Beginner's Guide to Mautic

OSTraining.com

Table of Contents

Welcome!

Mautic is an open source marketing automation system.

Recent studies indicate that only about 4% of the businesses with 20 or more employees use marketing automation software. Venture Beat reported that 80% of marketing automation users saw their number of leads increase and 77% saw the number of conversions increase as well.

More than 60% of marketers use mass email to stay in touch with customers but only around 13% are using marketing automation software. That's just crazy! Every email, every text, every follow up takes time.

Marketing Automation done right can improve the relationships you have with people by sending them relevant information on a timely basis. It takes the mundane, repeatable tasks off your plate and moves them into a system that works for you. It manages all of your contacts and campaigns in one place. It automates and tracks previously manual tasks like website notifications email text messages and other events.

Marketing automation measures everything so you can see what's contributing to the bottom line and spend less time in spreadsheet of difficult to follow information.

How does it all work?

Let's take this example. Someone comes to your website - they're basically just an IP address. There might be some geographical information another bit of generic information attached to this IP but these visitors remain anonymous.   You need a way of identifying or tracking these anonymous visitors, turning them into potential leads for your business. One of the ways businesses do this is by creating landing pages with a specific call to action. These call to actions may simply be clicking a button to download something or watching a video that requests information to finish it, or something else that encourages people to give you more information.

They're going to enter this information in a form. And now you know more about them.

Typically, the fields on this form would be name, email address and maybe a cell phone, maybe other information about them as a business, you now have a lot more knowledge about this individual, and they're no longer anonymous. You can link the pages they visited to a specific IP address. Now that you have that information like an email address, you can do a variety of tasks. You can look up their social networks based on publicly available information. You can add them to specific lists, you can begin drip flow, marketing, email campaigns. You can send them, SMS text messages or web notifications and so much more.

You can make marketing automation as easy or as complex as needed to fit your business. So don't be overwhelmed. This is pretty exciting stuff.

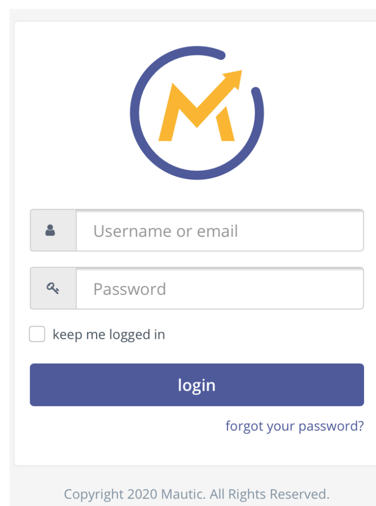
When we look at the idea of marketing automation. We're not talking about de-personalizing relationships with people, we're talking about better defining those personal touches in the communication, you're already doing. And having that done programmatically.

And that's the heart of marketing automation.

Installation

There are several ways to install Mautic. We recommend the "manual" way of doing so and NOT using a 3rd party installer (Softaculous or Bitnami etc.). We also recommend NOT using a shared host for a Mautic installation. A VPS, Cloud server (Digital Ocean) or dedicated server are much better options. You should have command line access.

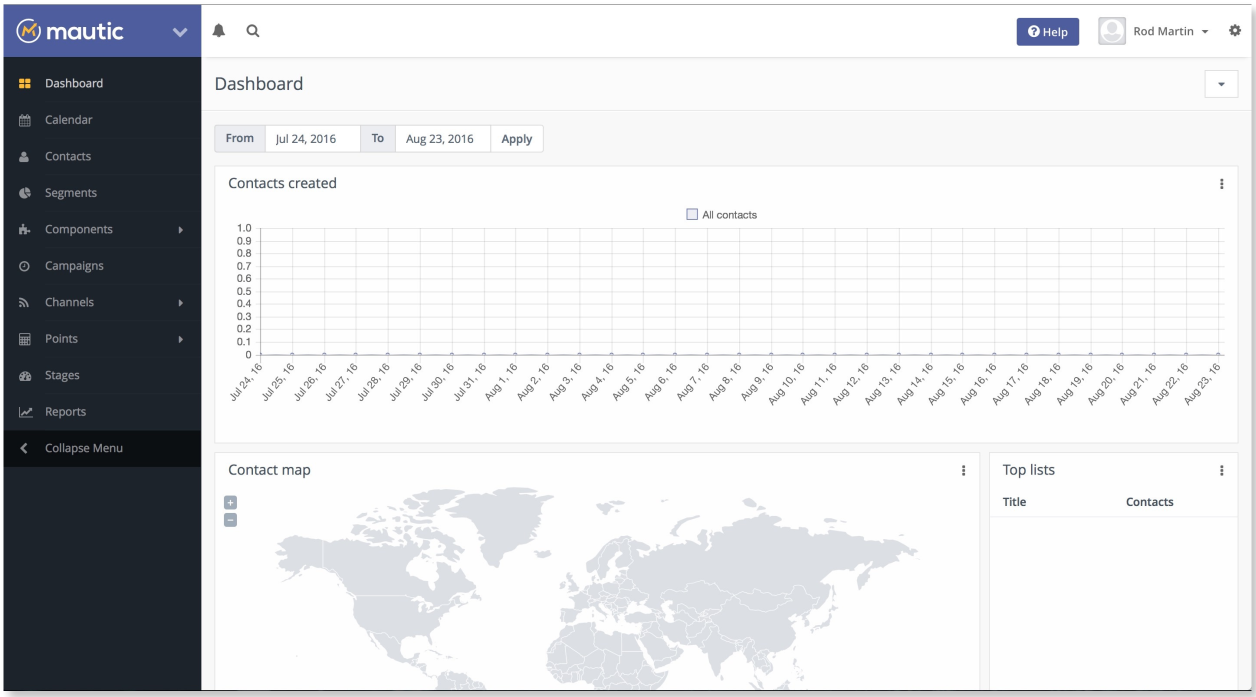
1. Download Mautic from https://www.mautic.org/download.
2. Create a sub-domain or sub-folder on your site (usually a sub-domain is better. Make sure both your website and Mautic sub-domain are covered by an SSL certificate.)
3. Upload Mautic to the designated folder/sub-domain.
4. Create an empty database
5. In your browser, go to the web address where Mautic has been uploaded.
6. Follow the step by step directions - making sure you correct any php issues on the first screen.



Overview & Configuration

1. **Log in.** You would have selected a username and password when you installed Mautic.

The Dashboard



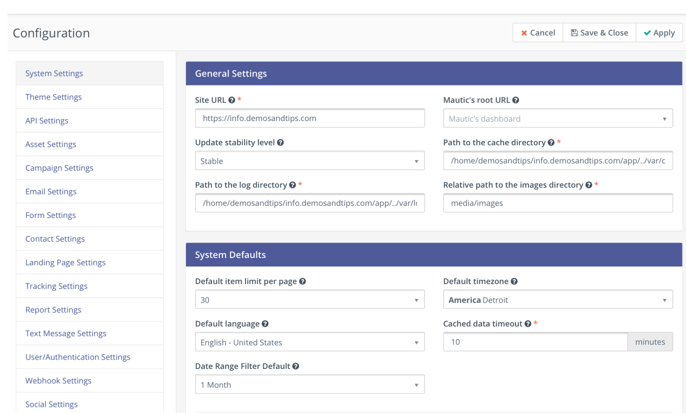
On the left is the **Main Menu**. This is where you'll spend most of your time working in Mautic. The **Dashboard** is your information center. It's flexible and fully customizable so you can view the metrics that are important to you in real-time.

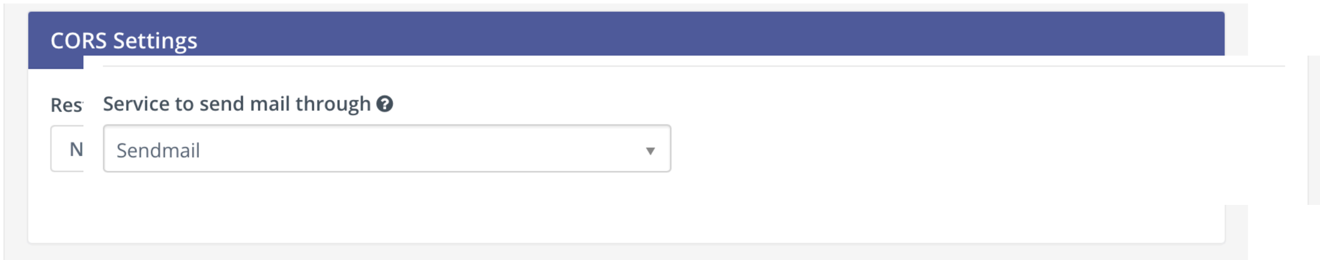
Configuration

1. Click on the **Settings gear** in the top right corner. This is where you'll configure much of Mautic, including any email configuration, time zones, language settings, as well as any integrations you want to use such as a CRM like Salesforce.

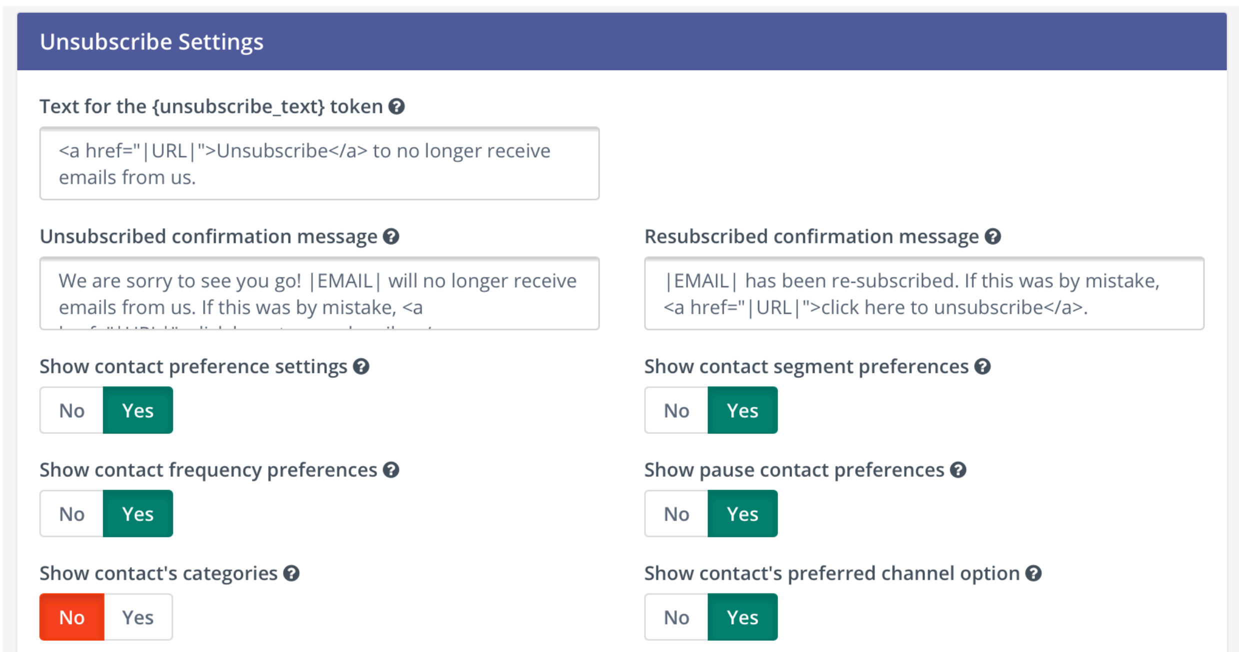
2. Click on **Configuration.** There are **three** main sections you need to configure first: System Settings, Email Settings and Tracking Settings.

3. System Settings: The most important one here is CORS. Enter the web address where you'll be adding the tracking pixel.





4. Click on Email Settings and update how you'll send your emails.
5. Scroll to the bottom and turn on the Preference Center. (You'll set up a landing page and form for that later).



6. Click on Tracking Settings. This is the tracking code you'll insert into your website (or you can install a plugin instead - they are available for most major CMS's).
7. You'll want to explore all the configuration options before you go too far in your Mautic setup.

Mautic tracking settings

Insert following code at the end of the web page before ending </body> tag. Mautic Landing Pages are tracked automatically. Use this only to track 3rd party websites.

```
<script>
    (function(w,d,t,u,n,a,m){w['MauticTrackingObject']=n;
        w[n]=w[n]||function(){(w[n].q=w[n].q||[]).push(arguments)},a=d.createElement(t),
        m=d.getElementsByTagName(t)[0];a.async=1;a.src=u;m.parentNode.insertBefore(a,m)
    })(window,document,'script','https://info.demosandtips.com/mtc.js','mt');

    mt('send', 'pageview');
</script>
```

CRON Jobs

Cron jobs are required for Mautic to run properly. DO NOT SKIP THIS STEP. You can learn how to set up Cron jobs at https://docs.mautic.org/en/setup/cron-jobs.

Click on Contacts in the Main Menu.

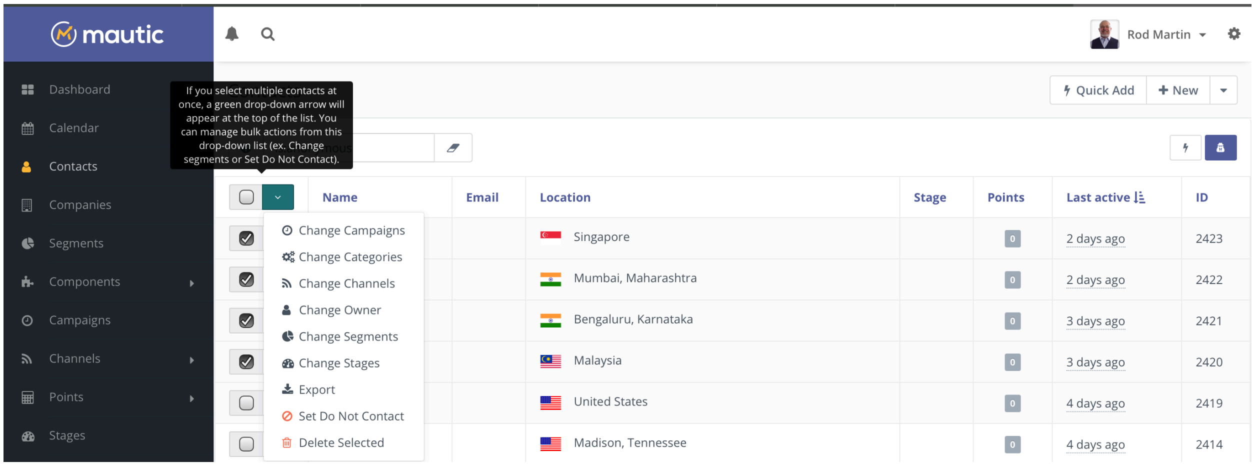
People are either unknown or known **contacts**. Once people are "known" or identified, you can place them into segments. **Segments** are lists of known contacts based on any criteria you choose.

Fields

Before contacts can be added or imported, you must identify the information you want to store in Mautic and add the additional fields in the Configuration area.
Mautic supports all database field types and comes with some pre-configured special fields you can add to your contacts. You can add an unlimited number of fields to contacts in Mautic, however you should add only the fields you need.

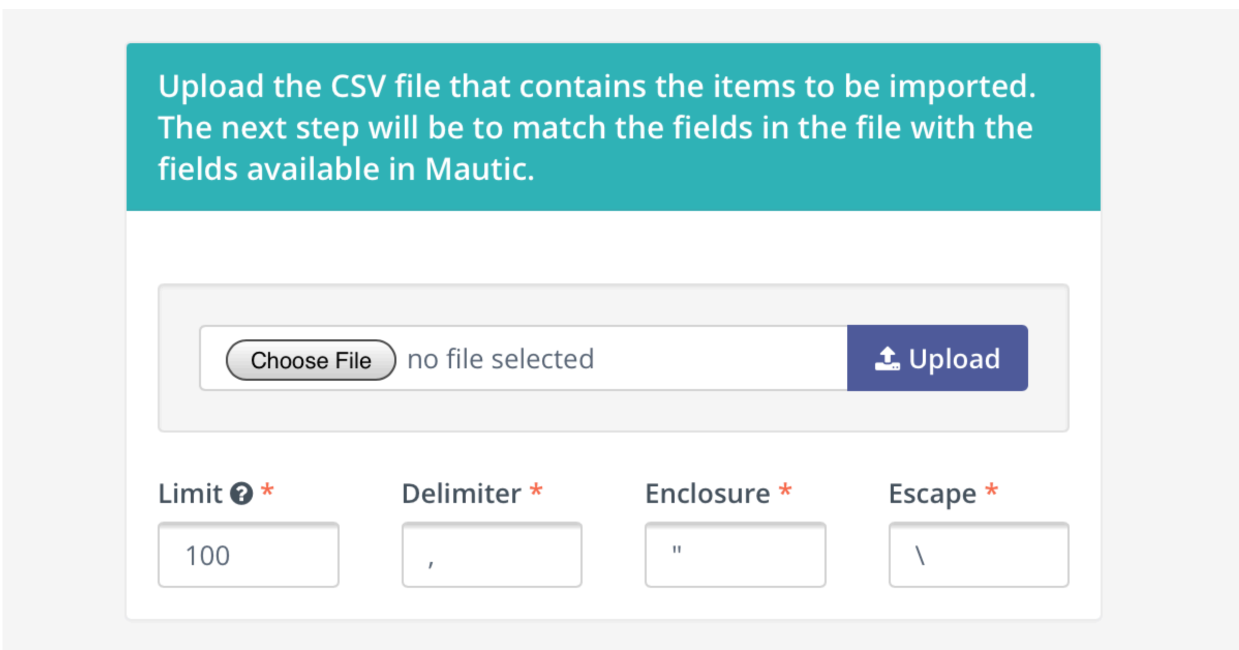
Contacts

Unknown visitors usually enter your system via web page visits where the system captures an IP address (their computer address on the internet) and possibly some company information (depending on the IP lookup software you choose). ***One of your goals of course is to make unknown visitors into known contacts.*** The usual way of doing this is a form of some sort - either on a landing page or as part of your shopping cart etc., however you can import contacts from a database or CRM.



Known Contacts are people who have been identified in Mautic. There are a number of ways people can come into Mautic as known contacts.

- **Import from a database or CSV file.** This is a simple process of matching the fields from your current database to Mautic's fields and clicking import!

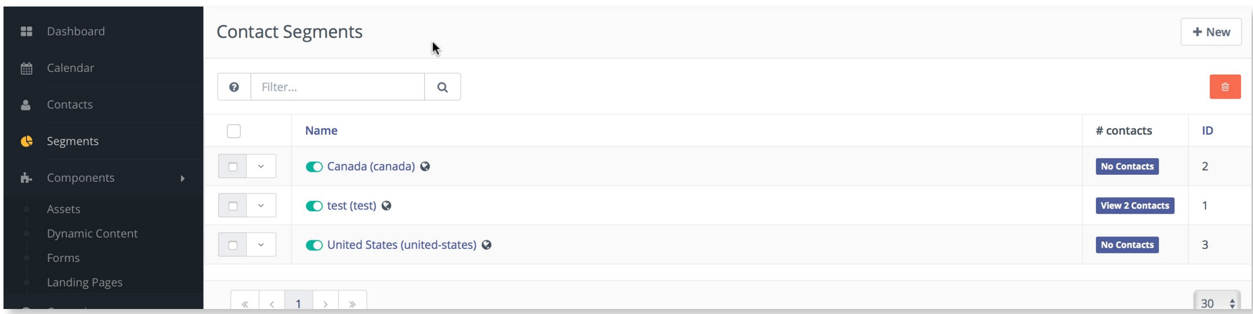


- **Connect your CRM.** Mautic's CRM integrations make this step very simple. Mautic has bi-directional integration with Salesforce, so getting information into Mautic and back to Salesforce is seamless.

- **Implement Forms.** If you're starting from scratch, turning site visitors into known contacts is achieved via **forms**. We'll talk more about that but for now, you should think about the landing pages and forms you'll need to begin collecting information.

Segments

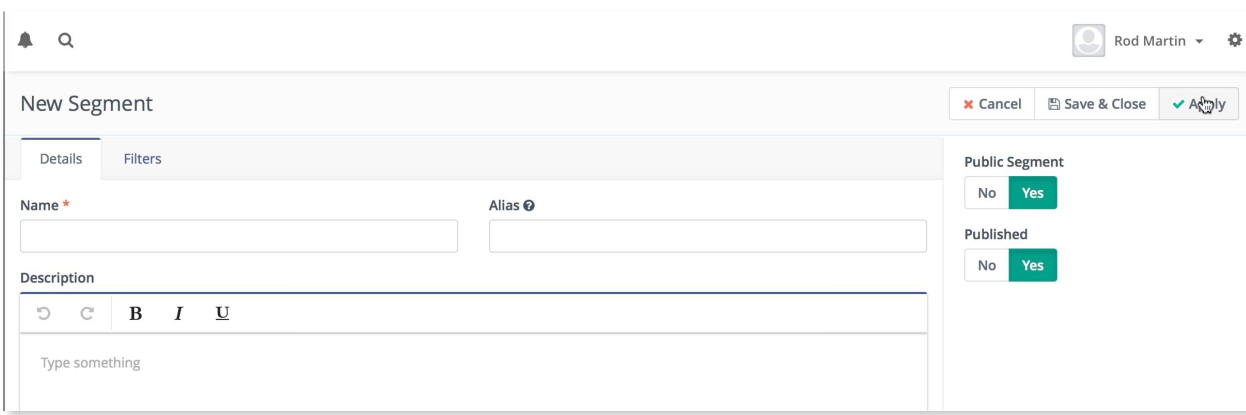
Once contacts are "known", you can begin to create segments or lists of people based on common interests, location, how they came into Mautic, or even how they've interacted with you over time. These can be done manually or completely automated through form and campaign actions.



Segmentation is critical to your success with Mautic.

Creating a segment is very easy. For now, we'll create an empty segment that will be populated by people filling out a form.

1. Click on **Segments**.



2. Click **New** and call it "First Contact".
3. Click **Save and Close**.

Campaigns

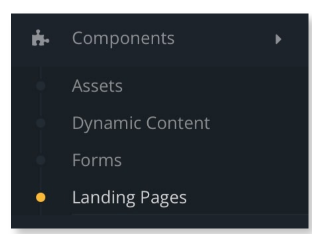
A **campaign** is a **marketing push** that aligns **premium content assets**, (ebooks, videos etc.) and **tactical components** (forms, landing pages, emails, text messages etc.) in a ***coordinated, strategically timed approach*** in support of a ***specific business objective***.

Premium Content Assets and Tactical Components need to be configured and/or created **before** you can create a campaign. In Mautic, you'll find these under the Components and Channels menu items.

In the next **12 minutes,** you'll:
1. Set up a form.
2. Set up a simple landing page to embed the form.
3. Create a follow-up email.
4. Set up a Campaign that will perform the following actions when the form is submitted:
   A. Add the contact to Mautic
   B. Add them to the "First Response" Segment
   C. Send them the follow-up email.
   D. Add 10 points to their profile (points are completely at your discretion).
5. See the results in your dashboard.

Set up a Form

We're going to create a simple form for this exercise. Just a first name and an email address. Forms in Mautic can ask for virtually any information, you'll just need to identify the fields for storing it.

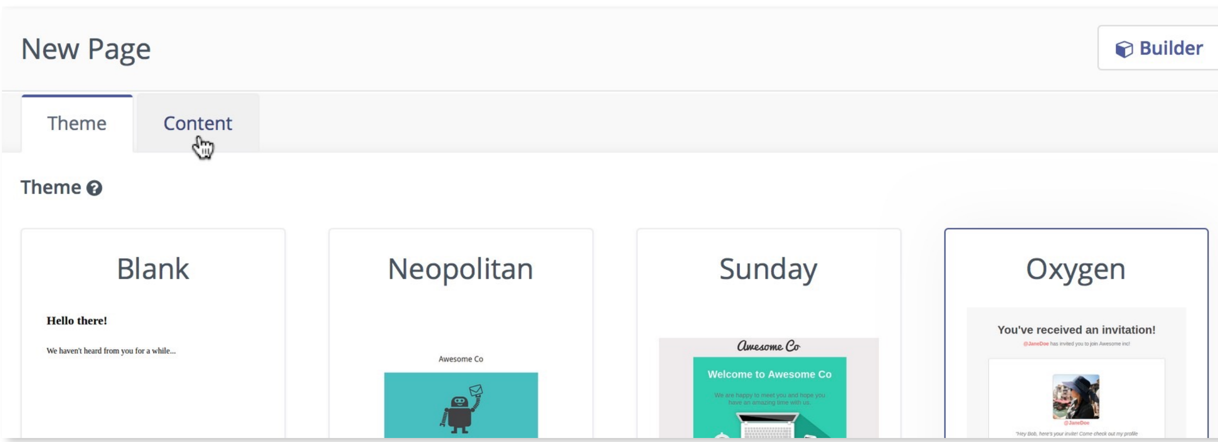


1. Click on **Components** and then **Forms**.
2. Click **New**.
3. Select **Campaign Form**.
4. Enter "First Contact" for the name. Leave the rest of this screen as is.
5. Click on **Fields**.
6. Click on **New** and select **Text**.
7. You'll notice that certain fields are required (*). In the Label field, type "First Name".
8. Click on Contact Field and in the dropdown, select First Name.
9. Click **Add**.
10. Click **Add a field** and select **Email.**
11. Enter "Email" for the label.
12. Click **Add** (the contact field is selected for you in this case).

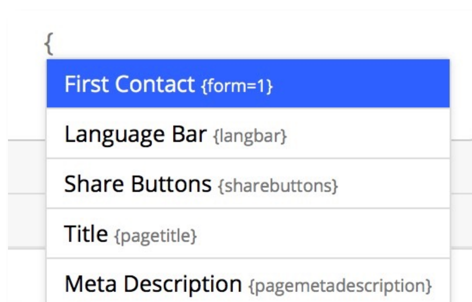
13. Click **Save and Close**.

Set up a Landing Page

1. On the main menu, click on **Landing Pages**.
2. Click **New**. For the purposes of this exercise, we're going to use one of the pre-built templates and just add our form. Of course, landing pages are completely customizable with your own templates and content.
3. On the right side, enter "My First Landing Page" for the Title.
4. Select the Oxygen template. **Click ok** in the warning message that pops up.



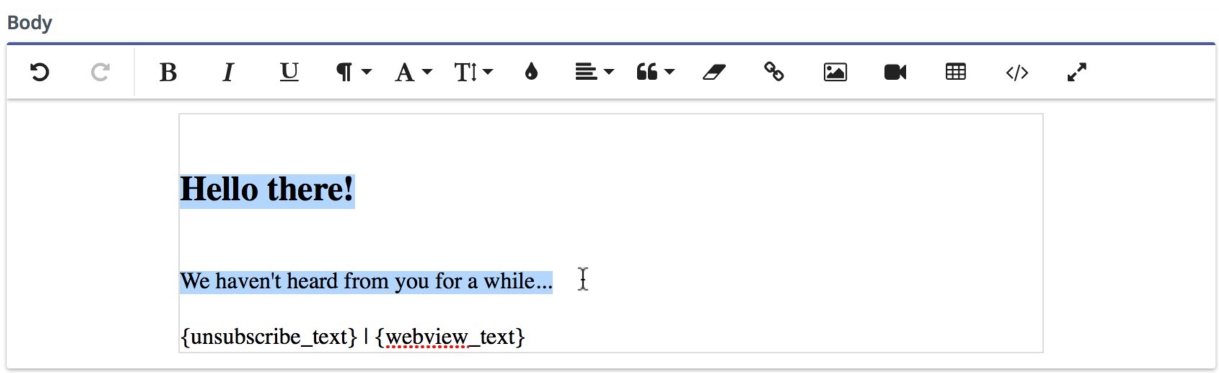
5. Click on **Content.**
6. Highlight the text in the purple button ("I want this!") and press your backspace/delete key to remove the button.
7. Enter the { character (shift left square bracket - top right of your keyboard). Click on "First Contact {form=1}". This will insert the code to embed the form in your landing page.
8. Click **Save and Close**.
9. Click on the **Public Preview link** (on the right side of page). Confirm that the form is embedded in the page but **don't fill in the form yet**.



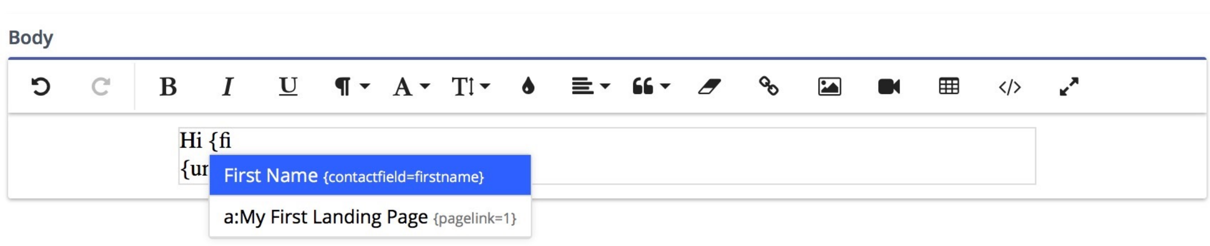
Create the Follow-up Email

One of the most common ways to follow up with the people who fill in your forms is to send them an email with a white paper or other downloadable asset attached.

1. In the main menu, click on **Channels** and then **Emails**.
2. Click **New.**
3. Select **New Template Email**.
4. You'll notice that we have the same templates available in Emails as we did in Landing Pages. You can use a template, create your own, or simply create an email with no template. We'll use the Blank template for this exercise.
5. Click on **Content**.
6. In the subject field, type "**Thank you for requesting this information!**" (Of course, you'll want to craft much better email subject lines!)
7. Highlight the text in the email but not {unsubscribe_text} | {webview_text}, and remove it by pressing delete or backspace.

