LEAD GUERRILLA USER GUIDE

Your complete guide to using Lead Guerrilla

Navigating This Guide:

This Guide has been designed to be helpful both as a printed document, and as an electronic document accessed on your computer screen. If you are accessing it via a PDF viewer such as Acrobat Reader or Mac Preview, please notice:

1. The Table of Contents entries are all live hyperlinked to the pages to which they refer.
2. At the top of each page there is a link back to the start of the Table of Contents.
3. Be sure to use the search feature of your PDF reader.

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1.0 Welcome to Lead Guerrilla 6
1.1 Revision History 6

2.0 Getting Started 7
2.1 What Is Lead Guerrilla? 7
- 2.1.1 How Does It Differ From 1CRM? 7

2.2 How Do I Install It? 8
2.3 How Do I Set It Up Prior to Use? 8
- 2.3.1 Download the IP lookup service database 8
- 2.3.2 Install Website Tracking 9
- 2.3.3 Install the Lead Guerrilla Plugins 9
- 2.3.4 Configure Email Settings 9

2.4 What is Involved in Implementation? 10

3.0 Using Lead Guerrilla 11
3.1 Dashboard 12
- 3.1.1 Report Graph Dashboard Widget 13

3.2 Calendar 14
3.3 Contacts 15
- 3.3.1 Table View & Cards View Modes 16
- 3.3.2 Contact Types 16
- 3.3.3 Importing Contacts 17

3.4 Companies 19
3.5 Segments 20
3.6 Components 21
- 3.6.1 Assets 22
- 3.6.2 Forms 22
- 3.6.3 Landing Pages 23
- 3.6.4 Dynamic Content 30

3.7 Campaigns 31
- 3.7.1 Contact Sources 31
- 3.7.2 Actions 31
- 3.7.3 Decisions 31
- 3.7.4 Conditions 32
- 3.7.5 Creating a Campaign 32

3.8 Channels 36
- 3.8.1 Contact Preferences: Channels, Categories & Unsubscribe 36
- 3.8.2 The Lead Guerrilla Unsubscribe / Message Prefs Page 38
- 3.8.3 Marketing Messages 40
- 3.8.4 Configuring Text Messaging Via Twilio 41
- 3.8.5 Configuring Twitter Using the Plugin 42
- 3.8.6 Configuring Web Notifications Via the OneSignal Plugin 43
- 3.8.7 Emails 44
- 3.8.8 Web Notifications 47
- 3.8.9 Text Messages 48
- 3.8.10 Social Monitoring 48

3.9 Points 50
- 3.9.1 Manage Actions 50
- 3.9.2 Manage Triggers 51

3.10 Stages 52
3.11 Reports 53

3.11.1 How to Build a Report in Lead Guerrilla....55
3.11.2 Emails Sent Report....56
3.11.3 Messages Queued Report....57
3.11.4 Segment Membership Report....58
3.12 Help System....59

4.0. Contact Monitoring....61
4.1. Website Monitoring....61
4.1.1 Javascript (JS) tracking....61
4.1.2 Tracking Pixel tracking....63
4.1.3 Content Management System Plugins....65
4.1.4 Mobile Monitoring....66
4.1.5 Steps in Lead Guerrilla....66
4.1.6 Steps in your App....66
4.1.7 Other Online Monitoring....67

5.0 Administering Lead Guerrilla....68
5.1 Personal Account Settings....68
5.2 System Settings & Administration....69
5.2.1 Themes....70
5.2.2 API Credentials....71
5.2.3 Categories....71
5.2.4 Configuration....72
5.2.5 System Info....73
5.2.6 Users....74
5.2.7 Roles....75
5.2.8 Webhooks....76
5.2.9 Custom Fields....78
5.2.10 Plugins....79

6.0 1CRM Integration....80
6.0.1 One-Way or Two-Way Sync?....80
6.0.2 Configure the Lead Guerrilla Plugin....80
6.0.3 Configure the 1CRM Settings for Lead Guerrilla Sync....81
6.0.4 1CRM / Lead Guerrilla Field Mapping....82

7.0 1CRM / Lead Guerrilla Plugin....84
7.1 Edit a Lead Form in the Plugin....84

8.0 Content Management Plugins....87
8.1 WordPress Tracking & Forms Plugin....88
8.1.1 Installation....88
8.1.2 Configuration....88
8.1.3 Usage....88
8.1.4 Forms, Dynamic Content, Gated Videos and Tags....89
8.2 Joomla! Tracking & Forms Plugin....90
8.2.1 Visitor Tracking for Joomla! Sites....90
8.2.2 Forms, Dynamic Content and Gated Videos....90
8.2.3 Plugin Authorization....91
8.3 TYPO3 Tracking & Forms Plugin....92
8.3.1 Installation (via Composer) (recommended)....92
8.3.2 Installation (without Composer)....92
8.4 Drupal Tracking & Forms Plugin....93

8.4.1 Key features 93
8.4.2 Installation 93
8.4.3 Lead Guerrilla Tracking Image 93
8.4.4 Form Embedding 93

9.0 Email Configuration Details 94
9.1 Emailing with Lead Guerrilla 94
9.1.1 Template Emails 94
9.1.2 Segment Emails (Broadcasts) 94
9.1.3 Email Formats 94
9.1.4 Email Delivery 94
9.1.5 Immediate Delivery 95
9.1.6 Queued Delivery 95
9.1.7 Email Fields 95
9.1.8 Tracking Opened Emails 95
9.1.9 Tracking Links in Emails 96
9.2 Bounce Handling 96
9.2.1 Monitored Inbox Settings 96
9.2.2 Create a Segment with Bounced Emails 98
9.3 Elastic Email Webhook 98
9.4 Amazon Webhook 99
9.5 Mandrill Webhook 102
9.6 Mailjet Webhook 103
9.7 Sparkpost Webhook 105

10.0 Cron Task Configuration 107
10.1 Standard Cron Tasks 107
10.1.1 Segments 107
10.1.2 Campaigns 107
10.2 Optional Cron Tasks 108

1.0 Welcome to Lead Guerrilla

What we all need is more leads!

Well maybe not ALL of us - but if you are looking at Marketing Automation systems, its probably safe to assume you are in that group.

Most entrepreneurs who have been in business for a while are fairly confident about their ability to make a sale to an interested customer. The challenge often boils down to needing more interested customers to pitch to! And that's where Lead Guerrilla comes in.

Picture a black box that plugs into the wall. Plug it in, turn on the switch, and qualified leads with an interaction history and lead score are automatically added into your CRM system, day in and day out, while the system is running.

You'll also get charts and feedback on which messages clients respond to best, so that the 'machine' can just get more and more effective over time.

Sound good? It really is! Stick around, and we'll explain it to you.

1.1 Revision History

1.0 September 2016 - First Edition.

1.1 January 2017 - Added details of 1CRM integration, Common Admin Tasks

1.2 March 2017 - Updated images, Plugins information, Custom fields, Webhooks, Themes, and 1CRM integration. Companies also added to data model. Contact Monitoring section added. Wordpress Plugin for Unified Lead Capture section added.

1.3 July 2017 - Updated Landing Page editor section, some details on Contact Monitoring and Content Management plugins. Updated information on Contact Preferences, the *Unsubscribe / Message Preference* screen, and the *Themable Unsubscribe Page*. Updated details of *Twilio* and *OneSignal* Web Notifications configuration.

1.4 September 2017 - Added Chapter 8: Content Management System plugins.

1.5 October 2017 - Added Chapter 9: Email Configuration Details, and Chapter 10: Cron Task Configuration.

1.6 December 2017 - Updated and expanded details for Reports and Report Graph dashboard widget. (Version 2.12.0)

2.0 Getting Started

Thank you for using Lead Guerrilla! This Guide exists to explain the general operating principles of Lead Guerrilla, and the various options you have when using this system.

2.1 What Is Lead Guerrilla?

Lead Guerrilla is a Marketing Automation system. What is that? Marketing automation typically refers to the use of a computerized system whose goal is to automate marketing activities. Most marketing departments have to perform large volumes of repetitive tasks such as emails, texts, social media posts and monitoring, website monitoring, and updating client records. The technology of marketing automation makes these tasks easier, and ensures that they are performed more consistently, in a more timely manner, and with fewer resources. It then measures your results and helps you improve your marketing process, and your business performance.

Lead Guerrilla does this either as a stand-alone system, or in conjunction with a linked 1CRM Customer Relationship Management system - or a CRM from another vendor such as Salesforce.com, Hubspot, Pipedrive, SugarCRM, vTiger or ZohoCRM.

2.1.1 How Does It Differ From 1CRM?

1CRM is a CRM with a very broad feature set including some email marketing capabilities built in. It contains a Campaigns module, which allows you to define:

- Email, Drip-feed Email, and Newsletter Campaigns
- HTML Email Templates for these Campaigns to use
- Target lists consisting of Leads, Contacts, and Targets (pre-Leads)
- Tracker URLs to help track recipient clicks within emails

The 1CRM system can send one or more emails at selected times and intervals, and produce charts and statistics about the results of email campaigns. Clients that opt-out of receiving further emails are tracked and respected. And target lists can be created manually, by system reports, or auto-generated and maintained as all leads/contacts/targets that meet specified criteria.

For many businesses, this capability represents all the marketing automation they require. At least for now. But as their business grows, and as the world (and competitors) becomes increasingly more sophisticated, your business may need even more marketing power.

That power is Lead Guerrilla - and that's why 1CRM Systems Corp. developed it to complement 1CRM.

Lead Guerrilla (`www.leadguerrilla.com`) is a Marketing Automation system which is fully integrated with 1CRM. Contacts within Lead Guerrilla can be synchronized bidirectionally with Leads or Contacts in 1CRM. In addition to Leads & Contacts Lead Guerrilla shares the concepts of Email Templates, and Campaigns. Instead of Target Lists it has Segments that have much the same role: a Segment contains the list of recipients for a Campaign.

- The system contains Contacts, which can be rated by Points and Stages, and organized into Segments. Contacts can have names, or be anonymous IP addresses waiting to be identified.

- A highly informative and configurable system dashboard shows you anything you want to know about your marketing automation progress and success.
- Landing Pages and Stand-Alone Forms have an advanced Builder tool which draws on Dynamic Content and file Assets, and may contain 17 types of variable fields. A wide variety of high quality ready-made templates are included. Stand-Alone Forms can also perform a variety of Actions.
- Campaigns include a visual Campaign Builder to design Campaign Workflow, including Contact Sources, Decisions, Conditions and Actions.
- In addition to sending customized and programmable email campaigns, the system also performs email address validation, as well as A/B testing for Landing Pages and Email Templates.
- Social activity monitoring (Twitter) is included, and together with tracking website activity and email activity combine to influence lead scoring.
- Lead Guerrilla can also send automated Tweets, and SMS messages.
- A comprehensive report designer lets you easily generate reports providing the information you want.

The following pages explain the use and administration of the system in more detail. While section 3 of this User Guide is organized as more of a reference style document, this section exists to help you understand the system as a whole, where to look to find out how to perform specific tasks, and which tasks you should do to get started.

2.2 How Do I Install It?

You don't! You just use it as a Cloud service.

- Use the Lead Guerrilla Cloud Service with a linked 1CRM system (either On Premise or Cloud)
- Use it as a stand-alone Cloud Service

Subscribe to Lead Guerrilla at www.leadguerrilla.com.

2.3 How Do I Set It Up Prior to Use?

Once you login to your new Lead Guerrilla system you will find you have a lot of useful items pre-installed. You will find plenty of email templates to use to adapt for your own purposes. You'll also see a number of predefined Campaign workflows, as well as a selection of Forms and Landing Pages.

Finally, the system also includes a good range of pre-defined reports, as well as an initial Dashboard setup with a selection of widgets, ready for you to edit as preferred.

Your system administrator will need to refer to Section 4: *Administering Lead Guerrilla* to configure a number of system settings to use your email accounts for emails to be sent, as well as define and organize the various users that need access to your system. A few key initial tasks include:

2.3.1 Download the IP lookup service database

By default, Lead Guerrilla is installed set to use MaxMind's free GeoLite2 IP lookup database. Due to the licensing of the database, it cannot be included with Lead Guerrilla's installation package and

thus must be downloaded. Click on the ⚙ icon in the upper right hand of Lead Guerrilla to view the Settings menu then click *Configuration*. On the *System Settings* tab, scroll down to find the IP lookup service option and click on *Fetch IP Lookup Data Store*. Once complete, save your configuration. The *Last Updated* date for this database will be saved and shown as a reminder to update it in future.

You could also choose another supported IP lookup service if you prefer. This database is used to translate IP addresses for unknown Visitors into approximate geographical locations.

