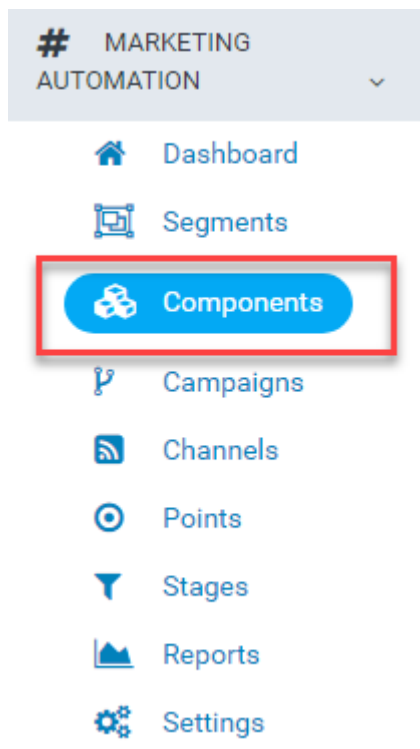
Forms (forms) you will create and manage all forms to collect customer information here.

4.1. Assets

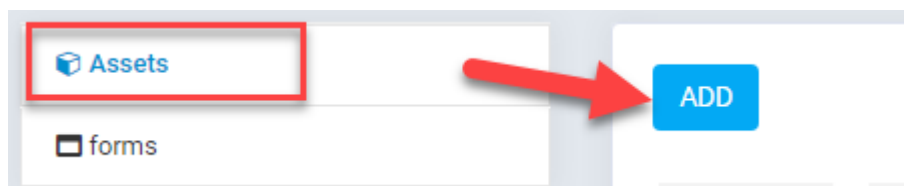
This is the part where you manage files such as images, audio, video, pdf or zip files, doc, excel ...

4.1.1. Add assets

- Step 1: Access the Marketing Automation module -> select Components



- Step 2: Select Assets -> Click **ADD** -> the system redirects to the Add new page



- Step 3: Enter data in the fields

The image shows the 'Add new' form for Assets. The form includes the following fields and options:

- Name:** A text input field.
- Category:** A dropdown menu with 'None selected'.
- Color:** A color selection field.
- Published:** Radio buttons for 'Yes' (selected) and 'No'.
- Description:** A rich text editor with a toolbar containing options like File, Edit, View, Insert, Format, Tools, and Table. The toolbar also includes text formatting options like font face (Verdana), font size (12pt), bold, italic, and list creation.
- Attachment:** A dashed box labeled 'Attachment' for uploading files.

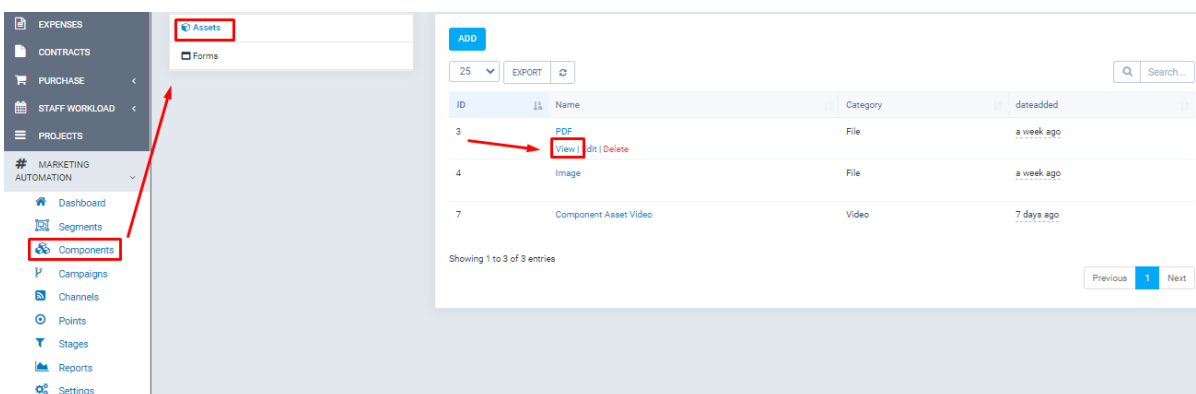
A **SAVE** button is located at the bottom right of the form.

* Explain:

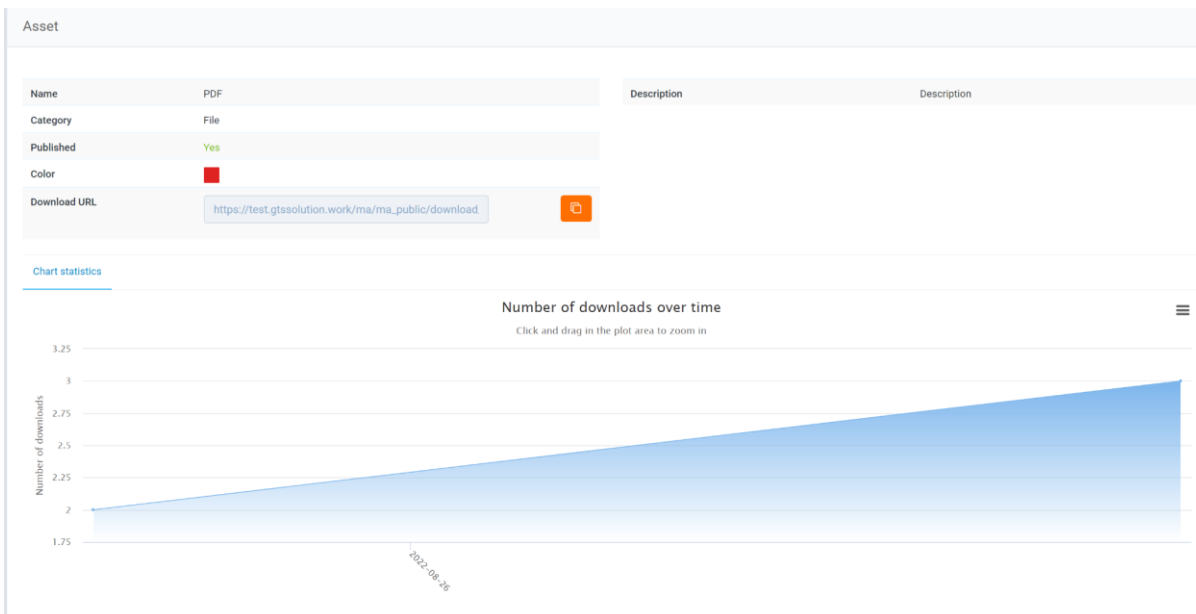
- Name: enter the property name
- Category: taken from setting category with type as an asset
- Color: choose a color that reminds you to sort and search later.
- Published: choose to publish or not
- Description: enter a detailed description of the property
- Attachment: used to select the file to upload for this asset

4.1.2. View

- Step 1: Select the Component menu -> Select the Asset screen -> Select the View function corresponding to the data to be viewed



- Step 2: The system will display a screen containing the information of the corresponding Asset

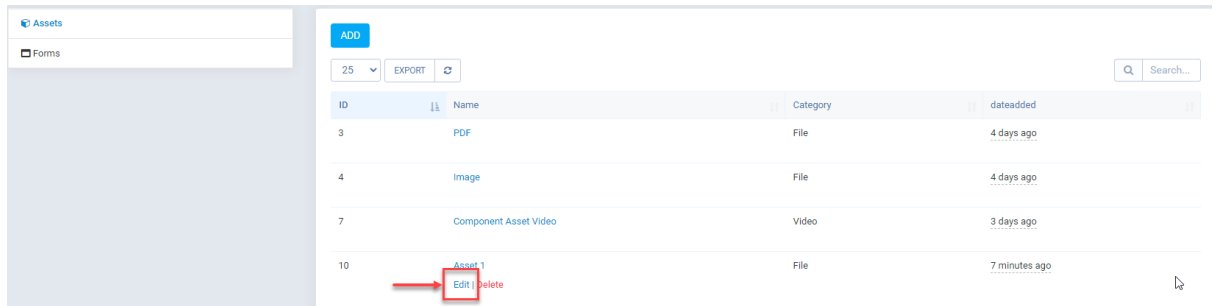


* Explanation:

- Copy link function is used to copy the link containing the file and download it to your computer
- The Chart Statistics chart will show the number of file downloads per day

4.1.3. Update

- Step 1. Go to Components -> Assets => Select the data line to edit -> click Edit



- Step 2. Update data and press

SAVE

Edit Asset

Name: Asset 1

Category: File

Color: #df0fc4

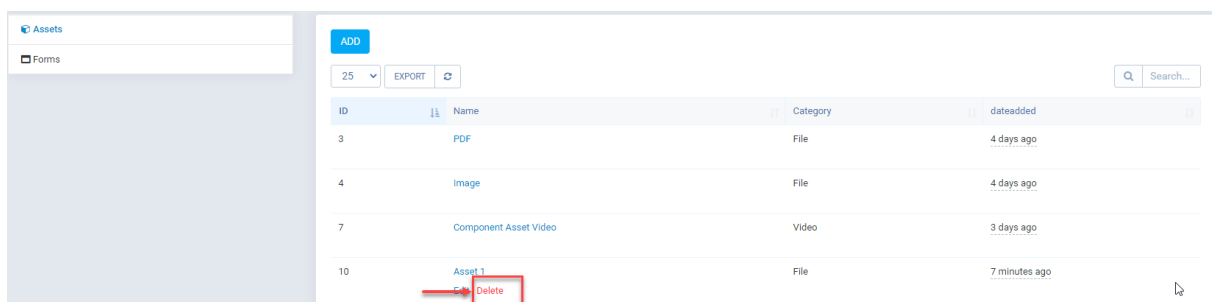
Published: ☒ Yes ☐ No

Description: [Rich text editor with menu bar: File, Edit, View, Insert, Format, Tools, Table]

SAVE

4.1.4. Delete

- Step 1: Access the Marketing Automation module -> select Components-> Assets -> Select the corresponding line you want to delete -> Select Delete function

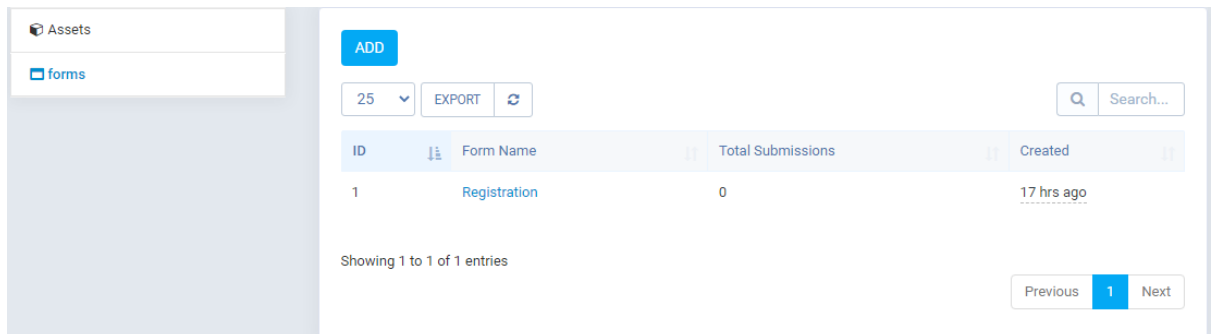


- Step 2: The system displays the Confirmation popup. Press Delete to confirm the deletion or press Cancel to cancel the deletion

4.2. Forms

Forms are used to collect user information and direct them to assets to load them, form to register for an event, or form to collect Mail Newsletter.

4.2.1. Form management



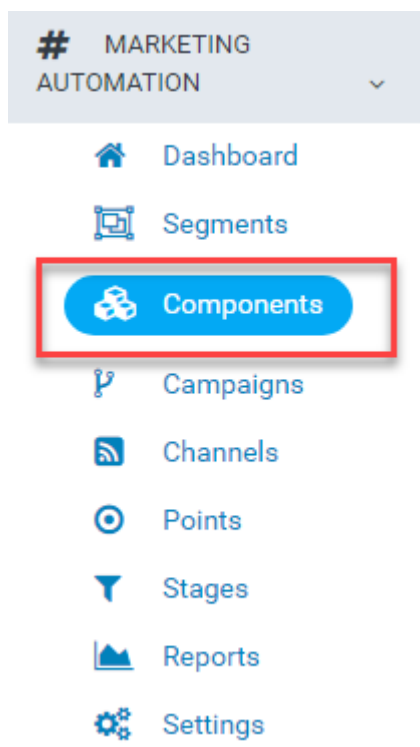
ID	Form Name	Total Submissions	Created
1	Registration	0	17 hrs ago


Total Submissions: the total number of times this form was submitted.

