Inxmail ❯

Implementing a multi-stage event process
Smart Guide

This Smart Guide shows you how to implement a complex, multi-stage event process. Once it has been set up, the process is completely automated. You require a list to which your recipients can subscribe (Webinar).

Preparation: Add the following columns to the list: Webinar date (type: *Date only*), Email, Salutation, First name and Surname (type: *Text*).

Create subscription form

1. Open the ⚙ *(Global settings)* and the ☁ *Files & web pages* agent.

2. Click the *Web pages* tab and then click 🗋 *(Create new web page)*. Enter a name and select the *Subscription (standard)* template.

3. In the *Settings* element, specify the *Form name* (for example, Webinar Subscription).

4. Open the *Form* element. The *Email* column is already specified. Change the setting here to *Mandatory field* [1, 2].

5. In the *Subscription* element, specify the *Name* (Webinar list) and *List* (for example, Webinar). *Hidden (preselected)*. If necessary, select the desired *Tracking Permission* type.

6. Salutation: In the *Form* element, click ➕ *(Add element)* and add a *Selection list* by clicking *Add and Close*. Repeat the process for the webinar date.

7. First name: In the Form element, click ➕ *(Add element)*. Add the *Text field* element. Repeat the process for the surname [3].

8. Apply the values/settings as shown in the following screenshot [4]:

[1] FIELD VALUE SETTINGS

Default field values can be defined as follows:

› *Editable*
   (Can be completed).

› *Mandatory field*
   (Must be completed).

› *Inactive*
   (Non-editable and invisible)

[2] ADJUST STYLE

Predefined layout settings (CSS stylesheet) and interface texts (buttons and system messages) can be edited in the Style main element. If necessary, assign a CSS class to the form fields.

[3] ARRANGE ELEMENTS

Click an element and use the blue arrow icons ↑ *(Move element up)* and ↓ *(One element down)* to change how the elements are arranged.

[4] VALUES DROP-DOWN LIST

Note the input format of the drop-down list: Enter the values that can be selected using the format "internal value;displayed name\n" line by line. Example: "f;Frau\n". The user sees 'Frau' on the website and 'f' will be saved in Inxmail.

Integrate subscription form into website

Integrate the form into a web page using 'Dynamic entry' [5]. You need a container web page for this. The page must contain the Inxmail `[$include(content)]` command.

1. In the *Settings* main element, add the *Dynamic entry* element. Enter the URL of the container web page including the character set encoding (for example, see http://download.inxmail.de/training/).

2. Click 💾 *(Save)*.

3. Click *Yes* to confirm the following dialog. Specify the *File name* and *Directory* and click *OK*.

4. Click 🖥 *(View web browser preview)* to open and test the form.

Create a confirmation mailing using an action mailing [6]

The confirmation mailing is sent to the participant directly after subscription using the subscription form.

1. Switch to the 'Webinar' event list, click the ✉ *Mailings* agent and open the *Trigger mailings* tab.

2. Click 🗋 *(Create new trigger mailing)*.

3. Enter a descriptive name in the dialog box ('Subscription Confirmation Webinar').

4. Select *Action mailing* as the type.

5. Specify the mailing format required, and, if necessary, a template.

6. Click *Next* and confirm with *Finish*.

7. Enter a text in the Inxmail ✏ *Editing* workflow step workflow step. Then check the mailing and approve it for sending [7].

Setting up actions

Define an action (Subscription of a recipient) that triggers the sending of the action mailing that has just been set up.

1. Open the ⚙ *(Global settings)* and the ▷ *Actions* agent.

2. Select 🗋 *(Create new action sequence)*.

3. Enter a descriptive name ('Webinar Subscription').

4. Click *OK*.

5. Select *Subscription of recipient* as the event in the action sequence workflow in the ⟳ *Event* workflow step and select the event list (Webinar) under *Result relates to list:*.

6. Click 💾 *(Save)*. In the action sequence workflow in the ▷ *Actions* workflow step, click ➕ *(Add new action)*.

7. Select the *Send action mailing* action.

8. Click *Add + Close*.
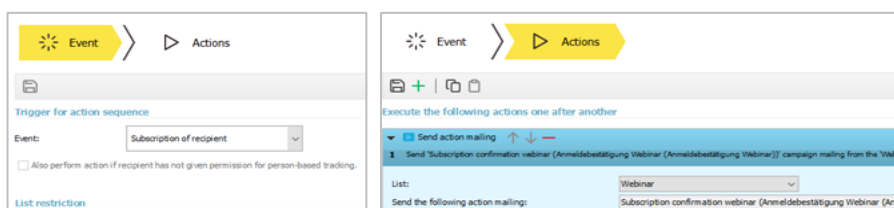
9. Select the event list (Webinar) and click … to select the previously approved action mailing.

10. Click 💾 *(Save)*.

Setting up a reminder mailing

The reminder mailing is to be automatically sent to the participants one day before the webinar.

1. Switch to the 'Webinar' event list, click the ✉ *Mailings* agent and open the *Trigger mailings* tab.

2. Click 🗋 *(Create new trigger mailing)*.

3. Enter a descriptive name in the dialog box ('Webinar Reminder').

4. Select *Reminder mailing* as the type.

5. Specify the mailing format required, and, if necessary, a template.

6. Click *Next*.

7. Select the recipient table column with the webinar date ('Webinar Date').

8. Set *The appointment is in 1 day*.

9. Specify 10:00 as the *Sending time*. If necessary, the sending period can be restricted.

10. Click *Finish* [8].

11. Enter a text in the ✏ *Editing* workflow step. Then check the mailing and approve it for sending [7].

12. Specify to whom you wish to send the mailing in the 👥 *Recipients* workflow step [8].

13. It is possible to edit the predefined sending time and sending period in the ◁ *Dispatch* workflow step.

14. Click ✅ *Activate dispatch*. Confirm the prompts.

15. The mailing is first sent as of the defined date [10].

Setting up a thank-you mailing

The thank-you mailing is to be automatically sent to the webinar participants two days after the webinar [11].

1. Switch to the 'Webinar' event list, click the ✉ *Mailings* agent and open the *Trigger mailings* tab.

2. Click 🗋 *(Create new trigger mailing)*.

3. Enter a descriptive name in the dialog box ('Webinar Thank-you Mailing').

4. Select *Follow-up mailing* as the type.

5. Specify the mailing format required, and, if necessary, a template.

6. Click *Next*.

7. Select the recipient table column with the webinar date ('Webinar Date').

8. Set *The appointment was 2 days ago*.

9. Specify 10:00 as the *Sending time*.

10. Click *Finish*.

11. Enter a text in the ✎ *Editing* workflow step. Activate the mailing as described in the 'Setting up a reminder mailing' section.

Start campaign

If a customer opens the subscription form and registers for the event, he receives the other trigger emails automatically [12].