2.3.2 Install Website Tracking

After installation you will need to add a simple javascript to the websites for each site you wish to track via Lead Guerrilla. This is a very simple process and you can add this tracking script to your website template file. Here is an example of the tracking javascript:

```
<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','http://demo.leadguerrilla.cloud/mtc.js','mt');

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

You can install the tracking code yourself manually, or there are plugins available for popular Content Management Systems - WordPress, TYPO3, Drupal and Joomla!. These typically use multiple techniques including javascript, tracking pixel, cookies and device fingerprints. Checkout the Section on Contact Monitoring for more details.

2.3.3 Install the Lead Guerrilla Plugins

Click on the ⚙ icon top right, and select *Plugins* from the Settings menu. Next click on the button top right labelled *Install / Upgrade Plugins*, and they will appear on that screen.

2.3.4 Configure Email Settings

Sending email is an important part of Lead Guerrilla's role. Lead Guerrilla will use SMTP account information which you provide to send its emails. Click on the ⚙ icon top right, and select *Configuration* from the Settings menu. Next click on the *Email Settings* tab on the left. Within the *Mail Send Settings panel, enter values for the SMTP host, your Name to send mail as, E-mail address to send mail from, SMTP encryption type, SMTP* port, *SMTP authentication mode*, *Username* and Password.

Note: Use a reliable SMTP server that you know is not blacklisted. For example, we use Sendgrid for our own email campaigns. (Up to 20,000 emails for US$9.95 / month, with larger plans for more emails.) We also recommend using http://mailtester.com to check your sent emails are not seen as SPAM by recipients.

You should test your settings, using the *Test Connection* button, then the *Send test email* button. Once email sending seems in good working order, click on Save & Close .

2.4 What is Involved in Implementation?

Once your Lead Guerrilla system is installed and working, and setup by your system administrator ready for basic use as described in the section above - what comes next?

Note: A detailed treatment of the step-by-step implementation process for Lead Guerrilla may be found on the website's Getting Started pages.

A normal initial pattern for a full implementation of Lead Guerrilla might look something like this:

- Implement website visitor tracking (may include installing plugins)
- Design and implement web forms (may include installing plugins)
- Landing pages: You may want some landing pages, and A/B testing of them
- Design a segmentation scheme (including *Public* vs: *non-Public* segments) for things like Newsletters, hot leads, existing customers, subscription renewals, etc ..
- Configure your Unsubscribe / Message Preferences page
- Design & create Email templates for use in Campaigns
- Create Text Messages and/or Marketing Messages
- Setup the Twitter integration plugin if you will use Twitter messaging and monitoring
- Setup the Twilio integration plugin if you will use SMS/text messaging
- Design and create Campaigns for processing new leads from Forms
- Design and create Campaigns for processing leads that join new segments
- Design and implement a lead scoring scheme and its actions
- Add custom fields to 1CRM and Lead Guerrilla for process integration
- Configure the 1CRM integration plugin
- Perform the Initial data migration from 1CRM or other data source, using the 1CRM integration, CSV import, or other process
- Identify the desired Reports & Dashboards and implement them

Enhancements such as defining and using Stages, and implementing Web Notifications may also be desirable at this stage.

All through this process you can get help from 1CRM as part of any implementation package you may have purchased. Lead Guerrilla can be regarded to some degree as a salesperson. As nice as they may be, sales is all about *what have you done for me lately?* And Lead Guerrilla is not doing its job unless it is much more than paying for itself with lead generation that produces sales, and continuing customer contact for the same purpose.

Our job at 1CRM is not simply to build a great Marketing Automation software system. It is to make your organization successful in its Marketing Automation initiatives. This includes such things as best practices, A/B testing, adapting landing pages and email templates, keyword optimization - whatever you need help with.

3.0 Using Lead Guerrilla

Lead Guerrilla is operated using a web browser - just point it at the URL you were provided for your Lead Guerrilla instance, and login with your user name and password. Within the browser window, you use the Lead Guerrilla menu bar on the left side of the screen to navigate. The following sections describe the functions available within each top-level option on that menu bar.

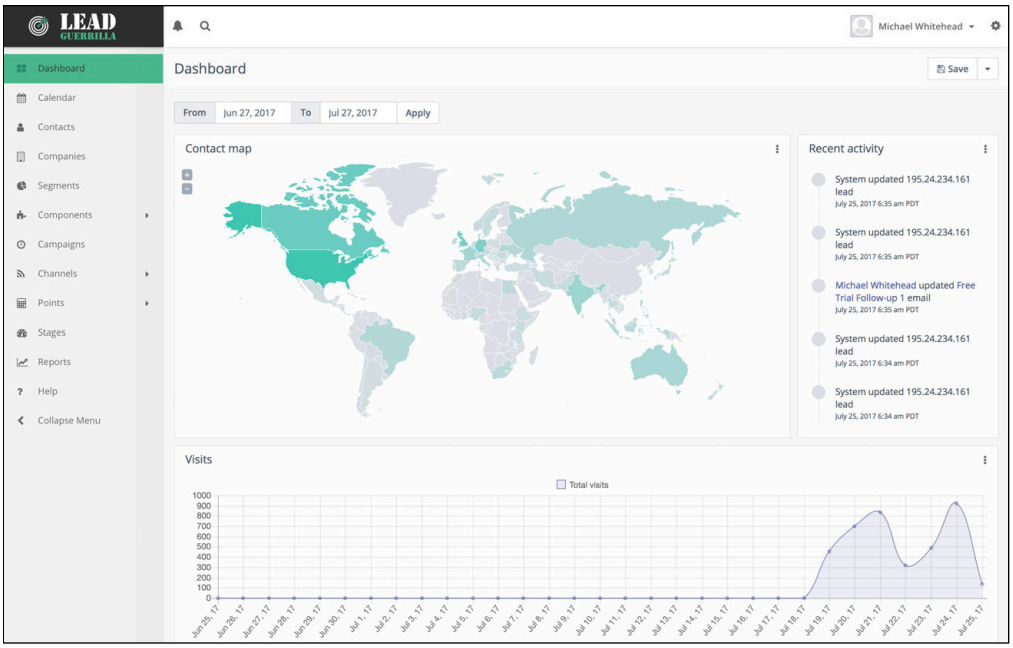

Figure 1: Lead Guerrilla Menu (Normal)

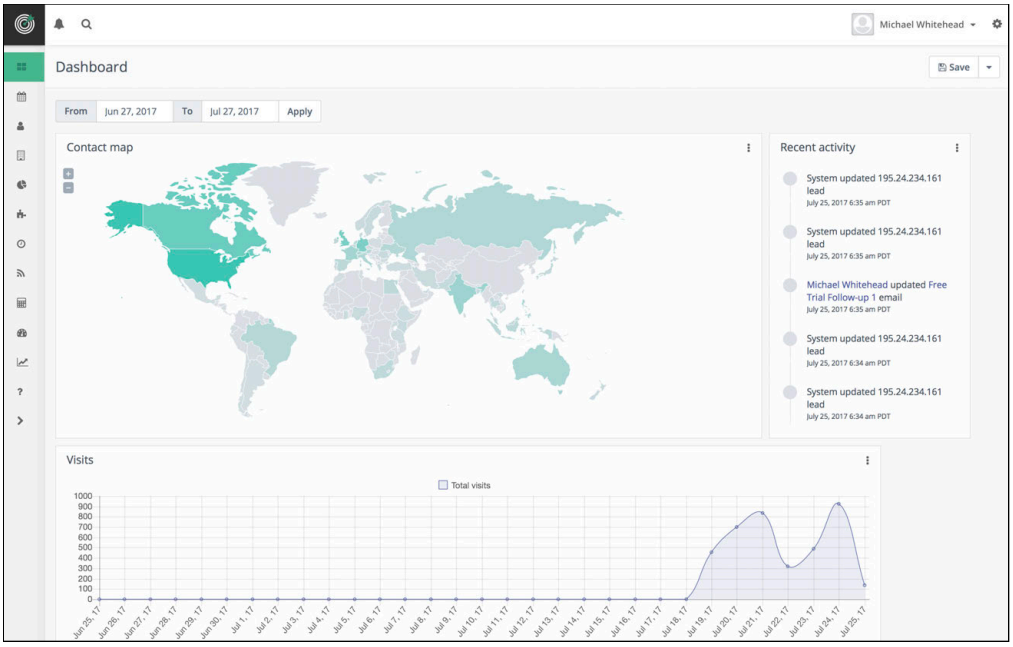

Figure 2: Lead Guerrilla Menu (Collapsed)

3.1 Dashboard

The first menu option is the Dashboard. Your Dashboard comes pre-configured with a number of widgets (information sections) on it.

To *Add* new widgets, simply click on the dropdown control top right (see Figure above) and select ✚ Add widget - you'll find a large selection of widgets to choose from:

- 1 Core Widget
- 4 Asset Widgets
- 2 Campaign Widgets
- 7 Email Widgets
- 4 Form Widgets
- 8 Contact Widgets
- 6 Page Widgets
- 1 Point Widget
- 1 Report Widget
- 1 Stage Widget

To *Remove* existing widgets, click on the actions icon ⋮ at the top right of each widget, and select the Remove option.

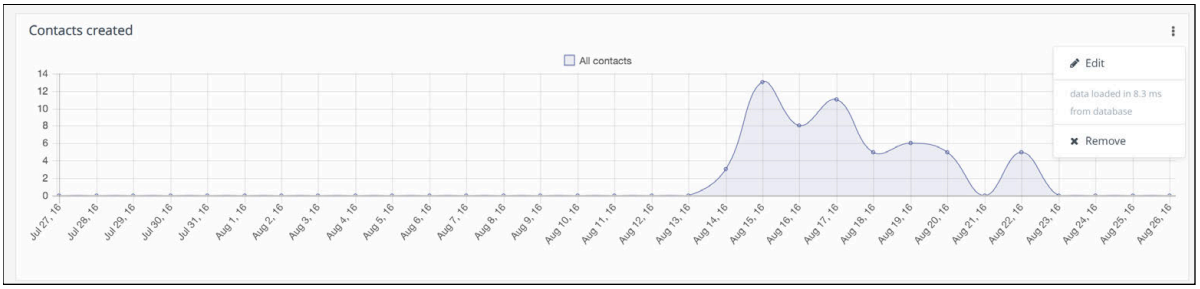

Figure 3: Dashboard - Widget Action Options

To *Edit* existing widgets, click on the ⋮ icon at the top right of each widget, and select the Edit option.

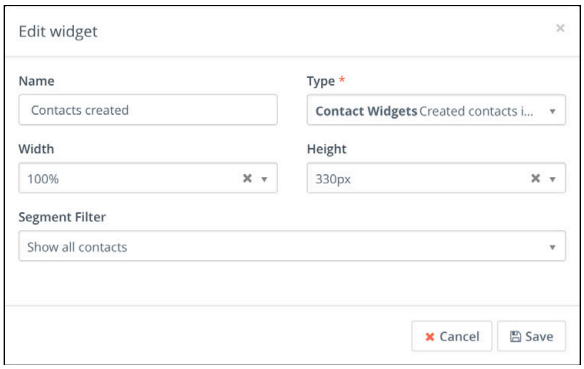

Figure 4a: Dashboard - Edit Widget Configuration Options

Here you can set the name and size of the widget, choose which widget type to display, and the segment filter to be used for the data to be displayed. (Different widgets have a variety of different configuration options to set.)

To rearrange widgets on your Dashboard simply click in the widget title bar, and drag it to the desired location on the Dashboard. Then click on the dropdown control top right and select *Save*, to save your new dashboard layout.

3.1.1 Report Graph Dashboard Widget

Every graph contained in each report is made available as a widget on the dashboard allowing complete customization of the dashboard. If you don't see the dashboard widget you want, you can make your own new chart widget by generating a chart from a report, then adding the widget for that chart to your dashboard.

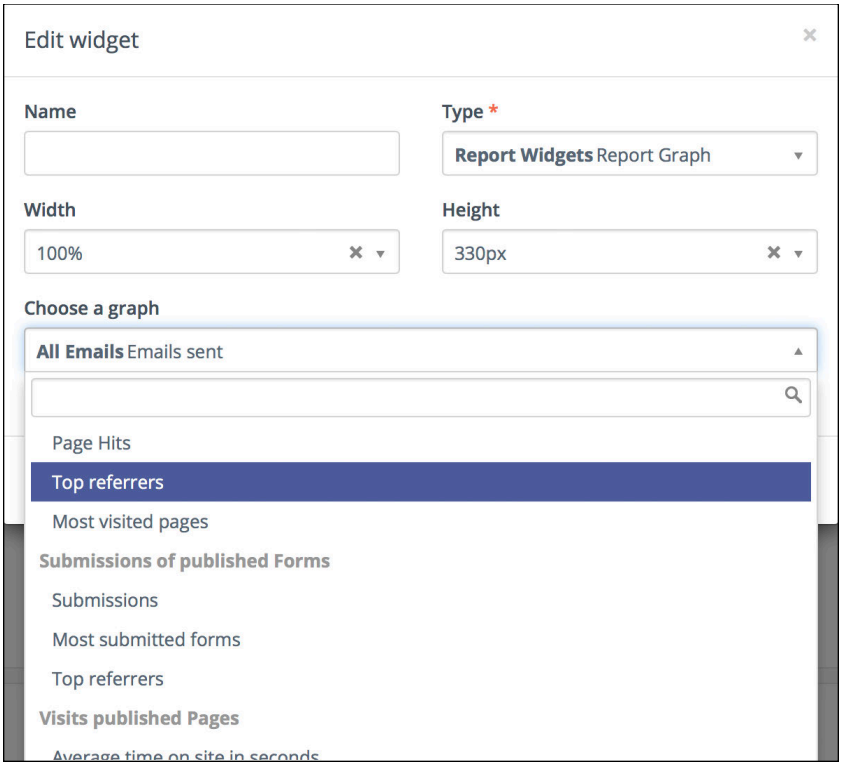

Figure 4b: Configuring the Report Graph Dashboard Widget

3.2 Calendar

The Lead Guerrilla Calendar is shown below. In addition to showing a monthly Calendar, it shows information about system activities on each date. Some of the information shown on each date includes:

- Emails sent
- Adding Contacts to Segments
- Past Campaign Actions which have been Triggered
- Future scheduled Campaign Actions which will be Triggered

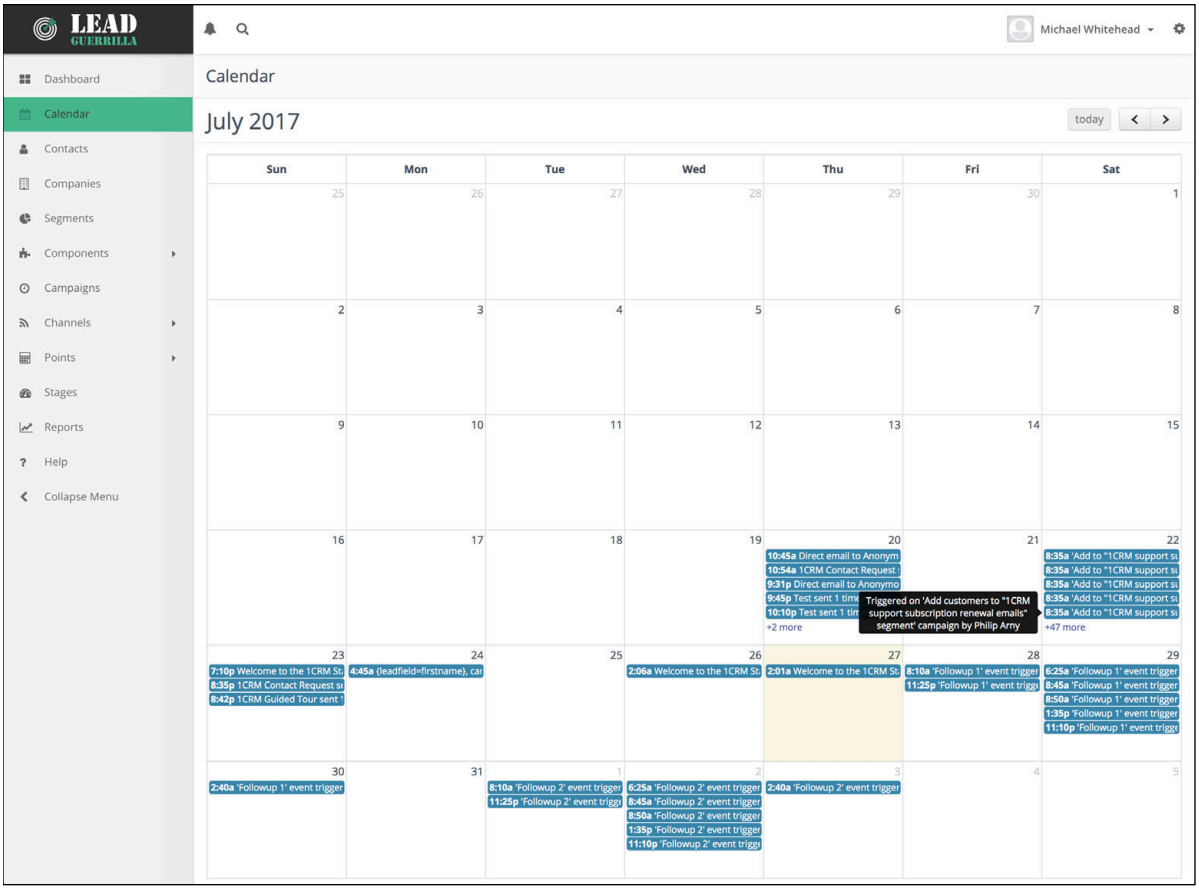

Figure 5: Lead Guerrilla Calendar

You can move backwards and forwards between months, and there is a dedicated *today* button to move quickly back to the current month.

3.3 Contacts

The Contacts module is where you will keep the records for all the clients and potential clients you want targeted by one or more of your Marketing Automation activities within Lead Guerrilla.

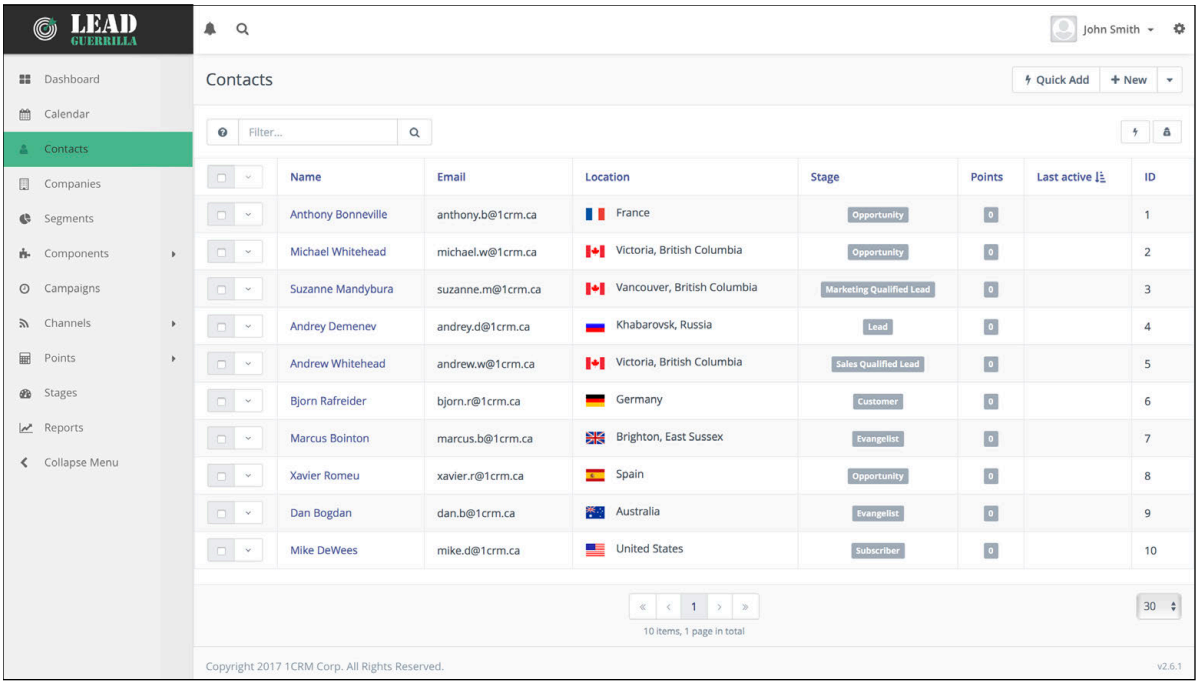

Figure 6: Lead Guerrilla - Contacts List View (Table Mode)

Within the Contacts list view (above) you can organize your Contacts by Stage and by Points, as well as tracking their address and other conventional lead data such as company name, email address, phone and fax numbers, etc ..

Using the dropdown control top right or the + New button you can add new Contacts manually, and Import or Export them in a batch. In the List view, country flags show for Contacts where the country has been identified.

Several other controls are available to perform additional functions:

- Enables live mode - new Contacts are added automatically to the top of the segment as they are created
- Toggles the display of Anonymous Visitors (Contacts with just an IP address)
- Batch edit the Segments assigned to selected Contacts (to do this, or any of the next 4 options, you must first select one or more Contacts by clicking on the checkbox at the far left of each Contact)
- Batch edit the Stage to be assigned to selected Contacts
- Batch edit the Campaigns to be assigned to selected Contacts
- Set selected Contacts to *Do Not Contact*
- Delete selected Contacts

3.3.1 Table View & Cards View Modes

