MAUTIC

Mautic Documentation

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Introduction

Mautic is an open marketing automation software platform that provides you with levels of integration and audience intelligence, enabling you to make more meaningful customer connections. With Mautic, you can create various email campaigns such as an on-boarding campaign, a drip campaign, a re-engagement email campaign and etc.

Getting Started: Getting Familiar with Mautic

Mautic Dashboard

When you open Mautic, you will see the following information presented to you in a dashboard and features a bell for notifications and a magnifying glass to search. The dashboard gives you an overview of the Contracts Created and the dates.

Below that you will have the Contact Map where you will see the location of the clientele. The darker the color the higher the amount of clients in that region. Next to the contact map there is the Top Lists, this shows the segments with the most contacts in it.



Next is Visits this shows the amount of total visits on pages in a certain amount of time. Below is then the Emails sent/opened which shows the amount of emails sent during a period of time.

Below that there is the unique/returning visitors which shows you the amount to visits in a pie chart. Then there is ignored/opened emails which gives an overview of what emails failed, amount of read and ignored emails. Then there is identified vs anonymous leads which gives an overview of the leads and lastly there is dwell times which tells how long people are spending on emails. Lastly, there's an overview of recent activity and the upcoming emails.



Editing the dashboard

You can change the time period above the dashboard if you want to see data from a different time. You can also click the downward triangle to add more widgets, export and import.

Editing Widgets

To edit the sections in the dashboard, each element features 3 dots you can click on. There you can rename the widget, its type, width/height and segment filters.

Add widget		×
Name	Туре *	
	Select	•
Width	Height	
Choose one	Choose one	

Calendar

The calendar in Mautic gives an overview of the activities that will happen within the month. When you are publishing an email campaign, the triggers will then be shown on the calendar and the time they have been triggered. So this means, that if you have a campaign with an action such as 'send email' then this will be also shown on the calendar when that action is triggered.



Contacts

This is where you have an overview of all your contacts. You can search for contacts by their names or with a more advanced method which you can see by clicking the question mark next to the search bar.

Con	ontacts								lew 👻
Image: Pilter Q									
	~	Name		Email	Location	Stage	Points	Last active 🗄	ID
	~	m.balabash@interne	etdevels.com	m.balabash@internetdevels.com	German, L'vivs'ka Oblast'		0	<u>Today, 11:36 am</u>	996
	~	jur@sooperthemes.	com	jur@sooperthemes.com	High Peak Junction, Derbyshire		0	<u>Today, 11:02 am</u>	3600
	~	soporte@bcgava.cor	m	soporte@bcgava.com	Cordoba de Cordoba,		0	<u>Today, 10:34 am</u>	137102
	~	ullrich.neiss@crowd	creation.de	ullrich.neiss@crowdcreation.de	Barth, Mecklenburg- Vorpommern		0	<u>Today, 10:15 am</u>	4174
	~	support@sooperthe	mes.com	support@sooperthemes.com	Utrecht, Provincie Utrecht		0	<u>Today, 9:08 am</u>	146067

You can quickly add contacts when pressing on **F** Quick Add have to insert all their information.

You can also click on + New

next to quick add which will redirect you to

another page with a more detailed form to fill out for the new contact.

When you click on a contact it will give you another dashboard that gives an overview of this clients data. It shows their engagements and points, their history, for example like the page hits.

Additionally, there are notes, social, integrations, audit log, and places. On the left side is a tab that showcases all the contact information again, including their points.



...I Preferences

💼 Delete

unpublished campaigns by pressing this. Lastly, it also presents you with the option to delete the contact or to merge them. Additionally, you can also put them into segments by pressing preferences which will give you the option to edit their channels, categories and segments.

Contact Pref	erence Center	×
Channels	Categories Segments	
Chan	nels Frequency	Preferred
✓ Email	each Choose one • Pause from to	۲
		🗙 Cancel 🖺 Save

Companies

Companies is very similar to the contact list. Here you can search for companies, their basic information is showcased in a table. By clicking on one of the companies in the table you will be able to edit their contact information. The table also shows the company email, company website, score the amount of contacts. Just like the contacts section at the top right you can add new companies or if you click the arrow you can import.

