target360

User Manual

1.8.7

Contents

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:

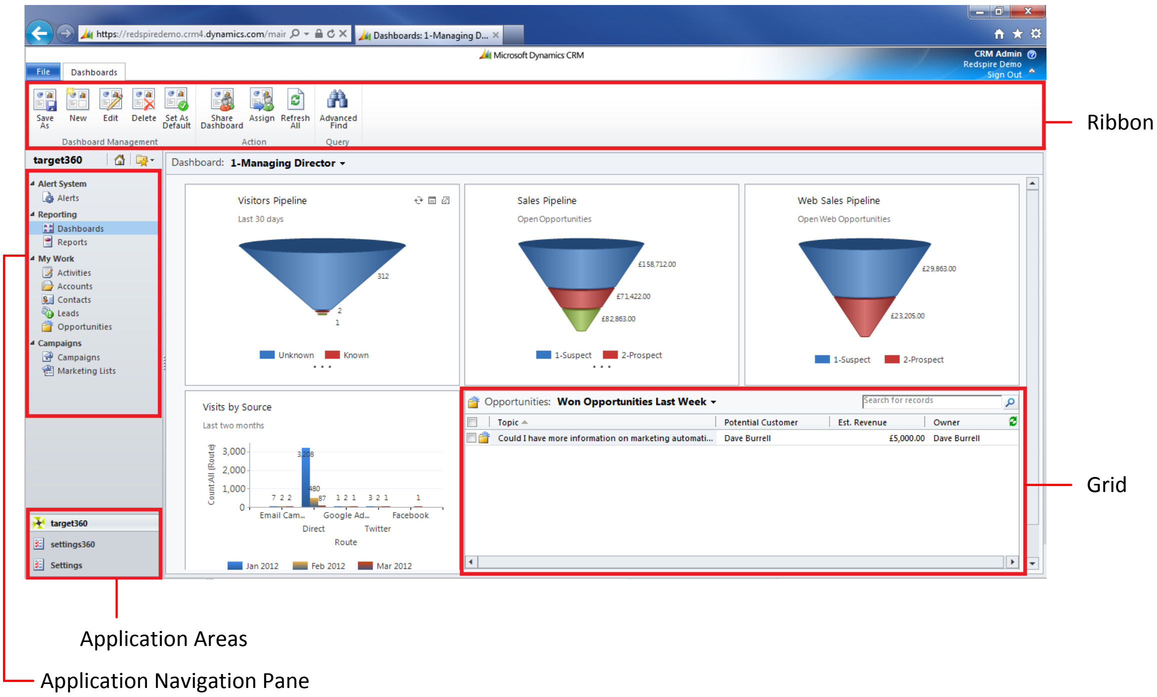


Figure 1 - The Important Areas of the target360 Application

Introduction

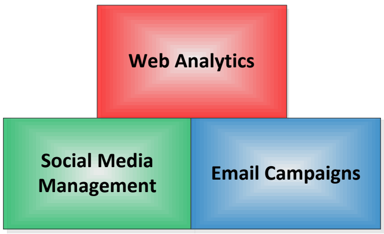
Congratulations in purchasing ***target360***, the software product that unifies and measures your company's sales and marketing. This is the user manual for the system and contains the main features with relevant screenshots and descriptions to allow you to navigate your way around and make the most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

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:

- http://www.target360.com

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:

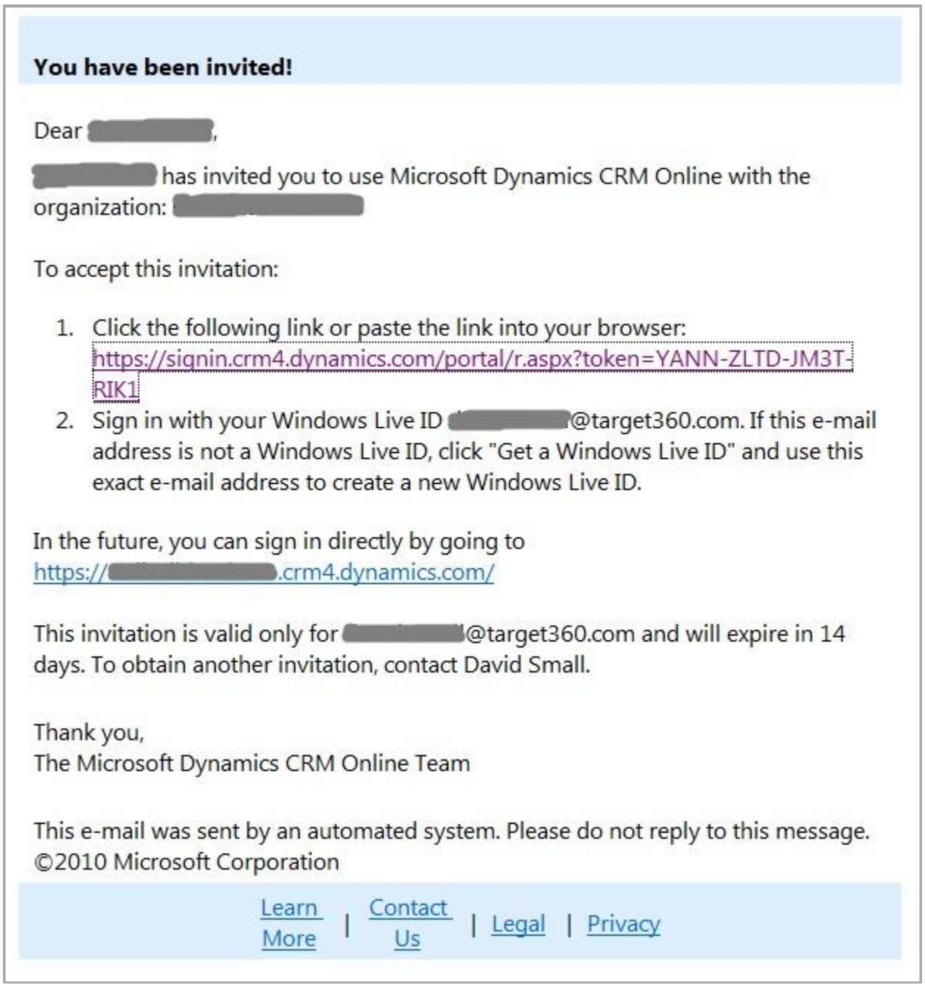
- http://www.target360.com/resources/training

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:



You have been invited!

Dear [redacted],

[redacted] has invited you to use Microsoft Dynamics CRM Online with the organization: [redacted]

To accept this invitation:

1. Click the following link or paste the link into your browser: https://signin.crm4.dynamics.com/portal/r.aspx?token=YANN-ZLTD-JM3T-RIK1
2. Sign in with your Windows Live ID [redacted]@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 the future, you can sign in directly by going to https://[redacted].crm4.dynamics.com/

This invitation is valid only for [redacted]@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.
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Figure 2 - Windows Live Invitation

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

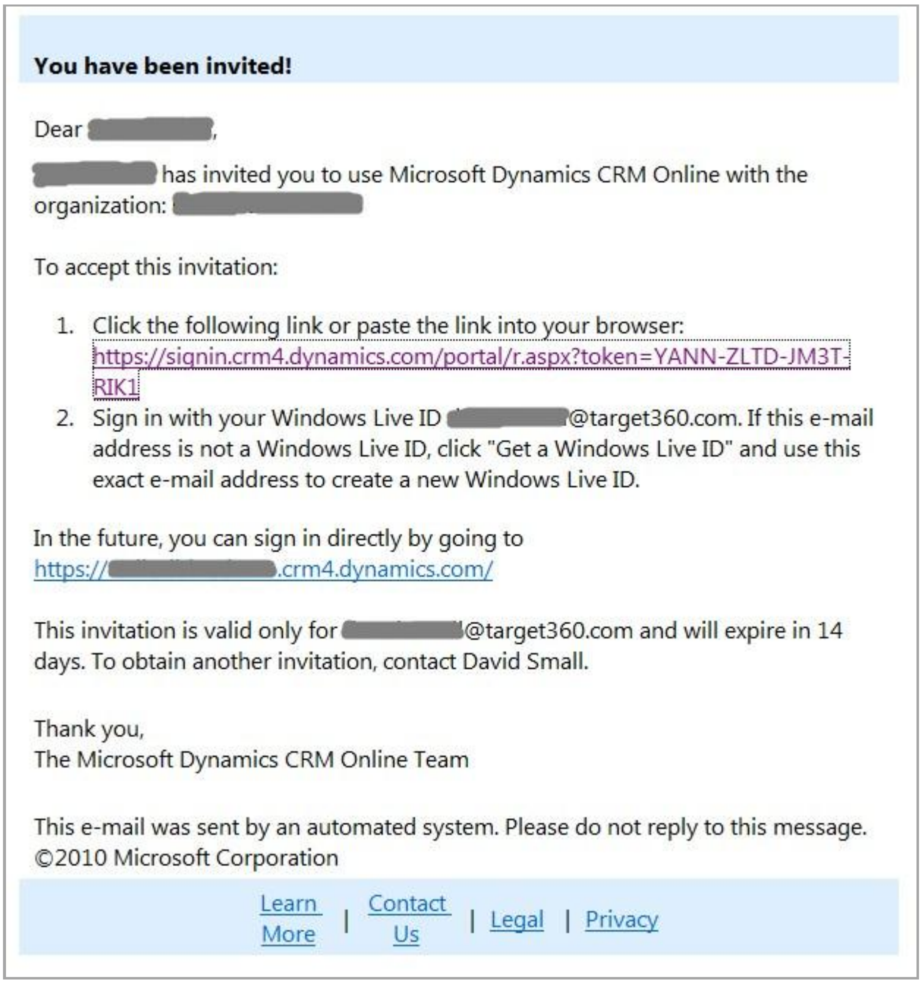
First Login – Online Access

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 [redacted],

[redacted] has invited you to use Microsoft Dynamics CRM Online with the organization: [redacted]

To accept this invitation:

1. Click the following link or paste the link into your browser: https://signin.crm4.dynamics.com/portal/r.aspx?token=YANN-ZLTD-JM3T-RIK1
2. Sign in with your Windows Live ID [redacted]@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 the future, you can sign in directly by going to https://[redacted].crm4.dynamics.com/

This invitation is valid only for [redacted]@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.
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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).

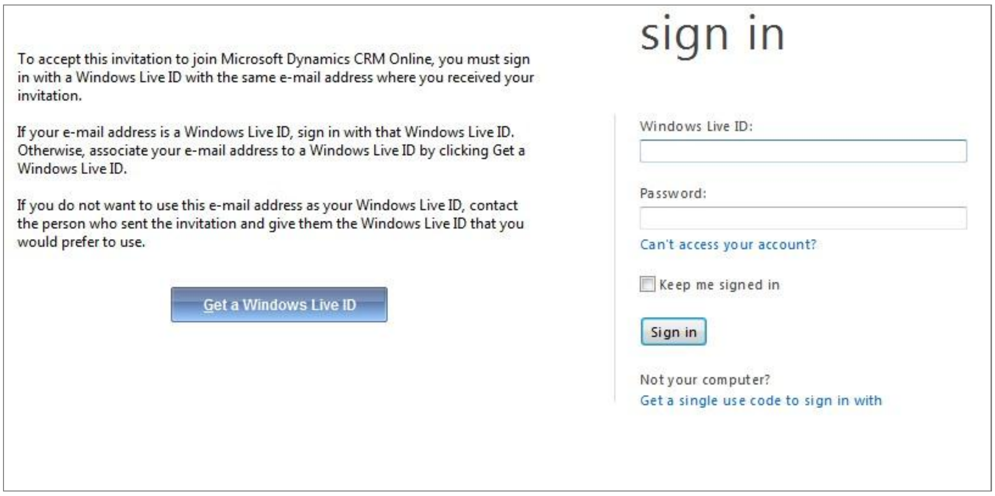


Figure 4 - Windows Live ID Login Screen

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.

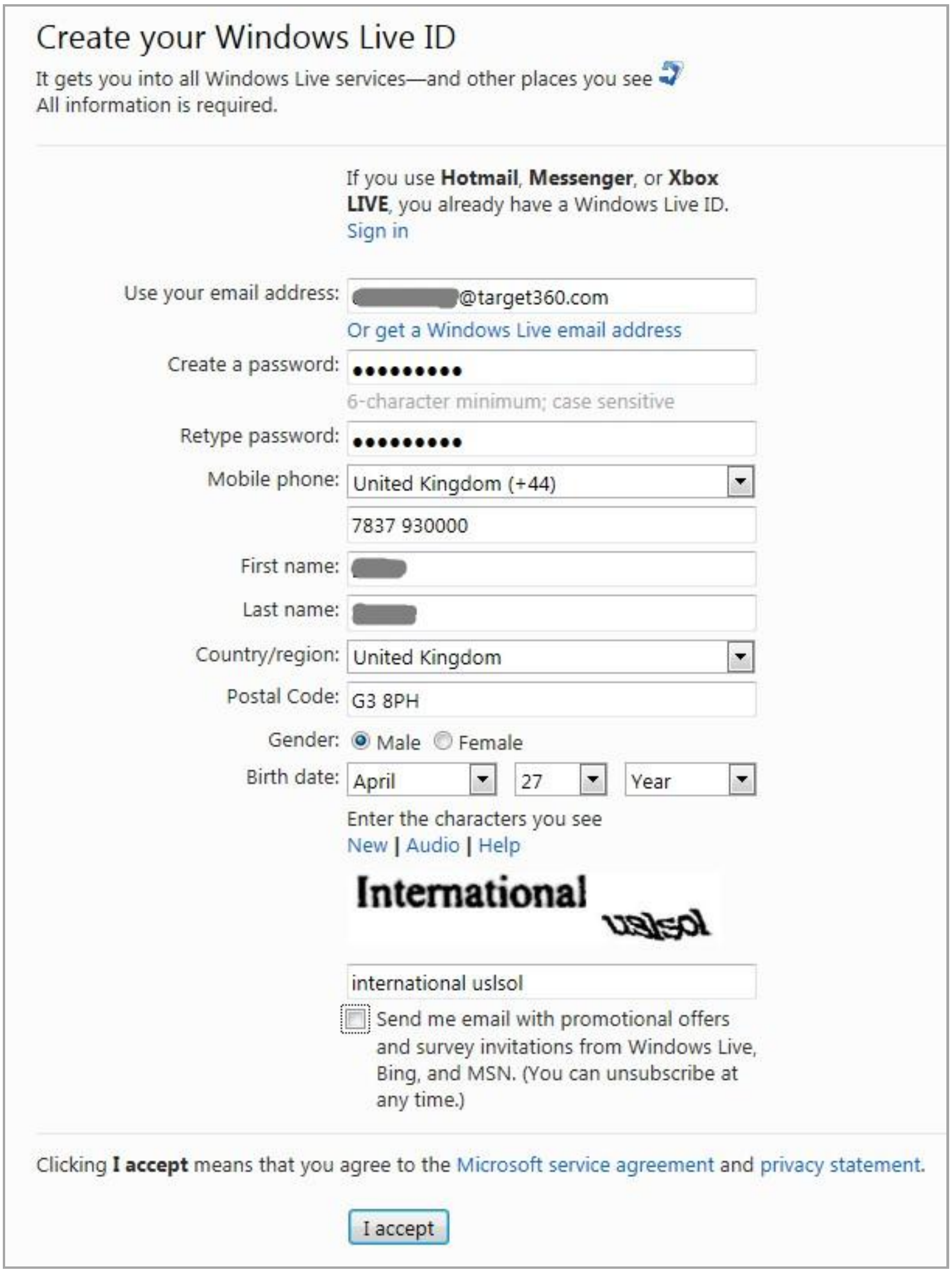


Figure 5 - Create a Windows Live ID

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.

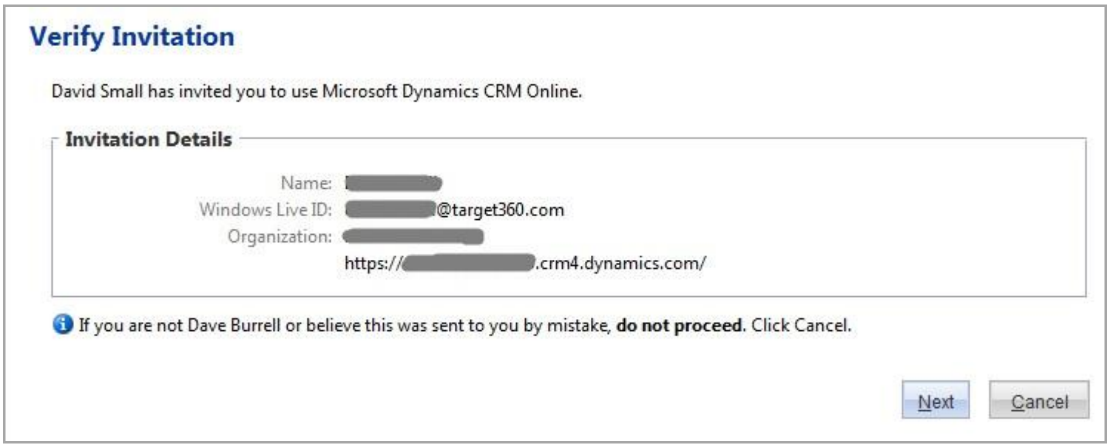


Figure 6 - Windows Live ID Verification Email

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.

5. 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***.

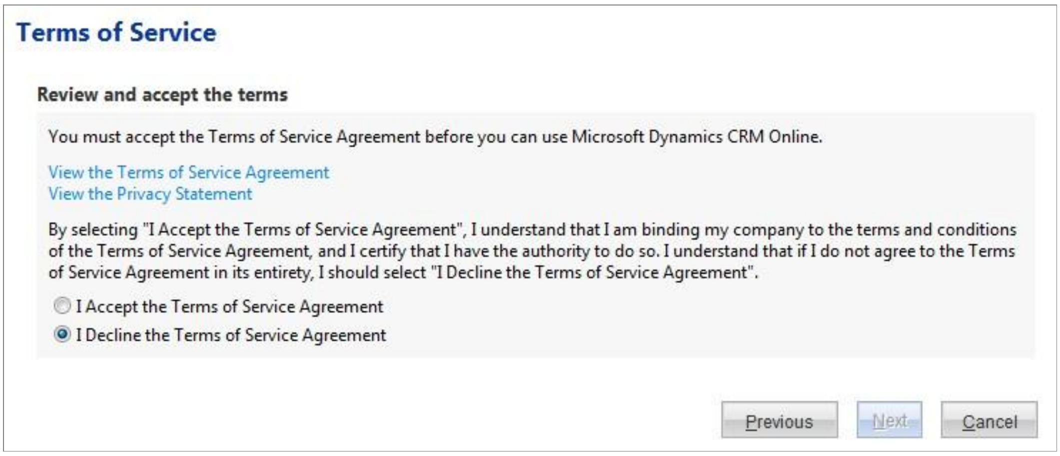


Figure 7 - Windows Live ID Terms & Conditions

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.

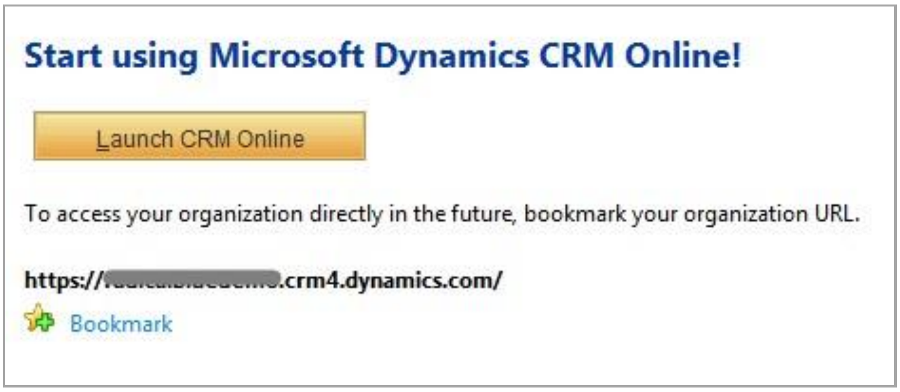


Figure 8 - Launch CRM Online

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:

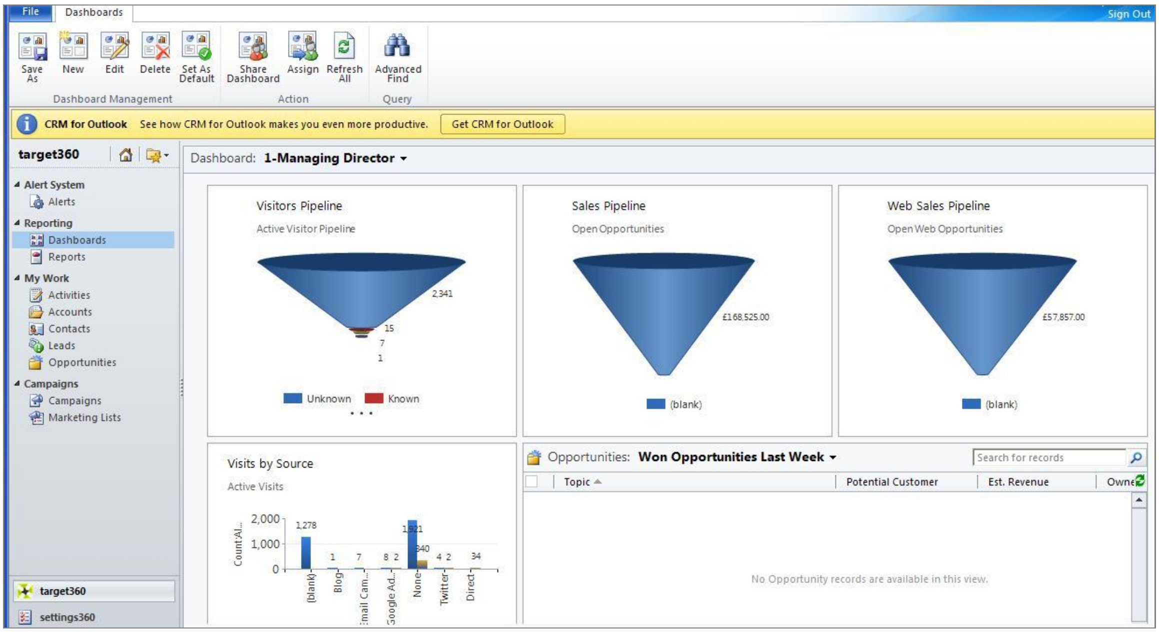


Figure 9 - target360 Home Page

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:

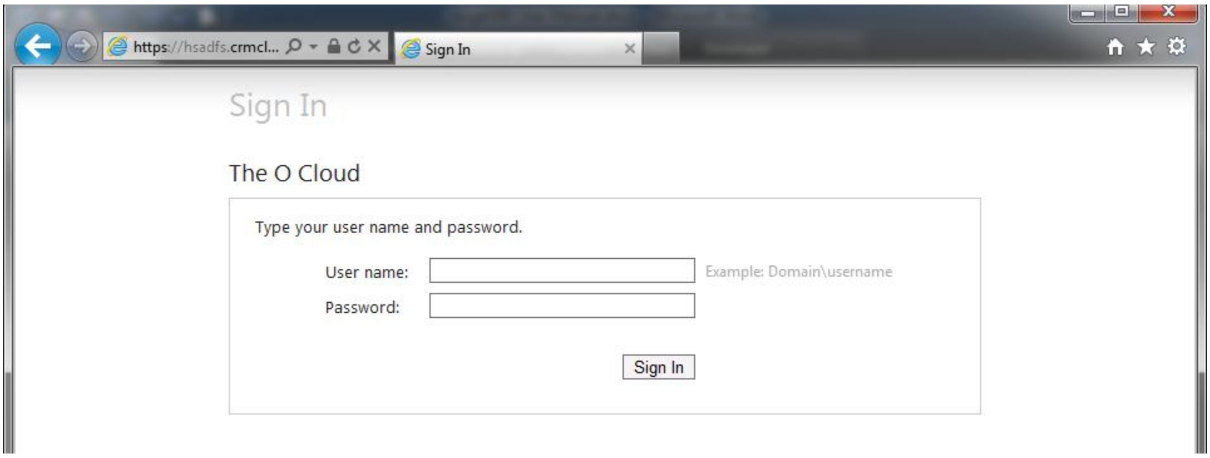
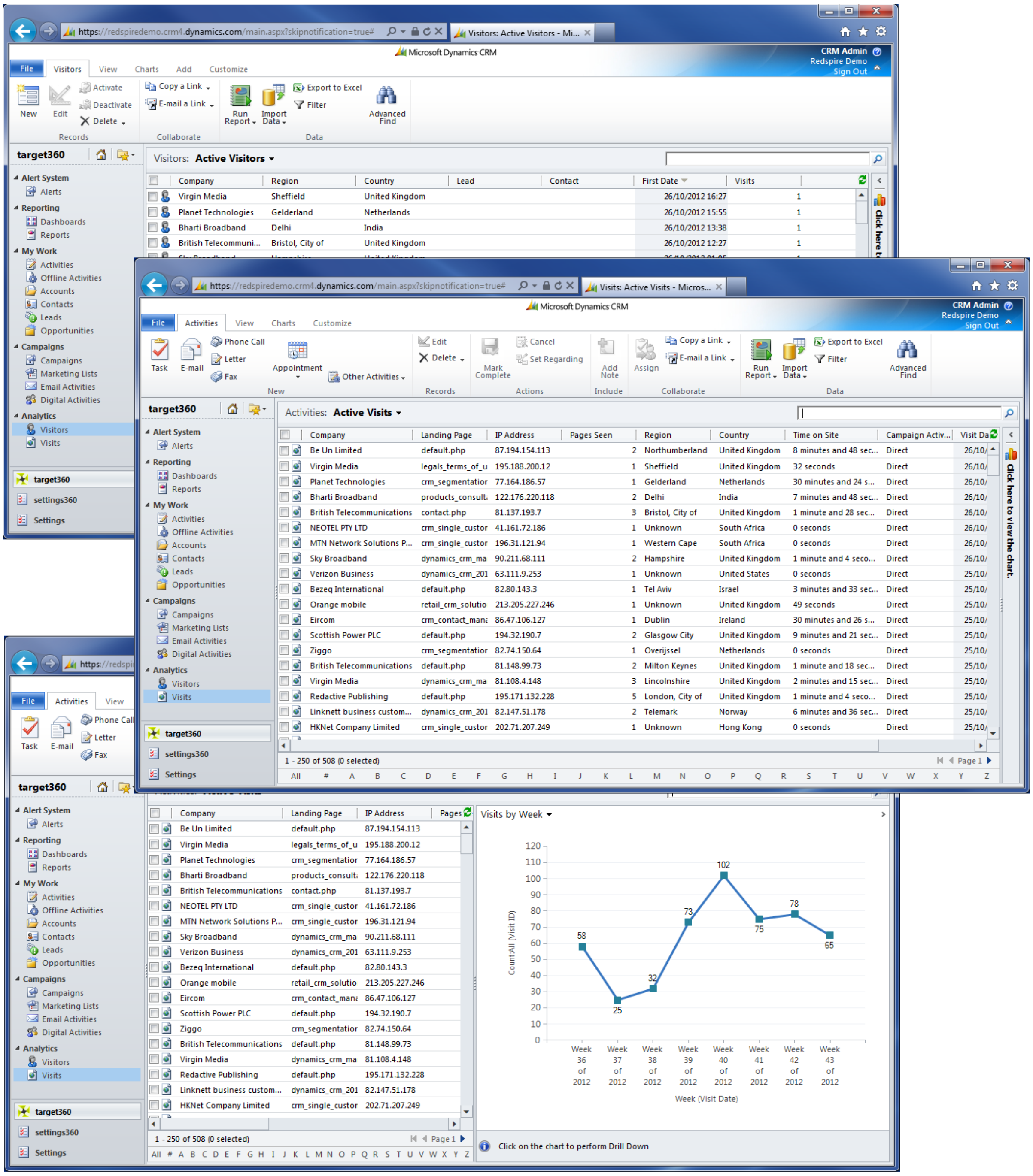


Figure 10 - target360 Login Screen

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.

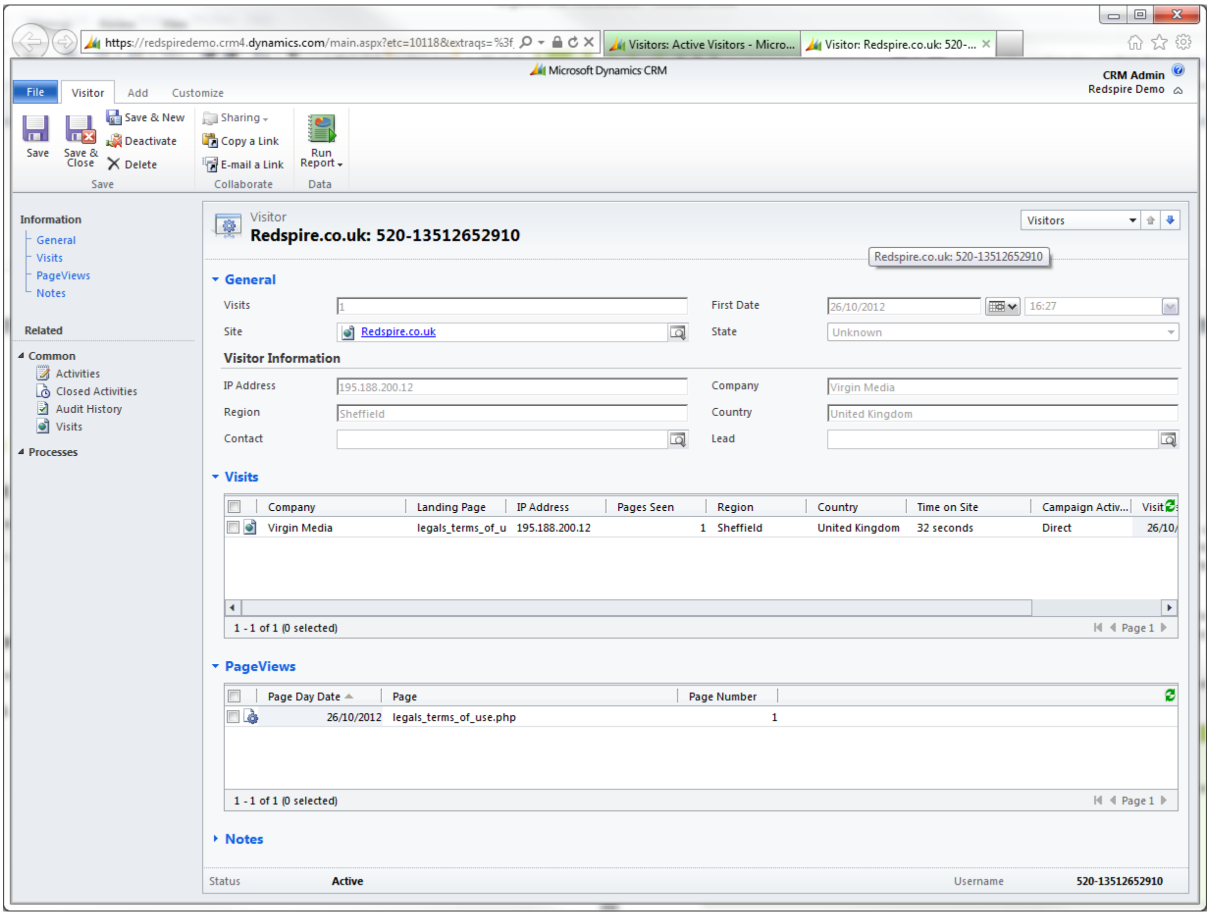


Figure 11 - The Visitor Form

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.