Use the T or C shortcut keys while on the Contacts List view to toggle between *Table* view and *Cards* view (shown below).

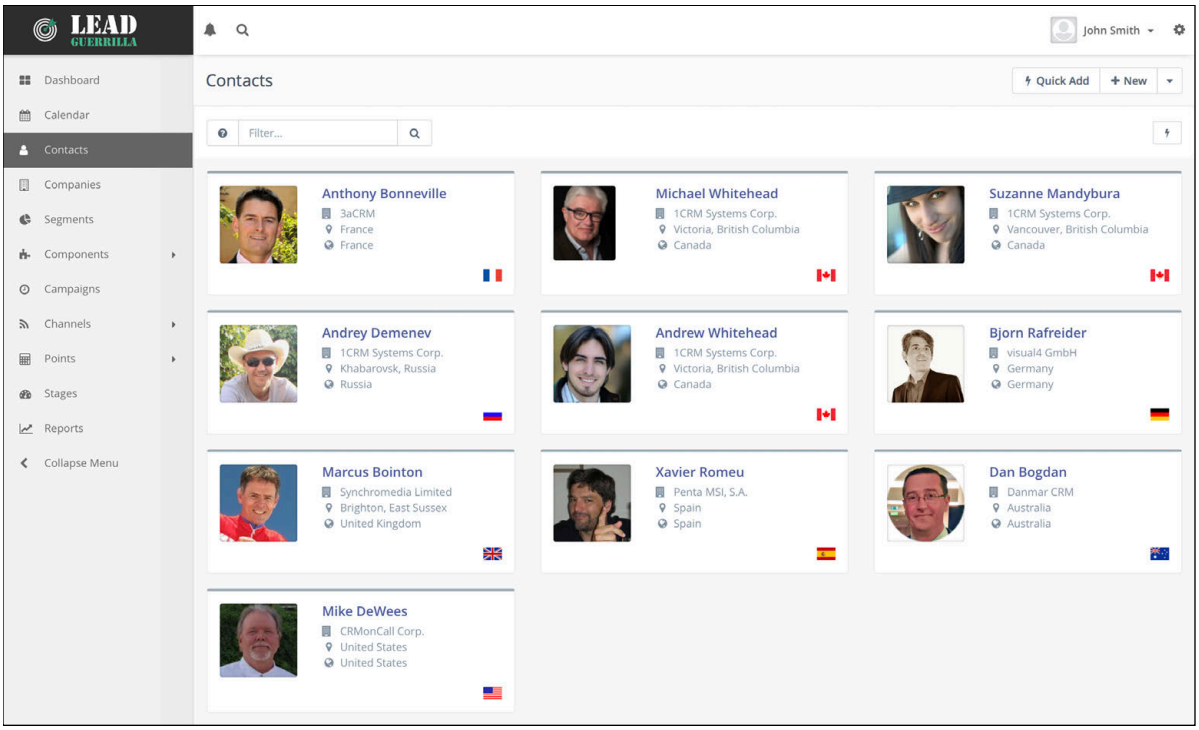

Figure 7: Contacts List View (Cards Mode)

Contacts data can be edited manually by selecting one contact from the list view, and then editing it. But it can also be changed by the action of a Campaign.

Campaign workflows can increase or decrease the Points value for a Contact, or change the Segments to which the Contact is assigned. For more details, see the section on Campaigns.

3.3.2 Contact Types

There are two types of contacts:

- *Visitors* — Visitors to your site who have not yet been identified by a form or other interaction. These Contacts are tracked by Lead Guerrilla but typically remain hidden so as not to clutter your Segment.
- *Standard contacts* — Contacts which have identified themselves via a form or some other source. As a result, these Contacts typically have a name, email, and other identifying fields.

You can view Visitors only in the *Table* view of the Contacts module, which has a control to toggle their display. Visitors are worth tracking, because these could be future customers. By tracking them before they have any more personal interaction, you can retain a log of when they visited your site, which allows you to get a picture of their activity prior to engaging with you.

3.3.3 Importing Contacts

Contact can be imported via the Lead Guerrilla user interface from a CSV file.

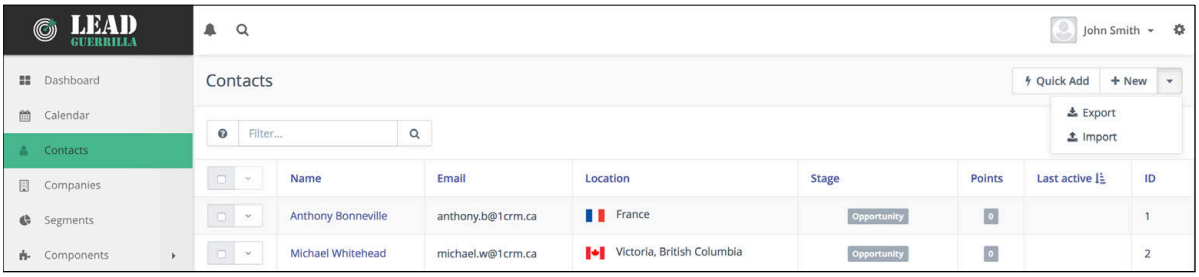

Figure 8: Import Contacts

How to import contacts

1) Go to the *Contacts* module, and in the top right corner select *Import* as shown above.

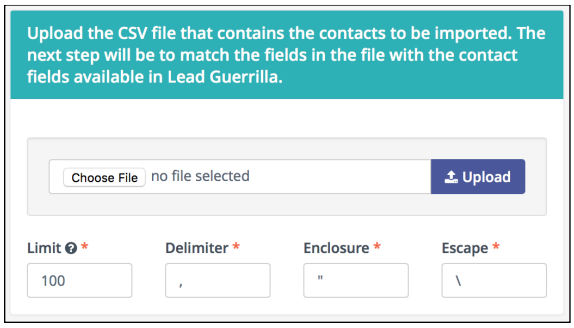

Figure 9a: CSV Settings and File Upload

2) Adjust the CSV settings if your CSV file uses something else as a Delimiter, Enclosure or Escape character. Set *Limit* to the maximum number of Contacts to import per session. (***Note:*** Importing too many Contacts in one session can cause your server to run slowly, or run out of memory, so be sure to divide up large files into files of a manageable size.)
3) Upload the CSV file with the Contacts you want to import.
4) The field mapping page will be displayed (see Figure 9b). The first set of options will let you select owner, segment and tags to assign globally to all imported Contacts. The second set of options will let you map the columns from your CSV to Lead Guerrilla Contact fields. The third set of options will let you map columns from your CSV to special Contact attributes like *Date Created* and so on.
5) When your field mapping is ready, click the button to *Import in browser* or *Import in background*.
6) A page with a progress bar will appear if you chose *Import in browser*, so you can monitor the import process.
7) When the import is finished, any potential import issues will appear below the progress bar.

Requirements

1) The CSV file must be in UTF8 encoding. The documentation of your spreadsheet program should explain how to export a spreadsheet to UTF8. Google Sheets encodes to UTF8 automatically, Libre/Open Office let you choose before export.

2) In case of boolean values like *doNotEmail* or a custom boolean field, use values *true*, *1*, *on* or *yes* as TRUE values. Anything else will be considered FALSE.

3) In case of date/time values, use YYYY-mm-dd HH:ii:ss format i.e. 2017-01-31 19:08:00.

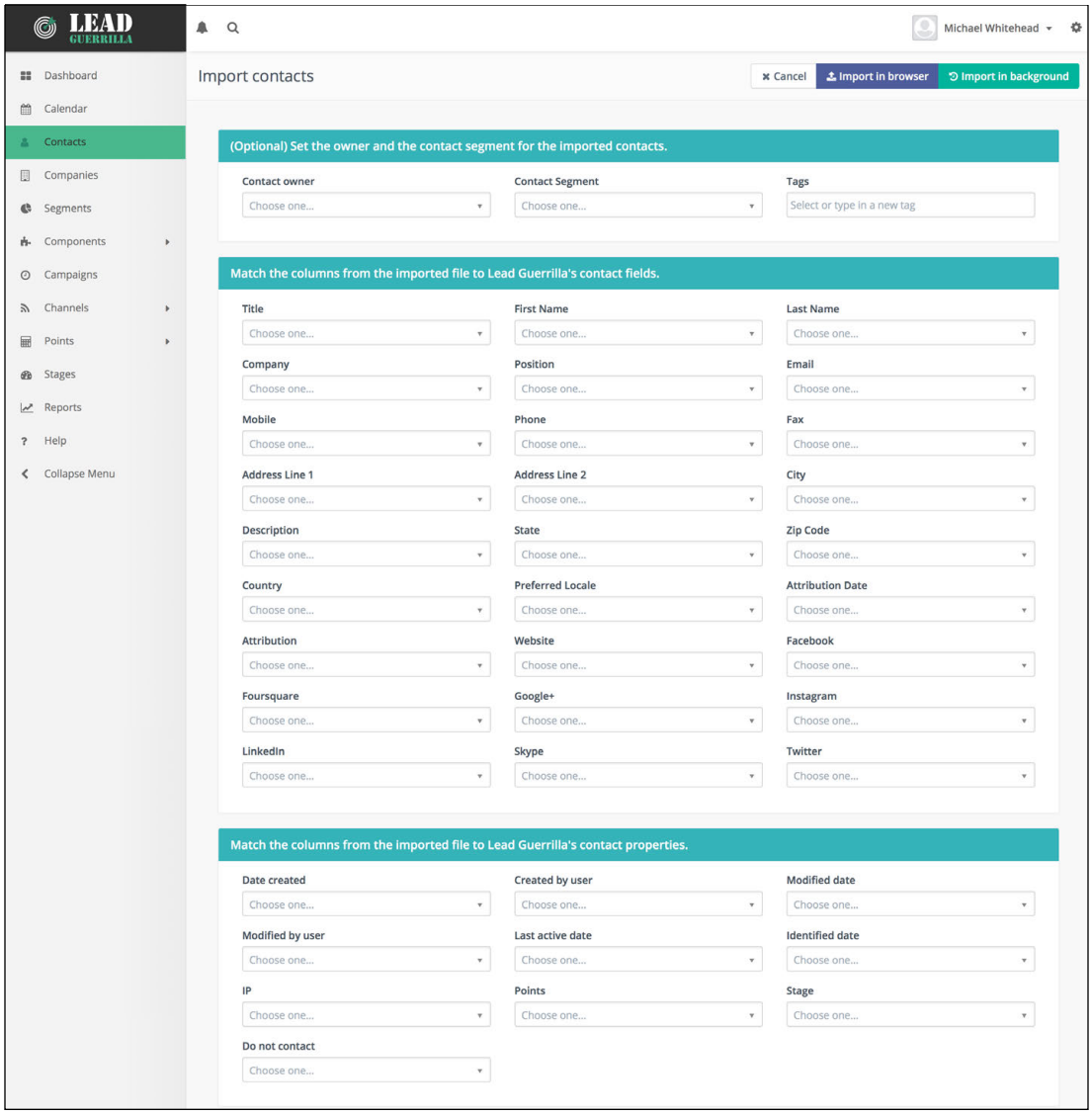

Figure 9b: CSV Field Mapping

Tip

1) Set the column names in your CSV file to match the corresponding Lead Guerrilla Contact field *Alias* values, not the field *Labels*. This way Lead Guerrilla automatically pre-selects the mapping for you when you import the CSV file.

   For example if the first column in your CSV contains values for First Name fields for your Contacts, set the column name in the CSV file to be *firstname*, and this field will be mapped automatically as it is imported.

   Note: In Lead Guerrilla terminology, the *Label* is the displayed name of the field on screen, and the *Alias* is the actual name of the field as stored in the system database. For each field you are importing, use the Custom Fields page to lookup the *Label*, then identify the corresponding *Alias* to enter as the column name on your CSV.

3.4 Companies

The Companies module is where you will keep the records for the Companies with which potential clients are associated. Once Companies have been defined, each Contact you add can have a Company associated with it. Notice in the sample data below how each Company has one or more Contacts linked to it.

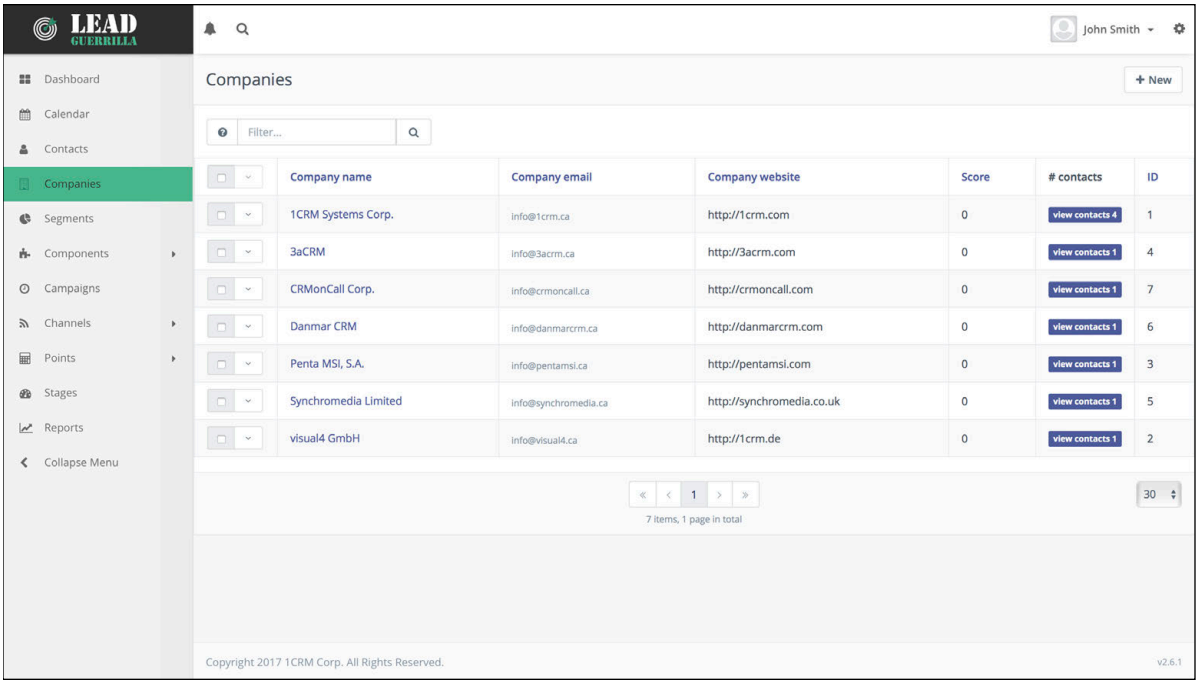

Figure 10: Lead Guerrilla - Companies List View

Use the + New button to add new Companies. In the List view you can select one or more Companies by clicking on the checkbox at the far left of each Company, and then Delete them using the *Delete Selected* option.

3.5 Segments

The Segments module is where you can organize your Contacts into groups - most often for the purposes of defining which Contacts will be the targets for which Campaigns.

Use the + New button top right to create a new segment. Enter a *Name* and *Description*, and set the toggle values for *Public* and *Published*. Then click on the *Filters* tab and define the conditions for Contacts to be included in this segment. For example standard Segments are defined which simply classify Contacts by Country into the Segments *Asia Pacific*, *Europe* and *North America*.

Note: Only *Public* segments are available on the *Unsubscribe* page, and only *Public* segments can be used in Campaign conditions. But any segment can be used as a Campaign source.

Note how easy and useful this is - you can group your Contacts simply by their properties - what country are they in, the value of an important custom field you create, anything. You can create multiple conditions, and *AND* or *OR* them to combine them. Look at the example Segments to see how it's done.

Not only do the filters you define for your Segments organize existing Contacts into these groups - the Segment definitions stay in effect, and any new Contacts that are added which match a Segment's criteria are also added to the Segment. If a Contact's data changes they may be added to, or removed from, each Segment as appropriate. (Changes in which Contacts belong to which Segments are performed by a Cron task which runs periodically, so they will not be instantaneous - think more like 10-15 minutes. Look for the *#Contacts* value to change by itself!)

Note: 1CRM users will see some similarities to *Dynamic Target Lists* in how Segments work!

As you run your marketing Campaign in Lead Guerrilla you may specifically assign Contacts to Segments - typically by using the Action *Change Contact's Segments* in the Campaign workflow. You can also manually assign Contacts to Segments. These sorts of changes are enduring - any contacts that were manually added will remain part of the Segment regardless of filters.

Any one Contact may belong to multiple Segments at the same time, and may gain or lose membership in specific Segments over time, as a Campaign workflow progresses.

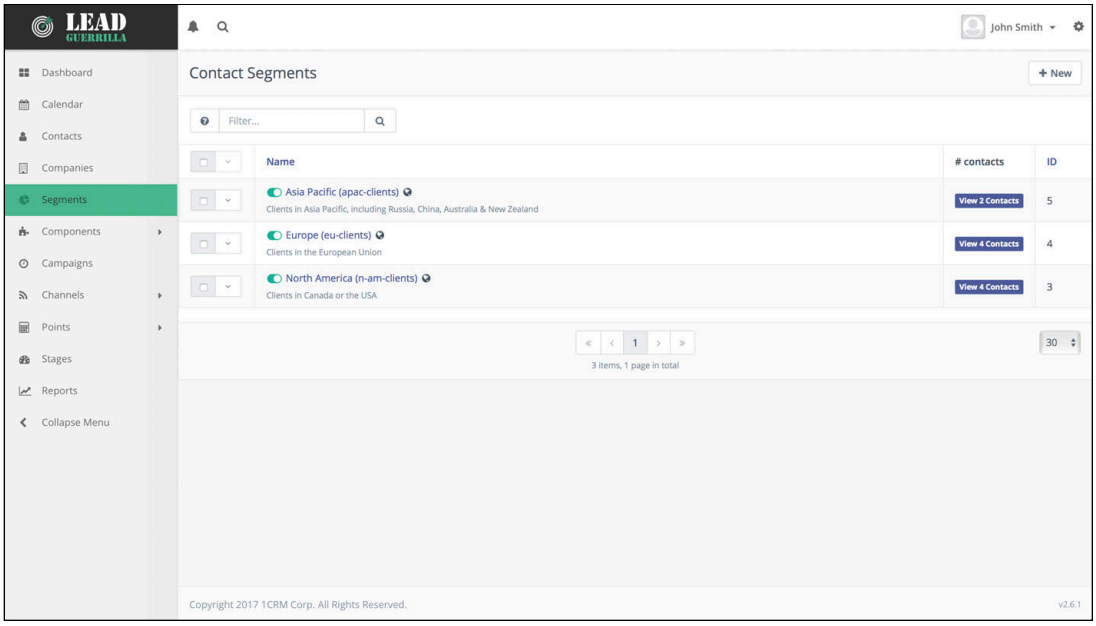

Figure 11: Lead Guerrilla - Segments List View, Showing #Contacts Per Segment

3.6 Components

The Components menu item is a dropdown control that reveals four types of Components:

1. *Assets* - these are usually images or downloadable binary files such as PDF, Word, Excel, ...
2. *Forms* - there are two kinds of forms: Campaign Forms and Standalone Forms
   - *Campaign Forms* can have 17 kinds of *Fields* added, as can *Standalone Forms*.
     - Captcha question
     - Checkbox group
     - Date
     - Description area
     - Hidden
     - List - Country
     - Number
     - Page Break
     - Password
     - Phone
     - Radio Group
     - Select
     - Social Login
     - Text
     - Text Area
     - URL
   - *Standalone Forms* can also have *Actions* added.

     Contact Actions:
     - Modify contact's tags
     - Remove Contact from Do Not Contact

     Asset Actions:
     - Download an asset

     Form Actions:
     - Post results to another form

     Email Actions:
     - Send email to user
     - Send form results
   - *Campaign Forms* can be selected as the contact source when building a campaign. All the actions for a form submission will be controlled by the *Campaign Builder*.
   - *Standalone Forms* are not limited to campaigns and can have post submit actions configured directly within the form.
3. *Landing Pages* - Landing Pages may be created either from scratch or by using predefined templates. Then use the page *Builder*, to edit your Landing Page and display data, utilize *Forms*, link to your *Assets*, and more. The { key is used to bring up a list of suggested variables which can be inserted.
4. *Dynamic Content* - these are customizable html snippets which may be pushed to the visitor's browser if they have agreed to receive notifications.

The four types of Components work together.

3.6.1 Assets

To create a new Asset, select Assets under the Components menu dropdown, and then click on the + New button top right. You can define the Asset as being stored locally within Lead Guerrilla, or remotely. If local, then you add the file using the file upload box as described there. Otherwise click on *Remote*, and enter a remote URL for the Asset. Either way, click Save & Close to save the Asset.

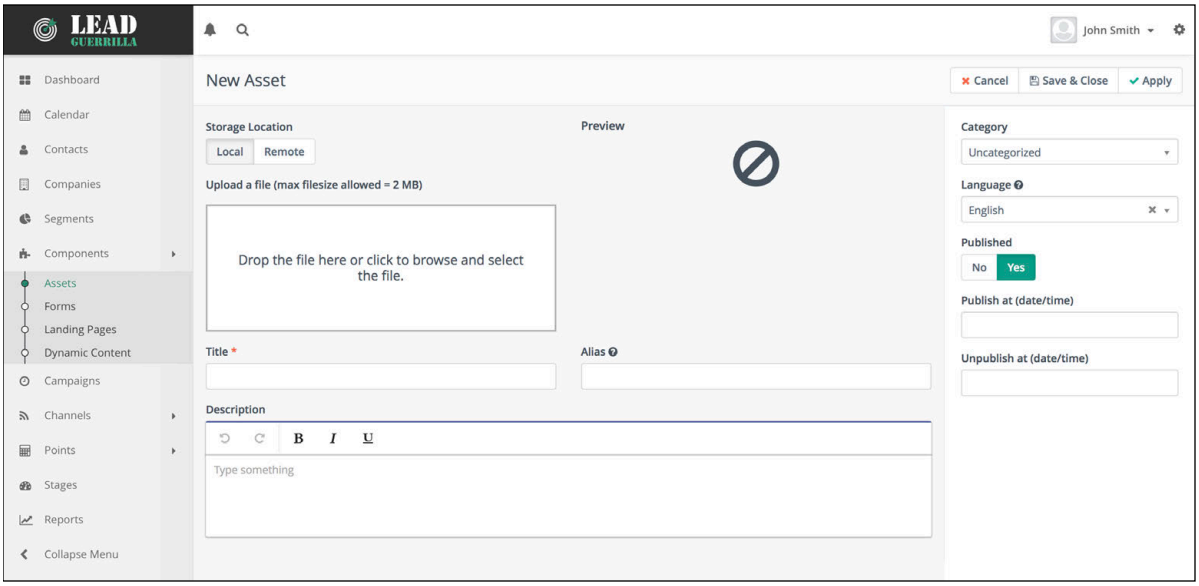

Figure 12: Creating a new Asset

Once an Asset has been created and published, Lead Guerrilla will track and chart how many times it is downloaded over time.

3.6.2 Forms

Forms are used to capture information from your visitors, and can be included in Landing Pages or any other section of your website. To create a new Form, select Forms under the Components menu dropdown, and then click on the + New button top right. You will see this popup menu:

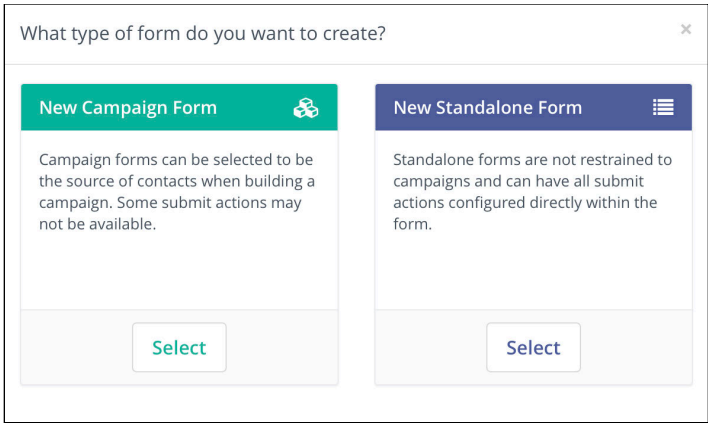

Figure 13: Selecting the New Form Type

Campaign Forms can have 17 kinds of *Fields* added, as can *Standalone Forms*, but only *Standalone Forms* can also have *Actions* added. In the Figure below we see the Creation of a new Campaign Form - note the tabs for *Details* and *Fields*. A *Standalone Form* also has a tab for *Actions*.

In either case the form needs you to enter a Name and Description. *Successful Submit Action* is a dropdown selection between:

- Remain at Form
- Redirect URL (Also requires entry of a redirect URL)
- Display Message (Also requires entry of a message to display)

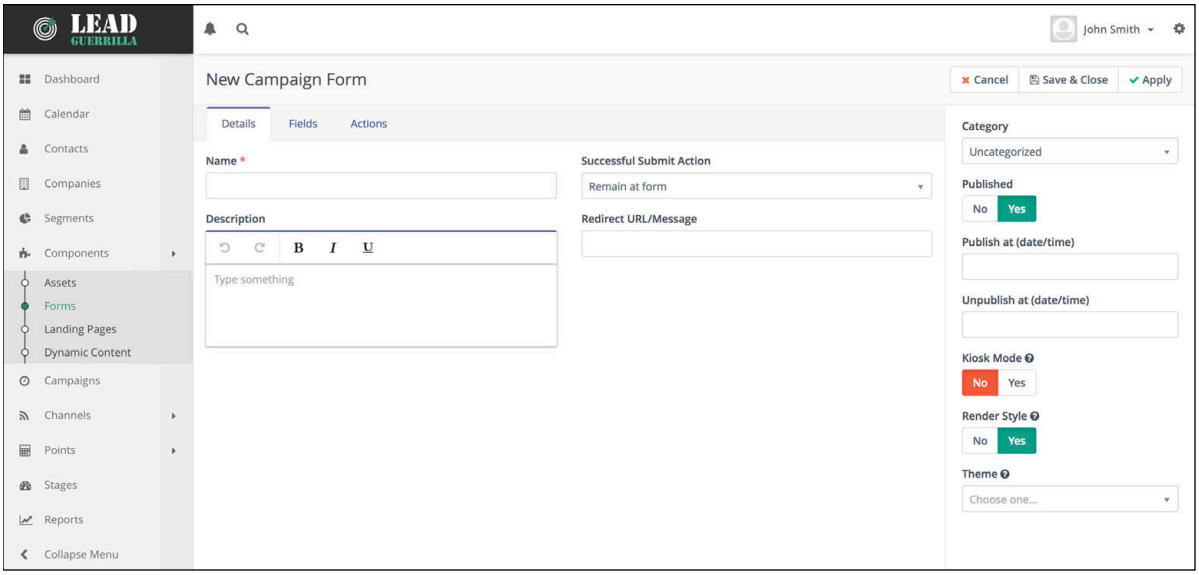

Figure 14: Creating a New Campaign Form

You will also need to select a *Theme* if the Form is to be integrated via popup or iframe directly into a webpage of a pre-existing website, rather than into a Lead Guerrilla Landing Page - to style the page containing the form. Then just click Save & Close to save the Form.

It's very simple to place a form inside a Lead Guerrilla landing page: just enter `{form` in the HTML where you want to place the form and a list of available forms will be displayed.

Each Form tracks all the *Results* it gets - where a result detail shows a full campaign workflow execution.

3.6.3 Landing Pages

To create a new Landing Page, select Landing Pages under the Components menu dropdown, and then click on the + New button top right.

You will need to choose a Theme from those displayed - even if it is just a Blank theme. Then set a page Title. Then click *Apply* to create the Landing Page. Now choose to either:

1) Click on the *Code Mode* theme and then on Builder to use the *Code Mode Builder* to directly edit the HTML content of the landing page, or
2) Simply click on Builder to use the visual *Landing Page Builder*.

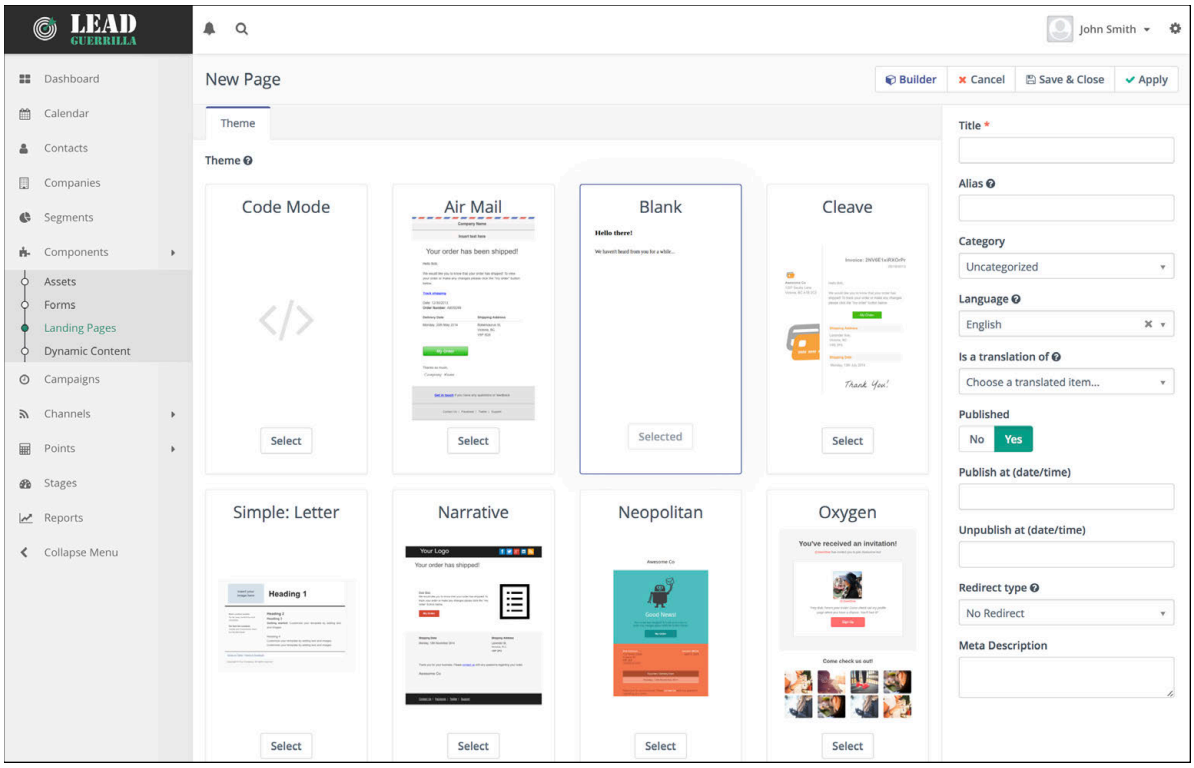

Figure 15: Creating a New Landing Page

Within the *Landing Page Builder*, simply drag the Text, Button, Image, Video, Social Share, Separator or other content options into 'slots'. Then you can customize layout for slots or sections within the page as well.

Each published landing page tracks the number of hits it gets.

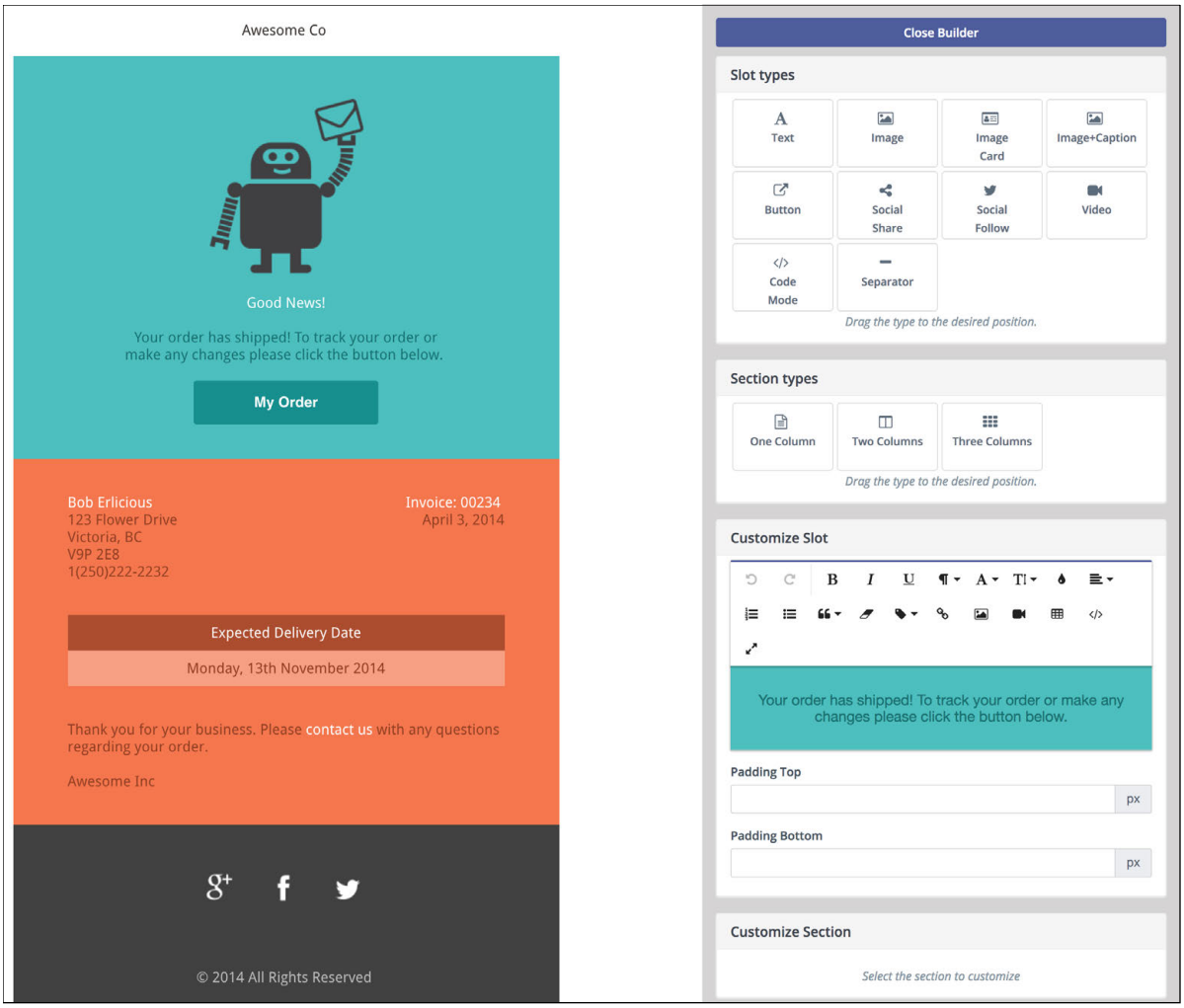

Figure 16: Landing Page Builder

Landing Page A/B Testing

As Landing Pages are so critical to your Marketing Automation success, Lead Guerrilla supports the ability to have two alternative versions of a Landing Page, and lets you pick a winner after using them both for a while. This process is called A/B testing.

To set it up, click on the *Create an A/B test* > link as seen below:

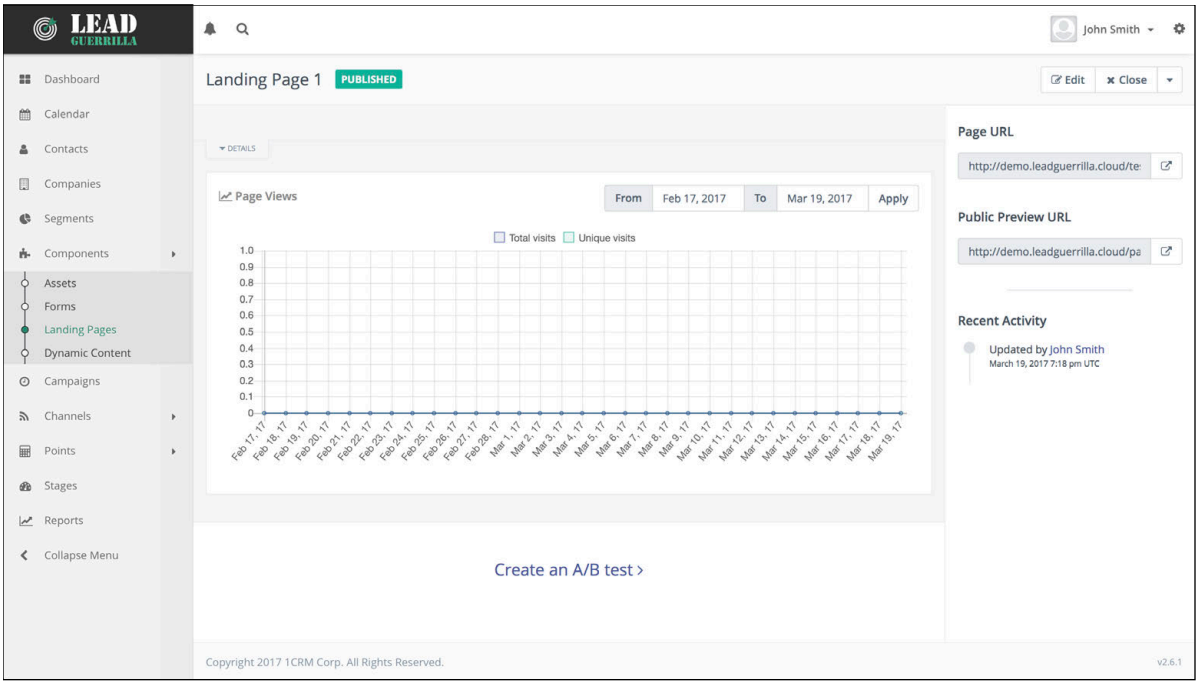

Figure 17: Landing Page - A/B Testing

This will lead you to create a new Landing Page which will have the original Landing Page as its Parent page. You will need to set the *Traffic Weight* for this variant - which will be the percentage of traffic to be shown this version of the Landing Page. And you need to set the *A/B Test Winner Criteria* dropdown value. Options are:

- Asset Stats: Download Rate
- Form Stats: Submission Rate
- Landing Page Stats: Longest Dwell Time
- Landing Page Stats: Lowest Bounce Rate

Lead Guerrilla will not automatically select the winning Landing Page, but it will show which page is winning based on the selected criteria, and allow the user to pick the final winner.

When a winning page is selected, the relationship of *Parent* page and *Variant* is split apart, and the Campaign will continue to work with the winning page.

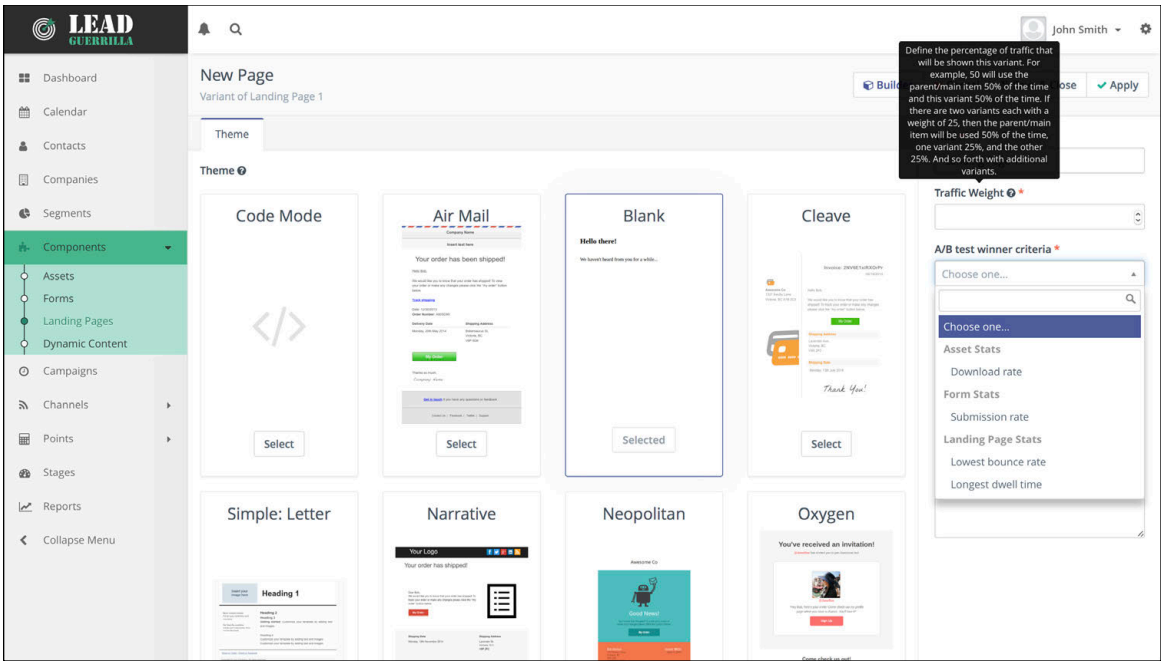

Figure 18: Landing Page - Variant Page

Landing Page Dynamic Content Usage

Dynamic content is content used on a Landing Page to present more personalized information to a visitor. As a simple example a Landing Page could show the text “Hello Samantha” at the top of the page, if Lead Guerrilla has identified the Visitor as a known Contact.

How does it work? Well - it’s a little complicated, so follow the next steps as closely as you can!

1. Create a new campaign such as the one shown below. Add a workflow *Decision* step that is a *Request Dynamic Content* box like the one highlighted below.

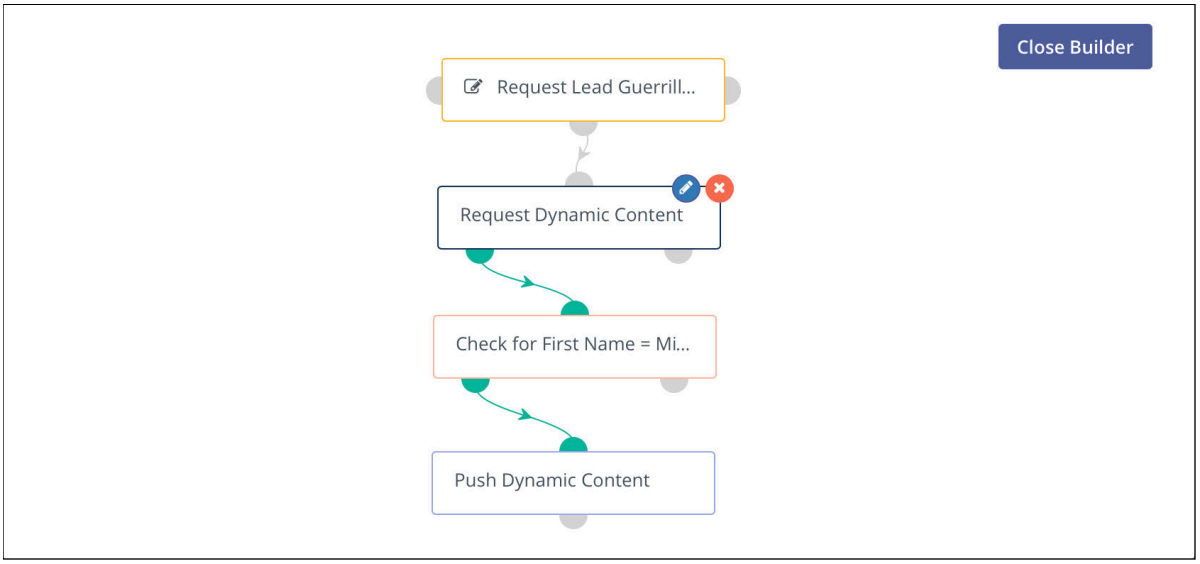

Figure 19: Create a Campaign for Dynamic Content Demo

2. You will need to provide a *Name* for this workflow step plus a *Slot Name*, and you'll need to choose a *Dynamic Content* item (or create one) to set the default value for this content. For *Slot Name* we can enter any name we like, then reference that specific *Slot Name* later on.

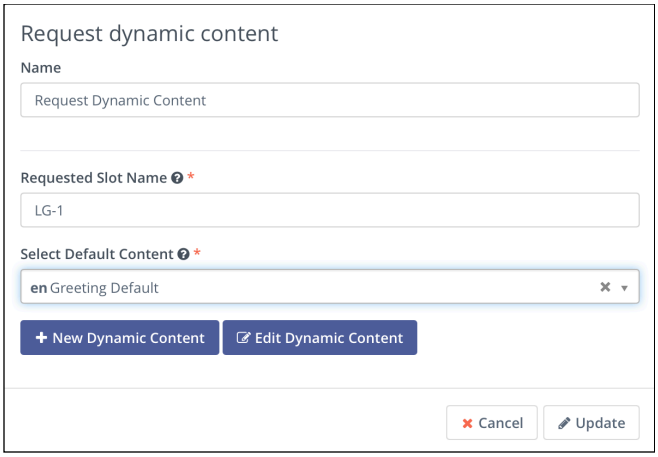

Figure 20: Adding a Step to Request Dynamic Content

3. The Figure below shows an example of a *Dynamic Content* item you could create and use as a default message to known Contacts visiting your page.

   Note: We use {leadfield=firstname} here to refer to a Lead Guerrilla field token. You can see a list of these by using Control+Spacebar in the Code Mode Builder while editing a Landing Page.

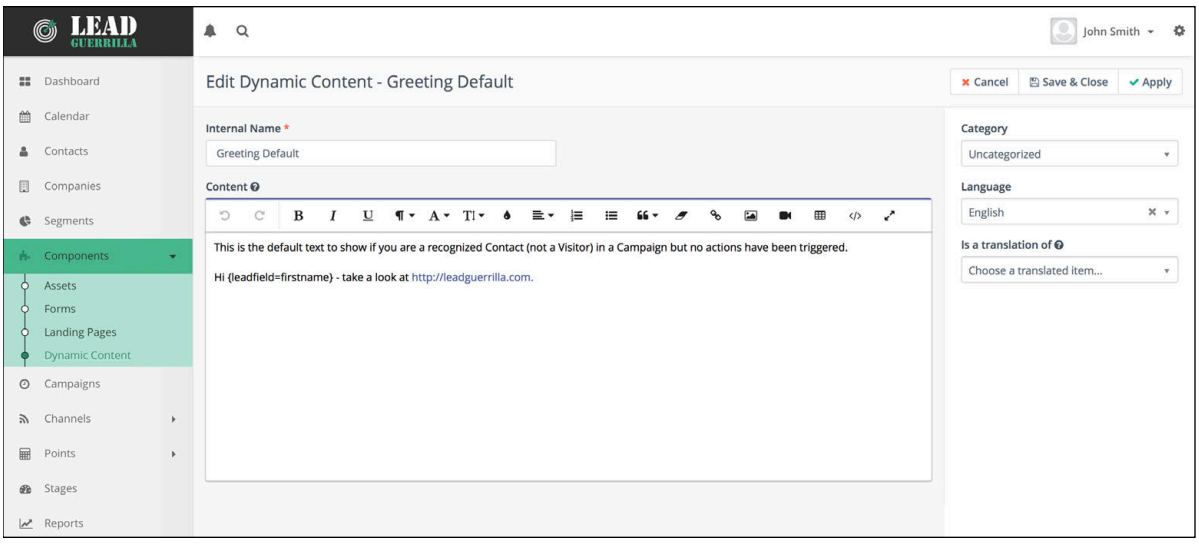

Figure 21: Creating a Dynamic Content Item

4. Next we create a Landing Page, or some other form of web page. The text below shows the *Code Mode* view of our sample Landing Page. Of critical importance to inserting Dynamic Content is the `Div` tag which has been highlighted.

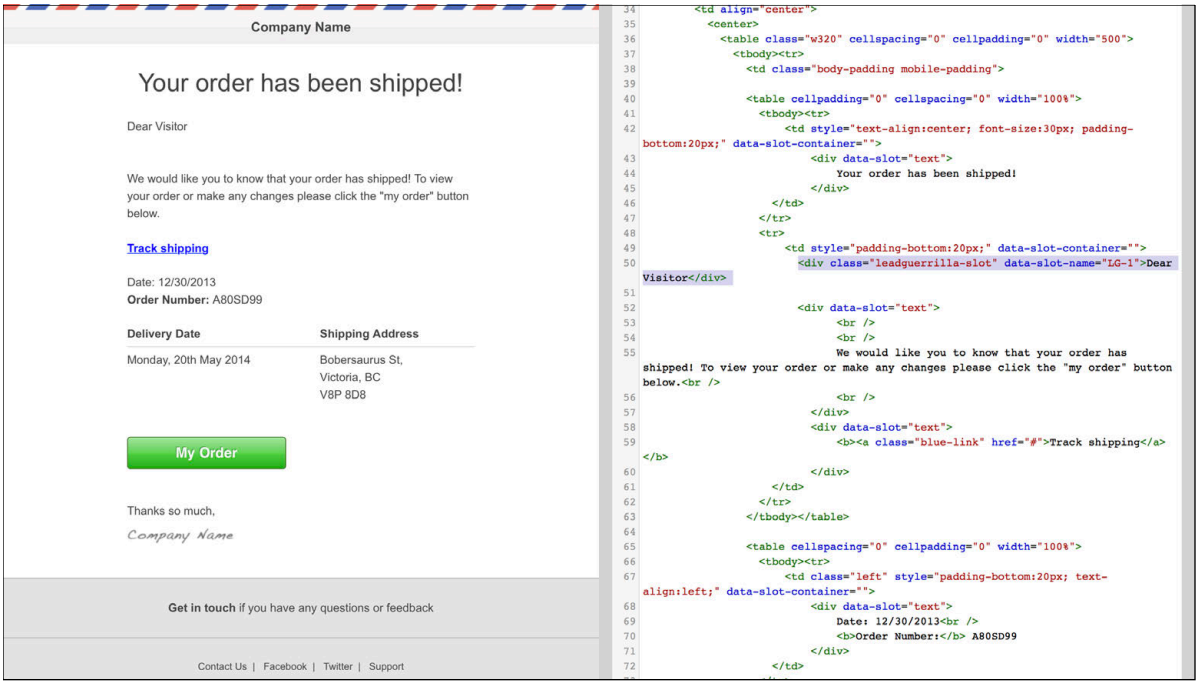

Figure 22: Landing Page - Code Mode View With Highlighted Div

Note: It is required that the class referenced in the Div should be `leadguerrilla-slot.` The `data-slot-name="LG-1"` is required, and must reference the *Slot Name* you initially provided above.

5. Next we create a Form. Note that this Form will be the Campaign Form that is used in Figure 19 above as the source of Contacts to be processed by that Campaign workflow.

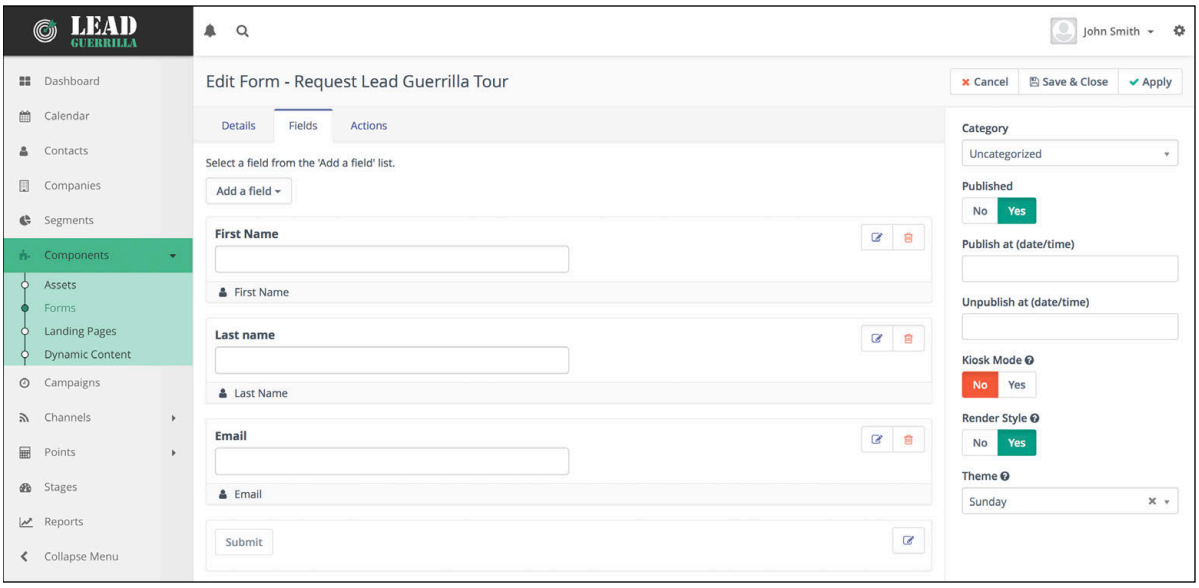

Figure 23: Create a Form

6. Now we can see that a visitor landing on the *Landing Page* containing that *Campaign Form* above will follow the Campaign workflow as shown in Figure 19. Following the *Request for Dynamic Content*, we see a Condition test on the Contact's first name. In this simple

Campaign Workflow we perform a *Push Dynamic Content* Action if the Contact's first name is Michael. We see below that this will push an alternative greeting to override the default value for the greeting set by the *Request Dynamic Content* step of the Workflow.

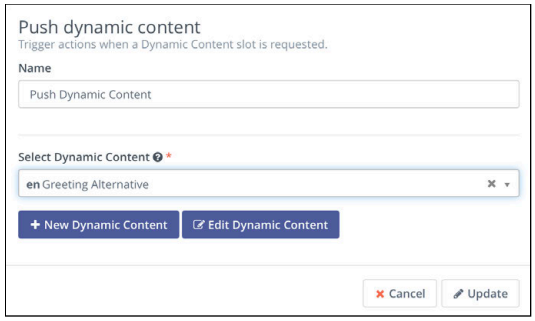

Figure 24: Push Dynamic Content

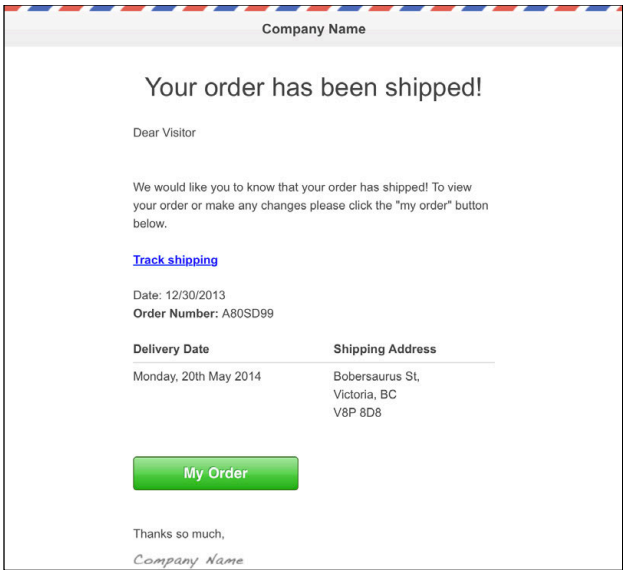

Figure 25: What the Visitor Sees

3.6.4 Dynamic Content

To create some new Dynamic Content, select Dynamic Content under the Components menu dropdown, and then click on the + New button top right. You simply enter a name, and the HTML content itself, as shown in Figure 21 above. Then click Save & Close to save the Dynamic Content.

Once some Dynamic Content has been created and published, Lead Guerrilla will track and chart how many times it is viewed over time.

Web Notifications, Using Dynamic Content

One common use for dynamic content is for visitor Web Notifications on various pages of your website. Web Notifications are explained in detail later on, in the section dealing with Campaigns.

Note: Web Notifications require your site to have an SSL certificate installed, and also require that the visitor agrees to receive Web Notifications from your site.

3.7 Campaigns

The Campaigns module is the most important part of your Lead Guerrilla system. In this section we will show you how to create a campaign, and make it active. Once you do that, your marketing automation system is up and running and creating new leads for you!

The core of the **Campaigns** module is the *Campaign Builder* - a graphical way to define a new campaign workflow. You simply add *Contact Sources*, *Actions*, *Decisions*, and *Conditions* into a Campaign workflow diagram to graphically design a campaign workflow.

3.7.1 *Contact Sources*

These let you select source of the Contacts that enter a Campaign Workflow:

- Campaign Forms: Contacts created from submissions for the selected forms will be automatically included in this campaign
- Contact Segments: Contacts that are members of the selected Segments will be automatically included in this campaign. (Any segment can be used here, not just *Public* segments)

3.7.2 *Actions*

Actions let you choose what actions to perform as part of a Campaign Workflow:

- *Add to Company's Score*: Add the specified value to the Company's existing score
- *Add to Company Action*: Add Contacts to the selected Company
- *Adjust Contact Points*: Add or subtract points for the Contact
- *Change Campaigns*: Add or Remove Campaign associations for Contact
- *Change Contact's Stage*: Change Contact's Stage to any other value
- *Modify Contact's Segments*: Add or Remove Contact's membership in any Segments
- *Modify Contact's Tags*: Add or Remove tags from Contact
- *Push Contact to Integration*: Push a Contact to the selected integration
- *Push Dynamic Content*: Push Dynamic Content to a slot in content requested by a Contact (only available after a Request Dynamic Content)
- *Send Email*: Send the selected Email to the Contact
- *Send Marketing Message*: Send a Message through the configured Channels within the Marketing Message selected
- *Tweet Contact*: Sends Tweets Automatically to Contacts (***Note:*** Must comply with Twitter's Automation Rules)
- *Update Contact*: Update fields in the Contact record with specified values

3.7.3 *Decisions*

These allow you to trigger workflow *Actions* based on the actions of your customer Contacts. Each *Decision* box on your workflow diagram will have a *Yes* (green) and *No* (Red) link.

- *Downloads Asset:* Trigger action on download of (any or selected) assets

- Opens Email*:* Trigger action on opening email (should follow a Send Email Action)
- *Request Dynamic Content*: This is the top level for a Dynamic Content request
- *Submits Form*: Trigger action on Form Submission (any or selected)
- *Visits a Page*: Trigger action on Webpage Visit (Requires a tracking pixel)

3.7.4 *Conditions*

These allow you to trigger *Actions* based on the properties of your customer Contacts, or data values in a form they have submitted. Each *Condition* box on your workflow diagram will have a *Yes* (Green) and *No* (Red) link.

- *Contact field value*: Condition based on a Contact field value
- *Contact owner*: Condition based on a Contact's owner
- *Contact segments*: Condition based on a Contact's segments (Public segments only)
- *Contact tags*: Condition based on a Contact's tags
- Form Field Value: Trigger actions when a submitted form has a field value that matches the defined condition

3.7.5 *Creating a Campaign*

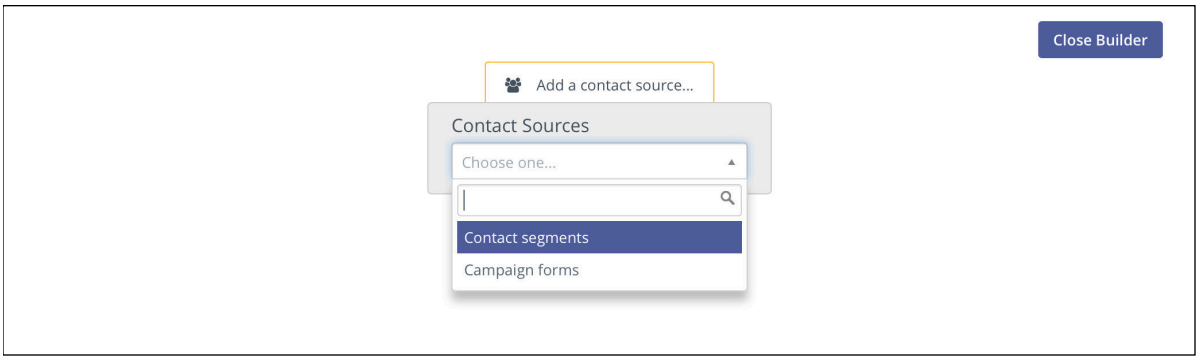

Figure 26: Campaign Builder

Now - let's create our first Campaign!

1. Click on *Campaigns* in the Lead Guerrilla menu system. You may see a list of existing Campaigns, but for our purposes here, click on + New in the top right corner.

2. Enter a *Name* and *Description* for your new Campaign, and perhaps choose a Category, then click on Launch Campaign Builder near the top right. Your screen will resemble the Figure above.

3. Next we choose the source of the Contacts that will enter our Campaign Workflow. We will choose a Segment in this case - a selected group of our existing Contacts. (We could have also chosen a Form, which would pass along new Contacts as they fill in that Form.)

4. We chose the Segment *North America,* as seen in the Figure below. Click on the grey semi-circle at the bottom of the yellow box for North America. Now the system is encouraging us to add the next step in our Workflow - a *Decision*, *Action* or *Condition* to be selected from the options listed on the previous page.

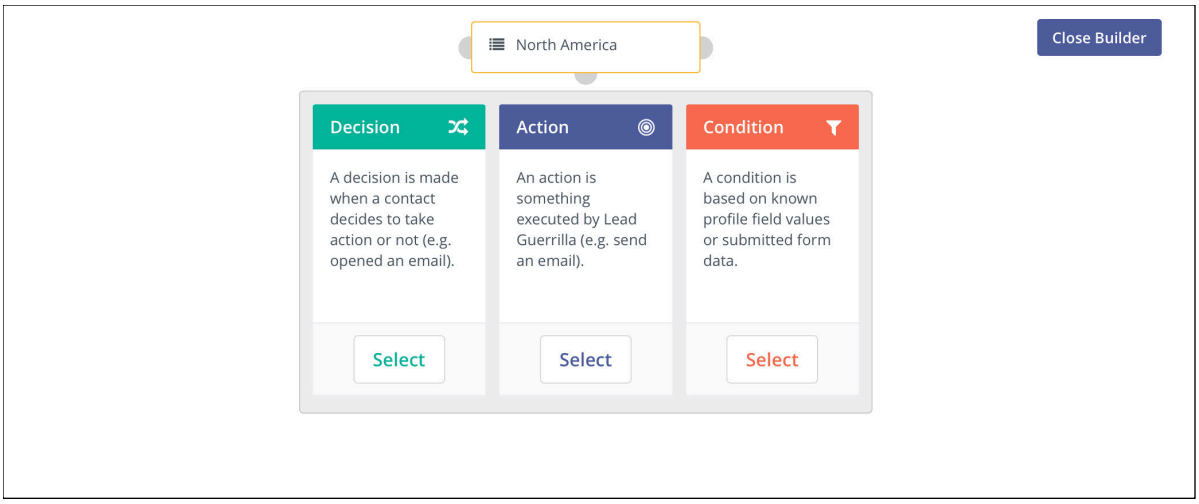

Figure 27: Creating a New Campaign

5. Let's choose an Action - sending an Email - and choose which email to send, when to send it, and what to call this step of your Campaign. You'll see these steps in the Figures below.

6. Click on + New to save your new Action, and your Campaign diagram now has two boxes!

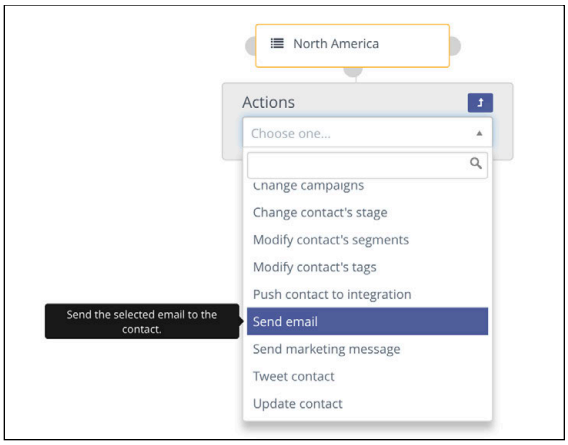

Figure 28: Choosing an Action

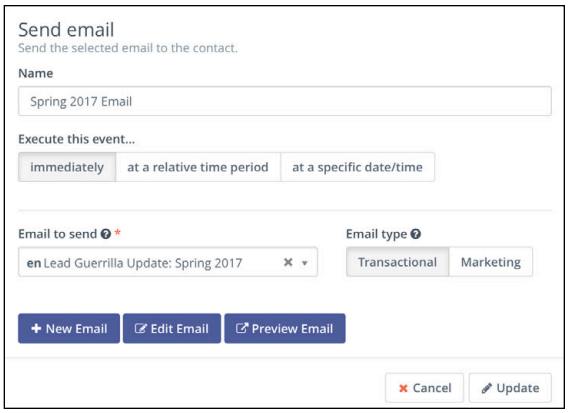

Figure 29: Completing Email Action Popup

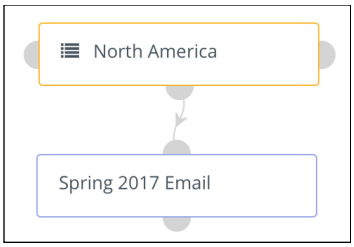

Figure 30: Our Campaign is Growing!

7. You have now joined these two workflow steps. All the Contacts you have in North America will now be sent the Spring 2017 Email. Note that while all we did here was send the new Contact an Email, by using other *Actions* we could have added points to their *Score*, added them to some specific *Segment*, sent them a Tweet, changed a field in their Contact record, etc..

8. Next let's drag in some Decisions (Green boxes): Add three Decisions - *Downloads Asset, Submits Form,* and *Opens Email*. After each Decision, add an Action (Blue box) to increase the Points score for the Contact. And also connect another Action - *Send Marketing Message* - to the *Submits Form* Decision, with a 2-day time delay.

9. Finally let's add in a Condition after the *Downloads Asset* Decision - based on *Contact Field Value* - and check the Country field of the Contact. And add in an action after that as well - *Send Marketing Message,* if the country is Canada. Once you have entered these, saved them off, and connected them up, your Campaign should look like this:

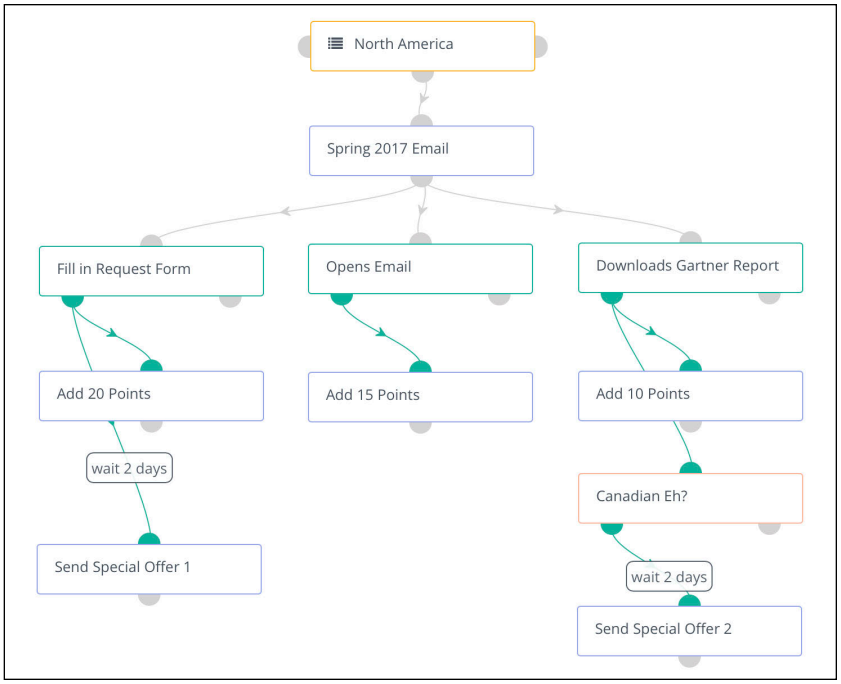

Figure 31: Editing Campaign - Final Appearance

10. You now have a simple Campaign that emails all North American Contacts, then adds different points to their Score depending on if they fill in a Form, Download a file, or just Open the Email. Then depending on what they did, sends them Marketing Messages of special offers.

Just click on the Close Builder button top right, toggle *Published* to Yes, and then click on Save & Close. Your Campaign screen will now list the various *Decisions*, *Actions*, *Conditions* and *Contacts* linked to your Campaign.

You should now have a reasonable understanding of how Lead Guerrilla Campaigns work, and how you create them. To learn more, the easiest way is to examine some of the example Campaign templates included with Lead Guerrilla, and perhaps clone and modify them to build up just the workflow process you want.

One key principle you should study from those example Campaign templates is delayed Actions. In the Figure below, we see the Action is no longer to be performed *When Triggered*, but instead the system is told to *Wait* for a number of Minutes, Hours, Days, Months or Years before performing the Action.

Another key principle is this: If a contact joins a Campaign (by submitting a Form or entering a Segment), and then later on exits the Campaign (because their Segment associations changed, or because they were explicitly removed from the Campaign) - they cannot re-enter the campaign.

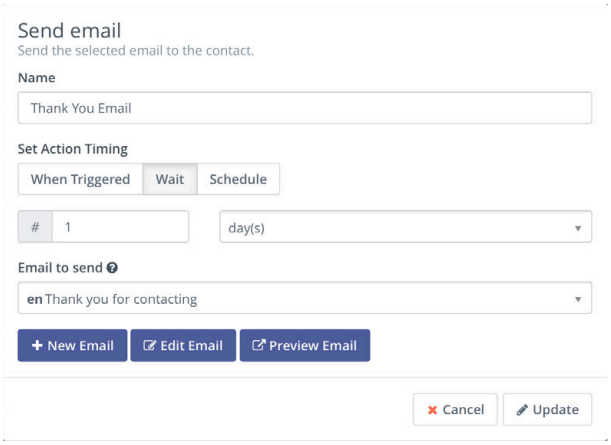

Figure 32: Editing Campaign - Delayed Actions

Using Tracking Pixels or Javascript Tracking to Detect Page Visits

If you wish to use a *Decision* item on your Campaign workflow, to detect when a Contact *Visits a Page*, you will want to make sure that the URL you want to trigger on contains a tracking pixel, or Javascript tracking.

This may be accomplished in *Wordpress, Joomla!, TYPO3* or *Drupal* through the use of an available plugin, or in other systems by inserting a snippet of code. (See the section on Contact Monitoring.)

Email Address Validation

Lead Guerrilla has the ability to validate email addresses, before attempting to send emails to them. Currently accuracy is above 90% of invalid email addresses detected. This is of quite critical importance:

- Not to use up valuable Lead Guerrilla Contacts with visitors with bad email addresses;
- Not to trigger warnings with your email provider, and incur unneeded costs with them;
- Not to skew your Campaign results - you want your results to relate only to emails sent to valid email addresses.

3.8 Channels

The Channels menu item is a dropdown control that reveals up to five options:

Marketing Messages

- Create cross-Channel messages - for Email, Texts, Tweets and Web Notifications..

Emails

- Standard Emails to be used in Campaigns may be developed from scratch, or by selecting from existing Templates and using the same Builder tool used for Landing Pages.

Web Notifications (if enabled)

- Create Web Notifications that work via the OneSignal service.

Text Messages (if enabled)

- Compose Text Messages for sending via the Twilio service.

Social Monitoring (if enabled)

- Create Social Activity Monitors, based on Twitter mentions of a topic, or a specific hashtag.

3.8.1 Contact Preferences: Channels, Categories & Unsubscribe

To understand Marketing Messages (the first of the Channels we will explain) first we need to discuss *Contact Preferences*.

When managing a Contact you can set the Contact's preferences for how you communicate with them. You can access the Contact's preference center when viewing a Contact's profile. From the dropdown menu top right click on the *Preferences* menu option, as shown below:

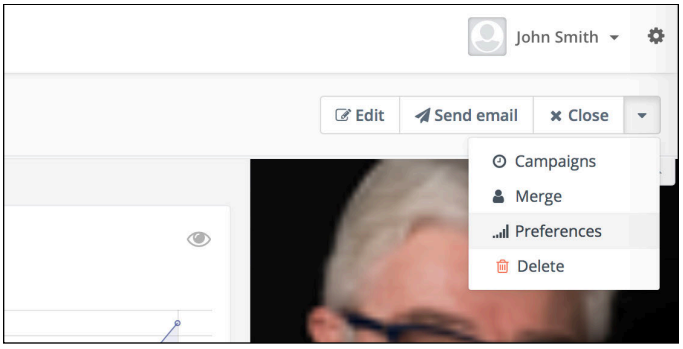

Figure 33: Contact Preferences Menu Selection

A new popup window should appear with three tabs, the first of which enables you to set the preferred channels and frequency of communication for this Contact, as well as the option to pause communication for a period of time. The second tab enables you to add or remove the Contact from Categories. The third tab allows you to manage the Contact's membership in Segments.

Preferred Channels and Frequency

The *Channels* tab (see Figure below) offers *Email* and *Text Message* checkboxes (Text Messages only if the *Twilio* plugin is configured and enabled) to enable/disable these channels of

communication. You will also notice a Radio button to the right of each, which enables you to indicate the *Preferred* channel for this Contact (email for this Contact). As well, you can set the maximum communication *Frequency* for each channel. In the Figure below we see the communication frequency is limited to *2 Emails / Week*, and *1 Text Message / Month*. Lastly you can define a *Pause* in communication - what you might call a communications embargo. This client is embargoed from receiving any emails for the months of March and April.

To set a contact preference for *Do Not Contact* through this channel simply un-check the checkbox for that channel name - *Text Message* or *Email*.

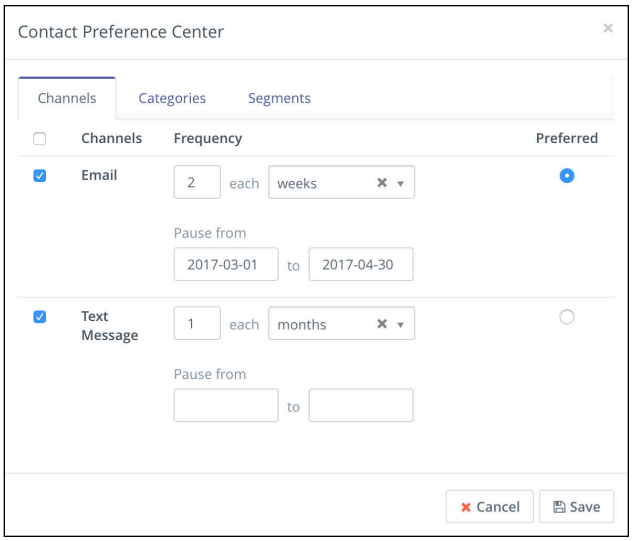

Figure 34: Contact Preference Center

Contact Categories

Use the *Categories* tab to add or remove a contact from a Category. Global Categories can be used in areas like *Emails*, *Text Messages*, and *Campaigns*. In combination with the *Subscribed Categories* Segment filter, Contacts can be given the choice to opt out of categorized communications.

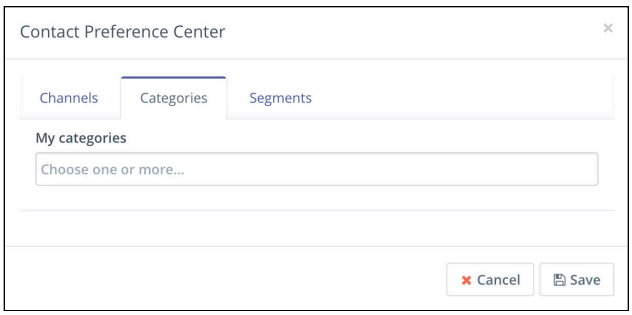

Figure 35: Contact Categories

Contact Segments

Use the *Segments* tab to add or remove a Contact from a Segment. Segments are used as a source for Campaigns and Emails. Any Contact in a particular Segment will part of a Campaign that has that Segment as the source. You can also send a standalone email manually to a Segment. If a user has

opted out of a Segment it will no longer receive Campaign Actions or Messages sent to that Segment.

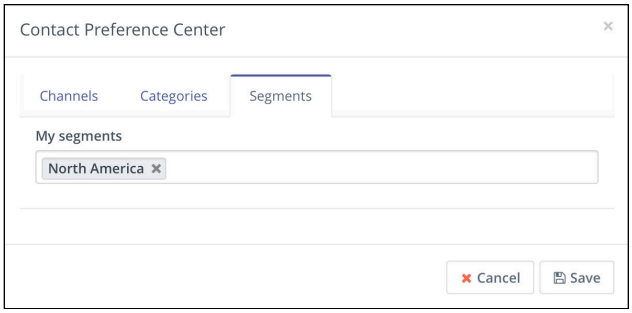

Figure 36: Contact Segments

Contact's Unsubscribe Email Preferences

The Contact's detailed communications preferences can be presented to them on the *Unsubscribe / Message Preferences* page by selecting *Show contact preference settings* in the email configuration tab within Configuration. You may also choose to hide or show different aspects of the user preferences. If any of the options such as Sho*w contact frequency preferences*, or *Show contact's categories* is set to *No*, it will hide that information from the Contact's unsubscribe page.

The minimalist default *Unsubscribed confirmation message* is shown if the *Show contact preference settings* option is set to *No*. The HTML entered in the *Text for the {unsubscribe_text} token* field is what will be shown in your emails when using the `{unsubscribe_text}` token in your email templates.

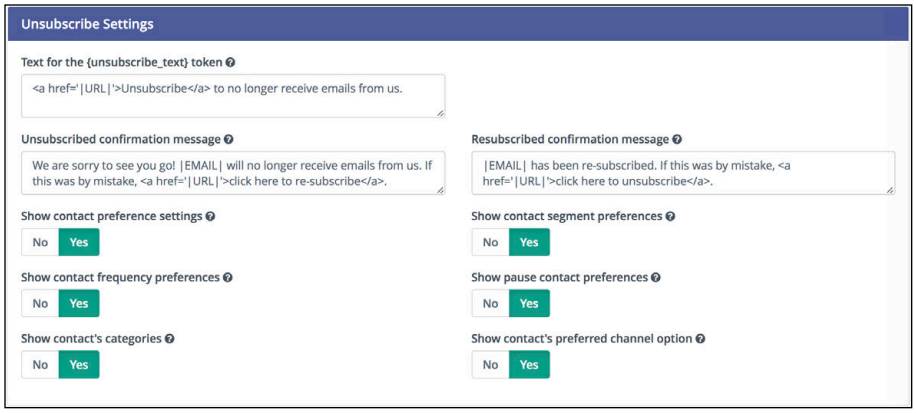

Figure 37: Contact Unsubscribe Email preferences

3.8.2 The Lead Guerrilla Unsubscribe / Message Prefs Page

Figure 37a below shows an example of an unsubscribe page as shown to a client when they click on the unsubscribe link in an email to them. In this example the business running Lead Guerrilla has the Twilio plugin enabled and configured, so text messaging options are offered. The *Show contact's preferred channel option* setting is also enabled (see above), as is *Show contact's categories*, and all the other options shown above - so the maximum level of detail is shown to the client, resulting in a fairly busy page. Figure 37b shows a simpler page with fewer details enabled.

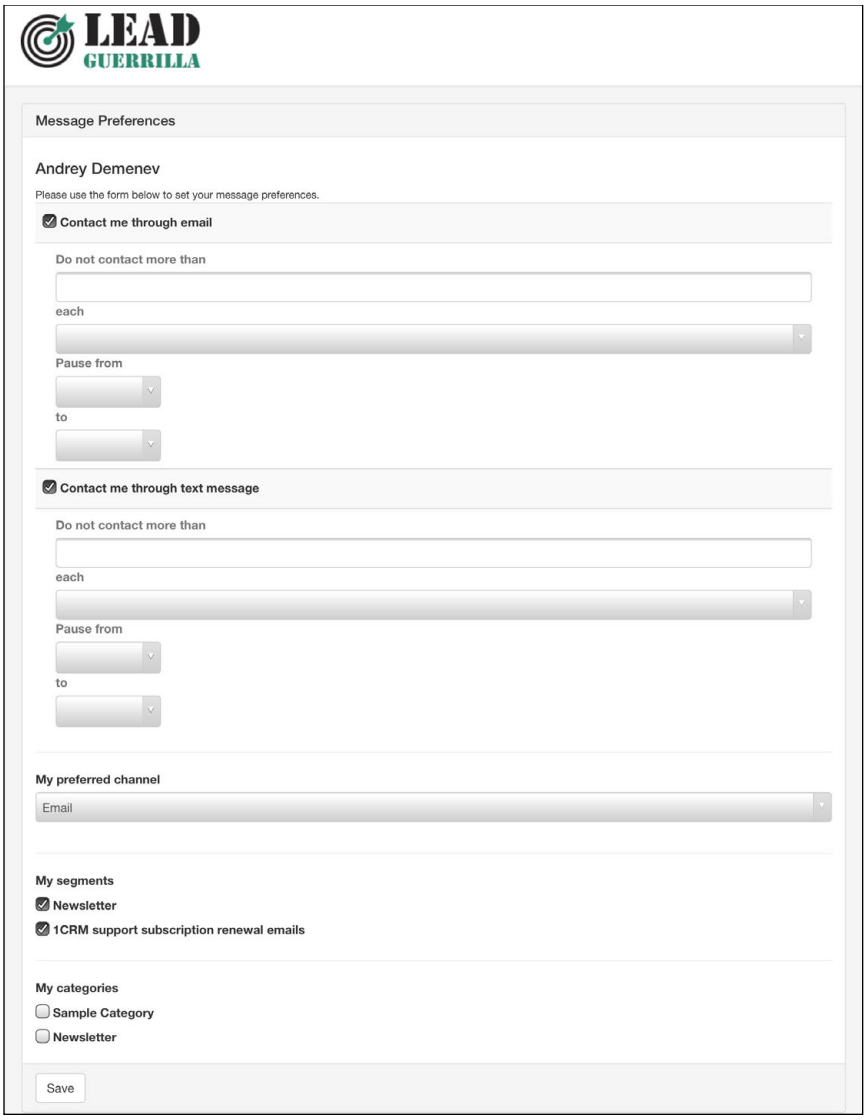

Figure 37a: Detailed Unsubscribe / Message Preferences Page

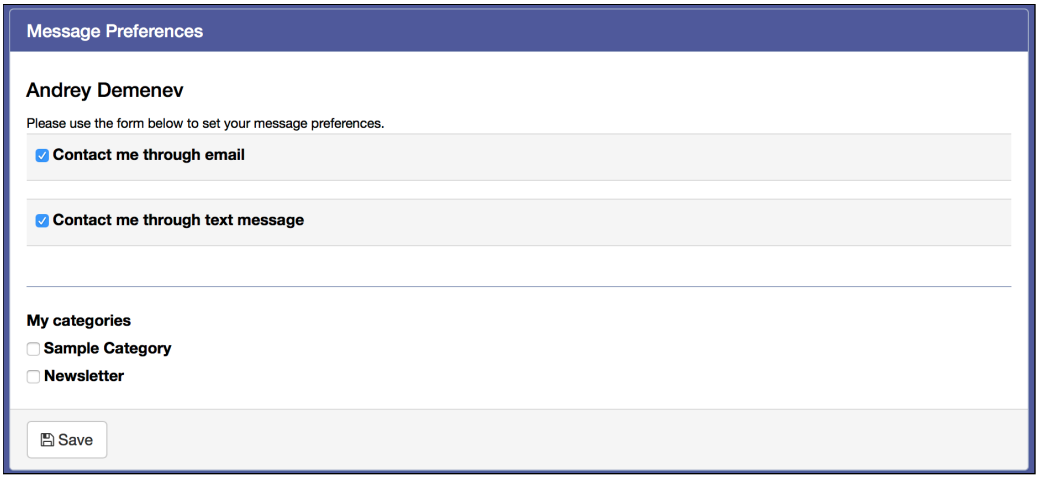

Figure 37b: Simple Unsubscribe / Message Preferences Page

The *Unsubscribe / Message Preferences* page is generated using a special *Themable Unsubscribe* Theme. This Theme cannot be used for normal purposes such as Emails or Landing pages. To customize the unsubscribe page seen by your clients when unsubscribing or managing their *Message Preferences*, click on the ⚙ icon top right, and select *Configuration* from the Settings menu, then click on the tab for *Themable Unsubscribe Page*.

When enabled, the *Themable Unsubscribe Page* allows your system admin to define custom CSS rules which will control the look of the unsubscribe page as seen by your clients (such as Figure 37a). You can add your own logo, and theme the page with your company colours if desired. When disabled, clients will see a more generic version of the page, such as seen in Figure 37b (just as long as *Show contact preference settings* is enabled, in the email configuration tab within Configuration).

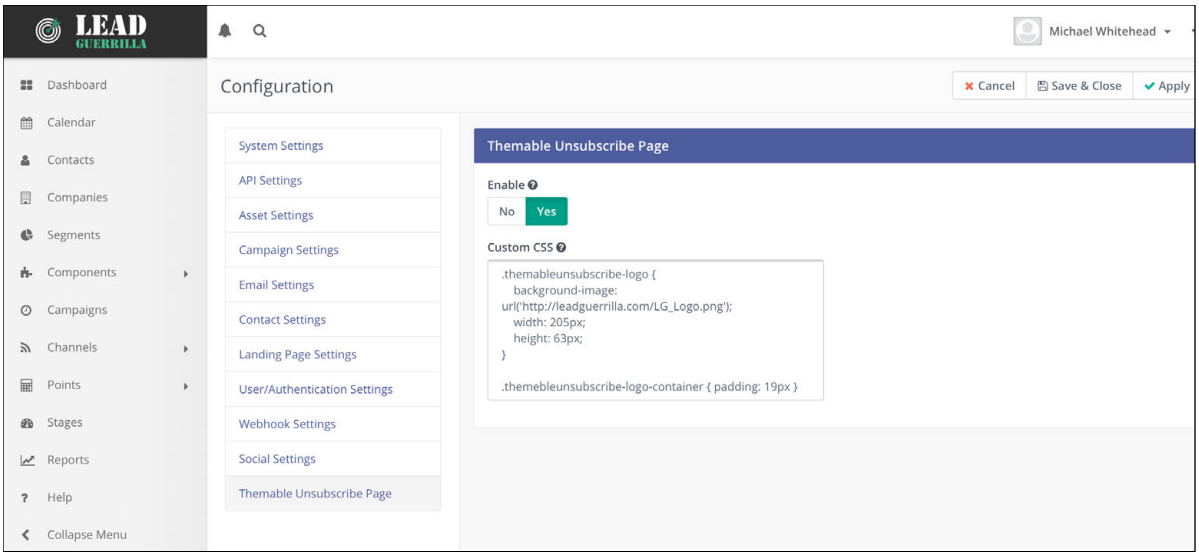

Figure 37c: Customizing the Unsubscribe / Message Preferences Page

3.8.3 Marketing Messages

A *Marketing Message* differs from an Email in that it defines a message for each of several Channels - not just Email. To create a new Marketing Message, select *Marketing Messages* under the *Channels* menu dropdown, and then click on the + New button top right.

As you can see in the Figure below, you can define versions of your Marketing Message for each of up to four Channels - *Email*, *Text Message*, *Tweet* and *Web Notification*. Yes, we said *up to four*, as there are considerations which may reduce that number:

- On the tab for each Channel, there is a toggle to set it as Enabled - *Yes* or *No*. In the Figure below we see the tab for Email, which is Enabled.
- Other than Email, the other three Channels will not even show as tabs here, unless your administrator does some initial work to set them up.

When a Campaign executes, and a *Send Marketing Message* Action is being processed, Lead Guerrilla's behavior is controlled by a combination of the settings shown in Figures 38 and 34 - the Contacts Preference settings and the actual content of the Marketing Message. The rules are as follows:

- The message will only be sent via one Channel.

- If a Contact has no Preferences, Email is the default.
- If the Contact has a preference for Texts over Emails, then if both exist in the Marketing Message, the Text message will be sent.
- If a Contact has exhausted their Frequency limit for both *Email* and *Text Messages*, or both are set to *Do Not Contact* (checkbox not checked) the system automatically moves on to look if the message has any content for the *Twitter* channel, and then the *Web Notification* Channel.
- If Email is set as the preferred channel, if the same message is set for both Email and Text Message, it will only send the Email version of the message to the selected Contact.

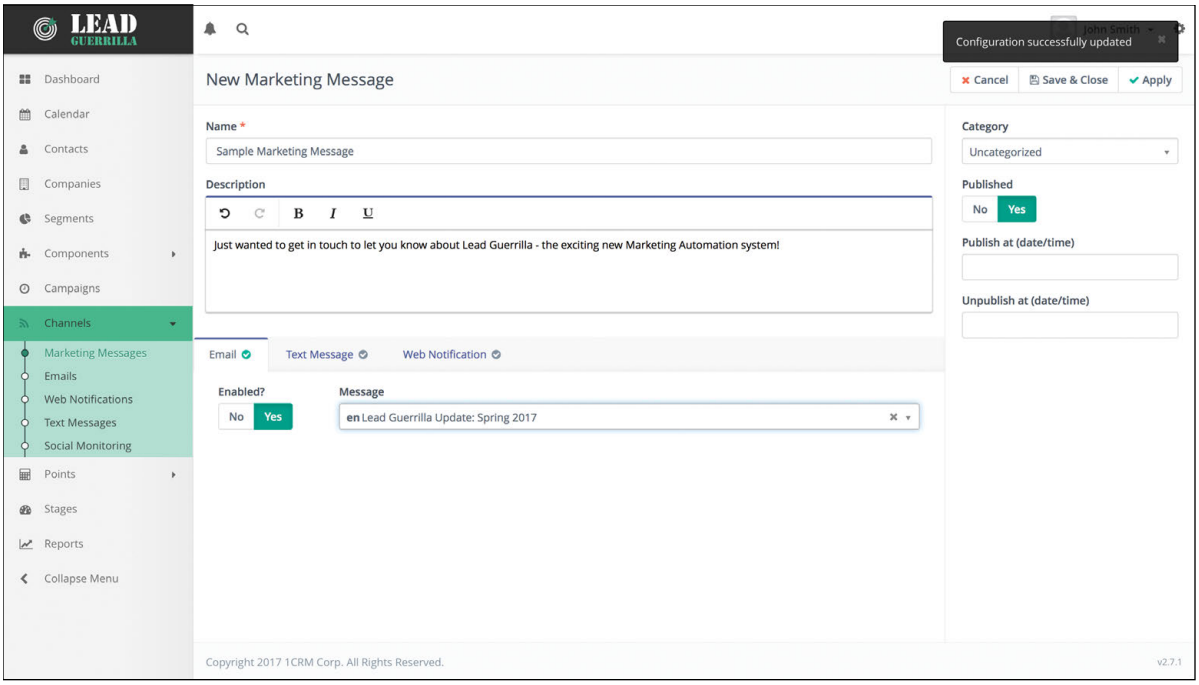

Figure 38: Creating a Marketing Message

3.8.4 Configuring Text Messaging Via Twilio

Before you start to send Text Messages from Lead Guerrilla, it needs to be connected to the service which can send them. Currently the only service we support to do this is Twilio. In order to configure the Text Messages correctly, follow these steps:

1) Create an account at Twilio.com.
2) Within Twilio, go to *Account Settings*. There you'll see the *API Credentials*.
3) Open Lead Guerrilla in another browser tab and click on the ⚙ icon top right, and select *Plugins* from the Settings menu. Click on the *Twilio* icon on that screen.
4) Copy the *AccountSID* from your Twilio account and paste it into the *Account SID* field on the first tab in the popup dialog.
5) Unlock and copy the *AuthToken* and paste it into the *Auth Token* field in the same popup tab.
6) Go to *Products > Phone Numbers* in Twilio, copy your phone number and paste it into the *Sending Phone Number* field on the Features tab of the popup.

7) If you wish, set the option for *Do not send text messages more often than* xxx Days / Weeks / Months.

8) Enable the *Published* switch on the first tab of the popup, and click Save & Close.

9) You will now see *Text Messages* listed under Channels in the Lead Guerrilla menu.

3.8.5 Configuring Twitter Using the Plugin

You can use the Twitter Plugin for Lead Guerrilla to display all the tweeting activity for a Contact, as long as you add their Twitter handle to their Contact profile.

You can also send tweets to Contacts, using either the *Tweet Contact* action in a Campaign, or as part of a Marketing Message definition.

Using this plugin will enable you to place a share button on your Landing Pages as well.

If you wish to have these capabilities available to you, you will need to configure this plugin.

Let's begin by opening up the Lead Guerrilla Plugin for Twitter. Click on the ⚙ icon top right, and select *Plugins* from the Settings menu. Click on the *Twitter* Plugin on that screen

