

# **User Manual**

1.8.7

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# **Version History**

Version History						
Date	Author	Version				
March 1, 2012	Stuart Stevenson	1.3.3				
March 7, 2012	Gordon Johnston	1.3.5				
October 31, 2012	Gordon Johnston	1.8.7				



# **Conventions**

Throughout this manual, areas of the target360 interface will be referenced by name. The various components are outlined below:



Figure 1 - The Important Areas of the target360 Application



# Introduction

Congratulations in purchasing *target360*, the software product that unifies and measures your company's sales and marketing. This is the user manual for the system and contains the main features with relevant screenshots and descriptions to allow you to navigate your way around and make the most of the *target360* features.

If you would like to ask questions or have comments on the user manual, please contact us on the following address:

**target360** London King's Cross Hamilton House Mabeldon Place London WC1H 9BB

www.target360.com/training



Broadly speaking, *target360* supplies the following services:



### **Email Campaigns**

Email Campaigns

Web Analytics and Social Media Management will combine to generate Leads (marketable individuals who are showing an interest in your products and services).

The next step for your organisation will be to filter these Leads your way and form targeted Marketing Lists which can help you convert Leads to Opportunities to Sales in the most efficient manner possible.

### **Web Analytics**



Web Analytics is the measurement, collection, analysis and reporting of internet data for the purposes of optimizing web usage.

With *target360* you can record how many times each page in your web site has been visited and how many unique visitors you have per page. These visits can be tracked against leads via profiling, allowing you to build up a picture of individual visitors to your web sites. Using Form Capture, you can turn anonymous visitors into marketable leads with the potential to become your customers.

### **Social Media Management**



Social Media Tracking is the collection, analysis and reporting of user interactions with your organisation, brands and communications via social media content such as blogs, wikis, social networking and direct marketing.

With *target360* you can determine when users click on your links as well as the social media involved.

Link Tracking can be combined with Web Analytics to build up a picture of how visitors are using your site, what are your most popular media routes and identify potential leads and opportunities, all automated for you by *target360*.



# **More Help**

### Web Site

The *target360* web site is available at:

• <u>http://www.target360.com</u>

### **Training Pack**

You should have received you training pack shortly after purchasing *target360*. Please contact us through your support package if you have not.

The training pack consists of walkthroughs, videos and a copy of this user manual. You should run through these resources with your key users in order to familiarise yourself with the *target360* system.

### **Training Videos**

Training videos are available in the Resources section of the *target360* web site:

<u>http://www.target360.com/resources/training</u>

### Community

[TODO]



### **Invitation to target360**

When you receive your invitation to access *target360* you will need to sign on to the system for the first time. There are two ways to access target360, and the way you sign in depends on the first email you are sent with your login details. If your invitation email looks like the following:

Dear	
orga	has invited you to use Microsoft Dynamics CRM Online with the nization:
To a	ccept this invitation:
1. 2.	Click the following link or paste the link into your browser: https://signin.crm4.dynamics.com/portal/r.aspx?token=YANN-ZLTD-JM3T- RIK1 Sign in with your Windows Live ID @target360.com. If this e-mail address is not a Windows Live ID, click "Get a Windows Live ID" and use this
	exact e-mail address to create a new Windows Live ID.
In th	exact e-mail address to create a new Windows Live ID. e future, you can sign in directly by going to s://crm4.dynamics.com/
In th http: This days	exact e-mail address to create a new Windows Live ID. e future, you can sign in directly by going to <u>s://</u>
In th http: This days Thar The	exact e-mail address to create a new Windows Live ID. e future, you can sign in directly by going to <u>s://</u>
In th http: This days Thar The This ©20	exact e-mail address to create a new Windows Live ID. e future, you can sign in directly by going to <u>s://</u>

Figure 2 - Windows Live Invitation

Proceed to the section "First Login – Online Access." Otherwise, go to section "First Login – Hosted Access."



# **First Login – Online Access**

In order to access *target360* you will require a **Windows Live ID**. If you do not have one at this point it will give you the option to create one.

The invitation email will contain a unique link that will take you to the first initial signup process. It will also include a link that you can bookmark and use in the future to access *target360*.

The steps are as follows:

1. Click on the link or copy and paste it into your browser (Internet Explorer 8.0 or later)

You have been invited!
Dear <b>Carlos and Carlos</b> ,
organization:
To accept this invitation:
<ol> <li>Click the following link or paste the link into your browser: https://signin.crm4.dynamics.com/portal/r.aspx?token=YANN-ZLTD-JM3T- RIK1</li> <li>Sign in with your Windows Live ID @arget360.com. If this e-mail address is not a Windows Live ID, click "Get a Windows Live ID" and use this exact e-mail address to create a new Windows Live ID.</li> </ol>
In the future, you can sign in directly by going to https://teaching.crm4.dynamics.com/
This invitation is valid only for <b>Constant 1</b> @target360.com and will expire in 14 days. To obtain another invitation, contact David Small.
Thank you, The Microsoft Dynamics CRM Online Team
This e-mail was sent by an automated system. Please do not reply to this message. ©2010 Microsoft Corporation
Learn   Contact   Legal   Privacy More   Us

Figure 3 - Windows Live ID Invitation Email

2. Your browser will display the following login screen and you have two options. If the email address to which the invite was sent has already been registered with Windows Live you can simply sign in (proceed to Step 4), otherwise you will have to create a Windows Live ID (Step 3).



To accept this invitation to join Microsoft Dynamics CRM Online, you must sign in with a Windows Live ID with the same e-mail address where you received your invitation.	sign in
If your e-mail address is a Windows Live ID, sign in with that Windows Live ID. Otherwise, associate your e-mail address to a Windows Live ID by clicking Get a Windows Live ID	Windows Live ID:
If you do not want to use this e-mail address as your Windows Live ID, contact the person who sent the invitation and give them the Windows Live ID that you	Password:
person who sent the invitation and give them the Windows Live ID that you ould prefer to use.	Can't access your account?
Get a Windows Live ID	Keep me signed in
	Sign in
	Not your computer?
	Get a single use code to sign in with

Figure 4 - Windows Live ID Login Screen

**3.** In order to sign up for a Windows Live ID you must fill out a short form with valid information. The email address used must be the same email address within the *target360* invitation.



It gets you into all Windows Live s All information is required.	ervices—and other places you see 🍣
	If you use <b>Hotmail</b> , <b>Messenger</b> , or <b>Xbox</b> <b>LIVE</b> , you already have a Windows Live ID. Sign in
Use your email address:	@target360.com
	Or get a Windows Live email address
Create a password:	•••••
	6-character minimum; case sensitive
Retype password:	•••••
Mobile phone:	United Kingdom (+44)
	7837 930000
First name:	
Last name:	
Country/region:	United Kingdom
Postal Code:	G3 8PH
Gender:	Male  Female
Birth date:	April 💌 27 💌 Year 💌
	Enter the characters you see New   Audio   Help
	International usleol
	international uslsol
	Send me email with promotional offers and survey invitations from Windows Live, Bing, and MSN. (You can unsubscribe at any time.)
Clicking <b>I accept</b> means that you a	agree to the Microsoft service agreement and privacy statemer
	I accept

Figure 5 - Create a Windows Live ID

Please ensure that valid information is entered into all the fields as you will require these details should you forget your password and need to go through account recovery.

**4.** Once you have either signed in using an existing Windows Live ID or successfully created a new one you will be asked to verify the invitation.



Invitation Details		
Name:		
Windows Live ID:	@target360.com	
Organization:		
	https://	
If you are not Dave Burrell or heli	we this was sent to you by mistake do not proceed. Click Cancel	
If you are not Dave Burrell or bei	we this was sent to you by mistake, do not proceed. Click Cancel.	

Figure 6 - Windows Live ID Verification Email

You must ensure that the email address and organisation are correct and as supplied by **target360**. If all details are correct please click 'Next''. If any details are wrong please contact **target360** support.



 To access target360 you must accept the Terms of service by selecting "I Accept the Terms of Service Agreement" and clicking 'Next'. If you do not agree to the terms you will not be able to access target360.



Figure 7 - Windows Live ID Terms & Conditions

**6.** You will again be given the option to bookmark your *target360* system address. To do this, click on 'Bookmark' or copy and paste the address into your favourites.

Launch CRM Online	
access your organization d	lirectly in the future, bookmark your organization URL.

Figure 8 - Launch CRM Online

Once you have a note of your system address for future reference click on the orange 'Launch CRM Online' button as shown below.



7. *target360* will now launch to the initial default system dashboard, as shown below:



Figure 9 - target360 Home Page



# **First Login – Hosted Access**

When your *target360* system is set up, you will receive an email from the system administrators with details on how to log in. This will include:

- User name: Usually in the form of an email address
- Password: Unique for each user
- URL to access *target360*

When you follow the link it will take you to the login screen:

Sign In
The O Cloud
Type your user name and password.         User name:       Example: Domain\username         Password:       Example: Domain\username
Sign In

Figure 10 - target360 Login Screen

Type in the username and password provided, and you are ready to start using *target360*.



# **1 Web Analytics**





# **1.1 What is Web Tracking?**

### 1.1.1 Introduction

Web Tracking is the process of identifying and analysing visitor behaviour on your website.

Target360 allows you to collect three types of information from your website which directly relate to web tracking and analysis:

- 1. Visitors
- 2. Visits
- 3. Form Fills

Generally your goal will be to coax visitors into form filling on your web site so that you can capture his or her email address. Target360 not only provides this anonymous visitor capture mechanism but also allows you to automatically convert anonymous visitors into marketable leads via form capture.

The following sections provide a more detailed description of visitors, visits and form fills.



# 1.2 Visitors

Visitors are anonymous individuals who make one or more visits to your web site.

https://redspirede	mo.crm4.dynamics.com/main.aspx?etc=10118&extraqs=%3f. 🔎 👻 🗎 🖉 🗙 🛛 🏄 Visitors: Active Visitors - Micro 🏼 🚈 Visitor: Redspire.co.uk: 520 🗴	☆ ☆
File Visitor Add Custo	Microsoft Dynamics CRM	CRM Admin 🥝 Redspire Demo 🚕
Save & New Save & A New Close ★ Delete Save	Sharing - Copy a Link Bermait a Link Collaborat     Image: Copy a Link Report - Data	
Information - General - Visits	Visitor Redspire.co.uk: 520-13512652910 Redspire.co.uk: 520-13512652910	Visitors • 🛊 🔹
PageViews Notes Related	▼ General       Visits     1       Site	✓ 16:27
	Visitor Information           IP Address         195.188.200.12         Company         Virgin Media           Region         Sheffield         Country         United Kingdom           Contact         Image: Contact         Image: Contact         Image: Contact	
Processes	<ul> <li>✓ Visits</li> <li>Company Landing Page   IP Address   Pages Seen   Region   Country   Time on Site</li> <li>■ A subject to the second second</li></ul>	Campaign Activ   Visit 🖓
	•         •	birect 20/10/ ►
	▼ PageViews     □ Page Day Date ▲ Page     Page Page Page Number	2
	26/10/2012 legals_terms_of_use.php 1	
	1 - 1 of 1 (D selected)  Notes	4
	Status Active Username	520-13512652910

#### Figure 11 - The Visitor Form

By adding a simple Web Tracking Code to your website (shown later in this chapter), Target360 can automatically determine:

- The region and country from which the visit originated;
- The name of the company to which the visitor belongs;
- The pages which were viewed by the visitor and the order in which they were visited.

The ultimate goal in marketing is to transform anonymous visitors into leads and ultimately customers. Target360 facilitates this by:

- Allowing you to track multiple visits by the same visitor;
- Identifying the company to which the visitor belongs (even if they never fill in a form on your website);
- Identifying the visitor and converting him or her into a lead by capturing their identity via a form fill.



# 1.3 Visits

Visits represent single browser sessions on your web site where a visitor arrives, browses one or more pages and then leaves or closes their browser.

~						
https://redspireder	mo.crm4. <b>dynamics.com</b> /	/main.aspx?etc=10120&ex	tr: 🔎 – 🔒 🖒 🗙 🏄 Vis	its: Active Visits - Mio	crosoft 🏄 Visit: Redspire.co.uk:88522: >	· ① ① ②
File Visit Customize			Ad Microsoft Dynamics	CRM		CRM Admin 🙆 Redspire Demo 🚕
Mark Complete Save Save Save Save Save	& New te To Opportunity	To Case Promote to Response onvert Activity	Connect Add to Queue Queue Detai	Sharing ↓ Item Is Is Is Is Is Is Is Is Is Is	Kun Start Process Data	
Information	Visit					
General	Redspire.co.uk:88522: 26/10/2012 16:27:59					
Page Views Form Captures	Visit Date	26/10/2012 16:27	7			
Related	▼ General					<u> </u>
4 Common	Туре	New		Ŧ		
Audit History	Date	26/10/2012	16:27	Time on S	32 seconds	
Targeted Email Respon	Visit Number	1		Pages See	en 1	
▲ Processes	Site	Redspire.co.uk		Q Visitor	Redspire.co.uk: 520-1351265	2910
	Referrer Informat	tion				
	Keyword	Terms And Condition	ons Statements	Referrer	http://www.google.co.uk/ur	
	Landing Page	legals terms of use	e.php	<b>a</b>		
	Campaign Inform	ation				
	Campaign Str	Direct	Route	Direct	Campaign Activity Str	:ct
	Campaign		Digital Route		🔍 Email Campaign	<u> </u>
	Visitor Information	on				
	IP Address	195.188.200.12		Company	Virgin Media	
	Region	Sheffield		Country	United Kingdom	
	Contact			🔯 Lead		Q
	▼ Page Views					
	Page Day Da	ate 🔺 🛛 Page		Pag	e Number	3
		26/10/2012 legals_terms_	of_use.php		1	
	1 - 1 of 1 (0 selecte	:d)				H ◀ Page 1 ▶
	▼ Form Captures					
	🗌 🛛 Date 🔺	Field Name	Field Data		Site Visit	2 -
	Status	Completed				

#### Figure 12 - The Visit Form

Target360 can determine:

- The site/page from which the user came to your site (the referrer);
- The keyword(s) used to find your site if they came from a search engine such as Google or Bing;
- The page that they landed on;
- The pages viewed within the session;
- How long the visitor remained on your site;
- Whether the visit was the result of an email or digital campaign.

A Visitor can have many visits or sessions and this enables you to build up a profile of visitor behaviour helping you to evaluate the popularity of specific landing pages on your website.



### **1.4 Form Fills**

A good web site will contain one or more forms designed to capture the identity of anonymous visitors.

It may be that visitors must tell you something about themselves in order to read or download content or they may simply fill in a form to evaluate your products or services.

You can capture these form fills directly and automatically into target360 by adding some simple form configuration details to the target360 system.

< 🔿 🏄 https://redspired	edemo.crm4.dynamics.com/main.aspx?skipnot 🔎 🗧 🖒 🗙 🏒 Form Capture Configuratio 🗴 🔤	<b>↑</b> ★ ₩
File Form Capture Configur	Microsoft Dynamics CRM	CRM Admin @ Redspire Demo
New Edit X Delete -	Copy a Link + E-mail a Link + Run Import Data + Copy a Link + Run Import Advanced Find	sign Oat
Records	Collaborate Data	
settings360   🏠 燥 -	Form Capture Configurations: Active Form Capture Configurations -	٩
4 Email Campaign	□ Name ▲ Created On	2 <
Solution Configs Email Configs	01/10/2012 08:48	<b>i</b>
a Targeted Email Errors		Clic
4 Web Analytics		k her
Lead Score Configuratio		e to
Form Capture Configura		view
4 Administration		the
Visit End		char
Brror Logs		
🂩 Send Campaigns		
Dynamics     Imports		
4 Offline Activity		
) Offline Activity Types		
🔀 target360		
settings360	1 - 1 of 1 (0 selected)	M 4 Page 1 ▶
Settings	AII # A B C D E F G H I J K L M N O P Q R S T U V	W X Y Z

Figure 13 - The Form Capture Configuration Grid

Once set up, target360 will automatically handle the process of converting anonymous visitors into leads which can then be contacted and qualified by your sales team.

Target360 can also be set up to send alerts to teams and users of the system when new leads are created. You can also combine this functionality with your own Dynamics CRM Workflows in order to nurture leads over time.



# **1.5 How do I set up Web Tracking?**

### 1.5.1 Installing a target360 Tracking Code

Installing *target360* on your website involves inserting a small piece of code in the footer of each page from which you wish to track or capture form fills. The benefit of *target360* is that it will not only capture the lead data, but will tie this together with future and past visits from the same visitor so long as the visitor does not clear their cookie cache.

If you do not have a content management system (CMS), setting up the new code within the website is a manual task on each page. However, if you are running a CMS it is a more straightforward template change. The required html code is shown below.

<u>NB</u> You will have been supplied with the exact code that you require to insert into your website. The code used below is a sample.

```
target360 Code
<!-- Start of embedded target360 -->
<script type='text/javascript' src='http://track.target360.com:8080/include.js?domain=www.radicalblue.co.uk'></script>
<script type='text/javascript' >
    sWOResponse=";
    if(typeof sWOTrackPage=='function')sWOTrackPage();
</script>
<script text="text/javascript" src="'http://track.target360.com/formfill.js"></script>
</script>
</script>
<<!-- End of embedded target360 -->
```

Most web pages on the internet are made up of the same standard elements. The **target360** code needs to be inserted in a specific place to ensure that it will capture all visits, visitors and form fills i.e. within the '<body>' and '</body>' tags.

Standard Web Page Makeup
<html></html>
<head></head>
<body></body>
[WEBSITE CONTENT]
<html></html>



```
      Website with Code

      <html>

      <head></head></br>
    </bdy>

      <head>

      <body>

      [WEBSITE CONTENT]

      <!-- Start of embedded target360 -->

      <script type='text/javascript' src="http://track.target360.com:8080/include.js?domain=www.radicalblue.co.uk'></script>

      <script type='text/javascript' >

      sWOResponse=";

      if(typeof sWOTrackPage=='function')sWOTrackPage();

      </script>

      <script text="text/javascript" src="http://track.target360.com/formfill.js"></script>

      <!-- End of embedded target360 -->

      </body>

      </body>

      <httml>
```

If you experience any issues with code placement please contact your account manager or support via email on support@*target360*.com.



### **1.5.2** Walkthrough: Form Capture Configuration

In order for *target360* to track your potential customers' website visits and store them as sales leads, they will need to fill in a form on the website.

**target360** will automatically capture new leads into the system via your website forms so long as the form page has the **target360** Tracking code installed. However, for this to work correctly you must tell **target360** what forms you wish to capture and how to store the data:

1. Click on 'settings360' on the bottom of the navigation bar on the left-hand-side. You will only have access to these settings if you have the correct permission to do so i.e. set up as a Managing Director, Marketing Manager or Sales Manager.

X	target360
¥	settings360

2. Click on 'Form Capture Configurations', again on the left menu.



3. You will see a list of any current form capture configurations, which you can edit. However, in this case we are going to create a new one. Click on 'New' button in the Ribbon.

14
New



Information	Form Capt	ure Configuration	F	orm Capture Co 🔻 🕸 🕸
- General	New			
L Address				
Related	* General			
4 Common	Name			
	Form Type	Select:		
4 Processes	Salutation		Business Phone	
	Firstname		Mobile Phone	
	Lastname		Fax	
	Company		Website URL	
	Job Title			
	Email			
	Description		Number of Employees	
	a Address			
	Ctrast 1		State / Province	
	Streat 2		Zin / Postal Code	
	Street 2		Country / Denies	
	Street 5		Country / Region	
	City			
Co to the webp	Figure 14	Form for example use	ation Form	contact ( by typing i
Go to the webp URL.	age that contains your	form, for example www	w.radicalblue.co.uk/d	contact/, by typing i
	© www	.radicalblue.co.uk/c	contact/	
	Figure 15	- Type you web form into	the Browser	
	1 15 01 0 13	.,		
	Ŭ			
The next stage i do this by lookir way is to use a install Google Cl	is to identify the name ng at the form source f small tool designed to hrome ( <u>https://www.g</u>	of each field on your for rom your browser's opt o show you form detai oogle.com/chrome/)	orm as well as the fo tions. However, a mu ls. For this, you wil	rm name itself. You uch quicker and effe I need to download
The next stage i do this by lookir way is to use a install Google Cl	is to identify the name ng at the form source f small tool designed to hrome ( <u>https://www.g</u>	of each field on your for rom your browser's opt o show you form detai oogle.com/chrome/)	orm as well as the fo tions. However, a mu ls. For this, you wil	rm name itself. You uch quicker and effe I need to download
The next stage i do this by lookir way is to use a install Google Cl In addition y ( <u>https://chrome</u> installed Chrom	is to identify the name ng at the form source f small tool designed to hrome ( <u>https://www.g</u> ou Google Chrome <u>google.com/webstore</u> e and Web Developer	of each field on your for rom your browser's opt o show you form detai <u>oogle.com/chrome/</u> ) you also need to <u>you also need to</u> a small "Gear" icon w	orm as well as the fo tions. However, a mu ls. For this, you wil o install the We todmiekhinmfkcnidh	rm name itself. You uch quicker and effe I need to download b Developer Tou hm). Once you ne address bar as sh
The next stage i do this by lookir way is to use a install Google Cl In addition y ( <u>https://chrome</u> installed Chrom below. Click on	is to identify the name ng at the form source f small tool designed to hrome ( <u>https://www.g</u> ou Google Chrome <u>.google.com/webstore</u> e and Web Developer this icon.	of each field on your fo rom your browser's opt o show you form detai <u>oogle.com/chrome/</u> ) you also need to <u>ydetail/bfbameneiokkg</u> , a small "Gear" icon w	orm as well as the fo tions. However, a mu ls. For this, you wil o install the We bdmiekhinmfkcnldh vill appear next to th	rm name itself. You uch quicker and effe I need to download be Developer Tou hm). Once you he address bar as sh



7. Click on th	e forms ta	b and you wil	l be presente	ed with an a	rray of opt	ions. Click	'Display F	orm Det	ails'.
contact,	/							公 4	1
🖌 🖉 CSS	<b>Forms</b>	🔟 Images   🕕	Information	Miscellaneous	🥖 Outline	🛄 Resize	/ Tools	1 Options	
Clea	ir Radio Button	s	Display For	n Details		Make Form Fi	ields Writable		
Conv	vert Form GET	s To POSTs	Display Pas	swords		Populate Form	m Fields		
Conv	vert Form POS	Ts To GETs	Enable Auto	Completion		Remove Max	imum Lengths		
Conv Inpu	vert Select Eler its	ments To Text	Enable Forn	n Fields		View Form In	formation		-
8. The text r	next to ead	Figur ch form field	e 17 - The We	b Developer <sup>•</sup> e highlighted	<b>Toolbar Op</b> d. Each d	tions ata field r	name (den	oted by	/ 'name =
" <field>"') correct fie</field>	is require Ids.	d to be ente	red into the	target360	form for t	he data to	be corre	ctly plac	ed in the
< for	m action="/conta	act/#wpcf7-f77-p10-	o1" method="post"	name="form1">					
You	r Name (requi	red)							
<inp< td=""><td>ut name="your-n</td><td>name" size="40" type</td><td>="text"&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></inp<>	ut name="your-n	name" size="40" type	="text">						
Vou	r Email (roqui	rod)							
sinn	ut name="vour-e	•mail" size="40" type	="text">						
	ar name year a	and one to type	lost t						
Sub	ject								
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You	r Message								
<tex< td=""><td>tarea name="yoi</td><td>ur-message"&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tex<>	tarea name="yoi	ur-message">							
<inp< td=""><td>ut type="submit"</td><td>Send</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></inp<>	ut type="submit"	Send							
			Figure 18 - Sar	mple Form De	etails Panel				
9. On naviga described accurate t template o	ting back above. Or racking of can be assig	to <i>target360</i> ne of the mos data capture gned to news	, enter the t important t by tying a s letter data c	details to a fields in the pecific mear apture.	llow the s form is 'fo ning to a f	ystem to orm type' v orm type	correctly which allowers, the 'N	map the ws more ewslette	e data, as for more er Signup'
10. You will n data will n into <b>targe</b> t	eed to ent not capture <b>t360</b> . You r	er the details correctly. F must enter th	s captured fr or example ' e name from	om the We Name' need the form ex	b Develop ls to be co cactly as it	er tool ex prrect or it is (case se	actly as th will not ca nsitive).	ney appe apture a	ear or the ny details
		Form	Туре	Select:		-			
		Saluta	ation	Select:					
		Firstn	ame	Contact Downloa Newslett	Us ad ter Signup				
		Fig	ure 19 - Select	ting a target3	60 Form Ty	pe			



Ideal	ly your form shou	ld contain a first nam	ie and last na	me field. If h	nowever your form only contains a
name	e field you should	enter this in the last na	ame field.		
	▼ General				
	Name	form1			
	Form Type	Contact Us	-		
	Salutation		Busine	ss Phone	
	Firstname	-	Mobile	Phone	
	Lastname	your-name	Fax		
	Company		Websit	e URL	
	Job Title				
	Email	your-email			
	Description	your-message	Numbe	r of Employees	
	▼ Address				
	Street 1	-	State /	Province	
	Street 2		Zip / Pr	ostal Code	
	Street 3		Countr	v / Region	
	City		Count	y / negion	
12. Click	on 'Save' at the to	Figure 20 - The Fo	rm Capture Cor	ifiguration Fo	rm
13. Your	form will now app	ear in the list of form	Save capture config	gurations.	
	Form Capture (	Configurations: Active	e Form Capt	. •	1
	📃   Name 🔺			Created Or	n   2
	🕅 🍙 form1			16/12	2/2011 11:52
		Figure 21 - The Fo	orm Capture Co	nfiguration Gr	id



14. To ensure you have on the check the information of the check the ch	correctly configured the form capture it is advised to enter some test data and double on is captured into <i>target360</i> .
ſ	
	Your Name (required)
	Steven Kirk
	Your Email (required)
	steven.kirk@company.com
	Subject
	Social Media
	Your Message
	I am interested in learning more about social media.
Your message was see	nt successfully. Thanks.



15. Once you have submitted the form in a few minutes you will see a new lead has been created with the details you have just entered in your form. To access this button, click on '*target360*' and look under the 'My Work' menu heading.

, ,	target360 🛛 🔏 🖳 🙀 -	
	Alert System	
	<ul> <li>Alerts</li> <li>Reporting         <ul> <li>Dashboards</li> <li>Reports</li> </ul> </li> <li>My Work         <ul> <li>Activities</li> <li>Offline Activities</li> <li>Offline Activities</li> <li>Contacts</li> <li>Contacts</li> </ul> </li> <li>Leads         <ul> <li>Opportunities</li> </ul> </li> <li>Campaigns             <ul> <li>Campaigns</li> <li>Marketing Lists</li> <li>Email Activities</li> <li>Visitors</li> <li>Visits</li> </ul> </li> </ul>	
Figure 23	- The Lead button within the Navigation Pa	ane
Ta Steven Kirk Ia Figure 24 -	m interested in learning more ab David Small New The resulting Test Lead record within targe	16/12/2011 12:17 31 <b>:t360</b>
This concludes the walkthrough.		



# 2 Email Marketing

#### Marketing

Marketing is defined as a process by which an organization creates the communications and mechanisms to convince customers to purchase their products and/or services.

Marketing typically uses numerous communications routes such as email, digital (Facebook, LinkedIn etc.) and phone calls. These activities are typically grouped together into a campaign which encapsulates a focused effort to attract business to a specific product or perhaps even reconnect with established customers.

#### Marketing Lists

At the heart of this process is the marketing list which provides a convenient mechanism for grouping accounts, contacts or leads into a single managed list of potential customers.

The bringing together of Campaigns and Marketing Lists is the core of any effective marketing strategy within *target360*.

A campaign can contain numerous marketing lists.

#### Email Activities

Email Activities leverage a number of different components within *target360*. Each Email Activity brings together records from the following *target360* components:

- Campaigns
- Accounts, Contacts and/or Leads
- Marketing Lists
- Email Configs

The following sections describe each of these components and take you on a basic walkthrough to create some records of your own.

It is worth retaining the records created in each section as you may require them in subsequent sections.



# 2.1 What is Email Marketing?

### 2.1.1 Introduction

Email Marketing is the process of sending bulk emails to lists of customers or potential customers.

Marketing Lists are lists of Leads, Contacts or Accounts and can be Static or Dynamic.

Static	A list of Leads, Contacts or Accounts is generated to your criteria and added to the Marketing List. This list does not change unless you manually intervene to add or remove Customers.
Dynamic	A query is built to return a list of Customers. When the Marketing List is executed (i.e. An Email Activity is Sent) the query is run and the list of Customers is compiled at that moment.

Marketing Lists are consumed by Email Activities which allow you to compile an HTML Email and send it to many Leads or Contacts; automatically handle Bounces and Unsubscribes; record Opens and Clicks; obtain a list of Customers who clicked etc.

Email Marketing is the process of not only sending out email activities but also recording and enabling the analysis of the user response.



# 2.2 Leads

Sales leads are managed through *target360* via the 'Leads' button on the Application navigation pane as shown below.

				-	
https://redspired	emo.crm4. <b>dynamics.com</b> /main.aspx?Origin=	Portal&skiphotr D + C X	y Open Leads - Mi ×		11 1 2 2
		🕍 Microsoft Dynamics CRM			CRM Admin @ Redspire Demo
File Leads View Cha	ts Add Customize				Sign Out
New Edit Activate	rge Qualify Send Direct Add to Marketing	Assign Be-mail a Link + Report + Data +	Steppert to Excel ↓ Filter Advanced Find		
Records	Actions Collab	orate	Data		
target360 🚮 🙀 -	Leads: My Open Leads -			Search for records	٩
▲ Alert System	Name Name	Company Name Topic	City	Lead Status Status Reason	Created On 🗸 <
🚰 Alerts	🔲 🦓 Gordon Test01164	Redspire Gordon 10,000 Test 01164		New	19/09/2012 18:
4 Reporting	🔲 🦣 Gordon Test01165	Redspire Gordon 10,000 Test 01165		New	19/09/2012 18:
Reports	🔲 🍓 Gordon Test01166	Redspire Gordon 10,000 Test 01166		New	19/09/2012 18:
4 My Work	🔲 🍓 Gordon Test01167	Redspire Gordon 10,000 Test 01167		New	19/09/2012 18:1
Activities	🔲 🍓 Gordon Test01168	Redspire Gordon 10,000 Test 01168		New	19/09/2012 18:
Goffline Activities	🔲 🍓 Gordon Test01169	Redspire Gordon 10,000 Test 01169		New	19/09/2012 18:
🕒 Accounts	🔲 🦓 Gordon Test01170	Redspire Gordon 10,000 Test 01170		New	19/09/2012 18:
Sector Contacts	🔲 🌯 Gordon Test01171	Redspire Gordon 10,000 Test 01171		New	19/09/2012 18: 🔓
Concentration	🔲 🍋 Gordon Test01172	Redspire Gordon 10,000 Test 01172		New	19/09/2012 18:0 👼
	🔲 🍓 Gordon Test01173	Redspire Gordon 10,000 Test 01173		New	19/09/2012 18:
A Campaigns	🔲 🍓 🛛 Gordon Test01174	Redspire Gordon 10,000 Test 01174		New	19/09/2012 18:
Marketing Lists	🔲 🍓 Gordon Test01175	Redspire Gordon 10,000 Test 01175		New	19/09/2012 18:
Email Activities	🔲 🍓 Gordon Test01176	Redspire Gordon 10,000 Test 01176		New	19/09/2012 18:
🚳 Digital Activities	🔲 🍋 Gordon Test01177	Redspire Gordon 10,000 Test 01177		New	19/09/2012 18:
Analytics	🔲 🍋 Gordon Test01178	Redspire Gordon 10,000 Test 01178		New	19/09/2012 18:
8 Visitors	🔲 🍓 Gordon Test01179	Redspire Gordon 10,000 Test 01179		New	19/09/2012 18:
Visits	🔲 🍓 Gordon Test01180	Redspire Gordon 10,000 Test 01180		New	19/09/2012 18:
	🔲 🍓 Gordon Test01181	Redspire Gordon 10,000 Test 01181		New	19/09/2012 18:
	🔲 🍓 Gordon Test01182	Redspire Gordon 10,000 Test 01182		New	19/09/2012 18:
🔀 target360	🔲 🌯 Gordon Test01183	Redspire Gordon 10,000 Test 01183		New	19/09/2012 18:1 🖵
settings360	<u>    [</u>				•
- setungs500	1 - 250 of 5000+ (1 selected)				🕅 🖣 Page 1 🕨
Settings	All # A B C D	EFGHIJKL	M N O P Q	R S T U V W	X Y Z

Figure 25 - My Open Leads

### 2.2.1 Lead Creation

A new lead can be created by either importing existing leads or by clicking on the 'New' button in the Ribbon bar as shown below.



If you have set up web tracking, Leads will also be generated automatically by users of your web site who chose to fill in your online forms.



An empty Lead form is shown below.

	de 196 cum la humanica cu	n (main ann 2 cha C		X			
nttps://targebook	lev186.crm4.dynamics.com	n/main.aspxrete >-		Leads: Open	Leads - Microsoft	🏄 Lead: New - Microsoft Dyn 🚿	
File Land Add Custor			A Microso	ft Dynamics CRM			David Small 🤎
File Lead Add Custon	nize						turgetsouter 55
Save & New X Delete	Add to Marketing Assign	Sharing ↓ Copy a Link	Run Report +	Generate Tracking Code			
Save	Collabora	te	Data	Tracking Code			
Information General	Lead New					Leads	* 1
<ul> <li>Social Presence</li> <li>Visit</li> <li>Details</li> </ul>	Lead Source			Score		Owner <b>&amp;</b> David Small	
Notes & Activities     Preferences      Related      Common     Activities     Closed Activities     Audit History     Targeted Email Resp      Larget360     Alerts	<ul> <li>▼ General</li> <li>Topic *</li> <li>Salutation</li> <li>First Name *</li> <li>Last Name *</li> <li>Job Title</li> <li>Company Name *</li> <li>Web Site</li> </ul>				Business Phone Home Phone Mobile Phone Fax Other Phone		
Visitors Visitos Auditing Targeted Email Sends Targeted Email Errors Emails Opened Emails Clicked On Marketing	E-mail * Address Street 1 Street 2 Street 3 City				State/Province ZIP/Postal Code Country/Region Phone		
Campaigns	Status	Open	Cre	eated On		Created By	



Note
Required fields are highlighted with a red asterisk.
Optional Recommended fields are highlighted with a blue asterisk.

At the very least, a new Lead will comprise a Last Name, a Company Name and an Email Address.

It is desirable to also enter a First Name, a Topic and a Business Telephone number. The Topic would be the context / area of interest for the Lead although your business may appropriate this field for something that is meaningful to you.

Remember that these fields can be searched on using Quick Search and Advanced Find. Searching is of primary interest when creating Marketing Lists (covered in a later section of this manual).



### 2.2.2 Walkthrough: Create a Lead

In this walkthrough we will create a Lead.

1. To create a Marketing List you need to navigate to the 'Leads' section of *target360* on the Application navigation pane as shown below.