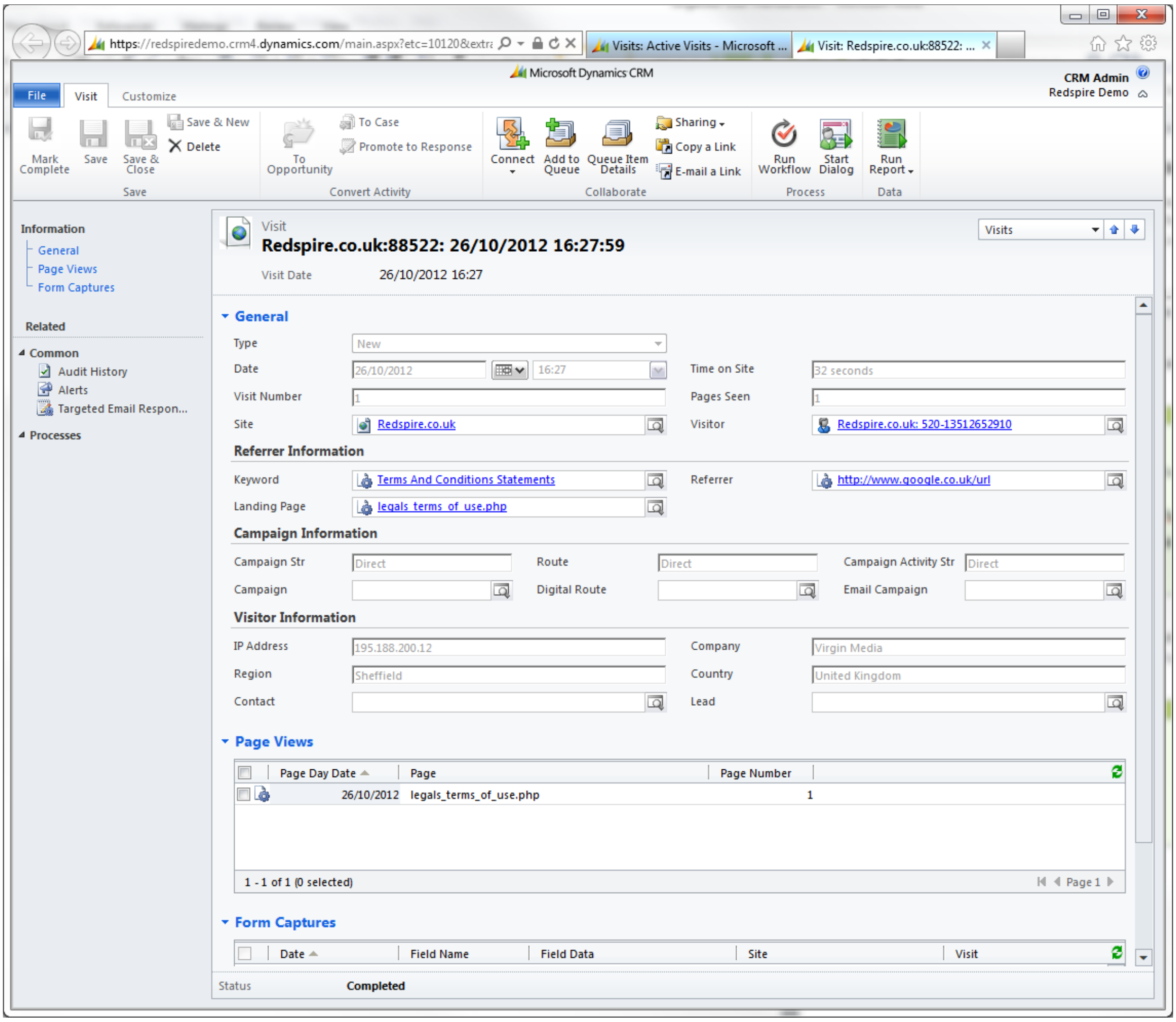


Figure 12 - The Visit Form

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.

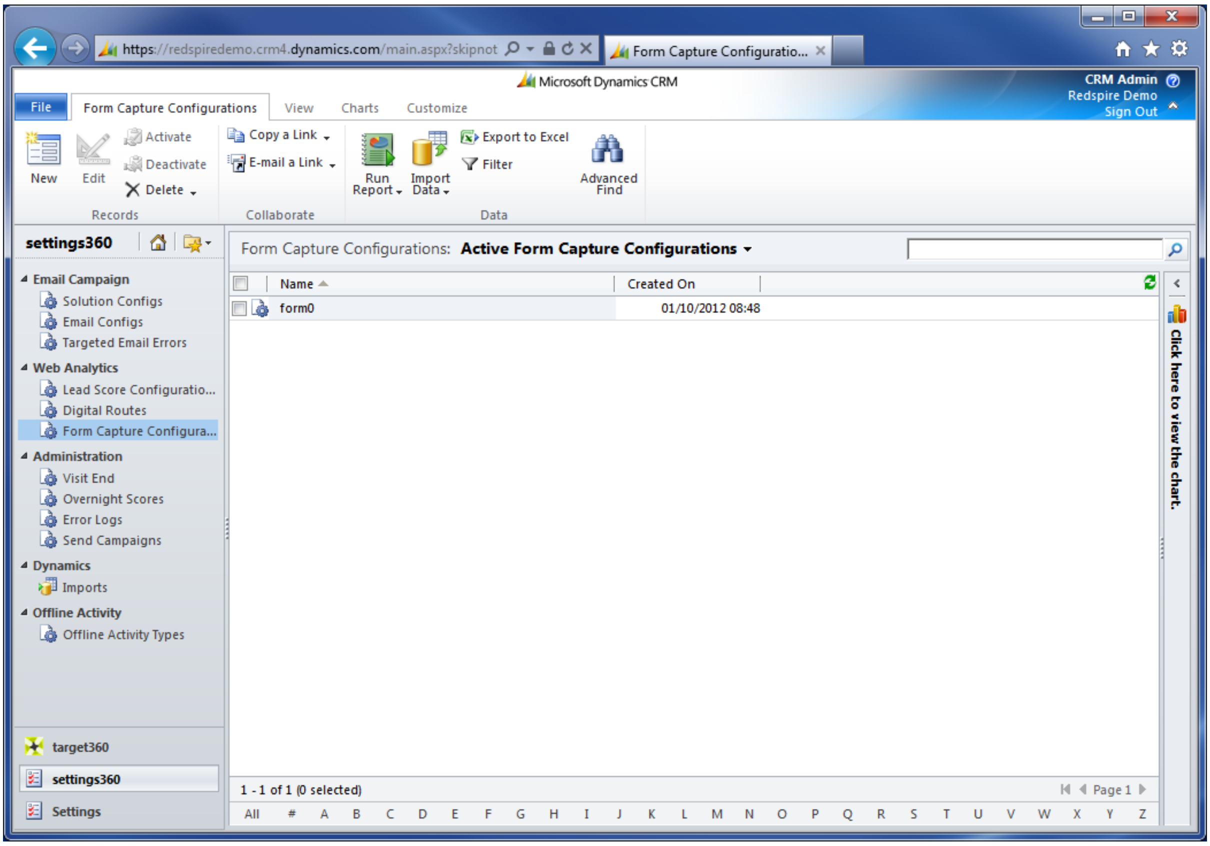


Figure 13 - The Form Capture Configuration Grid

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>

<!-- 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>
<head>
</head>
<body>

[WEBSITE CONTENT]