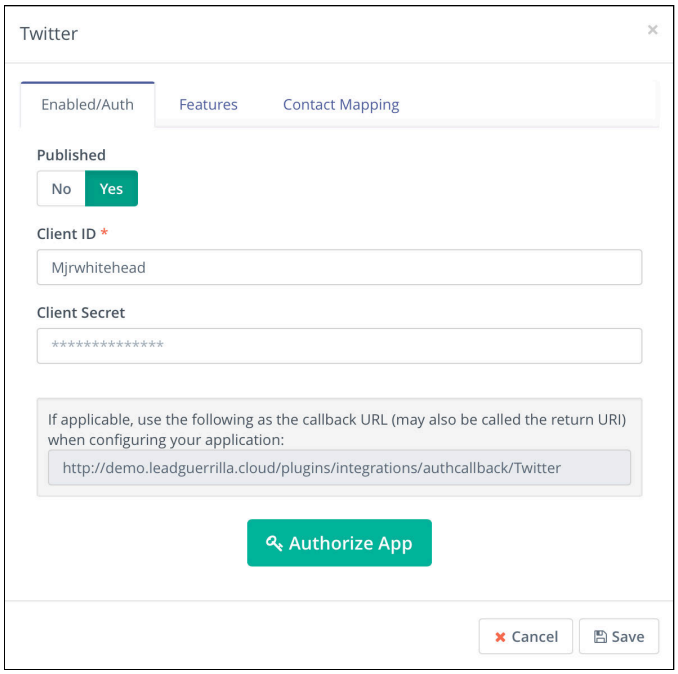

Figure 39: Twitter Plugin Authorization

Authorize the plugin

A Twitter application has to be created for authorization. To create/manage one, go to apps.twitter.com. While creating your Twitter app, you'll have to insert a *Callback URL*. This callback URL is visible in the Twitter plugin configuration as shown above.

When your Twitter app has been created, copy the *API Key* to the *Client ID* field in Lead Guerrilla's Twitter configuration and *API Secret* to *Client Secret* field. Click the *Authorize App* button.

Don't forget to switch *Published* to *Yes* and then *Save* the configuration.

Configure the plugin

Next you need to configure the *Features* and *Contact Mapping* tabs in the Twitter Plugin. The *Features* tab is fairly self-explanatory.

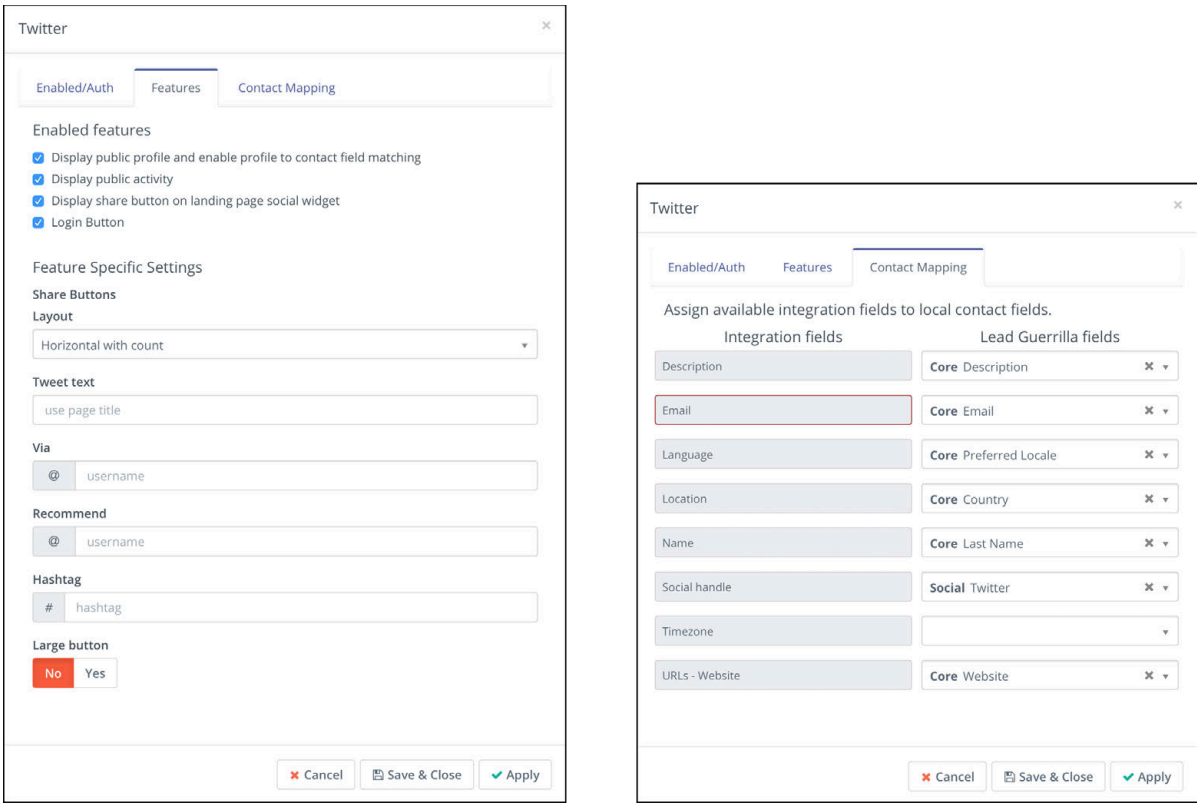

Figure 40: Twitter Plugin Features & Contact Mapping

The Contact Mapping tab is the list of available fields from an integration. Select the Lead Guerrilla Contact Field equivalent for each field from the dropdown list provided. You don't have to map every field. Map only those you want to use with the integration.

The tweets of a Contact should appear on the Contact's profile as soon as the Twitter handle contact field is filled with an existing Twitter handle.

Use the {sharebuttons} token in your Landing Pages where you want to include the share buttons.

3.8.6 Configuring Web Notifications Via the OneSignal Plugin

Web notifications integrate the OneSignal service. Using your own OneSignal account, you can push a notification to a visitor's browser (with their permission). Enable these in Lead Guerrilla's Configuration to see them listed under Channels in the menu.

1. Create a OneSignal account and then create a new app of any name - perhaps you might call it LeadGuerrilla. Follow the rest of their instructions here to configure Website Push for Chrome, Firefox and Safari.
2. *Setup Lead Guerrilla* - In Lead Guerrilla click on the ⚙ icon top right and select *Plugins* from the Settings menu. Then click on the OneSignal icon. Set *Published* to Yes on the first tab of the resulting popup dialog. Next copy information from OneSignal into the fields on the first

tab as shown in the Figure below. (***Note:*** gcm_sender_id is a shared key used for push notifications. Use the default value of 482941778795.) On the Features tab choose which options to enable, then click on Save & Close.

3. *Test* - All visitors with supported browsers will be asked to receive notifications on all your Lead Guerrilla landing pages. Create a Campaign and use the *Send Web Notification* action.

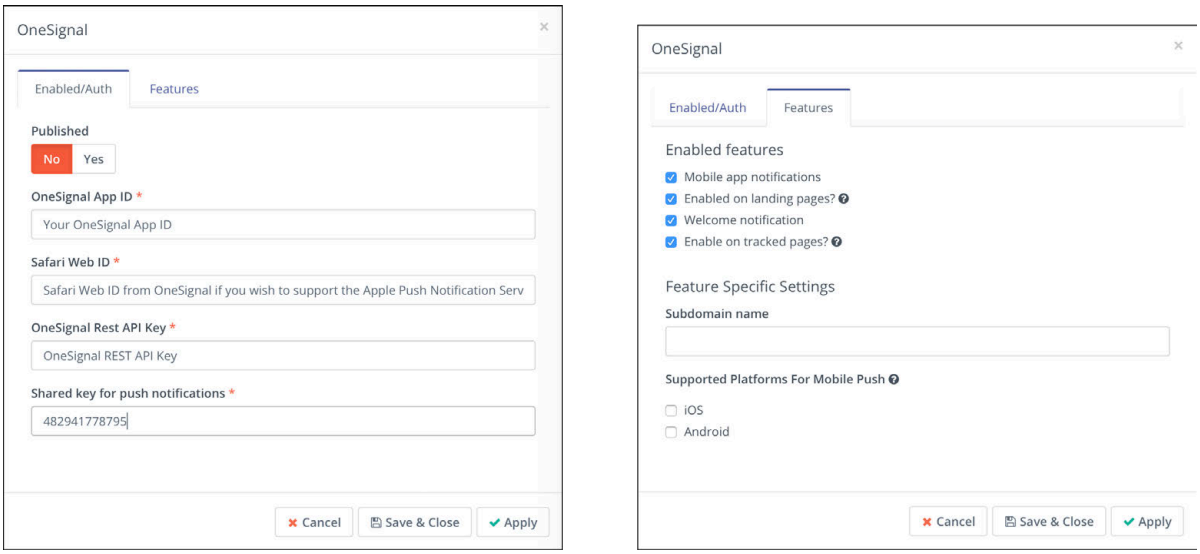

Figure 42: OneSignal Plugin for Lead Guerrilla

3.8.7 Emails

To create a new Email, select *Emails* under the *Channels* menu dropdown, and then click on the + New button top right. Then you will need to select one of:

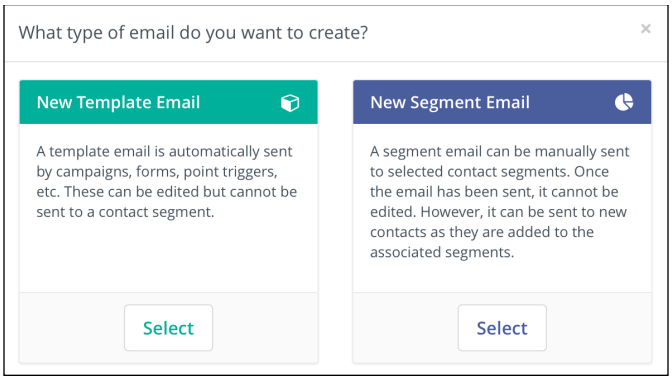

Figure 43: Creating a New Email

Most commonly, you will create Template Emails. Just as with Landing Pages, you can select a Template (or a blank Template) - and you can use the Builder tool or edit manually using *Code Mode*. On the Advanced tab you can add email attachments, and set other email-specific values including a plain text version. Once you're all done, just click Save & Close to save the new Email.

Tips for Editing Emails (& Landing Pages)

To create a new email template in Lead Guerrilla simply select Emails from underneath Channels in the main menu. In the popup window, choose to make a New Template Email, then click on the + New button top right and you come to this screen:

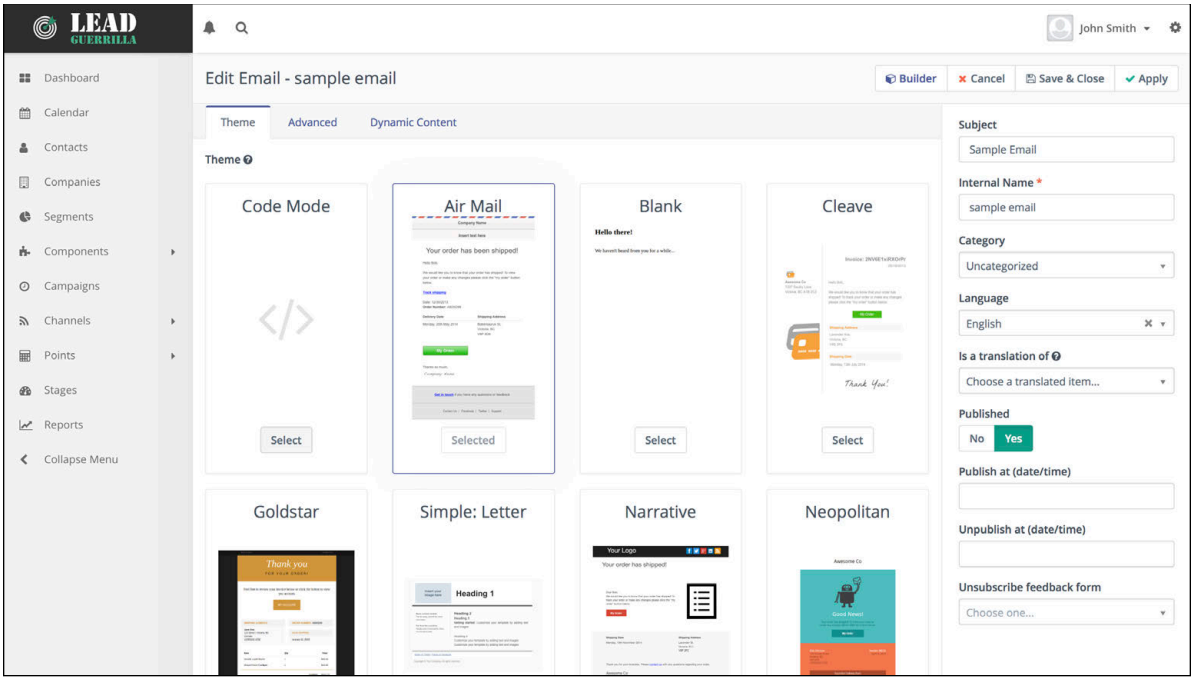

Figure 44: Creating a New Email

Click on the Select button below your favourite Template - even if that is just the *Blank* template. Enter a *Subject* and an *Internal Name* for your Email. Now you have a choice of two ways to edit your email template to become just what you want. You can use the normal *Builder*, or the *Code Mode Builder*.

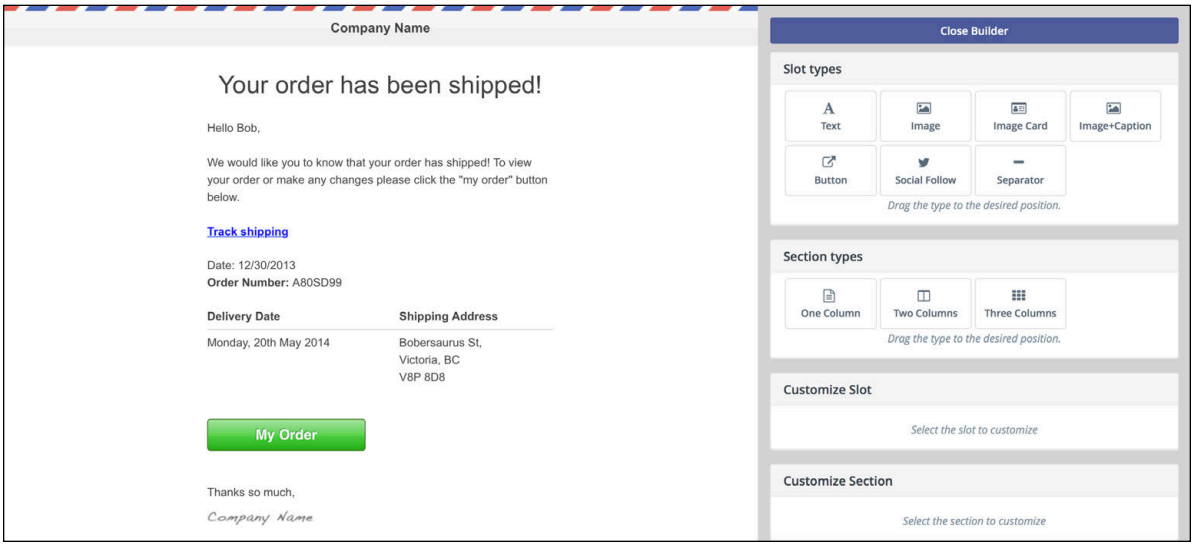

Figure 45: Normal Builder

The Builder

To use the regular Builder, then just click on Builder right away after choosing your template and setting the *Subject* and *Internal Name*. You'll see a screen like the one above.

The regular builder is basically a simple editor to let non-technical users create or edit an email template by using the buttons you see on the right side of that screen for *Slot Types* and *Section Types*, and to Customize the contents of these Slots and Sections. To use the buttons for *Slot Types* and *Section Types*, simply click and drag one onto the left hand window and drop it where you would like it to be.

The Figure below shows an example of Customizing a Slot - just click on any slot on the window on the left and the Customize Slot panel springs to life. The Figure below also shows how to insert a field token when customizing a slot - just type { and you will be prompted with a dropdown selection of the available fields.

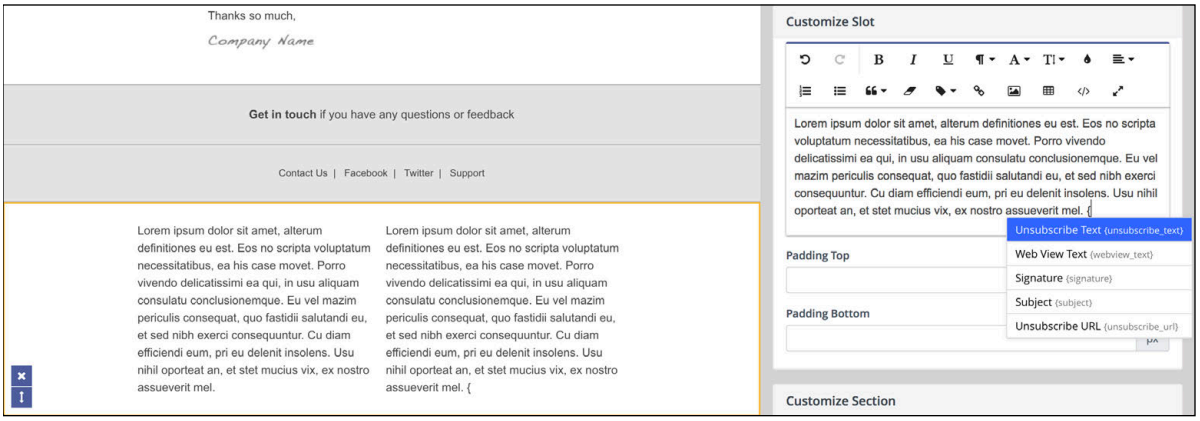

Figure 46: Customizing Slot Contents in the Builder

One control in the Customize Slot editor's *Icon Bar* is of particular interest. The </> Code View button toggles on and off a small HTML editing view:

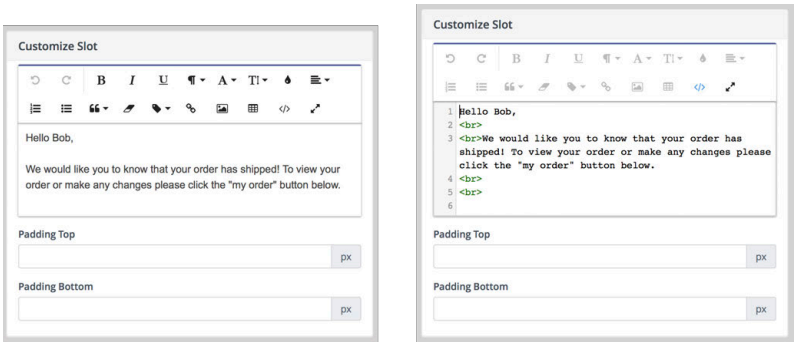

Figure 47: Code View HTML Editor in the Builder

Code Mode Builder

To use the Code Mode Builder, first click on the Select button under the (pretend) Theme *Code Mode*. You'll see a Warning popup:

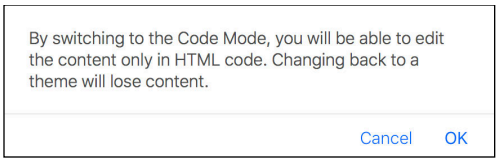

Figure 48: Code Mode Warning

As the warning states - switching to Code Mode is something of a one-way trip. Yes, you can switch back to your regular theme - but you will lose all the changes you have made in Code Mode.

For now, click on *OK* to accept this condition, then on Builder. You'll see a two-panel screen like this:

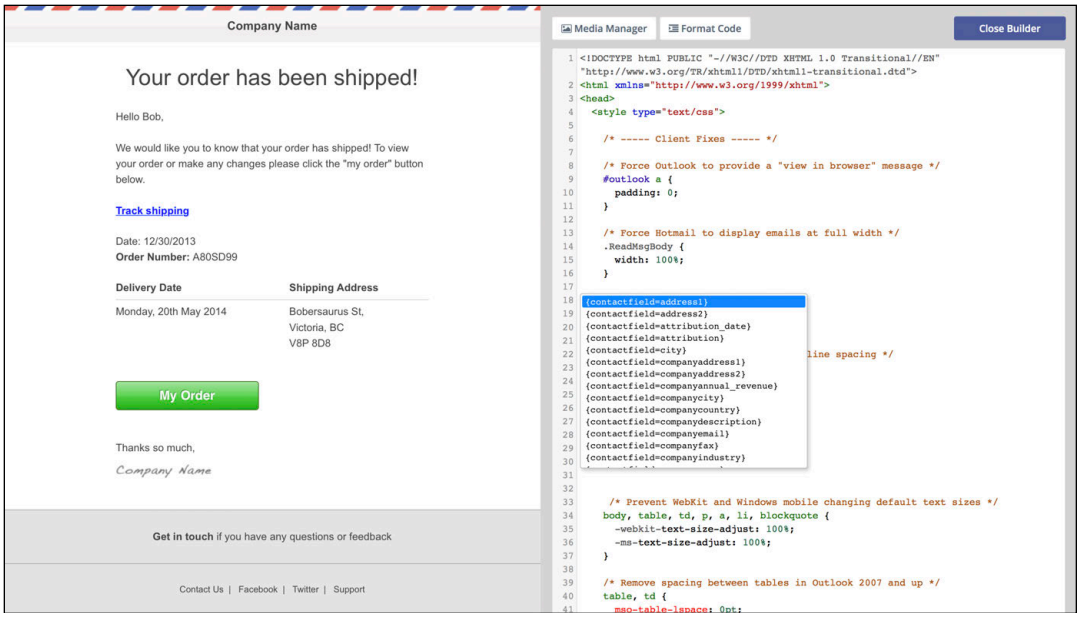

Figure 49: Code Mode Builder

The Code Mode Builder shows a preview of your Email (or Landing Page) on the left, and the HTML code for it on the right. You can also enter any field token by typing *Control+Spacebar*, as shown above. If you like you can even copy the HTML out of this window and edit in another HTML editor, then paste it back here.

3.8.8 Web Notifications

Web Notifications can be created and edited easily via the menu system, once they have been enabled via the OneSignal plugin.

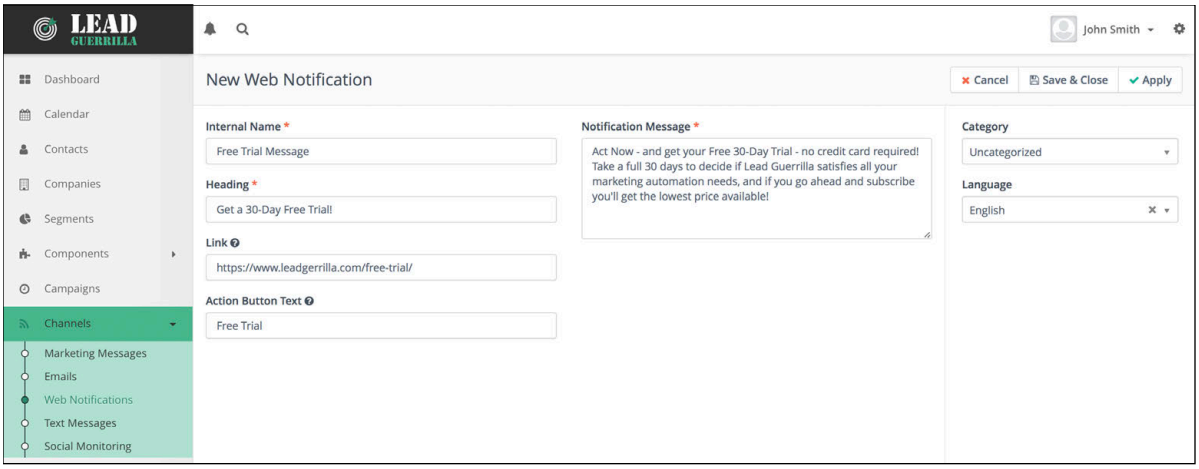

Figure 50: Creating a New Web Notification

3.8.9 Text Messages

A Text Message can be created/modified easily via the menu system, once Text Messages have been enabled via the Twilio plugin.

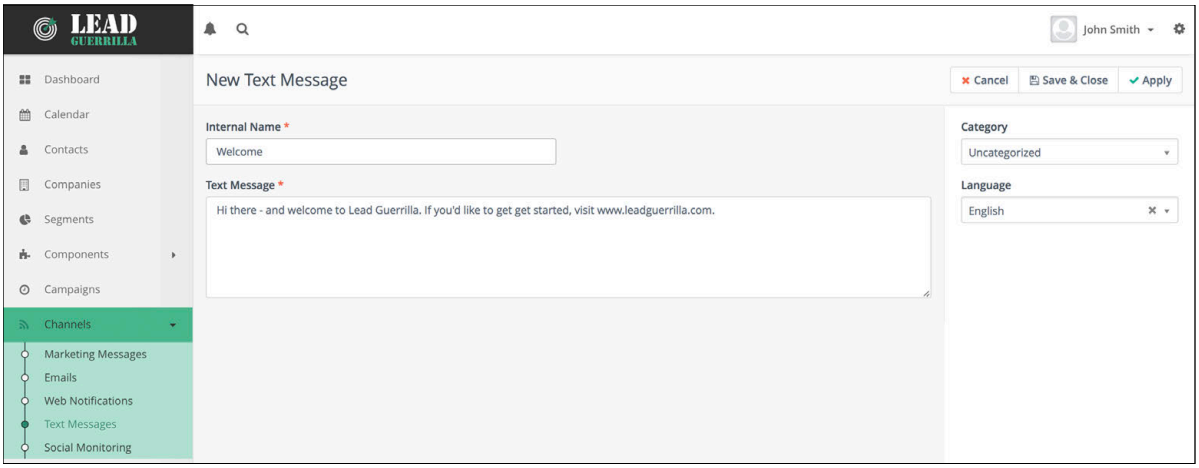

Figure 51: Creating a New Text Message

3.8.10 Social Monitoring

To create a new Social Monitor, select *Social Monitoring* under the *Channels* menu dropdown, and then click on the + New button top right. Enter a *Name* and *Description*, and a *Monitoring Method* (one of *Twitter Mention*, or *Twitter Hashtag* - see the Figure below) and set the toggle value for *Published* and click Save & Close to save the new Monitor.

Once the new Monitor is live it will accumulate Contacts linked to the Monitor, and track Tweets per day on a chart.

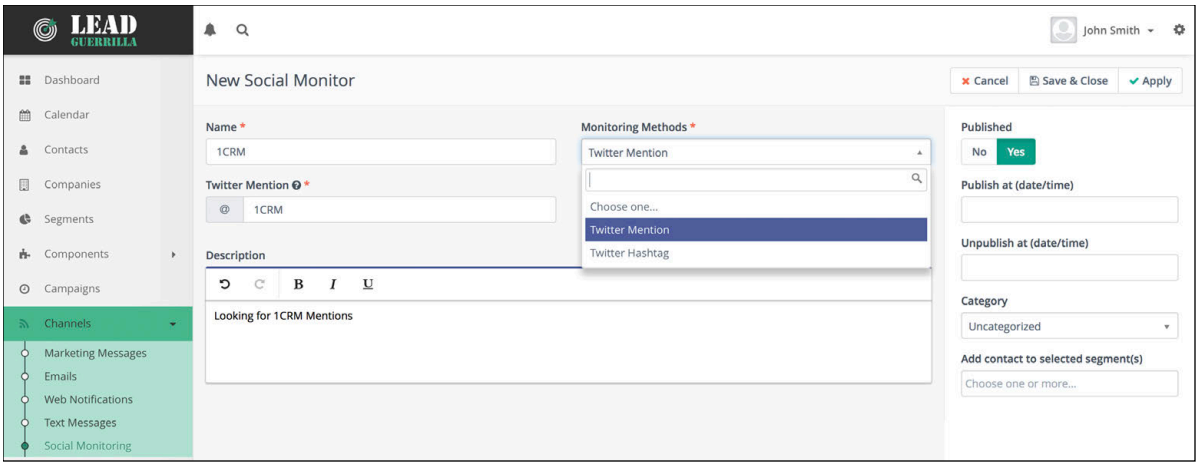

Figure 52: Creating a New Social Monitor

3.9 Points

Within the Points menu item, Lead Guerrilla lets you define Actions and Triggers which together determine your lead scoring system. Lead Guerrilla can see when prospects download files, open emails, browse to specific web pages, submit web forms or even join in a website chat - and all these actions can be used to change the prospect's lead score. High scoring leads can be highlighted for sales attention.

The Points menu item is a dropdown control that reveals two options:

Manage Actions

- Points Actions are defined as changes (plus or minus) to a Contact's point total based on an action they take. Actions include:
- Asset Actions (*Downloads an Asset*); Email Actions (*Is Sent an Email*, *Opens an Email*); Form Actions (*Submits a Form*); Landing Page Actions (*Visits a Landing Page*; *Visits a Specific URL*) You can limit each of these to specific forms, landing pages, URLs, Emails, Assets.

Manage Triggers

- A Trigger consists of a Name, Description, a Points Minimum, a Contact Color, and a series of related Events.
- Events include Campaign Triggers (*Modify Contact's Campaigns*); Contact Triggers (*Modify Contact's Segments*, *Modify Contact's Tags*), Add-on Triggers (*Push Contact to Integration*), Email Triggers (*Send an Email*)

3.9.1 Manage Actions

A Points Action defines a change in Points that is triggered by the action of a Contact. To create a new Points Action, select *Manage Actions* under the *Points* menu dropdown, and then click on the + New button top right. You define the Points Action by entering a Name, Description, a points change (plus or minus), and a visitor *Action* that this change will be associated with. Then click Save & Close to save the new Action.