Companies + M										
0	Image: Pilter Q									
	~	Company name	Company email	Company website	Score	# contacts	ID			
	~	126.com			0	view contacts 1	105			
	~	163.com			0	view contacts 1	53			
	~	ableengine.com			0	view contacts 1	50			
	~	acm.org			0	view contacts 1	147			
	~	act360.ca			0	view contacts 1	132			
	~	afsc.org			0	view contacts 1	92			

Segments

Segments are like groups and lists. Here is where clients will go depending on their filters or what they do in campaigns. When you click on segments it will show you the published segments and the amount of clients in it.

Contact Segments				
0	Filter.	. Q		
	~	Name	# contacts	ID
	~	● 1 Month Account No Domains (1monthnodomains) 😔	View 218 Contacts	11
	~	● 10+ Domains Registered (highdomains)	View 60 Contacts	15
	~	▲ Active (active)	View 565 Contacts	41
	~	Basic (basic) Basic Scoperthemes subscription	View 413 Contacts	24
	~	C Enterprise (enterprise) 😣	View 5 Contacts	44

To make a new segment click on new. Then you will name it and give it an alias, you can give it a description to make segments easier to differentiate. Next to this you can make the segment public, this option enables segment usage in Mautic with contact preferences and any actions.

Then you can yes/no Available in Preference Center which allows contacts to edit the segment in the preferences center.

New Segment		× Cancel	🖺 Save & Close	 Apply
Details Filters	Alias O	Public Segmer	nt O	
Description		Available in Pr	reference Center 🛿	
つ C B I U Type something		Published No Yes	I	

The second tab 'Filters' is used to give the segments conditions on who will be put into the list. There are a lot of filters such as the clients names, their usernames, Sooperthemes usernames, their address and etc. After you have picked on you have to choose what will determine what clients are going in the segment. This means you can have 'equals to', 'contains', 'starts with' and much more. So for example, if you choose the filter Email 'contains' and then add the filter value such as @sooperthemes, then After the CronJob, Mautic will begin to put contacts into the segment based on the filter value.

🛔 Email	equals	• f	ilter value	Û
Choose one	equals			
	not equal			
	empty			
Contact	 not empty 			
🐣 Address Line 1	like pot like			
Address Line 2	regexp			
Attribution	not regexp			
Attribution Date	starts with			
🖀 Bounced - Email	ends with			
Bounced - SMS	contains			
🖀 Campaign Membership				
A City	*			

Components

Assets

Assets are items which you will provide to your contacts upon completion of a form such as a white paper. Assets are track-able items and can carry their own point values, history and tracking statistics.

Edit Asset		🗙 Cancel 🖺 Save & Close < Apply
Storage Location Local Remote Upload a file (max filesize allowed = 256 MB) Drop the file here or click to browse and select the file.	Preview Eight Rules for Creating Great White Papers EIGDCODE When appears are one of the met interdedistics, interview and the appear, the method with the second	Category Uncategorized Language English X V Ublished Vo Ves Publish at (date/time)
Title * test whitepaper Description つ C B I U Type something	Alias 🛛	Unpublish at (date/time) Block search engines from indexing this file No Yes

Forms

With Mautic you can create forms and attach any fields you want to collect from your users such as Date, time, captcha, URL and much more. You can add the form into a Mautic landing page by using the editor and using the form. Form actions are items to be handled on the submission of the form. You can define multiple actions to be performed on each submission.n the filter value.

Edit Form - Newsletter		🗙 Cancel 🖺 Save & Close 🗸 App
Details Fields Actions		Category
Name *	Successful Submit Action	Uncategorized
Newsletter	Display message 💌	Published
Description	Redirect URL/Message *	No Yes
ଅ ଙ B <i>I U</i>	You are now subscribed. You will soon find a welcome message and co	Publish at (date/time)
Type something		Unpublish at (date/time) Disable search indexing No Yes Kiosk Mode © No Yes Render Style © No Yes Theme ©

Landing Pages

Landing pages are creating pages with specific call to actions. These call to actions may be filling out a form, clicking on a button to download something or to encourage them anonymously to enter more information. The landing page editor is very similar to the way the email builder works.