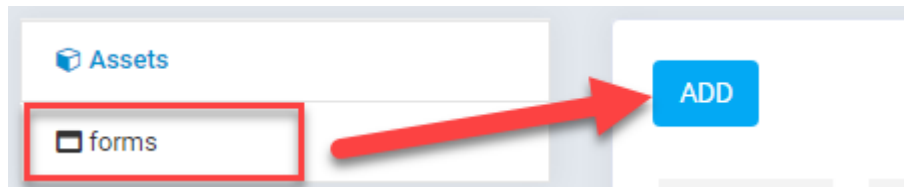
After the customer submits the form, the data will be saved on the Leads screen. At the same time, customers who submit any form will be included in the Lead list of the corresponding form

4.2.2. Add form

Step 1: Access the Marketing Automation module -> Select Components





- Step 2: Select Forms-> Click  -> the system redirects to the Add new page



- Step 3: Enter data in the fields

A screenshot of the 'Create form' configuration page. At the top, it says 'Create form first to be able to use the form builder.' The form is divided into several sections. On the left, there are fields for 'Form Name', 'Language' (set to English), 'Submit button text' (set to Submit), and a text area for 'Message to show after form is successfully submitted'. Below these are checkboxes for 'Auto mark as public' and 'Allow duplicate lead to be inserted into database?'. At the bottom left, there's a section for 'Prevent duplicate on field' with two dropdown menus and a checkbox for 'Create duplicate lead data as task and assign to responsible staff member'. On the right, there are dropdown menus for 'Source' and 'Status', both currently set to 'None selected', each with a '+' button. Below these is a 'Responsible (Assignee)' dropdown, also set to 'None selected'. Further down is a 'Notification settings' section with a checked checkbox for 'Notify when lead imported' and three radio buttons: 'Specific Staff Members' (selected), 'Staff members with roles', and 'Responsible person'. Below this is a 'Staff Members to Notify' dropdown set to 'None selected'. At the bottom right, there is a blue 'SAVE' button.

Particularly for the Source and Status fields, click  to add more options -> Enter a name, then press 

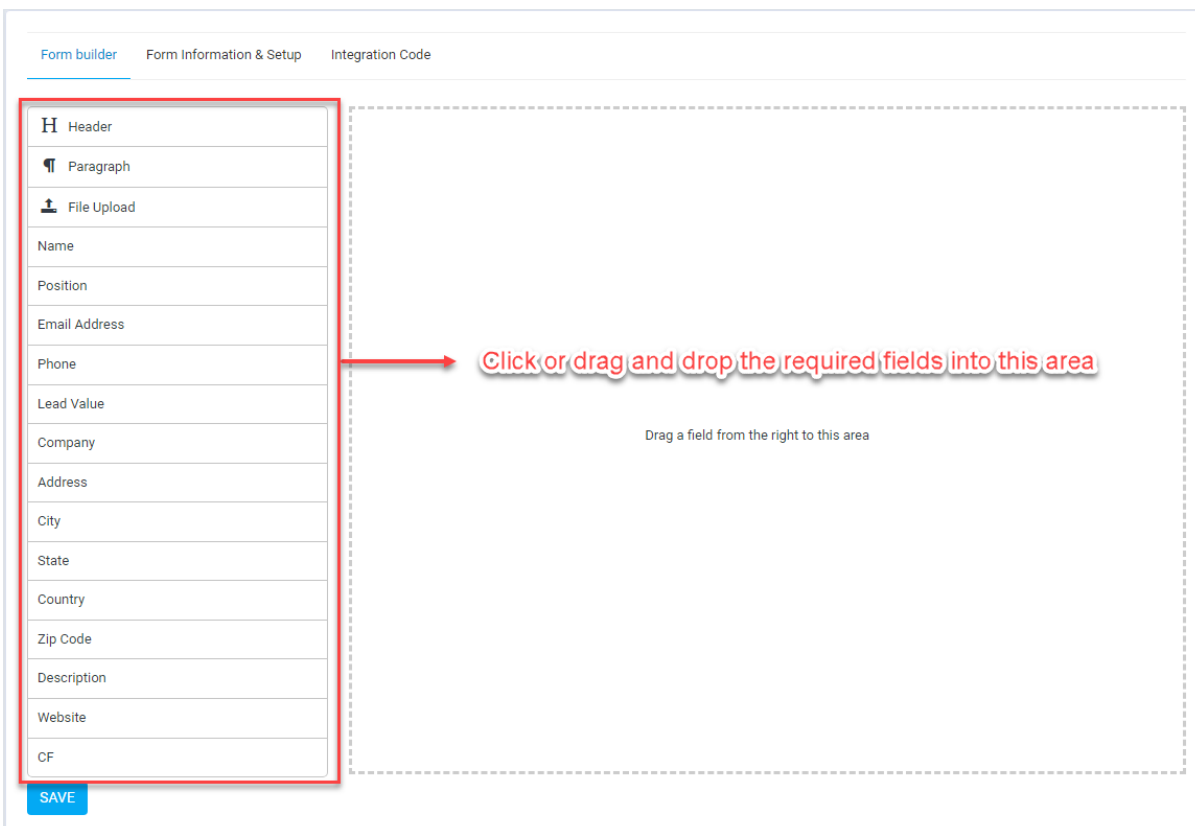
A close-up of the 'Source' and 'Status' dropdown menus. The 'Source' dropdown is empty with a blue checkmark icon on the right. The 'Status' dropdown shows 'None selected' with a dropdown arrow and a blue '+' icon on the right.

* Explain:

- Source: used to select a search engine (Google, Facebook, Bing,...). You can directly add more options
- Status:

- Responsible (Assignee): used to select the person who will be responsible for this form. Assignee data is taken from Staff. screen
- Language: used to select the language of the authentication message. It can be English or Vietnamese, or another language.
- Submit button text: used to enter text for the Submit button in this form
- Message to show after the form is successfully submitted: used to enter the content displayed after submitting the form successfully.
- Notification settings: can check or not check the option "Notify when lead imported". If you check, choose 1 of 3 cases:
 - Specific Staff Members:
 - Staff members with roles:
 - Responsible person:
- Auto mark as public
- Allow duplicate lead to be inserted into the database.
 - Prevent duplicate on field
 - + field (leave blank to track duplicates only by one field)
 - Create duplicate lead data as a task and assign it to the responsible staff member

- Step 4. Click  to save changes. The system redirects to the screen below



*** Explain:**

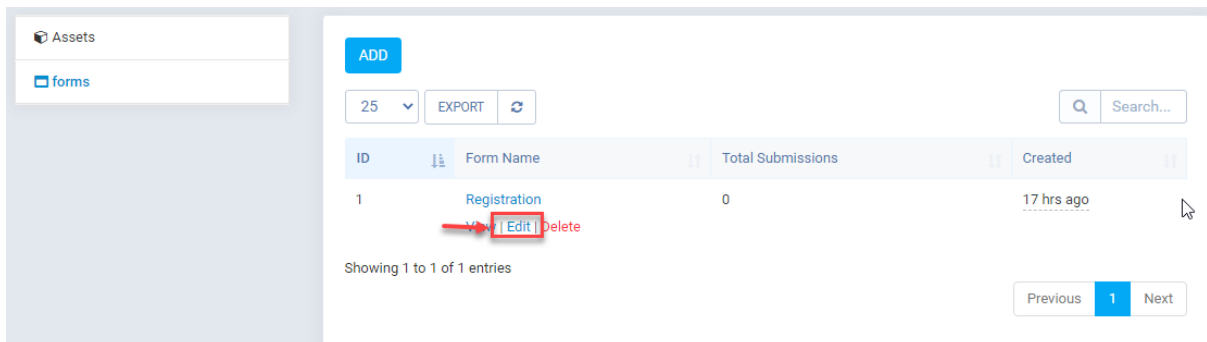
Form builder tab: used to select the data needed to create the form

Tab Form Information & Setup displays information and configuration of the form, which can be edited here.

Tab Integration Code: contains links to share for customers with the designed form template, allowing them to edit the width and height of the form to fit the website.

4.2.3. Update

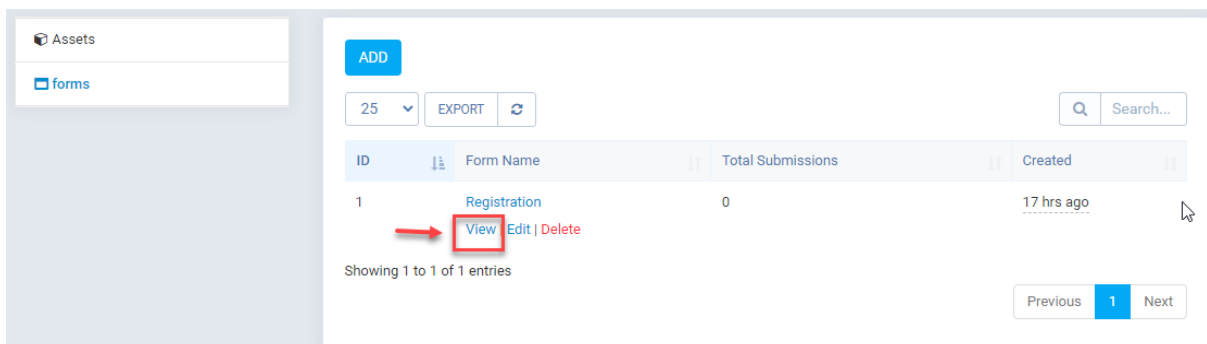
- Step 1. Select the form to edit and click Edit



- Step 2: Proceed to edit, then click Save to save the changes

4.2.4. View form

- Select menu Components -> Forms -> select a specific form and click View -> display details of the form



Header

Paragraph

File Upload

Không có tệp nào được chọn

Position

* Name

Email Address

Phone

Lead Value

Company

City

Address

State

Country

Zip Code

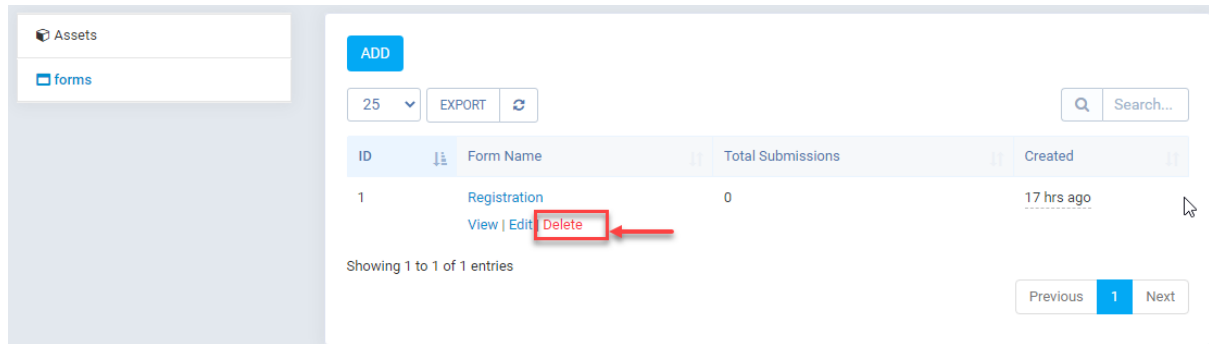
Description

Website

CF

4.2.5. Delete

- Step 1. Select the form to delete, then press Delete



- Step 2. The system will display a Confirmation message. When you are sure you want to delete the data line, select OK or select Cancel to cancel the operation.

5. Point

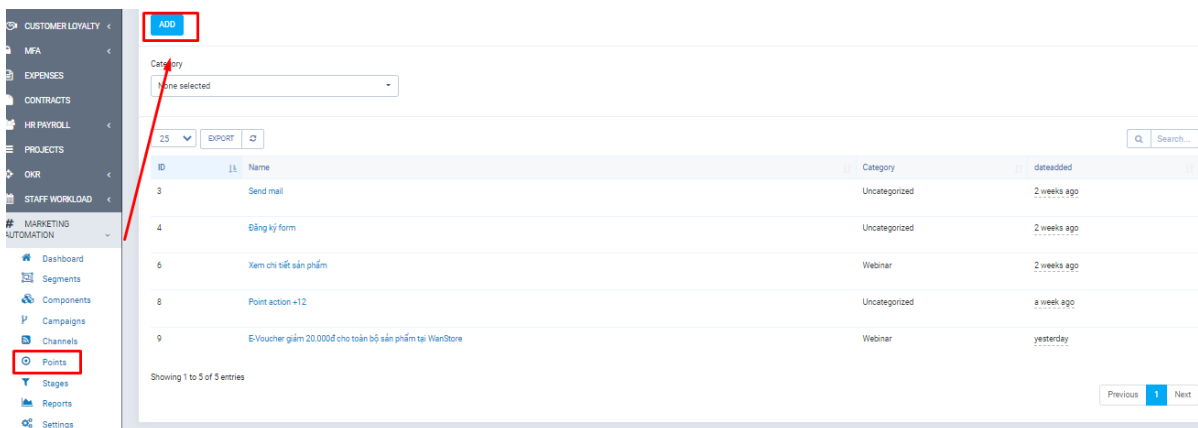
To measure customer interest in brand products, we use Points to calculate points for each contact based on actions.

The data at this screen will be used for the Campaign screen

5.1. Add points

- Step 1: Access the Marketing Automation module -> Select the Points screen -> Click

ADD



- Step 2: Enter data -> Click Save to save

Point action

Name

Category

None selected










Published

☒ Yes ☐ No

Description

File Edit View Insert Format Tools Table

Verdana 12pt A A B I



Change points(+/-)

When a contact...

None selected

BACK

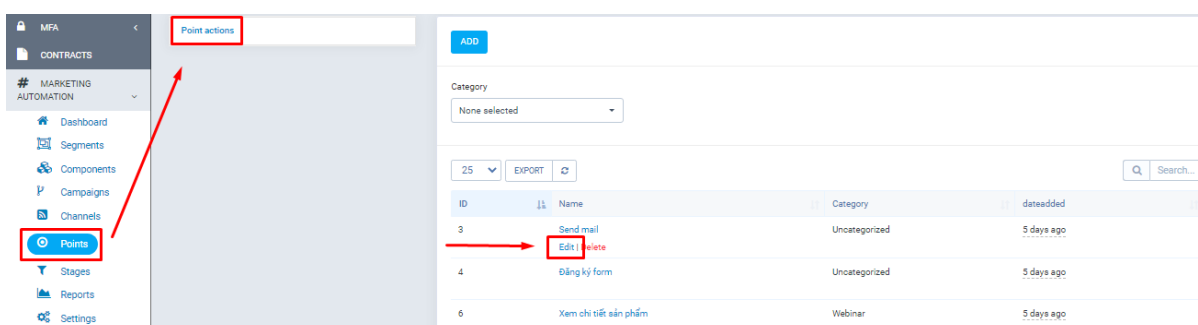
SAVE

* Explain:

- Name: enter the name of the action
- Category: data taken from category setting with the type of Point action
- Change points (+/-): select +/- the number of points, depending on the action of the contact that can be attached +/- different numbers. The actions you choose correspond to the section: When a contact
- Published: choose to publish or not
- Description: Enter a detailed description of this action.

5.2. Update

- Step 1: Select the Points screen -> Select the Point actions screen -> Select the Edit function corresponding to the Point action to edit information



- Step 2: The system will display a screen containing the information of the corresponding Point action -> Proceed to edit the information and select the Save function to save the operation or select Back to return to the previous screen.

Point action

Name

Change points(+/-)

Category

When a contact...

Published ☒ Yes ☐ No

Description

File Edit View Insert Format Tools Table

Verdana 12pt

Send mail

BACK SAVE

5.3. View

- Step 1: Select the Points menu screen -> Select the Point actions screen -> Select the View function corresponding to the Point action to view information

MARKETING AUTOMATION

Point actions

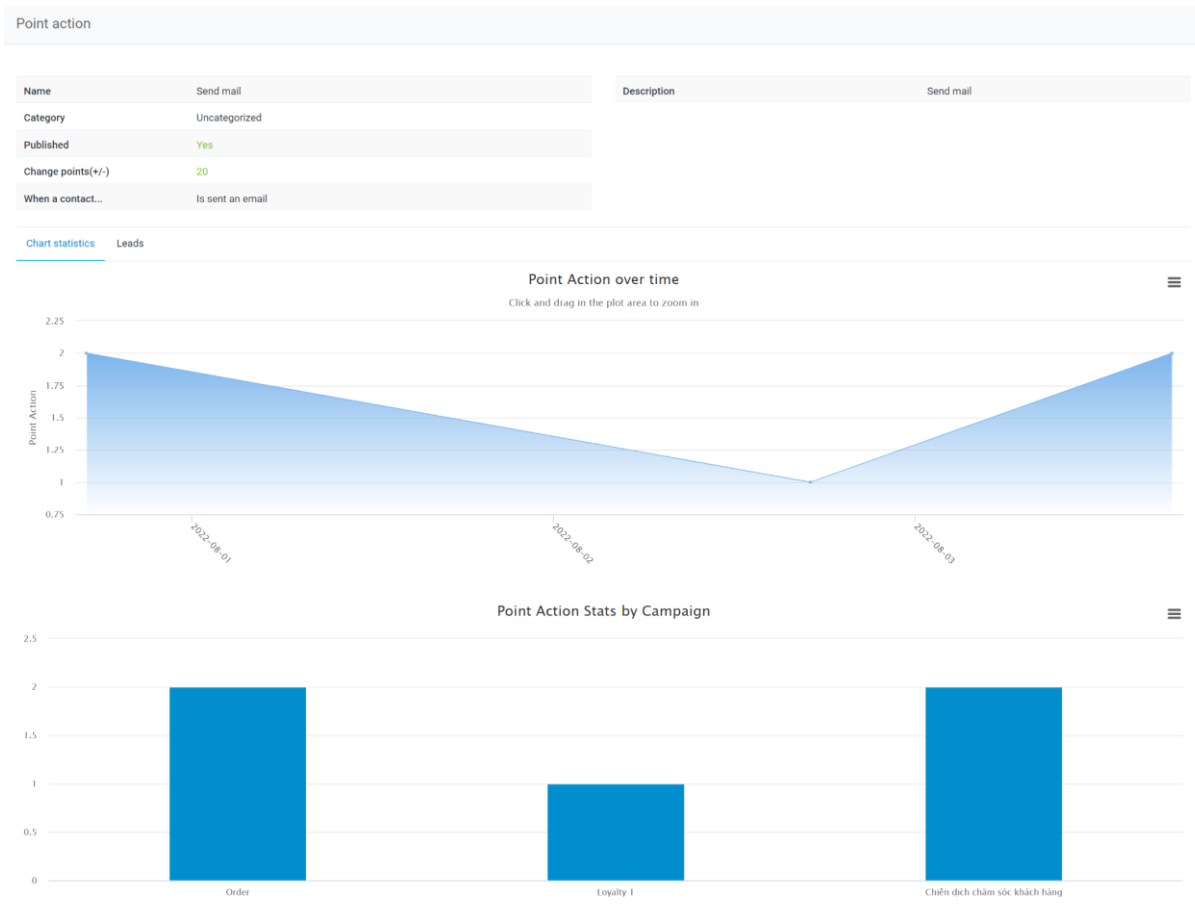
ADD

Category

25 EXPORT

ID	Name	Category	dateadded
3	Send mail	Uncategorized	a week ago
4	Đăng ký form	Uncategorized	a week ago
6	Xem chi tiết sản phẩm	Webinar	a week ago
8	Point action 1	Uncategorized	4 days ago

- Step 2: The system will display a screen containing information on the corresponding Point actions



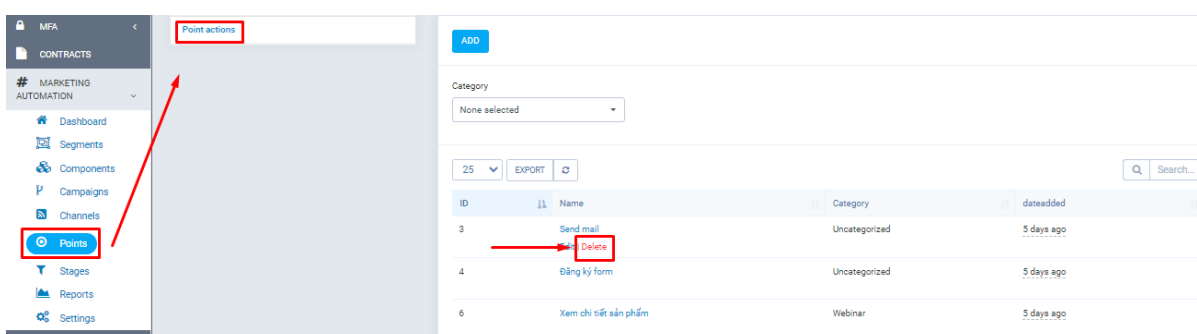
*Explain:

The Point Action over time chart will show an overview of the number of leads added by the date of the respective Point action

The Point Action Stats by Campaign chart will show the corresponding number of Point Actions of which Campaign types

5.4. Delete

- Step 1: Select the Points menu screen -> Select the Point actions screen -> Select the Delete function corresponding to the Point action to delete information



- Step 2: The system will display a confirmation message; when you are sure you want to delete the data line, select OK or select Cancel to cancel the operation.

6. Channel

There are many channels to manage and reach customers, such as Email templates, Text Message

Channels you can do in Channels include:

- Email template: done by sending Mail.
- Text messages: SMS messages

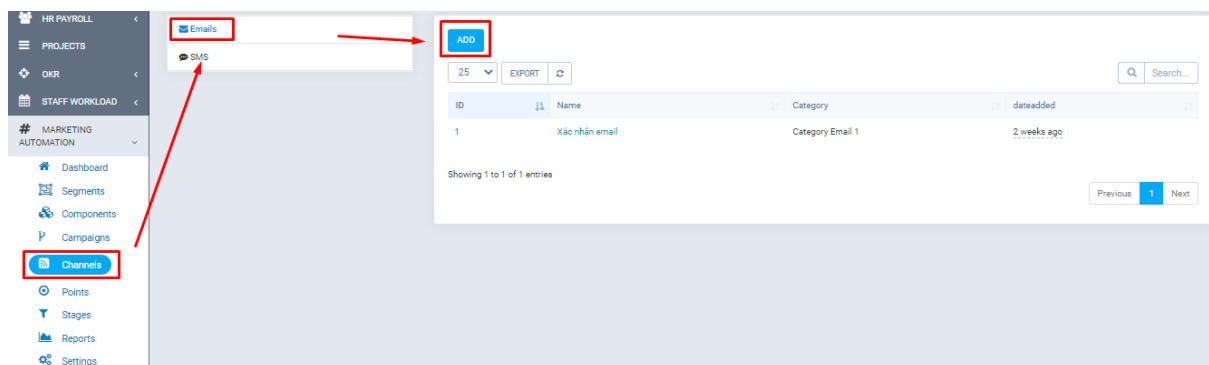
Note: You need to create and configure Channels before using them to implement any Campaign.

6.1. Emails

Emails are where you can create, edit, manage, and customize your interactions with customers.

