

Marketing Manager New Release v9.2

Convert Contact as a Customer

You can convert Contacts as customers by clicking on the Email ID of the contacts in any of the Marketing Manager reports and even from the 'Business Intelligence' profile after copying the BI contacts to CRM.

- From any of the Marketing Manager reports (or) from Company Profile, click on the Email ID links.

P	Company Name	E-Mail	Page Views	All Time Visits	Visiting From	Visit Date	Location	Social Media	CRM
	Mirabel Technologies Inc	Nathan cenovski ncenovski@mirabeltechnologies.com	1	54	No Referrer	Nov 20, 2017 1:59PM	Fort Lauderdale, United States, 33301		

- Click on 'Convert' button under Contact Details.

Contact Details

First Name:

Last Name:

E-Mail:

Company Name:

LinkedIn URL:

GooglePlus URL:

Originating Source : Website | Referrer Name : app.mirabelsmarketingmanager.com

Phone Number:

Twitter URL:

Website URL:

Facebook URL:

Location:

- Conversion pop-up screen shows the relevant contacts from both Marketing Manager & CRM. Select the required contacts to be merged & click on 'Convert'.

Company Conversion: Mirabel Technologies Inc

Contact Conversion: ncenovski@mirabeltechnologies.com

Converted Date:

Relevant companies in CRM:

Note/Comment:

Select contacts to be merged under this company

Marketing Manager	CRM
<input type="checkbox"/> abalch@magazinemanager.com	<input type="checkbox"/> bpooyia@magazinemanager.com
<input checked="" type="checkbox"/> abalch@mirabeltechnologies.com	<input checked="" type="checkbox"/> ccalahan@mirabeltechnologies.com
<input type="checkbox"/> anaresh@magazinemanager.com	<input checked="" type="checkbox"/> ESayward@mirabeltechnologies.com
<input type="checkbox"/> Andy@magazinemanager.com	<input checked="" type="checkbox"/> iriley@mirabeltechnologies.com

- You can search in 'Relevant companies in CRM' field, if you would like to merge the contacts of any relevant company available in Marketing Manager CRM.

Company Conversion : Mirabel Technologies Inc
Contact Conversion :ncenovski@mirabeltechnologies.com

Converted Date 11/30/2017

Relevant companies in CRM Mir

Note/Comment: Mirabel Technologies / The Magazine Manager
 Mirabel Technologies Inc
 Mirabel Technologies

Select contacts to be

- Marketing Manager
- abalch@mirabeltechnologies.com
- ccalahan@mirabeltechnologies.com

- Conversion activity is recorded with time stamp under 'Contact Interactions'.

Contact Interactions

2017 NOVEMBER

Nov 14 8:37AM

Converted to Customer
 Contact : jean@...com | Company : Corridor Business Journal | Converted by pb1

Interaction with time stamp

Sales Rep

- You can revoke the conversion by clicking the 'Revoke' button.

Conversion Details Revoke

Converted Date: Nov 14, 2017 Contact: jean@...com

- You can find the converted customers in the 'Customers Report'. Go to 'Dashboard' dropdown → Campaigns → 'Customers Report'.

Convert Company as a Customer

You can now convert a Company as a Customer from Prospects Report.

Go Back to Dashboard Prospects Report

P	Company Name	E-Mail	Pages Seen	Visitors	Leads	Visiting From	Last Seen	Location
	Ha...ms handels...ellschaft M.B.H	0	1	1	0	No Referrer	Dec 4, 2017 7:59AM	Graz, Austria, 8074
	The Magazine Manager	1	19	1	0	No Referrer	Dec 4, 2017 2:55AM	Munich, Germany, 80331
	Trans... Ltd.	0	1	1	0	Google	Dec 3, 2017 1:42PM	Hamilton, Bermuda, HM 11

- Click on the Company Name → In 'Summary' tab, click on 'Convert' button.

Summary Graz, Austria, 8074

First Seen Dec 04, 2017	Page Views 1	Visitors 1
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Search Phrases

Searched Keyword	Search Engine	Date
No Search Phrases Found..		

Convert

- If the prospect company has no records in CRM, you need to provide the Email ID & click on 'Convert' button. This will create a CRM record & establishes the relation between CRM record & Company in Prospects Report.

Company Conversion : Ha ms handels ellschaft m.b.H

Converted Date: 12/04/2017

Relevant companies in CRM: Ha ms handels ellschaft m.b.H

Email: **Mandatory** *

Note/Comment:

Select contacts to be merged under this company

Marketing Manager CRM

Convert **Cancel**

- If Company contacts already exist in the CRM (or) Marketing Manager, select the required contacts to be merged under the Company & click on 'Convert' button.

