Marketing Manager New Release v9.2

Convert Contact as a Customer

You can covert 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	
COMPANY PROFILE	Mirabel Technologies Inc	Nathan cenovski ⬇ Click on the Email ID ✉ ncenovski@mirabeltechnologies.com	1	54	No Referrer	Nov 20, 2017 1:59PM	🇺🇸 Fort Lauderdale, United States, 33301		in		☐

- Click on 'Convert' button under Contact Details.

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

- 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.

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

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

- 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.

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

- 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.

- 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.

Great insights with new 'Customers Report'

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

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'.

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

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'.

'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'.

- 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.

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 Edit' page in Marketing Manager CRM:

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:

Prospecting Dashboard:

Browser Extension: