Advanced Course 1 – Automated Campaigns (Auto Responders)

What is an "Automated Campaign?"

The Automated Campaign feature allows you to automatically send a series of pre-recorded or pre-written information to your prospects or new recruits over a period of hours, days, weeks or months.

The purpose of an Automated Campaign is to allow you to automatically communicate important information on a pre-scheduled basis. This feature is quite advanced and will require that you be familiar with the other major features of your ClarifyOffice, such as creating E-mail Templates, recording and accessing a voice message, and uploading a fax document to your File Manager.

Your Automated Campaign may contain any voice message, fax document, or E-mail Template that you already have in the File Manager. You will need to have these components in the File Manager before you proceed to step two of this process. If you need instructions on how to record a voice message, upload a fax, or create an E-mail Template, please refer to the online Support menus found in your ClarifyOffice.

Step One - Create the Appropriate Contact Folders

An Automated Campaign is initiated by the act of placing a new contact into a specific folder in the Contact Manager where that Contact folder is associated with the campaign. It does not matter whether the contact is added manually or automatically imported into the folder.

Create a folder in your Contact Manager that will hold the contacts you want as part of this new campaign. Follow these steps:

1. Click on the "Contacts" tab.
2. In the Contacts Menu to the left of the main screen, click on "Folders Wizard."
3. In the main screen, select "Create a New Folder."
    1. Input a new name for your folder. For this example, create a folder called "Test Campaign."
    2. Click on the folder that you want to place it under. For this example, choose the "Everyone" folder.
4. Click on the "Add" button when you are done.

The new folder will appear under the "Everyone" folder.

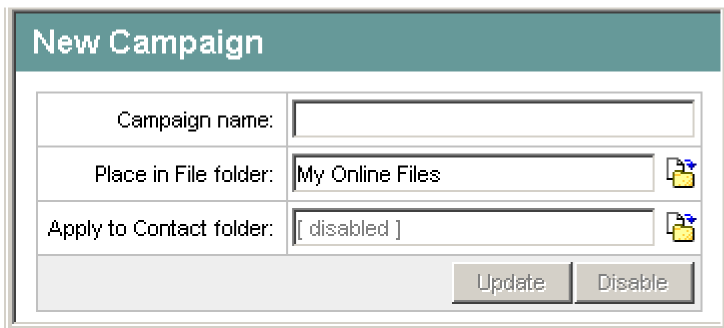
Now that you have created a Contact folder in which to store prospective recipients, create your new campaign!

Step Two - Create Your New Campaign

Prior to beginning this step, take a moment to create an E-mail Template called "My Immediate Response" and save it in the "My Online Files" folder of the File manager. (Instructions on how to create an E-mail template can be found in the online Support guide under the "09. Files (System)" section.)

To create a new campaign:

1. Click on the "New " menu at the top of your ClarifyOffice and choose "Campaign…" A window titled "New Campaign" will appear.



2. Type in the name of your new Campaign in the field adjacent to "Campaign Name." For this example, type "My Test Campaign."

3. Click on the icon adjacent to "Place in File folder:" and choose a folder in your **File Manager** where you want to save the campaign.

4. Click on the icon adjacent to "Apply to Contact folder:" to select the folder in your **Contact Manager** that will contain the names of those contacts you want to be a part of this campaign. (For this example, choose the "Test Campaign" folder you created in Step One above.)

   Note: The Campaign Manager is designed for sending information to people who know you personally or already do business with your company and have requested to receive communications from you. Be certain that you are in compliance with the ClarifyOffice Acceptable Use Policy (https://www.secure-session.com/aup/index.asp) prior to using the Campaign tool. Also visit http://www.clarifynow.com/spam for more details on protecting your business.

5. Click on the "Update" button.

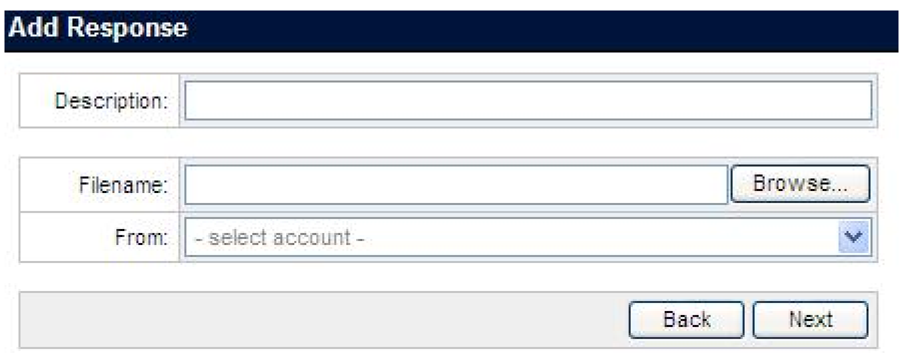
Step Three - Adding Items to Your New Campaign

Now you need to add items to this new campaign. (An item can be a pre-recorded voice message, fax, or E-mail Template.)