est landing page PUBLISHED								C Edit 🗙 Close
								Page URL
▼ UEIALS								https://marketing.sooperthemes.com
A Page Views	From	Jun 11,	2019	То	Jul 11, 20	019	Apply	Public Preview URL
1.0 Total visits 1	Jnique visits							https://marketing.sooperthemes.com
0.8 0.7 0.6 0.5 0.4 0.3 0.2 0.2 0.1								Recent Activity Updated by Inke Timm July 8, 2019 2:30 pm CEST Updated by Inke Timm Hull 8, 2019 2:30 pm CEST
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	19 19 19 19 11 10 19 19		10° 11°	1 ¹⁰ 1 ¹⁰			PL'	
Create an A	/B test >							

Campaigns

Here is where you will create and publish campaigns. You can categories campaigns and search for them as well. When you press the plus to make a new one it will take you to options of naming it and giving it a description. Right on the top of that there is the option to Launch campaign builder.



There you can build you campaign. When you click on it, it will bring you to a builder where you have to choose a contact source which are segments you have made or segments collected from forms. (a campaign will fail if you don't have a contact source).

Transactional: these emails can be sent to the same contact multiple times across campaigns.

Marketing: these emails can be sent only once to the contact even if it was sent from another campaign.

How to Create a campaign

Once you have chosen a contact source you can click the grey plus below which will give you the following options: Decision, Action and Condition

Decision 📿	Action 💿	Condition T
A decision is made when a contact decides to take action or not (e.g. opened an email).	An action is something executed by Mautic (e.g. send an email).	A condition is based on known profile field values or submitted form data.
Select	Select	Select

Decision 🔀	Action	Ô	Condition	T
When the contact decides to take some action, the campaign can then trigger different responses. For example, if a contact downloads the brochure for product X, send an email with more information about product X.	It takes some action contact. This can be email', 'update a fiel a contact', change ca etc. There are many here. You can even permanently delete	on the 'send an d value for ampaigns, options a contact.	Evaluates whether a of true, and depending result, lets you respon accordingly. The cond used on either forms values. E.g. is the cont value for company siz 50? If so, send an em toward small busines the prospect filled ou request form? If so, s email with instruction accessing our demove	condition is on the nd lition is or field cact's field te less than ail targeted ses. Or, has it a demo end an ns on vebsite.

When you choose an action that requires an email, it will open another window where you will have to name the email so you know what it is. How you want to execute this event, where you can send it immediately, at a relevant time period and at a specific date/time. You can then choose the email template you have at 'email to send', make a new one or edit a current email. and then you choose the email type which are Marketing and Transactional. When you choose an action that requires an email, it will open another window where you will have to name the email so you know what it is. How you want to execute this event, where you can send it immediately, at a relevant time period and at a specific date/time. You can then choose the email template you have at 'email to send', make a new one or edit a current email. and then you choose the email type which are Marketing and Transactional.

Unsubscribe Settings in Email Settings

Click on the cob at the top right and go to configuration. Go to email settings and scroll down to the unsubscribe settings. There you can edit the unsubscribe text, the unsubscribe confirmation message. Additionally, you can choose to turn off 'show contact preferences settings', show contact frequency preferences and show contracts categories.

You can also edit your resubscribe confirmation message, show contact segment preference, show pause contact preferences and show contact's preferred channel option. These options, allow you to edit the unsubscribe menu that shows up when clients unsubscribe via emails. So if you have 'show contact segment preferences' on then clients will be able to take themselves out of segments and put themselves into them.

Text for the {unsubscribe_text} token 🕑	
Unsubscribe from Sooperthemes promotional emails.	
Unsubscribed confirmation message 😡	Resubscribed confirmation message 🚱
We are sorry to see you go! EMAIL will no longer receive promotional emails from Sooperthemes. If this was by mistake,	EMAIL has been re-subscribed from promotional emails by Sooperthemes. If this was by mistake, click
Show contact preference settings @ No Yes	Show contact segment preferences @
Show contact frequency preferences @ No Yes	Show pause contact preferences O No Yes
Show contact's categories @	Show contact's preferred channel option @

Channels

The channels is a drop down that contains emails, web notifications, text messages and social monitoring.

Emails

You can choose between two email types:

There are also email templates that you can use in your campaigns, by default the emails are transactional. Emails can be created in fully HTML, a mix of HTML and of the slot types.