Company Conversion : The Magazine Manager

Converted Date: 12/04/2017

Relevant companies in CRM: The Magazine Manager

Note/Comment:

Select contacts to be merged under this company

Marketing Manager CRM

58@.com

mani.sik@.com

tully@.com

dennis1@.com

rkoomera@magazinemanager.com

Convert **Cancel**

Great insights with new 'Customers Report'

Menu Path: Go to Dashboard dropdown → Campaigns tab → 'Customers Report'.

Company Name	Number of Page Views	Total Submissions	E-mail Clicks	Aging	Converted Date	Originating Source	Purchased Trigger
Miss Life Inc Miss Life Inc 16 Contacts	30	6	24	1y 11m 11d	Sep 25 2017 12:00AM	Email	Form Submission
Pin Media Pin Media 12 Contacts	5	2	3	2 m 17 d	Sep 25 2017 12:00AM	Email	Form Submission
EXHIBITOR EXHIBITOR 9 Contacts	12	2	16	2y 4m 13d	Oct 13 2017 12:00AM	Organic Search	Form Submission

Get below insights about each converted customer:

- Number of contacts involved in the process.
- Website interactions (Page Views, Submissions, Email Clicks) of each contact.
- Time taken for conversion.
- Originating Source - Source that led to customer's first interaction.
- Purchased Trigger - Latest marketing effort that led to conversion.
- Click on the Company Name for 'Conversion Details' & 'Company Interactions'.

Customers Report | Sep 20, 2017 - Nov 14, 2017

[Go Back To customer Report](#)

Conversion Details

Converted Date: Nov 07, 2017
 CRM Company: Texas Deer Association
 Contacts selected to merge under this company: grayson@texasdeerassociation.com, cec@texasdeerassociation.com, madison@texasdeerassociation.com
 Contact: grayson@texasdeerassociation.com
 Note/Comment: Converted on 2017-11-07 1:11:20

Company Interactions

Interactions of all people participated in conversion

2017 NOVEMBER

Nov 7 12:00AM
 grayson@texasdeerassociation.com
 Converted to Customer
 Contact: grayson@texasdeerassociation.com | Company: Texas Deer Association |
 Converted by administrator

2017 SEPTEMBER

Sep 19 1:32PM
 grayson@texasdeerassociation.com
 Email Opened, Campaign Name: MM Demo Request/Phone Chat

Revoke

- 'Company Interactions' will show the CRM activities (Notes, Call, Meetings etc.) of all the merged contacts of the selected company.

Contacts selected to merge under this company:

anaresh@magazinemanager.com, bpooyja@magazinemanager.com, cmanfoolh@magazinemanager.com, cmionica@magazinemanager.com, devuser@magazinemanager.com, divmadesh@magazinemanager.com, kravivcharantej@magazinemanager.com, mohargava@magazinemanager.com, mgurnduboina@magazinemanager.com, mprudhvi@magazinemanager.com, pudaysantosh@magazinemanager.com, rkiran@magazinemanager.com, rksaroj@magazinemanager.com, rraj@magazinemanager.com, rvasu@magazinemanager.com, rshankar@magazinemanager.com, rshankar@magazinemanager.com

Company Interactions

2017 NOVEMBER

Nov 13 1:51PM
 rvasu@magazinemanager.com
 Converted to Customer
 Contact: rvasu@magazinemanager.com | Company: The Magazine Manager |
 Converted by tsupport

2017 OCTOBER

Oct 12 7:10PM
 bpooyja@magazinemanager.com
 Email Clicked, Campaign Name: Pooler list

Oct 12 8:28AM
 bpooyja@magazinemanager.com
 Customer Updated successfully from Marketing Manager

CRM Activity

Insights about Customers from each Source

The counts under 'Customers' in 'Sources Report' shows the number of converted customers for each source.

Source	No of Visits	Leads	Customers
Direct	252	55	1
Google-AdWords	320	32	0
Others	263	18	0
Email	31	6	0
Organic Search	120	2	0
Folio	20	0	0
Social Media	37	0	0
Website	42	0	0

- Click on the counts under 'Customers' to get more insights about each customer in 'Customers Report'.

Source : Direct → Customers Report

[Go Back to Sources Report](#)

Company Name	Number of Page Views	Total Submissions	E-mail Clicks	Aging	Converted Date	Originating Source	Purchased Trigger
qll.in qll.in 1 Contacts	1	0	0	3 m 7 d	Nov 13 2017 2:42PM	Direct	

'Landing Page Leads Report' enhancements

- Now the report shows the 'Originating Source' from which the visitor first landed onto your website.
- Now the report shows the 'Landing Page Source' where the landing page submission happened.
- 'Priority' field has been renamed as 'Quality'.