6.2.1. Add email

- Step 1: To create a new Email, you can navigate to Channels/Email and select ADD



- Step 2: You will see the interface below

Email

Information Advanced

• Subject

• Internal name

• Category

None selected

Email Template

None selected

Published

☒ Yes ☐ No

Color

• Language

English

Description

File Edit View Insert Format Tools Table

Verdana 12pt

Verdana 12pt

BACK SAVE

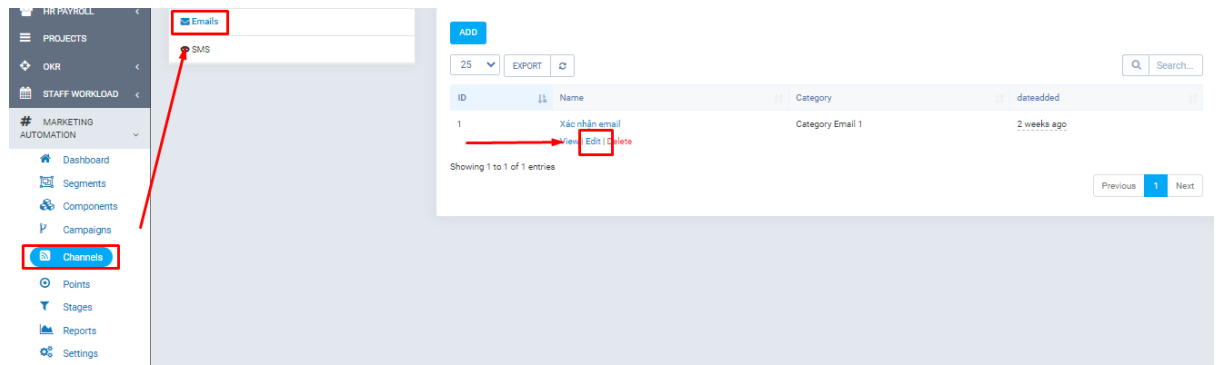
Create Email

* Explain

- Information Tab screen:
 - The subject is used to enter the subject for the email
 - The internal name is used to enter the content of the email
 - Description: Detailed description of the email
 - Language: used to select the language of the authentication message. It can be English or Vietnamese, or another language.
 - Category: data taken from category setting with type Email
 - Email Template is used to select the Email template. This field data is taken from the Email Templates screen of section 1.3
 - Color: choose a color that reminds you to sort and search later.
 - Published: choose to publish or not
- Advanced Tab Screen
 - The Attachment field is used to select attachments. This field data is taken from the Assets screen of item 4.1

6.2.2. Update

- Step 1. Go to Channel -> Email -> Select the data line to edit -> press Edit



- Step 2. Update data and press

SAVE

Email

Information Advanced

Subject
Xác nhận email

Internal name
Xác nhận email

Category
Category Email 1

Email Template
[B2C] Thank You For Your Purchase

Published
☒ Yes ☐ No

Color
#de1573

Language
English

Description

File Edit View Insert Format Tools Table

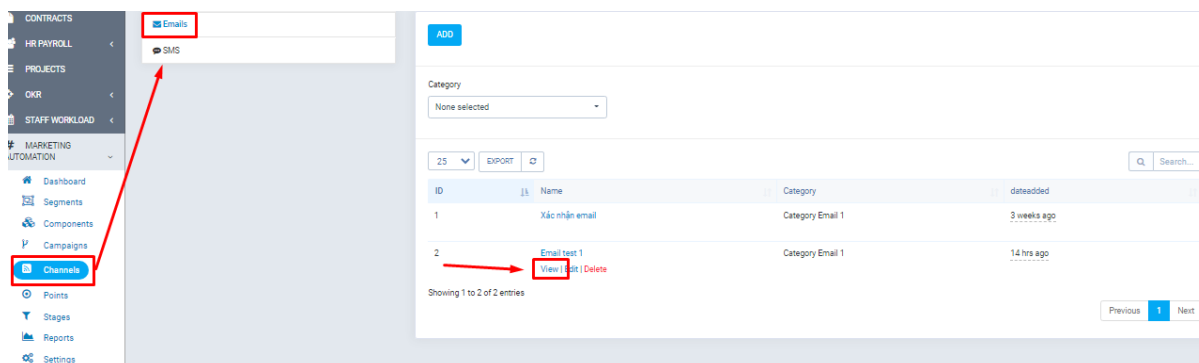
Verdana 12pt

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

BACK SAVE

6.2.3. View

- Step 1. Select menu Channels-> email -> select specific email and press View



- Step 2: The system will display a screen containing detailed information about the

corresponding email -> Click  to design the email.

Email



General Details

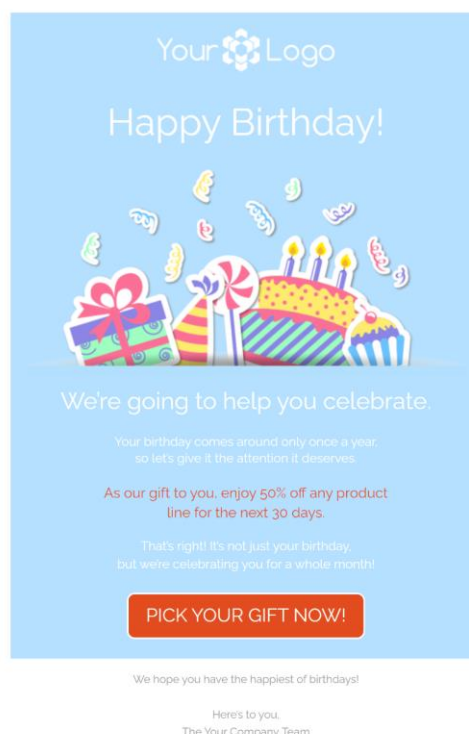
Subject	Test 1	Date Creator	2022-08-29 19:25:21
Internal name	Email test 1	Added from	GTSSolution Company
Category	Category Email 1	Description	
Email Template	Happy Birthday		
Published	Yes		
Language	english		

Advanced

From name	BCC address
From address	Attachment
Reply to address	

[Preview](#) [Statistics](#) [Leads](#)



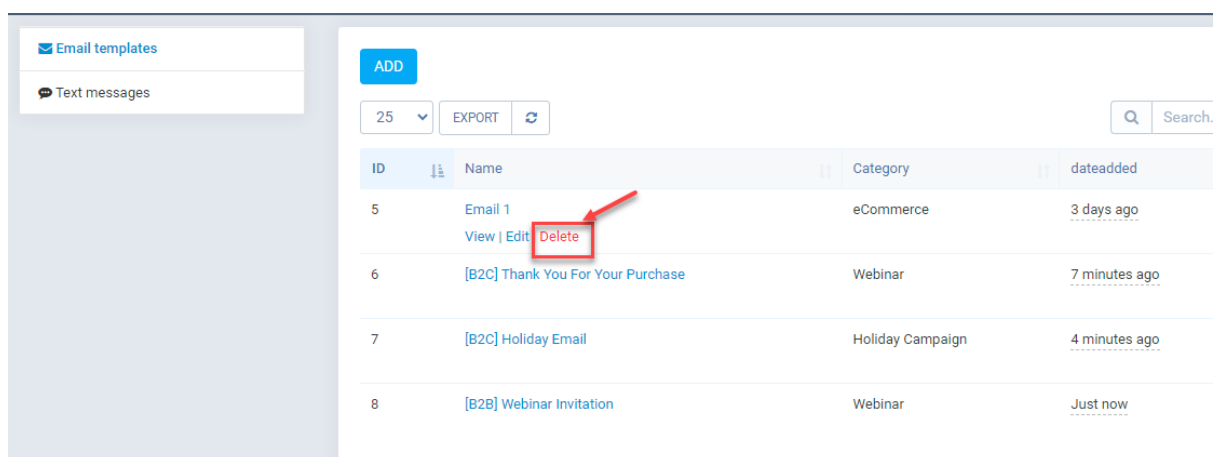
* Explanation:

- The Preview tab screen will display the designed content of the email
 - Send Example function is used to try to send the designed email to the email address to see the results
 - The Design function is used to design email templates
- Statistics tab screen
 - The Total number of leads field will display the total number of current leads belonging to the corresponding email

- The number of active campaigns field will display the total number of active campaigns with the corresponding email selected and valid (based on the start date and end date in the campaign).
 - The number of campaigns fielded will display the total number of participating campaigns that have selected the corresponding email and have passed the validity period (based on the start date and end date in the campaign).
 - The Email Stats chart will show the number of leads sent to the corresponding email, the number of leads who read the email, and the number of leads who clicked on the link in the corresponding email.
 - The Email Stats by campaign chart will show the number of leads that have been emailed; read the email, and click on the link in the corresponding email of the campaign with the email selected.
- The Leads tab screen will display a list of corresponding emailed leads

6.2.4. Delete

- Step 1. Select the email template to delete, then press Delete



- Step 2. The system will display a Confirmation message. When you are sure you want to delete the data line, select OK or select Cancel to cancel the operation.

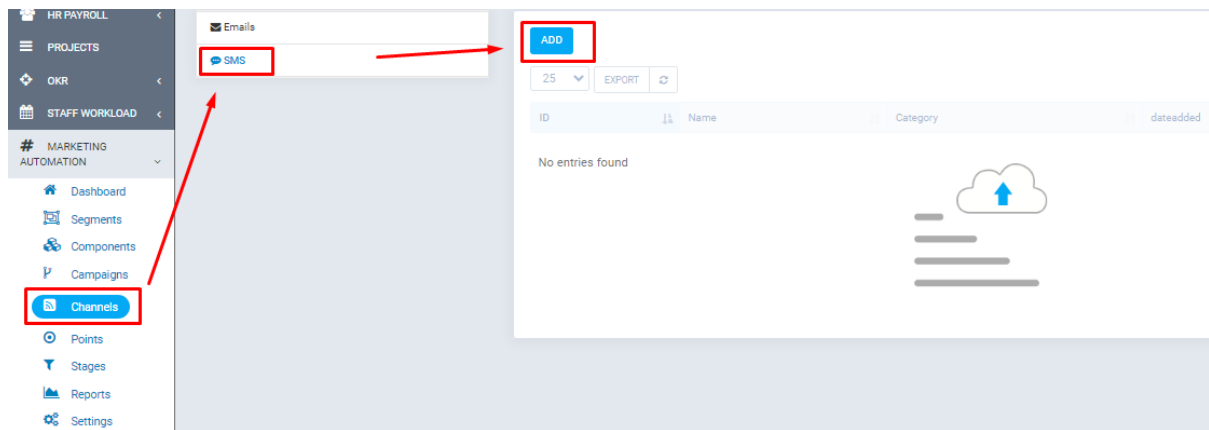
6.2. SMS

Another channel that you can refer to is SMS, i.e., sending SMS messages to a contact's phone number, for example, order confirmation or registration confirmation.

This form can only be created and edited through Campaign Builder. And before you can send SMS, you need to install Twilio Plugin in your system and use its free plan.

6.3.1. Add text message

- Step 1: To create a new SMS, you can navigate to Channels/ SMS and select ADD



- Step 2: You will see the interface below

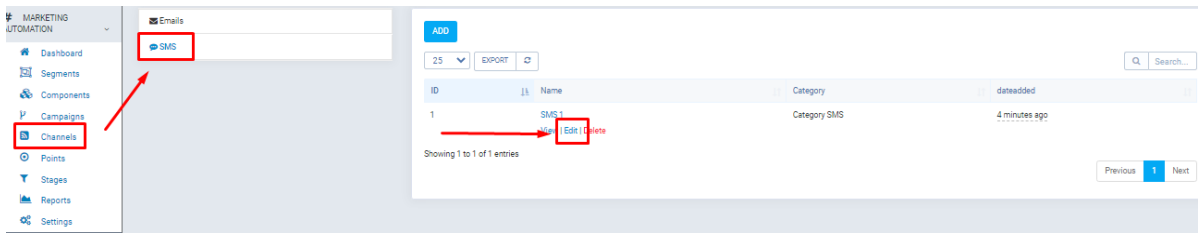
Create SMS

* Explain

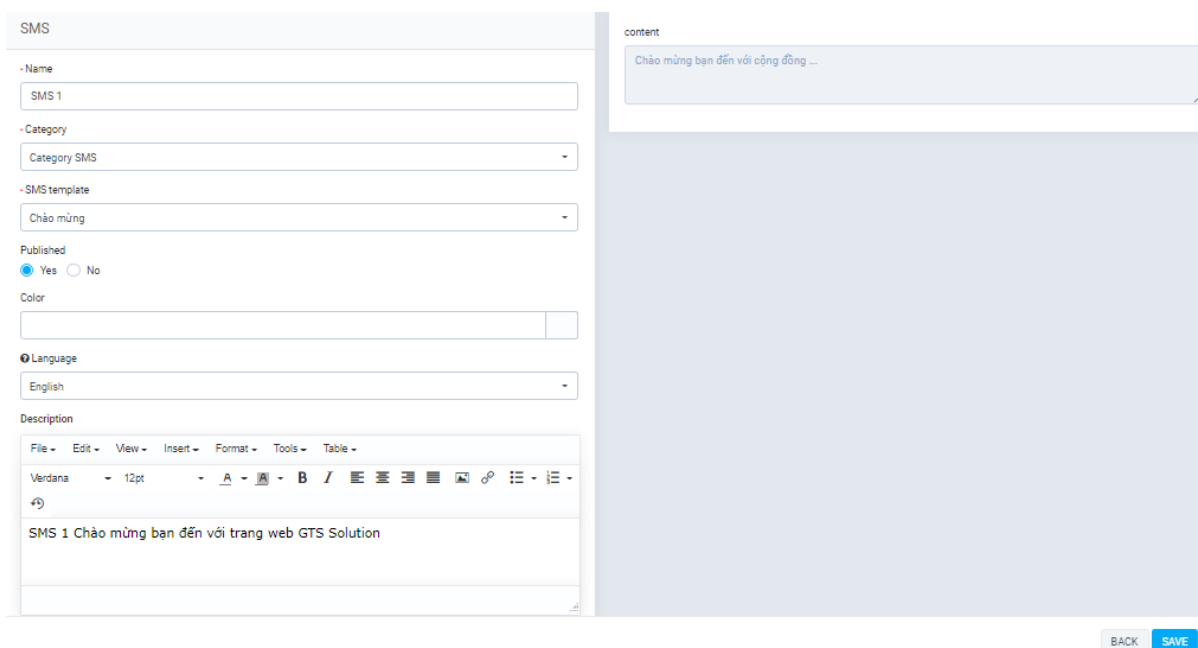
- Description: Detailed description of the text message
- Language: used to select the language of the authentication message. It can be English or Vietnamese, or another language.
- Category: data taken from category setting with the type Text message
- Published: choose to publish or not