	Apply Close Bu	ilder	
Ration II	Slot types		
WE REALLY MISS YOU! BEET	A Text	Image	a Image Card
Like really, really! Please give us another chance.	Image+Caption	⊡ Button	Social Follow
	Code Mode	Separator	Dynamic Content
	Drag	the type to the desi	red position.
Enjoy 50% of your next purchase!	Section types		
Coupon Code: 4562789498) One Column	Two Columns	Three Columns
	Drag	the type to the des	red position.
We know it's only been a few months but since you've been gone, we've received a ton of amazing new products that we think you might like.	Customize Slot		
We hope you will give us another chance and come have look.	o c B	ΙU	¶ • A • TI •
Come back!	 ▲ = - /= ● = - 	≡ "·	9 🗣 % 🖬

When you press New, you will have to choose an email template, which can be a premade one, a blank one or full HTML. You can also categories the emails, publish them, choose the subject and the name of it and much more.

Points

Points provide a way to weigh contacts. Points have triggers and action and each term is defined through points.

Poir	Points							
0	Filter.	ter Q						
	~	Name l <u>i</u>	Category	Points +/-	Action	ID		
	~	http://www.sooperthemes.com/drupal-modules	Uncategorized	1	Visits specific URL	4		
	~	http://www.sooperthemes.com/node/2/done contact form submitted	Uncategorized	5	Visits specific URL	3		
	*	http://www.sooperthemes.com/pricing	Uncategorized	5	Visits specific URL	2		
	~	C Lead opens email	Uncategorized	6	Opens an email	1		

Point actions

This is when the contact receives a change in their point total. The actions are either positive or negative based on the action that is determined. When you make a new action point you can name it, choose the amount of points and what a contact has to do to receive this points.

Point triggers

Point triggers are resulting events which are fired based on the achieved point total of a contact. When a contact reaches a minimum number of points, the point trigger is fired and an action is performed.

Stages

Is a way to define the life cycle of a contact. You should create szages based on your marketing stages and move contacts from stage to stage.

To create a stage go to the stages menu and click on the new button and fill in the relevant data. You can use a campaign to move contacts from stage to stage. When you are creating a campaign choose Move a contact to stage action to move the contacts.

Stages					
9 Filter	Q				
•	Name JE	Category	ID		
•	C Active-Enterprise Active customer with enterprise license subscription	Uncategorized	3		
	C Active-Single Active customer with single license subscription	Uncategorized	1		
-	Active-Unlimited Active customer with unlimited license subscription	□ Uncategorized	2		

Reports

Reports can be customized. You have to choose the data source appropriate to the report you want. Each data source has a different set of available columns, filters and graphs.

Each report can be customized to include columns of choice. You can filter data based on set criteria and or/ a set of specific order for the data.

Email Builder

Slot types								
A Text	image	ाmage Card	Image+Caption	₽ Button				
y Social Follow	Code Mode	Separator	Dynamic Content					
	Dragt	the type to the desire	ed position.					
Section types								
Dne Column	Two Columns	III Three Columns						
	Dragt	the type to the desire	ed position.					
Customize Slot								
				G,				
Padding Top								
Padding Bottom px								
Customize Secti	on							
Content Backgroun	nd Color							
Wrapper Reductioned Color								
wrapper background Color								
Wrapper Background Image								
none								
Wrapper Backgrou	ind Repeat							
repeat				•				
Wrapper Backgrou	ind Size (width heiរ្	ght 'cover' 'cont	tain')					

When you make a new email and choose the HTML option you will not have email builder but the option for a media browser. The layout of the builder is quite simple. On the right you can choose your slot types, below that you have the section types. Here you can choose the amount of columns you want to add to the email.

Below that is the customize slot which will only be available with the slot types that need it. For example, text, image caption and other slots. The customize slot will also change depending on what type you are using.

This means when you are editing a text slot, you will have the usual editing options but if you are editing an image caption, you do not get the same editing options like text. Every slot type give you the ability to choose its padding top and bottom. Bellow that you can customize the section your editing. You can choose the background color, wrapper color or even an image if you'd like.

The Builder comes with the following slot types:

- Image
- Image card
- Image + caption
- Button
- Social Follow
- Code
- Separator
- Dynamic content
- Text

Image Editor



When you choose the slot types Image, Image+Caption and Image Card and click on these slot types in your email template, an editor window will pop up where you can change time image, align, give it alternative titles/text, change size and add links.



Text

With this slot you can drag text into the section. You cannot drag the text outside of the section. To do so you have to add another section.