To add an item to your New Campaign, follow these steps:

1. In the “Edit Campaign” window you will see a blank box beneath which is a series of buttons.

Click on the “Add” button. A new window titled “Add Response” will appear in the main screen.



a. In the field adjacent to “Description,” type in a name for the new component you are about to add. For this example, type “My Immediate Response” You will now have to select the file that you want to add to your campaign. You can send an audio file (Greeting), fax, or e-mail.

b. Click on the “Browse” button. A new window will be displayed showing a list of folders in your File Manager.

   i. Select the appropriate folder the template is located in. For this example, click on the “My Online Files” folder. A list of all available e-mail documents will appear.

   ii. Click on the E-mail Template titled “My Immediate Response.”

   iii. Click on the “Open” button.

iv. You will see your primary e-mail address appear in the field adjacent to “From.” If you have more than one email account in the ClarifyOffice, use the drop-down to select the e-mail address from which this e-mail will be sent.

v. The “To” field allows you to choose the destination of this E-mail Template. Your choices include:

1. **E-mail 1** – Corresponds to the “E-mail 1” field in the recipient’s Contact Record.

2. **E-mail 2** – Corresponds to the “E-mail 2” field in the recipient’s Contact Record.

3. **E-mail 3** – Corresponds to the “E-mail 3” field in the recipient’s Contact Record.

4. **Internal** – This is used exclusively for ClarifyOffice resellers.

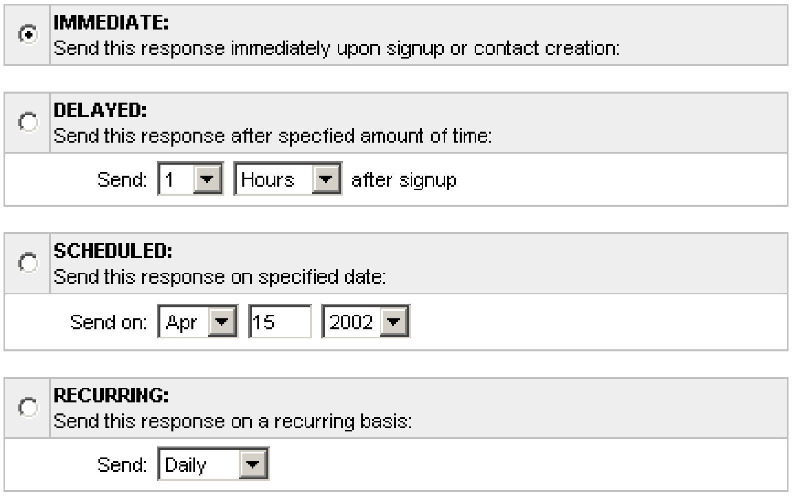
5. **Sender** – Sends this E-mail Template to you. This can be a handy tool if you want to know when a contact is approaching the end of the campaign cycle. (For example, you may have a template that simply says, “#firstname# #lastname# is almost finished with your prospecting campaign. Be sure to contact him or her at #dayphone#.”)

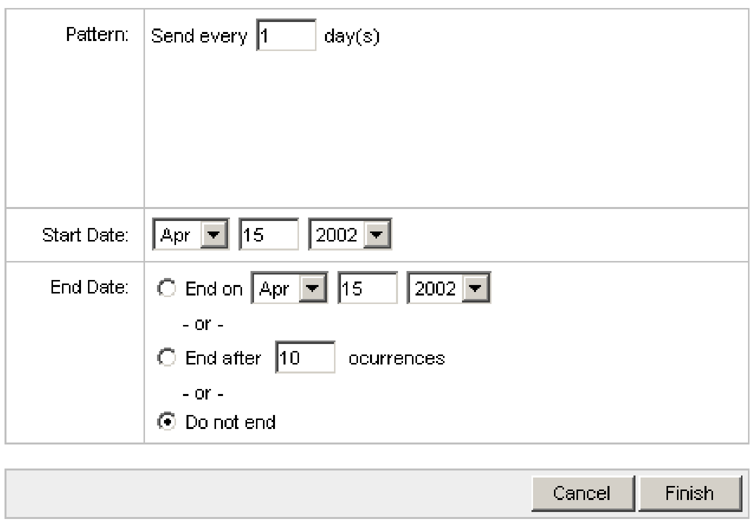
6. **Custom Field** – Corresponds to any custom field that contains an e-mail address.