← → 🏄 https://redspired	emo.crm4 <b>.dynamics.com</b> /main.aspx?Origi	n=Portal&skipnoti 🔎 🗕 🖒 🗙 🏄 Leads: N	ly Open Leads - Mi 🗙		
		A Microsoft Dynamics CRM			CRM Admin @ Redspire Demo
File Leads View Chai	ts Add Customize	ing Assign ☆ Copy a Link , ☆ E-mail a Link , Run Impor Report , Data	Export to Excel Filter Advanced Find		Sign Out <sup>*</sup>
Records	Actions Coll	aborate	Data		
target360 👔 燥 🛛	Leads: My Open Leads -		Search	for records	Q
Alert System	Name Name	Company Name Topic	City Lead Status	Status Reason	Created On 🛛 😂 <
Alerts	🗐 🥎 🛛 Gordon Test01164	Redspire Gordon 10,000 Test 01164		New	19/09/2012 18:
Reporting     Dathboards	🔲 🍓 Gordon Test01165	Redspire Gordon 10,000 Test 01165		New	19/09/2012 18:
Reports	🔲 🌯 Gordon Test01166	Redspire Gordon 10,000 Test 01166		New	19/09/2012 18:
4 My Work	🔲 🌯 Gordon Test01167	Redspire Gordon 10,000 Test 01167		New	19/09/2012 18:1
Activities	🔲 🍋 Gordon Test01168	Redspire Gordon 10,000 Test 01168		New	19/09/2012 18:
💩 Offline Activities	🔲 🍋 Gordon Test01169	Redspire Gordon 10,000 Test 01169		New	19/09/2012 18:
Accounts	🔲 🍋 Gordon Test01170	Redspire Gordon 10,000 Test 01170		New	19/09/2012 18:
Sector Contacts	Gordon Test01171	Redspire Gordon 10,000 Test 01171		New	19/09/2012 18: 🔓
Leads     Opportunities	Gordon Test01172	Redspire Gordon 10,000 Test 01172		New	19/09/2012 18:
4 Campaigns	🔲 🍓 Gordon Test01173	Redspire Gordon 10,000 Test 01173		New	19/09/2012 18:
Campaigns	🔲 🍓 Gordon Test01174	Redspire Gordon 10,000 Test 01174		New	19/09/2012 18:
Harketing Lists	Gordon Test01175	Redspire Gordon 10,000 Test 01175		New	19/09/2012 18:
Email Activities	Gordon Test01176	Redspire Gordon 10,000 Test 01176		New	19/09/2012 18:
🚳 Digital Activities	Gordon Test01177	Redspire Gordon 10,000 Test 01177		New	19/09/2012 18:
Analytics	Gordon Test01178	Redspire Gordon 10,000 Test 01178		New	19/09/2012 18:
S Visitors	Gordon Test01179	Redspire Gordon 10,000 Test 01179		New	19/09/2012 18:
Visits	Gordon Test01180	Redspire Gordon 10,000 Test 01180		New	19/09/2012 18:
	Gordon Test01181	Redspire Gordon 10,000 Test 01181		New	19/09/2012 18:
	Gordon Test01182	Redspire Gordon 10,000 Test 01182		New	19/09/2012 18:
🔀 target360	Gordon Test01183	Redspire Gordon 10,000 Test 01183		New	19/09/2012 18:
settings360	4				•
	1 - 250 of 5000+ (1 selected)				I¶ ◀ Page 1 ►
Settings	All # A B C D	EFGHIJK	. M N O P Q R S	T U V W	X Y Z
Click on the 'l	New' button on the F	Figure 27 - The Lead	s Grid		



3. Enter the new	w Lead's details:							
T. General								
Topic <sup>+</sup>	Company Funct 2012							
Topic	Company Event 2012							
Salutation	Business Phone							
First Name *	John	Home Phone						
Last Name *	Smith	Mobile Phone						
Job Title		Fax						
Company Name *	Acme Trading Co.	Other Phone						
Web Site								
E-mail *	jsmith@acme.com							
	Figure 28 -	The General Section of the Lead Form						
4. Click on the " NOTE: You can fin	Save' or 'Save & Close' but	tton on the Ribbon to add the record to <b>target360</b> .						
Leads: Search Results -		Company Event 2012 ×						
Topic	Name	Company Name   Status Reason   Business Phone   E-mail 🖉 <						
Company Event 2012	John Smith							
	Fi	gure 29 - Using Quick Search						
This concludes the You can keep the	e walkthrough. created Lead for use in lat	ter walkthroughs if you wish and by all means add some more.						



# 2.3 Marketing Lists

### 2.3.1 Marketing List Creation

Marketing Lists are managed through *target360* via the 'Marketing Lists' button on the Application navigation pane as shown below.

														- 0	×
< 🔿 🏄 https://target360	dev186.crm4.	dynamics.c	om/main.aspx	÷ ,0 +	≙¢×	👍 Mark	eting Lis	ts: My Act	ive ×					<b>^</b>	* \$
				4	Microsoft D	ynamics CF	M					/	ta	David Sm arget360c	all 🕜 lev
File Marketing Lists Viev	N Charts	Customiz	e											Sign C	ut 🐣
New Edit Activate	Create Quick Campaign	Copy Marke	ting Add to Campaign	Assign	Copy	a Link 🖵 I a Link 🖵	Run Report	Import Data	Export ▼ Filter	to Excel	Advanced Find				
Records		Actions			Collaborat	e			Data						
target360 🛛 🟠 🙀 -	Marketin	g Lists: 🛚	y Active Ma	rketing	Lists 🗸					[					٩
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Reporting     Dashboards     Reports														-	Click here
<ul> <li>My Work</li> <li>Activities</li> <li>Offline Activities</li> <li>Accounts</li> <li>Contacts</li> <li>Leads</li> <li>Opportunities</li> </ul>															to view the chart.
Campaigns     Campaigns     Campaigns     Marketing Lists     Email Activities     Digital Activities															****
Analytics														-	
₩ target360															-
🐔 settings360	1 - 23 of 23	(0 selected)											- H - 4	Page 1	
差 Settings	All #	A B	C D E	F G	H I	J K	LI	A N	O P C	2 R	S T	U V	w x	Υ	2

Figure 30 - The Marketing Lists Grid

You will also see the option to add Marking Lists within Campaigns, Email Activities and Campaign Activities. During this process you will also have the option to create a new Marketing List.


As a minimum, you are required to provide a Name, a Member Type (Account, Contact or Lead) and a Type (Static or Dynamic).

▼ General			
Name *	My First Marketing List	Member Type *	Lead 🔻
Туре*	Static C Dynamic		

#### Figure 31 - New Marketing List Form

Name	The name of the Marketing List.
	Name * My First Marketing List
	This should be brief and encapsulate the function of the Marketing List.
Member Type	A Marketing List may contain only a single type of contact:
	<ul> <li>Account – A company</li> <li>Contact – An existing customer</li> <li>Lead – A prospect</li> </ul>
	Member Type * Account Contact Lead
	Of course, a Campaign can contain numerous Marketing Lists should you need to combine contacts.

You are also able to populate a number of optional fields should you wish to do so.

Source	Where you got the list.
Cost	If you bought the list, how much it cost.
Description	Any details you wish to record about the list that does not fit into any other fields.

You need to save the record before you can begin adding Contacts or Leads to the Marketing List.



target360 gives you multiple options to find members to add to a Marketing List.



Figure 32 - Manage Members Form





#### 2.3.2 Walkthrough: Create a Static Marketing List

In this walkthrough we will create a Static Marketing List. To create a Marketing List you need to navigate to the 'Marketing Lists' section of target360 on the Application navigation pane as shown below. July https://target360dev186.crm4.dynamics.com/main.aspx# P → A C × Marketing Lists: My Active ... × n 🛧 🌣 ← 🔌 Microsoft Dynamics CRM Da vid Small 🕜 Marketing Lists View Charts Customize File Export to Excel Activate 💭 Share × 20 -0 33 ñ i Snare **Filter** Edit Assign E-mail a Link - Report - Data -New Create Quick Copy Marketing Add to Campaign List Campaign Advanced Find 🗙 Delete 🗸 Records Actions Collaborate Data target360 🚺 🙀 -Marketing Lists: My Active Marketing Lists -Г Alert System 🔲 🛛 Name 🔺 Type Member Type Last Used On Purpose 🚰 Alerts 4 Reporting 🔡 Dashboards 🔮 Reports Mv Work Activities Offline Activities Accounts 🧕 Contacts 🍋 Leads Opportunities 4 Campaigns 🚰 Campaigns Harketing Lists Email Activities 🚳 Digital Activities





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Marketing Lis Big Event	t Lead List				Marketing Lists 🔻	<b>☆</b> ₹
Modified On	05/11/2012 16:13	Last Used On		Owner	§	
▼ General						
Name *	Big Event Lead List		Member Type *	Lead		-
Type *	€ Static C Dynamic					
Purpose						
Source			Modified On	05/11/2012	16:13	$\sim$
Currency	Pound Sterling	Q				
Cost	£		Last Used On			₩v
Locked	lt C		Owner*	2	6	

We have chosen a Member Type of Lead and a Marketing List Type of Static.

We are now going to 'Use Lookup to add members'.

Click on 'Marketing List Members' to add contacts to the new Marketing List.

Manage Members & Remove from Marketi	ng List Actions	Add to	Anothe	er Marketi Manage N	ng List Nembe	E- rs We	opy a Lin -mail a Lii bpage D	k Set alog	As Defau			Start X	Run	Exp o	ort Ma Men Data	rketing nbers	List		
Information General Notes Related ▲ Common Big Marketing List Members Marketing List Members Marketing Campaigns Arketing Quick Campaigns A Processes	4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Marketin Big Ev Modified Iarketin Name	M: Sel ma	Anage M lect how y rketing list How € €	do you do you Use Lo Find m Use Ad Find m Use Ad Evaluat search	rs tit to find want to okup to embers t wanced I embers t vanced I embers t embers t e	i custome find men add men o add to o add to o add to o add ba o add ba o add ba o add ba o add ba o add ba o add to rind to re move sind to re members i find to re members i fi	nbers? bers? d memi ed on s nove m based o aluate r to keep e marke	d or remov g list. earch crite embers n search d in the ma ting list.	ria. riteria.	IIST Dase	f this d on	st	Owner Sea	rch fo	r recor	seting Li S ds reated (	sts David	▼
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	All Status	# A	В	C D	E	FG	Н	IJ	K L	М	N O	Р	Q R	S	Т	U	V V	v x	ΥZ
ect 'Use Lookup to a	add mi	emb	ers'	and s	Loc	ct 'No	ext'. to ac	d m	embe	19									



-	appear with a search box. Enter what this case the search was carried out on	you wish to search on, for exampl Topic.	e: company name, city,
	Search:	2	
Enter what yo	u wish to search for then click on the n	nagnifying glass.	
	Look for: Lead View: Lead Lookup View Search: Company Event 2012	Show Only My Records	
	Name 🔺	Τορίς	Comt
	John Smith	Company Event 2012	Acme Tr
<i>target360</i> wil each of the lea	I return all results that contain the in ads individually or select them all.	formation you have searched for.	Page1 > You can then highlight
		1	
Name	: ▲ Cutith	Topic	Comp 🔁
V Name	e ▲ Smith	Topic Company Event 2012	Com; 🖉
V Name	e ▲ Smith	Topic Company Event 2012	Com; 2
✓ Name ✓ John I -1 of 1 (1	selected)	Topic Company Event 2012	Com;₽ Acme Tr Acme Tr
Vame Value John 1 - 1 of 1 (1 Click Add and	selected)	Topic Company Event 2012	Com;₽ Acme Tr I 4 Page 1 ►



Click New. The market	ng list will now be created.						
ſ	Adding Members to Marketing List Webpage Dialog						
	https://radicalbluedemo.crm4.dynamics.com/_grid/cmds/dlg_add						
	Adding Leads You have selected 100 Leads to add to the Marketing List.						
	UK. Cancel						
	Search Internet   Protected Mode: Off						
Click on the 'Save' or 'Save & Close' button on the Ribbon to commit the record to <b>target360</b> .							
Marketing Lists: Search	Results - Big Event Lead List	×					
Name 🔺	Type Member Type Last Used On Purpose 2	<					
🔲 💒 Big Event Lead List	Static Lead	link he					
This concludes the wal	Figure 34 - Using Quick Search kthrough.						



# **2.4 Email Configuration**

### 2.4.1 Email Config Creation

The email configuration file tells **target360** how to configure each email that is sent from an Email Campaign. For example, it is here that you configure the "From" email information since marketing emails are generally sent from a department or organisation alias.

To administer Email Config records, the following steps should be followed:

1. Navigate to settings360.



2. Select 'Email Configs' from the left menu under the 'Email Campaign' heading, as shown below. You will see a list of all the current configuration files and you will have the option to create a new one.

setti	ings360	🔂   (	<b>⊋</b> ∙
<b>₄</b> Ema	iil Campaign		
à	HTML Template	es	
đ	Email Configs	>	
₄ Web	o Analytics	iii	
6	Lead Score Co	nfigurations	
G	Form Capture	Configuratio	ns

To create a new Email Config record, click the 'New' button on the Ribbon.

<b>RB</b>	the second se	
+ 🕞 🌽 https://redspired	lemo.crm4.dynam 🔎 👻 🗎 🖒 🗙 🏄 Email Configs: Active Email 🗵	6 ☆ 🕸
	Microsoft Dynamics CRM	CRM Admin @
File Email Configs View	Charts Customize	Sign Out
New Edit X Delete - Records	Assign     Geopy a Link - Assign     Email a Link - Run Import - Collaborate     Email a Link - Run Import - Data     Export to Excel Filter Advanced Find	
settings360 🛛 🟠 🙀 -	Email Configs: Active Email Configs -	Search for records
▲ Email Campaign	Name 🔺 Created On	2 <
Solution Configs	🔲 👌 Sales Team 15/03/2012 15:21	10
Email Configs		입
🍐 Targeted Email Errors		( her
4 Web Analytics		e l
Digital Routes		view
🍐 Form Capture Configura		the
Administration     Avisit End		, char
Overnight Scores		
Error Logs     Sand Comminent		
4 Dynamics		
🗃 Imports		
₩ target360		
差 settings360	1 - 6 of 6 (0 selected)	4 ◀ Page 1 ▶
🗵 Settings	AII # A B C D E F G H I J K L M N O	PQRSTUVWXYZ

Figure 35 - The Email Config Grid



Once the form has opened you can fill in the necessary fields.

File Email Config		radicalbluedemo 🚕
Save & New Save & Save & New Save & Close Save	Sharing - Copy a Link E-mail a Link Collaborate Colla	
Information	Email Config	Email Configs 👻 🕸 🔻
Related	▼ General	
Common     Audit History     Campaign Activities     Processes     Workflows     Dialog Sessions	Name* From Name* From Address* Reply-To address On Behalf of Name On Behalf of Address	Owner* S Dave Burrell

#### Figure 36 - Email Config Form

Name	The Name field serve easily identify what /	es no functional purpose other than allowing you to who each email configuration is for.
	Name *	Sales Team
From Name	This is the name that can be set as a compa	appears to the recipient of a marketing email. This any name or an individual's name.
	From Name *	Sales Team
From Address	The email address yo must be an actual add	bu wish to appear as the source of the email. This dress owned by your company.
	From Address *	noreply@acme.com



In addition to the required fields you can also set the following:

]

Deply To Address	If you wish the realize to go to a different small address then which the
Reply-10 Address	In you wish the replies to go to a different email address than which the
	emails were sent.
On Behalf of name	If you wish the email name or address to appear as if it is sent on behalf
	of somebody else.
On Behalf of	If you wish the email name or address to appear as if it is sent on behalf
Address	of somehody else
Address	of somebody cise.



### 2.4.2 Walkthrough: Create an Email Config

In this walkthrough we will create an Email Config record.

1. To create an Email Config record you need to navigate to the 'Email Configs section of *target360* on the settings360 Application navigation pane as shown below.





3. Enter the mandat	ory Email Conf	ig record details:	
← → ¼ https://target360d	ev186.crm4. <b>dynamics.con</b>	n/main.aspx?etc 🔎 👻 🚔 🖒 Email Configs: Active Email C 🏄 Email Config: New - Micro 🗴	<b>↑</b> ★ ₽
File Frail Confin		🕍 Microsoft Dynamics CRM	David Small @
Save & New Save & Save & New Save & Close	Assign	Run Report -	
Information	Email Config	Email Config	
General	New	Email Cornig	
Related	▼ General		
Common     Audit History	Name *	Walkthrough Owner*	
Email Activities	From Name *	My Company	
Processes	Reply-To address	info@mycompany.com	
	On Behalf of Name		
	On Behalf of Address		
	Status	Active	
(C		Figure 38 - Email Config Form	
4. Click on the 'Save	' or 'Save & Clo	se' button on the Ribbon to add the record to <b>target360</b> .	
		THE REPORT OF	
		Save Save &	
		Close	
This concludes the wa	lkthrough.		



# 2.5 Campaigns

Everything within *target360* revolves around the creation and execution of campaigns. Campaigns are used to track all your activities as well as the budgets and costs associated with them. The first stage of this process is to create a campaign.

https://target360	0dev186.crm4.dynamics.com/main.aspx# 🔎 👻 🚔 🖒 🗙 🏄 Campaigns: My Campaigns 🗙 🔤	<b>↑</b> ★ ☆
File Campaigns View	Microsoft Dynamics CRM Charts Customize	David Small ⑦ target360dev Sign Out
New New Template	tivate eactivate eactivate elete •	
Records	Collaborate Data	
target360 🚮 🙀 -	Campaigns: My Campaigns -	۹
▲ Alert System	Name 🔺 Template Status Reason Created On	2 <
Alerts	Campaign No Proposed 29/08/2012 10:05	
4 Reporting	Reference in the second	<b>₽</b>
Dashboards	Test Campaign 2 No Proposed 19/10/2012 16:15	유
	Test Campaign 3 No Proposed 22/10/2012 10:21	lere
Activities Offline Activities Accounts Contacts Leads Opportunities	The Big Event No Proposed 05/11/2012 10:23	o view the chart.
Campaigns     Campaigns     Campaigns     Marketing Lists     Email Activities     S Digital Activities		
Analytics     S     Visitors     Visits		
🗎 target360		
settings360	1 - 5 of 5 (0 selected)	M A Page 1 >
🛃 Settings	AII # A B C D E F G H I J K L M N O P Q R S T U V W	XYZ

### 2.5.1 Campaign Creation

Campaigns are simple containers for Email Activities, Digital Activities and Campaign Activities.

Each Campaign needs, as a minimum, a Name and a Proposed Begin and End Date.





Below is an example of the Campaign form.

Campaign Code	CMP-01018-Q9S4Q2	Total Cost of	£0.00	Owner	🔱 David Small
		Campaign			
ieneral					
ame *	The Big Event		Status Reason	Proposed	•
ffer					
chedule					
oposed Begin Date	05/11/2012		Actual Begin Date		
oposed End Date *	05/12/2012		Actual End Date		
escription					
ublicise out Big Ever	nt via email and social media.				