When you click on the text you will get the customize slot on the right. There it features the usual text styling options, you can add sources, images and videos. Additionally, you can look at the code of the slot type. Be cautious that even if you can look at the source and remove and add to it, it will not update in the email preview. When clicking on this you will be able to add your content such as forms and landing pages or tokens such as usernames or client names can be added to make the emails more personalized.

Code

With this slot type you are able to add your HTML code. However, the code editor of Mautic is slightly iffy. This means if your code is messy the section will bug and go to the background of the email editor and you won't be able to edit the code or remove it. Additionally, the customize slot for the code can make it tedious to delete large amounts of code. It sometimes gives you the ability to select and choose the section you want to copy/cut and sometimes you have to individually delete every letter and number.

Dynamic Content

Dynamic content is content specifically designed for contacts you want to show more. A known contact must be part of a campaign in order to trigger it. Mautic has two types of dynamic web content

Filter-based

You can configure filters (just like in segments) so a landing page with a DWC token or slot can show content based on specific conditions.

Campaign based

Here you can add your Dynamic content in your email campaign. The default will be delivered via the 'request dynamic content' decision in the campaign. In order for this to work you will have to embed code into your website/ landing page or using one of the content management plugins.

Channel

Focus Items

Focus gives you the ability to engage with users through bars, modals, notifications and full page takeovers.

Filter-based

You can configure filters (just like in segments) so a landing page with a DWC token or slot can show content based on specific conditions.

Campaign based

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What should the focus be?



Collect data Use a Mautic form to collect data from the visitor.

Display a notice Display a notice to your visitors.

Emphasize a link Get visitors to click through to a specific URL. The first step is to decide what the focus item should focus on. Each focus has its own editing options below when you choose them. You can Animate, choose when to engage which means should the visitor be engaged every time, once per session or during a period of time.

'Stop 'engaging after a conversion', this means once a user clicks the link or submits the form (doesn't work for displaying a notice), enabling this option will no longer engage visitors.

• Collect data

17

• Uses a mautic form in the outpost as the content. The form should be very simple (one or two inputs) as there is very little room to work with in some of the styles. It is good for capturing emails for newsletter signup.

- Display a notice
 - Information only and is great for announcements and related things.
- Emphasize a link
 - Great for landing pages with an event, sale, promotion, etc. It displays a button to click and will direct to the given link.

What style should be used?

These are the options you can choose from to style. In addition to this you can, choose the position, it's size, stickiness, have the page pushed down

Bar

This displays a bar across the top or bottom of the page. You can hide it, push the page now and if it is set to no, then the bar will overlap the page content. Additionally, you can make it sticky which means the bar will be always present while scrolling.



Modal

A small modal window that appears centered on the page. The styling options are relatively simply for modal, only giving you the option to adjust the placement.



Notification

These are like modals but smaller and slide from slide in from the side.



Full page

Х How often to engage? Once per day Stop engaging after a conversion? 🛛 No Yes **10% Discount Code** 🖵 What style should be used? Our newsletter updates help you improve your Drupal site building and marketing knowledge. Bar Display a bar across the top of the page You'll only get 2-3 emails a month. And you get a coupon code, who doesn't like coupon codes? Email Modal a popup in the middle of the page Notification 0 w in a corner of the pag 100% Free, no account registration needed. Powered by Mailchimp Full Page ow that covers the entire page Colors 💷 Content

This is also similar to a modal, but it takes up the entire page.

J Colors	
Primary color	
07e0ea	Ø
Text color	
000000	Ø
Button color	
f86353	Ø
Button text color	
fffff	ð

Color

By default, Mautic will determine the top colors extracted from the snapshot. Four colors are supported for primary color, text color, button color, and text color.

Content

In the content tab there are 3 different content modes.

Basic Editor HTML teadline 10% Off Our Themes For A Limited Time agline Get updates for our Drupal design and site built ont Arial Join now to download ink URL *	.oncent n	ioue o		
eadline 10% Off Our Themes For A Limited Time agline Get updates for our Drupal design and site built ont Arial ink text * Join now to download ink URL *	Basic	Editor	HIML	
10% Off Our Themes For A Limited Time sigline Get updates for our Drupal design and site built ont Arial nk text * join now to download nk URL *	eadline			
agline Get updates for our Drupal design and site built ont Arial ink text * Join now to download	10% Off	Our Then	nes For A Limit	ed Time
Get updates for our Drupal design and site built ont Arial ink text * Join now to download ink URL *	agline			
Arial sink text *	Get und	ates for o	ur Drupal desi	on and site build
Arial Arial Ink text * Join now to download Ink URL *	occupa		ar braparaes,	Sil alla sice ball
Arial * ink text * Join now to download ink URL *	ont			
ink text * Join now to download ink URL *	Arial			
Join now to download	ink text '			
ink URL *	Join nov	v to downl	oad	
INK URL *				
	INK URL			
http://www.sooperthemes.com/pricing	http://w	ww.soope	rthemes.com/	pricing
nen link in a new window?	pen link	in a new	window?	
per link in a new window.				

Basic

In the basic content mode you have the ability to write a headline, a tagline, stylize it, the link text and link URL. This will edit a modal like window.



🖽 Content Content mode 😧 Basic

Editor

C C

TI -

S

Editor

В I U

⊞

Type something

HTML

12 ≔ **66** -

</>

2

HTML

You can code the focus item if you do not want to use the other options. Within the code mode you can also add your focus forms. Similar to the options above, when you use code to add your focus item it will also appear as a modal.

Fditor

The editor allows you to edit your content. It is very similar to the text editor, allowing you to stylize your text, add images and much more. This will also appear as a modal

Social Monitoring

¶ -A۰

Here you can see mentions of your company you are getting on Twitter and hashtags. As people use the specific hashtag or mention that your are monitoring, you will see them being added to your contact list. With this you can make a campaign

Social Monitoring

Hashtags

Go to social Monitoring and click new. Select the twitter hashtags as the monitoring method if that is what you want to be tracked. Type the hashtag you wish to minitor in the Twitter Hashtag box.



Adding the focus to your website and Campaign

To add the focus on the website, click on the focus you want and click 'Focus Installation'. You will have to copy the code given in your site before closing the body tag.

Focus Items actions depend on the page visits. That means, you have to add it just after the 'Visits a page decision' Visits a page - show focus items

Step by Step guide to creating a Campaign

This is a step by step guide on how to create a simple campaign.

Cron Jobs: 3,3,3,3<— mautic:segments:update 3,3,3,3 <— mautic:campaigns:update 3,3,3,3 <— mautic:campaigns:trigger

Be mindful that although these are the cron job times we have chosen there seems to be a 13 minute delay for each trigger and update. So this means if you have your email set for 'immediately' then the email will be sent 13 minutes after or if you have 'set at a relative time' remember that there is are \pm 10 minutes of waiting time. This counts for everything related to campaigns.

Step 1:

To create a campaign go to the 'Campaign' and press . Add the relevant information, such as the title and a description if you would like. Depending on your objectives, you can enable 'Allow contacts to restart the campaign', when enabled, if a contact is removed from the campaign for any reason and then added back they will restart from the beginning.

You can add a category to make it easier to differentiate your campaigns your list. You can choose to publish date and unpublish date. However, I do not recommend it since if you schedule a time it will not send it that exact time but rather when the Cron Jobs updates.

New Campaign	Caunch Campaign Builder	× Cancel	🖺 Save & Close	 Apply
Name * Example Campaign Description つ C B I U This is an example.	e	Category Uncategorize Allow contacts No Yes Published No Yes Publish at (da Unpublish at (da	ed s to restart the cam cate/time) (date/time)	₹ paign Ø
		Unpublish at (date/time)	

Step 2:

It is also recommended that if you are using 'Contact Segments' to have your segment lists prepared before you begin to build the campaign. The segments you have created will update according to the time of the cron jobs.

Edit Segment - Test S	Segment (ts)			× Cancel	🖺 Save & Close	 Apply
Details Filters				Р	ublic Segment 🕑	
Choose one	Ŧ			A	vailable in Preferen	ce Center 🕑
🛔 Email	contains	T	@sooperthemes.com	P	ublished	

For this guide we will make a quick segment. Click on to **+** New make a new segment. Add the relevant information and go to 'Filters'. There you will choose Email and that it 'contains' the value "@sooperthemes.com".



Then disable the option to make the segment 'Available in the Preference Center'. That is because the segment will show up in the contact preference when clients unsubscribe and we do not want them to see what segments we have put them in.

Step 3:

Once you are in the builder you will have to choose your contact source. 'Contact Segments' means you can pick from your segment list while 'Campaign Forms' this means they are contacts that come from form submissions. For this step by step guide we will just use 'Contact Segments'.

嶜 Add a contact source	
Contact Sources	
Choose one	*
	Q
Contact segments	
Campaign forms	

It is also possible to add multiple segments through 2 ways. One being by hovering over the grey half-circle and clicking the yellow circle \bigcirc on the side and adding via contact submissions.



The other way is to click on the square and the blue pencil and then add more segments. Remember that if you come back to edit your campaign and add another segment, they will not join the Campaign half-way through. You will have to restart the campaign or put them in a new one.

Test Segment (ts)	Contact Source Contacts that are members of the selected segments will be automatically added to this campaign. Contact segments *	
	Test Segment (ts) 🕷	
	1 Month Account No Domains	•
	10+ Domains Registered	
	Active	
	Basic	Ľ
	Enterprise	
	New Clients OB	
	Newsletter	
	On-boarding Program	
	Professional	Ŧ

Step 4:

Now you will begin to make the campaign. The way the campaign is set us will be very similar to other types. For the purpose of this step-by-step we are creating a campaign that has a mix of some of the most used features. However, every campaign will have different amounts of decisions, conditions and actions.

Click on the grey circle 💿 and you will have the following options:



Pick action and type 'Send email' or scroll down the list to find it. You will then name the email to 'Send Email1#' or any other name to help you remember what the purpose of this action is, you then pick the email if you already have some set up or you can make a new one on the spot with **Wexternal**. Then pick 'at a relative time period' and choose the time you want this event executed. For the sake of this example, we will just 3 minutes. Under most circumstances you would pick the email type 'marketing' because it prevents the email from being sent to people have already received.

Transactional	Marketing
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However for this case, we will be using 'transactional' since that will give us the option to have the same emails be sent to the same contacts multiple times. This is good for testing purposes when it comes to creating campaigns. Once you are done, click

Step 5:

+ Add

Now click on the grey circle under the first action you made and choose 'Decision'. Find 'opens email' and name the trigger.

Opens email Trigger actions when an email is opened. Connect a "Send Email" ac decision.	tion to the top	of this
Name		
Opens Email		
	Y Cancel	+ Add
	~ cancer	T Add

This means that the contacts in the segment will have to make a decision. If they 'opens email' then this will trigger another section of the campaign.

When you click on the event 'opens email' you will see that you get one red plus and one green one. The green one \bigcirc means the client has successfully taken the action and the red one \bigcirc means contacts have not fulfilled this action.



Click on 💿, this will give you the options **Action**, **Decision**, and **Condition** options again. For our example, we will choose 'Action' and pick 'send email'. Just as before name it, pick the email, leave the type as transactional and choose 'immediately'.

As you can see, the campaign is slowly branching out. Here we can see that the test segment will receive an email after 1 minute. If they open the email they will then be sent another email immediately. This means the contact took the decision to open.



You can also add another action the campaign will take with the contacts that haven't triggered the action of 'opens email'. In our example, we have picked another 'Action' trigger.

Opens Email		Send email Send the selected Name	email to the co	ntact.				
		Email 3						
weit 1 day	within 2 days	Execute this even	t if the contact	t does not	take actio	on 0		
wait i day	within 2 days	within a relative	e time period	by a sp	ecific date	e/time		
Send email 2	Email 3	# 2		day(s)				٣
		Schedule at	or b	etween th ays of the	ne hours o	f	and	
		Monday	Wed	nesday		Friday		Sunday
		Tuesday	Thur	sday		Saturday		Weekdays
		Email to send 😧 *				Email ty	pe 🕜	
		en On-boarding	5		× v	Transa	ictional	Marketing
		+ New Email	C Edit Emai	il 🛛 🗗 Pi	review Em	ail		

This means that if the client does not open the email they will get the following email a day later rather than immediately if they had opened it.

Step 6:

Press the grey plus under the segment box and add another Action 'send email'. Just as before, choose the title of the action, leave the type as 'Transactional' and choose 'send at a relative time period' and have it at 5 minutes. This means that the third email will be sent 5 minutes after the first one.