7. **Other** – Allows you to enter any e-mail address you want. For example, if at some point in a campaign you want to send a message to a fulfillment house informing them that they need to send items to this contact, you can have that e-mail automatically generated based on the contact’s position within the campaign cycle.

c. Click on the “Next” button. A new window titled “Response Schedule” will appear in the main screen.

2. In the Response Schedule window, you will be able to specify when the e-mail will be delivered.





Note: Time of delivery begins when a contact is added to the “Test Campaign” contact folder. For example, if the first item of the campaign is set for delivery in one day and a new contact is added to the “Test Campaign” contact folder on Monday, the campaign item will be delivered to that contact on Tuesday.

a. **Immediate** - Select this item if you want the campaign item to be sent as soon as a new name is added to the Contact folder that is associated with this campaign.

b. **Delayed** - Select this item if you want the campaign item to be sent a certain number of hours, days, weeks, or months after a new name is added to the Contact folder which is associated with this campaign.

c. **Scheduled** - Select this item if you want the campaign item to be sent on a specific date.

d. **Recurring** - Select this item if you want the campaign item to be sent on a recurring basis.

   i. Daily - You may want the item to be sent every day, every other day, and so on. To choose the pattern of when the item should be sent:

      1. Pattern - In the field adjacent to "Send every..," type in the number of days. (e.g. if you want the item sent every three days, type the number 3 in this field)

      2. Start Date - Use the drop-down menus to choose the date on which your recurring item will begin to be sent.

      3. End Date - Use the drop-down menus to choose the date on which your recurring item will end.

         -OR-

         Enter in a number of times that you want the item to be sent in the field "End after occurrences."

         -OR-

         Select "Do not end" if you want this item to be sent indefinitely.

   ii. Weekly -

      1. Pattern - In the field adjacent to "Send every..," type in the number of weeks (e.g. if you want the item sent every three weeks, type the number 3 in this field). Then check day(s) of the week on which you want the item to be sent (you may choose as many as you like).

      2. Start Date - Use the drop-down menus to choose the date on which your recurring item will begin to be sent.

      3. End Date - Use the drop-down menus to choose the date on which your recurring item will end.

         -OR-

         Enter in a number of times that you want the item to be sent in the field "End after occurrences."

         -OR-

         Select "Do not end" if you want this item to be sent indefinitely.

iii. Monthly -

1. Pattern - In the field adjacent to “Send every..,” type in the number of months (e.g. if you want the item sent every-other month, type the number 2 in this field).

   -OR-

   Click on the radio button adjacent to “On the…” and select the appropriate week, day of the week, and number of months to send this item. For example, if you want to send this item on the second Thursday of every-other month, choose “2nd” and “Thursday” from the drop-down menus and type the number 2 next to “month(s).”

2. Start Date - Use the drop-down menus to choose the date on which your recurring item will begin to be sent.

3. End Date - Use the drop-down menus to choose the date on which your recurring item will end.

   -OR-

   Enter in a number of times that you want the item to be sent in the field “End after occurrences.”

   -OR-

   Select “Do not end” if you want this item to be sent indefinitely.

iv. Yearly -

1. Pattern - In the field adjacent to “Send every..,” type in the number of years (e.g. if you want the item sent other year, type the number 1 in this field).

   -OR-

   Click on the radio button adjacent to “On the…” and select the appropriate week, day of the week, and month to send this item. For example, if you want to send this item on the second Thursday of every July, choose “2nd,” “Thursday,” and “July” from the drop-down menus.

2. Start Date - Use the drop-down menus to choose the date on which your recurring item will begin to be sent.

3. End Date - Use the drop-down menus to choose the date on which your recurring item will end.

   -OR-

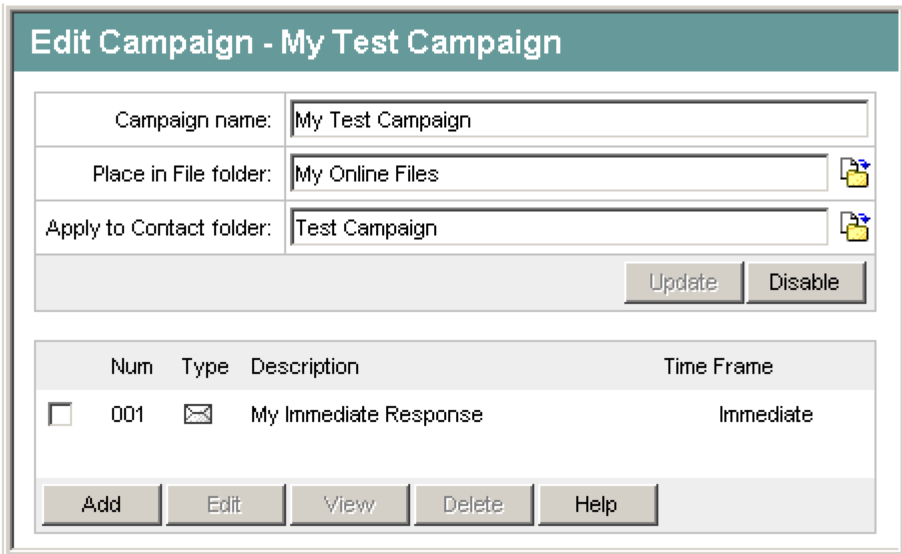
   Enter in a number of times that you want the item to be sent in the field “End after occurrences.”