#### Figure 39 - The Campaign Form

The first required field is the campaign name. Ideally this should be something that will allow a campaign to be easily identified and should encapsulate the function of the campaign.

The 'Description' field will allow colleagues to see what the objectives of the campaign are if the campaign creator or organiser is absent as shown in the figure below.

Description			
Description	My Marketing campaign to	multiple sectors re marketing automation	
<ul> <li>Financials</li> </ul>			
Financials			
Total Cost <mark>o</mark> f Campaign Activities	£	Budget Allocated	£
Miscellaneous Costs	£	Estimated Revenue	£
Total Cost of Campaign	£		

#### Figure 40 - New Campaign Form (bottom)

Financial information (useful Return on Investment for reporting) can also be specified:

- Miscellaneous Costs
- Budget Allocated
- Estimated Revenue



The cost of the campaign activities and total cost of campaign are automatically generated based on the financial values that are assigned to each activity created against the campaign.

Campaign details can be edited later if required.



### 2.5.2 Walkthrough: Create a Campaign

In this walkthrough we will create a Campaign.

1. To create a Campaign you need to navigate to the 'Campaigns' section of *target360* on the Application navigation pane as shown below.

Campaigns View	dev186.crm4 <b>dynamics.com</b> /main.asp Charts Customize	×ギーク マ 音 さ × Mar Ca	mpai × 👍 S CRM	Solution: D	Campaign: 🛃 Dig	ital Acti în David 1 target36 Sign	∃ X ★ X Small @ odev n Out ^
New Template	ivate activate ete •	Run Report - Data -	o Excel Advance Find	ed			
Records	Collaborate	Data					
target360   🏠   🐺 -	Campaigns: My Campaigns	-					م
Alert System	Name 🔺	T	mplate	Status Reason	Created On		2 <
Alerts	🔲 🚰 Campaign	N	0	Proposed	29/08/2012 10:05		1
Reporting	Test Campaign	Ν	0	Proposed	19/10/2012 15:44		0
Reports	Test Campaign 2	N	0	Proposed	19/10/2012 16:15		
My Work	Test Campaign 3	N	•	Proposed	22/10/2012 10:21		aret
Campaigns Campa							
target360							
settings360	1 - 5 of 5 (0 selected)					M 🖣 Page 1	1 1
E Settings	AII # A B C D E	FGHIJ	K L M N	I O P Q	R S T U	V W X Y	Z
Figure 41 - The Campaign Grid Click on the 'New' button on the Ribbon:							
		New					



3.	Enter the new C	ampaign's details:				
<b>-</b>	- General					1
	Name *	The Big Event		Status Reason	Proposed <b>•</b>	
	Offer					
	Schodulo					
	scheuule					
	Proposed Begin Date	05/11/2012		Actual Begin Date		
	Proposed End Date *	05/12/2012	•	Actual End Date		
	Description					
		Figur	re 42 - L	ead Details		
4.	You can also ent	er the budget and target for	the Ca	mpaign.		
	▼ Financials					
	Financials					
	Total Cost of Campaign Activities	£		Budget Allocated	£ 500.00	
	Miscellaneous Costs Total Cost of	£ 120.00	_	Estimated Revenue Currency *	£ 2,000.00	
	Campaign	<u>_</u>				
5.	Click on the 'Sav	Figure e' or 'Save & Close' button o	e 43 - Le n the R	ad Financials Ribbon to add th	e record to <b>target360</b> .	
		l	Save	Save & Close		
NOT	E: You can find t	he record by entering 'The Bi	ig Even	it' into the Quic	k Search box.	
Can	npaigns: Search R	esults 🗸			the big event	×
	Name 📥	Ter	mplate	Status Reason	Created On 🖉	<
	The Big Event	No	)	Proposed	05/11/2012 10:23	<del></del> click h
		Figure 4	4 - Usin	g Quick Search		
This The	concludes the w next step would	alkthrough. You can keep th be to create a Campaign Act	ivity.	paign record fo	r use in later Walkthroughs if you wis	sh.



# 2.6 Email Activities

Email Activities are managed in *target360* from within a Campaign record. They are also directly available from the main navigation menu if you prefer.

					×
< i> 📈 https://target360d	lev186.crm4. <b>dynamics.com</b> /main.as	px# 🛛 🖓 👻 🔒 🖒 🗙 🏄 Email Activities: Active Ema	a ×	<b>î</b>	★ 🌣
		A Microsoft Dynamics CRM		David Sm target360	iall ⊘ dev
File Email Activities View	Charts Customize			Sign C	ut ^
New Edit X Delete -	Assign E-mail a Link • Run Report				
Records	Collaborate	Data			
target360 🚮 🙀 -	Email Activities: Active Emai	l Activities 👻	Search for record	ds	9
▲ Alert System	Campaign	Subject 🔺	Progress	Deliveries	<b>3</b> , <
🛃 Alerts	🕅 🖂 Campaign	mGears Test	Campaign Sent Successfully	150	- 🔒
4 Reporting	🔲 🖂 Campaign	MGears Test - 2	Campaign Sent Successfully	100	2
Dashboards	🔲 🖂 Campaign	ASYNC TEST	Campaign Sent Successfully	1	<u> </u>
Reports	🔲 🖂 Campaign	Async Test DEV	Processing Send Campaign		lere
Activities	🔲 🖂 Campaign	Async Test DEV 2			5
Offline Activities	🔲 🖂 Campaign	Azure Test	Campaign Sent Successfully	145	view
Accounts	Campaign	Azure Test - No Html Code			÷.
Sector Contacts	🕅 🖂 Campaign	Azure Test - No Marketing Lists			÷.
🕦 Leads	🔲 🖂 Campaign	Azure Test 10,000	Campaign Sent Successfully	40,000	, F
Opportunities	🔲 🖂 t360C001	Consonant or a Vowel?	Campaign Sent Successfully	3	
4 Campaigns	🔲 🖂 🛛 target360 Administrator Tes	CRM Administrator Test Email Activity	Campaign Sent Successfully	1	
Campaigns	🔲 🖂 Campaign	Friday 12:45	Campaign Sent Successfully	1	
Imail Activities     Digital Activities					
S Visitors					
🔀 target360					-
😢 settings360	◀ 1 - 88 of 88 (0 selected)			ki di Parre 1	
Settings	All # A B C D	EFGHIJKLMNO	PQRSTUV	W X Y	z

Figure 45 – The Email Activities Grid on the main navigation menu

### 2.6.1 Email Activity Creation

Email Activities are created as part of a Campaign.

In order to save an Email Activity you must provide a Campaign, an Email Config and a Subject.

Campaign	The Campaign to which the Email Activity is associated. This field may be populated for you automatically.
Email Config	Allows for the configuration of the From, Reply To and On Behalf Of email addresses and display names that will be used in the resulting emails.
Subject	A meaningful title for the Email Activity.

Once the campaign activity record is saved you will be able to add one or more Marketing Lists and also Email Content (the body of the email message).



Note You cannot send a Test Email nor can you send your Email Campaign without at least one Marketing List and Email Content.

#### The New Campaign Activity form is shown below.

Email Activity		Email Activities	* ±	*
New				
Progress				
▼ General				-
Campaign *	Email Config*		Q	
Subject *				
Finance				
Budget Allocated	£ Actual Cost £			
Scheduling				
Schedule?	No			
Marketing Lists				
Name	Type Member Type Last Used Or	n Purpose		
	To apple this soptant, says the second			
	to enable this content, save the record.			
				-

Figure 46 - The Email Activity Form

Any budget and cost values will be included in ROI reporting.

To send a test email, send the emails or to add email content, you need to use the buttons within the Ribbon bar:



Send Test	Send a test email. You will be asked for an email address for the sample email to be sent to. A SPAM score will be computed as well as allowing you the opportunity to review a real copy of the email.
Send Email	Send the email. The emails will be compiled and sent immediately unless you elected to schedule the email activity for a future date or time.



Edit Content	The "Edit Content" button opens the built-in, HTML Email Content Editor
	in a new browser window allowing you to construct your marketing
	email.

Although it is not mandatory, you should send a Test Email to yourself before you send the full email to your Marketing List. This will allow you to check the formatting, spelling etc. Also, you will be provided with a SPAM score which will allow you to evaluate your content and the quality of the email being sent.

Clicking on the "Send Email" button will send the Email Activity to your Marketing List immediately. This cannot be undone so you should be sure that you have tested the look and feel of your email.

If you have elected to Schedule the email activity, the emails will be held within *target360* until the date and time that you have specified.



# 2.6.2 Walkthrough: Create an Email Activity

In t	his walkthrough we	will create an Er	mail Activity for a fi	ictional event.		
1.	To create an Email navigation pane. ( have to hand).	Activity you shc Open the Campa	ould navigate to the ign you created in	e 'Campaigns' sect the previous Wall	tion of <b>target360</b> kthrough (or any	on the Application test Campaign you
	Click on Email Activ	vities in the navi	gation menu of the	e Campaign form.		
	Contract 360d	ev186.crm4.dvnamics.com/m	ain.aspy?etc Q - A C X	Campaigns: My Campaigns	Campaign: The Big Event	
ſ		List Tools	A Microsoft Dynam	nics CRM		David Small @
	File Campaign Add Co Add New Email Edit Activity Edit	ustomize Email Activities e 🔀 Bulk Delete rate Email Activity	Assign Email Activities	Filter	View Set As Default Chart View	Run Export Email Report + Activities
	Record	ls	Collaborate	Current View	View	Data
	Information - General - Financials	Campaign The Big Even Campaign Code	t CMP-01018-095402 Total	Cost of f0.00	Camp	aigns 👻 🛊 🐺
	L Notes	cumpagn couc	Camp	paign		
	Related	Email Activities:	mail Activity Associated Vie	ew 🔻	Program	
	<ul> <li>Planning Activities</li> <li>Campaign Activities</li> <li>Audit History</li> <li>Digital Activities</li> <li>Instant Activities</li> <li>Visits</li> <li>target360</li> <li>mailBlast Responses</li> <li>mailBlast Errors</li> <li>Marketing</li> <li>Target Marketing Lists</li> </ul>				No Email .	Activity records are avai
	Processes					-
		● 0 - 0 of 0 (0 selected)				► III ● Page 1 ►
		All # A B C		JKLMNO	P Q R S T U	V W X Y Z
		Status	Active No of Campaign Activiti	itics from within a (		.000 11
2.	Click on the 'Add N	lew Email Activit	y' button on the Ri Add New Activit	ibbon: Email	ani ya Bu	



3. Enter the mandat	ory Email Activ	ity details:					
		🕌 Micro	osoft Dynamics CRM			Dav	vid Small 🙆
File Email Activity Custon					targ	et360dev 🛆	
Save & New Save & New Save & Delete Close Save	A B Send Send Content Targeted Email	Assign Copy a Link Collaborate	Run Report - Data				
	Empil Activity					-	
General	New					Email Activities	- 2 4
- Email Content - Spam Report	Progress						
Related	▼ General						
4 Common	Campaign *	The Big Event	Q	Email Config*	👌 <u>Walkthroug</u> t	1	
Audit History	Subject *	Come to the Big Event.					
Harketing Lists	Finance						
Visits	Budget Allocated	£		Actual Cost	£		
▲ Sales	Scheduling	1			,		
Contacts that Opened	Schedule?	No	•				
	Marketing Lists						
Leads that Opened	Name		Tupe	Mamb	ar Turpa 👘 Last Usar	d On Burnore	
🚳 Leads that Clicked	Name		Туре	Memb	er type   Last Osed	a On   Purpose	
Create a new Email Co Email Config record th	onfig record if at we created i	there is not a s	uitable one lkthrough.	already pres	sent. In this	s case we ha	ive used an
4. Click 'Save' to save	e the record.		Save				
NOTE: Once you have	saved the reco	rd, you will be a	able to confi	gure the Ma	irketing List(	s) and Email	Content.
You must always save	the record in o	rder to progres	s to these se	ections of th	e Email Activ	vity.	



5.	A Li	dd a Ma ist" butto	rketing List by clicking on the Marketing Lists Grid and clicking on the "Add Existing Marketing on in the ribbon.
	Ι	Marketin	a Lists
			ame é Last Heed On Russore 🖉
			No Marketing List records are available in this view.
		0 - 0 of 0	) (0 selected) M
			Add Existing Marketing List
6.	S E	earch foi vent Lea	r an existing Marketing List or create a New Marketing List. In this case we have used the "Big d List" as created in an earlier walkthrough.
			E Look Up Records Webpage Dialog
			Look Up Records
			columns of data by using the View options. Repeat this process for different types of records.
			Look for: Marketing List   Show Only My Records
			View: Marketing List Lookup View
			Search: big event lead ×
			Name Type Purpose Member Type 🖓
			🕅 🔁 Big Event Lead List Static Lead
			1 - 1 of 1 (1 selected) H ◀ Page 1 ►
			Selected records:
			Add Remove
			Properties <u>N</u> ew
			<u>Q</u> K <u>C</u> ancel
			https://target360dev186.crm4.dynam 🗸 Trusted sites   Protected Mode: Off
Not	tice	e that w	e were able to search for the list item by name and that we then click on the "Add" button to

Notice that we were able to search for the list item by name and that we then click on the "Add" button to include the list in the "Selected Records" section.



NOTE: That we could add multiple Marketing Lists in the previous dialog box and that also those lists could contain different types of customers. In this way we can send to Leads and Contact from within a single Marketing Activity. Our Marketing List has now been added to the Email Activity. Marketing Lists 3 Name 📥 Туре Member Type Last Used On Purpose 📃 🐏 🛛 Big Event Lead List Static Lead 1 - 1 of 1 (0 selected) 🖊 🖣 Page 1 🕨 7. Click on the "Edit Content" button in the Ribbon. Edit Content 8. You will now be presented with a pop-up browser window containing an HTML Editor. Here we can compile out email template. \_ 🗆 🗙 🥖 http://apps.target360.com/htmleditor.aspx?fullscreen= ♀ - 🗟 ♂ × 🛛 🥖 HTML Editor ሰ ★ 🌣 × 🖌 🗋 🤹 🗞 🟈 🍄 | 🐰 ங 九 🍓 🍓 🏷 🕐 🕐 壽 🔚 📴 🍳 Ω 🧐 🚔 🛄 🖬 🖉 🖉 💆 📲 [三 三 谭 谭 ×' ×. 🖦 淼 淼 👔 🚍 ∞ 👾 🔱 🖏 🖬 🖬 😽 🕅 Paragraph • Default Font • Size • Links • CRM Fields • Zoom • Normal HTML OPreview Words:0 Characters:0 Figure 49 - The HTML Editor



Click on the "Insert Templates" button to add a pre-built email template.	
0. The Insert Templates dialog will open.	
Insert Templates	
🚰 /templates/target360dev186/	-
Name     Size     Click here if you are having trouble	
DS-HTML_Template.html 448 B   Image: DS-HTML_Template.html 6.04 KB   Image: modern.html 5.76 KB   Image: modern.html 5.76 KB   Image: modern.html 5.76 KB   Image: modern.html 5.76 KB   Image: modern.html 8.10 KB   Image: modern.html 8.36 KB   Image: modern.html 8.	
Upload (Max file size allowed 1,000.00 KB ) Upload Max Upload folder size is: 100.00 MB. Used: 33.34 KB	
Insert Cancel	
n this screen you can select a pre-existing email template, upload an email template of your owr nodify an existing email template to closer match your needs.	devising or

For this example you can select any template and click the "Insert" button.



11. Inspect and modify the email content.
(←)
▋〕 ④ & ₦ ◀ ♥ ⋡ ங & ■ ■ ■ ★ × ゥ ┍ № 請 岩 ◙ ◎ Ω ♀ 号 ☆ □ ■ Β Ⅰ ⊻ ⋿ ≡ ≡ ■ ⊿ ▲ • थ •
[[] [] [] 律 律 x' x, abs 않 않   ≡ ∞ ※ ψ 13 酉 ┗ ┗ ⅲ h* b*
Normal • Default Font • Size • Links • CRM Fields • Zoom •
Click nere ir you are naving trouble viewing this message.
Title Goes Here
Lorem ipsum dolor sit amet, consectetur
ornare eu viverra ante eleifend.
Vivamus massa urna, rhoncus vitae rhoncus blandit, tellus sed pretium aliquet, dui felis
blandit nunc, nec varius nisi lorem ac leo.
Quisque eu mauris velit. Nunc vehicula,
cursus gravida lacus, hec accumsan elit aliquet pharetra. Quisque sollicitudin, felis ac
dapibus convallis, sapien est commodo turpis, a euismod orci orci a tellus. Phasellus pharetra molestie purus vel auctor. Nulla ornare turpis quis justo imperdiet vestibulum.
Article Title Goes Here
Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Duis ullamcorper fermentum dolor, vel conque odio venenatis quis. Nunc et ultricies ipsum.
Pellentesque auctor gravida mi eget dapibus. Mauris ac ante risus, ut porttitor augue.
Words:302 Characters:2110
You can add standard "Links" such as Unsubscribe and add CRM Fields such as "First Name" and "Last Name".
Links   CRM Fields
Links and Fields are automatically replaced with real data from the Lead or Contact record when the email is sent.
12. Click on the save button when you are finished.
You can return to modify the email at any time prior to sending the email activity.
13. The pop-window will display a message once it has saved and you can now close it or click on the link to continue editing.
HTML Code Saved to Email Campaign
Click Here to Edit again



14. The Email Activity w	ill update to show the new email template.
+ A https://target360dev	186.crm4.dynamics.com/main.aspx?etc=1! 🔎 👻 🛃 Email Activities: Active Email 🏄 Email Activity: Come to ou 🗙 🏦 🛣
File Email Activity Customize	Microsoft Dynamics CRM David Small @ target360dev 🛆
Save & New Save & Alew Save & Save & New Close ★ Delete	A       B       Construction       Sharing -         Send       Edit       Copy a Link       Sign       E-mail a Link         Report -       E-mail a Link       Run       Report -
Save	Targeted Email Collaborate Data
Information  General  Email Content  Spam Report	Email Activities V I V Come to our big event. Progress
Related	Marketing Lists
Common     Audit History     Marketing Lists	I Name ▲ Type Member Type Last Used On Purpose ♥
SPAM Reports Visits Sales Contacts that Opened	
Contacts that Clicked	1 - 1 of 1 (0 selected) H 🗏 Page 1 🕨
Marketing     Que Leads that Opened	▼ Email Content
Leads that Clicked      Processes	Click <u>here</u> if you are having trouble viewing this message.
	Title Goes Here
	Lorem ipsum dolor sit amet, consectetur
	adipiscing elit. Donec vehicula ante at quam ornare eu viverra ante eleifend.
	Status Active Status Reason Draft Tracking ID 2
NOTE: Some browser set have been made. You ca	tings can prevent the Email Content window from updating to reflect the changes that an refresh or re-open the Email Activity if this is the case.
15. Click the "Send Test'	" button in the Ribbon and supply your Email Address.
	Send Test
dynam	ics.com needs some information
Script	t Promot
What	t test e-mail address would you like to use?
my-a	ddress@my-company.com
	Message from webpage 💌
You should receive a cop	y of your email after 5 or so minutes.



16. Once the	email has been receiv	ed, re-load the Email Activity (e	ither refresh or clos	se and re-open the
form). Scr	oll down and open the	"Spam Report" section to review	the spam analysis of	your email.
x Snam Bon	ort			
Spam	G No. C Yor	Spam Score	0.50	
	e No e res	· .	1	
Rule	Name	Description	Points	Created On V
	IL_MESSAGE	BODY: HIML Included in message BODY: HIML font color similar to background	0.0	05/11/2012 17
1 - 2 of 2 (0	selected)			N A Page 1
	, , , , , , , , , , , , , , , , , , , ,			in the age of the
17. Once you Marketing	are happy with your te List. Click the "Send Er	est email and your spam score, y nail" button on the Ribbon.	ou are ready to sen	d your email to the
If you click OK,	the email will be sent a	and the Email Activity will close.		
18. The Progre	ess of the record will be	set to "Processing Send Campaig	n"	
🔲 🖂 🛛 The Big Even	nt Come to our	big event.	Processing Send Campaig	in
19. The Progre services.	ess will change to "Proc	essing" once the system posts t	he email activity rec	ord to the back end
🔲 🖂 The Big Even	nt Come to our	big event.	Processing	
20. Finally the receiving y	record will be set to "C our email. Over the ne	Campaign Sent Successfully" whicl xt few minutes you will see delive	n means your Marke ry statistics start to o	ting List will now be come in.
🔲 🖂 🛛 The Big Ever	nt Come to our	big event.	Campaign Sent Successful	ly 1



When you execute an email campaign, this code will automatically be added to your outgoing emails so that you can track user clicks and subsequent behaviour. You can also copy and paste this onto links in Twitter or Facebook for example.

This concludes the walkthrough. You can keep the Campaign Activity record for use in later Walkthroughs if you wish.

The next step would be to create a Marketing List to combine with the Campaign Activity.



# **3 Social Media Management & Tracking**





# 3.1 What is Social Media Management & Tracking?

Social Media Management & Tracking is an umbrella term for the ability to market via Facebook, Linked-in, Blogs and other social media platforms and track the resulting interest back to specific products and services, thus engaging with users based on their real interests and behaviours.

Target360 enables you to create Campaign containers for pushing you products and services via social media. This is done through the creation of:

- Digital Routes;
- Digital Activities.

Generally your goal will be segment your digital marketing into distinct digital routes so that leads and opportunities can be traced back to their source, allowing you to determine which social media is working best for your business.

For example, it will be useful to know that you have gained no revenue via Facebook, while Linked-in is providing substantial revenue. This may suggest that you should not be spending marketing budget on Facebook or perhaps you need to adjust your message for that audience.

The following sections provide a more detailed description of digital routes and activities.



# **3.2 Digital Activities**

Digital Activities represent specific communications with users of specific social media applications.

For example, in the screenshot below you can see three digital activities. They are part of the same campaign to publicise a new product; they have the same subject since they are projecting the same message; however, they are each for different social media platforms so we will know how many users of those social media platforms clicked on our link or advert. Using this technique we can measure the success of our social media campaigns and direct our attention and budget accordingly.

( 🔶 🏄 https://redspired	emo.crm4. <b>dynamics.com</b> /main.aspx?Origii	n=Portal&skipnoti 🔎 🗕 🖒 🗙 🏄 Digital A	ctivities: Active Dig	. ×		<b>↑ ★</b> ₽
File Digital Activities Vie	w Charts Customize	A Microsoft Dynamics CRM				CRM Admin @ Redspire Demo
New Edit X Delete -	Assign Benail a Link +	tart Run Import Report - Data→	anced nd			
Records	Collaborate Process	Data				
target360 🚮 🖳 -	Digital Activities: Active Digital C	ampaigns 👻			1	٩
▲ Alert System	Campaign Subje	ect 🔺	Clicks	Digital Route	Created On	2 <
😭 Alerts	🕅 🅵 New Product Campaign 🛛 New	Product: Pre-release Awareness Campaign		Facebook	29/10/2012 17:10	
A Reporting	See New Product Campaign New	Product: Pre-release Awareness Campaign		LinkedIn	29/10/2012 17:12	8
Reports	Skew Product Campaign New	Product: Pre-release Awareness Campaign		Twitter	29/10/2012 17:12	*
<ul> <li>A Wy Work</li> <li>A chivities</li> <li>Offline Activities</li> <li>Accounts</li> <li>Contacts</li> <li>Leads</li> <li>Opportunities</li> <li>Campaigns</li> <li>Campaigns</li> <li>Marketing Lists</li> <li>Signital Activities</li> <li>Analytics</li> <li>Visitors</li> <li>Visitos</li> <li>Visitos</li> <li>Settings360</li> </ul>	1 - 3 of 3 10 selected)					to view the chart.
	1 - 3 of 3 (0 selected)					I¶ ¶ Page 1 ▶
settings	AII # A B C D	E F G H I J K I	. M N O	P Q F	R S T U V W	X Y Z

Figure 50 - The Digital Activities Grid

Ultimately as we convert clicks into leads, opportunities and sales, we will be able to track those leads, opportunities and sales back to the digital activity and social media platform which brought them to your organisation.



# **3.3 Digital Routes**

Digital Routes represent distinct categories of social media. They can be as simple or as granular as you want.

For example, you could create a single Digital Route for all you non-email marketing activities; however you would have no way to report on specific social media platforms. Equally you could create multiple Digital Routes for Facebook to represent different types of advert; however this may be too much information and require manual analysis to recombine the statistics back under a single Facebook route.

It is up to you how many routes you create. A good starting point is shown in the screenshot below.

							x
+ https://target360	)dev186.crm4. <b>dynan</b>	nics.com/main.aspx# 🔎 🗕 🖒 🗙 🗾	🕯 Digital Routes: 🗙 🚽	🖌 Digital Route: Ne	🍌 Solution: Default	<b>↑</b> ★	₿
		🏄 Microsoft Dyna	imics CRM			David Small	0
File Digital Routes View	Charts Add	Customize				Sign Out	^
Activate	📄 Copy a Link 🚽	🚉 👘 🖾 Export to Excel 👔	•				
New Edit	E-mail a Link 🗸	Run Import Adva	nçed				
Records	Collaborate	Report + Data + Fi	na				
settings360	Digital Poutors	Active Lond Score Configuration I	Poutos -	Г			
	Digital Routes.	Active Lead Score Configuration	Coules +			-	
Solution Configs	Route A		Created On			8	<u>&lt;</u>
a Email Configs	Email Camp	paign	29/08/2012 10:08	, )			
Targeted Email Errors	Twitter		16/09/2012 13:51	- L			lick
Lead Score Configuratio							lere
Digital Routes							to vi
Form Capture Configura							ew t
Administration							he ch
Overnight Scores							lart.
Error Logs     Sand Campaigne							
Dynamics							
🗃 Imports							
4 Offline Activity							
🅼 Offline Activity Types							
¥ target360	1						
settings560	1 - 3 of 3 (0 select	ted)			н	4 Page 1 ▶	
Settings	All # A	BCDEFGHIJ	K L M N	O P Q R S	STUVW	X Y Z	

Figure 51 - The Digital Routes Grid

Digital Routes can be classed as configuration and you will only need to visit this area for initial set up and to add new routes as they arise.



# **3.4 How do I create a Digital Activity?**

#### 3.4.1 Walkthrough: Create a Digital Route

In *target360* Digital Routes are the heart of social media tracking.

In this walkthrough we will add a new Digital Route. Once added, the new route will be immediately available for use within Digital Activities.

1. Click on 'settings360' on the bottom of the navigation bar on the left-hand-side. You will only have access to these settings if you have the correct permission to do so i.e. set up as a Managing Director, Marketing Manager or Sales Manager.

		🔀 target360
		settings360
	L	Figure 52 - Navigation Groups
2. (	lick on 'Digital Routes" in the Na	avigation Menu.
		settings360 🛛 🚮 🖳 🔫 -
		▲ Email Campaign
		🍓 Solution Configs
		💩 Email Configs
		🍓 Targeted Email Errors
		4 Web Analytics
		👌 Lead Score Configuratio
		👌 Digital Routes
		Log Form Capture Configura
		4 Administration
		🕼 Visit End
		Covernight Scores
		Send Campaigns
		4 Dynamics
		Imports
		4 Offline Activity
		Offline Activity Types
		Figure 53 - Navigation Menu
3. C	Click on the 'New' button on the	Ribbon:
		20 A
		New



4. Enter the name of	of the new Digital Route.
← → ¼ https://target360c	lev186.crm4.dynamics.com/main.aspx?etc 🔎 👻 🖨 🔿 🗙 🏄 Digital Rout 👍 Digital Rout 🏄 Solution: D 🏄 Digital R 🗴 💼 🏦 🛧 🔅
	Microsoft Dynamics CRM David Small @
File Digital Route Add	Customize
Save Save & Delete	Copy a Link Bun
Close Save	E-mail a Link Report - Collaborate Data
Information	Digital Route
- General	New
Notes	▼ General
Related 4 Common	Route* LinkedIn Value* 4
Activities	▶ Notes
Audit History	
Email Activities	
Opportunities	
▲ Processes	
	Status Active
	Figure 54. The Digital Paulo Form
	Figure 54 - The Digital Route Form
The value should be a	an integer and it should be distinct from the values entered into the other digital routes
5. Click on the 'Save	e' or 'Save & Close' button on the Ribbon to add the record to <i>target360</i> .
	Save Save 8
	Close



6. The digital route is now created and can be used straight away within a digital campaign as well as other areas within *target360*.

Route 🔺	Created On	2
🛯 🍓 🛛 Email Campaign	29/08/2012 10:08	
🛾 灥 Facebook	29/08/2012 12:19	<u> </u>
🛾 🎄 LinkedIn	05/11/2012 09:51	5
🛾 🎪 Twitter	16/09/2012 13:51	9
		a de la d

This concludes the walkthrough.



### 3.4.2 Walkthrough: Create a Digital Activity

In *target360* Digital Activities allow you to track the effectiveness of clickable links and images placed on social media sites.

Multiple Digital Activities can be associated with a Campaign which may also include Email Activities and general Campaign Activities (Phone Calls, Appointments etc.).

Digital Activities will generate a Unique Tracking Code which you can append to your links and target360 will automatically track user clicks for you.

1. Click on 'target360' on the bottom of the navigation bar on the left-hand-side.

¥	target360
<u>}</u>	settings360

2. Click on 'Campaigns" in the Navigation Menu.




NO	TE: You can also cre	ate a Digital Ao	ctivity directly	from the me	nu.			
			<ul> <li>▲ Campaig</li> <li>④ Cam</li> <li>֎ Mari</li> <li>☑ Ema</li> <li>ℬ Digi</li> </ul>	ns Ipaigns keting Lists il Activities tal Activities				
3.	In this walkthrough	h we will creat	te a new Camp	baign but yo	u can use an	existing o	ne if you	wish. Click on
				New				
4.	Complete the man	datory field so	give the Camp	oaign a Name	e and a Prope	osed Begin	and End I	Date
	File Campaign Add C Save & New Save & Save & New Close	stev186.crm4. <b>dynamics.com</b> sustomize Cappias Copy as Campaign Template	n/main.aspx?etc 🔎 – 🗎 🕯 /// Micr Sharing – Copy a Link sign 🔐 E-mail a Link Re	C X Campaigns cosoft Dynamics CRM	: My C 🛃 Solution:	Default 🏄 Car	mpaign: Ne 🗙	A ★ ☆
	Save	Actions Campaign	Collaborate	Data			Campaigns	
	- General - Financials - Notes	Campaign Code		Total Cost of Campaign		Owner	<u></u>	David Small
	Related	▼ General						
	Common     Planning Activities     Campaign Activities     Audit History	Name * Offer	The Big Event		Status Reason	Proposed		
	<ul> <li>Digital Activities</li> <li>Email Activities</li> <li>Visite</li> </ul>	Schedule						
	target360     mailBlast Responses     mailBlast Errors     Marketing	Proposed Begin Date * Proposed End Date * <b>Description</b>	05/11/2012 05/12/2012		Actual Begin Date Actual End Date			
	<ul> <li>Target Marketing Lists</li> <li>Related Campaigns</li> <li>Processes</li> </ul>							
		Status	Active No of Campa	aign Activities			Tracking Code	
	<u>-</u>		Figure 56 -	The Campaigr	Form			



5.	Click 'Save' to save the record.			
	Save			
6.	Click on Digital Activities in the Navigation Menu.			
	<ul> <li>✓ Common</li> <li>✓ Planning Activities</li> <li>✓ Campaign Activities</li> <li>✓ Audit History</li> <li>✓ Digital Activities</li> <li>✓ Email Activities</li> <li>✓ Email Activities</li> <li>✓ Visits</li> <li>✓ target360</li> <li>✓ mailBlast Responses</li> <li>✓ mailBlast Errors</li> <li>✓ Marketing</li> <li>✓ Target Marketing Lists</li> <li>✓ Related Campaigns</li> </ul>			
7.	Click on the "Add New Digital Activity" button on the Ribbon:			
	Add New Digital Activity			



8. Give the Digital A	Activity a subjec	t and select	a Digital Rout	e.			
https://target360	dev186.crm4.dynamics.cor	n/main.aspx?etc 🔎	Microsoft Dynamics CR	ctivi 🔏 Solution: D	. 🏼 🏄 Campaign: 🎽 🏄 Digital		
File Digital Activity Cust	omize		in inclosofe by harnes en			target360dev 🛆	
Save & New Save & Delete Save & Save & Save & Save	Assign Copy a Link Collaborate	Run Workflow Dialog Process	Run Report - Data				
Information	Digital Activity				Digita	al Activities 🔻 🛊 🗣	
General Administration	New				Owner	David Small	
Related							
▲ Common	General     Subject *	Come to the Rig Eve	<b>n</b> †				
Audit History	Digital Route *	LinkedIn	nı	Campaign *	🚰 The Big Event		
▲ Processes	Tracking String						
	Stats						
	Clicks						
	▼ Administration						
	Campaign Start			✓ Campaign End			
	Budget Allocated	£		Actual Cost	Campaign End		
	-	J-			1-		
	Status	Active			Tracking II		
	Status	Acure			Hucking it		
In this walkthrough populated for us by t to select a Campaign.	we have creat he system. If y	ed the digi ou have cre	tal activity fr ated the activ	om a campa ity directly fro	ign so the Campa om the menu ther	ign field will be you would have	
9. Click 'Save' to save	ve the record.						
Save							
10. The Tracking cod	le field will be p	opulated aft	er the record	has been save	ed.		
Tracking String ?~e	cwa~=0000000011~	004~0001					
You can now append	You can now append this to any links you plan to put on LinkedIn, for example:						
www	v.mysite.com	n/bigevent	t.htm?~ecv	/a~=000000	0011~004~000	1	
This concludes the wa	alkthrough.						







### 4.1 Administering Lead Scoring

#### 4.1.1 Lead Score Configuration

The Lead Score Configuration settings can be found and edited by target360 Administrators.

Select settings360 on the bottom of the navigation bar on the left-hand-side.

Click on "Lead Score Configuration" in the Navigation Menu.



For lead scoring to work, there needs to be at least one record on the Lead Score Configuration Grid.





The Lead Score Configuration grid is shown below:

Lead Score Configurations		Active Lead Score Configurations 🔻
1	Name 🔺	Created On
<ul><li>✓</li></ul>	Default	18/01/2012 13:53

Figure 57 - An example of the Lead Score Configuration Grid.

If there are no records here then leads will not be scored.

If a record exists, open it by double-clicking; if not then create a new one by clicking on the "New" button on the Ribbon (You do not have to save the record if you do not want to implement Lead Scoring..



The Lead Score Configuration form is shown below:

Lead Score Default	Configuration			[	Lead Score Configura	tions 🕶 🛧 🔱
General						
Name *	Default					
Values						
Route to Site - Email *	5	Route to Site - Digital *	3	Chat *	3	
Phone Call -	3	Phone Call -	1	Form Capture *	10	
Email - Sent *	1	Email - Opened *	1	]		
▶ Notes						
Status	Active			Numb	er of Campaigns	43

Figure 58 - An example of the Lead Score Configuration Form

A Lead Score Configuration record will typically have a name which can be anything you wish. At the bottom of the form you will see the total number of Campaigns which have been added to target360.



#### 4.1.2 Events that can be Scored

The Lead Score Configuration options available are as follows:

Route to Site - Email	Where a lead is created via an Email Activity, the points attributed here will be added to the Lead's Score.
Route to Site - Digital	Where a lead is created via an Digital Activity, the points attributed here will be added to the Lead's Score.
Chat	Where a Lead has chatted with you via the target360 chat mechanism, the points attributed here will be added to the Lead's Score. The score will increase but the point in this field for every chat.
Phone Call - Incoming	When you receive a phone call from a Lead and store that in CRM as a Phone Call activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every Phone Call activity.
Phone Call - Outgoing	When you phone a Lead and store record that event in CRM as a Phone Call activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every Phone Call activity.
Form Capture	Every time the Lead fills in a form on your web site, their score will be increased by the amount in this field.
Email - Sent	When a Lead receives an email as sent from an Email Activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every email
Email - Opened	When a Lead opens an email as sent from an Email Activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every email

If you do not wish to score certain events you can enter zero in the relevant field. For example, you may not wish to score outgoing phone calls. Simply zero or clear the field.

#### Warning

Scores can be changed at any time, and they will take effect from the next event. However all events prior to the change will NOT be re-scored.



### 4.2 Using Lead Scoring

### 4.2.1 Viewing the Score of a Lead

When you click on Leads in the Navigation Menu, the default sort for the records is by Score.

You can see how the Open Leads shown in the screen shot below are ordered by the Score column.

target360 🛛 😭 🙀 -	Leads Open Leads -						
4 Alert System	Name Name	Company Name	Topic	Lead Status	Status Reas	Created On	Score 💌
Alerts	Alana Merola	Print Design	Interested in Marketing Automation		New	20/11/2012 12:04	100
4 Reporting	Katie Armstrong	target360	TFMA London	Investigating	New	05/09/2012 13:18	27
Dashboards	Matthew Hoge	Bancon	Enquiry regarding your CRM system		New	23/11/2012 10:03	19
Reports	Jessie Whitenack	Greens	CRM Enquiry		New	14/12/2012 14:41	18
▲ My Work	Ralph Summers	Direct Leisure			New	01/10/2012 08:54	16
Activities	Neil Holmes	Connector	CRM Enquiry		New	10/12/2012 10:31	16
Offline Activities	Rebecca Campbell	Redwalk	CRM Enquiry		New	18/12/2012 12:29	16
Accounts	Tia Aitchison	Cicki	CRM Enquiry		New	22/01/2013 16:27	15
Solution Contacts	Lorraine Spitz	Fancymethod	CRM Enquiry		New	22/01/2013 15:42	13
Opportunities	Mike Laurence	Harbour Motors	Im looking for a client contact mana		New	01/10/2012 09:12	13
4 Campaigns	Katy Laxson	Concept Solutions	Can i be forwarded in further inform		New	19/11/2012 10:33	13
Campaigns	Ashlee Anderson	Clean Easy	Could I be given more information re		New	23/11/2012 12:07	12
Harketing Lists	Jessie Lightle	Dominate	CRM Enquiry		New	11/12/2012 08:57	12
Email Activities	Lilia Williams	Williams Enterpr	Can I have further information regar		New	23/11/2012 10:17	11
3 Digital Activities	Lewis McCowel	Black & Red Co	Can I be forwarded on information in		New	20/12/2012 08:51	11
	Jeanie Starkes	Brandon Hire	CRM Enquiry		New	14/12/2012 10:47	11
Visitors	Max Carew	Ascot Studios	Can I please be forwarded informatio		New	04/01/2013 09:11	11
Al Vicite							

#### Figure 59 - An example of the Lead Grid

You can reorder the grid and also filter the grid using the standard Excel functionality (for example, filter by "Scores greater than or equal to 15" etc.).

When you open a Lead, the score is shown at the top of the form:

Lead Erik Ferg Lead Source Web	uson Score 10	Owner	: Kirk	Leads	▼ ↑	♥
General						
Topic +	CRM Enquiry					
Salutation		Business Phone	07982567156			
First Name +	Erik	Home Phone				
Last Name *	Ferguson	Mobile Phone				
Job Title		Fax				
Company Name *	Pacific UK	Other Phone				
Web Site						
E-mail *	test@target360.com					
Address						
Street 1		State/Province				
Street 2		ZIP/Postal Code				
Street 3		Country/Region				
City		Phone				

Figure 60 - An example of a Lead Form



The score can be investigated by looking at Closed Activities, Targeted Email Sends and Opens etc.

Warning Of course the Lead Score values may change during the lifecycle of a Lead.



# 5 Sales

A sale is defined as the process of converting the Opportunities, obtained from marketing mechanisms, into revenue for your business.

Opportunities will be won and lost in this phase of the Marketing & Sales Cycle. You will want to analyse the success of these conversions with specific reference to the sources of these Opportunities so that you can determine the quality of you digital routes and leads.

*target360* focuses on the sales journey of a contact from visitor to sales lead to opportunity to customer. Sales management focuses on the promotion of a sales lead to an opportunity.



### **5.1 Opportunities**

### 5.1.1 Opportunity Creation

### 5.1.2 Walkthrough

In this walkthrough we will create an Opportunity.

To create an Opportunity you need to navigate to the 'Opportunities' section of *target360* on the Application navigation pane as shown below.



# 6 Dashboards

The default user homepage in *target360* is called the *Dashboard* which is made up of a collection of charts and lists. The purpose of this is to display your most pertinent information on a single front page.

The default dashboard that is displayed can be compiled, edited and modified to give you the best overall view of your business from your perspective.





Various dashboard views are available which pertain to the role of a particular user. For example, the figure above shows the visitor, sales and web sales pipeline as well as visits and won opportunities in the last week. This is all considered to be relevant information for the managing director.



### 6.1 target360 Dashboards

Dashboard views are selected by clicking on the role to the right-hand-side of 'Dashboard:' as shown below:

File	Dashb	oards							
		·				2	2	æ	
Save As	New	Edit	Delete	Set As Default	Share Dashboard	Assign	Refresh	Advanced Find	
	Dashboa	ard Mana	agement		A	Action		Query	
<b>i</b> c	RM for O	utlook	See ho	w CRM fo	r Outlook ma	kes you	even mor	e productive.	C
targe	t360	🖓	📮 -	Dash	board: (1-N	Manag	ing Dire	ctor -	
Alert	System				_	~ <u> </u>			

Figure 62 - Dashboard Views

By changing this view, you can display different lists and views depending on the system user role.

The top menu bar contains a list of dashboard options including creating a new dashboard, editing an existing one, deleting, setting as default (which affects the first dashboard displayed) or sharing a dashboard.

The default list of target360 dashboard views is:

- 1) Managing Director
- 2) Marketing Manager
- 3) Marketing Professional
- 4) Sales Manager
- 5) Salesperson
- 6) Visitor Pipeline
- 7) Opportunity Summary
- 8) Marketing ROI
- 9) Visit Analysis
- 10) Conversion Summary



#### 6.1.1 Managing Director



Figure 63 - Dashboard 1: Managing Director

Managing Directors will wish to see a high level overview of the business. The default dashboard panels are:

Visitor Pipeline	<ul> <li>A summary of website visits over a period, broken down into:</li> <li>Unknown,</li> <li>Known (leads)</li> <li>Opportunities (qualified leads) and</li> <li>Won (sales).</li> </ul>
Sales Pipeline	A chart of current sales leads in the sales process as suspects, prospects and closing.
Web Sales Pipeline	Open web opportunities classed as suspect and prospect.
Visits By Source	Using tracking codes, this shows the source of the web visits over a period of time e.g. blank, blog, email, Google Adwords, twitter and direct.
Opportunities Won Last Week	Sales won in the last 10 days as a list containing topic, customer, estimated revenue and owner.



#### 6.1.2 Marketing Manager



Figure 64 - Dashboard 2: Marketing Manager

Marketing Managers will wish to see overall marketing activity within the business. The default dashboard panels are:

Closed Leads Last 3 months	This shows a breakdown on a month by month basis of the qualified and disqualified leads in the last 3 months.
All Leads in last 6 months	A month by month breakdown of all leads.
Visitors Pipeline	<ul> <li>A summary of website visits over a period, broken down into</li> <li>Unknown,</li> <li>Known (leads)</li> <li>Opportunities (qualified leads) and</li> <li>Won (sales).</li> </ul>
Open Leads	All open leads in the system by lead name, topic, status, date created, lead score and owner.



#### 6.1.3 Marketing Professional

This is a personalised view for the system user for the Marketing Manager dashboard described above in section 8.1.1.2 above. [TODO: Reword.]

#### 6.1.4 Sales Manager



Figure 65 - Dashboard 4: Sales Manager

Sales Manager will wish to see various views of the sales pipeline. The default dashboard panels are:

Won and Lost	The closed sales opportunities in the last 2 months, broken down into won and lost sales.
Last 6 months	The total number of opportunities broken down by month.
Sales Pipeline	A chart of current sales leads in the sales process as suspects, prospects and closing.
Open Leads	All opportunities (qualified sales leads) in the system by lead name, topic, status, date created, lead score and owner.



### 6.1.5 Salesperson

This is a personalised view for the system user for the Sales Manager dashboard described above in section 8.1.1.4 above. [TODO: Reword.]



### 6.1.6 Visitor Pipeline

Dashboard: 6-Visitor Pipeline -			
Valtors Repaine Lat 30 days	Urkrown Kroen Opportu Won	Visitors Ripeline Last 60 ays 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Visitors Pipeline Last 50 days 5 5 5 6 3
Visitors Realine Drg 1.12	Urkoon Koon Oportu. Won	There is no data to create the Visitors Ryadine chart.	There is no data to create the Violars Ripetine chart.

Figure 66 - Dashboard 6: Visitor Pipeline

The Visitor Pipeline dashboard focuses on website traffic over different periods of time, as shown above. These display the visitors broken down into:

- Unknown;
- Known;
- Opportunities and
- Won

over periods of 30, 60, 90 and 1-30 days respectively.





### 6.1.7 Opportunity Summary

Figure 67 - Dashboard 7: Opportunity Summary

The Opportunity Summary dashboard provides a view of won, open and lost opportunities in 3 separate lists. In addition to this, the opportunities within the last 6 months and estimated revenue from opportunities are graphically displayed.



### 6.1.8 Marketing ROI

The Marketing ROI report focuses on the revenue generated by campaigns, digital route and campaign activity as shown below.



Figure 68 - Dashboard 8: Marketing ROI

The 3 graphs that are represented are as follows:

Est. Revenue by Campaign	For all defined campaigns, this shows the total revenue per campaign.
Est. Revenue by Digital Route	For all campaign routes that have been defined during the campaign creation process, this displays the revenue for each route e.g. Facebook, Twitter, Email or LinkedIn.
Est. Revenue by Campaign	Display of expected revenue for all campaign activities that act as
Activity	sub-campaigns.



#### 6.1.9 Visitor Analysis



Figure 69 - Dashboard 9: Visitor Analysis

The Visitor Analysis dashboard, as shown above, focuses on the website visits to display 5 separate graphs over different periods of time i.e.:

- 1) Visits by Day
- 2) Visits by Week
- 3) Visits by Top 5 Keyword
- 4) Visits by Top 5 Route
- 5) Visits by Top 5 Campaigns



### 6.1.10 Conversion Summary



Figure 70 - Dashboard 10: Conversion Summary

The Conversion Summary dashboard focuses on journey from visitor through to sale, showing a graph of count over time for:

- 1) Visits by Week
- 2) Leads by Week
- 3) Won Opportunities by Week



### **6.2 Creating a New Dashboard**

*target360* is packaged with a number of dashboards already created for specific user roles. However, you can also create a brand new dashboard with graphs and lists that are most helpful to your daily job role.

File Dashboards		
		A
Save New Edit Delete Set As As Default	Share Assign Refresh Dashboard All	Advanced Find
Dashboard Management	Action	Query
CRM for Outlook See how CRM for	or Outlook makes you even mo	re productive.
target360	board: 10-Conversion	Summary <del>+</del>
Alert System     Alerts	aciales laurate ale	

Figure 71 - The New Dashboard Button on the Ribbon

To create a new dashboard, click on the 'New' button as shown above. This will open the new dashboard wizard as shown below:

🖉 Dashboard Layouts Webpage Dialog			X
bttps://redspiredemo.crm4.dynamics.com/tools/dash	boardeditor/dialogs/dashboard	dlayoutdialog.aspx	
Select Dashboard Layout Select a layout for your dashboard. You can use this layout.	as your initial outline, and th	nen resize, add, or rearrange the components withi	n this
3-Column         Regular Dashboard         2-Column         Regular Dashboard	4-Column Overview Dashboard	A-Column Regular Dashboard This layout can accommodate components across three columns.	
		Create	
https://redspiredemo.crm4.dynamics.com/tools/dashboar	deditor/dialogs/dashboardlayou	utdialog.aspx 😜 Internet	-

Figure 72 - The New Dashboard Wizard

The dashboard wizard will then step through the dashboard layout and allow you to select the most relevant dashboard lists and graphs, customised to your needs.



# 7 Reporting

Reports offer a more detailed breakdown and analysis of data that Dashboards do as they have access to more advanced data queries.

The Reporting Section is made up of the following *target360* Reports:

Report	Description
Chat Summary	A summary of chat activity taking place on your web site over a time period specified by you.
Contacted Leads by Marketing Campaign	A summary of Leads who have visited your web site and have also been contacted via a target360 Activity.
Contacted Leads by Referring Page	A summary of Leads who have visited your web site along with the external web site which referred them.
General Summary	An analysis of the quantities of pages viewed and visitors, broken down by Visitor Type and Region and taking place across a period of time that you specify.
Keyword Summary Keyword Summary by Search Engine	A summary of the most popular keywords used in search engines which resulted in a visit to your site.
Leads Who Visited via Email Link	A list of Leads who visited your web site by clicking on a link contained within an email.
Opportunities Summary	An analysis of Opportunities by Status and Estimated Revenue by Opportunity Owner.
Page Views	An analysis of visits to your web site allowing you to determine which of your web pages are popular as well as which pages visitors use to land and leave your web site.
Return on Investment (ROI)	
Time and Number of Visits per Site	An analysis of the number of seconds, the number of pages seen and the total number of distinct visits to your web site broken down by date and hour.
Top Leads	An analysis of high scoring Leads per Owner per Date.
Top Leads – Not Contacted	
Visit / Lead Comparison	A comparison of Total Visitors with Known Visitors split into new and return visits.
Visit / Lead Summary - Daily Visit / Lead Summary -Weekly Visit / Lead Summary - Monthly	An analysis of visits by known Leads over a date range that you specify.
Visits and Leads Generated	An analysis of visits, showing the volume of new Visitors, Files Downloaded and Visiting Leads.



Visits by Marketing Campaign	An analysis of visits broken down by Campaign, Digital Route and Campaign Activity.
Visits by Referring Page	An analysis of web site visits, showing unique visits against the referring page (the URL of the page preceding the visit).
Web Traffic Peak Times	The Web Traffic Peak Times Report provides a view of the peak hour of visits for each day in the reporting period that you have specified.



## 7.1 Chat Summary

### 7.1.1 Purpose

The Chat Summary Report provides a summary of chat activity taking place on your web site over a time period specified by you.

#### 7.1.2 Tables

Site	Week Commencing	Visit Date	Requested Chats *	Invitations to Chat	Successful Chats	Avg Chat Time	Chats with Leads
Redspire.	co.uk						
	<b>⊞ 09/05/201</b>	L	1	1	0	0.00	0
	□ 23/05/2011		9	9	1	312.00	0
		24/05/2011	2	2	0	0.00	0
		25/05/2011	5	5	1	312.00	0
		26/05/2011	2	2	0	0.00	0
	<b>13/06/2011</b>		1	0	1	31.00	0
	<b>⊞ 04/07/201</b>	L	7	7	0	0.00	0
	<b>⊞ 05/09/201</b>	L	1	1	1	0.00	0
	<b>⊞ 19/09/201</b>	L	2	2	0	0.00	0
	<b>⊞ 10/10/201</b>	L	3	3	2	0.00	0
	<b>⊞ 12/12/201</b>	L	2	2	0	0.00	0
	<b>⊞ 19/12/201</b>	L	1	1	1	4.00	0

Figure 73 - Sample Chat Summary Report

Column	Description		
Week Commencing	Visits are summarized into weeks. The date in this column represents the Monday of the week during which a chat took place.		
Visit Date	The Visit Date represents the date on which a chat took place.		
Requested Chats	Requested Chats represent the total number of chats which were initiated by your operatives (whether they were successful or not) PLUS the total number of chats which were initiated by visitors to your web site (that were successful). Note: In this version of target360, chats which were initiated by visitors to your web site which are unsuccessful are not captured in this report.		
Invitations to Chat	Invitations to Chat represent the total number of chats which were initiated by your operatives (whether they were successful or not).		
Successful Chats	Successful Chats represent the actual chats between your operatives and your visitors.		
Avg. Chat Time	Average Chat Time represents the Total Chat Time divided by Successful Chats.		



Chats with Leads	Chats with Leads represent Successful Chats identified as being with existing
	target360 Leads.



## 7.2 Contacted Leads by Marketing Campaign

### 7.2.1 Purpose

The Contacted Leads by Marketing Campaign Report provides a summary of Leads who have visited your web site and have also been contacted via a target360 Activity (Email, Phone Call, Fax etc.).

Note that User Chats are not currently included in this report.

Leads are shown in this report only if they were created during the time period that you specify.

#### 7.2.2 Tables

Week Commencing	Date	Campaign	Lead	Count of Contacted Leads
□ 20/02/2012				2
	□ 21/02/2012			1
		Direct (Direct)		1
			Test Chat	
		⊟ Test Campaign (Facebook)		1
			Test Chat	
	□ 21/02/2012			1
		□ Test Campaign (Facebook)		1
			Referrer 1 Facebook	
□ 27/02/2012				1
E	□ 27/02/2012			1
		□ Campaign 10 (Email Campaign)		1
			Test Employees	
		Direct (Direct)		1
			Test Employees	

Figure 74 - Sample Contacted Leads by Marketing Campaign Report

Column	Description
Week	The data is summarized into weeks. The date in this column represents the
	Monday of the week during which the Lead was created.
Date	The Date represents the date on which the Lead was created.
Campaign	The Campaign is derived from the Visit conducted by the Lead.
Lead	The Full Name of the Lead.
Count of Contacted Leads	A count of the Leads as shown in the detail of the report. This is calculated at the Week, Date and Campaign levels.



## 7.3 Contacted Leads by Referring Page

#### 7.3.1 Purpose

The Contacted Leads by Referring Page Report provides a summary of Leads who have visited your web site along with the external web site which referred them (for example, a search engine).