6.3.2. Update

- Step 1: Select the Channels screen -> Select the SMS screen -> Select the Edit function corresponding to the Text messages that need to be edited

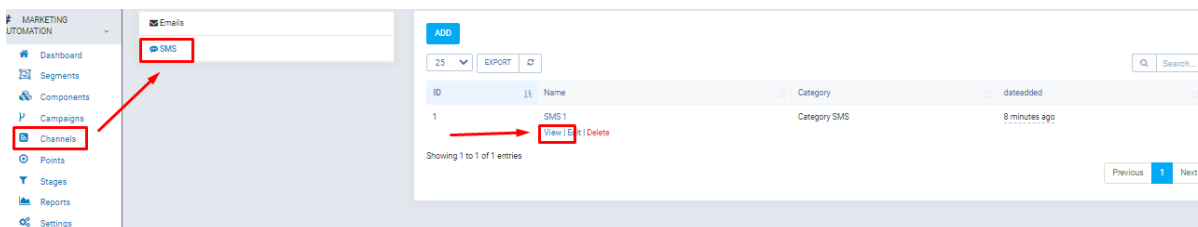


- Step 2: The system will display a screen containing the information of the corresponding Text messages -> Proceed to edit the information and select the Save function to save the operation.

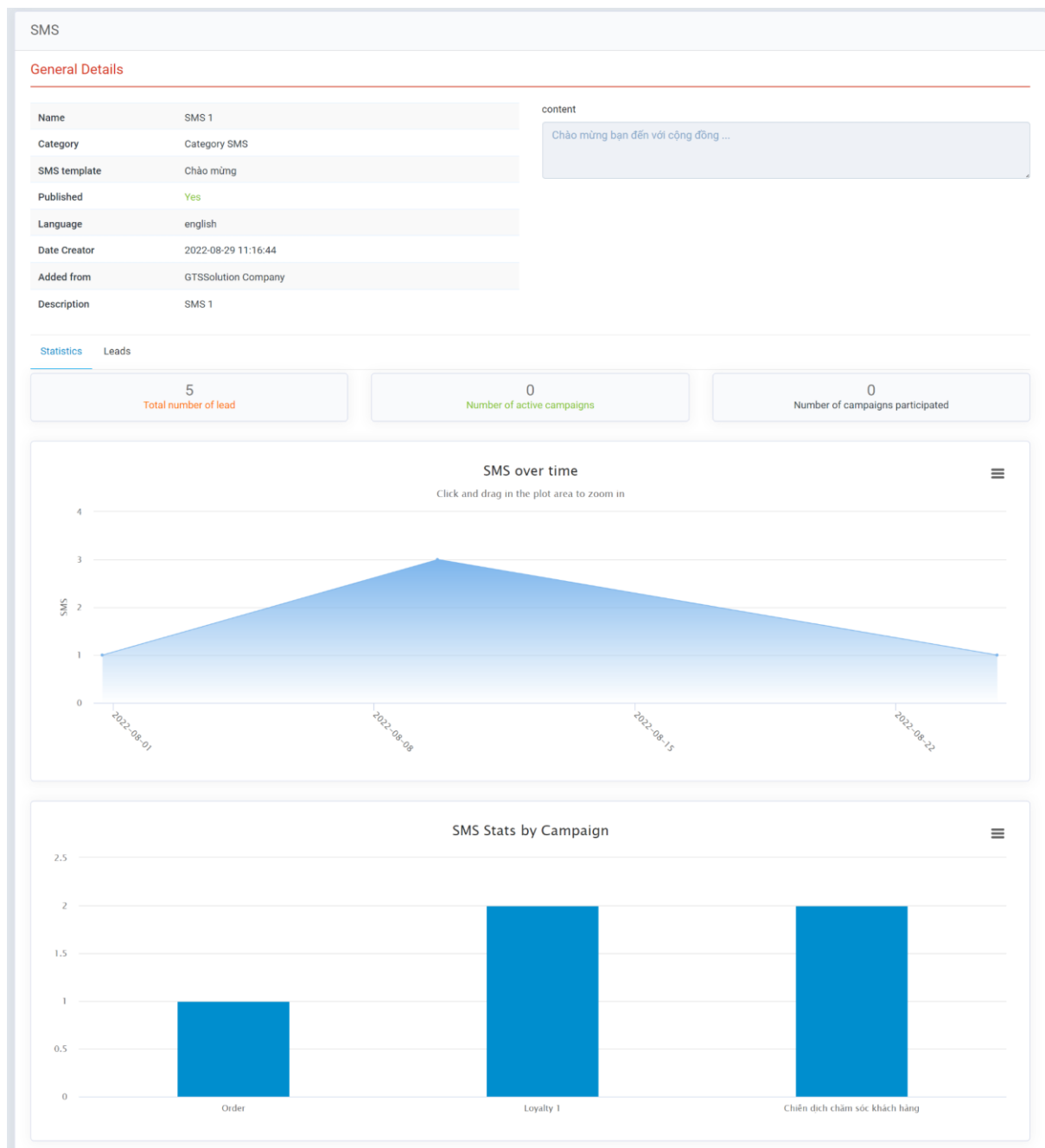


6.3.3. View

- Step 1. Select menu Channels->SMS -> Select specific SMS and press View



- Step 2: The system will display a screen containing the details of the corresponding SMS



* Explanation:

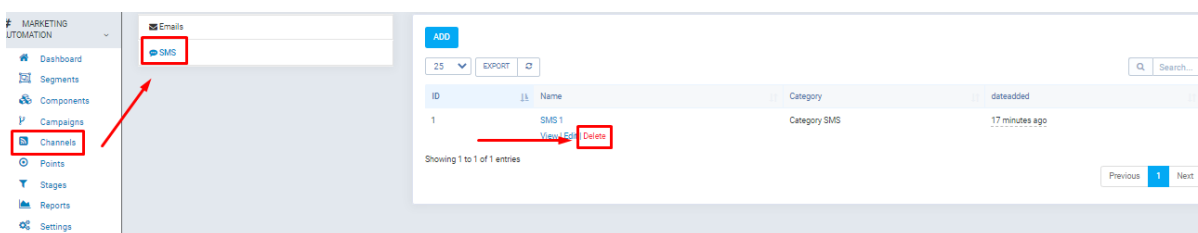
- Statistics tab screen
 - The Total number of leads field will show the total number of current leads that are SMSed accordingly
 - The number of active campaigns field will display the total number of active campaigns with the corresponding SMS selected and valid (based on the start date and end date in the campaign).
 - The number of campaigns participated field will display the total number of participating campaigns that have selected the corresponding SMS and have passed the validity period (based on the start date and end date in the campaign).

- The SMS over-time graph will show an overview of the number of leads sent by the corresponding SMS
- The SMS Status by campaign chart will show the number of SMS belonging to the corresponding campaign (this field data is based on the Campaign campaign with the corresponding SMS selected).

- The Lead tab screen will display a list of corresponding SMS-sent leads

6.3.4 Delete

- Step 1: Select Channels screen -> Select SMS screen -> Select Delete function corresponding to SMS to delete information



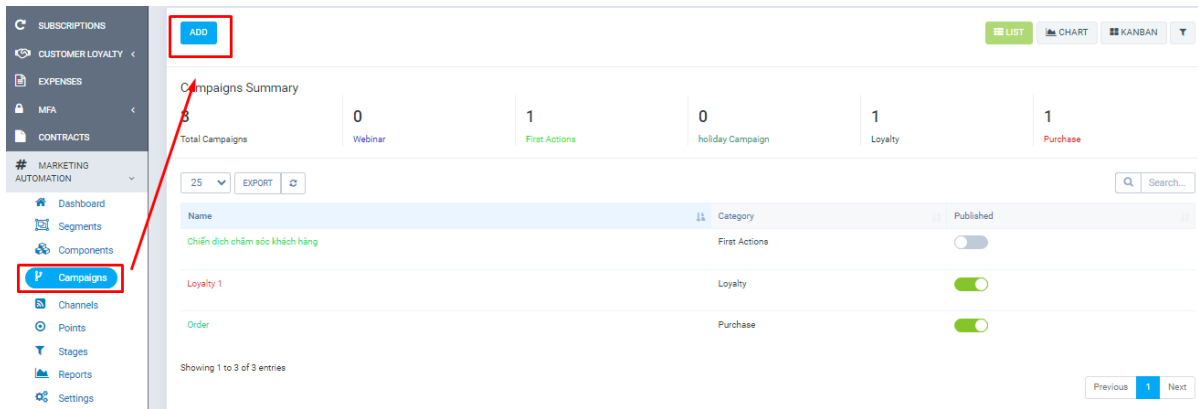
- Step 2: The system will display a confirmation message; when you are sure you want to delete the data line, select OK or select Cancel to cancel the operation.

7. Campaign

- Useful campaigns for contact management, marketing, and sales support.
- A campaign is a marketing activity that tailors the Components and Channels through which you can publish your content in a coordinated, strategically timed way to meet specific business goals. After you add your Contacts and set up the required Channels, you can create Campaigns to build meaningful relationships with your Contacts.
- One of the key benefits of the Campaign workflow is the ability to define these workflows in advance and have them automatically respond to your contact and progress. This automation reduces the amount of time required for manual Contacts operation and improves the reliability of contact nurturing.