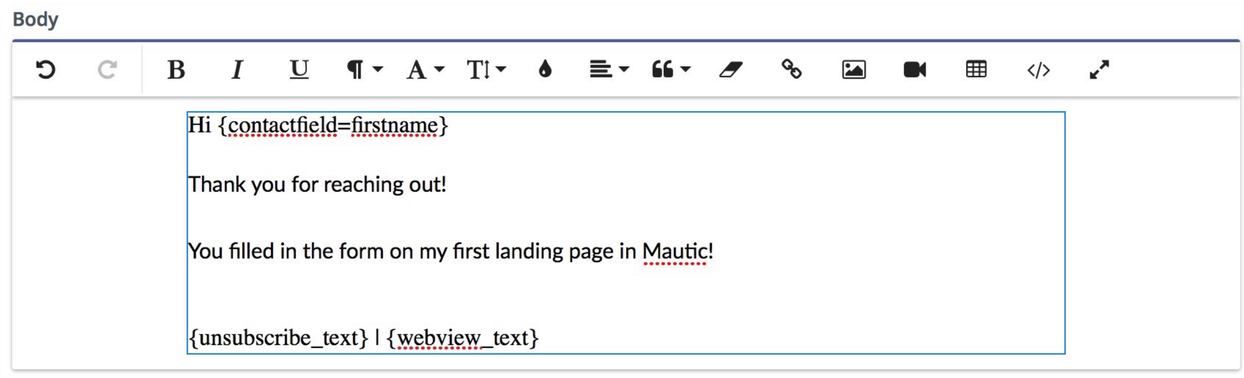


8. Type "**Hi {fi**". You'll see the First Name field pop up. This is called a token. Tokens are available throughout Mautic. Click on First Name. You should see "Hi {contactfield=firstname}". This will insert the contact's first name into every email that is sent by the campaign.



9. Type or copy and paste the following into the email:
   Thank you for reaching out!

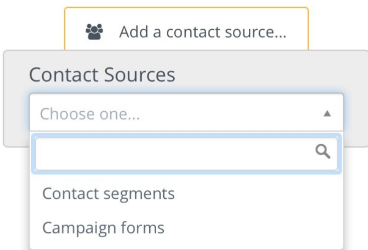
You filled in the form on my first landing page in Mautic!



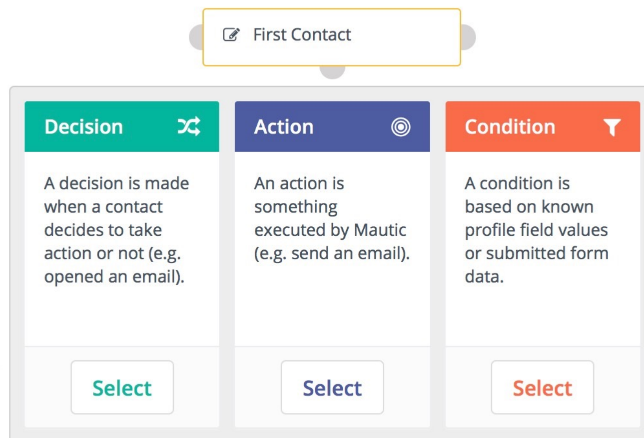
10. Enter "My First Email" for the **Internal Name** (top right) and click **Save and Close**. You'll see the statistics for your email and any click counts from the contents (we did not insert any clickable items).

Configure the Campaign

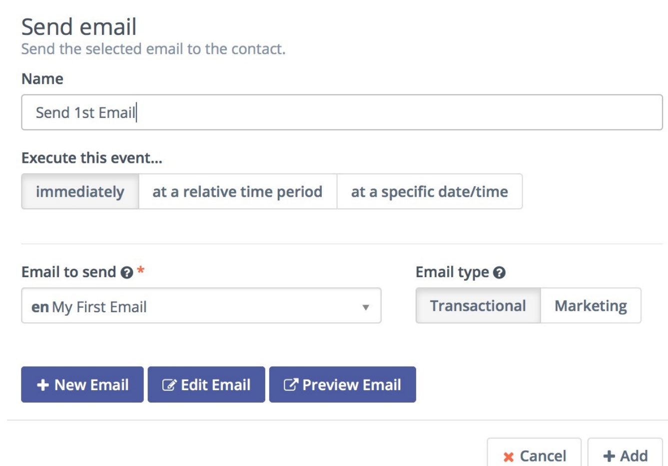
Now that you have your form, landing page and email created, we can configure our first campaign. Campaigns are where we bring all of our work together! Campaigns are very flexible. They are made up of decisions and actions.