You can specify a time period which is executed against the Lead creation date

#### 7.3.2 Tables

Lead Created Date	Referring Page	Count of Contacted Leads
⊞ 30/01/2012		4
⊞ 31/01/2012		7
□ 01/02/2012		2
	Direct	2
	http://www.google.co.uk/imgres	1
	http://www.google.co.uk/url	1
	http://www.redspire.co.uk/about_the_team.php	1

Figure 75 - Sample Contacted Leads by Referring Page Report

Column	Description
Lead Created Date	The date on which the Lead was created.
Referring Page	The URL prior to a page visit on your web site as recorded in the Lead's Visit record Direct is shown if the URL was entered directly into the browser.
Count of Contacted Leads	A distinct count of the Leads as shown in the detail of the report.



## 7.4 General Summary

### 7.4.1 Purpose

The General Summary Report provides an analysis of the quantities of pages viewed and visitors broken down by Visitor Type and Region and taking place across a period of time that you specify.

#### 7.4.2 Tables

Pages Viewed Summary			
Year Month Page Views			
	<b>⊞ 2012</b>		1838
		January	862
		February	976

Figure 76 - Sample Pages Viewed Summary Table

Column	Description
Year	The year during which the visits occurred.
Month	The month during which the visits occurred.
Page Views	The total number of page views on your web site for each month in the specified period.

		Visit Sumr	nary	
Year	Month	Visit Date	Visitor Type	Visitors
2012				
	⊞ January		New	244
			Returning	127
	⊞ February		New	305
			Returning	133

#### Figure 77 - Sample Visit Summary Table

Column	Description
Year	The year during which the web site visits occurred.
Month	The month during which the web site visits occurred.
Visit Date	The day on which the web site visits occurred.



Visitor Type	"New" and "Returner" representing the type of visit recorded by target360.
Visitors	The total number of distinct visitors to the web site.

Unique Site Visitors		
Region	Unique Visitors	Visits
	571	809
Aberdeen City	3	3
Al Qahirah	2	2
Alabama	1	2
Alsace	1	1
Amman Governorate	1	1
Andalucia	1	1
Andhra Pradesh	1	1
Angus	1	1
Aquitaine	1	1
Ar Riyad	1	1
Attiki	1	1
Barking and Dagenham	1	2
Barnsley	1	2
Bayern	1	1
Bodfordehiro	3	4

#### Figure 78 - Sample Unique Site Visitors Table

Column	Description
Region	The region in which the site visitor resides. Some regions may also contain the Country of origin.
Unique Visitors	The total number of unique Visitors per Region.
Visits	The total number of Visits per Region.



### 7.5 Keyword Summary

### 7.5.1 Purpose

The Keyword Summary Report provides a summary of the most popular keywords used in search engines which resulted in a visit to your site.

The report shows a breakdown of;

- Keywords (phrases used within search engines, ordered by popularity)
- Search Terms (individual words, used within search engines and ordered by popularity)

#### 7.5.2 Tables

Keywords	Total Visits
Customer Service	4
Customers Service	3
customer	1
Red Spire Crm	1
signpost	1
Single View Of Customer Image	1
Dynamics Crm 2011 Sales	1
Basic Crm Establishes A Foundation For Customer Information	1
Mscrm 2011 Outlook Client Appointment	1
Dynamic Crm Track Products	1

#### Figure 79 - Sample Keyword Summary Report

Column	Description
Keywords	A phrase entered into a search engine by a user which resulted in a visit to your site.
Search Terms	A word entered into a search engine by a user which resulted in a visit to your site.
Total Visits	A count of visits associated with the Keywords / Search Terms used to locate your web site.



## 7.6 Keyword Summary by Search Engine

### 7.6.1 Purpose

The Keyword Summary by Search Engine Report provides a summary of the most popular keywords used in search engines which resulted in a visit to your site.

On this report the Keywords are grouped by Search Engine.

#### 7.6.2 Tables

Search Engine	Keywords	Visit Total
⊞ Bing		9
	Redspire Glasgow	5
	Customer Retention Figures	1
	Microsoft Dynamics 2011 Sales	1
	Crm Social Services	1
	Red Spire Glasgow	1
⊞ Google.at		1
	Dynamics Crm 2011 Processes	1
🗆 Google.ca		1
E Google.co.in		6
Google.co.tz		2
E Google.co.uk		91
🗆 Google.co.za		2

#### Figure 80 – Sample Keyword Summary by Search Engine Report

Column	Description
Search Engine	This report is grouped by the Search Engines used to find your web site.
Keywords	A phrase entered into a search engine by a user which resulted in a visit to your site.
Total Visits	A count of visits associated with the Keywords / Search Terms used to locate your web site.



## 7.7 Leads Who Visited via Email Link

### 7.7.1 Purpose

The Leads Who Visited via Email Link Report provides a list of Leads who visited your web site by clicking on a link contained within an email.

The report is grouped by Campaign and then Campaign Activity.

Only Lead Visits which have a Digital Route set to "Email Campaign" will display in this report.

#### 7.7.2 Tables

Campaign	Activity	Name	Company	Email			
Redspire Marketing							
	Redspire Newsletter						
		Muriel Kennedy	Wallace McDowall Ltd	test@target360.com			
		Kevin Barr	LANARKSHIRE WELDING COMPANY LIMITED	test@target360.com			
		P Bonner	HALLEY STEVENSONS LIMITED	test@target360.com			
		Deirdre De Marco	Flexel International Ltd	test@target360.com			
		Donald Khushi	JAMES A. CUTHBERTSON, LIMITED	test@target360.com			
		Paul Faber	BAR KNIGHT PRECISION ENGINEERS LIMITED	test@target360.com			
		Derek Smith	THORNBRIDGE SAWMILLS LIMITED	test@target360.com			

Figure 81 - Sample Leads Who Visited via Email Link Report

Column	Description
Campaign	The Campaign to which the Lead has responded by clicking on the Email Link.
Activity	The Campaign Activity to which the Lead has responded by clicking on the Email Link.
Name	The full came of the Lead.
Company	The company name of the Lead,
Email	The Email Address of the Lead.



## 7.8 Opportunities Summary

#### 7.8.1 Purpose

The Opportunity Summary Report provides an analysis of opportunities by Status ("In Progress" and "Won") and shows the Estimated Revenue by Owner.

The report will show opportunities created within a date range that you specify.

#### 7.8.2 Tables

Owner	Opportunity Status	No. of Opportunities	Total Est. Revenue
Dave Burrell			
	In Progress	2	£82,863.00
	Won	6	£45,260.00
	Canceled	3	£42,630.00
target360			
	In Progress	6	£72,398.00

#### Figure 82 - Sample Opportunity Summary Report

Column	Description
Owner	The Owner of the Opportunity record.
Opportunity Status	Only a Status of "In Progress" and "Won" will be shown in this report.
No. of Opportunities	A Count of the Opportunities grouped by Owner and Status.
Total Value	A Sum of Estimated Revenue grouped by Owner and Status.

This report also shows a chart of the tabular data. Owner is shown on the Y-Axis and the sum of Estimated Revenue is shown on the X-Axis.

A bar will be shown for each Status so that "In Progress" Opportunities can be viewed side-by-side with those already "Won".



### 7.8.3 Charts

Opportunity Outcomes by Owner



Figure 83 - Sample Opportunity Outcomes by Owner Chart


### 7.9 Page Views

### 7.9.1 Purpose

The Page Views Report provides an analysis of visits to your web site allowing you to determine which of your web pages are popular as well as which pages visitors use to land and leave your web site.

The report will show Page Views created within a date range that you specify.

#### 7.9.2 Tables

Site	Page	Total Views	Viewed As Landing Page	Viewed As Exit Page
Redspire.co.u	Redspire.co.uk			
	about_community.php	4	1	1
	about_core_values.php	3	1	1
	about_our_culture.php	3	0	0
	about_the_team.php	14	1	5
	about_us.php	5	0	2
	careers.php	5	0	1
	careers_current_opportunities.php	5	0	2
	careers_our_interview_process.php	2	0	0
	careers_your_development.php	2	0	0
	case_studies.php	2	0	1
	contact.php	17	0	7
	crm_customer_information_manageme nt.php	4	2	2
	crm_customer_services.php	11	9	9
	crm_fraud_prevention.php	1	1	1
	crm_loyalty.php	1	1	1
	crm_segmentation.php	8	5	4
	crm_single_customer_view.php	12	6	6
	default.php	44	36	15
	dynamics crm.nhn	1	٥	1

Figure 84 - Sample Page Views Report



Column	Description
Site	Page Views are grouped by Web Site.
Page	A Web Page on your Web Site which has been visited.
Total Views	A count of the number of times a web page has been visited.
Viewed as Landing Page	A count of the number of times a web page has been visited as a Landing Page. That is where a page is the first viewed by the visitor within a sequence of page visits.
Viewed as Exit Page	A count of the number of times a web page has been visited as an Exit Page. That is where a page is the last viewed by the visitor within a sequence of page visits.

The Page Views Report contains a number of charts which allow you to see your most popular pages.



### 7.9.3 Charts

Count of Views



Figure 85 - Sample Count of Views Chart

This chart is a stacked bar chart showing "Pages" along the Y-axis and the "View Count" along the X-axis. You can see colour coded representations of the type of visit (Landing, Exit, Both and Neither).

Pages are ordered by popularity and you can throttle the number of pages shown by raising the "Minimum Hits" parameter.



#### Viewed as Landing Page



Figure 86 - Sample Viewed as Landing Page Chart

This chart is a bar chart showing the number of times each page on the Y-axis has been visited as a Landing Page.

A Landing Page is the first page viewed by the visitor within a sequence of page visits.

Pages are ordered by popularity and you can throttle the number of pages shown by raising the "Minimum Hits" parameter.



#### Viewed as Exit Page



Figure 87 - Sample Viewed as Exit Page Chart

This chart is a bar chart showing the number of times each page on the Y-axis has been visited as an Exit Page.

An Exit Page is the last page viewed by the visitor within a sequence of page visits. After this, either the browser window has been closed, or the user has navigated to a web page out with the scope of your web visit capture settings.

Pages are ordered by popularity and you can throttle the number of pages shown by raising the "Minimum Hits" parameter.



## 7.10Return on Investment (ROI)

#### 7.10.1 Purpose

The Return on Investment (ROI) Report provides an analysis sales and potential sales revenues through time and broken down by Campaign, Digital Route and Campaign Activity.

#### 7.10.2 Tables



Campaign	Campaign Budget	Opportunity Est. Revenue	Opportunity Act. Revenue	Campaign Target
	£2,000	£20,345	£5,000	£6,000
Redspire Marketing	£0	£15,345	£0	£6,000
TFMA Event 2012	£2,000	£5,000	£5,000	£0

Figure 88 - Revenue by Campaign

Column	Description
Campaign Budget	The Budget for the Campaign.
Campaign Target	The Target Revenue for the Campaign.
Opportunity Est. Revenue	The Total Estimated Revenue for In-Progress Opportunities related to the Campaign.
Opportunity Act. Revenue	The Total Actual Revenue for Won Opportunities related to the Campaign.





Digital Route	Campaign Budget	Opportunity Est.Revenue	Opportunity Act. Revenue	Campaign Target
	£0	£15,345	£0	£6,000
Facebook	£0	£9,345	£0	£3,000
Linked In	£0	£6,000	£0	£3,000

Figure 89 - Revenue by Digital Route

Column	Description
Campaign Budget	The Total Budget for the Digital Route Campaign(s).
Campaign Target	The Total Target Revenue for the Digital Route Campaign(s).
Opportunity Est. Revenue	The Total Estimated Revenue for In-Progress Opportunities related to the Digital Route.
Opportunity Act. Revenue	The Total Actual Revenue for Won Opportunities related to the Digital Route.





Campaign Activity	Opportunity Est.Revenue	Opportunity Act. Revenue
	15,345	0
Marketing Email - Discount Offer Follow-Up	9,345	0
Redspire Newsletter	6,000	0

#### Figure 90 - Revenue by Campaign Activity

Column	Description
Opportunity Est. Revenue	The Total Estimated Revenue for In-Progress Opportunities related to the Campaign Activity.
Opportunity Act. Revenue	The Total Actual Revenue for Won Opportunities related to the Campaign Activity.













### 7.11Time and Number of Visits per Site

#### 7.11.1 Purpose

The Time and Number of Visits per Site Report provides an analysis of the number of seconds, the number of pages seen and the total number of distinct visits to your web site broken down by date and hour.

#### 7.11.2 Tables

Date	Hour	Seconds on Site	Pages Seen	No. of Visits
□ 25/02/2012		263	9	5
	09 - 10	61	1	1
	10 - 11	53	2	1
	14 - 15	27	1	1
	20 - 21	122	4	1
	22 - 23	0	1	1
<b>□ 26/02/2012</b>		597	12	5
	01 - 02	242	5	1
	02 - 03	146	1	1
	07 - 08	60	2	1
	11 - 12	99	2	1
	15 - 16	50	2	1



Column	Description
Date	The date of the visits being reported.
Hour	The hour of the visits being reported in the form " $15 - 16$ " (this example would provide time and total visit metrics for visits which occurred between 3pm and 4pm).
Seconds on Site	The total number of seconds which visitors spent on site.
Pages Seen	The total number of pages seen by visitors to the site.
No. of Visits	The total number of unique visitors to the site.

Note: Unique visitors are often identified by using browser cookies so an individual who logs on to the site using different browsers or computes may register as multiple individuals.



### 7.11.3 Charts

The Visits by Hour Chart

The Visits by Hour Chart is a composite line graph of visits by hour. Each date chosen in the range will be shown as a distinct colour on the graph so trend can be analysed.

Note that if a large date range is selected, it will become very difficult to identify a specific date line and the chart may become excessively noisy.



Figure 93 - Sample Visits by Hour Chart



## 7.12Top Leads

#### 7.12.1 Purpose

The Top Leads Report provides an analysis of high scoring Leads per Owner per Date. Only Leads with a maximum score greater than zero will be shown in the analysis.

The maximum score is determined across the date range of the report as entered by you.

7	.12.	2	Т	a	bl	e	S
/		2	•	a			3

Created On	Owner	Name	Company	Business Telephone	Maximum Score
01/02/2012					
	target360				
		Eric Schmidty	Google	0123456789	17
06/02/2012					
	target360				
		Dave Burrell	Redspire	07837930098	28
		Dave Burrell (test)	Target360	07837930098	11
07/02/2012					
	target360				
		Joshua Bruce	Paper Cutter	01234567890	22
20/02/2012					
	CRM Admin				
		David Small	Redspire	01234567890	17

Figure 94 - Sample Top Leads Report

Column	Description
Created On	The date that the Lead was created.
Owner	The Owner of the Lead. This is generally the user responsible for nurturing the Lead.
Name	The name of the Lead.
Company	The company of the Lead.
Business Telephone	The business telephone number of the Lead.
Maximum Score	The maximum score of the Lead across the date range of the report as entered by you.



For a Lead to appear on the report:

- It must be an Active lead
- It must have been created on a date within the date range of the report.
- It must have a maximum score greater than zero at on a data within the date range of the report.



### 7.12.3 Charts

**Owner Leads Chart** 



The Owner Leads Chart shows Owners along the X-axis and a count of Active leads along the Y-axis.

Figure 95 - Sample Owner Leads Chart

Owner Average Score Chart

The Owner Average Score Chart shows Owners along the X-axis and the average Lead score along the Y-axis.



Figure 96 - Sample Owner Average Score Chart



### 7.13Top Leads – Not Contacted

### 7.13.1 Purpose

[This is currently not fit for purpose due to the difficulty of reporting on a record with NO child records. The absence of records cannot be determined using FetchXML. The report can be done by combining two FetchXML queries and iterating through one of them. This will be added to the next version of target360.]



## 7.14Visit / Lead Comparison

#### 7.14.1 Purpose

The Visit / Lead Comparison Report provides a comparison of Total Visitors with Known Visitors split into new and return visits.

You can specify two date periods and compare the results.

#### 7.14.2 Tables

Column	Description
Туре	"New" and "Returner" representing the type of visit recorded by target360.
Total Visits	A count of the number of visits recorded by the system over a date period defined by you split by visit type.
Known Visitors	A count of the number of visits by known visitors recorded by the system over a date period defined by you split by visit type.
Period	Two date periods can be specified for comparison. The default is two consecutive weeks.

#### Visit Totals Chart

The Visit Totals Chart shows the total number of visits for each period and visit type. Period 1 is shown in black and Period 2 is shown in green.



## 7.15Visit / Lead Summary - Daily

#### 7.15.1 Purpose

The Visit / Lead Summary - Daily Report provides an analysis of visits by known Leads over a date range that you specify.

Visits are broken down by type ("New" and "Return" visits) and by day. From the table you can see total site visits and then the total site visits by known Leads.

#### 7.15.2 Tables

Site	Visit Date	Visit Type	No Of Visits	No Of Leads
Redspire.co.uk				
	20/2/2012			
		New	11	0
		Returner	8	0
	21/2/2012			
		New	14	0
		Returner	5	0
	22/2/2012			
		New	15	0
		Returner	5	0
	23/2/2012			
		New	10	0
		Returner	4	0
	24/2/2012			
		New	6	0
		Returner	2	0
	25/2/2012			
		New	5	0
	26/2/2012			
		New	4	0
		Returner	1	0

Figure 97 - Sample Visit / Lead Summary - Daily Report

Column	Description
Site	The web site which was visited.
Visit Date	The day on which the web site visit occurred.
Visit Type	"New" and "Returner" representing the type of visit recorded by target360.
No. of Visits	The total number of visits, recorded for the web site and broken down by Visit Type.
No. of Leads.	The total number of visits by known Leads, recorded for the web site and



broken down by Visit Type.

#### 7.15.3 Charts

Visit / Lead Summary - Daily Chart

The Visit / Lead Summary - Daily Chart shows time along the X-axis and total visits along the Y-axis.

Total Visits are represented by yellow bars and Visits by Known Leads are represented by blue bars. Visits are broken down by Visit Type.