</body>
<html>
```

Website with Code

```
<html>
<head>
</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>
<html>
```

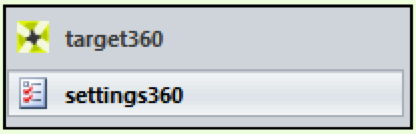
If you experience any issues with code placement please contact your account manager or support via email on support@***target360***.com.

1.5.2 Walkthrough: Form Capture Configuration

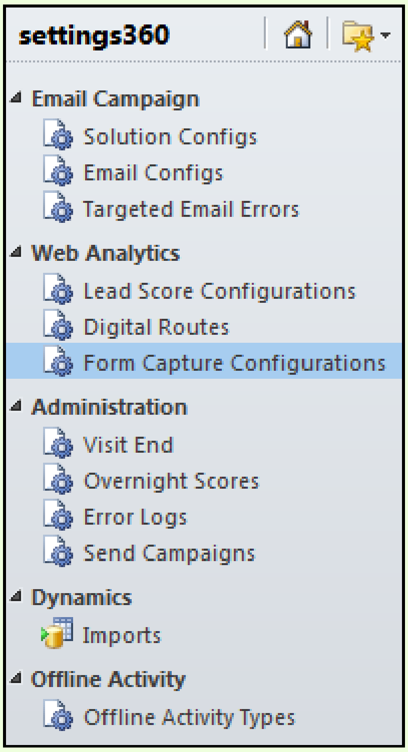
In order for ***target360*** to track your potential customers' website visits and store them as sales leads, they will need to fill in a form on the website.

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:

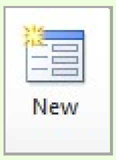
1. Click on 'settings360' on the bottom of the navigation bar on the left-hand-side. You will only have access to these settings if you have the correct permission to do so i.e. set up as a Managing Director, Marketing Manager or Sales Manager.



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.



4. You will now see all the fields from which you will be able to point your website data, as displayed below.

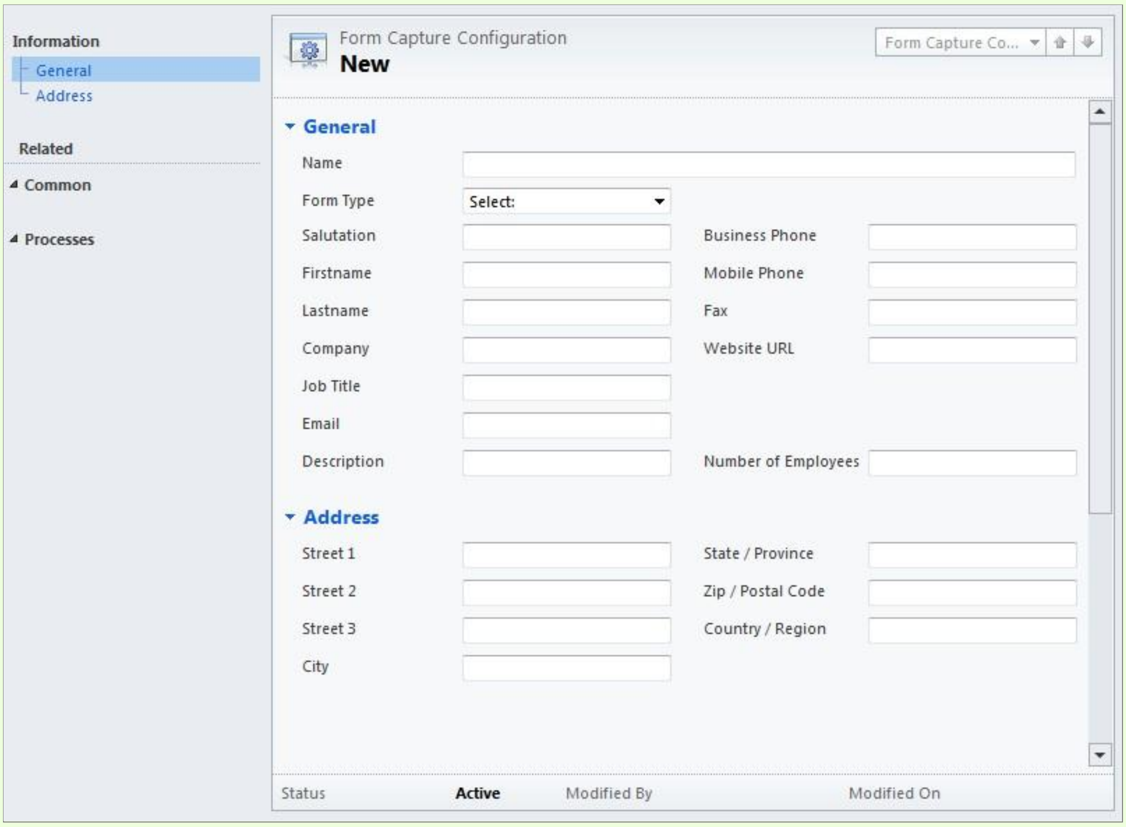


Figure 14 - Form Capture Configuration Form

5. Go to the webpage that contains your form, for example www.radicalblue.co.uk/contact/, by typing in the URL.

Figure 15 - Type you web form into the Browser

6. The next stage is to identify the name of each field on your form as well as the form name itself. You can do this by looking at the form source from your browser's options. However, a much quicker and effective way is to use a small tool designed to show you form details. For this, you will need to download and install Google Chrome (https://www.google.com/chrome/)

   In addition you Google Chrome you also need to install the Web Developer Toolbar (https://chrome.google.com/webstore/detail/bfbameneiokkgbdmiekhjnmfkcnldhhm). Once you have installed Chrome and Web Developer, a small "Gear" icon will appear next to the address bar as shown below. Click on this icon.

Figure 16 - The Web Developer Toolbar Icon

7. Click on the forms tab and you will be presented with an array of options. Click 'Display Form Details'.

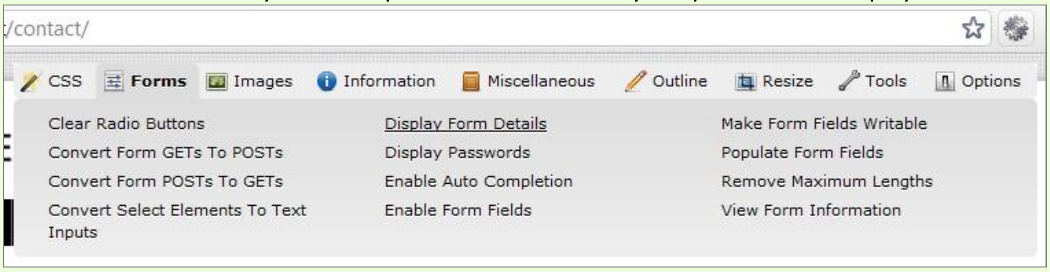


Figure 17 - The Web Developer Toolbar Options

8. The text next to each form field will now be highlighted. Each data field name (denoted by 'name = "<field>"') is required to be entered into the ***target360*** form for the data to be correctly placed in the correct fields.

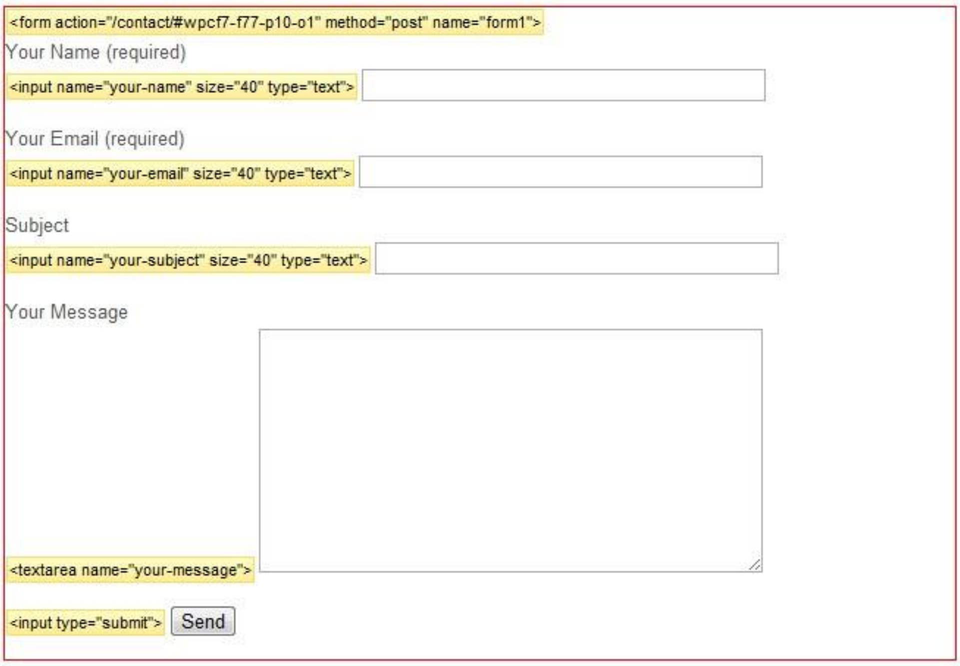


Figure 18 - Sample Form Details Panel

9. On navigating back to ***target360***, enter the details to allow the system to correctly map the data, as described above. One of the most important fields in the form is 'form type' which allows more for more accurate tracking of data capture by tying a specific meaning to a form type e.g. the 'Newsletter Signup' template can be assigned to news letter data capture.

10. You will need to enter the details captured from the Web Developer tool exactly as they appear or the data will not capture correctly. For example 'Name' needs to be correct or it will not capture any details into ***target360***. You must enter the name from the form exactly as it is (case sensitive).

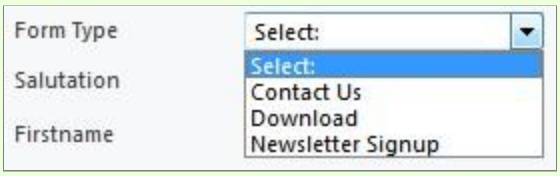


Figure 19 - Selecting a target360 Form Type

11. You now need to enter all the other fields you wish to map to the system.

    Ideally your form should contain a first name and last name field. If however your form only contains a name field you should enter this in the last name field.

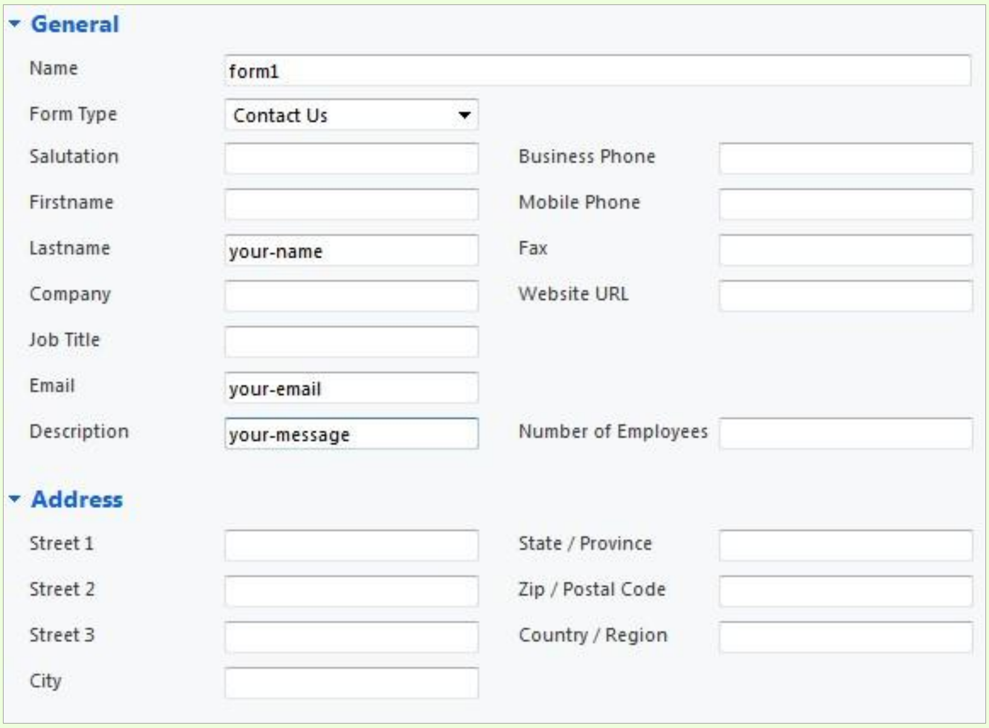


Figure 20 - The Form Capture Configuration Form

12. Click on ‘Save’ at the top left of the form.

13. Your form will now appear in the list of form capture configurations.

Figure 21 - The Form Capture Configuration Grid

14. To ensure you have correctly configured the form capture it is advised to enter some test data and double check the information is captured into ***target360***.

Figure 22 - Example of a Sample Form Test

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.

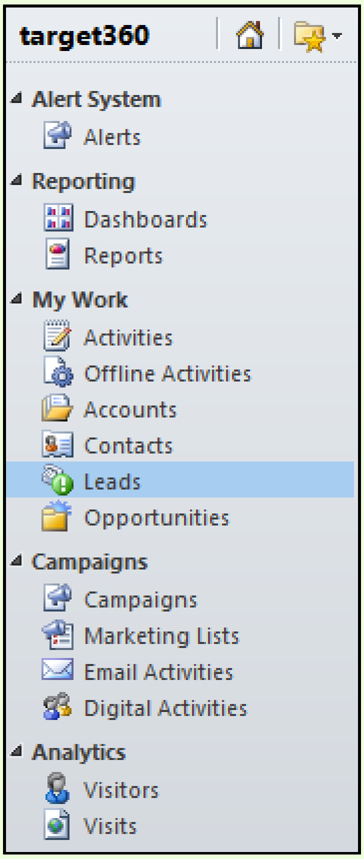


Figure 23 - The Lead button within the Navigation Pane

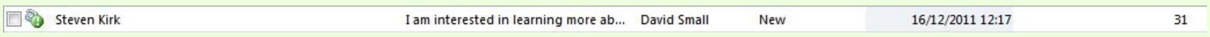


Figure 24 - The resulting Test Lead record within target360

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.

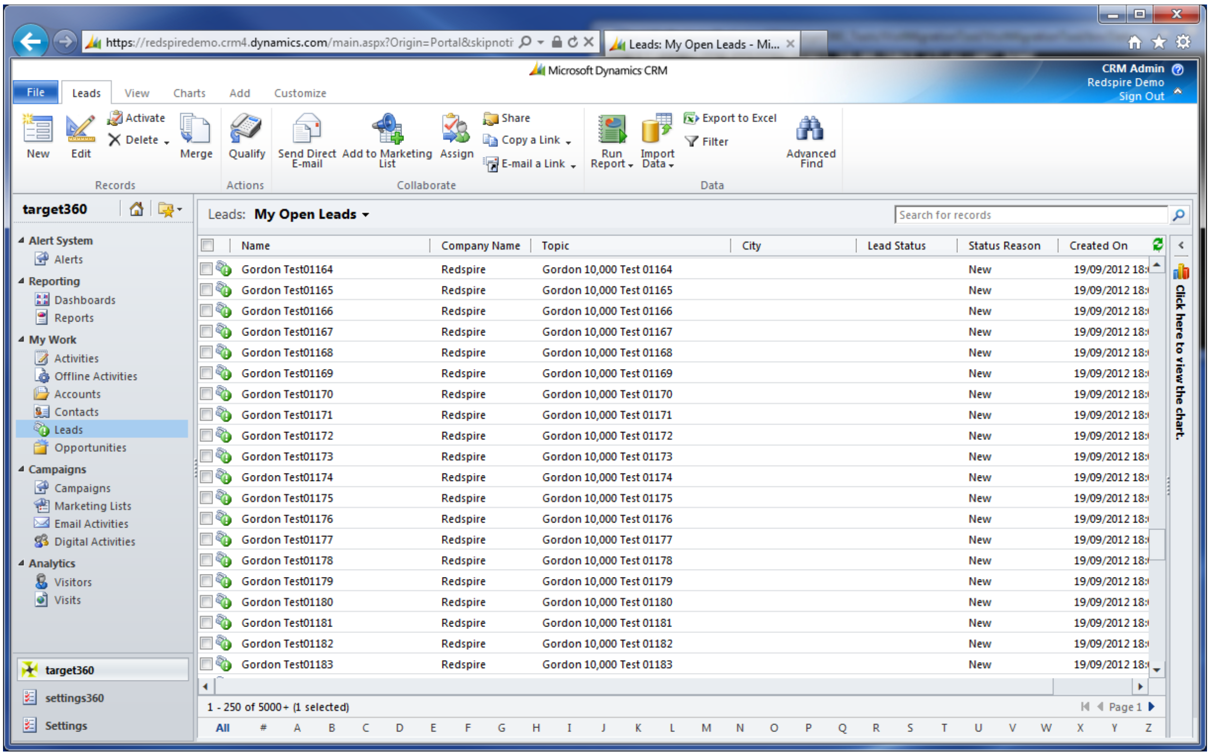


Figure 25 - My Open Leads

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.

Note
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.

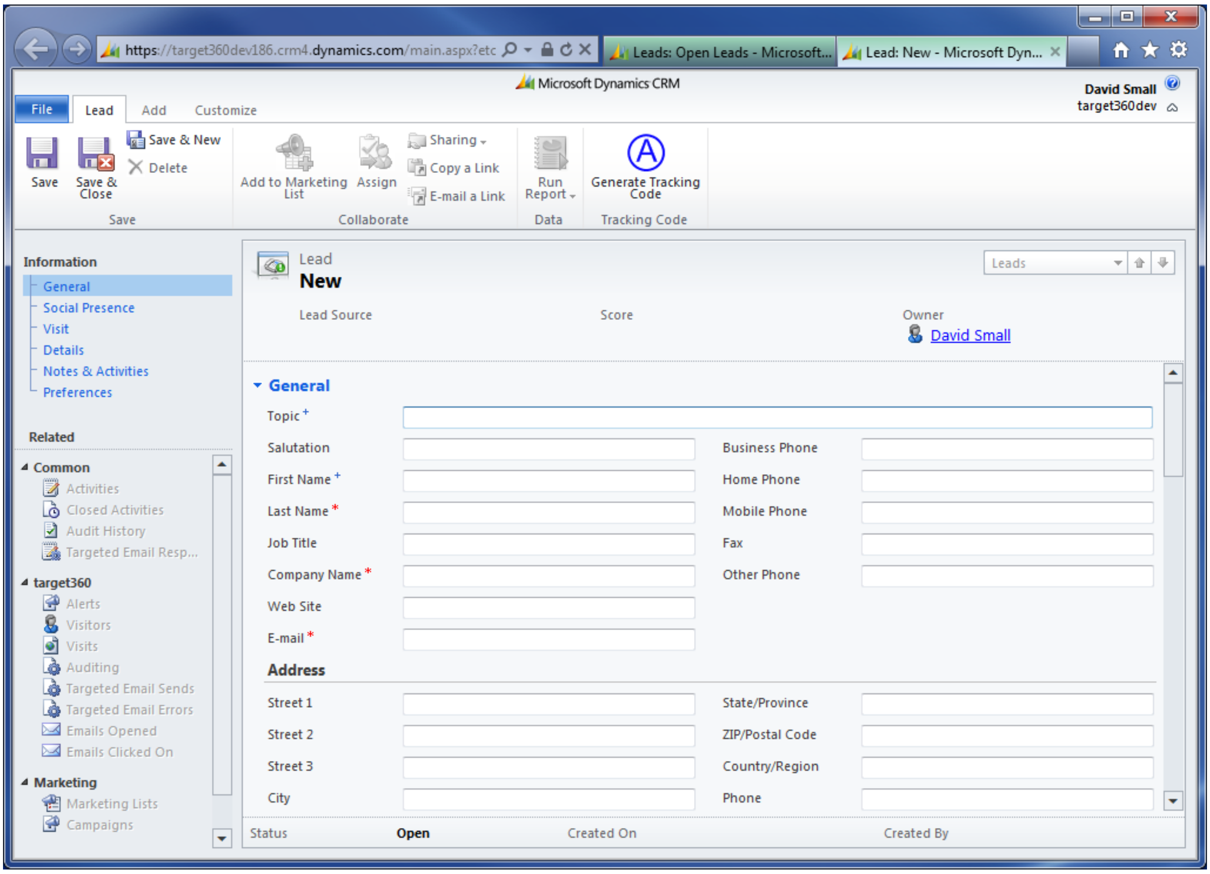


Figure 26 - New Lead Form

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.

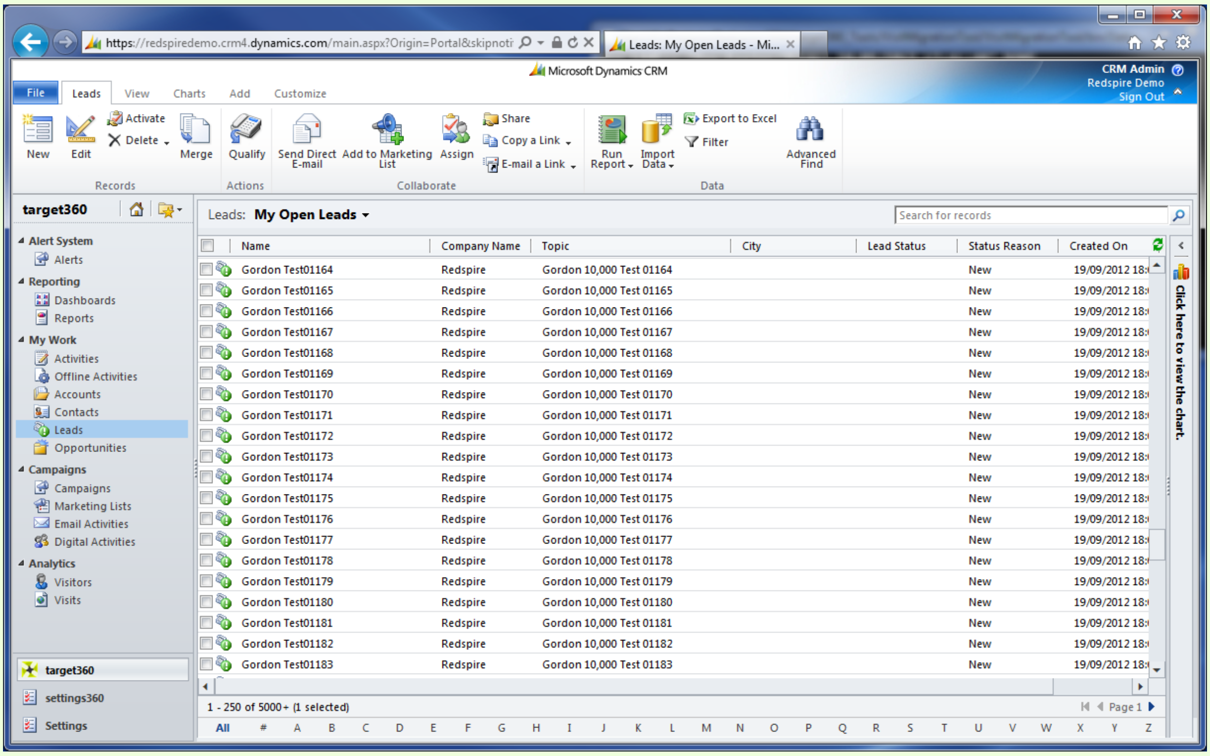


Figure 27 - The Leads Grid

2. Click on the 'New' button on the Ribbon:

3. Enter the new Lead’s details:

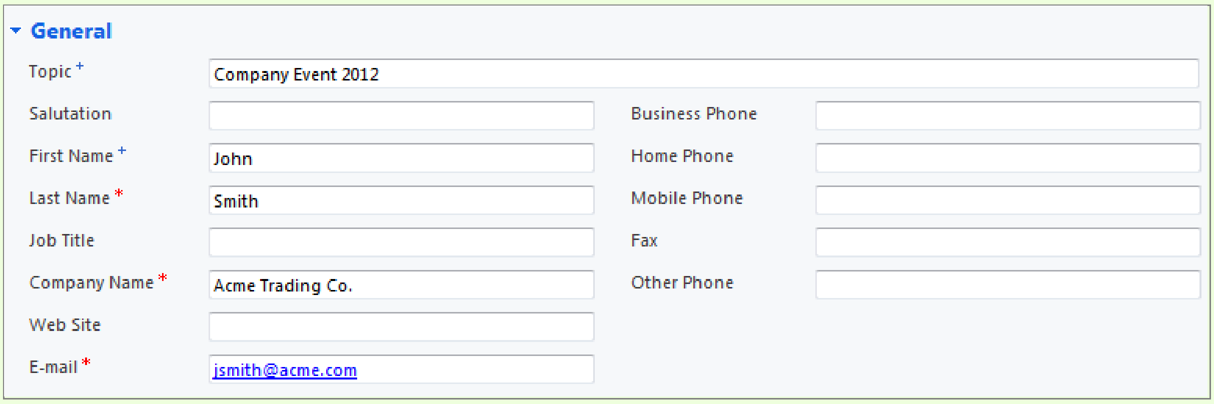


Figure 28 - The General Section of the Lead Form

4. Click on the ‘Save’ or ‘Save & Close’ button on the Ribbon to add the record to ***target360***.

NOTE: You can find the record by entering ‘Company Event 2012’ into the Quick Search box.