7.1. Add campaign

- Step 1: Select the Campaigns screen -> Select the Add function included in the screen



- Step 2: The system will display the Campaign screen -> Proceed to enter the necessary values -
> Then click Save to save the action you just made and move to Step 3

*Explain:

- The Name field is used to enter the name of the corresponding campaign
- The Category field is used to select the Campaign type. This field data is taken from the Category screen in Setting - set in section 1.2 and only gets Categories of type Campaign
- The Color field is used to select a recall color for later sorting and searching
- Published field: If Yes is selected, the successfully created campaign will take effect. Otherwise, if you choose No, the generated campaign will have no effect
- The Start date and End date fields are used to select the start and end date of the campaign
- The Description field is used to enter a description for the campaign
- Step 3: After entering the necessary data and selecting Save, the system will display a screen General Details -> Draw Workflow for the corresponding campaign through the Builder function

Campaign

General Details

Name	Sign - up Campaign	Date Creator	2022-08-23 08:35:48
Category	Webinar	Added from	GTSSolution Company
Published	Yes	Description	
Start date	2022-08-23		
End Date	2022-08-27		

Workflow Actions Statistics Leads

Builder

- Step 4: The system will display the Workflow builder screen -> Proceed to draw the Flow -> Then select Save to save the action just done or select Clear to delete the Workflow

Workflow builder

Flow start
Condition
Action
Filter
SMS
Email

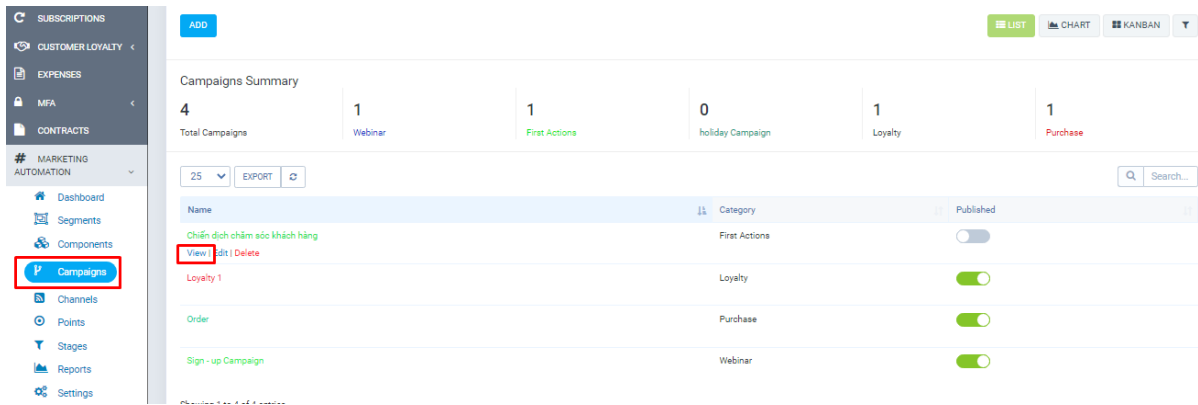
Clear Save

***Note:**

- Drag the action fields to the design area, then release the mouse
- Select Ctrl and scroll function to zoom in or zoom out

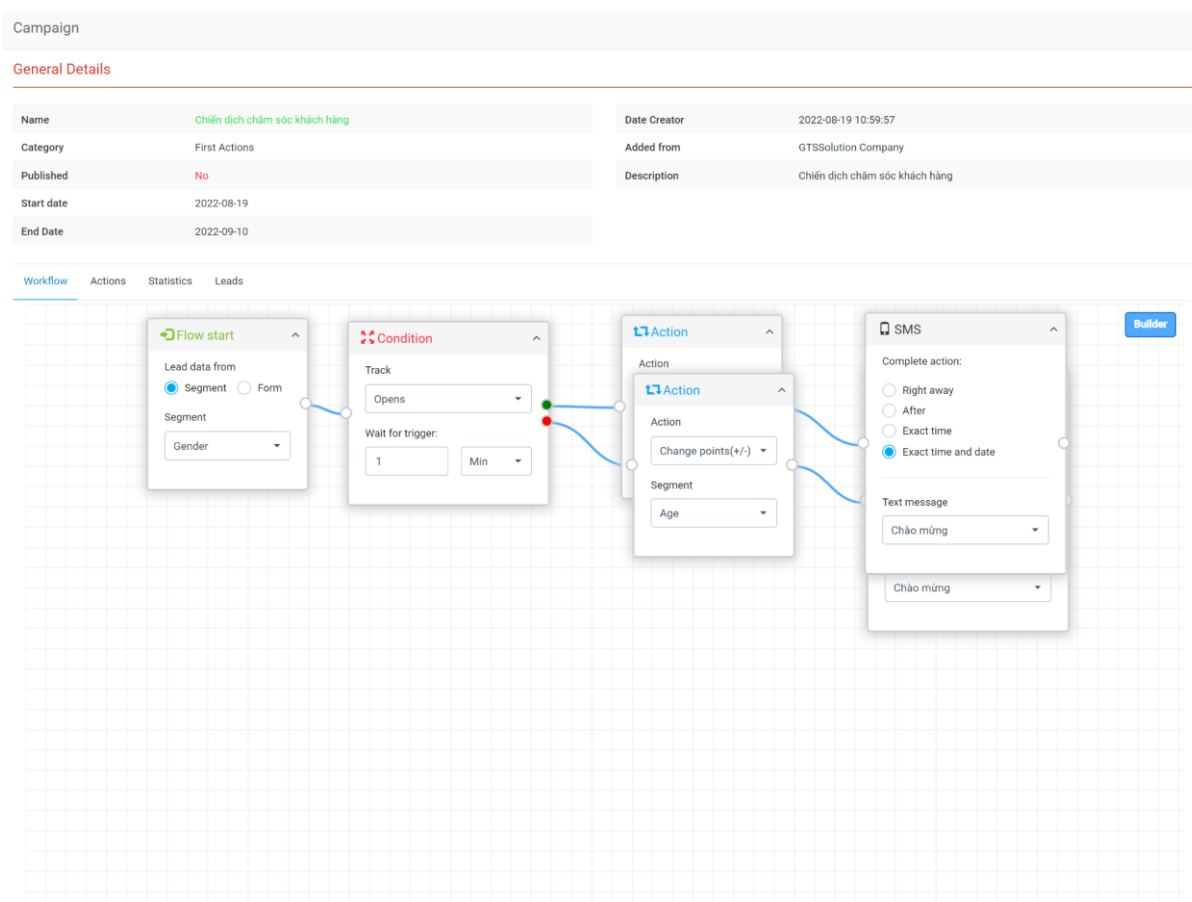
7.2. View

- Step 1: At the Campaigns screen -> Select the View function corresponding to the campaign to see information



- Step 2: The system will display a screen containing the corresponding information of the selected campaign

* Builder function for editing the created workflow design



* Explanation:

- The Workflow tab screen will display the previously designed Workflow
- The Action screen will show the history of how many times the action in the Workflow was run
- Statistics screen

- The Email Stats chart will show the number of leads sent to the corresponding email, the number of leads who read the email, and the number of leads who clicked on the link in the corresponding email.
- The Point Action over time chart will show the number of leads applying Point Action in the campaign being run
- The SMS over-time chart will show the number of leads sent by SMS in the campaign being run
- The Leads screen will display a list of the leads belonging to the corresponding Campaign

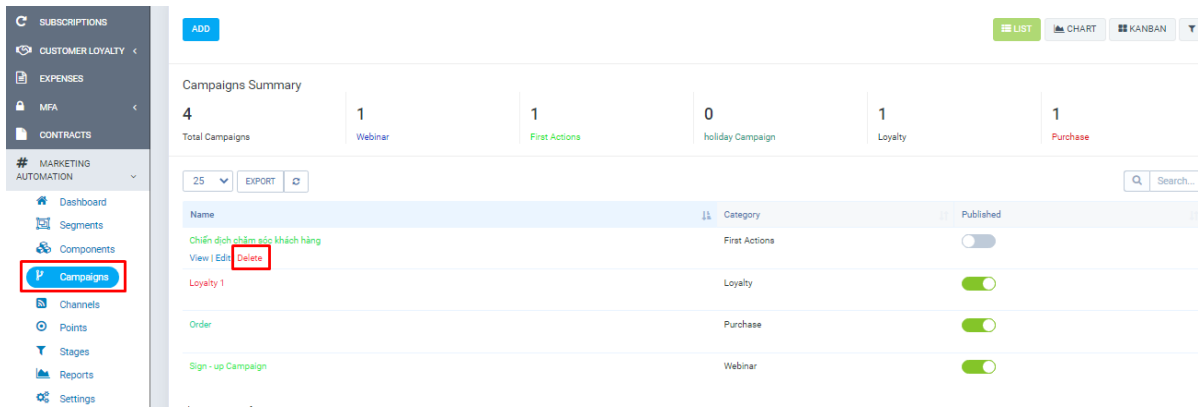
7.3. Update

- Step 1: At the Campaigns screen -> Select the Edit function corresponding to the campaign that needs editing information

- Step 2: The system will display a screen containing the information of the corresponding campaign -> Edit the information and select the Save function to save the operation.

7.4. Delete

- Step 1: At the Campaigns screen -> Select the Delete function corresponding to the campaign to delete information

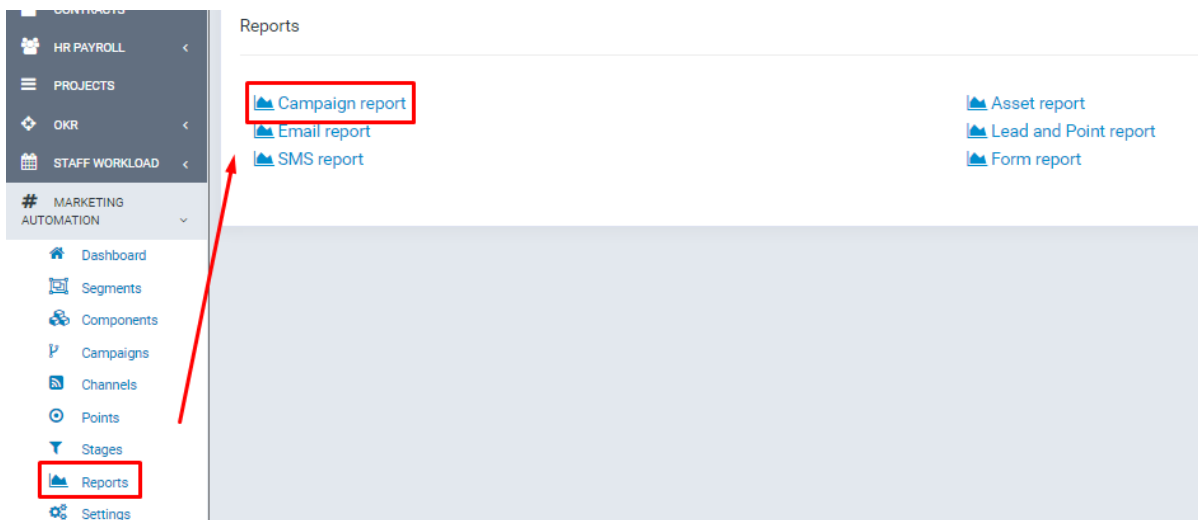


- Step 2: The system will display a confirmation message; when you are sure you want to delete the data line, select OK or select Cancel to cancel the operation.