Figure 98 - Sample Visit / Lead Summary - Daily Chart



## 7.16Visit / Lead Summary -Weekly

#### 7.16.1 Purpose

The Visit / Lead Summary - Weekly Report provides an analysis of visits by known Leads over a date range that you specify.

Visits are broken down by type ("New" and "Return" visits) and by week commencing. From the table you can see total site visits and then the total site visits by known Leads.

#### 7.16.2 Tables

Site	Week Commencing	Visit Type	No Of Visits	No Of Leads
Redspire.co.uk				
	30/01/2012	New	69	0
		Returner	25	0
	06/02/2012	New	93	0
		Returner	39	0
	13/02/2012	New	88	0
		Returner	49	0
	20/02/2012	New	65	0
		Returner	25	0
	27/02/2012	New	8	0
		Returner	3	0

Figure 99 - Sample Visit / Lead Summary - Weekly Report

Column	Description
Site	The web site which was visited.
Week Commencing	The week on which the web site visit occurred. The date represents the Monday of the week reported.
Visit Type	"New" and "Returner" representing the type of visit recorded by target360.
No. of Visits	The total number of visits, recorded for the web site and broken down by Visit Type.
No. of Leads.	The total number of visits by known Leads, recorded for the web site and broken down by Visit Type.



### 7.16.3 Charts

Visit / Lead Summary - Weekly Chart

The Visit / Lead Summary - Weekly Chart shows time along the X-axis and total visits along the Y-axis.

Total Visits are represented by yellow bars and Visits by Known Leads are represented by blue bars. Visits are broken down by Visit Type.



Figure 100 - Sample Visit / Lead Summary - Weekly Chart



## 7.17Visit / Lead Summary - Monthly

#### 7.17.1 Purpose

The Visit / Lead Summary - Monthly Report provides an analysis of visits by known Leads over a date range that you specify.

Visits are broken down by type ("New" and "Return" visits) and by month. From the table you can see total site visits and then the total site visits by known Leads.

#### 7.17.2 Tables

Site	Month	Visit Type	No Of Visits	No Of Leads
Redspire.co.uk				
	January	New	244	0
		Returner	127	1
	February	New	300	0
		Returner	132	0

#### Figure 101 - Sample Visit / Lead Summary - Monthly Report

Column	Description
Site	The web site which was visited.
Month	The month during which the web site visit occurred.
Visit Type	"New" and "Returner" representing the type of visit recorded by target360.
No. of Visits	The total number of visits, recorded for the web site and broken down by Visit Type.
No. of Leads.	The total number of visits by known Leads, recorded for the web site and broken down by Visit Type.



### 7.17.3 Charts

Visit / Lead Summary - Monthly Chart

The Visit / Lead Summary - Monthly Chart shows time along the X-axis and total visits along the Y-axis.

Total Visits are represented by yellow bars and Visits by Known Leads are represented by blue bars. Visits are broken down by Visit Type.



Figure 102 - Sample Visit / Lead Summary - Monthly Chart



### 7.18Visits and Leads Generated

### 7.18.1 Purpose

The Visits and Leads Generated Report provides an analysis of visits, showing the volume of new Visitors, Files Downloaded and Visiting Leads.

Leads can be seen in total and also by lead score by entering a value into the "Enter Lead Score Threshold".

#### 7.18.2 Tables

Visit Date	Number of New Visitors	Number of Downloads	Visits Identified As Leads	Leads with Score >= 0
01/02/2012	2	0	4	4
06/02/2012	1	0	2	2
07/02/2012	1	0	2	2
09/02/2012	0	0	1	1
15/02/2012	0	0	1	1
20/02/2012	1	0	1	1
21/02/2012	0	0	2	2

#### Figure 103 - Sample Visits and Leads Generated Report

Column	Description
Visit Date	The date of the visit.
Number of New Visitors	The number of new Visitors recorded.
Number of Downloads	The number of file downloads recorded.
Visits Identified as Leads	The number of Visitors identified as Leads.
Visits by Leads with a Score >= [X]	The number of Visitors identified as Leads where the Lead has a Score greater than X.
	X is the Lead Score Threshold and is entered in the parameters section at the top of the report



### 7.19Visits by Marketing Campaign

#### 7.19.1 Purpose

The Visits by Marketing Campaign Report provides an analysis of visits broken down by Campaign, Digital Route and Campaign Activity.

#### 7.19.2 Tables

Campaign	Route	Activity	Total Visits
Email Campaign			2
	🗆 Email Campaign	All Activities	2
		Mail shot to advertise TMFA Stand	2
Event Launch			1
	🗆 Twitter	All Activities	1
		Twitter Link	1
None			340
	🗆 None	All Activities	340
		None	340
None			2
	□ Google Adword	All Activities	2
		None	2
TFMA Event 2012			1
	🗆 Twitter	All Activities	1
		Twitter Support for TFMA	1

Figure 104 - Sample Visits and Leads Generated Report

Column	Description
Campaign	The Campaign which resulted in the web site visit.
Route	The Digital Route through which the Campaign was conducted.
Activity	The Campaign Activity which resulted in the web site visit.
Total Visits	The total number of visits grouped by Campaign, Digital Route and Campaign Activity.

Note: Visits not associated with a Campaign will not be shown in the report.



## 7.20Visits by Referring Page

#### 7.20.1 Purpose

The Visits by Referring Page Report provides an analysis of visits, showing unique visits against the referring page (the URL of the page preceding the visit).

The preceding page could be a search engine or another web site which has a link to your web site. If the user types the URL of your web site directly into the browser or uses browser favourites, the referrer will show as "Direct".

Results are ordered by popularity.

#### 7.20.2 Tables

Referrer	Count of Unique
	Visits
http://www.google.co.uk/url	24
Direct	10
http://www.google.com/imgres	6
http://www.google.co.uk/imgres	5
http://www.google.co.in/imgres	5
http://www.google.com/search	2
http://www.google.ru/url	2
http://www.google.co.uk/search	2
http://www.google.com/url	2
http://www.google.com.pk/imgres	2
http://uk.ask.com/web	1
http://www.google.lk/imgres	1
http://www.google.co.in/url	1
http://www.google.at/imgres	1
http://www.google.com.eg/imgres	1
http://www.google.com.my/url	1
http://www.bing.com/images/search	1
http://www.google.de/imgres	1
http://10.1.0.61:15871/cgi-bin/blockOptions.cgi	1
http://www.google.co.za/imgres	1
http://www.google.fr/imgres	1
http://www.google.co.th/imgres	1
http://www.google.com.ua/imgres	1
http://www.google.no/imgres	1
http://www.facebook.com/l.php	1

Figure 105 - Sample Visits by Referring Page Report



Column	Description
Referrer	The URL of the page preceding a visit to your web site.
	When a user visits your site directly from, say, a URL stored in their browser favourites, the Referred will be shown as "Direct".
Count of Unique Visits	A count of visits by unique individuals who visited your web site.

Note: Unique visitors are often identified by using browser cookies so an individual who logs on to the site using different browsers or computes may register as multiple individuals.



### 7.21Web Traffic Peak Times

#### 7.21.1 Purpose

The Web Traffic Peak Times Report provides a view of the peak hour of visits for each day in the reporting period as specified by you.

[Currently a Peak Hour of "00" (Midnight) is shown if there are no hits. This is based on data stored within CRM and can't be handled at the Report level. We should investigate potentially removing these misleading values.]

#### 7.21.2 Tables

Date	Peak Hour
21/02/2012	07 - 08
21/02/2012	15 - 16
21/02/2012	07 - 08
21/02/2012	15 - 16
22/02/2012	10 - 11
22/02/2012	10 - 11
23/02/2012	00 - 01
23/02/2012	16 - 17
23/02/2012	00 - 01
24/02/2012	03 - 04
25/02/2012	09 - 10
26/02/2012	01 - 02

Figure 106 - Sample Web Traffic Peak Times Report

Column	Description
Date	The day on which the web site visits occurred.
Peak Hour	The most popular hour for each day in the reporting period. Peak Hour is reported in the form "15 – 16" (this example would provide a peak hour between 3pm and 4pm).



### 7.21.3 Charts

Peak Times Chart

The Peak Times Chart shows a summary line graph with the reporting period along the X-axis and the hour along the Y-axis.

Note that the chart does not drop back to zero for days with no visits. If such a day occurs between two days with visits, a line will be drawn directly between the two non-zero points in the graph.



Figure 107 - Sample Peak Times Chart



# 8 Configuration

*target360* requires a small amount of setup in order to maximise the data accuracy and quality that the system can provide.

In order to effectively track sales leads which visit your website you should:

- Install the target360 Tracking Code JavaScript on any web site pages you wish to track;
- Configure Form Capture Fields so that your web site forms can be effectively mapped to *target360* fields within the resulting Lead record;

To leverage your existing leads you can:

• Import existing lead data target360



### 8.1 Lead Scoring

#### 8.1.1 Lead Score Configuration

The Lead Score Configuration settings can be found and edited by target360 Administrators.

Select settings360 on the bottom of the navigation bar on the left-hand-side.

Click on "Lead Score Configuration" in the Navigation Menu.



For lead scoring to work, there needs to be at least one record on the Lead Score Configuration Grid.





The Lead Score Configuration grid is shown below:

Le	ad Score Configurations	Active Lead Score Configurations 🔻					
<b>V</b>	Name 🔺	Created On					
<b>V</b>	Default	18/01/2012 13:53					

Figure 108 - An example of the Lead Score Configuration Grid.

If there are no records here then leads will not be scored.

If a record exists, open it by double-clicking; if not then create a new one by clicking on the "New" button on the Ribbon (You do not have to save the record if you do not want to implement Lead Scoring..



The Lead Score Configuration form is shown below:

Lead Score Default	Configuration			[	Lead Score Configurat	ions 🔻 🋧 🗸
General						
Name *	Default					
Values						
Route to Site - Email	5	Route to Site -	3	Chat *	3	
Phone Call -	3	Phone Call -	1	Form Capture *	10	
Incoming *		Outgoing *				
Email - Sent *	1	Email - Opened *	1			
▶ Notes						
Status	Active			Numb	er of Campaigns	43

Figure 109 - An example of the Lead Score Configuration Form

A Lead Score Configuration record will typically have a name which can be anything you wish. At the bottom of the form you will see the total number of Campaigns which have been added to target360.



#### 8.1.2 Events that can be scored

The Lead Score Configuration options available are as follows:

Route to Site - Email	Where a lead is created via an Email Activity, the points attributed here will be added to the Lead's Score.
Route to Site - Digital	Where a lead is created via an Digital Activity, the points attributed here will be added to the Lead's Score.
Chat	Where a Lead has chatted with you via the target360 chat mechanism, the points attributed here will be added to the Lead's Score. The score will increase but the point in this field for every chat.
Phone Call - Incoming	When you receive a phone call from a Lead and store that in CRM as a Phone Call activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every Phone Call activity.
Phone Call - Outgoing	When you phone a Lead and store record that event in CRM as a Phone Call activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every Phone Call activity.
Form Capture	Every time the Lead fills in a form on your web site, their score will be increased by the amount in this field.
Email - Sent	When a Lead receives an email as sent from an Email Activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every email
Email - Opened	When a Lead opens an email as sent from an Email Activity, the points attributed here will be added to the Lead's Score. The score will increase by the amount in this field for every email

If you do not wish to score certain events you can enter zero in the relevant field. For example, you may not wish to score outgoing phone calls. Simply zero or clear the field.

#### Warning

Scores can be changed at any time, and they will take effect from the next event. However all events prior to the change will NOT be re-scored.



### 8.2 Email Settings

[TODO]



# 9 Working with Existing Data

*target360* facilitates working with existing lead data that may be contained within a separate current Customer Relationship Management (CRM) system, via the import facility.

Existing lists of leads can be imported and nurtured.



### 9.1 Data Cleansing

Data should be standardised before it is ready to import so that each field in the import file contains a recognisable name, meaningful data and an appropriate name. This can be carried out within a spreadsheet program like Microsoft Excel. For example, instead of abstract names like 'Field1' and 'Field2', these should be descriptive names such as 'First Name' and 'Surname'.

If a field contains a look-up to another table, this should be changed to contain the data itself so it is meaningful in its own right. For example, a field may contain '1' as a lookup to another table with an ID of 1 and description of 'Pound Sterling'. The data to be imported should be changed to contain the description 'Pound Sterling' itself.

If a field contains more than one piece of data to be imported, this should also be broken down to contain individual elements. For example, an 'Address' field that contains the number, street name, town and post code should be separated into 'House Number', 'Street', 'Town' and 'Post Code' fields.

In summary, each field should contain, where possible, a single element of data with a recognisable name and meaningful data.



### **9.2 Importing Existing Leads**

To ensure that data import is successful and allows for the best use of data, it is worth taking time to standardize data before importing. For instructions please refer to section 2.5.1 above.

To import existing leads, please follow these steps:

1. Navigate to the leads section of *target360* by first clicking on the '*target360*' link at the bottom left hand side of the screen and selecting 'Leads' under the 'My Work' Section.



Figure 110 - The Lead button within the Navigation Pane

2. Locate the 'Import Data' icon located in the top ribbon, as shown below.

He	Leads	View	Charts	Add											
New	Eat.	Activate	Merge	Quality	Send Direct Add to Marketin	G Connect	33 Assign	Copy a Link .	S* Follow	Ø Run Workflow	Start Dialog	Report.	Import Data -	Filter	Advanced Find
	F	ecords		Actions		Celt	aborate			Proc	155		~	Data	

Figure 111 The Import Data Button on the Application Ribbon



**3.** Click 'Import Data' followed by the 'Import Data' sub-link.




**4.** Select the data file created which contains the existing leads. Click on 'Browse...' and navigate to the relevant file.



Figure 112 - The Upload Data File Form

Once you have located the file click 'Next'.



**5.** The file name and size should now appear. You should not have to edit any Delimiter settings if you followed the steps to standardize your data.

1.

**6.** Click 'Next' and the 'Review File Upload Summary' will appear as shown below.

1 file uploaded.	
File Name	Size
Intellis Lead.csv	2,399 KB

Figure 113 - The Review File Upload Summary Form

**7.** On the 'Select Data Map' form, select 'Default (Automatic Mapping)' under the 'System Data Maps' header and click 'Next' as shown below.



Select Data Map	@ <u>H</u> elp
Before your data can be imported, it must be mapped to the data in Microsoft system map your data automatically, or you can select a data map to specify ho	Dynamics CRM. You can let the w your data will be imported.
System Data Maps	
Default (Automatic Mapping)	
For Generic Contact and Account Data	
SampleDataMap	
Data Maps for Salesforce.com	
For Contact and Account Report Export	
For Full Data Export	
For Report Export	
Data Maps for Microsoft Outlook Business Contact Manager For BCM 2010	



8. Select how *target360* imports the data by choosing 'Lead' in the drop-down list and click the 'Next' to continue.

Figure 115 - Mapping your fields to target360 fields

**9.** Map each imported field to the corresponding field in *target360* by selecting the appropriate field from each drop-down list. If the data is standardised prior to importing then no changes should be required. Check that the mappings are correct and click 'Next'.



🛕 Map the unmapped fi	elds, and then continue.						
Record Types	Source Fields	CRM	/ Fields	Show All			
🛕 Lead	Required Fields						
	Company Name   Company Name			lame			
	Last Name 💌		Last Name Topic				
	Topic						
	Optional Fields						
	Activities		Activities				
	Annual Revenue		Annual Revenue				
	Bounced	3	Bounced	Two Options)	•		
	Business Phone		Business F	hone	•		
	Campaign Interest	3	Campaign	Interest (Optic	•		
	City		City		•		
	Count		Count		•		
	Country/Region		Country/R	egion	•		
	Currency	3	Currency (	Lookup)	•		
	Description		Descriptio	n	•		

Figure 116 - Data Mapping Form

**10.** Click on 'OK' to ignore all fields that were not mapped in the previous step.



**11.** A confirmation box will then appear, to ensure that everything is correct. If everything looks as expected, click 'Next'.



Revie	w Mapping Summary	@ <u>H</u> elp
The da Dynam	ata from the source files has been so nics CRM. The data is ready to impo	uccessfully mapped to the target record types and fields in Microsoft rt.
	Source Data Files	Microsoft Dynamics CRM Record Types
1	Intellis Lead.csv	Lead

Figure 117 - The Review Mapping Summary Form

12. Finally, the 'Review Settings and Import Data' form will appear. To facilitate the de-duplication of records, select either 'Yes' or 'No' under the 'Allow Duplicates' frame. The owner of the record can then be selected which, by default, is the logged in user. Finally, the data map can be saved with a name, which can be re-used for future imports. Once the relevant options have been chosen, click 'Submit'.

	ta	🕜 <u>H</u> el
eview the default settings, make the n	ecessary changes, and submit the data for import.	
Allow Duplicates		
O No		
Yes		
Duplicate records will be determined b in Microsoft Dynamics CRM.	based on the duplicate detection settings	
elect Owner for Imported Records		
S Dave Burrell		
This user will own the imported record information or if the records cannot be	ds if the records do not contain owner e assigned to the specified owners.	
ata map Name (optional)		
Save this data map for future imports.		

Figure 118 - Data Import – Review Settings

**13.** The import confirmation is sent. Depending on the amount of data imported, this can take some time to process. To view the status of an import during this process, click on 'Imports' in the text shown below.



Congratulations! Your data has been submitted for import.
 To check the status of the import, see <u>Imports</u> in the Workplace area.

Figure 119 - Confirmation of Success



## 9.3 Troubleshooting

## 9.3.1 Marketing

## 9.3.1.1 Links in a Marketing Email do not work in Apple Mail.

When constructing an HTML Email Template, you may have inserted the links without the protocol. In this case Apple Mail will prepend the link with "x-msg://2/" which will break it.

You can view the HTML source of the email to confirm whether this is indeed the problem.

To solve this problem and make emails as compatible as possible please include the protocol (e.g. "http://" or "https://").

A fix will be included within *target360* to prepend the URL with the protocol where it is missing. However it will assume "http://" and not every system is set up correctly to automatically transfer this protocol to "https://" should the site require a secure connection.

It is always better to be precise with your URLs to ensure maximum compatibility.

