Marketing Manager New Release v7.0

Enhanced Search in Prospects Report

Menu Path: Dashboard Dropdown → Visitors & Prospects → 'Prospects Report'.

• Now you can seamlessly search for your prospects based on:



Company Name Search:



Location Search:

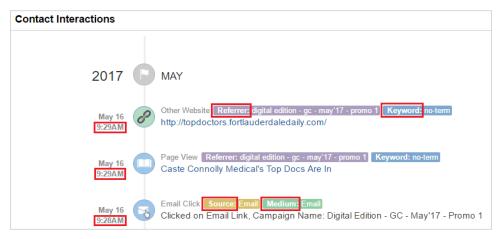


Email Search:



Enhanced Interactions

• Now you will find more information like Referrer, Keyword, Source, Medium & Time for all the 'Contact Interactions' and 'Recent Interactions' of the visitors.





Note: If a visitor visits the website by typing the website address directly in the browser, Referrer/keyword will not be displayed.

Location details in Leads Report

Menu Path: Dashboard Dropdown \rightarrow Leads \rightarrow 'Leads Report'.

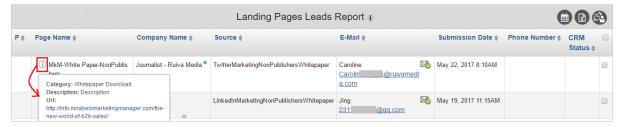
• 'Leads Report' has been enhanced with the 'Location' field.



New Landing Page Info Icon

Menu Path: Dashboard Dropdown \rightarrow Leads \rightarrow 'Landing Pages Leads Report'.

• The info icon will display the Category, Description & the actual landing page URL.



MailChimp A/B Campaign Integration

Now you can integrate MailChimp A/B campaigns with Marketing Manager.



New LinkedIn UI - Browser Extension Upgrade

• Marketing Manager Browser Extension has been upgraded to perform 'Copy to CRM' from new LinkedIn UI.

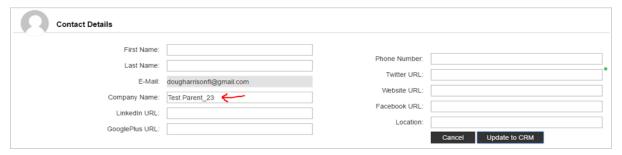
HubSpot Forms integration

HubSpot forms can be integrated with Marketing Manager for more insights about Visitors and Prospects. Reach
out to our software consultant for the integration.

Copy to CRM Enhancements

Contact Details – Company Name Update

• If we modify the 'Company Name' & click 'Update to CRM', Marketing Manager will check if the company is a primary contact & if it has any sub-contacts under it.



 If there are any sub-contacts, below notification will pop-up & updates the 'Company Name' as per your selection.



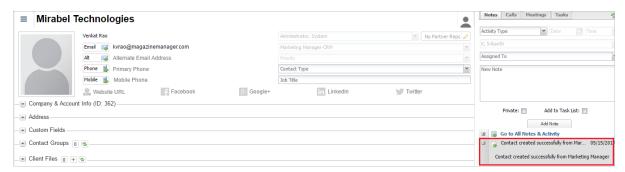
Standard Rep Name & Contact Grouping

- Once a company contact is copied to CRM by a Rep, going forward any other contact from that company is assigned to the same Rep even though the contacts are copied by other reps.
- Any new contact copied to the CRM from a company that is already copied to CRM will be added as a sub-contact to the existing contact.



Activity Type for Copy to CRM/Update to CRM

• Now every time a contact is copied/updated to CRM, a note will be created with default Activity Type 'Marketing Manager-CRM' to distinguish the contacts copied from Marketing Manager with the contacts created directly in the CRM using the 'Add Contact' option.



Category for Copy to CRM/Update to CRM

 When you perform 'Copy to CRM' or 'Update to CRM' on a contact, the default category will be 'Marketing Manager-CRM'. If the category on the primary contact is modified later, modification will be applied to all the sub-contacts.



No duplication of Marketing Manager Contacts in CRM

• Multiple records in the CRM for the same contact copied from Marketing Manager with different category types and updates is no longer allowed to avoid duplication. Now a contact in Marketing Manager can be copied only once to CRM based on the Email ID. If there is an update, existing record will be updated.