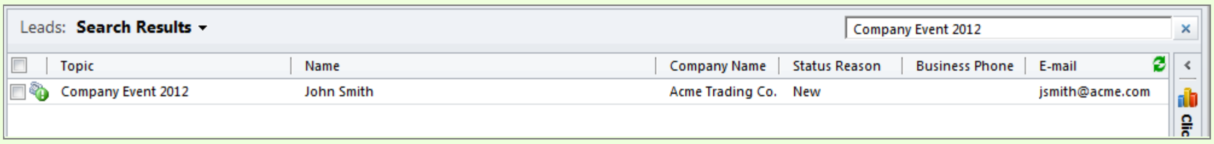


Figure 29 - Using Quick Search

This concludes the walkthrough.

You can keep the created Lead for use in later 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.

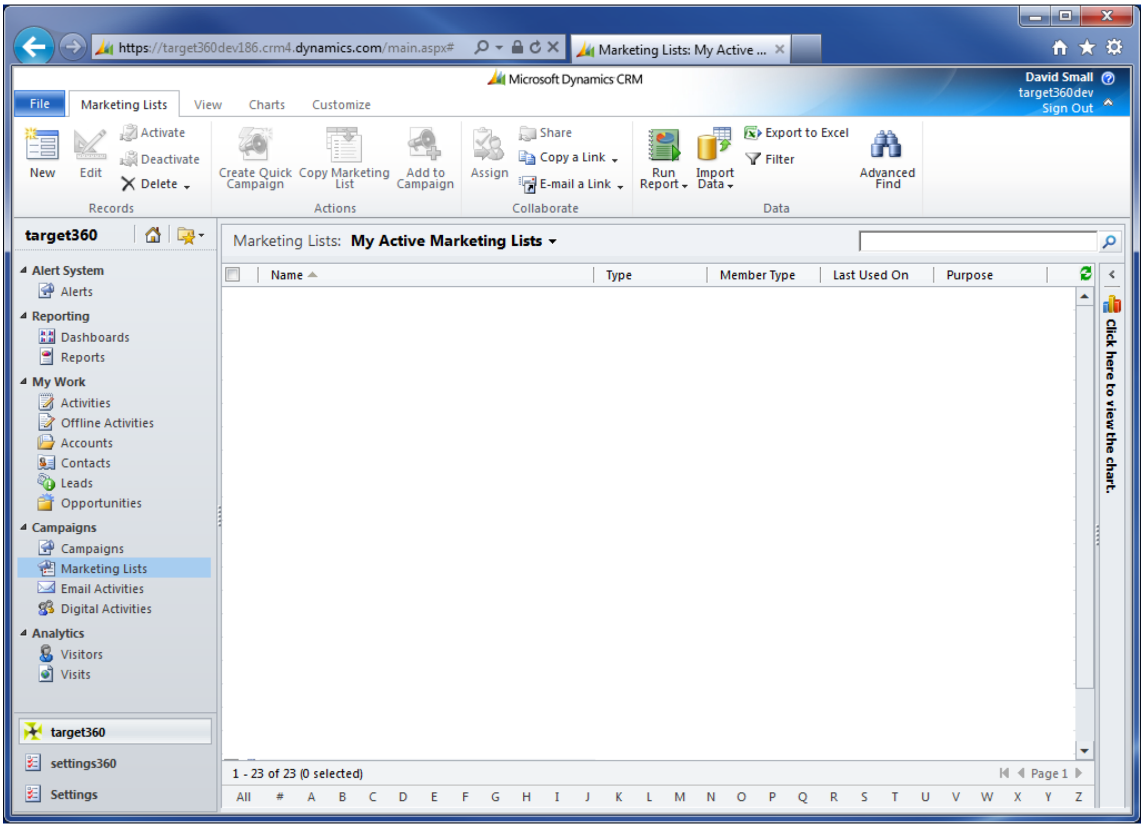


Figure 30 - The Marketing Lists Grid

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).

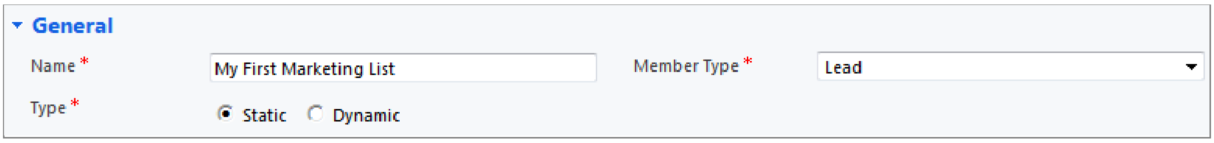
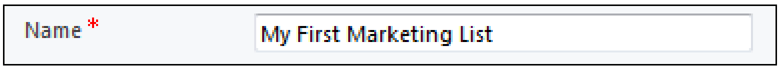
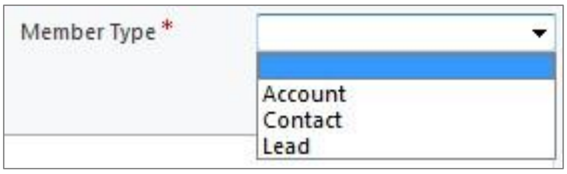


Figure 31 - New Marketing List Form

Name	The name of the 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: • **Account** – A company • **Contact** – An existing customer • **Lead** – A prospect  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.

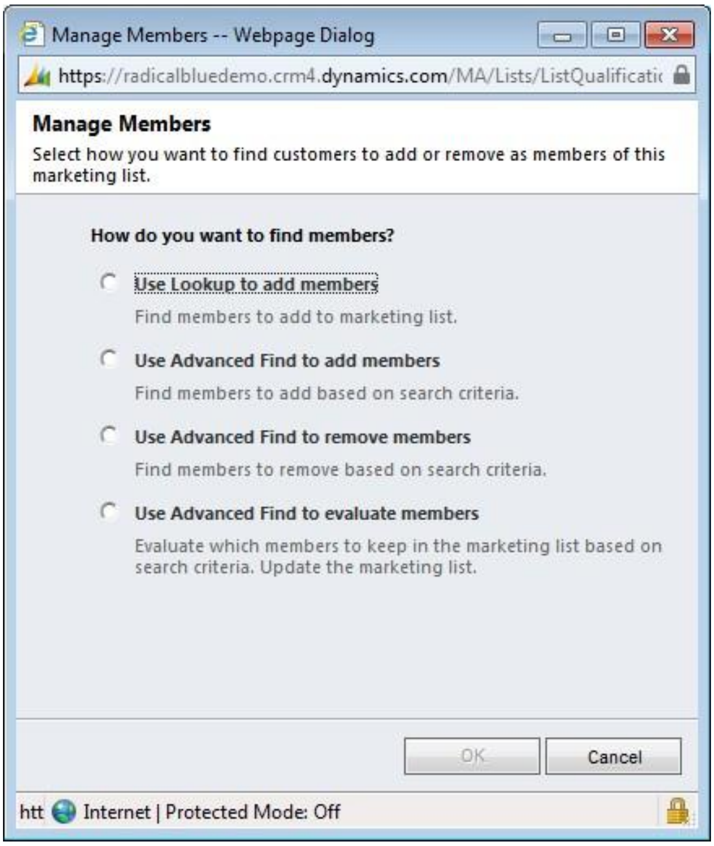
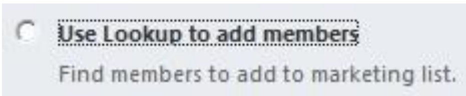
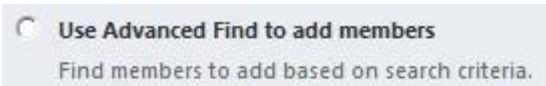


Figure 32 - Manage Members Form

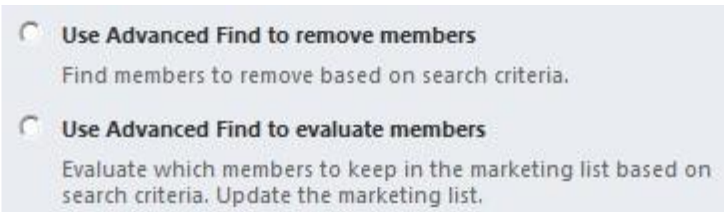
'Use Lookup to add members' provides a search for members based on their name or company. This is a very basic search function.



'Use Advanced Find to add members' is a more in depth search tool that allows you to filter your search results based on an unlimited number of criteria. You are able to filter on virtually any data that you hold on a lead, account or contact.



In addition to adding members you are able to use the same search functions to remove members i.e. 'Use Advanced Find to remove members' and 'Use Advanced Find to evaluate members'.



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.

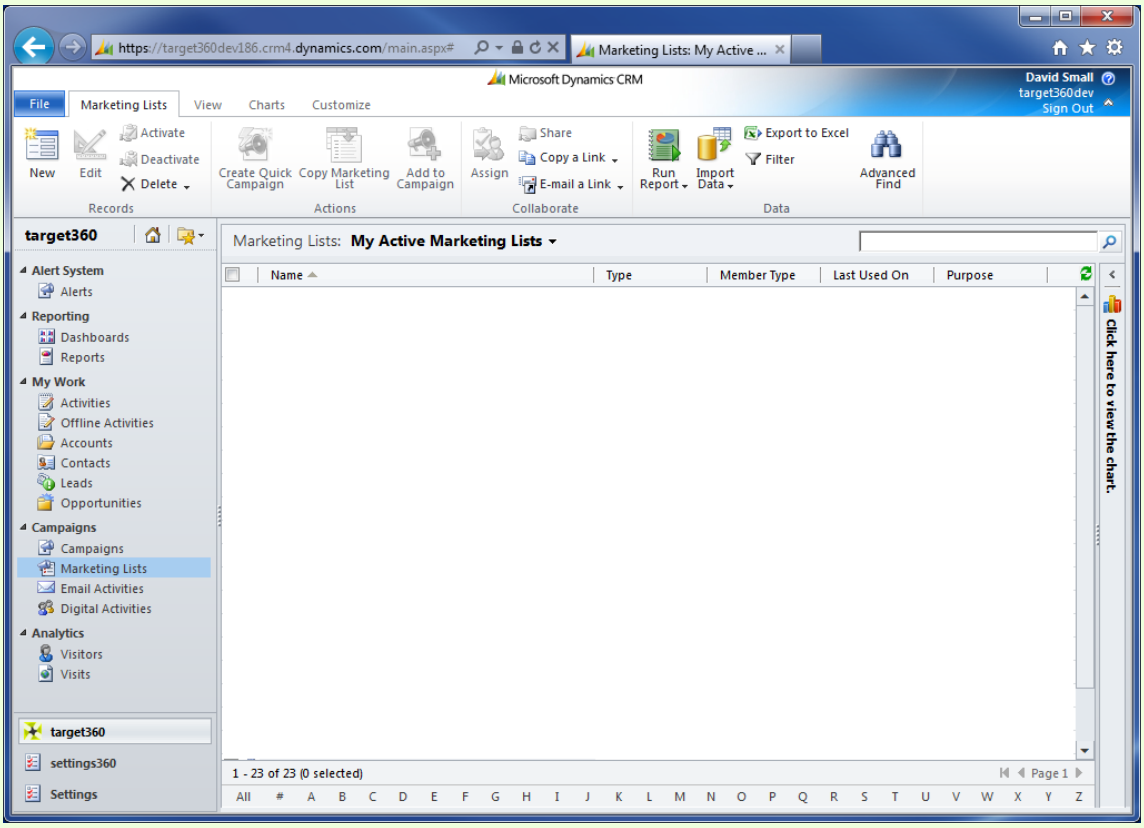
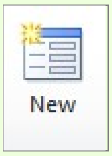


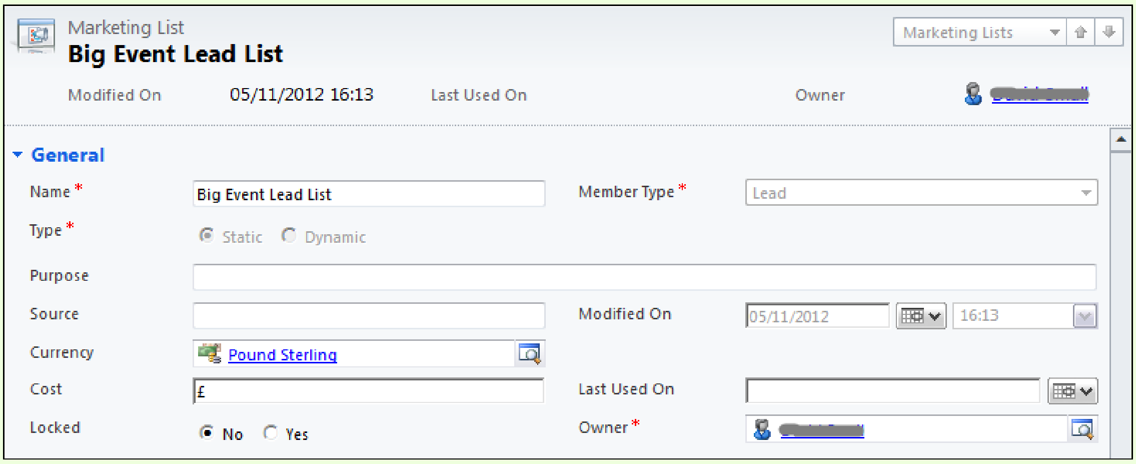
Figure 33 - The Marketing List Grid

Click on the 'New' button on the Ribbon:



target360

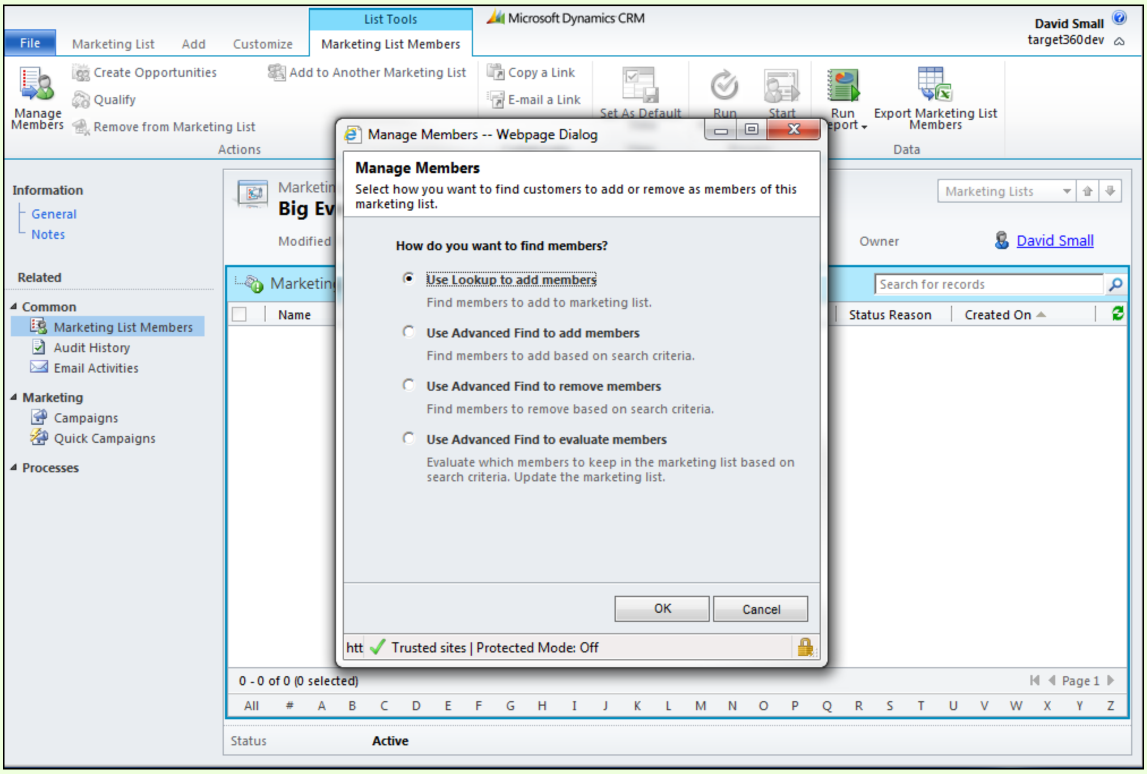
Enter the new Marketing List's details:



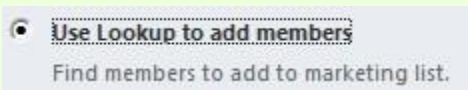
We have chosen a Member Type of Lead and a Marketing List Type of Static.

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

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



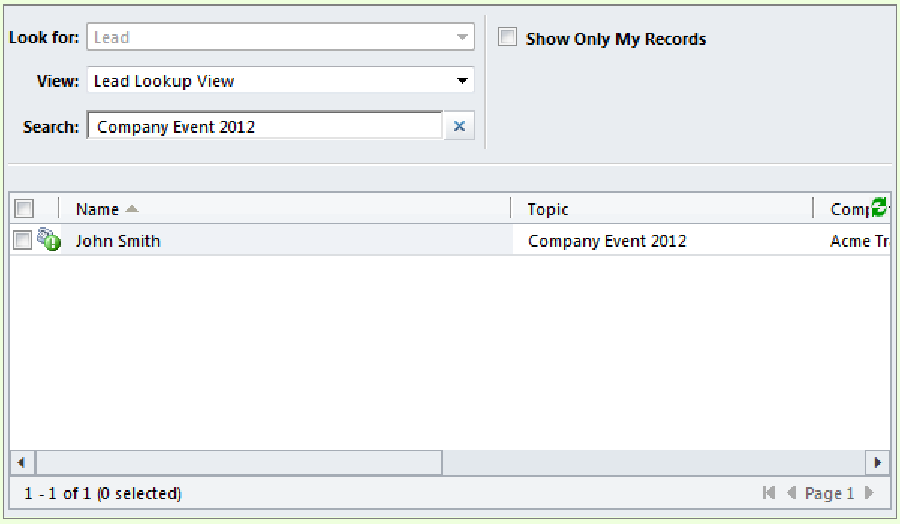
Select 'Use Lookup to add members' and select 'Next'.



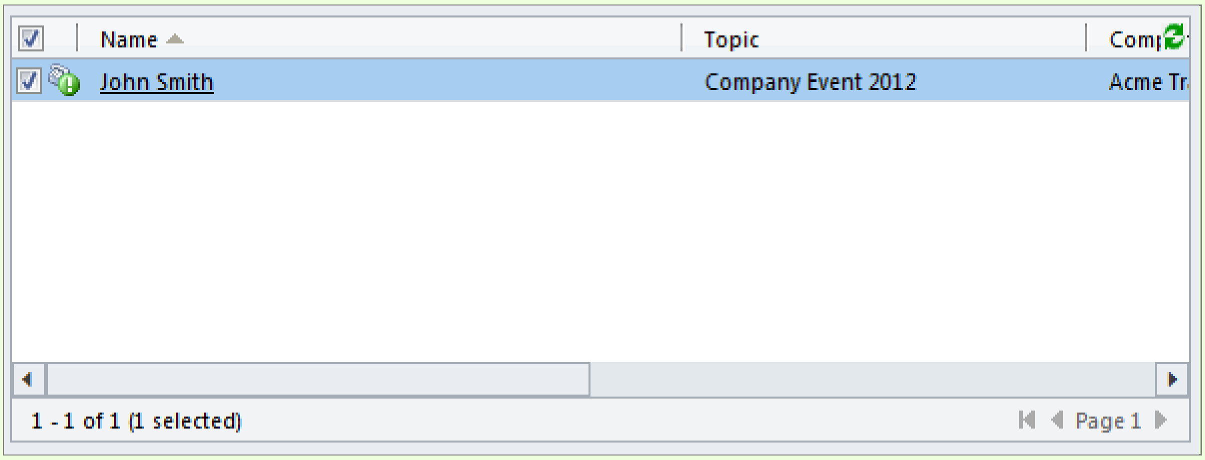
target360

A popup will appear with a search box. Enter what you wish to search on, for example: company name, city, region etc. In this case the search was carried out on Topic.

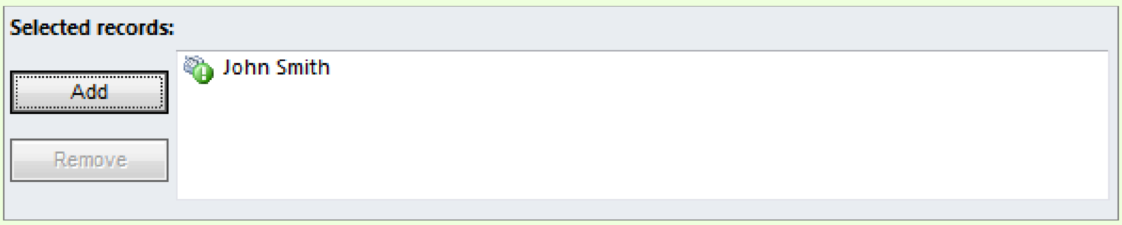
Enter what you wish to search for then click on the magnifying glass.



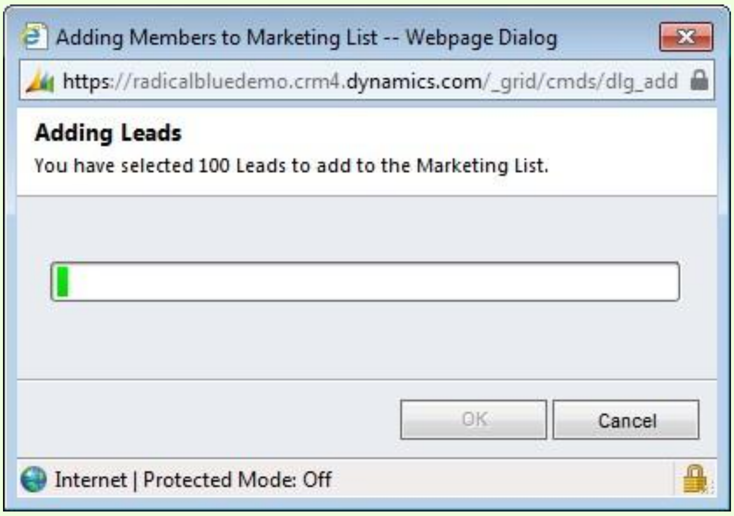
target360 will return all results that contain the information you have searched for. You can then highlight each of the leads individually or select them all.



Click Add and all the records will now appear in the box next to 'Add'.



Click New. The marketing list will now be created.



Click on the ‘Save’ or ‘Save & Close’ button on the Ribbon to commit the record to ***target360***.

You can find the record by entering ‘Big Event Lead List” into the Quick Search box.

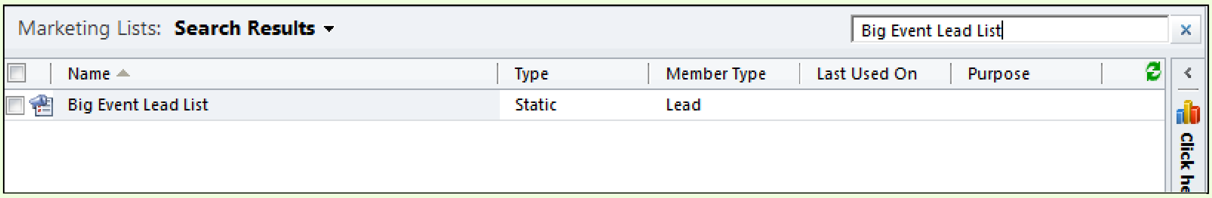


Figure 34 - Using Quick Search

This concludes the walkthrough.

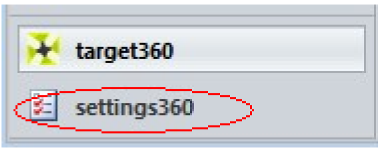
2.4 Email Configuration

2.4.1 Email Config Creation

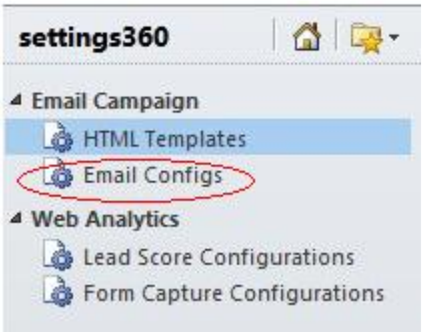
The email configuration file tells ***target360*** how to configure each email that is sent from an Email Campaign. For example, it is here that you configure the "From" email information since marketing emails are generally sent from a department or organisation alias.

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.



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

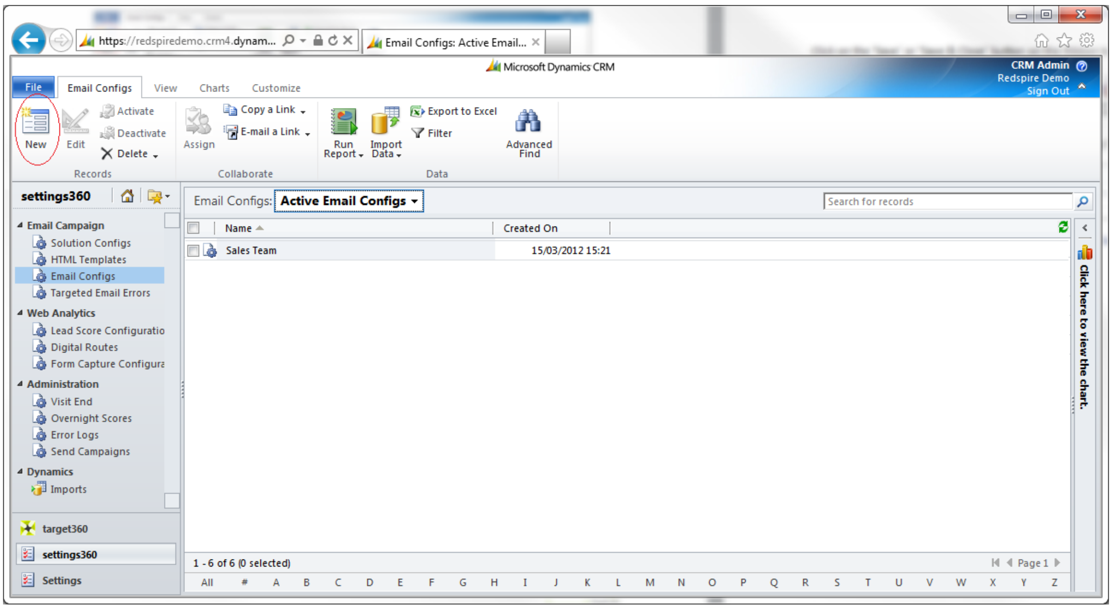


Figure 35 - The Email Config Grid

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

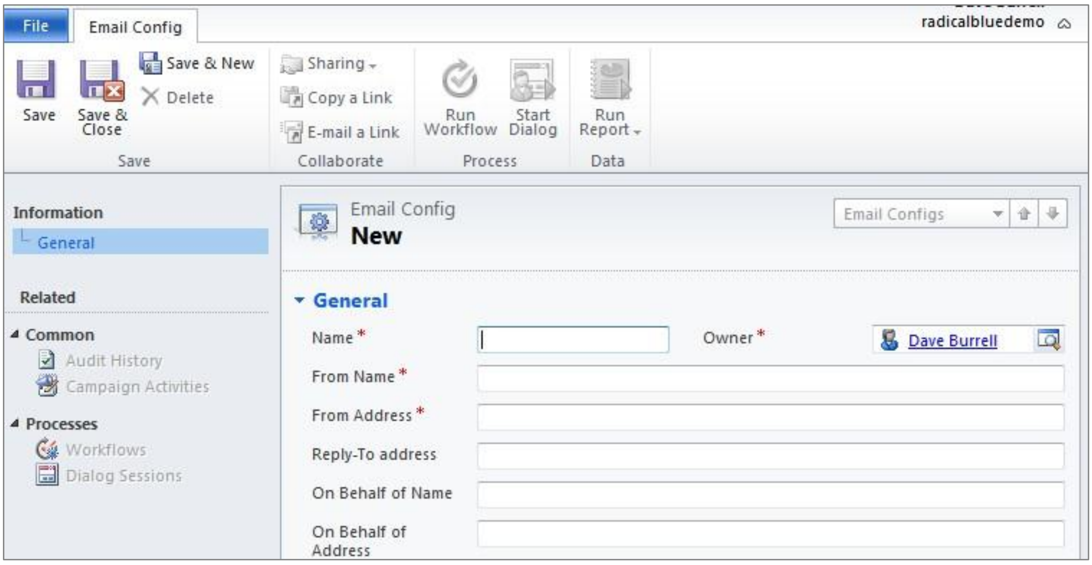
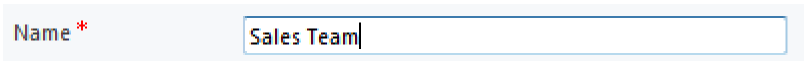
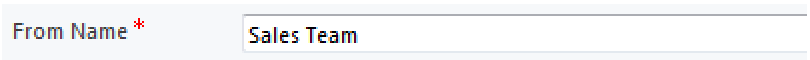


Figure 36 - Email Config Form

Name	The Name field serves no functional purpose other than allowing you to easily identify what / who each email configuration is for. 
From Name	This is the name that appears to the recipient of a marketing email. This can be set as a company name or an individual's name. 
From Address	The email address you wish to appear as the source of the email. This must be an actual address owned by your company. 

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

Reply-To Address	If 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 Address	If you wish the email name or address to appear as if it is sent on behalf of somebody else.

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.

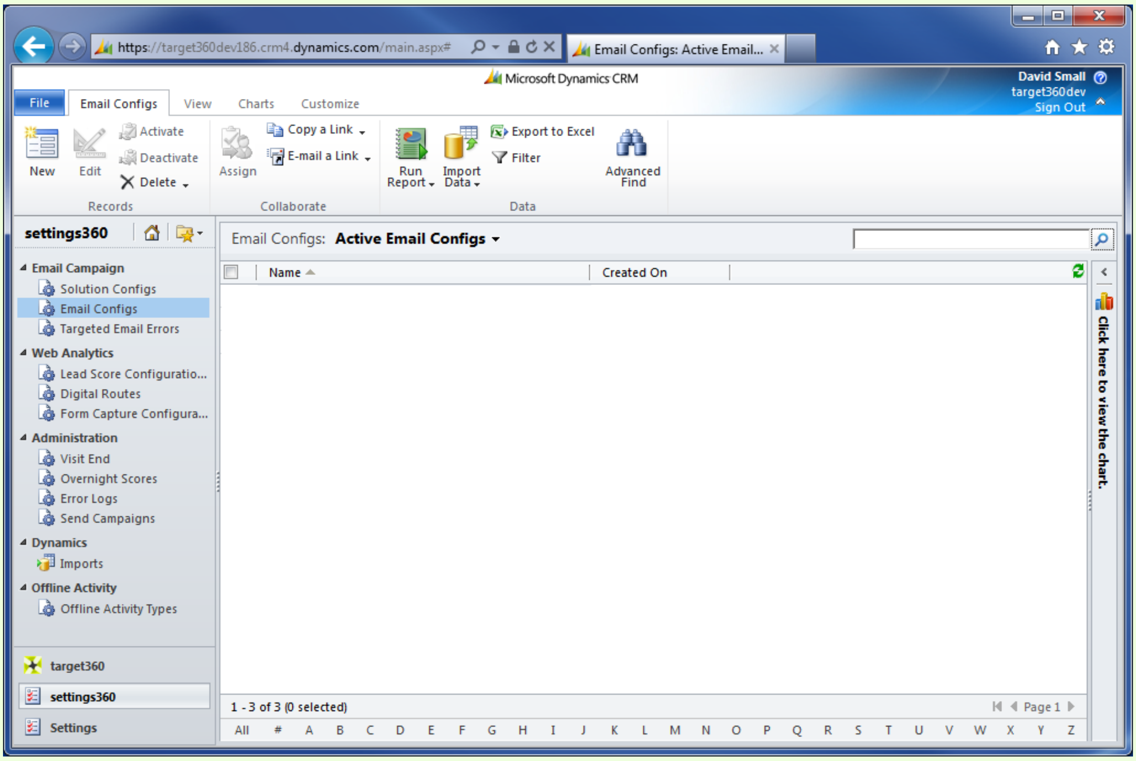


Figure 37 - The Email Config Grid

2. Click on the 'New' button on the Ribbon:

3. Enter the mandatory Email Config record details:

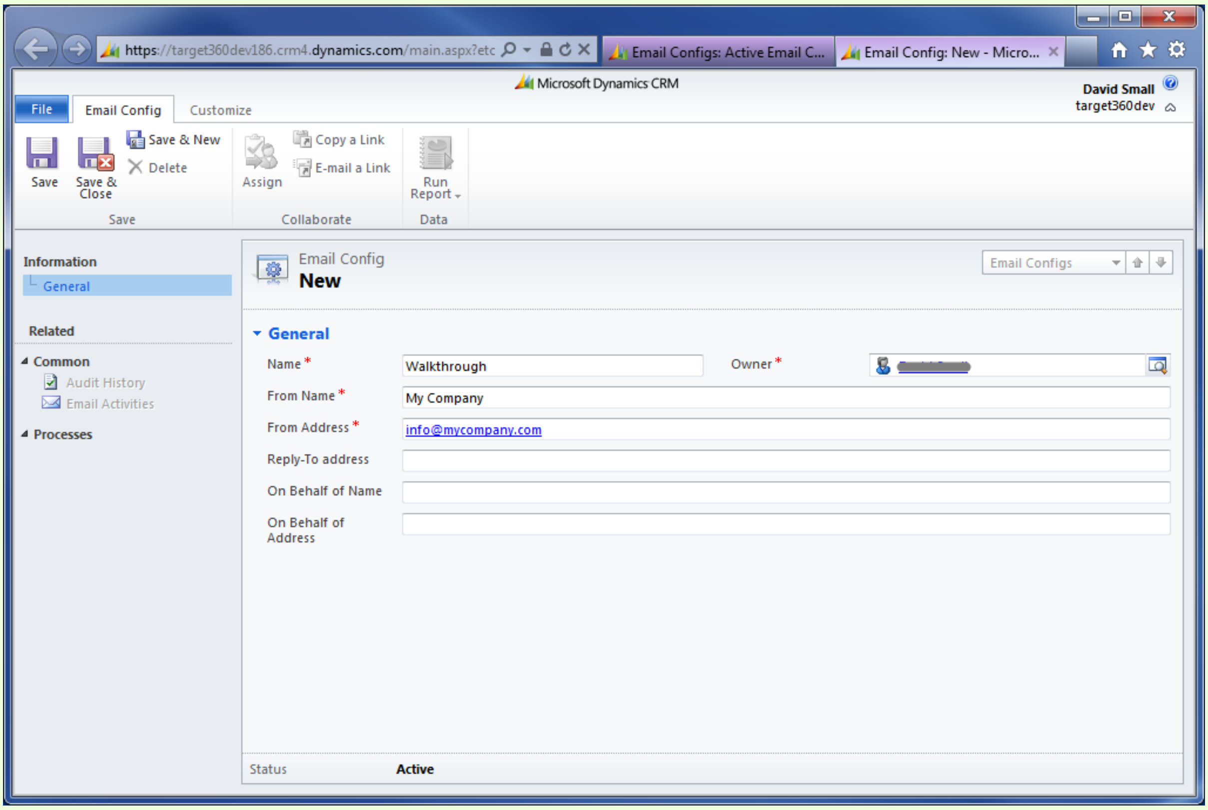


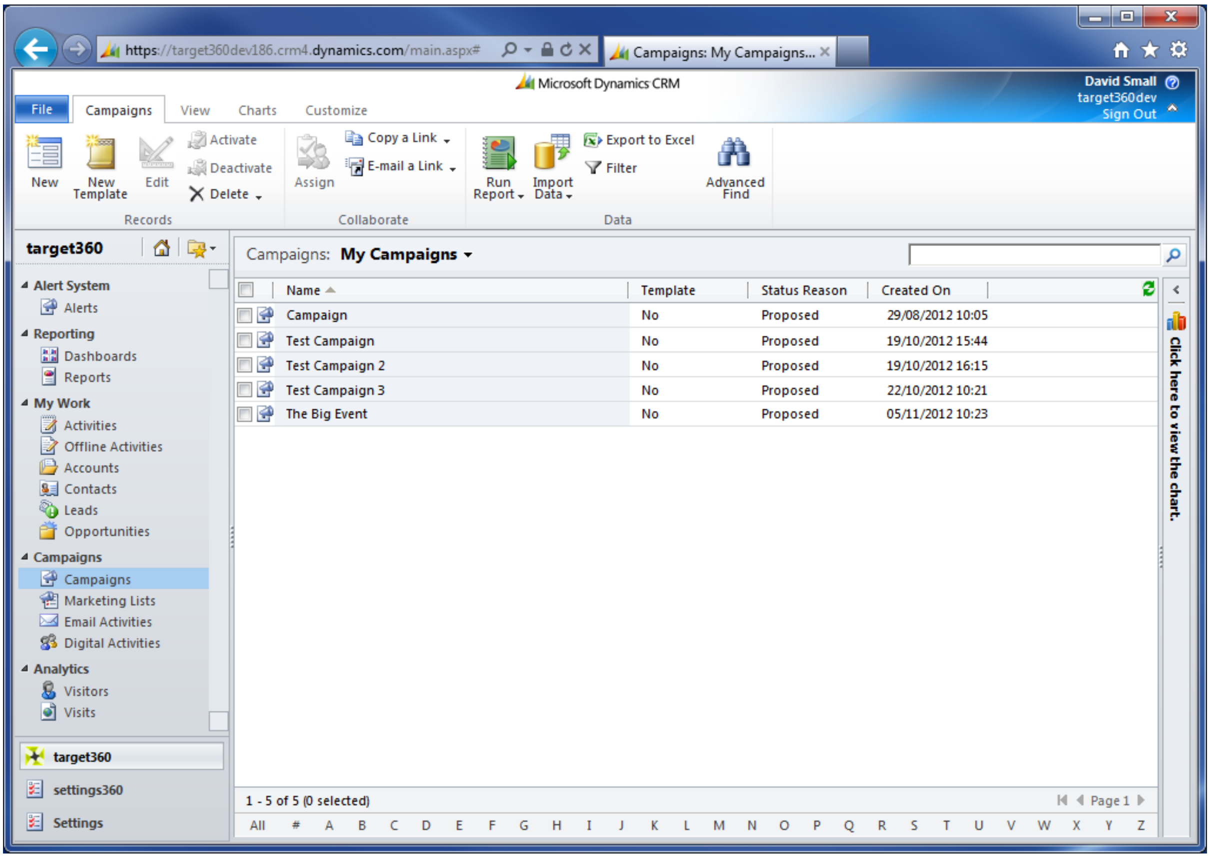
Figure 38 - Email Config Form

4. Click on the ‘Save’ or ‘Save & Close’ button on the Ribbon to add the record to ***target360***.

This concludes the walkthrough.

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.