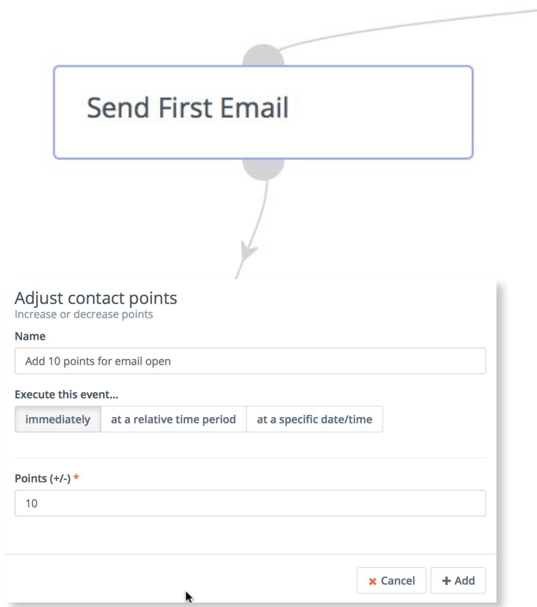
1.Click on **Campaigns** and click **New**.
2.In the Name field type: My First Campaign.
3.Click on **Launch Campaign Builder**.
Campaigns begin with a Contact Source. This is either a segment or a form. Select **Campaign forms**.
4.Click in the field and select the form you created earlier. Click **Add**.



5. You now have a TON of options - but we're going to keep it simple.
6. Click the **Action Select** button. Click on **Modify Contact's Segments**. Type "Move to First Contact Segment" in the Name field. Click in the Add contact to segment field and select the "First Contact" Segment. Click Add.
7. You'll notice a line drawn from between the two boxes. This is called "**connector**". It is drawn between the "**anchors**" on each box.
8. Hover over the anchor on the upper box and click. Select **Action** and then **Send Email**. Name the action "Send 1st Email" and then select "**My First Email**" from the Email to Send dropdown. Click **Add**.



9. The last step is to add 10 points to their profile if they open the email. ***Points are powerful indicators and can be used in a number of ways. They can trigger other actions in campaigns or even an integration etc.*** Click on the **anchor** on the "Send First Email" box. Select **Decision**. Select "Opens Email" from



the dropdown. Enter "Opens 1st Email" in the Name field and click **Add**. Click on the left anchor, and select **Action**, then **Adjust contact points**. Enter "Add 10 points for email open" for the name field and enter "10" in the points field. Click **Add**.
10. Click **Close Builder**.
11. Click in the "**Yes**" box to publish the campaign.
12. Click **Save and Close**. You'll see the statistics for this campaign.

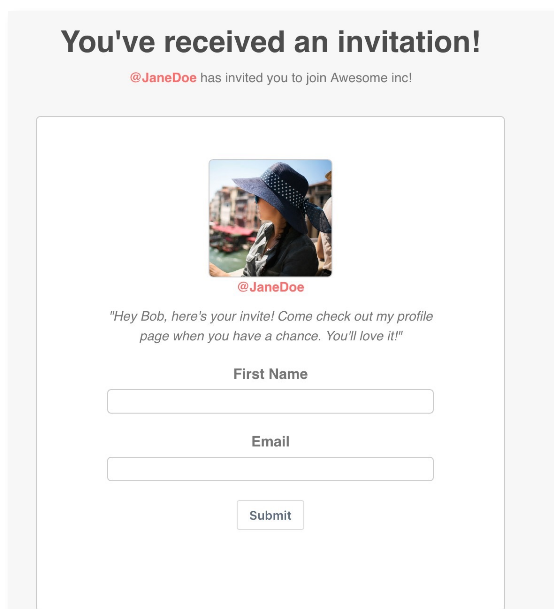
You're almost done!

Evaluate: See the Results!

The only thing left to do is test out your new campaign!

1. Click on **Components** and then **Landing Pages**.
2. Click on **My First Landing Page**.
3. **Copy** the URL for the Public Preview (right-click on the URL and click "Copy").

IMPORTANT: You will either need to log out at this point or open that link in a different browser since Mautic does not track clicks/opens if you're logged in.



4. Either logout or open a new browser (not just a new window of the browser you're using). So if you're using Firefox, open Chrome. If you only have one browser installed on your computer, log out of Mautic.
5. Paste the URL into the address bar of your browser. You should see your landing page. Go ahead and fill in the form **using your real name and email address!**
6. Click on Campaigns -> My First Campaign. You'll see that one person has been processed in the campaign.
7. Click on Channels -> Emails. You'll see that

one email has been sent. **Check your email!** (it may take a few minutes to arrive).

8. **Open the email,** then go to Contacts and click on your first name. Scroll down and you'll see the **entire history** of your interaction with Mautic.
9. Ask yourself how Mautic works! (*hint: it's magic!*)

To summarize…

You can see the results of your work in a number of different ways, depending on how you set-up your campaign.

- Click on the Form to see who responded.
- Click on the Email to see sends, bounces and opens.
- Click on any Contact to see their entire history.
- Click on any Campaign to see every action that was triggered.

Finally, Mautic has a number of **reports** you can use to see progress.

1. Click on **Reports**
2. Click on **Leads and Points** to see an example.

Key Resources

1. Mautic documentation - https://docs.mautic.org/en
2. Developer documentation - https://developer.mautic.org
3. OSTraining - https://www.ostraining.com/class/mautic/