   -OR-

Select “Do not end” if you want this item to be sent indefinitely.

e. Click on “Finish” once you have specified when the e-mail will be delivered.

The main screen will display the “Edit Campaign” window. You will see the e-mail that you just added in the box above the “add” button you clicked on at the beginning of this process.



Repeat these steps until you have individually added all desired items to your new campaign.

You did it! You just successfully completed the creation of a new campaign that will send all of your items in the series you specified!

Now that you have successfully created an Automated Campaign, all you need to do is to add a new contact (or import a list) to the New Campaign folder you created in Step One.

Note: If you apply a Campaign to a folder that contains existing contacts, those pre-existing contacts will NOT receive the items of the Campaign. Only new contacts added to a folder that is part of a Campaign will receive the items of the Campaign.

Editing an existing campaign:

If you want to make changes to the delivery time of any item within your campaign or replace it with another item, follow these steps:

1. Click on the “Files” tab.

2. In the Selection Menu to the left of the main screen, locate the folder in which you saved the campaign.

3. Click on the campaign that you wish to edit.

4. Choose the campaign item (greeting, fax, or e-mail) that you wish to change by clicking on the box next to the item. A check mark will appear in this box. (Note: If you have more than one item checked, the "Edit" and "View" buttons will be disabled."

5. Click on the "Edit" button.

6. In the "Add response" window,

   a. In the field adjacent to "Name," type in a new name for the campaign item.

   b. To replace this component with a new item, click on the "Browse" button. A new window will be displayed showing a list of folders in your File Manager.

      i. Use the drop-down menu adjacent to "Filename:" to select the appropriate folder. A list of all available e-mail documents will appear.

      ii. Click on the e-mail document you want to add to the campaign and then click on the "Open" button.

   c. The "Description" field does not automatically change when you do this. Be sure that you make changes to the "Description" accordingly.

   d. You may choose a different e-mail address in the field adjacent to "From:" if you have more than one e-mail account in your ClarifyOffice.

   e. Click on the "Next" button.

7. In the "Response Schedule" window, you can select a new time frame in which to send this component.

   a. **Immediate** - Select this item if you want the e-mail to be sent as soon as a new name is added to the Contact folder that is associated with this campaign.

   b. **Delayed** - Select this item if you want the e-mail to be sent a certain number of hours, days, weeks, or months after a new name is added to the Contact folder which is associated with this campaign.

   c. **Scheduled** - Select this item if you want the e-mail to be sent on a specific date.

   d. **Recurring** - Change the time frame as desired.

   e. Click on "Finish" once you have specified when the e-mail will be delivered. You will see an alert widow stating, "Are you sure you want to delete the current schedule and save this new one?" Click on "OK" if you want to save your changes.

Conclusion of Advanced Course 1

Now that you know how to create a campaign, take some time to consider how to organize your File Manager so that your campaigns are easily identifiable. You may want to create a folder for each campaign you create and then create a sub-folder under each campaign that will contain the E-mail Templates, fax documents, and greetings that will be included in that campaign. Or, you may decide that you want to keep all your campaigns and components in one folder. You decide what is best for you!

Advanced Course 2 – Custom Fields and Forms

Custom Fields

Every Contact Record in your Contact Manager comes with standard fields (such as Name, Address, City, and etc.). Some ClarifyOffice products allow you to create custom fields and add them to your Contact Records. If you find that the feature discussed on this page is not being displayed in your ClarifyOffice, chances are that your have a product that does not allow for this functionality. It would be best for you to contact the company that is supporting this product and ask them how you can get this feature added to your ClarifyOffice.

To Create Custom Fields:

1. Click on the "Contacts" tab.

2. Click on " Fields & Forms" in the Selection Menu to the left of the main screen. Two items will appear below this icon.

3. Click on " Fields" in the Selection Menu.

   The main screen will display all of the standard fields.

4. Click on " New Field" at the top of the main screen. The main screen will display "New Stored Field." This page has three fields:

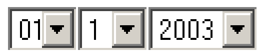
   a. "New Field Name" - Type in a name for your new field.

b. “Data Type” - Use this drop-down menu to select the type of field you want to create. Types of fields include:

Text

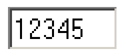
Paragraph

Date



List

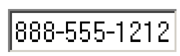
Numeric



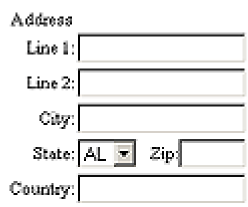
Money

True / False

Phone



Address



c. “Merge Code” - This code will be associated with your new field and can be used in E-mail Templates that you send out as part of an automated campaign. The system will automatically name your merge code but you can rename it as you like. Just remember that a merge code must have no spaces and must also be enclosed between two # characters (i. e. #firstname#).

5. Click on the “Next” button.

6. Depending on what type of field you are creating, you will be asked to specify information such as how many characters you want to allow, the minimum and maximum amount of money you will accept in a field, or what items you want to include in a list.

7. Click on “Done” when you are finished.

Your new field will appear in the main screen in greet text below the standard fields. If you want to change an existing field, either click on the field name or click on the box next to the field name and then click on “ Edit” button at the top of the main screen. Follow the steps above to make your changes.

To Delete a Field

1. Click on the ☐ next to the field(s) you want to delete.

2. Click on "Delete" at the top of the main screen. You will be prompted with an alert that says, "Are you sure you want to delete these fields?"

3. Click on "OK."

Your field(s) will be deleted.

<u>Custom Forms - What is a “form”?</u>

ClarifyOffice allows you to create two types of forms:

- **Contact Forms** - These forms will appear on Contact records within your Contact Manager. Each form will have a tab at the top that you will click on to view its contents.

You can display any standard or custom fields on these forms.

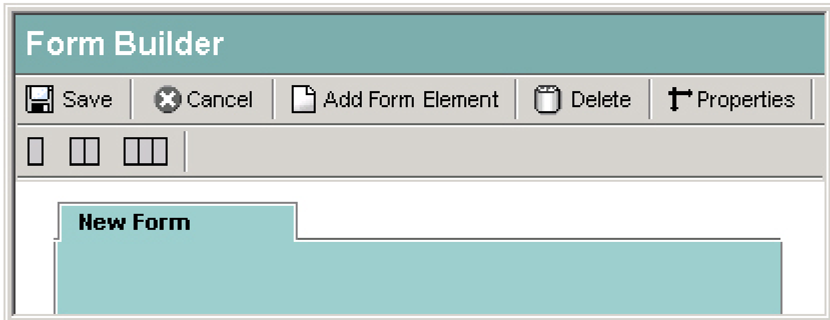
- **Web Forms** - These are forms that you can post on any website. An example of a Web Form would be a “Contact Us” form on a website. You can build a Web Form using any standard or custom fields. When a site visitor submits a Web Form, all of the information will be imported to your Contact Manager automatically.

  This is a great way to gather information about your prospects and customers. You can build custom survey forms, opt-ins for free newsletters, or just about any kind of form you like! You can use the information submitted from these forms to query your Contact Manager database for better target marketing, send automated responses, or simply to send out updates about new products and special features that will interests your customers!

To create a Contact Form:

1. Click on the “Contacts” tab.
2. In the Selection Menu to the left of the main screen, click on “Fields and Forms”
3. The main screen will display a window titled “Form Properties.”
4. Click on “Forms” in the Selection Menu.

5. In the main screen, click on "New Form" at the top of the main screen. A new window titled "Form Builder" will appear:



6. Click on the "Properties" icon at the top of the Form Builder window. A New window titled "Form Properties" will open.

The "Form Properties" window will ask you to complete important information about your form.

There are eight fields for you to complete.

1. **Form Name** - The name of the form as it will be displayed in your Web Form Manager.

2. **Form Type** - Choose "Contact Form."

3. **Redirect URL** - After the form is submitted, your site visitors should be directed to a website page. It may be the page where they just filled out the form, the home page of your website, or another website. Enter the entire URL (including the "http://) of the page where you want to direct your site visitors.

4. **Response Text** - After submitting the form, an alert box will appear with an "OK" button. You can display any text (e.g. "Your form has been submitted. We will get back to you as soon as possible!") on this alert box. Simply type the text in the box adjacent to "Response Text."

5. **Form Status** - Select whether you want this form to be "Active" or "Inactive." (Generally you will only want the form to be inactive while you are building it.) Inactive Contact Forms will not be displayed in any Contact Record.

6. **Notification From Address** - If you are building a Web Form, you can be notified whenever the form has been submitted. This way you will always know about new activity on your website. In this section, choose the e-mail address that you want the notification to be sent <u>from</u>. (If you have only one e-mail address in your ClarifyOffice, your address will be displayed in this box and you will obviously not have a selection from which to choose.)