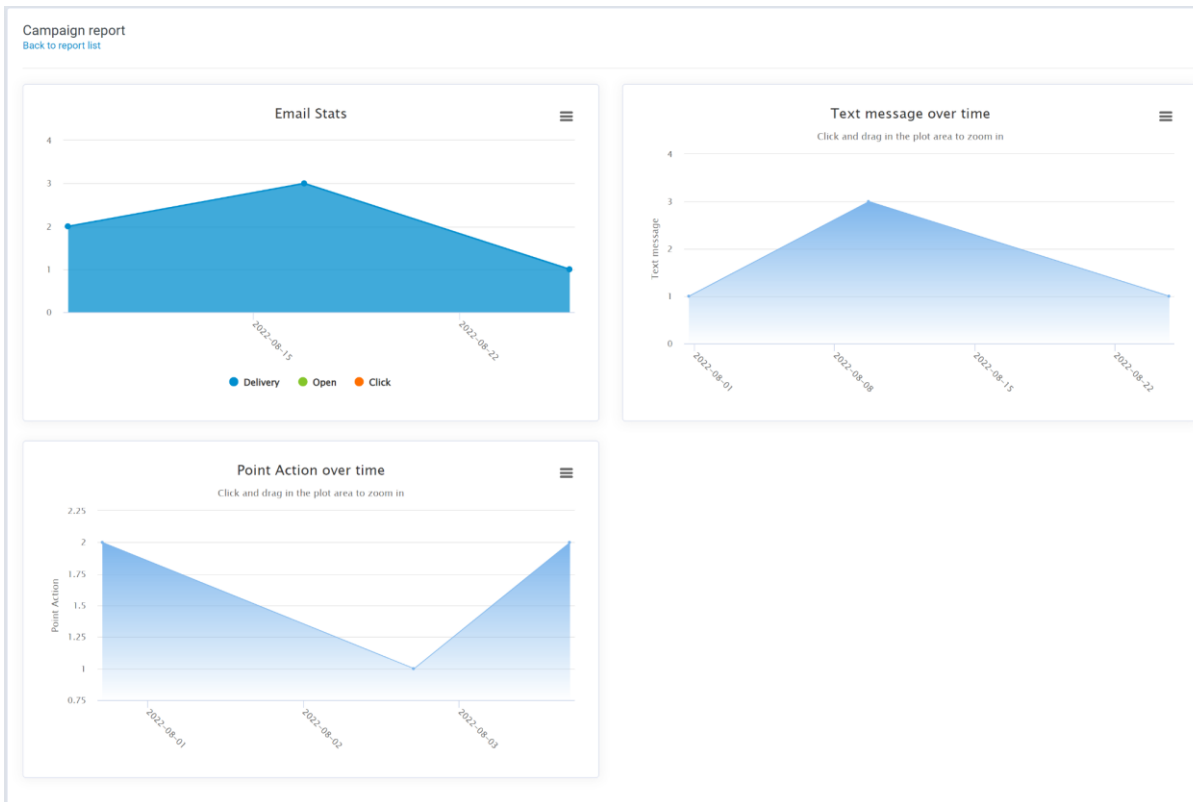
8. Report

8.1. Campaign report

- Step 1: Select the Reports menu screen -> Select Campaign report



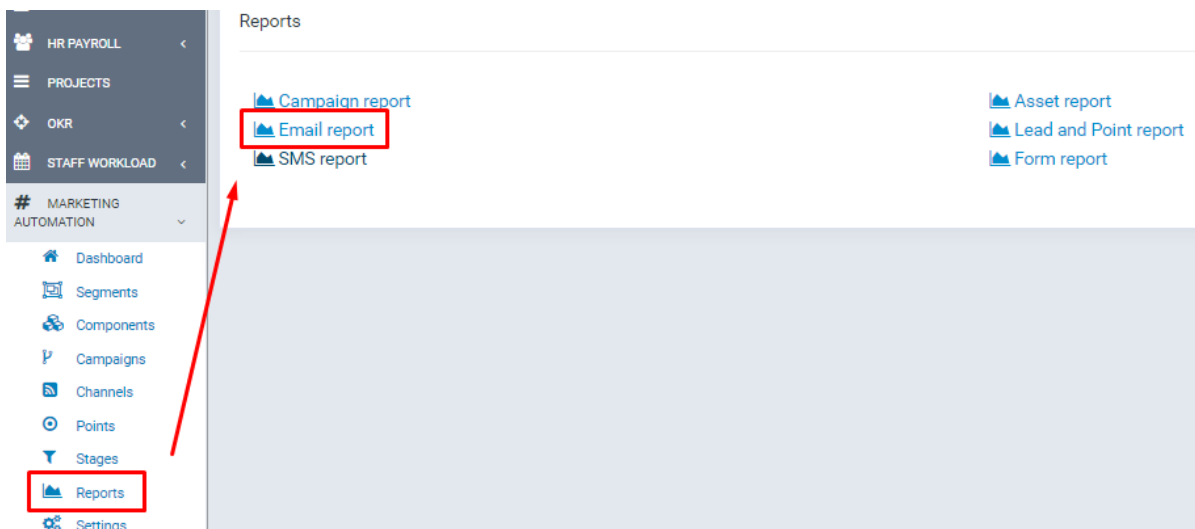
- Step 2: The system will display the Campaign report screen containing the corresponding charts



8.2. Email Report

The Email report will display the list and statistics of the number of emails sent to the system's leads by day when running the campaign. The report will report according to the action of sending, opening, and clicking on the link attached to the email

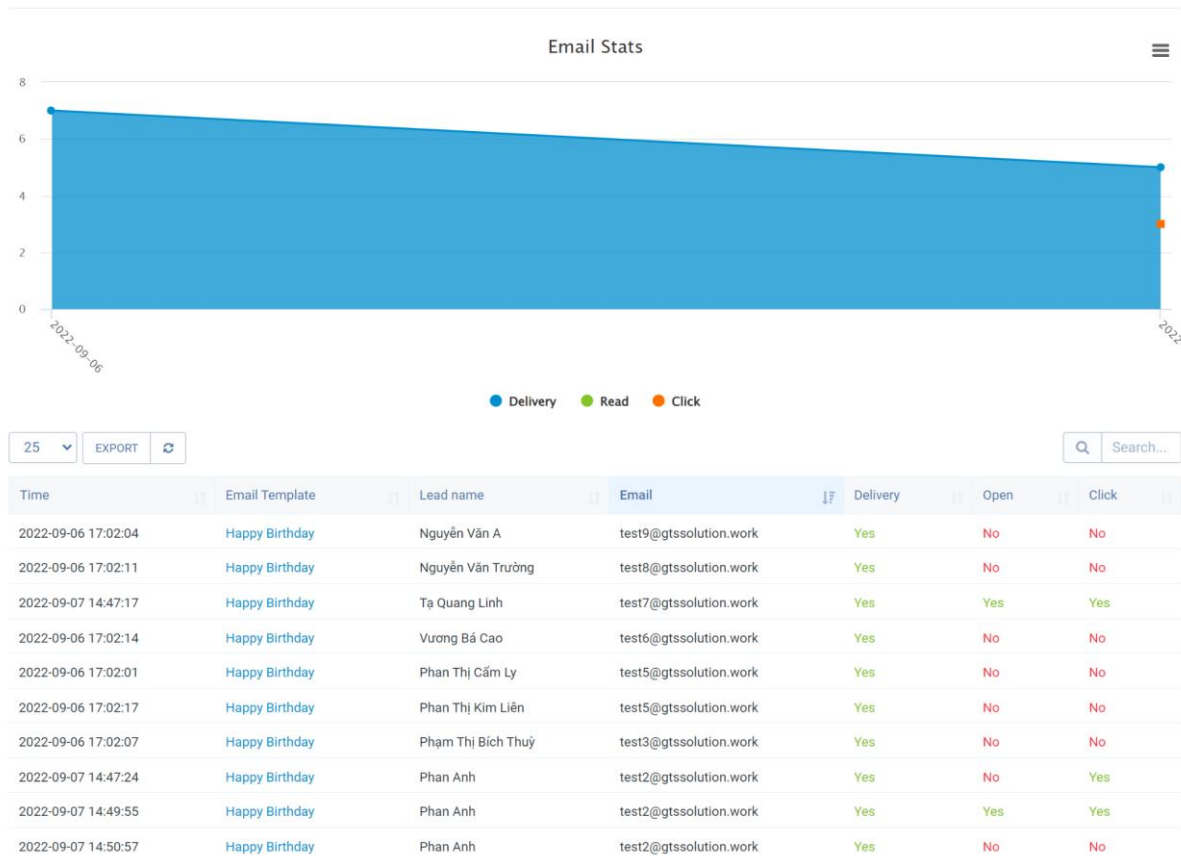
- Step 1: Select the menu screen Reports -> Select Email Report



- Step 2: The system will display the Email report screen containing the corresponding chart

Email report

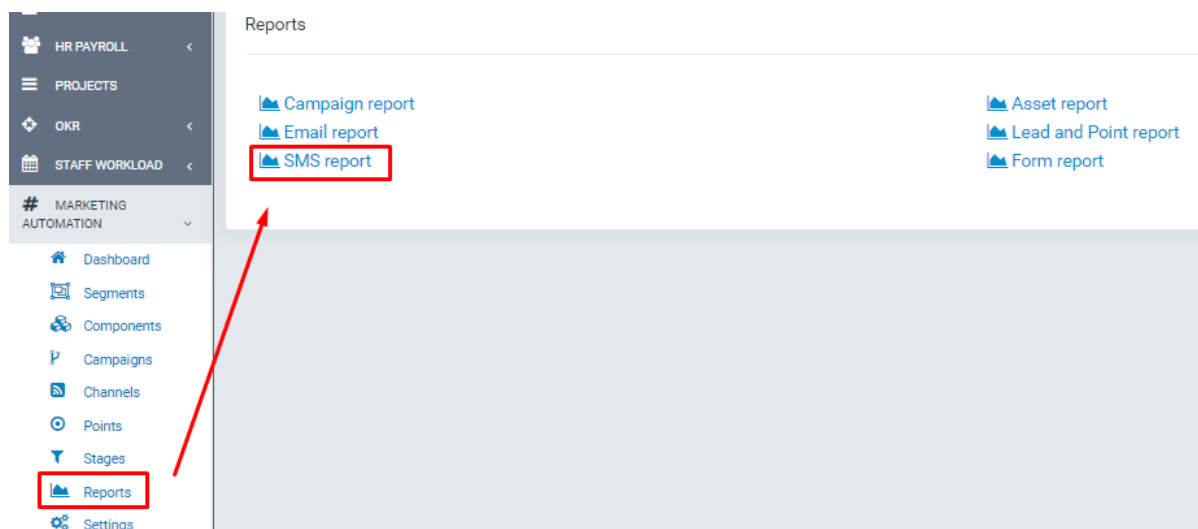
[Back to report list](#)



8.3. SMS report

The SMS report will display the list and statistics of the number of SMS sent to the system's lead by day when running the Campaign

- Step 1: Select menu screen Reports -> Select SMS report



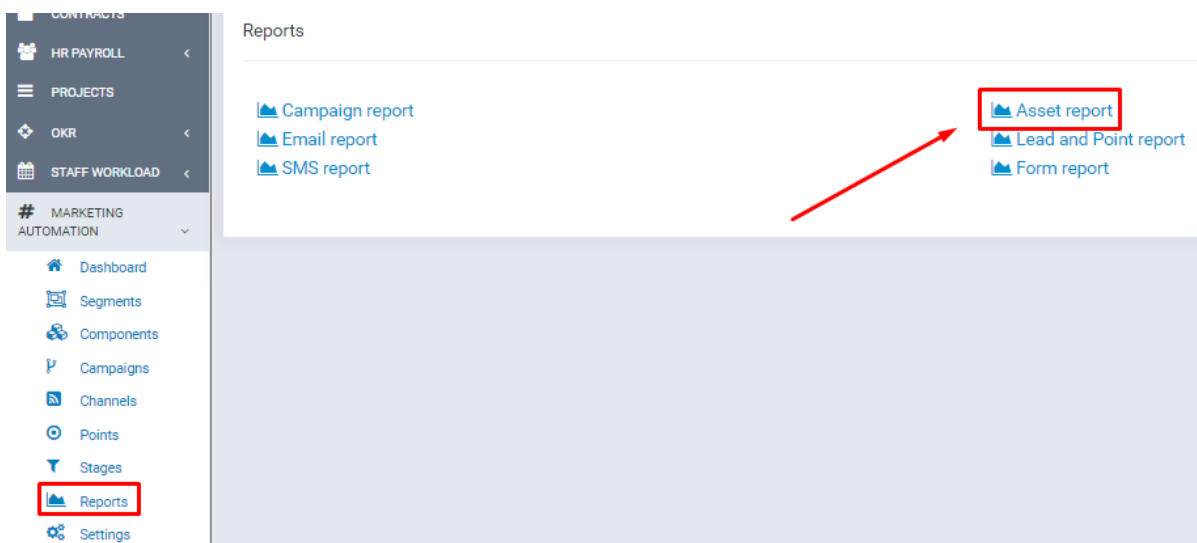
- Step 2: The system will display the EMS report screen containing the corresponding chart



8.4. Asset Report

An asset report is used to display the statistics of asset downloads over time

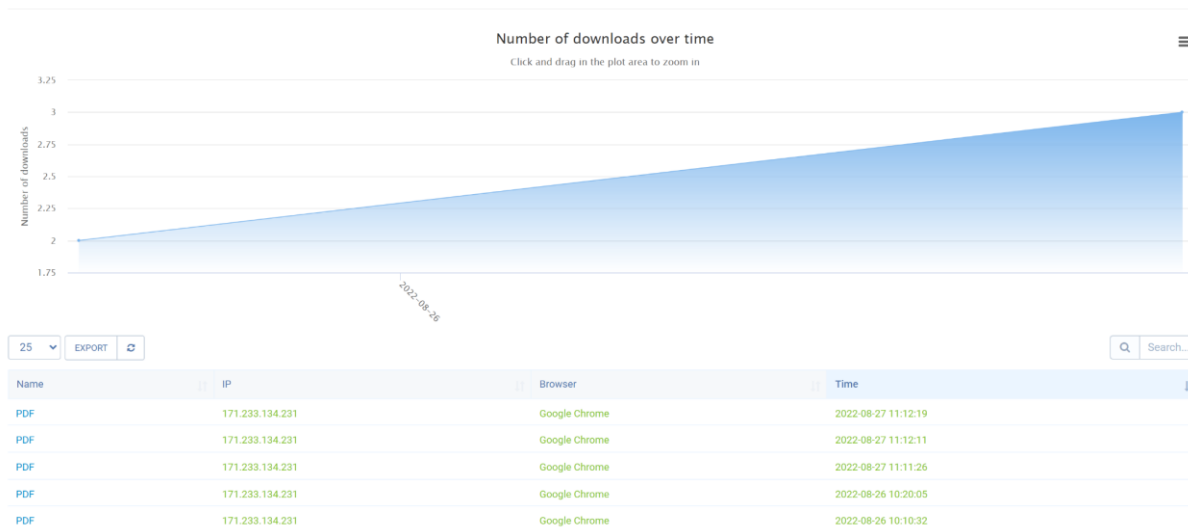
- Step 1: Select the Reports menu screen -> Select Asset report