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.

Note
The Proposed Begin Date and the Proposed End Date are used by reporting and do not have an effect on the functionality of the Campaign or its Activities. It is up to your organisation how you implement these dates but generally speaking you would wish to encompass the full time frame of the campaign lifecycle.

Below is an example of the Campaign form.

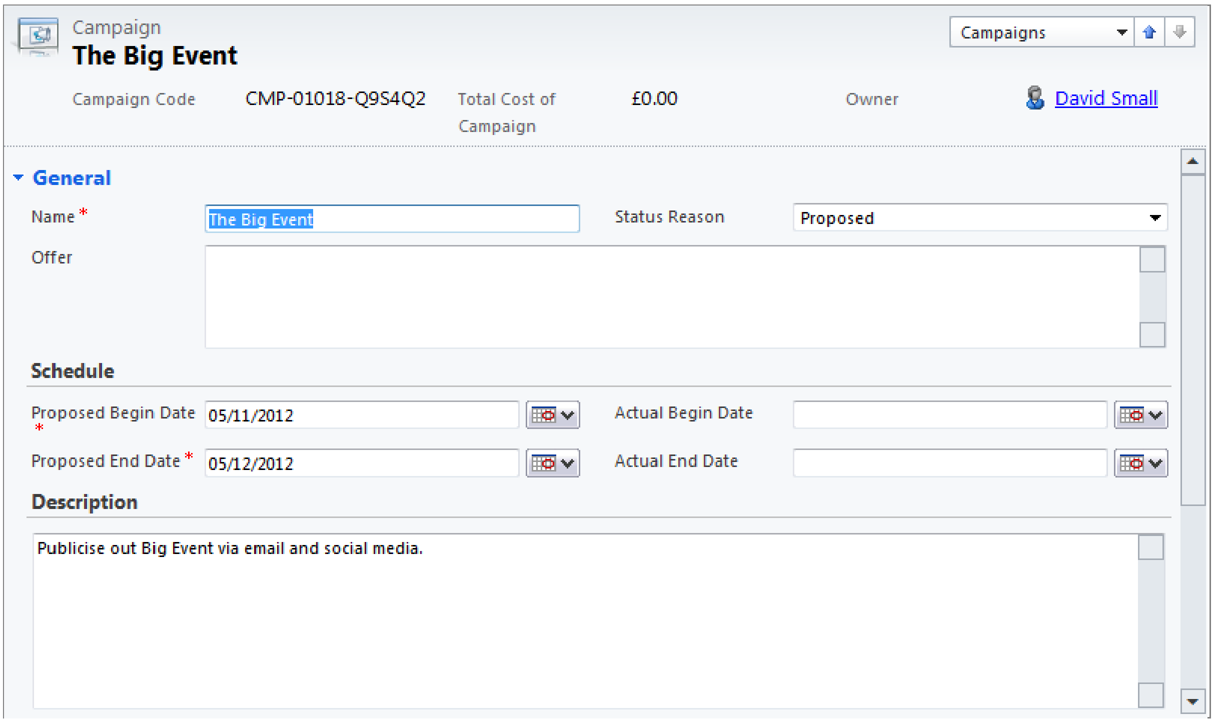


Figure 39 - The Campaign Form

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.

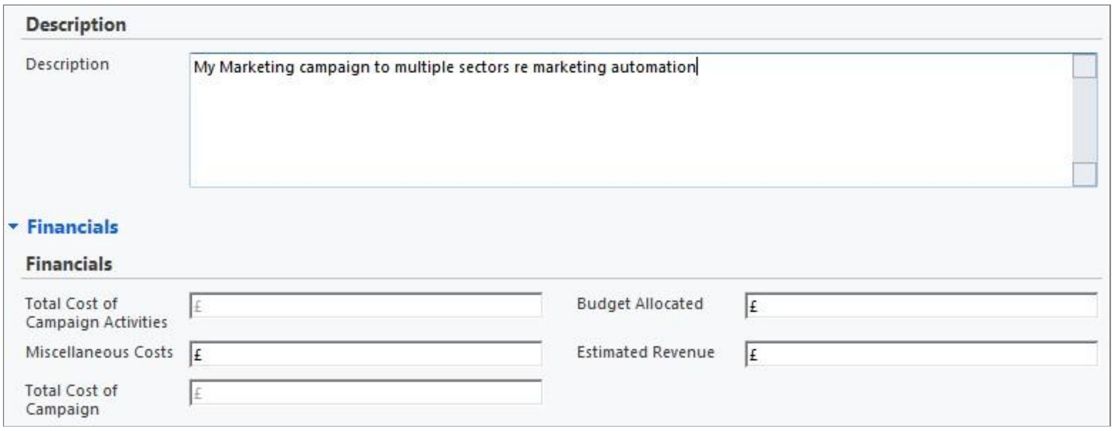


Figure 40 - New Campaign Form (bottom)

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.

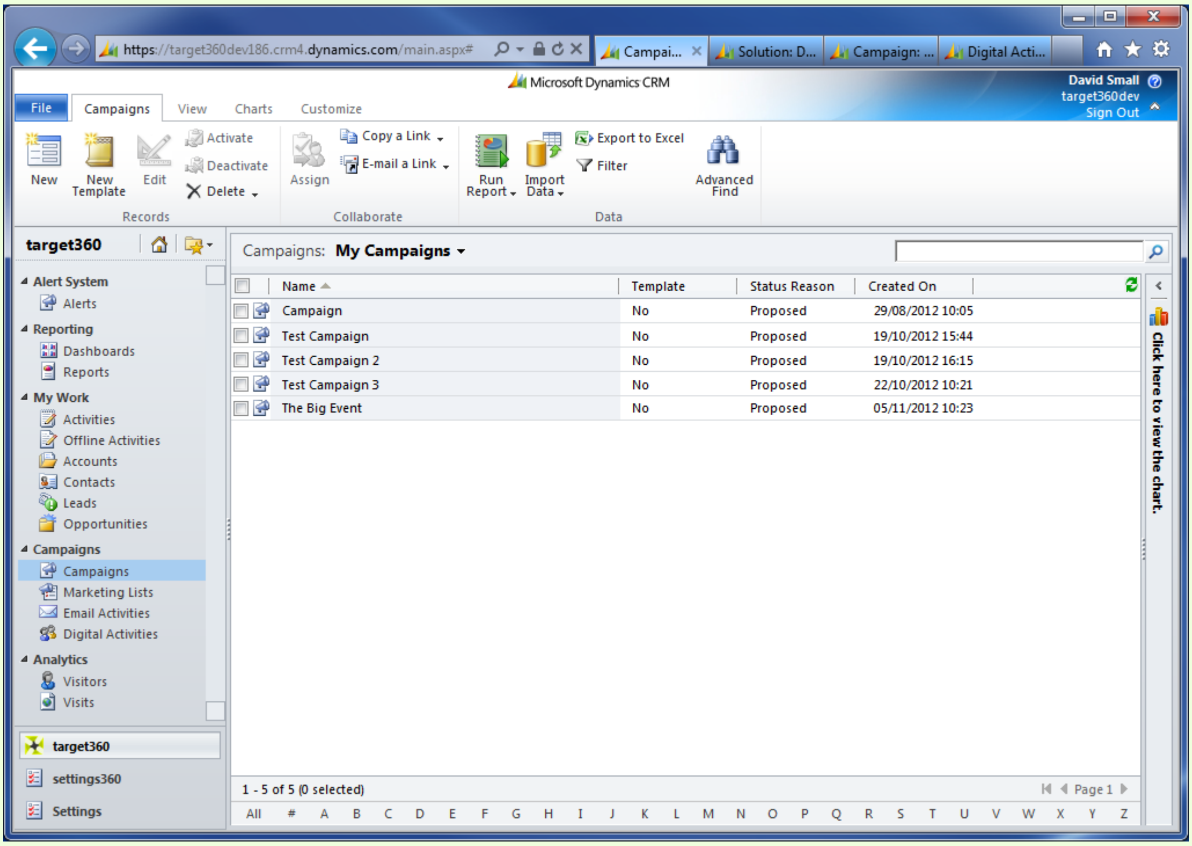


Figure 41 - The Campaign Grid

2. Click on the 'New' button on the Ribbon:

3. Enter the new Campaign's details:

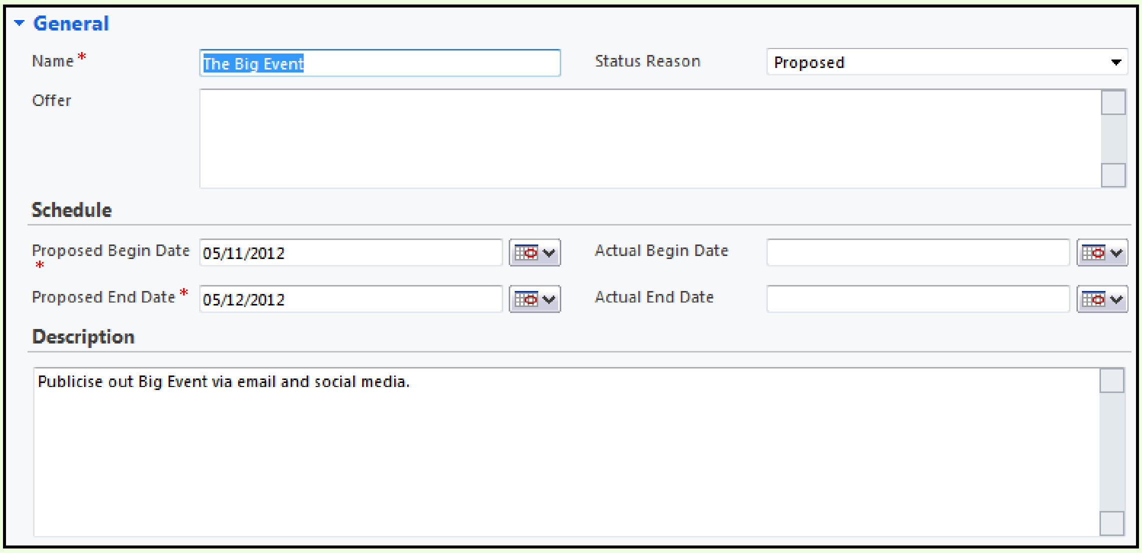


Figure 42 - Lead Details

4. You can also enter the budget and target for the Campaign.

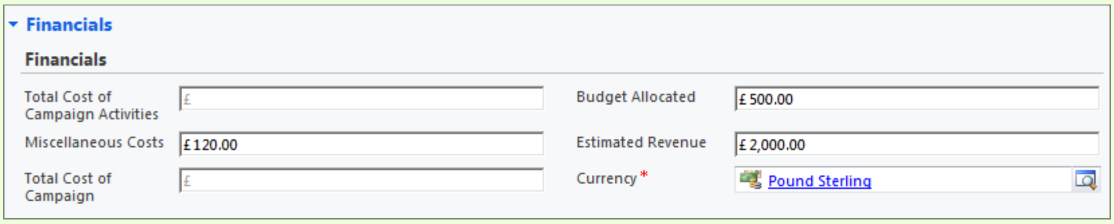


Figure 43 - Lead Financials

5. Click on the 'Save' or 'Save & Close' button on the Ribbon to add the record to ***target360***.

NOTE: You can find the record by entering 'The Big Event' into the Quick Search box.

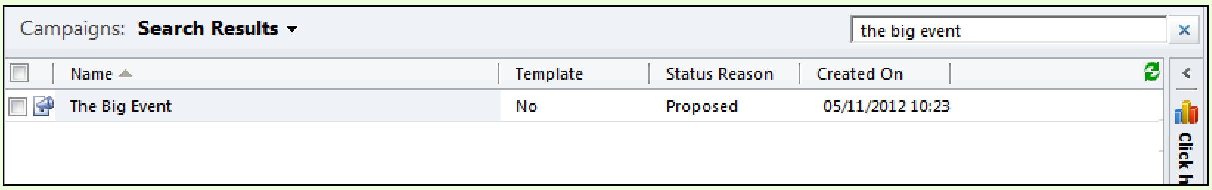


Figure 44 - Using Quick Search

This concludes the walkthrough. You can keep the Campaign record for use in later Walkthroughs if you wish. The next step would be to create a Campaign Activity.

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.

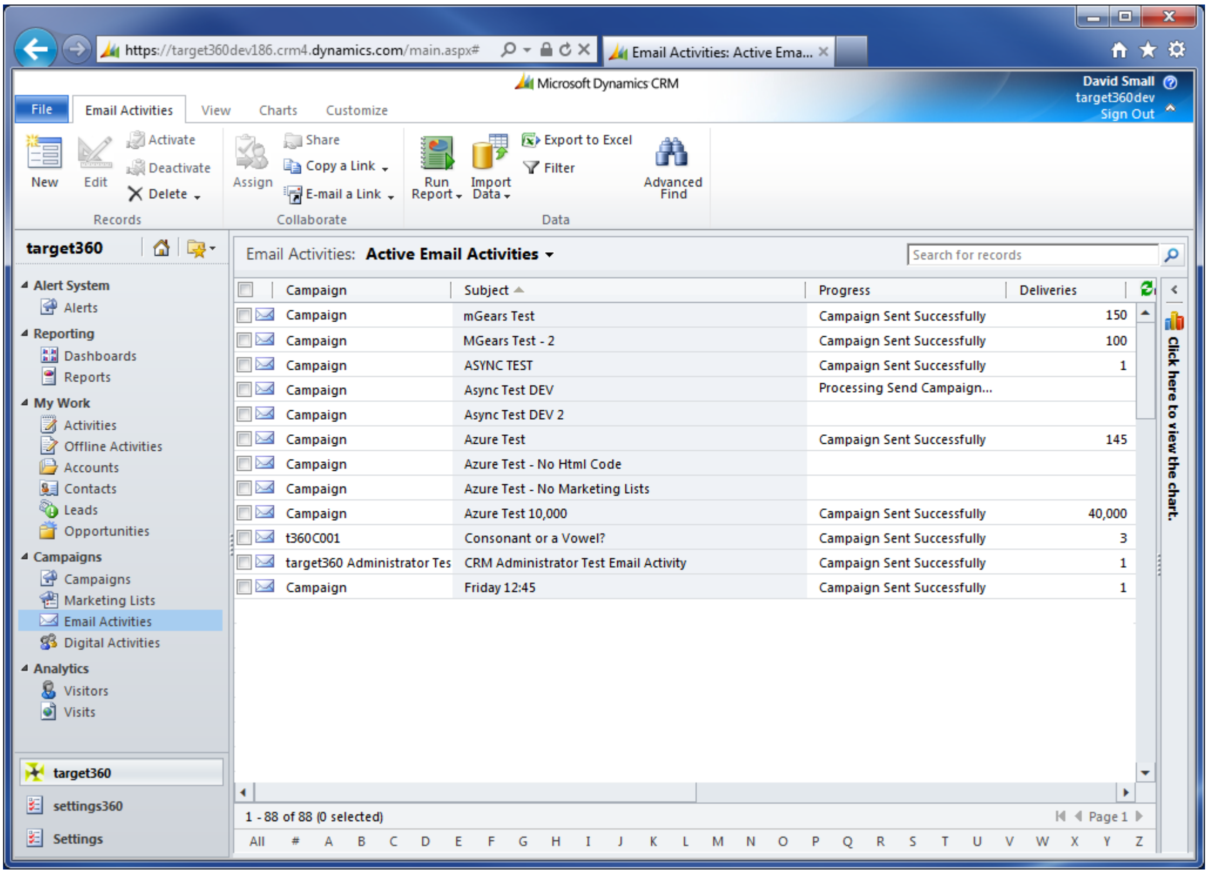


Figure 45 – The Email Activities Grid on the main navigation menu

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.

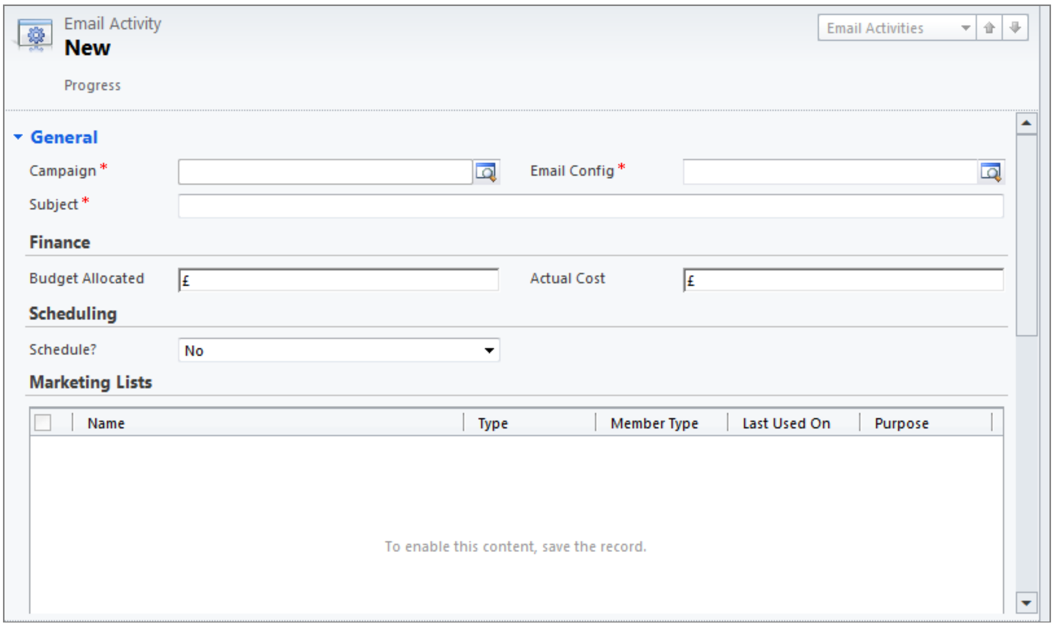
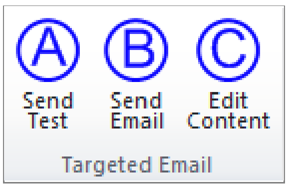


Figure 46 - The Email Activity Form

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 this walkthrough we will create an Email Activity for a fictional event.

1. To create an Email Activity you should navigate to the 'Campaigns' section of ***target360*** on the Application navigation pane. Open the Campaign you created in the previous Walkthrough (or any test Campaign you have to hand).

   Click on Email Activities in the navigation menu of the Campaign form.

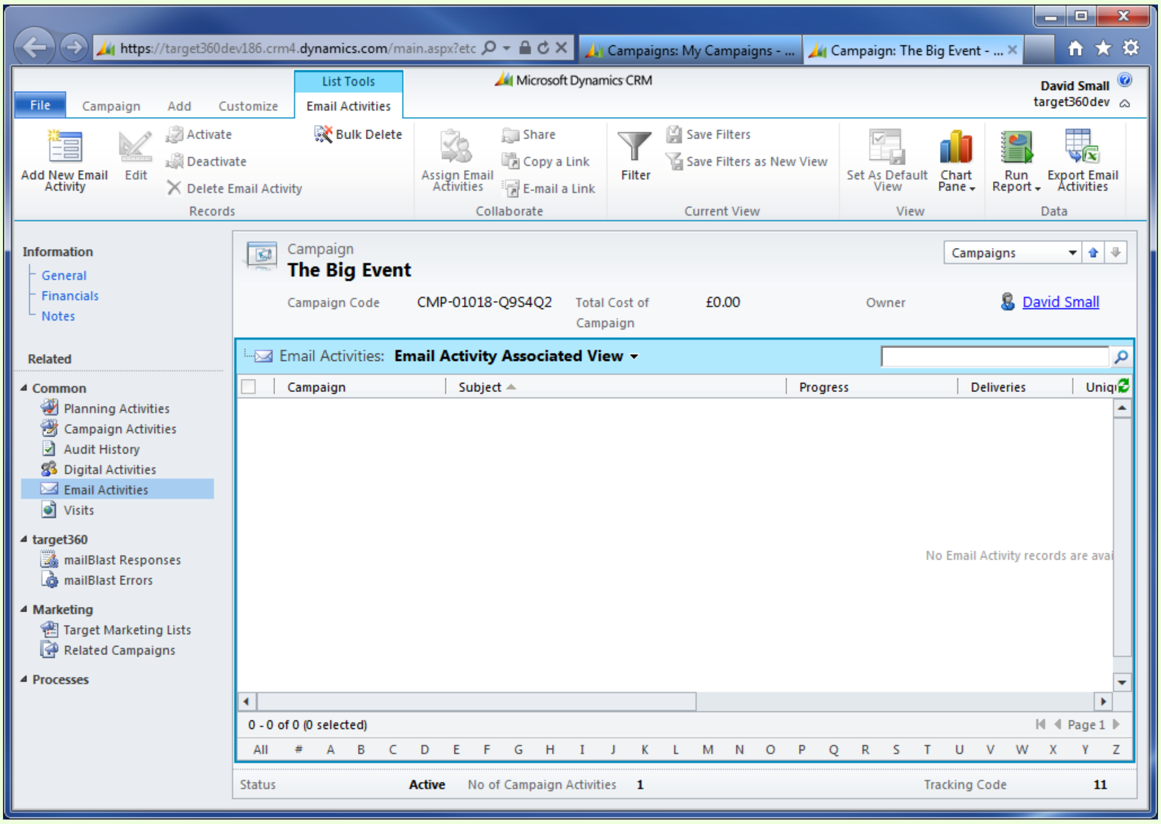
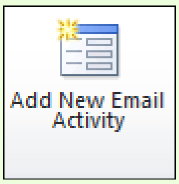


Figure 47 - Managing Email Activities from within a Campaign

2. Click on the 'Add New Email Activity' button on the Ribbon:



3. Enter the mandatory Email Activity details:

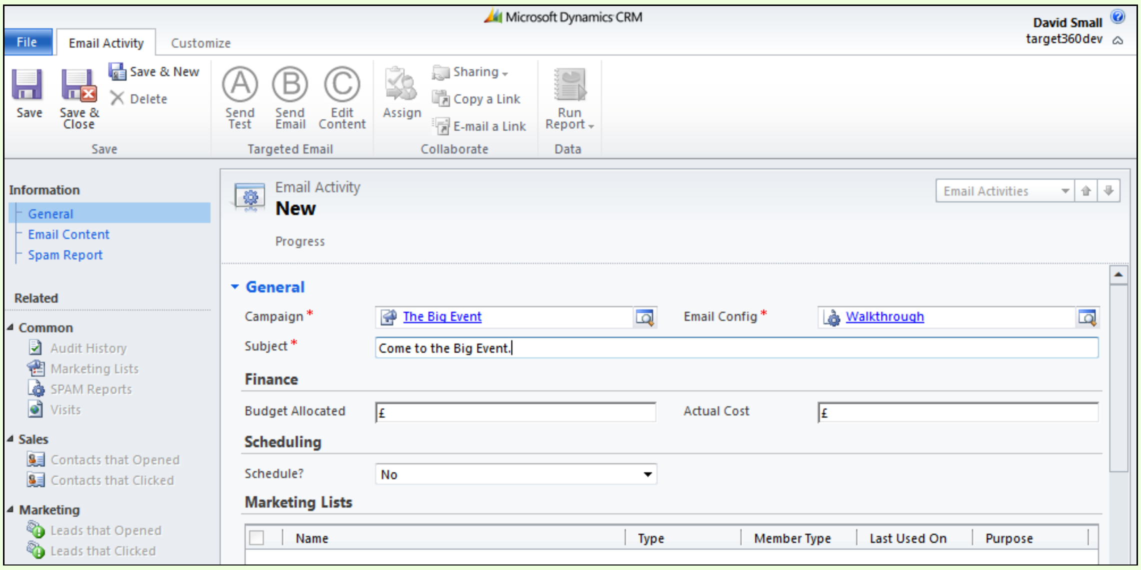
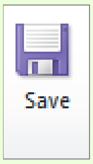


Figure 48 - The Campaign Activity Form

Create a new Email Config record if there is not a suitable one already present. In this case we have used an Email Config record that we created in an earlier walkthrough.

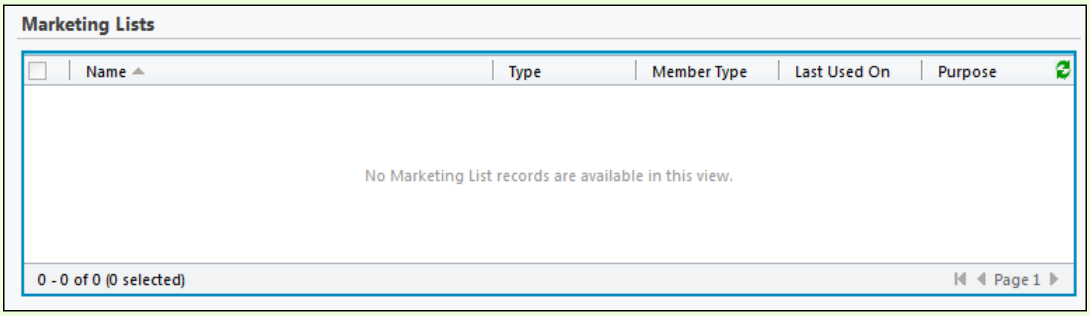
4. Click 'Save' to save the record.

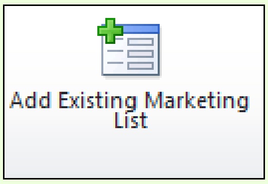


NOTE: Once you have saved the record, you will be able to configure the Marketing List(s) and Email Content.

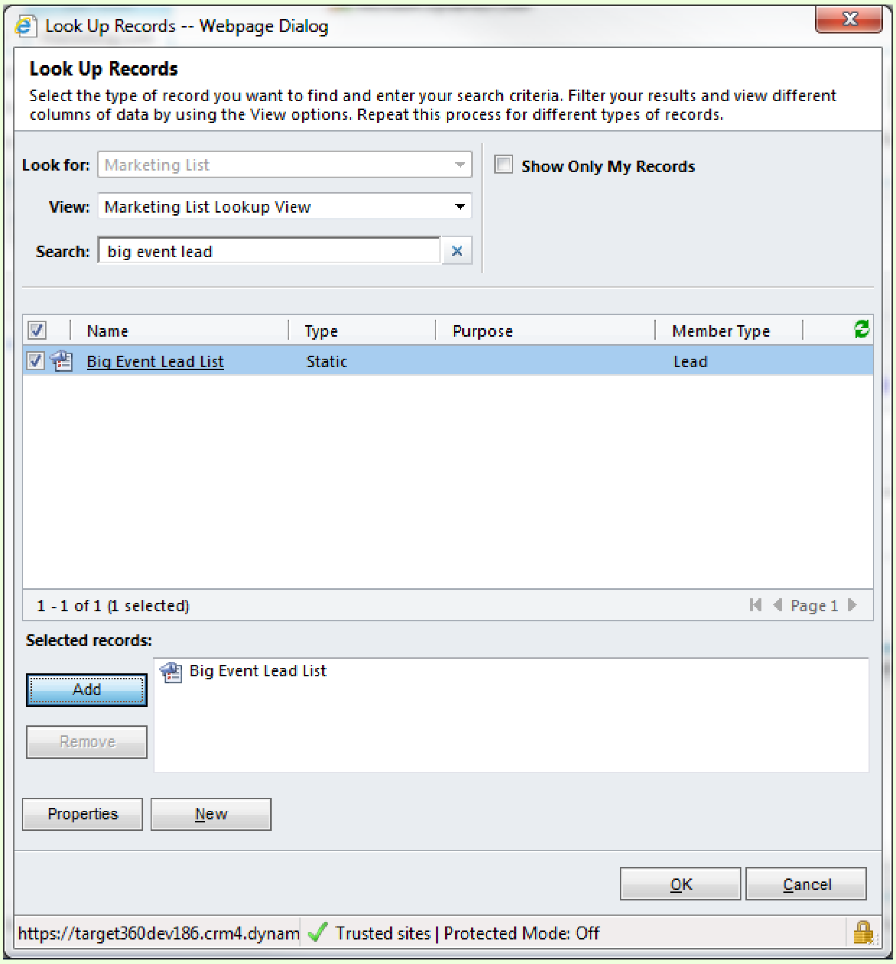
You must always save the record in order to progress to these sections of the Email Activity.

5. Add a Marketing List by clicking on the Marketing Lists Grid and clicking on the "Add Existing Marketing List" button in the ribbon.





6. Search for an existing Marketing List or create a New Marketing List. In this case we have used the "Big Event Lead List" as created in an earlier walkthrough.

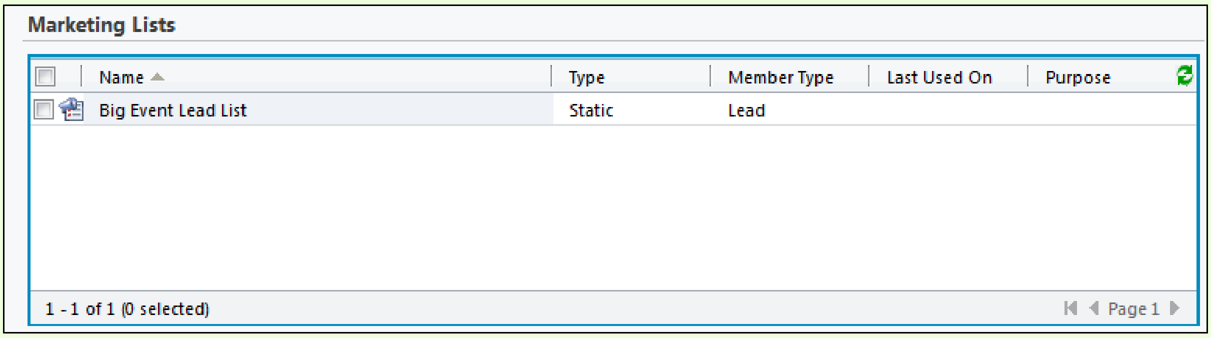


Notice that we were able to search for the list item by name and that we then click on the "Add" button to include the list in the "Selected Records" section.

target360

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.



7. Click on the “Edit Content” button in the Ribbon.

8. You will now be presented with a pop-up browser window containing an HTML Editor. Here we can compile out email template.

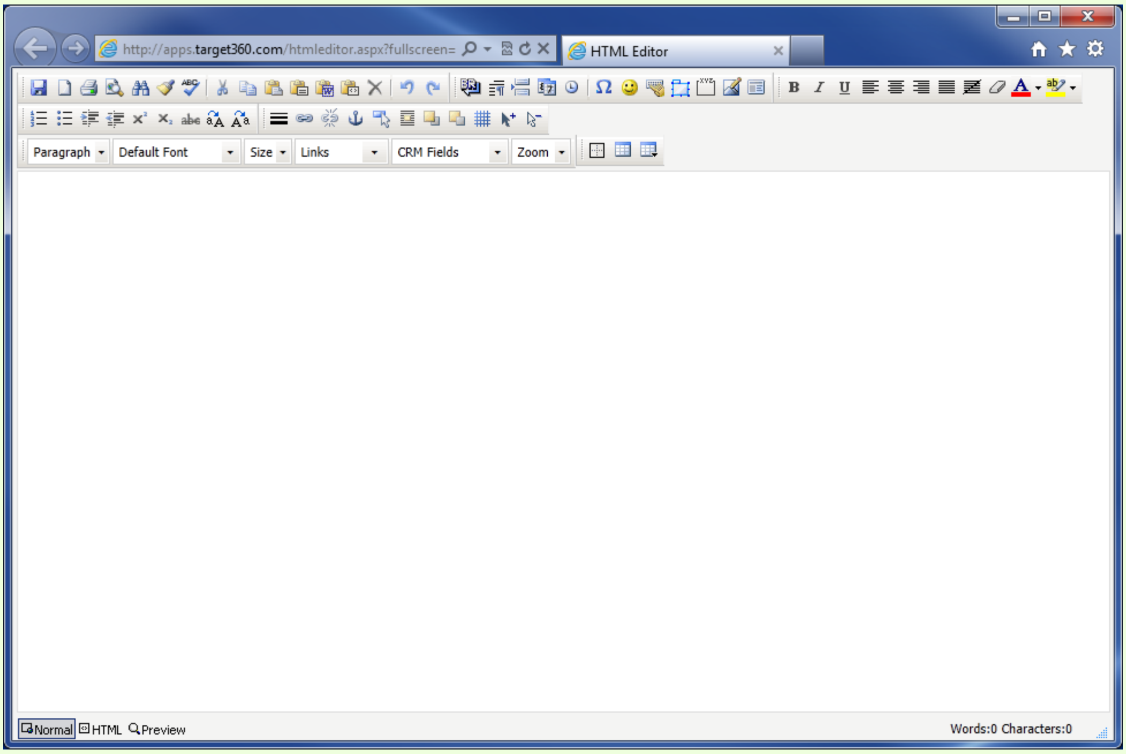
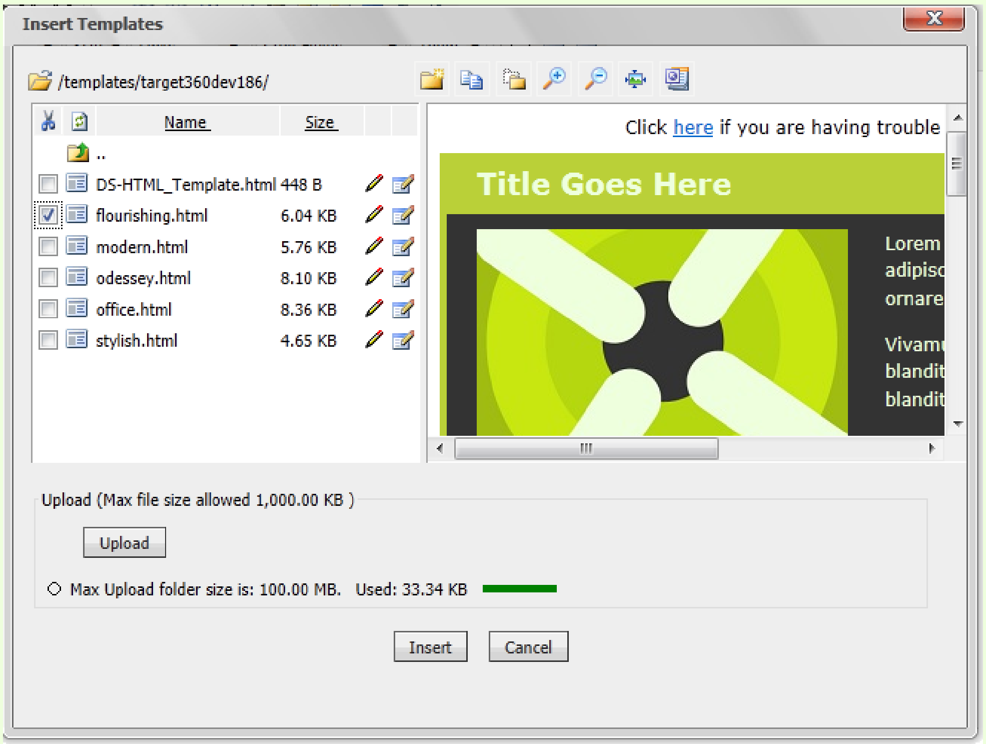


Figure 49 - The HTML Editor

9. Click on the “Insert Templates” button to add a pre-built email template.

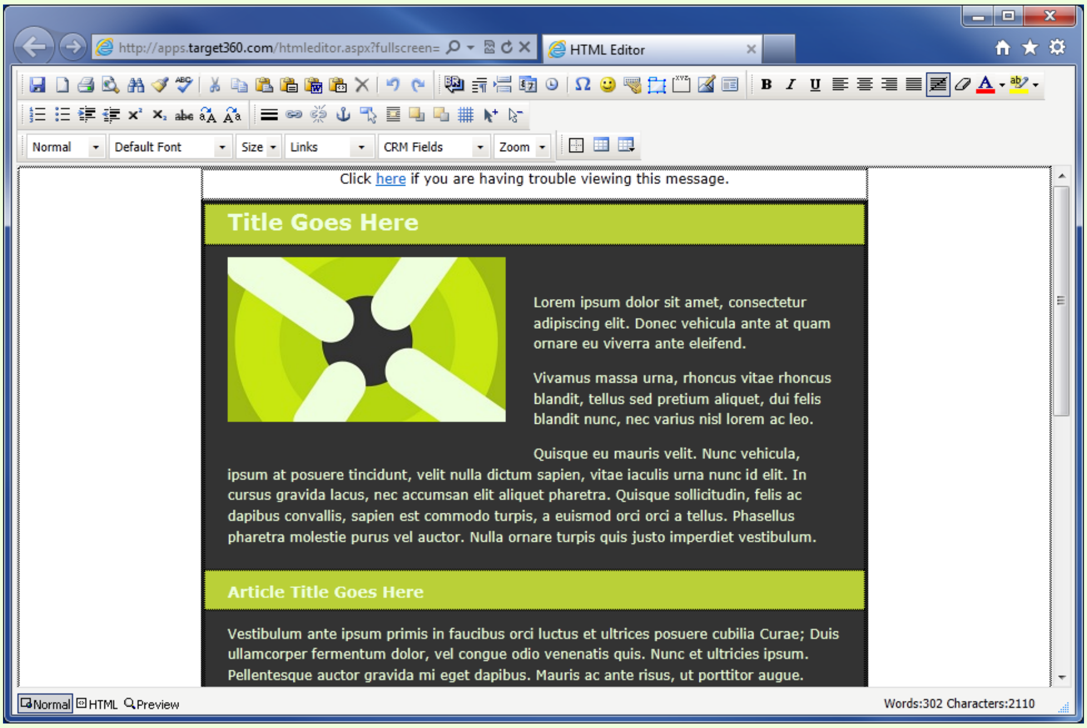
10. The Insert Templates dialog will open.



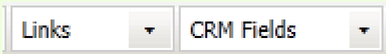
On this screen you can select a pre-existing email template, upload an email template of your own devising or modify an existing email template to closer match your needs.

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

11. Inspect and modify the email content.



You can add standard "Links" such as Unsubscribe and add CRM Fields such as "First Name" and "Last Name".



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.

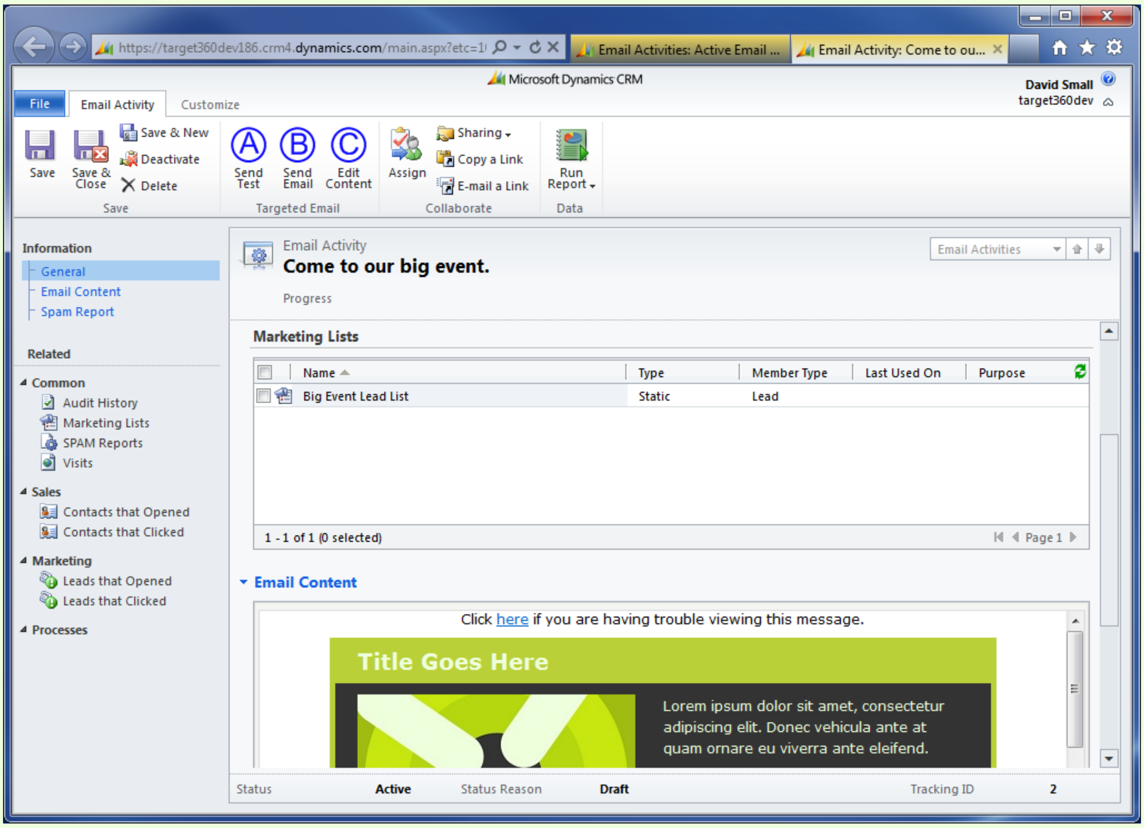
You can return to modify the email at any time prior to sending the email activity.

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

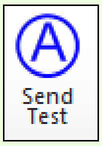
Click Here to Edit again

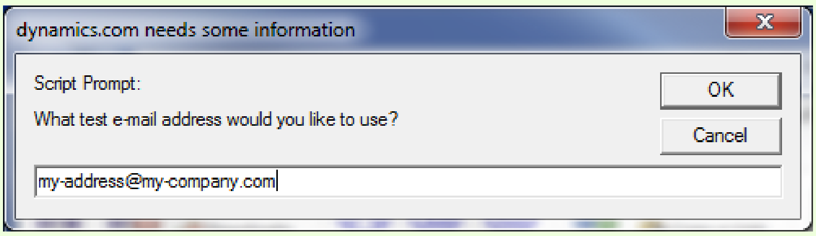
14. The Email Activity will update to show the new email template.

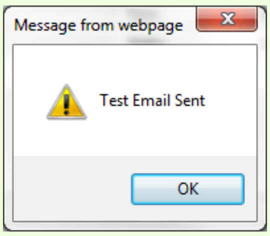