7. **Notification To Address** - Enter the e-mail address where you want to be notified. Generally, this will be one of your ClarifyOffice e-mail addresses.

   Great Idea! – You can set a Rule that will make e-mail notifications of new activity on your Web Forms appear in different colors! If you have several forms, this is a great way to keep track of what forms are getting the most activity!

8. **Folders** - Choose a folder to apply your form to.

   - If you are creating a Web Form, you will want to specify a single folder where you will import data from your form.

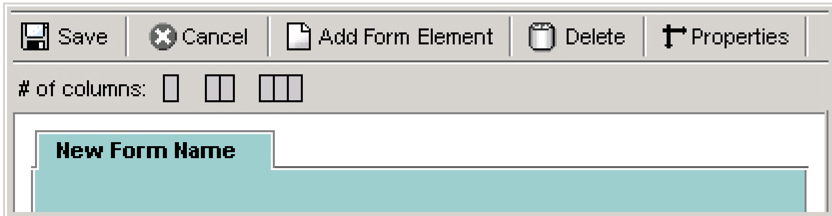
   - If you are creating a Contact Form and you apply the form to an individual folder, you should be aware that if you move a Contact Record out of the specified folder, the Contact Form will not be displayed on the Contact Record.

Important! - This is a good place to explain a fundamental concept regarding custom fields and forms. If you create a custom field and then place that field on any type of form, the information that is stored in that field is stored in the ClarifyOffice database regardless of whether or not you are displaying the field in a Contact Form.

For example, let's say that you create a custom field called "Birthday" and you have a Contact Record for a client where the "Birthday" information has been entered. Now, let's say that your custom form has the properties set so that the form is only displayed in a single folder. If you move the record to another folder, the custom form will not be displayed but this does not mean that the information has been lost. If you move the record back into the folder with which the custom form is associated, you will see all the information correctly displayed.

It is also important to note that if you have a ClarifyOffice product that allows for custom fields and forms and you downgrade to a product that does not, if you later upgrade to the original package, all data that you had stored in these custom fields will still be present on your account.

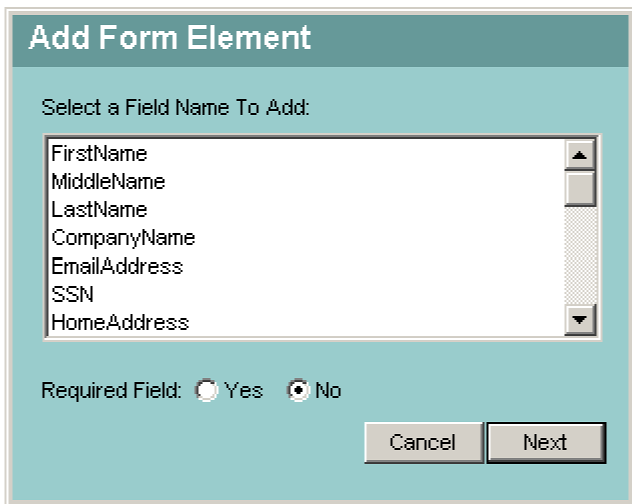
Once you have this information in place, click on the "Save" button. You will see the new name of your form in the Form window:



Adding Form Elements

A "Form Element" is essentially a field that you can add to your form. Here's how:

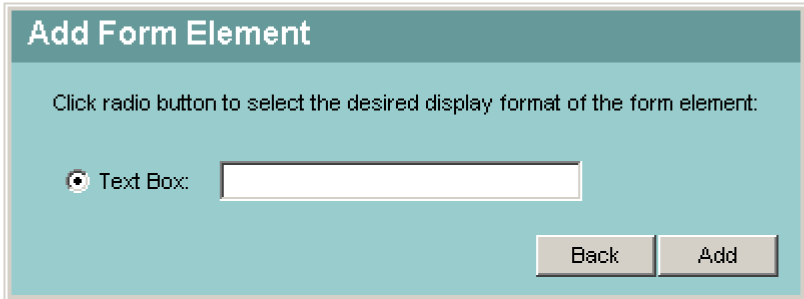
1. Click on " Add Form Element." A new window titled "Add Form Element" will appear.



2. Click on the name of the field ("form element") that you want to add.

   a. **Required Field:** If the field that you are adding will be required, choose "Yes" and the form will include code that will validate that the person completing the form has placed information in this field.