- Step 2: The system will display the Asset report screen containing the corresponding chart

Asset report

[Back to report list](#)



* Explanation:

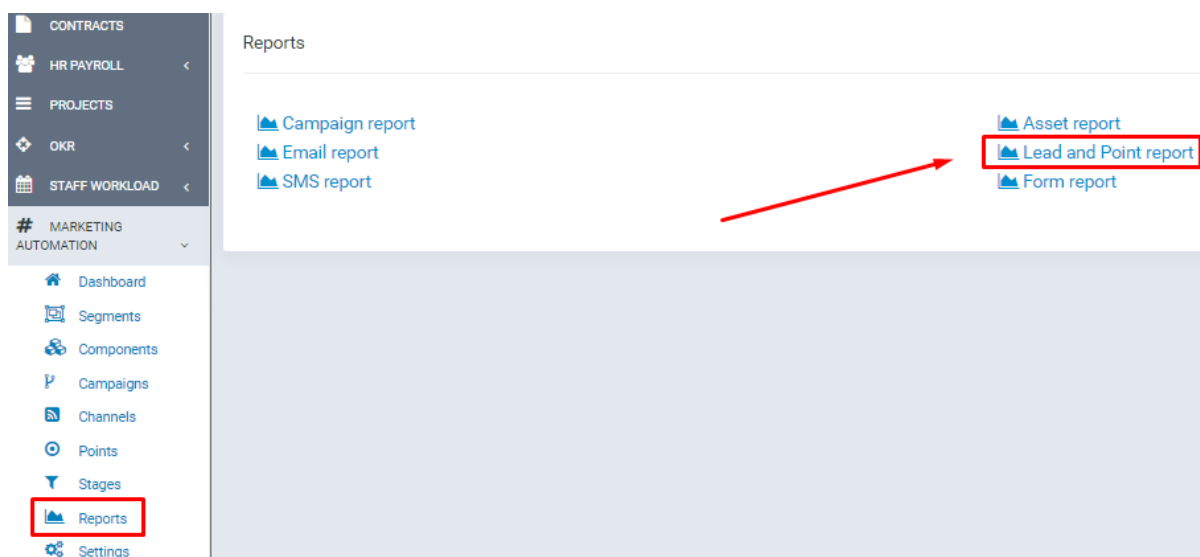
- The number of downloads over time graph will show the number of downloads of Assets. Data is aggregated from the Assets screen of the Components through downloading files using the copy function
- The list will display detailed information about file download history with file name, IP address, browser, and time.

8.5. Lead and point report

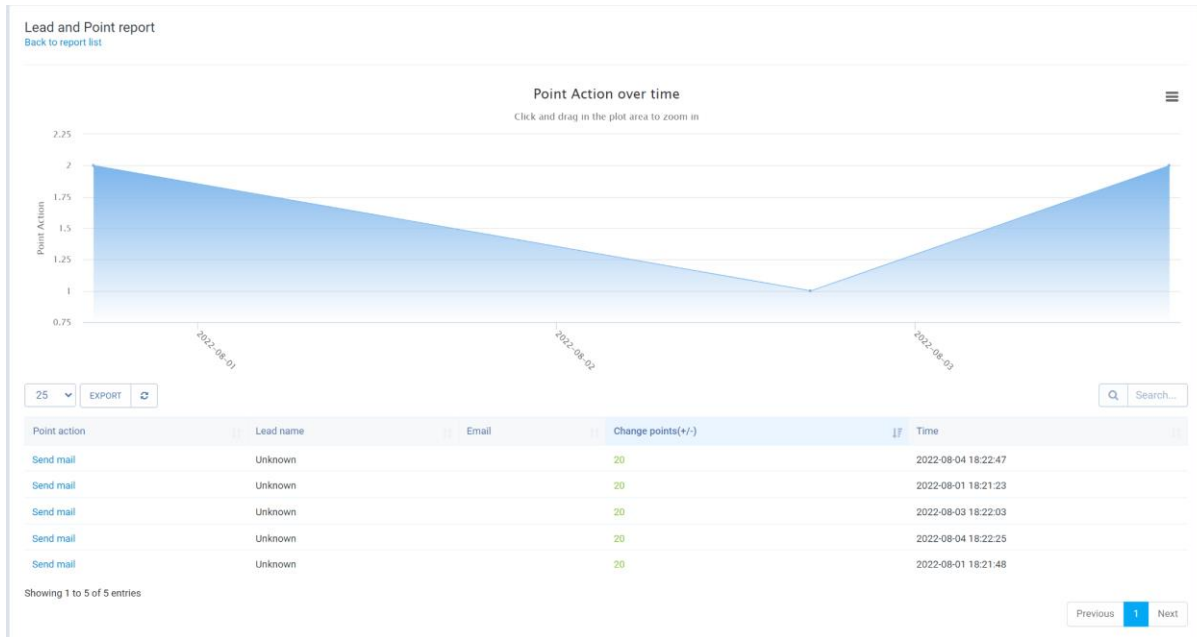
Lead and point report is used to display a list and statistics of data related to the action of adding and subtracting points for leads based on the Point data selection Campaign.

* Note: The report will not calculate the number of change points for the Change points field (+/-) but only the Point action field.

- Step 1: Select the Reports menu screen -> Select Lead and point report



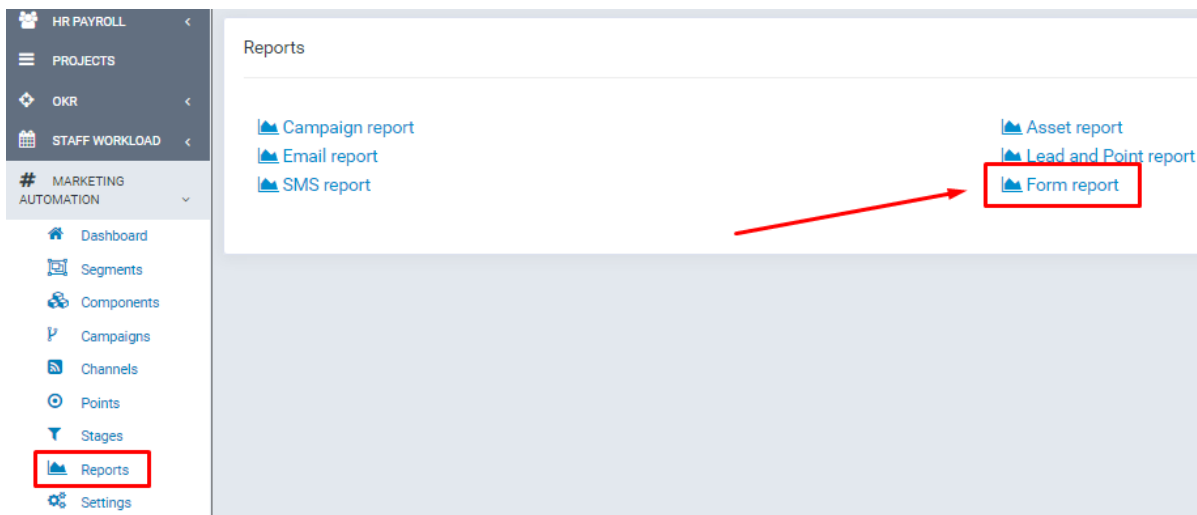
- Step 2: The system will display the Lead and Point report screen containing the corresponding chart



8.6. Form report

The Form report will display the list and statistics of the number of Leads added from the created form of the Form screen in the Component.

- Step 1: Select the Reports menu screen -> Select Form report



- Step 2: The system will display the Form report screen containing the corresponding chart

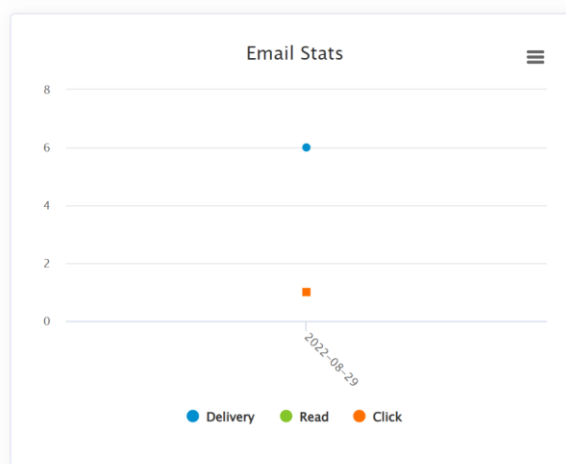
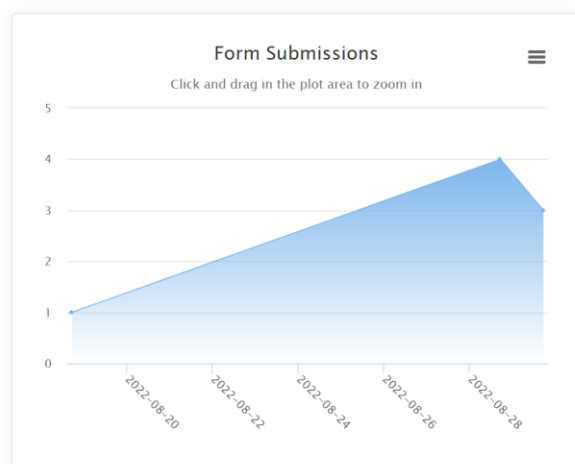
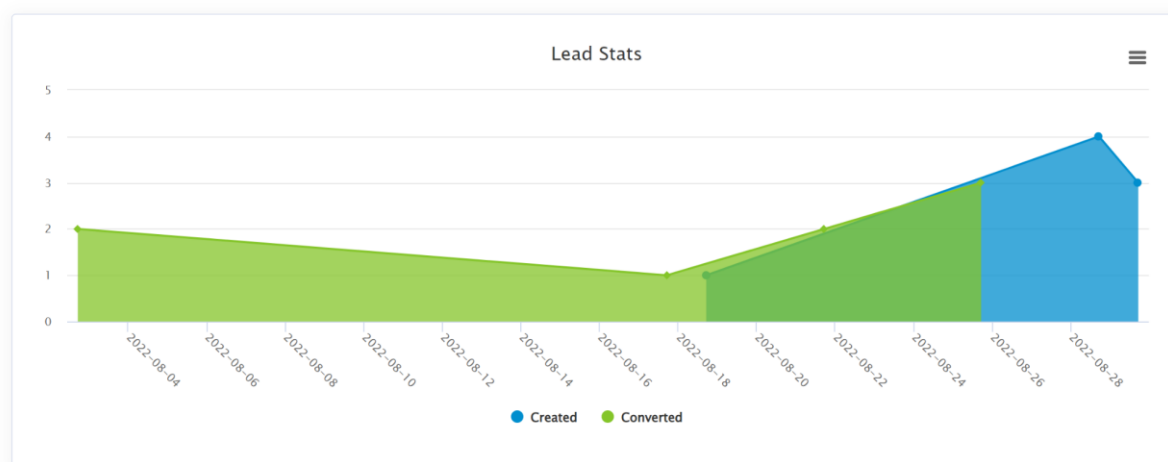


9. Dashboard

- ❖ Lead Stats chart will show the lead generation date and lead to the customer conversion date
- ❖ The Form Submissions chart will list the leads added from the form
- ❖ The Email Stats chart will show the number of leads that were emailed, the number of leads that read the email, and the number of leads that clicked on the link contained in the corresponding email.

Dashboard

LAST 30 DAYS



Created: 2022-09-22
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 Email: sales@gtssolution.vn

Once again, thank you so much for purchasing this plugin. We will be glad to help you if you have any questions relating to this plugin.