Press the grey plus and choose **'Condition'** and for our example we choose the condition 'Country' and the value at 'America'. This means that Clients who are in American will receive the email. If they do not reach condition they will receive the same email or a different one at a later time.



You can then press the grey plus on the right to add an alternative route the campaign will take if the clients don't fit the condition. **Conditions** have an orange border while **Decisions** have a green border.

You can keep repeating this process and switching it around depending on what your goals are for the campaign.

Click Apply Close Builder and if you want publish your click on the yes at 'Publish'

It will trigger once the cron jobs have updated. You will see the status of the the Campaign next to its name and it will say **PUBLISHED**.

Overview of your Published Campaign

Once you have your campaign published you will now be able to follow the Campaign statistics. When you scroll down you will also see the tabs 'Decisions', 'Actions', 'Conditions' and 'Contacts. However there can be less tabs depending on what's in your Campaign. So, if your campaign only has Actions then you won't have the 'conditions' tab or the 'decisions' one.



Click on any of the tabs you will see orange and red lines. These lines are a visualization of the success percentage and the failed percentage.

Preview	Decisions	Actions	Conditions	Contacts
0% 100%	7 0		Clicks 100%	Email is clicked
0% 100%	7 0		Opens 100%	Email is opened
14.3% 85.79	6 7 0		Opens 100%	Email is opened
0% 100%	7 0		Clicks 100%	Email is clicked
0% 0% 0	3		Replies 0%	Replied to email

The green square is the percentage of success. 14.3% The orange square is when contacts have failed to do the trigger. 85.7% The yellow square shows the completed actions. 7 The grey square shows what actions are still pending. 0

Identified issues with Mautic

Messy/ Incorrect code

One thing you have to be careful with when using the email builder of Mautic is that if you are adding HTML and it is not written correctly you may face the risk of completely losing the template you have been working on.

When the code is wrong, it will go into the background of the template and will become uneditable and you won't be able to delete it. Make sure if you are using HTML that it's clean and correct to avoid ruining your email in Mautic.

Make sure to regularly save

There seems to be an issue with Mautic where if you have the tab open too long the software will encounter issues. It will say 'Item not found' or 'CSRF token error.Try to refresh page and try again'. However if you do refresh the page, your progress will be gone

Sometimes if you are working on an email and you come back a few hours later and the tab was still open, you will not be able to apply or save the template. Make sure you save every few minutes to make sure you don't lose your progress.

ltem was not found.	CSRF token error. Try to refresh the page and try again.

Issues with Campaigns

Another issue other than the cron jobs is that the campaign will update the statistics even if the email hasn't been received. This may affect the accuracy of using the metrics that are shown.

Email layouts appear differently in the builder and when sent to contacts

When building an email in Mautic or exporting the HTML from STRIPO you will immediately notice that your email layout will look different. In Mautic not all custom fonts will show up even if you have added it and this counts for web browsers. If you check the test emails in an application then the fonts will appear.

Your emails templates will also look bigger. This means the font sizes, the widths of the tables and the images all look wider and bigger in Mautic. However, once you send it, you will see that the text is suddenly smaller, the images are smaller and the your width has become also become smaller. Keep that in mind when creating templates.

The image below shows that on the right the image in the Mautic builder appears bigger than it does on the left which is an email sent to a Gmail account.



So, if you look at the email with the Outlook application called Mail rather than through your web browser you will notice a difference. The images below show the difference: the first image is from the Mail application while the other image is from opening Gmail on Chrome. The most obvious difference that can be seen is how the '1' appears in an email application versus on a browser.



Issues with Email templates

Another issue to look out for is that if you want to switch between the blank template and HTML template in the email builder, remember you will lose all the work you have done if you switch.

In addition to this, it seems that Mautic only supports HTML and a little bit of CSS. Other coding languages may break your layout in Mautic and look perfectly fine in a different program.

Cron Jobs being Iffy

When it comes to Mautic updating segments, it appears to have no issues if the data is present for it to update the segments.

However, this is not the case for campaigns triggering. Keep in mind that you cannot rely on super specific times to send out your emails and that's recommended to not do it by minutes but rather days.

As you can see from the images below, the timing for the email to be sent out is to 'wait 1 minute', you can also see that the Campaign update at 10:50 am. However, in the second image you can see it got into the Inbox 18 minutes later.