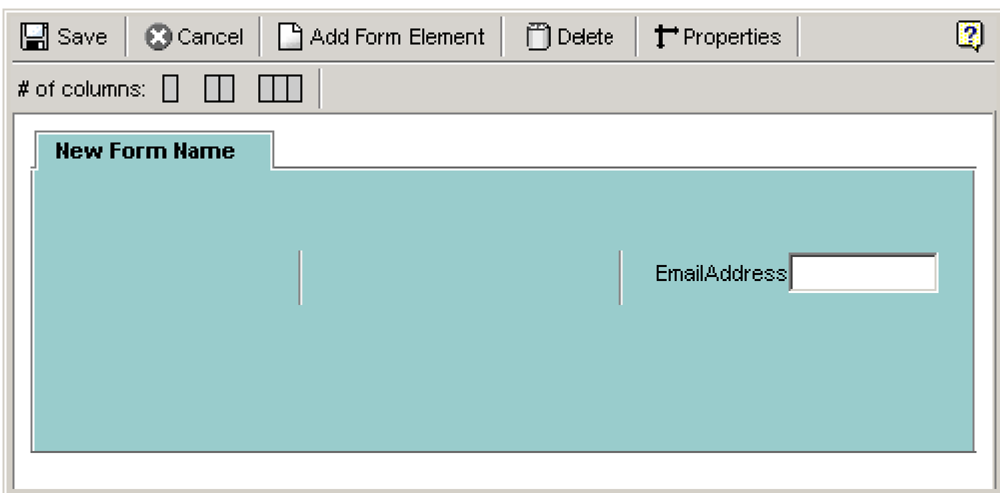
3. Click on the “Next” button.



4. Some form element types allow you to choose from a variety of options. For example, when you add a “list”, this window will allow you to choose to display your list as a drop-down menu, a series of radio buttons, or a series of check boxes. In this example, there is only one option.

   Simply click on the “Add” button.

5. The “EmailAddress” element will appear on the right side of your form.



6. Repeat the steps above to add any elements that you want.

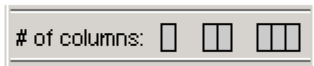
Note: If you are creating a Web Form and the form has any custom fields, you will need to create a Contact Form that will display the custom fields. This Contact Form will not need to include standard fields (such as “EmailAddress”) as the standard fields are already displaying in the Contact Record.

Moving Form Elements

In order to move a form element, simply click and drag the element to the position where you want it placed.

Changing the Number of Columns on Your Form

By default, your form will be displayed in three columns. You can display the form in 1, 2, or 3 columns simply by clicking on the appropriate image next to "# of columns" at the top of the window:



Deleting Form Elements

To delete one or more form elements:

1. Click on the "Delete" button at the top of the window. A new window will appear and display a list of all of the fields that are on your form.

2. Select the element(s) that you want to delete.

3. Click on the "Delete" button.

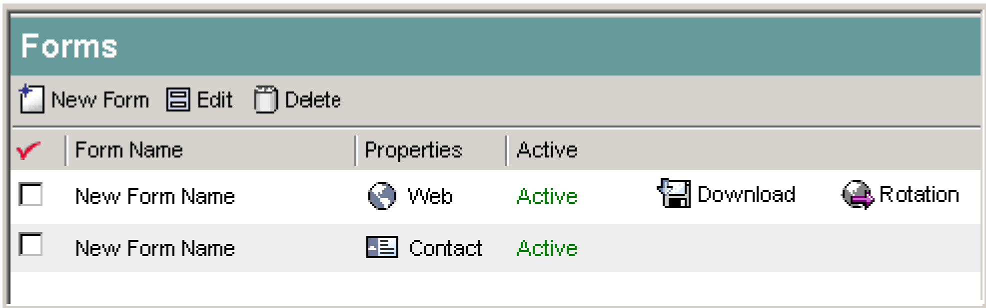
The elements will be removed from your form.

SAVE YOUR FORM!

When you are finished making or modifying your form, be sure to save it. DO NOT CLICK ON THE ☒ AT THE TOP OF THE WINDOW!

The Main Screen

After you have created your forms, the main screen will look something like this:



A few things to note:

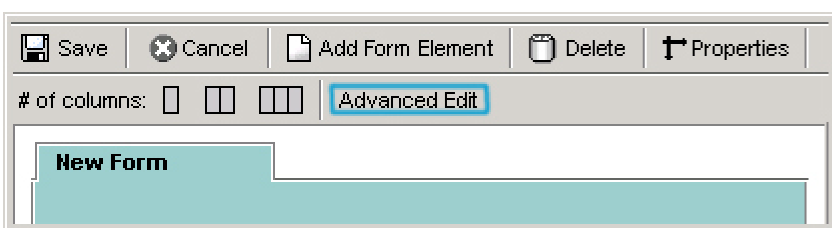
1. If you click on the “Form Name”, the “Form Builder” window will appear. Or, you can click on the check-box next to the form that you want to edit and then click on the “Edit” button.