NOTE: Some browser settings can prevent the Email Content window from updating to reflect the changes that have been made. You can refresh or re-open the Email Activity if this is the case.

15. Click the “Send Test” button in the Ribbon and supply your Email Address.

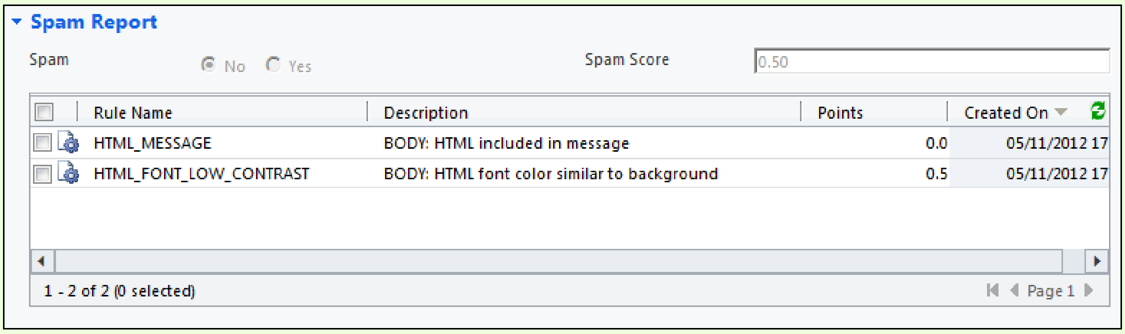




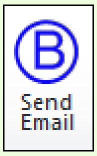


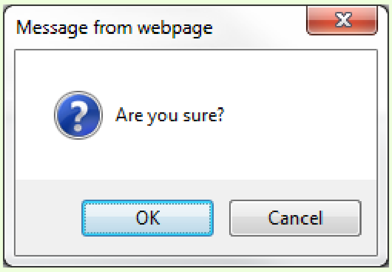
You should receive a copy of your email after 5 or so minutes.

16. Once the email has been received, re-load the Email Activity (either refresh or close and re-open the form). Scroll down and open the “Spam Report” section to review the spam analysis of your email.



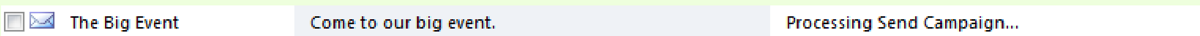
17. Once you are happy with your test email and your spam score, you are ready to send your email to the Marketing List. Click the “Send Email” button on the Ribbon.



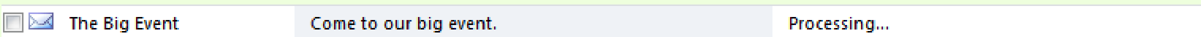


If you click OK, the email will be sent and the Email Activity will close.

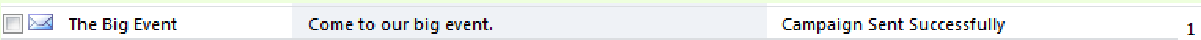
18. The Progress of the record will be set to “Processing Send Campaign…”



19. The Progress will change to “Processing…” once the system posts the email activity record to the back end services.



20. Finally the record will be set to “Campaign Sent Successfully” which means your Marketing List will now be receiving your email. Over the next few minutes you will see delivery statistics start to come in.

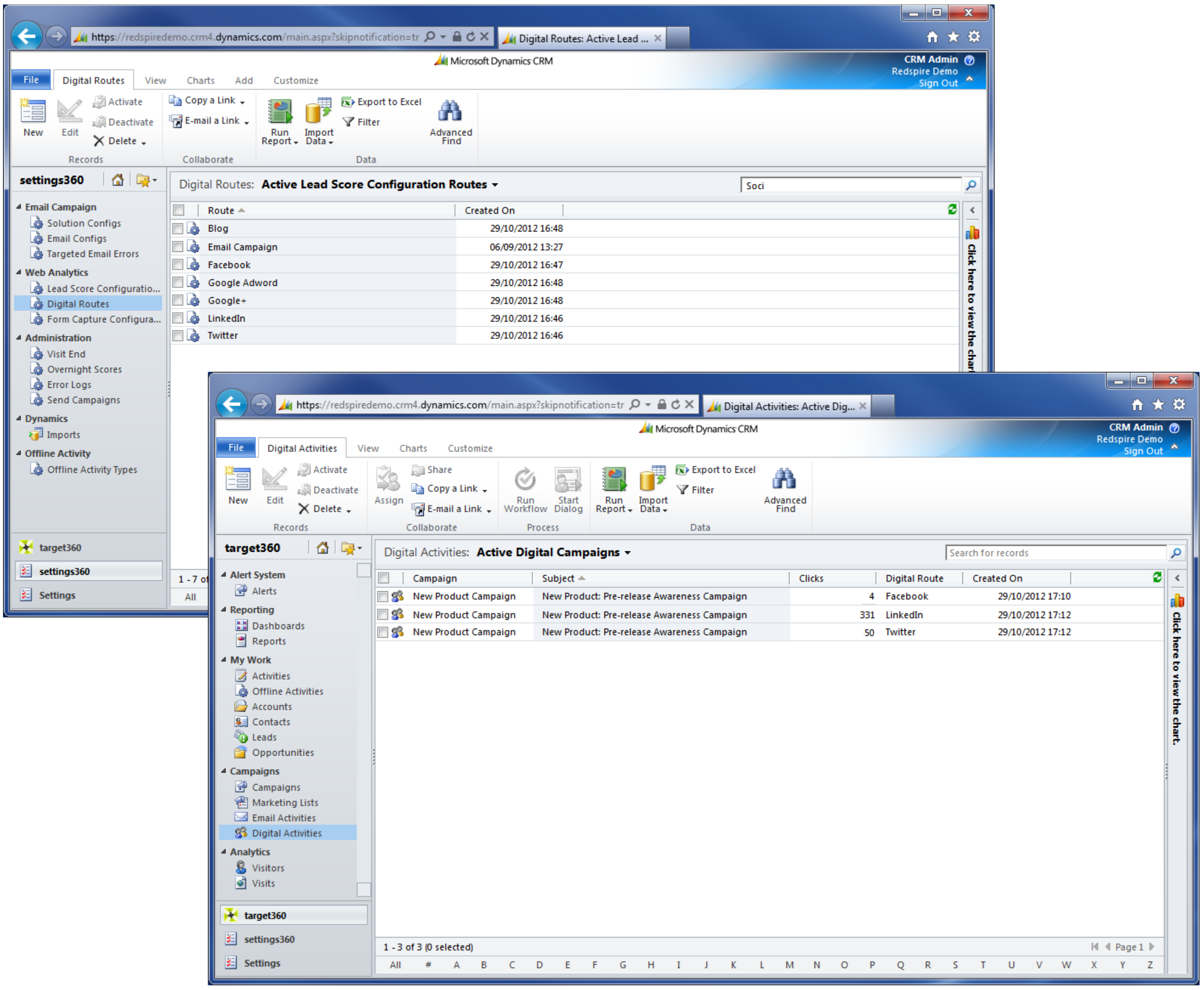


When you execute an email campaign, this code will automatically be added to your outgoing emails so that you can track user clicks and subsequent behaviour. You can also copy and paste this onto links in Twitter or Facebook for example.

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.

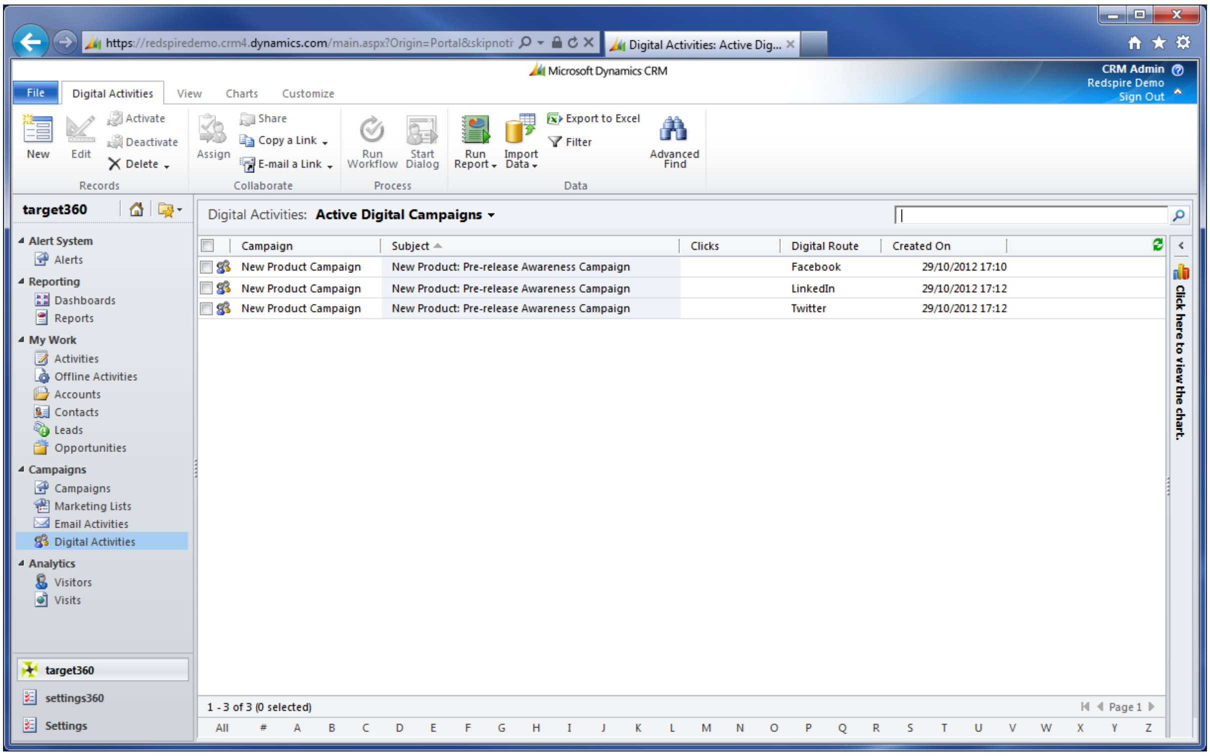


Figure 50 - The Digital Activities Grid

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.

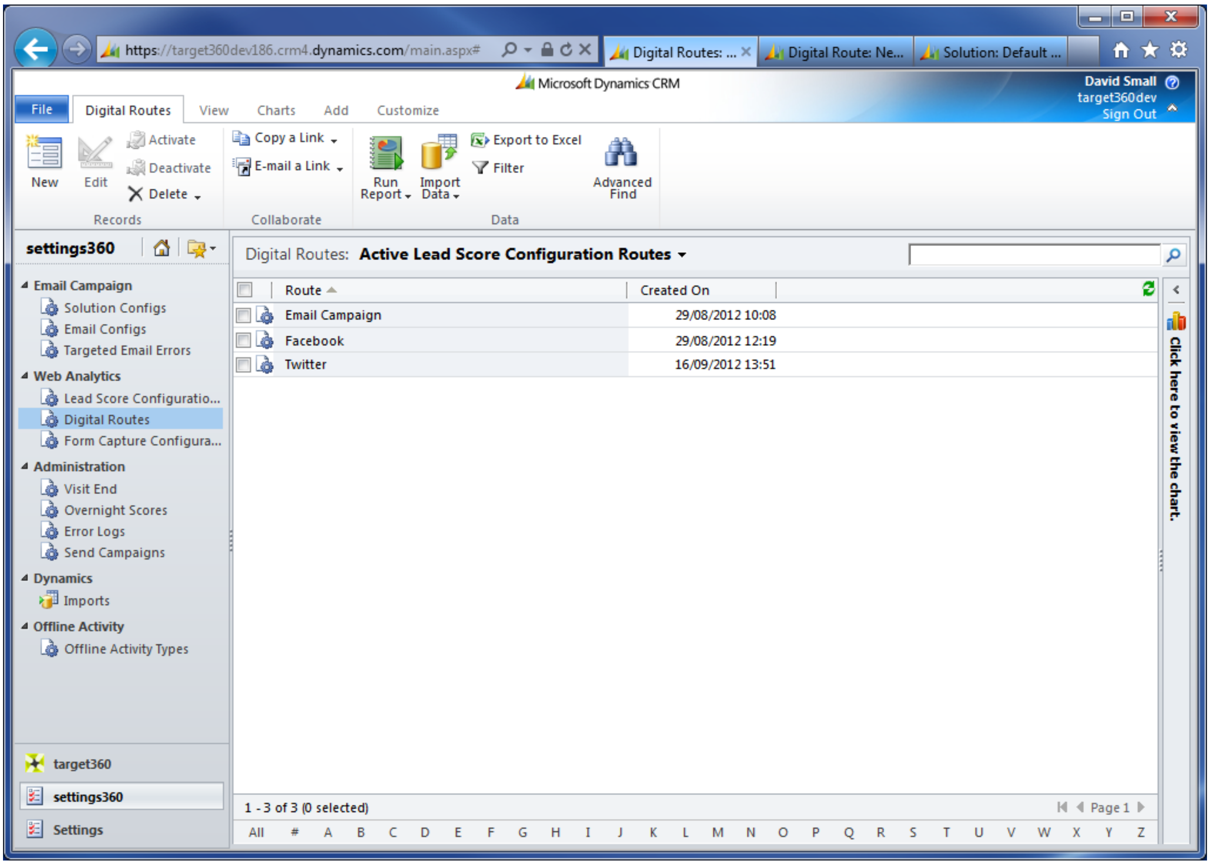


Figure 51 - The Digital Routes Grid

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.

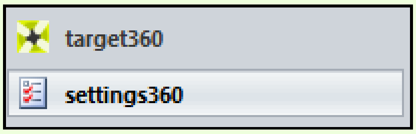


Figure 52 - Navigation Groups

2. Click on 'Digital Routes" in the Navigation Menu.

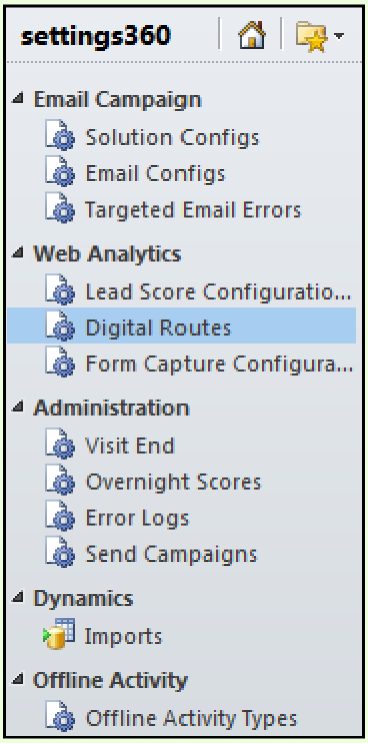
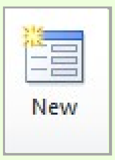


Figure 53 - Navigation Menu

3. Click on the 'New' button on the Ribbon:



4. Enter the name of the new Digital Route.

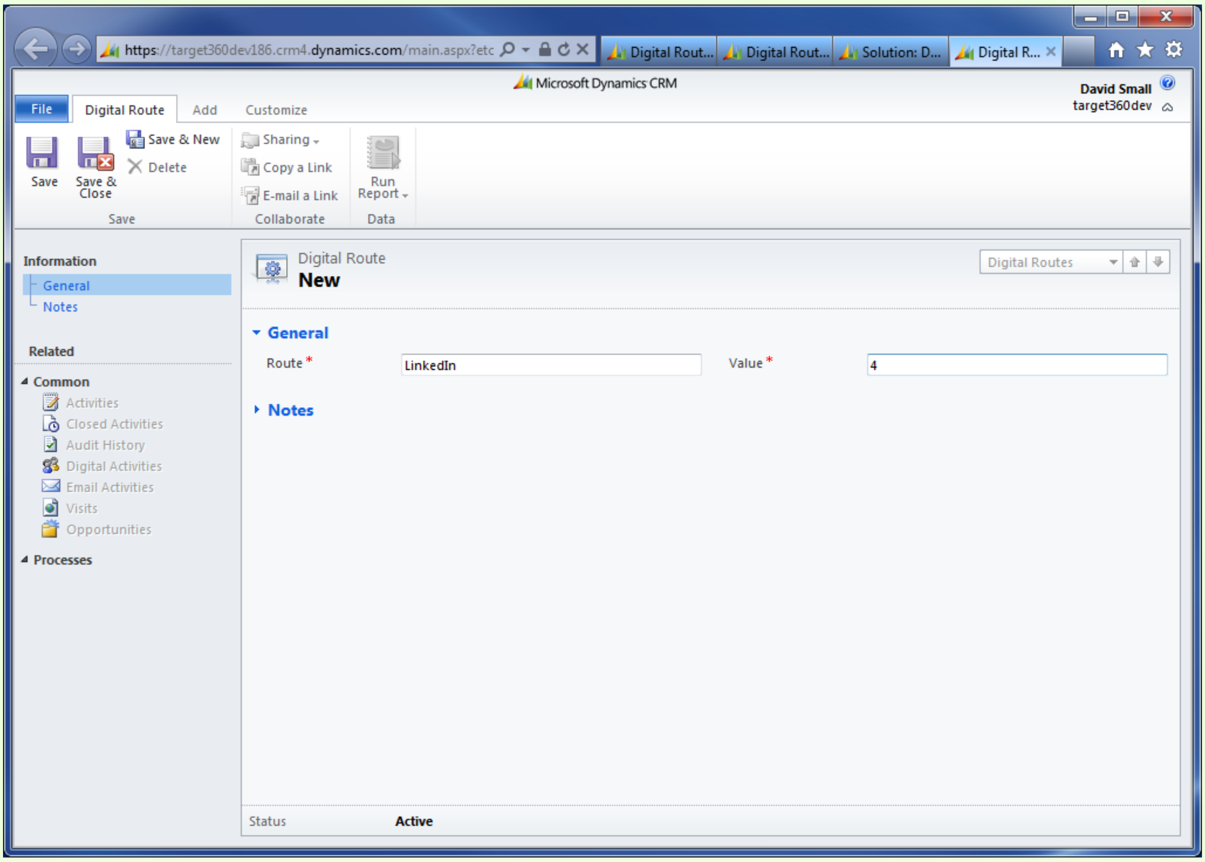


Figure 54 - The Digital Route Form

The value should be an integer and it should be distinct from the values entered into the other digital routes.

5. Click on the ‘Save’ or ‘Save & Close’ button on the Ribbon to add the record to ***target360***.

target360

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

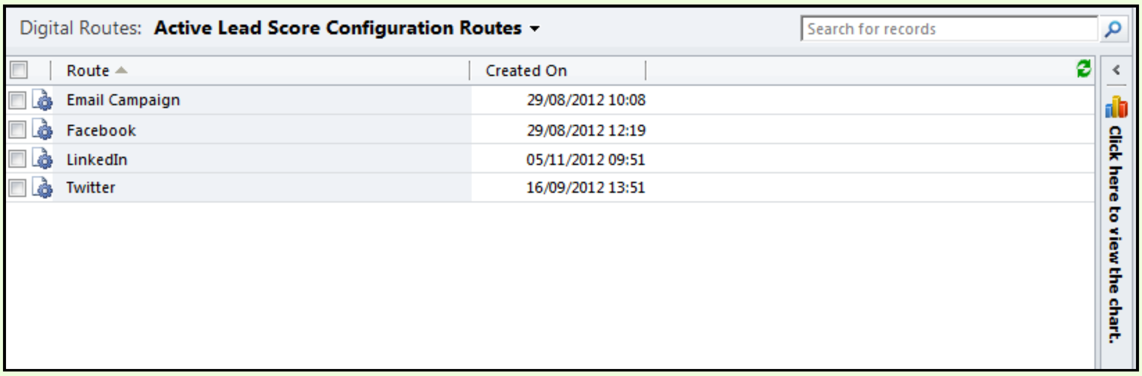


Figure 55 - The Digital Route Grid

This concludes the walkthrough.

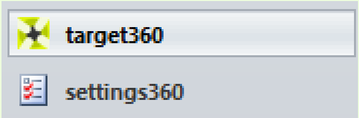
3.4.2 Walkthrough: Create a Digital Activity

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

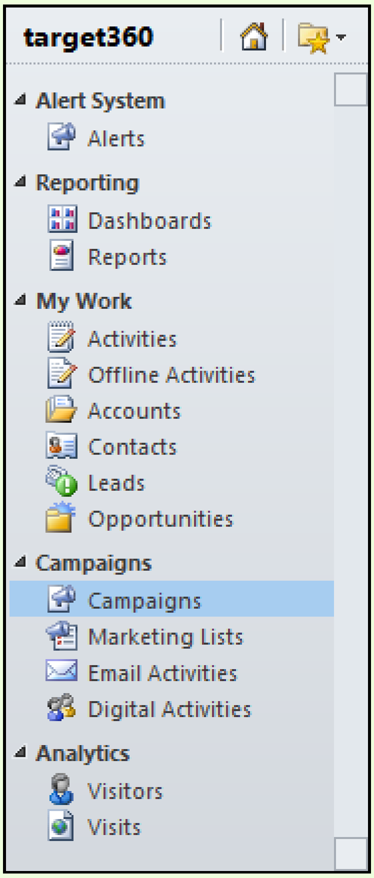
Multiple Digital Activities can be associated with a Campaign which may also include Email Activities and general Campaign Activities (Phone Calls, Appointments etc.).

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

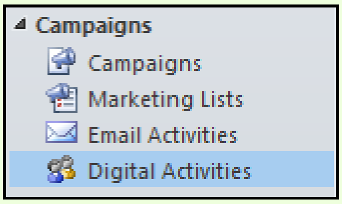
1. Click on 'target360' on the bottom of the navigation bar on the left-hand-side.



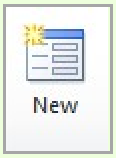
2. Click on 'Campaigns" in the Navigation Menu.



NOTE: You can also create a Digital Activity directly from the menu.



3. In this walkthrough we will create a new Campaign but you can use an existing one if you wish. Click on the 'New' button on the Ribbon:



4. Complete the mandatory field so give the Campaign a Name and a Proposed Begin and End Date

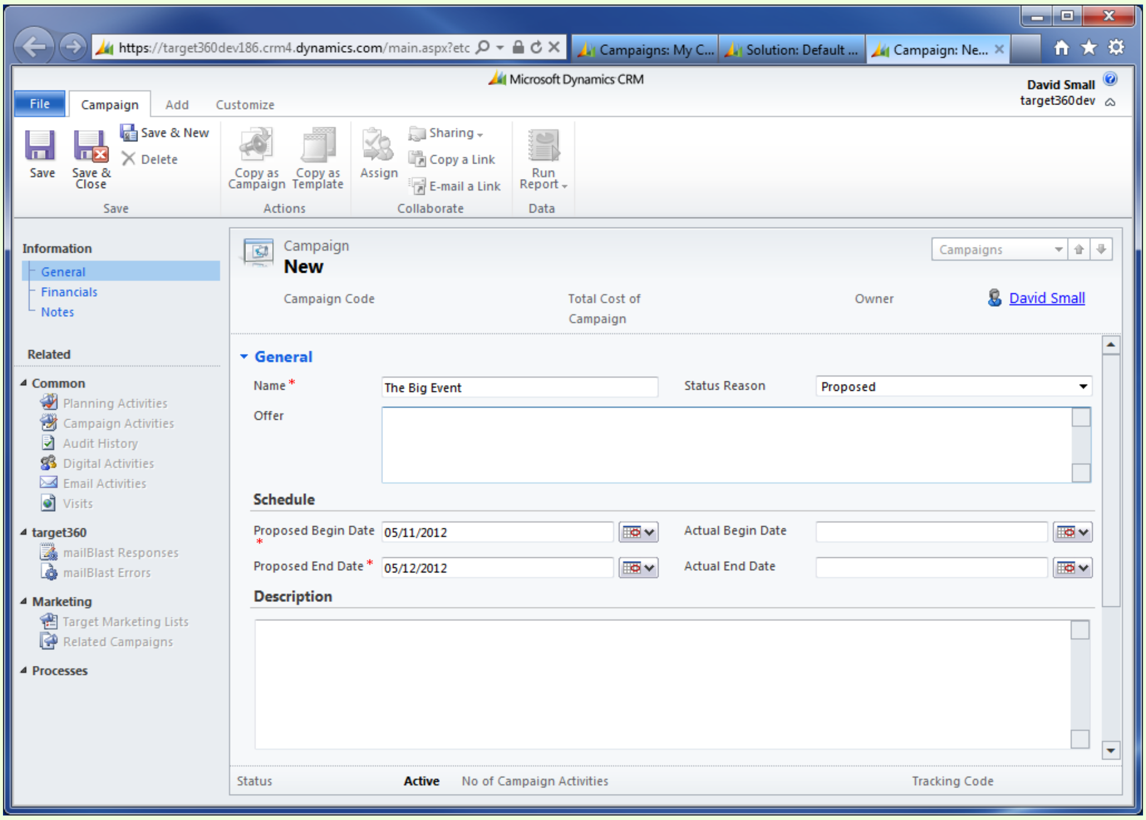
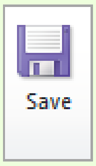
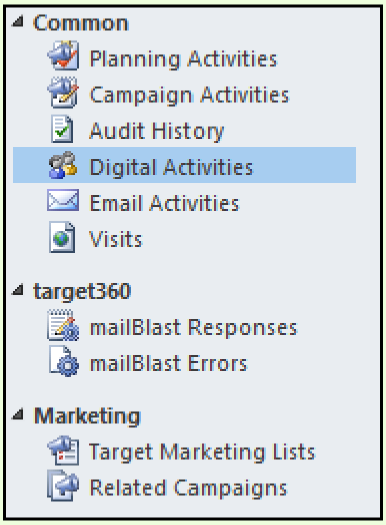


Figure 56 - The Campaign Form

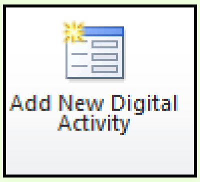
5. Click 'Save' to save the record.



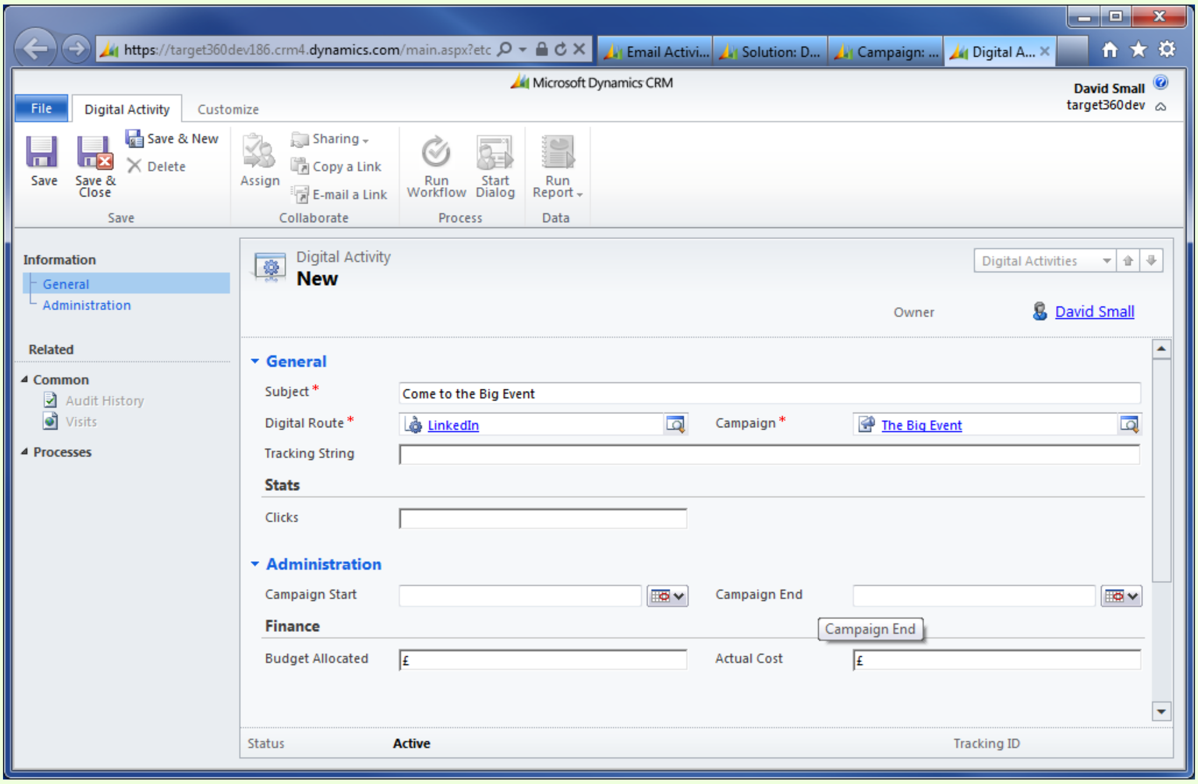
6. Click on Digital Activities in the Navigation Menu.



7. Click on the "Add New Digital Activity" button on the Ribbon:

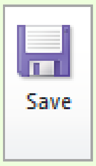


8. Give the Digital Activity a subject and select a Digital Route.



In this walkthrough we have created the digital activity from a campaign so the Campaign field will be populated for us by the system. If you have created the activity directly from the menu then you would have to select a Campaign.

9. Click 'Save' to save the record.



10. The Tracking code field will be populated after the record has been saved.

You can now append this to any links you plan to put on LinkedIn, for example:

www.mysite.com/bigevent.htm?~ecwa~=0000000011~004~0001

This concludes the walkthrough.

4 Lead Scoring

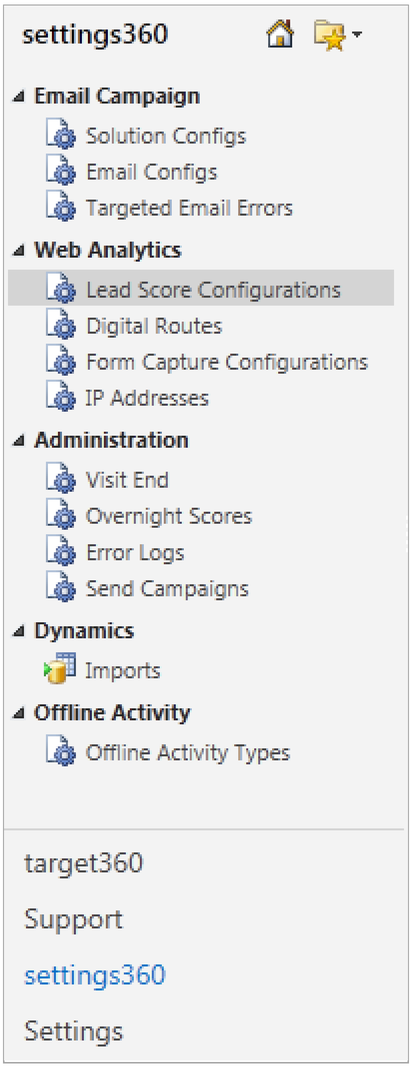
4.1 Administering Lead Scoring

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.

Warning
If you add more than one record, this will lead to unexpected results and scoring may become unpredictable.