Landing Pages Leads Report

P	Page Name	Quality	Company Name	Originating Source	Landing Page Source	E-Mail	Submission Date	CRM Status	Delete
	MKM General Link to Free Trial	Select	Banglades	Google-AdWords	Google-AdWords	Molam Ros33@gmail.com	Nov 21, 2017 4:21AM		
	MKM-Website Inquiries	Select	CardConnect - Mirabel Partnership	Website	Website	Davidsau.com	Nov 18, 2017 6:18PM		

- Customer icon is shown in 'Company Name' field if the company is converted to customer. Similarly, Customer icon is shown in 'CRM Status' field if the Contact is converted to customer.

MM-DemoRequest-WatchVideos	Select	SLOIA	Company Converted to Customer	Organic Search	Google-AdWords	Tom Kovich tom@sk.com (805) 552	May 12, 2017 8:28PM	Contact Converted to Customer	
MM-Watrh Videos	Select			Organic Search	Google-AdWords	Donna Silva			

Address updates from CRM

Now the 'Contact Details' page in Marketing Manager will show more address details in the 'Location' field by fetching them from Marketing Manager CRM.

'Contact Details' page in Marketing Manager:

Contact Details

Originating Source : Website | Referrer Name : search.yahoo.com

First Name: Jean
 Last Name: [Redacted]
 E-Mail: jean@business.com
 Company Name: Business Journal
 LinkedIn URL: https://www.linkedin.com/in/jean-970
 GooglePlus URL: [Redacted]

Phone Number: (319) 851-51
 Twitter URL: [Redacted]
 Website URL: http://www.business.com
 Facebook URL: [Redacted]
 Location: 84 Quarry Road Suite 125, Iowa, United States, 522

'Contact Edit' page in Marketing Manager CRM:

Co Business

John
 Email: john@business.com
 Alt: Alternate Email Address
 Phone: 319-885-51 X3
 Mobile: Mobile Phone
 Website URL: [Redacted]
 Facebook: [Redacted]
 Google+: [Redacted]
 LinkedIn: [Redacted]
 Twitter: [Redacted]

Shumate, Dennis
 Category: [Redacted]
 2 Active Client
 Contact Type: [Redacted]

Address: 84 Quarry Road, Suite 125, Coraville, IA, 522 Johnson, USA

Note: If a contact is manually added in Marketing Manager CRM, address change in CRM record will not affect the details in 'Location' field in Marketing Manager.

Confidence score for Email validity

For Email IDs with 'Unknown' validation status in Business Intelligence Profile, Prospecting Dashboard & Browser Extension, Marketing Manager now displays a confidence score.

Business Intelligence:

All	C-Level	VP-Level	Director-Level	Manager-Level	Others	search name ...
Employee title	E-Mail	Phone Number				
Manager-Level						
Senior Human Resources Manager	Nunes al@newport...com	90% confident email is valid ★★★★☆	Hover mouse on stars for confidence %			
Director-Level						
Corporate Director of Operations	Alemany salemany@newport...com	Unknown Email IDs ★★★★☆	Unknown Email IDs			
Manager-Level						
General Manager	Spirlet rspirlet@newport...com	★★★★☆	Unknown Email IDs			
Inn Manager	Perry tperry@newport...com	★★★★☆	Unknown Email IDs			

Prospecting Dashboard:

Director - Level

Gimbol
Director Of Marketing
gimbol@east...com
★★★★★ High Confidence

Manager - Level

Unknown Email IDs

Staff - Level

Algeo Associate Attorney lgeo@east...com ★★★★★ Medium Confidence	Hayman Attorney yman@east...com ★★★★★	Pulli Paralegal And Bookkeeper And Office Administrator ulli@east...com ★★★★★	Kernan Attorney ernan@east...com ★★★★★ Low Confidence
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Browser Extension:

Marketing Manager | Business Intelligence

Home | Dashboard | Logout

East... & Gray...

HQ. Address : Street, Doylestown, Pennsylvania, United States, 18901-...

Employee Size : 36

Revenue : \$10.0M - \$50.0M

Copy to CRM

< Prev Showing 1 - 20 (36) Next >

Select	Name/Email	Designation
	Gimbol gimbol@east...com ★★★★★ High Confidence	Director of Marketing Unknown Email IDs
	Ms. Pulli pulli@east...com ★★★★★ Low Confidence	Paralegal and Bookkeeper and Office Administrator
	Kernan ernan@east...com ★★★★★	Attorney