2. The “Properties” column will identify whether the form is a Contact Form or Web Form. You can click on the words “Web” or “Contact” and bring up the “Properties” window for that form.

3. You can download Web Forms to your personal computer and use the code from the form to post it on a web page. Simply click on the “ Download” button and save the file to your computer.

Advanced Edit Mode

After you have saved your form, you can edit it at any time. You will notice that when you edit a form there is a new button called “Advanced Edit” in the Edit Form window:



The primary purpose of this feature is to allow power-users to modify Contact Forms however they see fit. This mode allows you to change the font style on the form, add links, insert frames that display other websites, or just about anything that you want. Using this feature requires that you have at least a basic knowledge of HTML and Javascript.

There are some important things to note about the “Advanced Edit” mode:

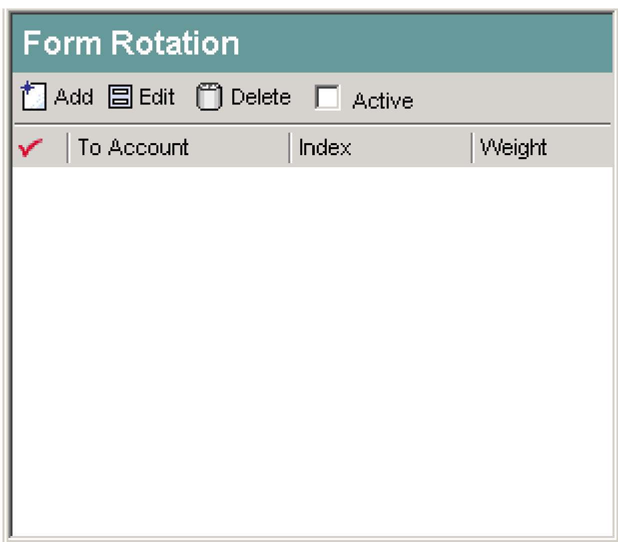
1. There is no code validation when you save the form so you must be extremely careful to test any changes you make thoroughly.

2. If at any time you choose to return to the “Basic Edit” mode, all changes that have been made in the “Advanced Edit” mode will be lost. This is a good way to start all over should you make a major blunder. For example, if you delete the entire code in the “Advanced Edit” more and then save the form, you can open the form and go back to the “Basic Edit” mode and save it to re-populate the Contact Form with the original fields. You can then go back into the “Advanced Edit” mode and see the code that supports the “Basic Edit” mode and try your modifications again.

Rotation

The Form Rotation feature allows you to automatically distribute information that site visitors provide through your Web Form to other people who have a ClarifyOffice product. For example, you might have “Contact Us” form that you have built with the Form Builder and posted on a website. You may want all of the leads generated from that form to be distributed to members of your sales team. The Form Rotation feature allows you to do this as long as all of your team members also have a ClarifyOffice product. Here’s how:

1. Click on “Rotation.” A new window titled “Form Rotation” will appear:



2. Click on the “ Add” button. A new window titled “Add/Edit Participants” will appear:

3. Complete the three fields in the “Add/Edit Participants” window:

    a. **BC Username** - Enter the ClarifyOffice Login Username of any person who will participate in the form rotation.

    b. **Index** - Indicate where in the rotation you want to place this person.

    c. **Weight** - Enter number indicating how many contacts you want this user to receive. For example, if you have four people participating in your form rotation and you want three to receive an equal amount of contacts while the remaining one member receives 70% of the contacts, use a factor of 10 to set the weights as in the example below:

        - 1st Participant = 1
        - 2nd Participant = 1
        - 3rd Participant = 1
        - 4th Participant = 7

    In most instances, all participants will have an equal “weight,” in which case you should simply leave the weight for each participant to 1.

4. Click on the “Submit” button in the “Add/Edit Participants” window. The person who you just added will appear in the “Form Rotation” window.

5. Repeat the steps above to add other participants to the Form Rotation.

6. Once you are finished adding participants to your Form Rotation and you want to make the Form Rotation active, simply click on the check box next to “Active” at the top of the Form Rotation window. The system will automatically set the status as “Active.”

7. Click on the in the upper right-hand corner of the window to close it.

It is important to note that once this feature is active, you will only see the contacts from the form that is being rotated to you.

Conclusion of Advanced Course 2

The Form Builder is a huge asset to your data capture and management strategy and could easily help you handle more sales with less effort.

Please note that the form builder is **not** designed to transfer secure information such as credit cards or bank routing numbers unless the form is posted on a secure site. The ClarifyOffice Web Builder **is** housed on a secure server so if you post a form on any page of a Web Builder site, the transfer of information from that form you your ClarifyOffice will be secure.