The Lead Score Configuration grid is shown below:

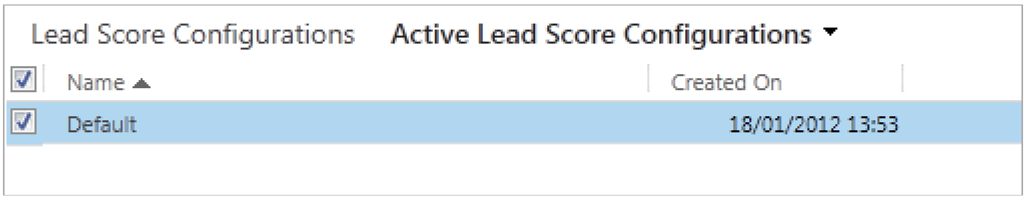
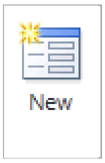


Figure 57 - An example of the Lead Score Configuration Grid.

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:

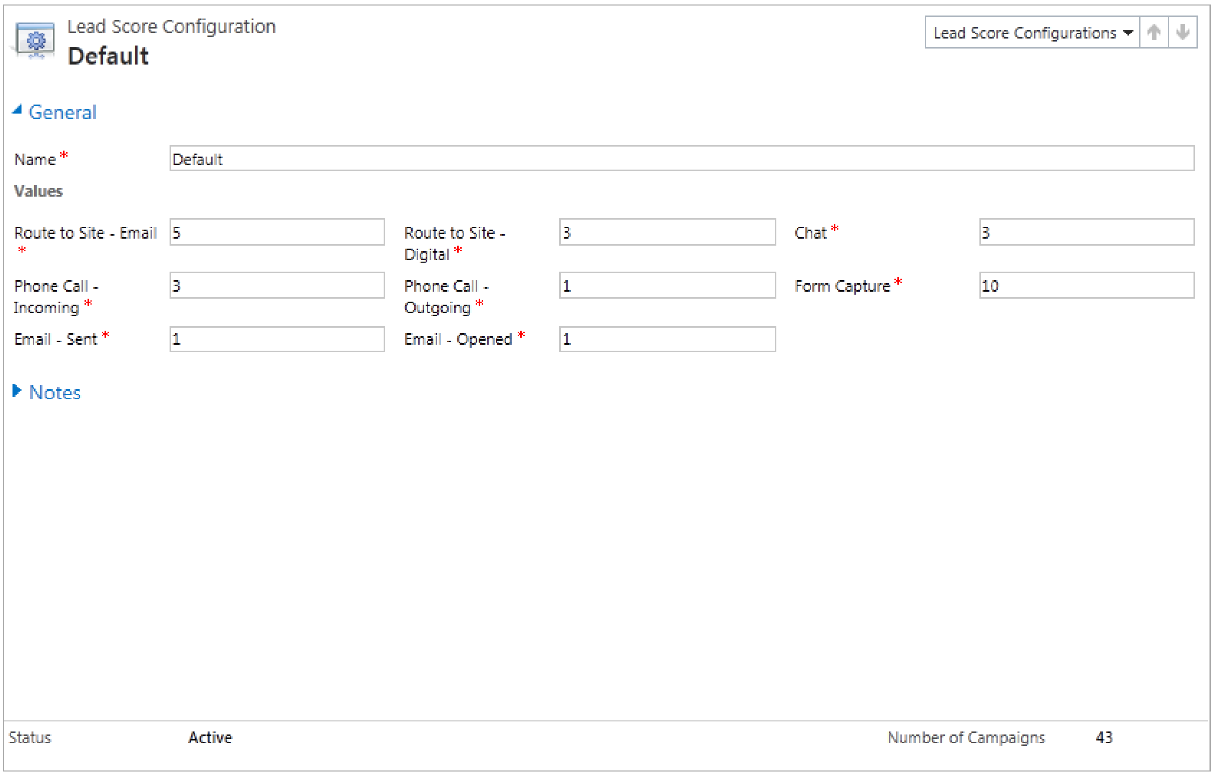


Figure 58 - An example of the Lead Score Configuration Form

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.

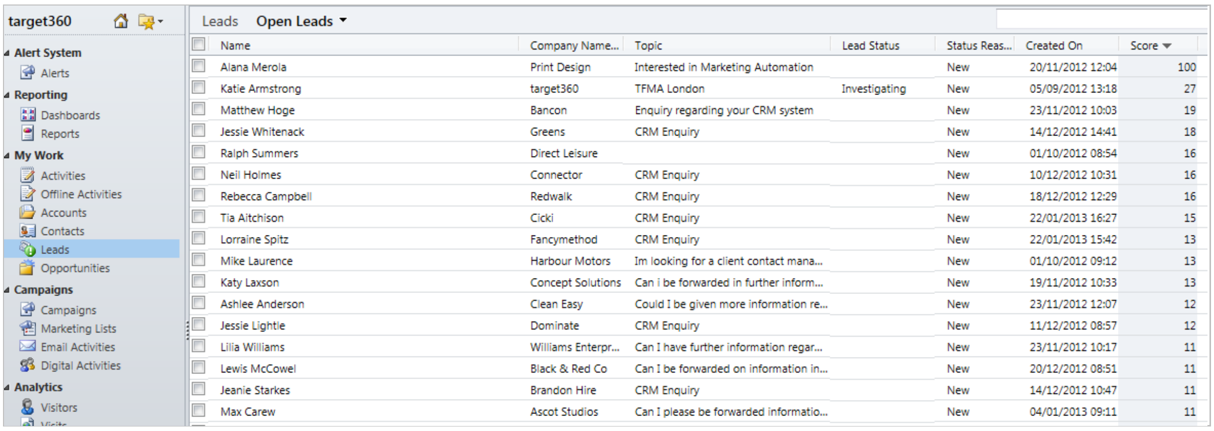
Warning
Scores can be changed at any time, and they will take effect from the next event. However all events prior to the change will NOT be re-scored.

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.



Name	Company Name...	Topic	Lead Status	Status Reas...	Created On	Score
Alana Merola	Print Design	Interested in Marketing Automation		New	20/11/2012 12:04	100
Katie Armstrong	target360	TFMA London	Investigating	New	05/09/2012 13:18	27
Matthew Hoge	Bancon	Enquiry regarding your CRM system		New	23/11/2012 10:03	19
Jessie Whitenack	Greens	CRM Enquiry		New	14/12/2012 14:41	18
Ralph Summers	Direct Leisure			New	01/10/2012 08:54	16
Neil Holmes	Connector	CRM Enquiry		New	10/12/2012 10:31	16
Rebecca Campbell	Redwalk	CRM Enquiry		New	18/12/2012 12:29	16
Tia Aitchison	Cicki	CRM Enquiry		New	22/01/2013 16:27	15
Lorraine Spitz	Fancymethod	CRM Enquiry		New	22/01/2013 15:42	13
Mike Laurence	Harbour Motors	Im looking for a client contact mana...		New	01/10/2012 09:12	13
Katy Laxson	Concept Solutions	Can i be forwarded in further inform...		New	19/11/2012 10:33	13
Ashlee Anderson	Clean Easy	Could I be given more information re...		New	23/11/2012 12:07	12
Jessie Lightle	Dominate	CRM Enquiry		New	11/12/2012 08:57	12
Lilia Williams	Williams Enterpr...	Can I have further information regar...		New	23/11/2012 10:17	11
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
Max Carew	Ascot Studios	Can I please be forwarded informatio...		New	04/01/2013 09:11	11

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:

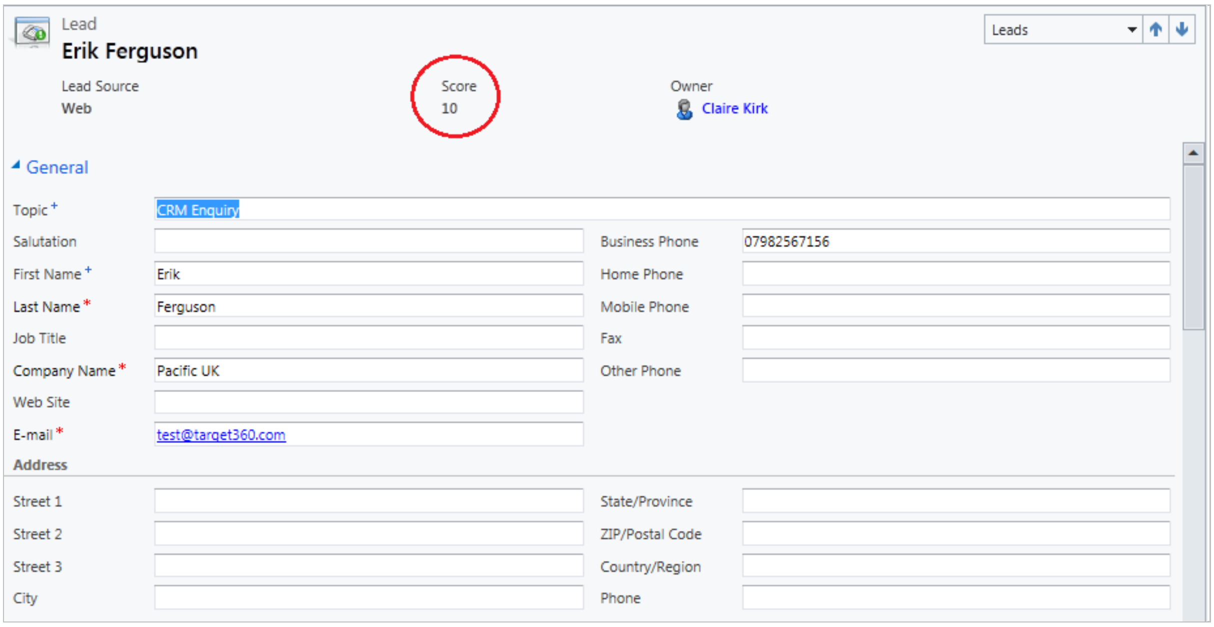


Figure 60 - An example of a Lead Form

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.

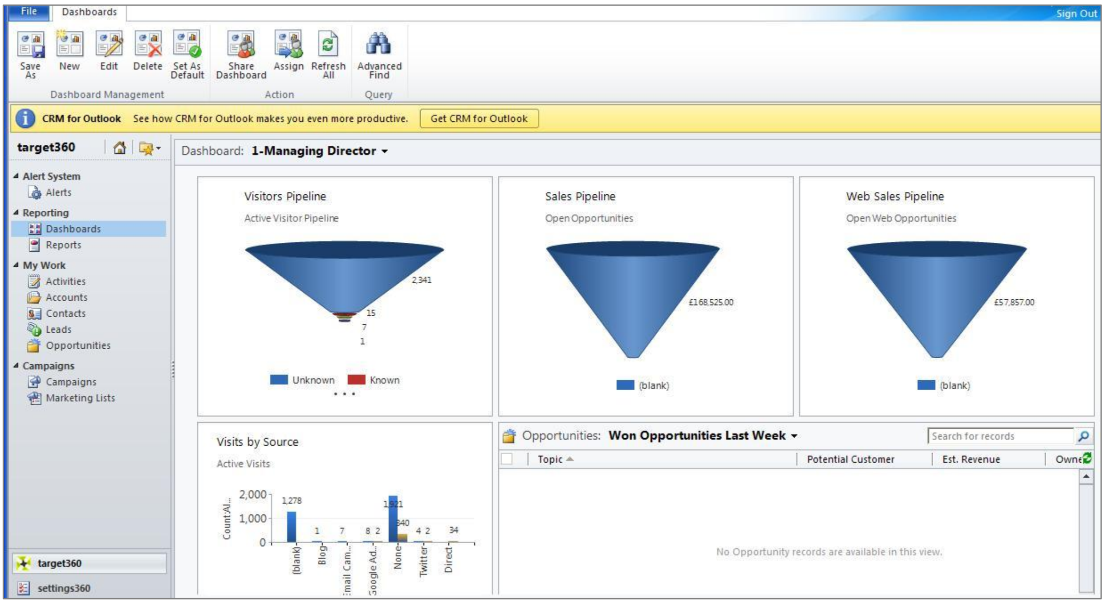


Figure 61 - The Dashboard

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:

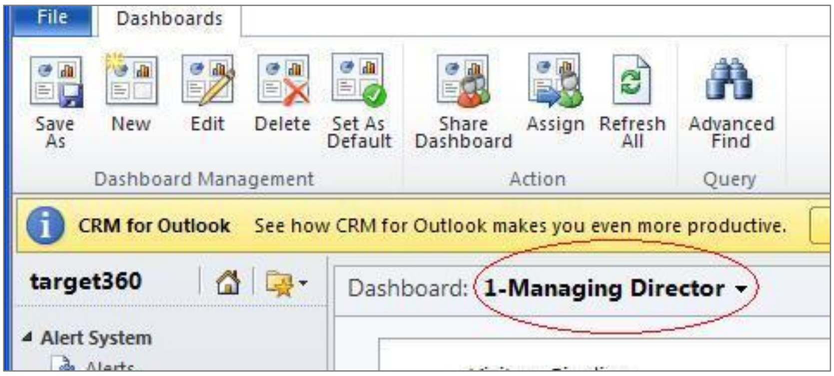


Figure 62 - Dashboard Views

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

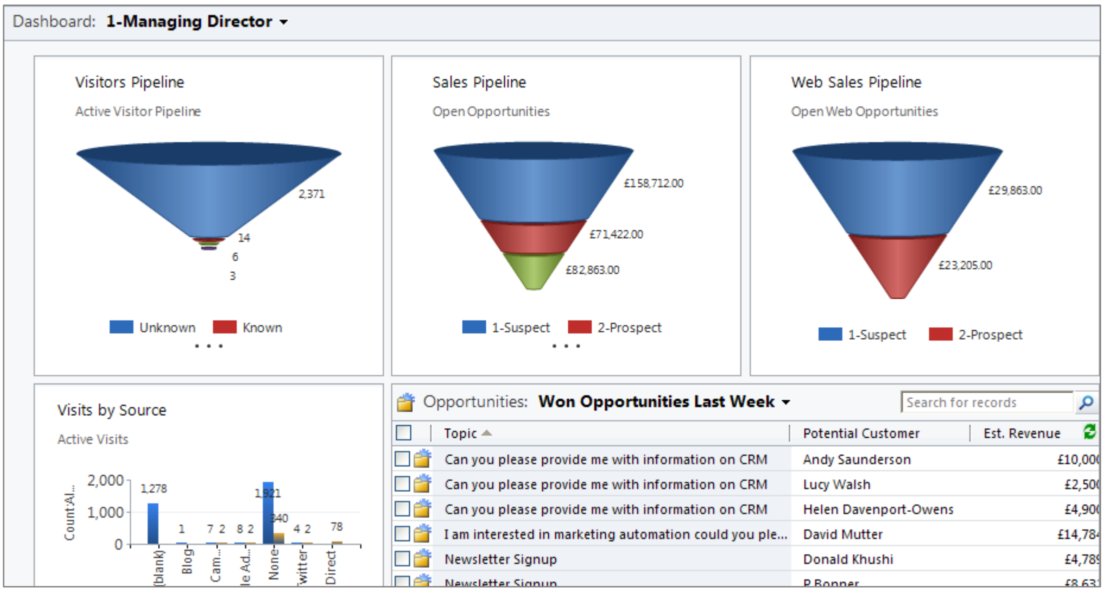


Figure 63 - Dashboard 1: Managing Director

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

Visitor Pipeline	A summary of website visits over a period, broken down into: • Unknown, • Known (leads) • Opportunities (qualified leads) and • Won (sales).
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

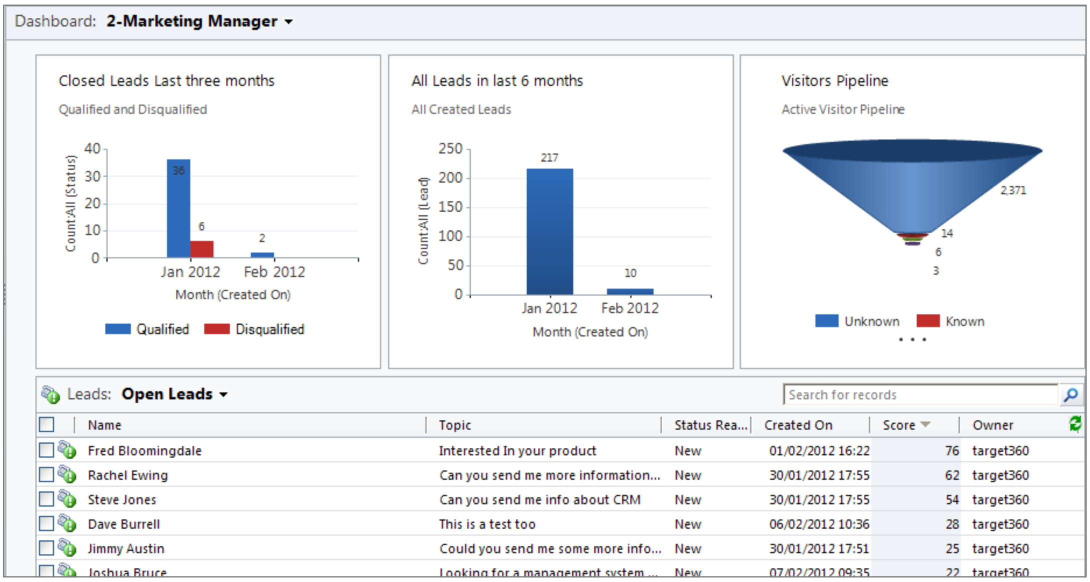


Figure 64 - Dashboard 2: Marketing Manager

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	A summary of website visits over a period, broken down into • Unknown, • Known (leads) • Opportunities (qualified leads) and • Won (sales).
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

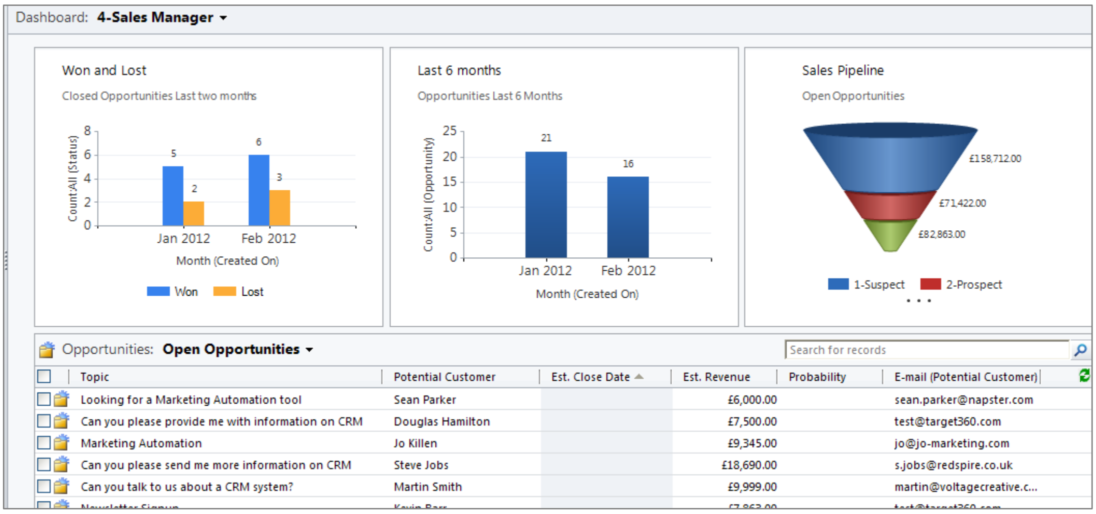


Figure 65 - Dashboard 4: Sales Manager

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

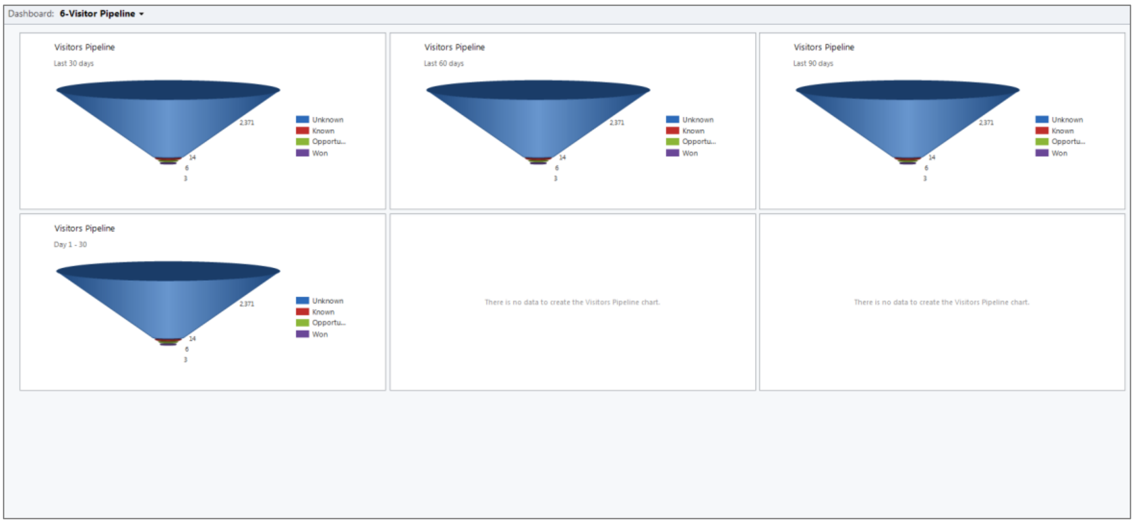


Figure 66 - Dashboard 6: Visitor Pipeline

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

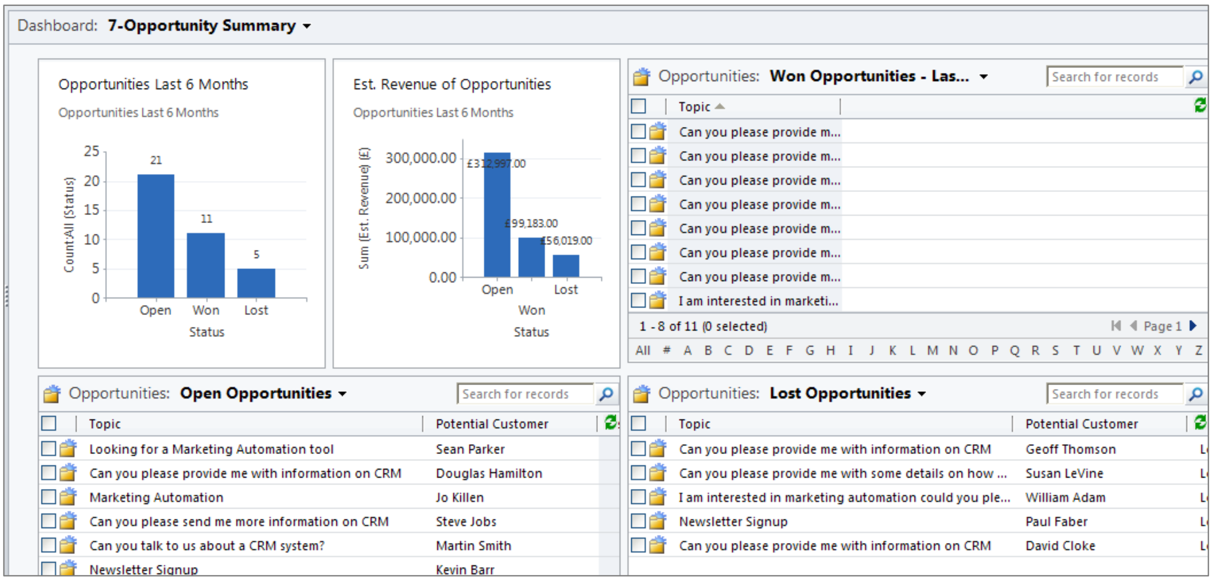


Figure 67 - Dashboard 7: Opportunity Summary

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.

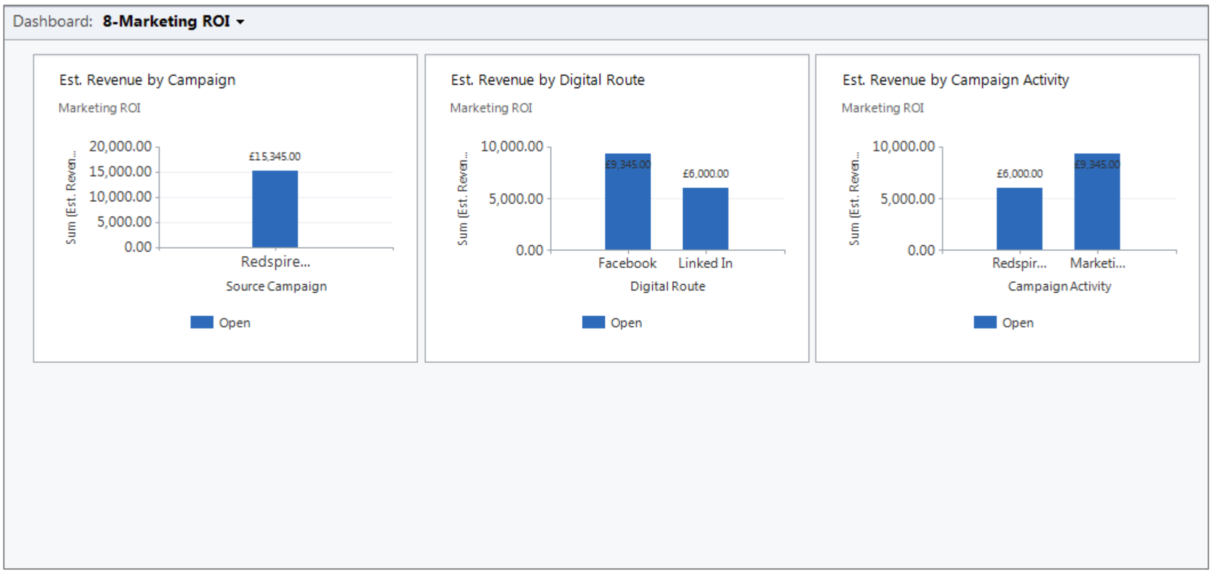


Figure 68 - Dashboard 8: Marketing ROI

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 Activity	Display of expected revenue for all campaign activities that act as sub-campaigns.

6.1.9 Visitor Analysis

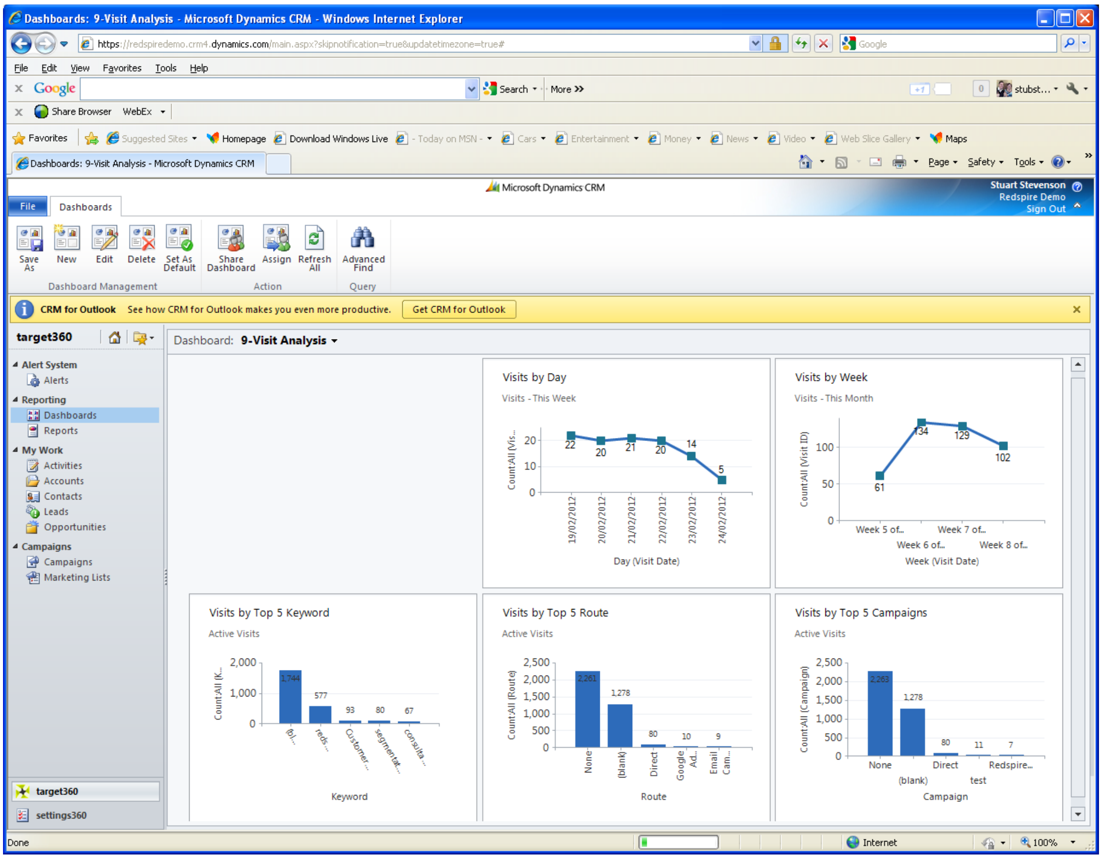


Figure 69 - Dashboard 9: Visitor Analysis

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

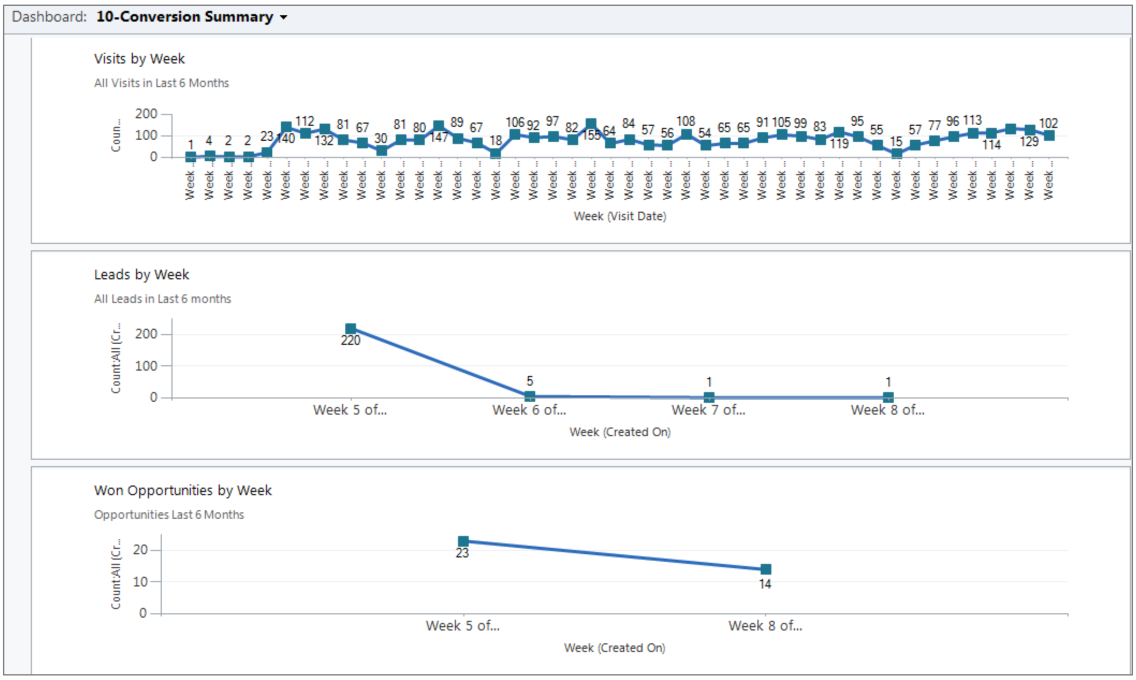


Figure 70 - Dashboard 10: Conversion Summary

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.

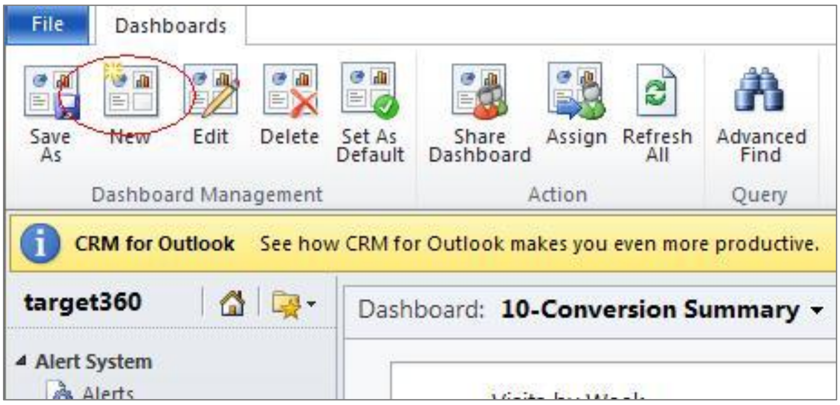


Figure 71 - The New Dashboard Button on the Ribbon

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

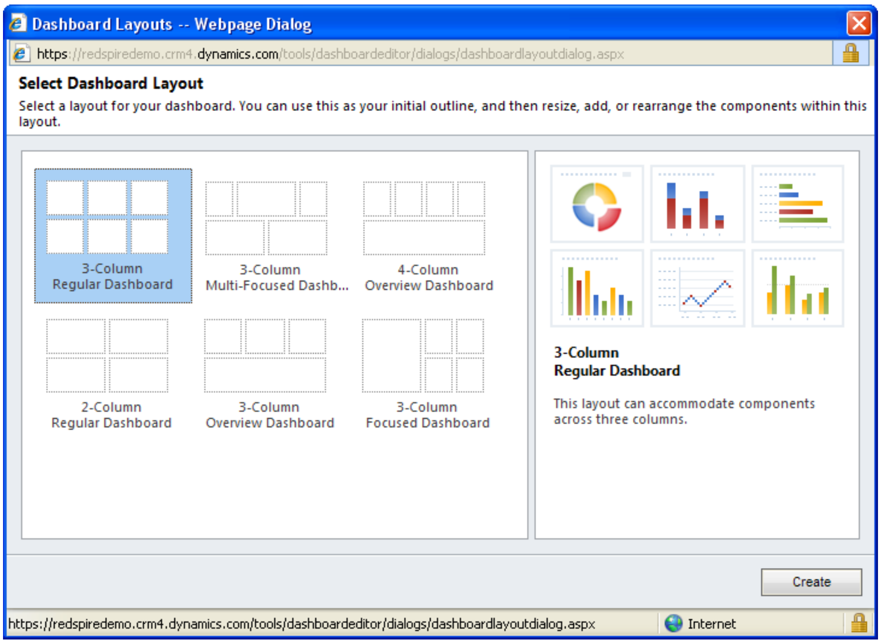


Figure 72 - The New Dashboard Wizard

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							
	⊞ **09/05/2011**		**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
	⊞ **13/06/2011**		**1**	**0**	**1**	**31.00**	**0**
	⊞ **04/07/2011**		**7**	**7**	**0**	**0.00**	**0**
	⊞ **05/09/2011**		**1**	**1**	**1**	**0.00**	**0**
	⊞ **19/09/2011**		**2**	**2**	**0**	**0.00**	**0**
	⊞ **10/10/2011**		**3**	**3**	**2**	**0.00**	**0**
	⊞ **12/12/2011**		**2**	**2**	**0**	**0.00**	**0**
	⊞ **19/12/2011**		**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
	⊟ 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
⊞ 2012		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 Summary			
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
Bedfordshire	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
⊟ Google.co.in		6
⊟ Google.co.tz		2
⊟ 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

