

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]

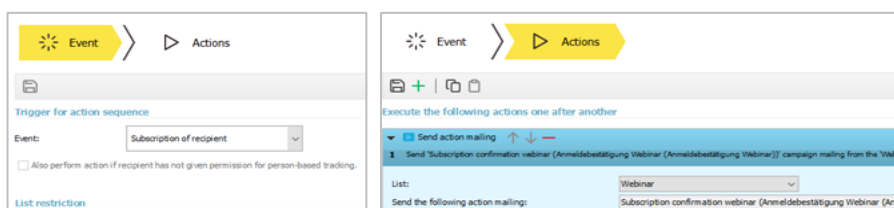
The confirmation mailing is sent to the participant directly after subscription using the subscription form.


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).

[5] IFRAME AND DYNAMIC ENTRY


'Dynamic entry' is recommended for static web pages. For performance reasons, the complete web page is cached for one hour, cleared and then cached again.

In the case of dynamic web pages, hourly updating may be too infrequent. We therefore recommend the use of IFrame here.

[6] CONFIRMATION VIA THE SUBSCRIPTIONS AGENT

You have the option of creating the confirmation mailing in the  *Subscriptions* agent. Adapt the template of the welcome mailing in the *Subscribe/unsubscribe mailings* tab or create and approve a new mailing of the same type.

Enable the *Send welcome mailing* option in the *Subscription* tab and select the mailing you have just created.

Click  (Save) to apply the settings.







Confirmation mailings that are already being used can no longer be deactivated or modified. Therefore, duplicate the mailing by copying and pasting. Then edit the copy and use later in place of the original mailing.

[7] PREVIEW WITH RECIPIENTS

Recipients must be present in the list or test profiles must be created to ensure the mailing preview or check works.



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].


[8] CHANGE TRIGGER RETROACTIVELY

You can make changes to the trigger (recipient definition and sending definitions) at any time. To do so, stop the sending of the mailing.

You can now make your changes in the  *Recipients* workflow step and  *Dispatch* workflow step. Afterwards, reactivate the sending of the mailing.

If you would like to make changes to the mailing content, then create a new mailing or copy the existing one. Then activate this mailing and deactivate the sending of the previous mailing.

[9] RECIPIENT SETTINGS




The previously defined settings appear in the  *Recipients* workflow step and can be changed once more or restricted by the existing target group.

[10] REPORTS

You can view reports on the mailing in the  *Analysis* workflow step or by going to the *Reports*  tab,  *Mailing reports* navigation item, *Reports on trigger mailings* category.

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].

[11] EXTEND THANK-YOU MAILING

You can extend your thank-you mailing with a survey or a calendar item, for example.

By conducting a survey on a topic of your choice, you can find out more about the interests of your recipients. At the same time, you can enrich your reader profile data and define target groups more precisely.

To enable training participants to add the training to their personal appointment calendar, you can prepare an appropriate calendar item and store it directly in the registration confirmation.

You must generate the calendar item beforehand in a separate program. This item is not generated automatically by *Inxmail Professional*. You can do this using any of the common appointment scheduler programs (Microsoft Outlook, Apple iCal and CAS genesisWorld).

[12] TEST PROCESS

Before activating the campaign, test the entire process with your own recipient. This way, you can see whether the campaign works as it should.