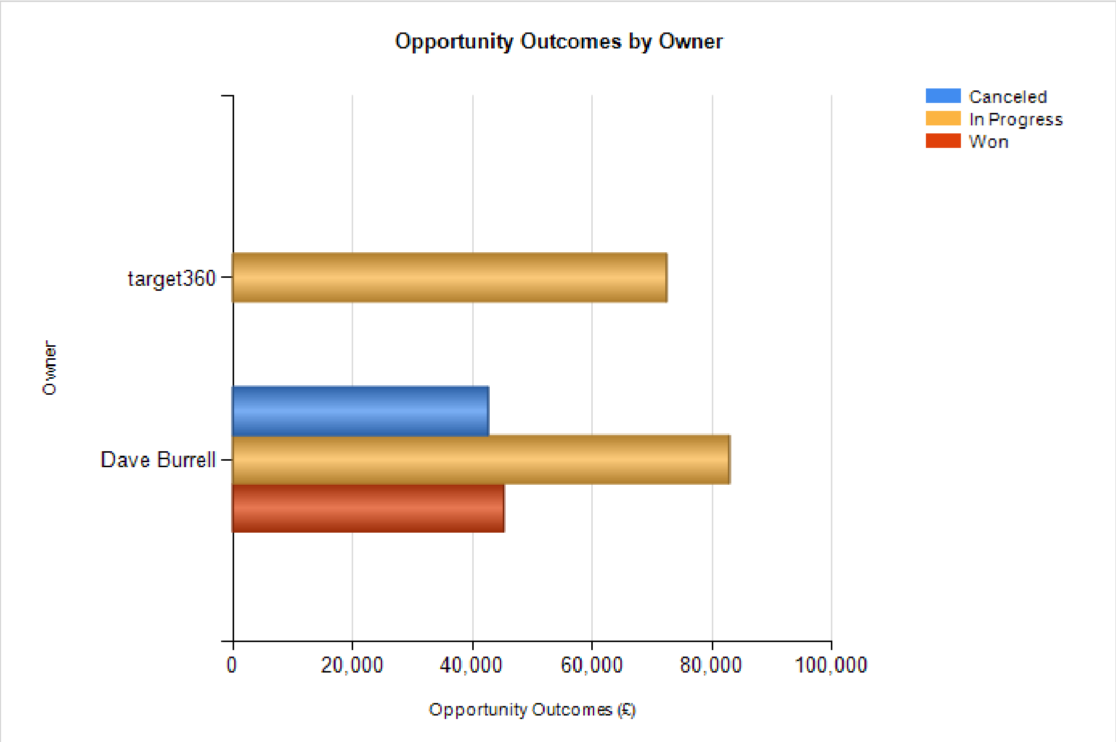


Figure 83 - Sample Opportunity Outcomes by Owner Chart

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.uk		**184**		
	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_management.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.php	1	0	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

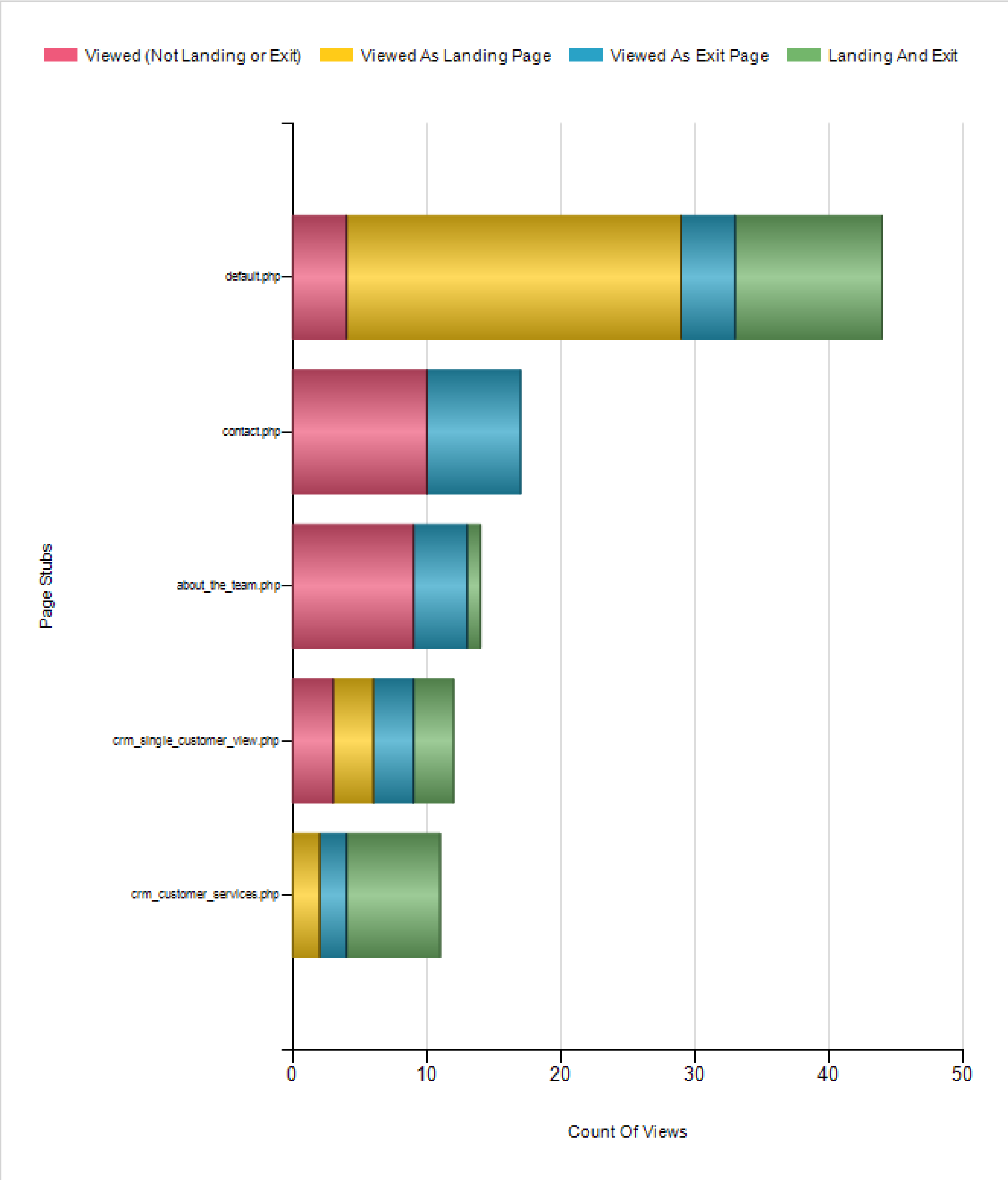


Figure 85 - Sample Count of Views Chart

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

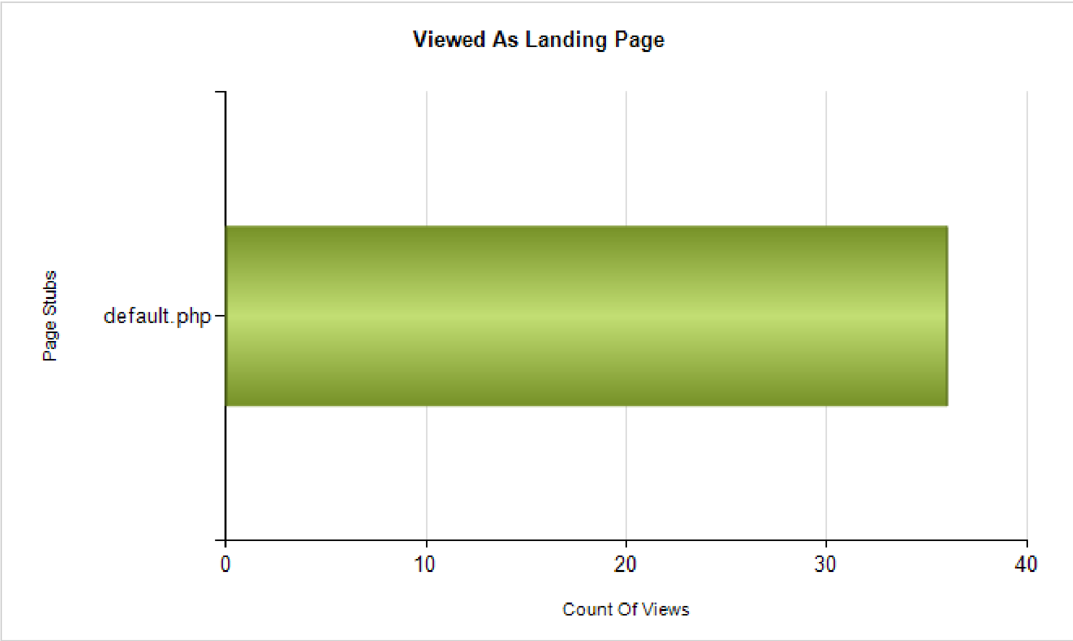


Figure 86 - Sample Viewed as Landing Page Chart

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

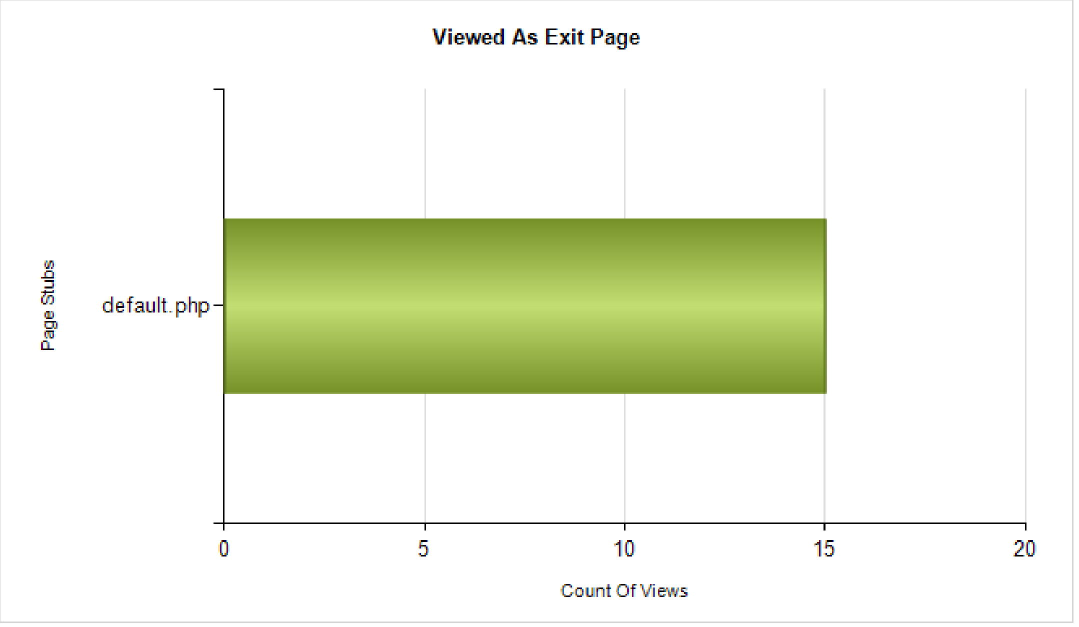


Figure 87 - Sample Viewed as Exit Page Chart

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.

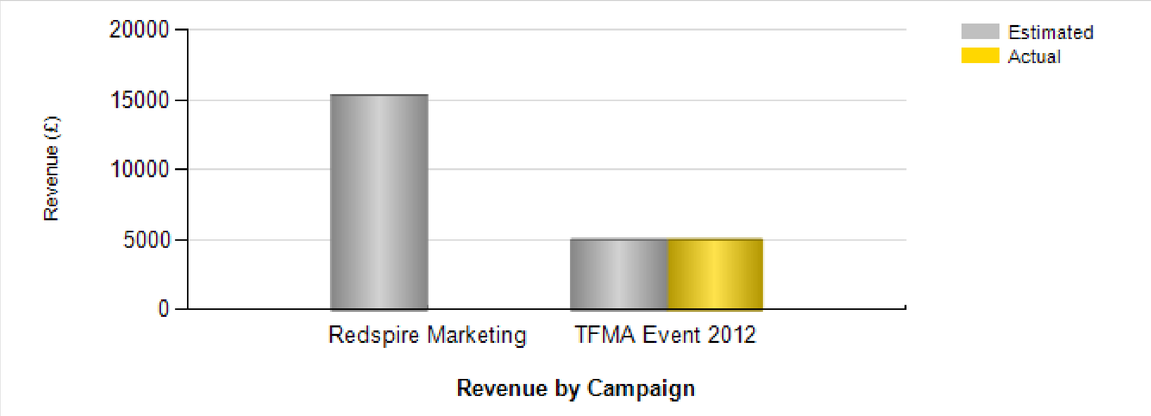
Pages are ordered by popularity and you can throttle the number of pages shown by raising the “Minimum Hits” parameter.

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.

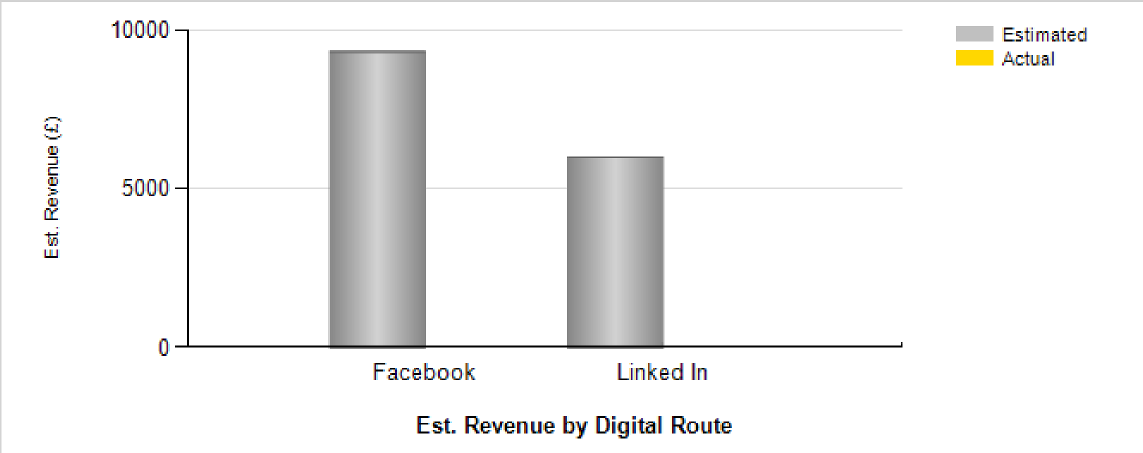
7.10.2 Tables



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

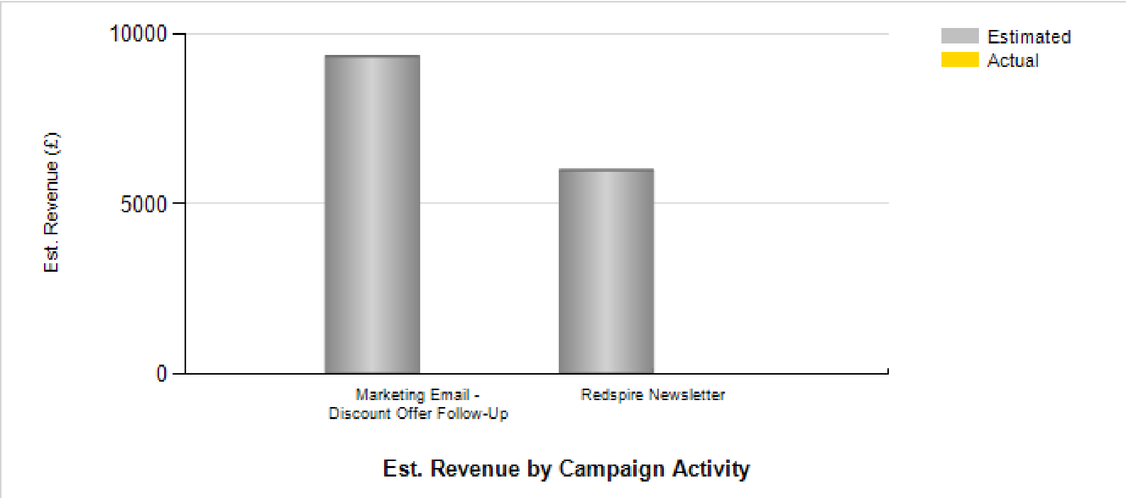
Column	Description
Campaign Budget	The Budget for the Campaign.
Campaign Target	The Target Revenue for the Campaign.
Opportunity Est. Revenue	The Total Estimated Revenue for In-Progress Opportunities related to the Campaign.
Opportunity Act. Revenue	The Total Actual Revenue for Won Opportunities related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

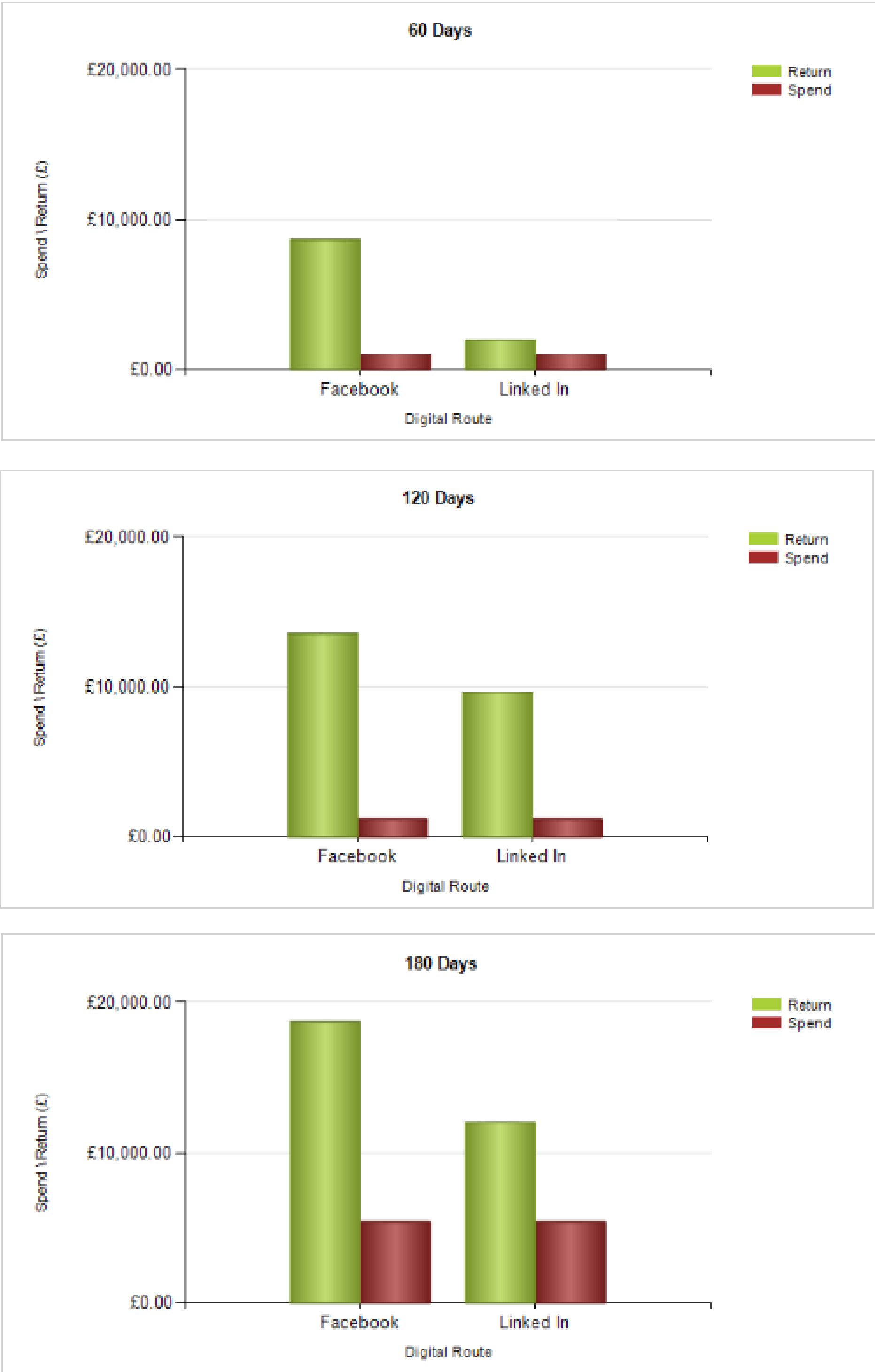


Figure 91 - Spend / Return vs. Digital Route over Time

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
⊟ **26/02/2012**		**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

Figure 92 - Sample Time and Number of Visits per Site Report

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.

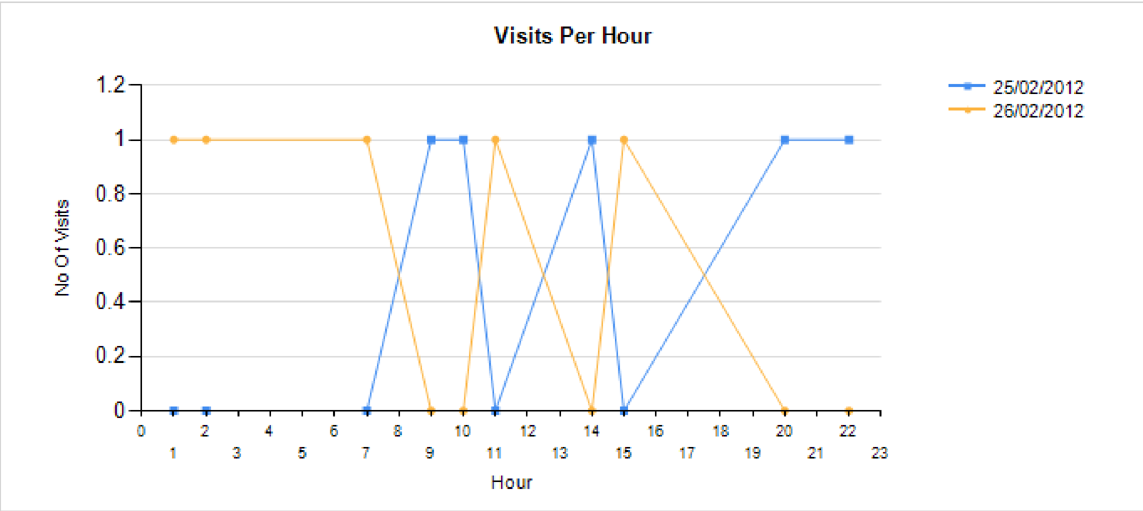


Figure 93 - Sample Visits by Hour Chart

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 Tables

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.

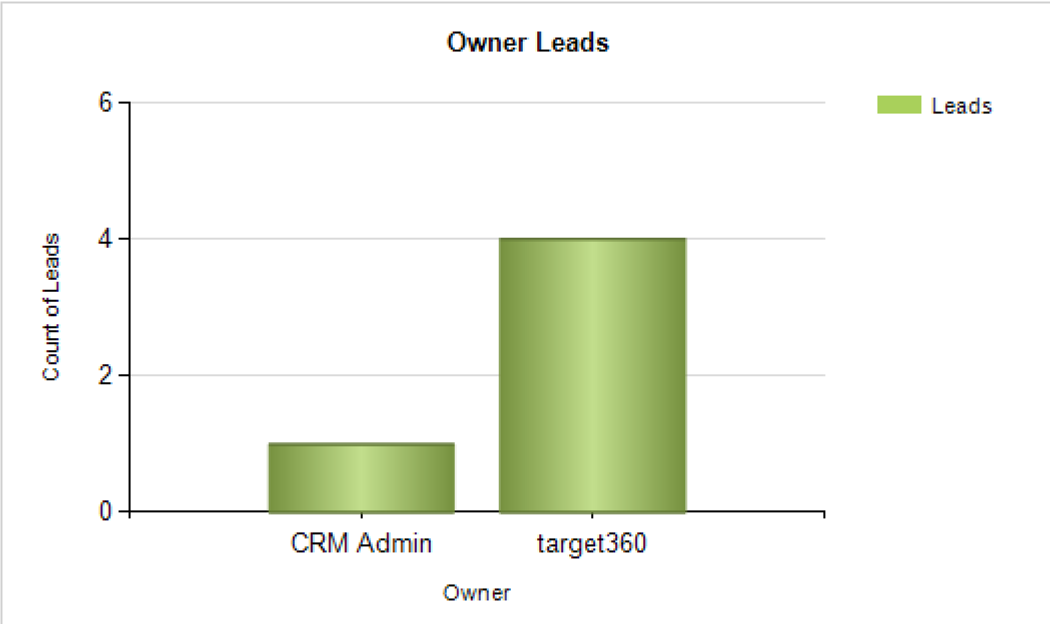


Figure 95 - Sample Owner Leads Chart

Owner Average Score Chart

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

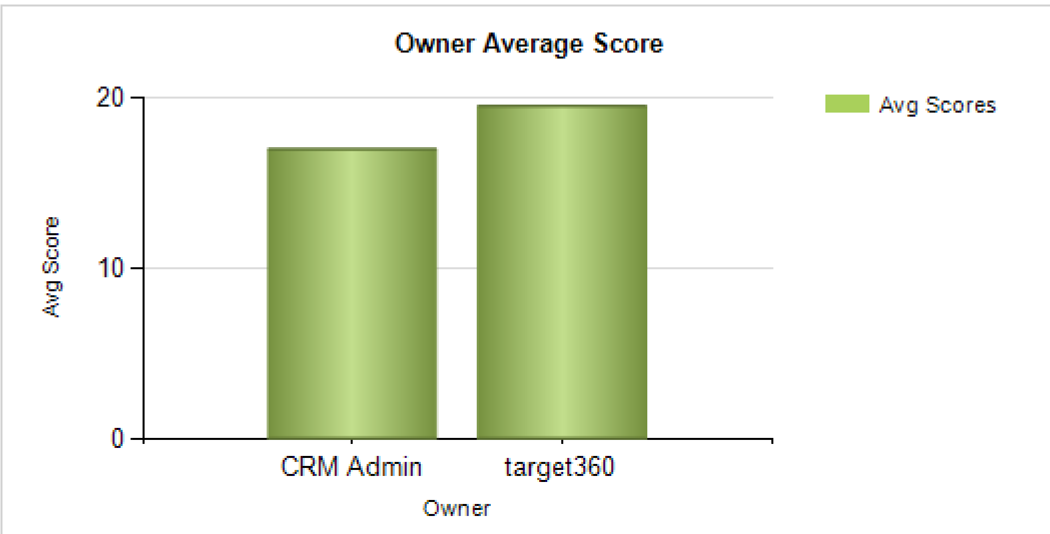


Figure 96 - Sample Owner Average Score Chart

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
Type	"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.

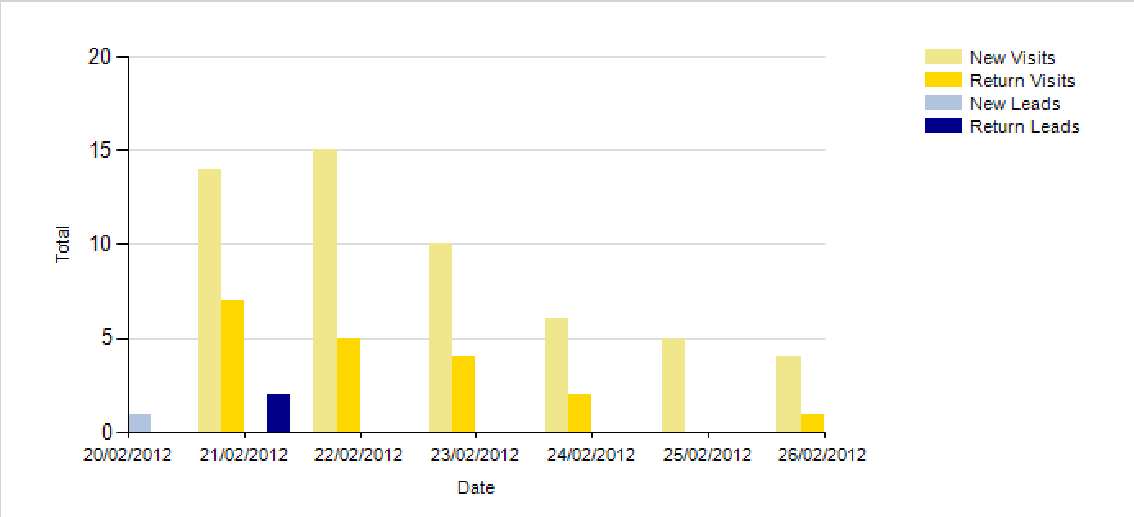


Figure 98 - Sample Visit / Lead Summary - Daily Chart

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.

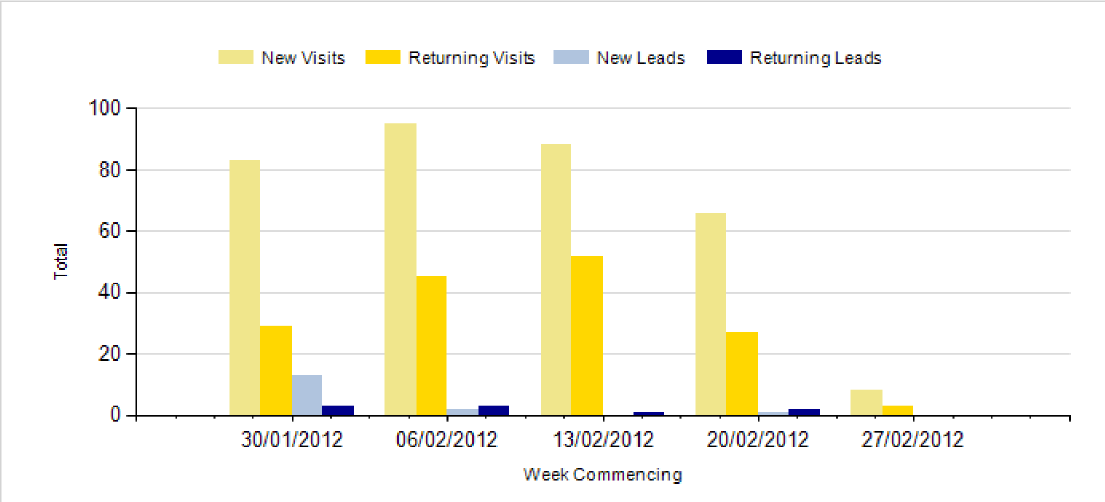


Figure 100 - Sample Visit / Lead Summary - Weekly Chart

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.

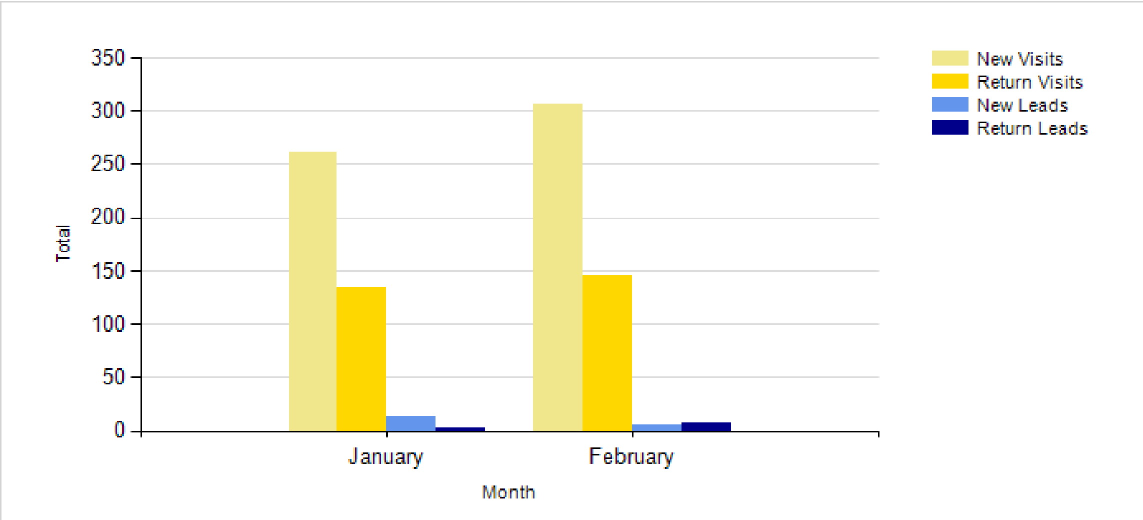


Figure 102 - Sample Visit / Lead Summary - Monthly Chart

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.

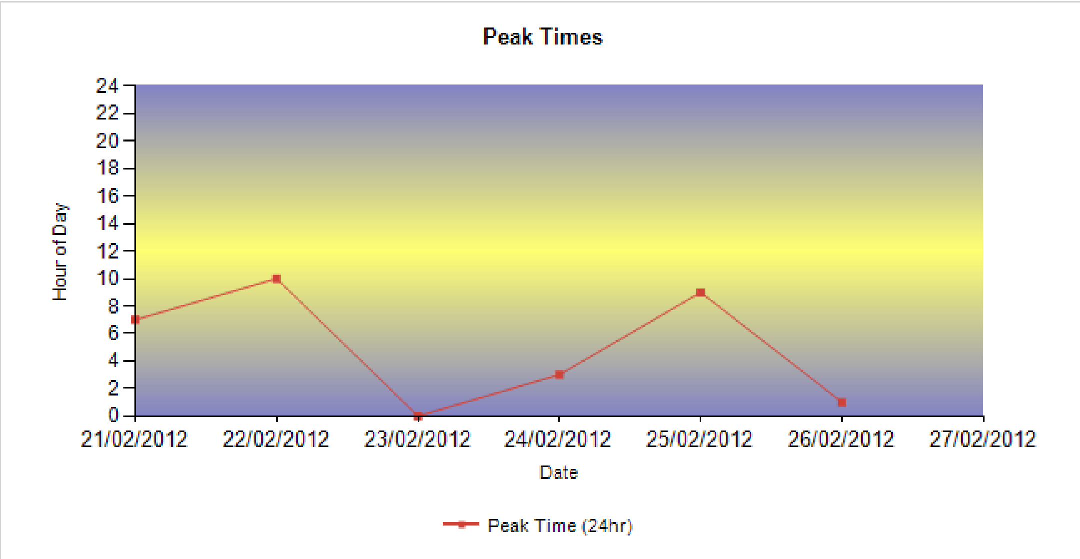


Figure 107 - Sample Peak Times Chart

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***

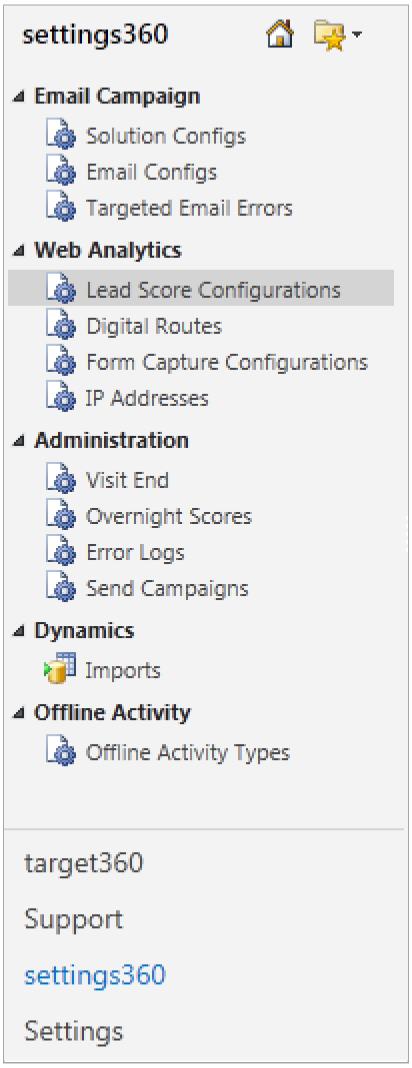
8.1 Lead Scoring

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.

Warning
If you add more than one record, this will lead to unexpected results and scoring may become unpredictable.

The Lead Score Configuration grid is shown below:

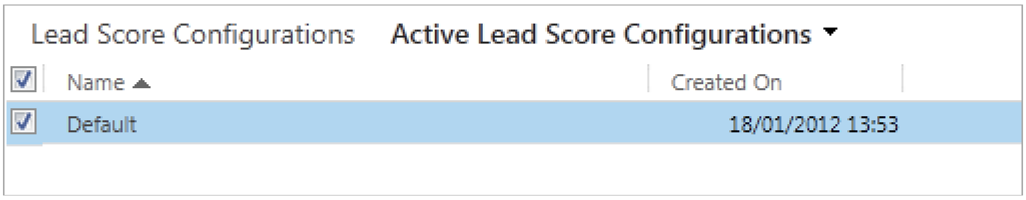
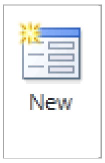


Figure 108 - An example of the Lead Score Configuration Grid.

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:

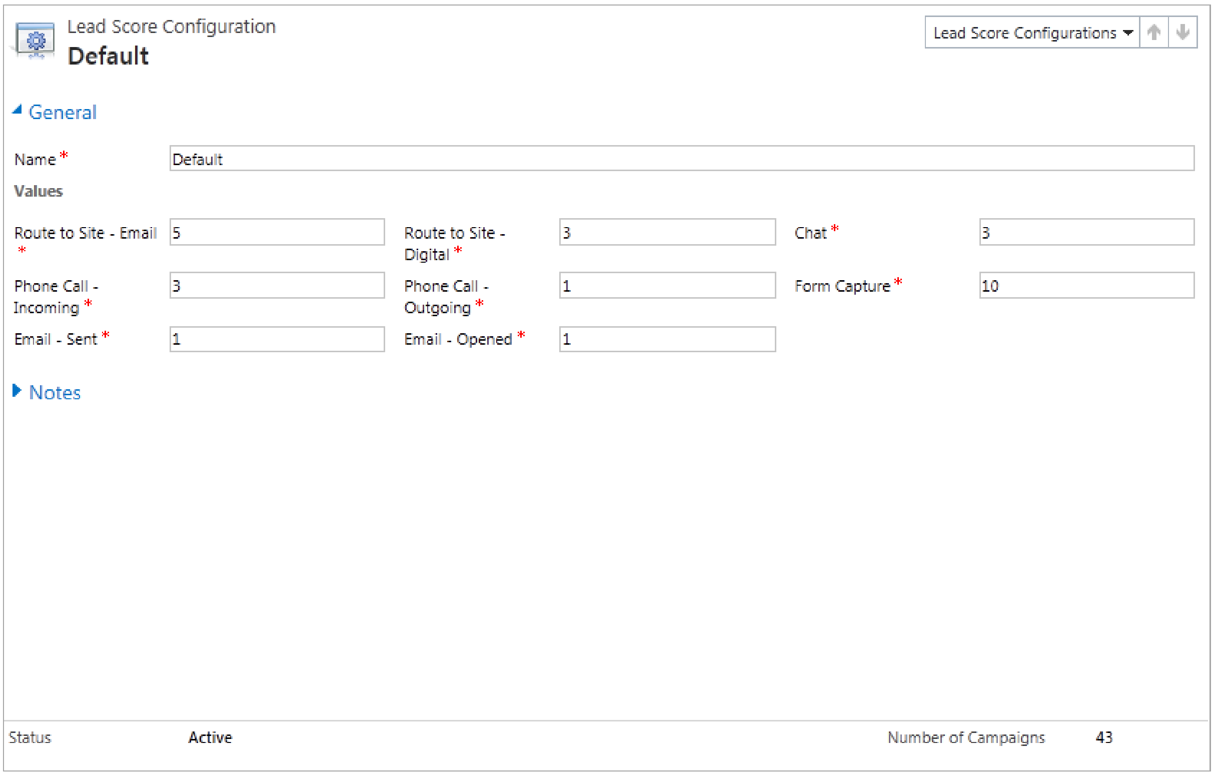


Figure 109 - An example of the Lead Score Configuration Form

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.

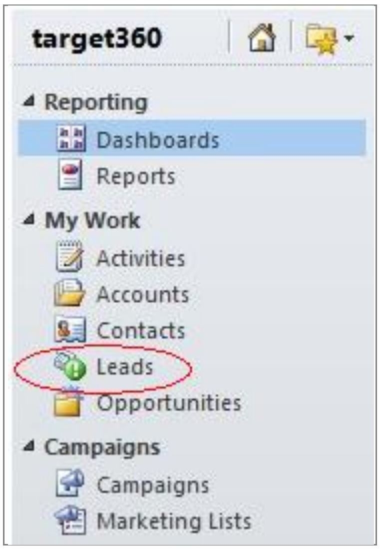


Figure 110 - The Lead button within the Navigation Pane

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

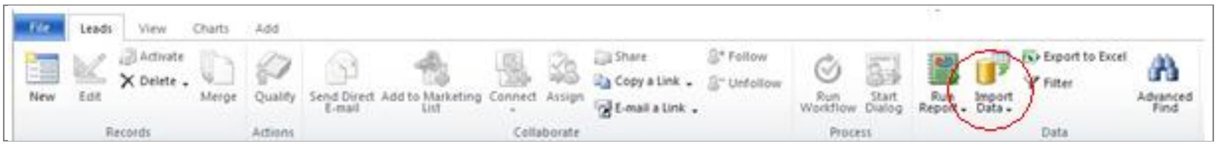
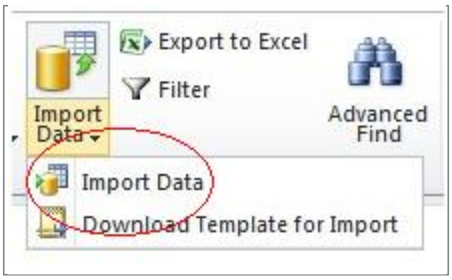


Figure 111 The Import Data Button on the Application Ribbon

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.

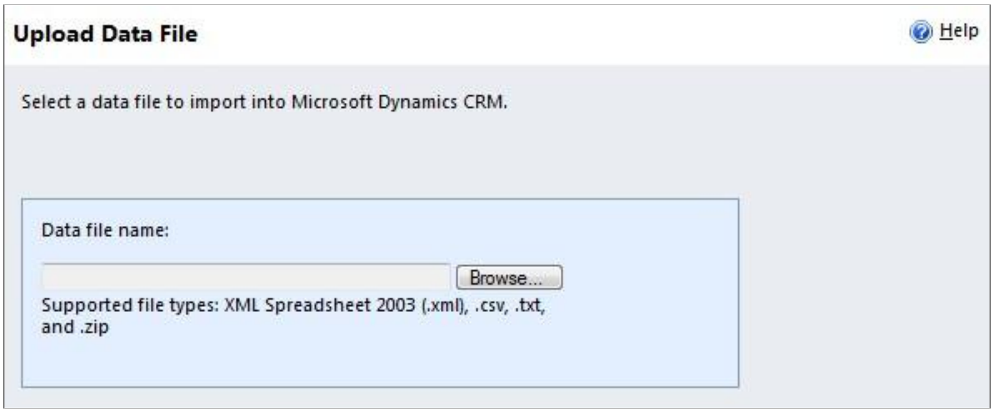
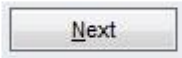


Figure 112 - The Upload Data File Form

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.

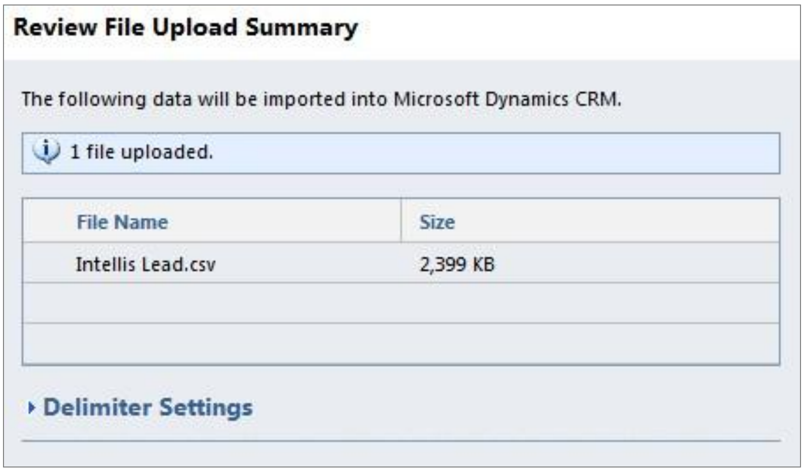


Figure 113 - The Review File Upload Summary Form

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

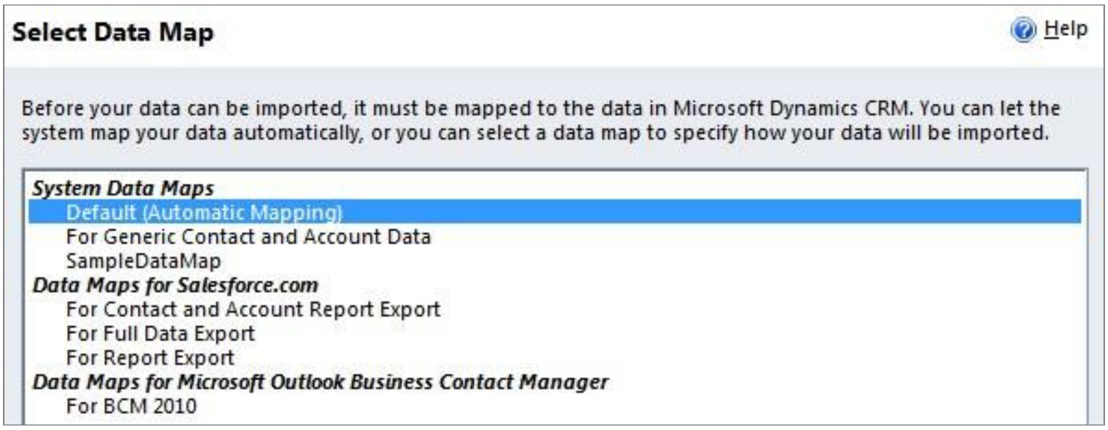


Figure 114 - The Select Data Map Form

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

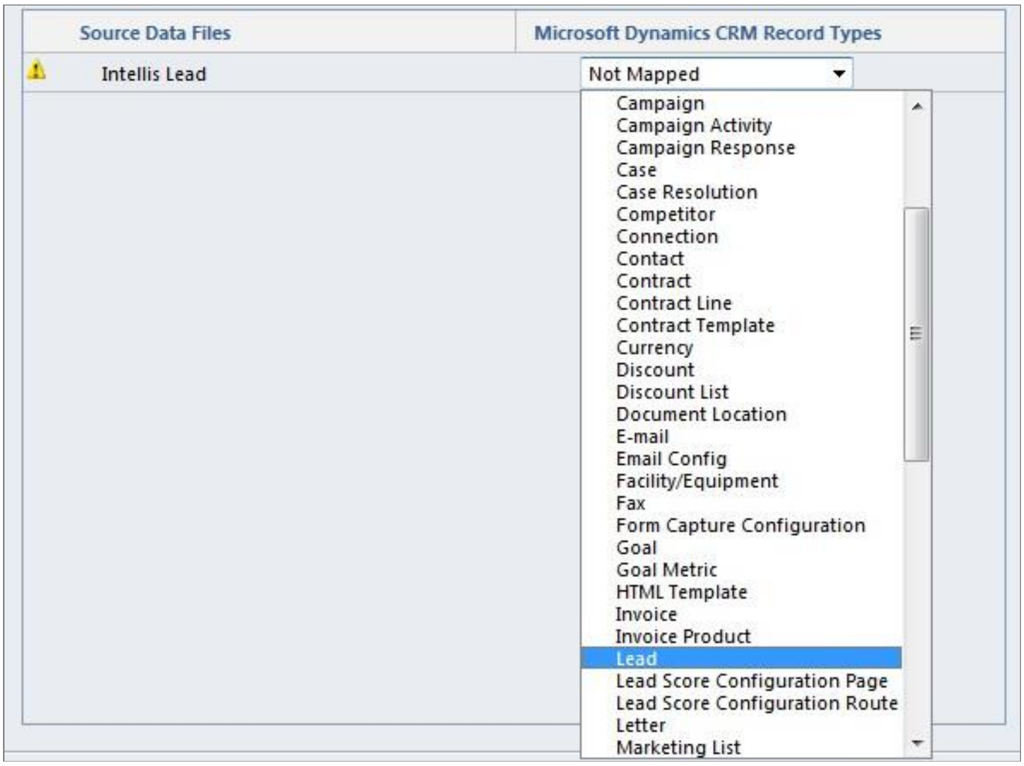


Figure 115 - Mapping your fields to target360 fields

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’.

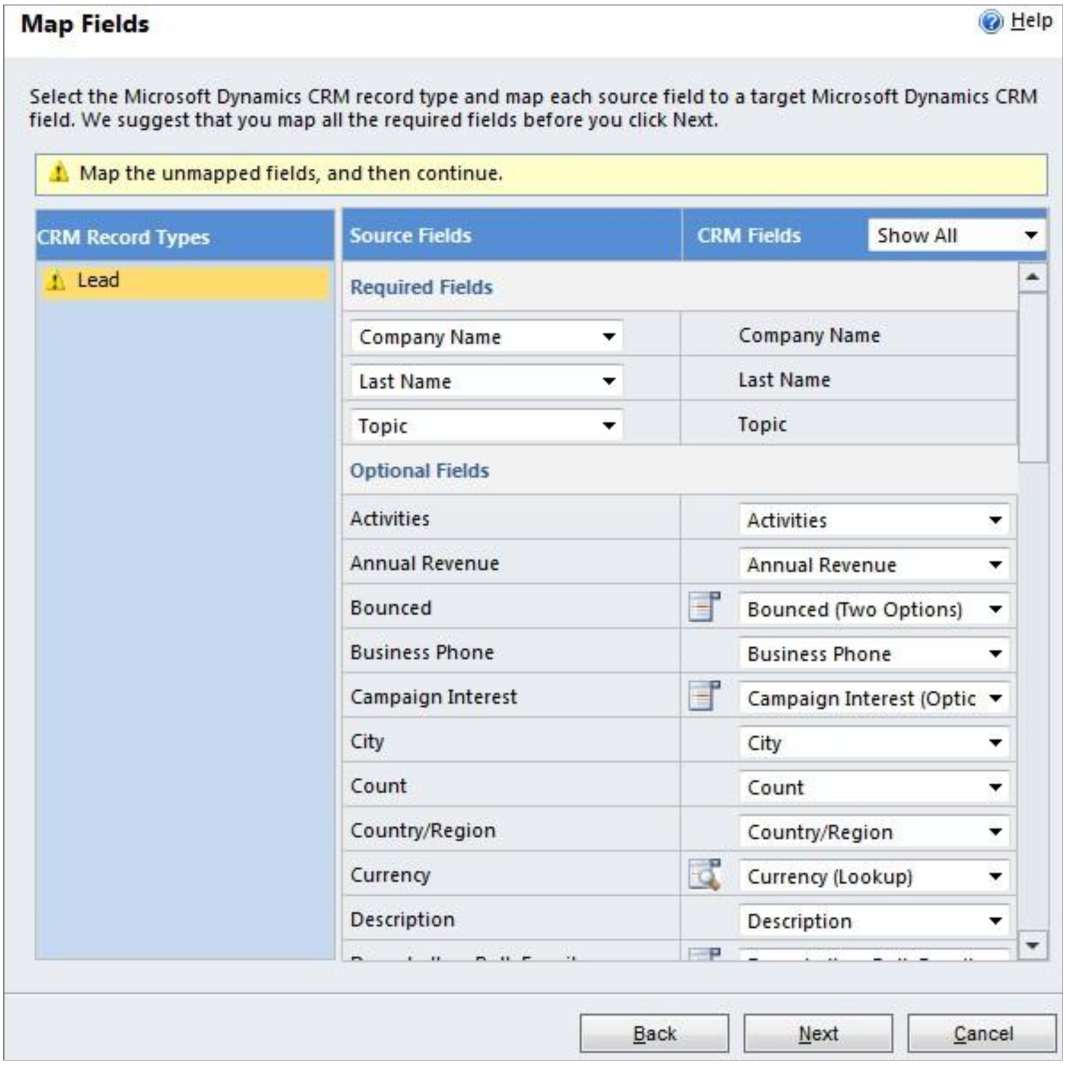
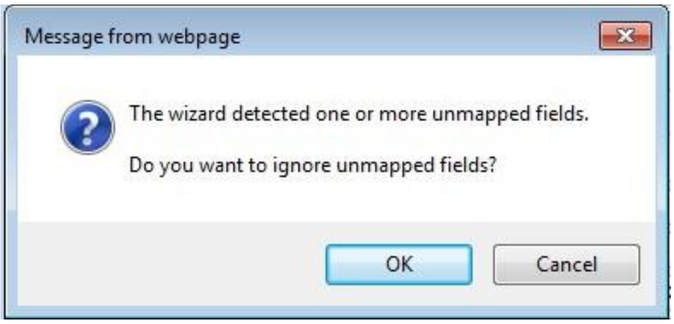


Figure 116 - Data Mapping Form

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’.

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’.

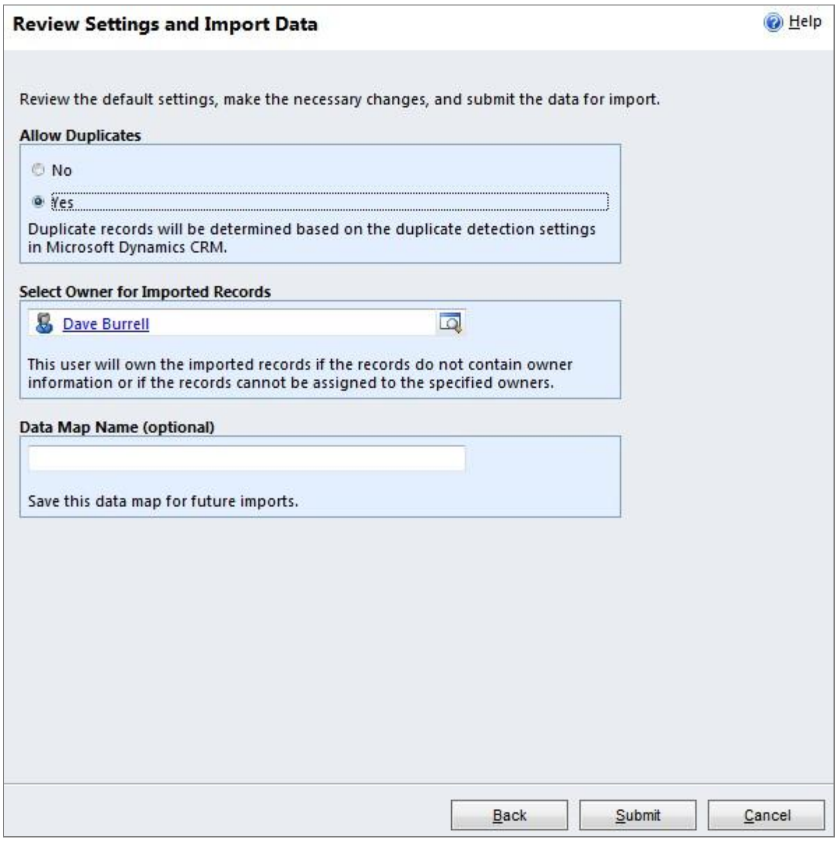


Figure 118 - Data Import – Review Settings

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.

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.