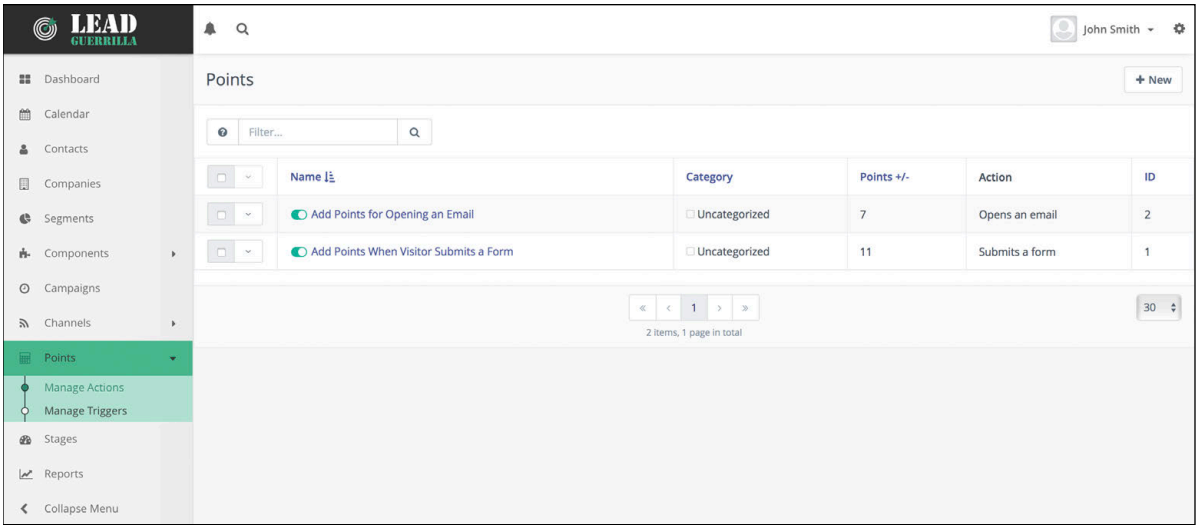

Figure 53: Points Actions List View

3.9.2 Manage Triggers

A Points Trigger describes one or more Events that will occur when a Contact's points total exceeds a set minimum threshold value. To create a new Points Trigger, select *Manage Triggers* under the *Points* menu dropdown, and then click on the + New button top right. You define the Points Trigger by entering a Name, Description, minimum number of points required to trigger the associated events, and a Contact colour for Contacts with at least this point total.

Now click on the Events tab and add one or more Events (options are listed above) to perform when this trigger is satisfied. Then click Save & Close to save the new Trigger.

3.10 Stages

The Stages module is where you will define the ranking into which you want to divide your Contacts in Lead Guerrilla. Each new Contact will likely progress through several Stages. You may well choose only to proactively engage with Contacts once they reach a certain Stage within this progression.

Use the + New button top right to create a new Stage. Enter a *Name* and *Description*, and a *Weight* - then set the toggle value for *Public* and click Save & Close to save the new Stage.

As you run your marketing Campaign in Lead Guerrilla multiple Contacts will be assigned to each of your Stages - typically by using the Action *Change Contact's Stage* in the Campaign workflow.

Any one Contact may belong to only one Stage at a time.

Note: A Contact may not progress from one Stage, to another with a lower *Weight*.

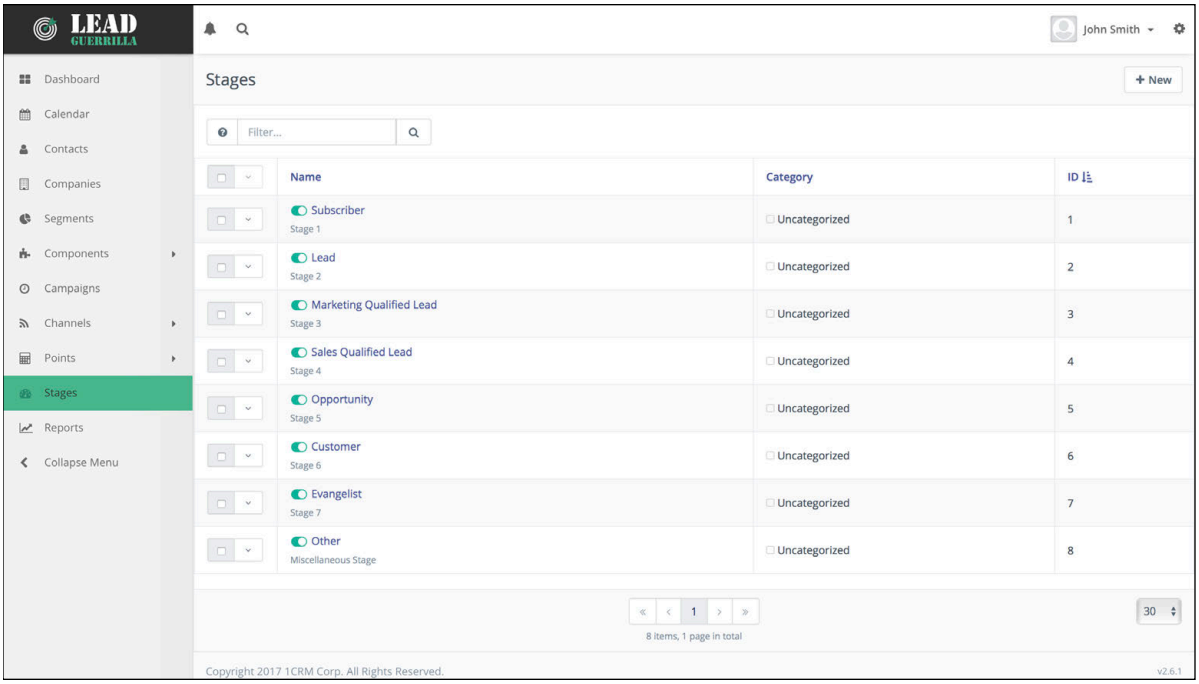

Figure 54: The Default Stages Defined in Lead Guerrilla

The rule that prevents Contacts from moving to a Stage with a lower Weight value is very handy. In effect it prevents a Contacts from *regressing* to a lower valued Stage.

The Figure above shows the default set of Stages defined in Lead Guerrilla, which you can use as-is, change or replace as you prefer.

3.11 Reports

The Reports module enables users to run pre-defined reports or design their own custom reports.

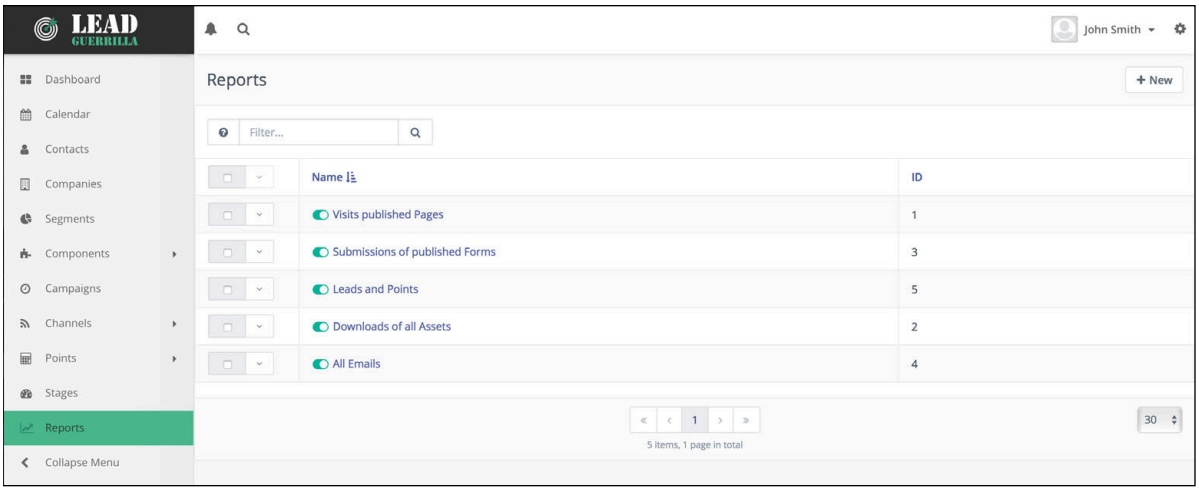

Figure 55: Reports List View

To run an existing report, simply select it from the list view.

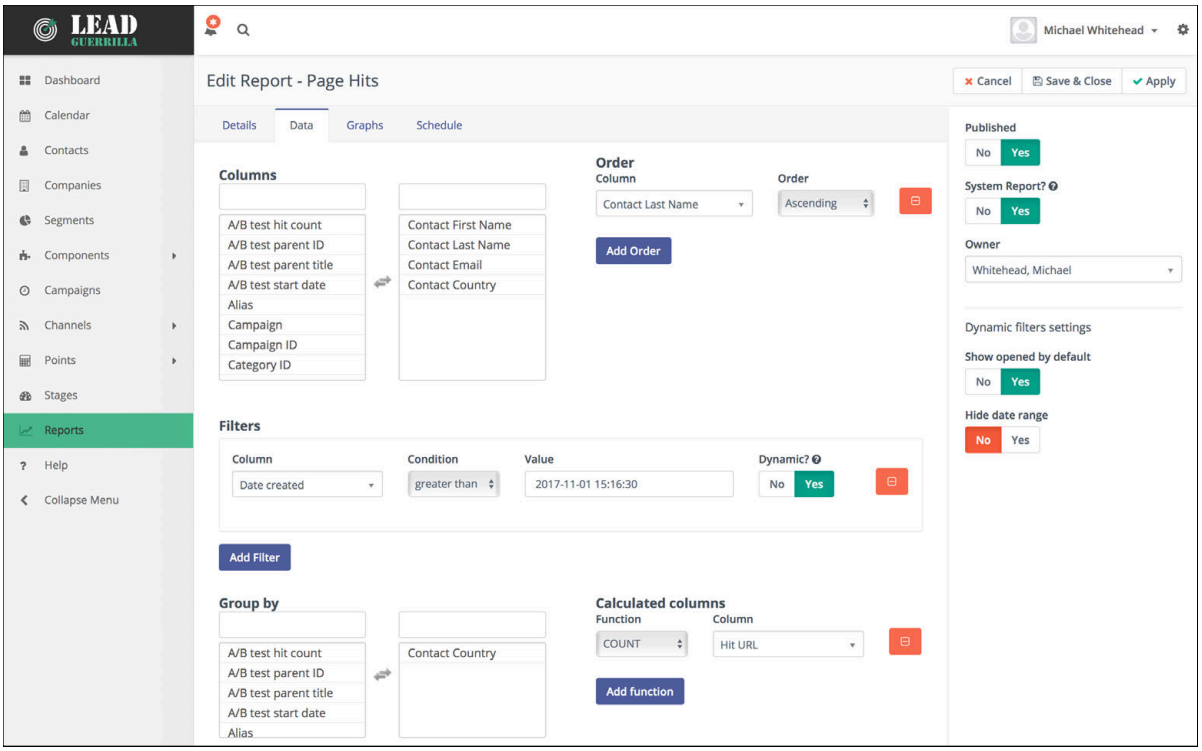

Figure 56: Editing Report Specifications - Data Tab

To create a new Report, click on the + New button top right of the Reports list view. The report is defined by setting values on all four tabs - *Details*, *Data*, *Graphs* and *Schedule*.

Details Tab:

- Name
- Description
- Data Source
- Published
- System Report (if Enabled, Report is accessible to all users)

Data Tab: (See Figure above)

- Column Values
- Order Values (Sorting)
- Filter Values
- Group By Values
- Calculated Columns

Graphs Tab:

- Select Graphs & Tables to include in your report (they vary with the Data Source). Click on Graphs from the list on the left. They move to the list on the right which shows the Charts that will be generated. Reverse the process to remove Charts.

Data Source may be selected from the following 20 choices:

- Assets
  - Assets
  - Asset Downloads
- Campaigns
  - Campaign Events
- Channel Messages
  - Message Queue
- Emails
  - Emails
  - Emails Sent
- Forms
  - Forms
  - Form Submissions
- Contacts
  - Contacts
  - Multi-touch Attributions
  - First Touch Attributions
  - Last Touch Attributions
  - Contact Point Log
  - Frequency Rules
  - Segment Membership
- Companies
  - Companies
- Mobile Notifications
  - Mobile Notifications
  - Mobile Notifications sent
- Pages

- Landing Pages
- Page Hits

Schedule Tab:

- Turn on the *Email Report* toggle control on the *Schedule* tab to enable Lead Guerrilla to email copies of your reports to a list of recipients on a scheduled basis. Reports may be emailed daily, weekly or monthly, as shown below.

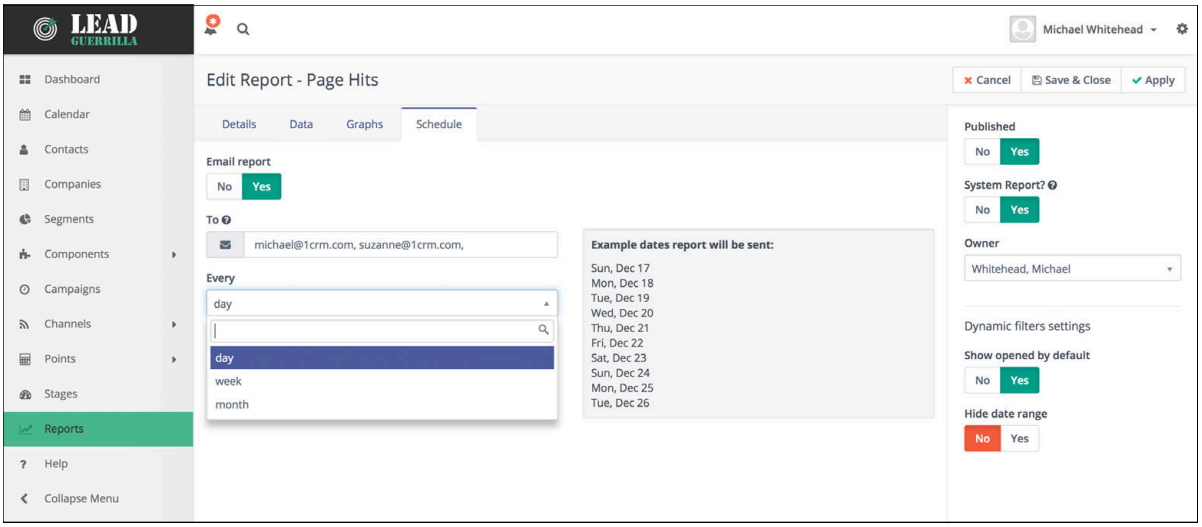

Figure 57: Editing Report Specifications - Schedule Tab

3.11.1 How to Build a Report in Lead Guerrilla

Reports in Lead Guerrilla are extremely useful as they help you analyze the performance of your different marketing channels as well as understand more functional information such as which emails have been queued or which segments your contacts are associated with. Achieving these various goals will require you to design your own variety of reports within Lead Guerrilla.

As you might expect, select the *Reports* module from the main menu to see a list of all reports defined within your Lead Guerrilla system. When editing a report, as you navigate the four tabs (*Details*, *Data*, *Graphs* and *Schedule)* used to define the report you will notice that some data sources provide a high-level summary of the data while others provide a more granular view that includes your custom fields and values.

For example, there are 20 data sources available for reports. A channel within the data source that has two options like *Emails* and *Emails Sent* will offer two different views. The top data source, (e.g. *Emails*) will display a high-level view of the data while the bottom data source (e.g. *Emails Sent*) will be more granular.

The instructions below detail just how to build three of our most popular reports.

3.11.2 Emails Sent Report

This report is best used to review your sent emails at a granular level. By pulling data in from the *Emails Sent* data source, you'll be able to see which contacts received, opened and clicked your different emails. To create the report, follow the instructions below:

1. Select the *Reports* module.
2. Click on the + New button and name your report.
3. Select the *Emails Sent* data source.
4. Click on the *Data* tab to add columns to your report. The most common columns that users add are:
   - ID (which is the email ID)
   - Name (which is the email name)
   - Contact First Name
   - Contact Last Name
   - Contact email
   - Read
   - Clicks
   - Unique Clicks
   - Unsubscribes
5. We recommend adding in a blank filter for the email name or ID. Then setting the *Dynamic* slider to *Yes*. This will allow you to toggle easily in the report to review different emails. (See Figure below.)
6. Click Save & Close .
7. From here, you can filter the report by expanding the *Filters* section in the reports page or you can export the report to CSV, HTML or Excel.

We recommend using the UI to review your data, but if if you need to manipulate the data by creating graphs or pivot tables then we recommend exporting your report to excel to perform those functions.

Follow the same instructions above to create a similar report for *Form Submissions*, *Mobile Notifications Sent* or *Page Hits*.

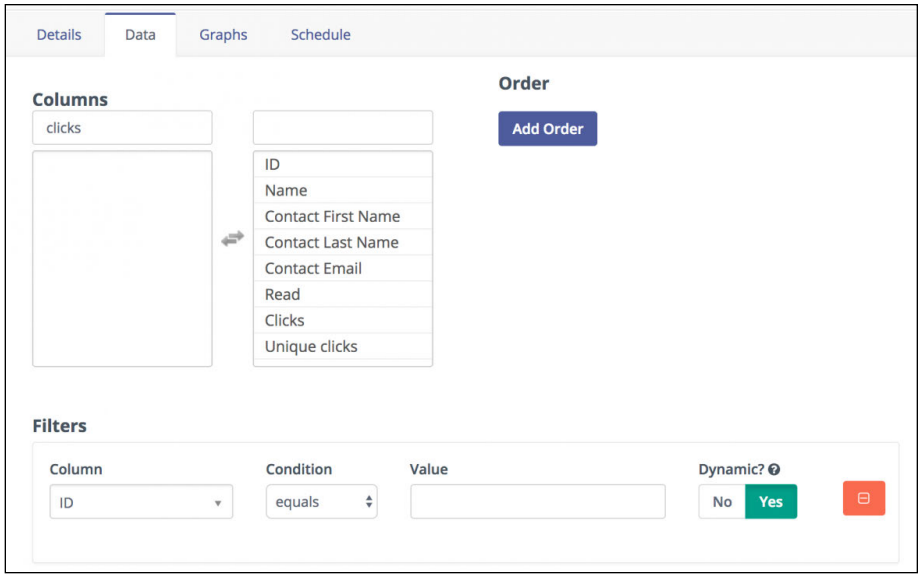

Figure 58: Emails Sent Report

3.11.3 Messages Queued Report

This report will display all emails that are queued up to be sent due to the *Frequency* rule setting you have configured under the *Configuration* tab. To create the *Messages Queued* report, follow the instructions below:

1. Select the *Reports* module.
2. Click on the + New button and name your report.
3. Select the *Message Queue* data source.
4. Click on the Data tab to add columns to your report. The most commonly-used columns are:
   - Message Channel
   - Message ID
   - Contact email
   - Contact ID
   - Contact First Name
   - Contact Last Name
   - Last Attempt Date
   - Total Attempts
   - Scheduled Date
   - Status
   - Success
5. Click Save & Close .
6. The *Contact ID* will be clickable, so you can go into the contact timeline to view the contact details. Additionally, you can filter the report by expanding the *Filters* section on the report page or you can export the report to CSV, HTML or Excel.

We recommend using the UI to review your data, but if you need to manipulate the data by creating graphs or pivot tables then we recommend exporting your report to excel to perform those functions.

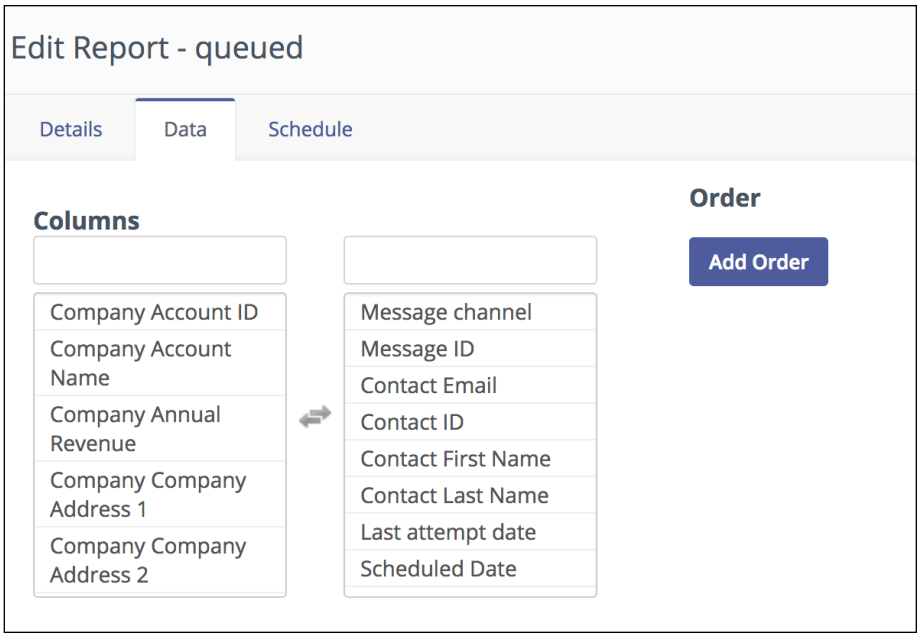

Figure 59: Messages Queued Report

3.11.4 Segment Membership Report

This report will display all contacts that have been added to a segment and how they were added or removed from a segment. To create the report, follow the instructions below:

1. Select the *Reports* module.
2. Click on the + New button and name your report.
3. Select the *Segment Membership* data source
4. Click on the Data tab to add columns to your report. The most common columns that users add are:
   - Contact ID
   - Email
   - First Name
   - Last Name
   - ID (this will be ID of the segment)
   - Name (this will be Name of the segment)
   - Manually Added
   - Manually Removed
5. We recommend adding a filter for the Segment you'd like to review (see screenshot below)
5. Click Save & Close .
6. From here, you can filter the report by expanding the *Filters* section on the report page or you can export the report to CSV, HTML or Excel.

We recommend using the UI to review your data, but if you need to manipulate the data by creating graphs or pivot tables then we recommend exporting your report to excel to perform those functions.

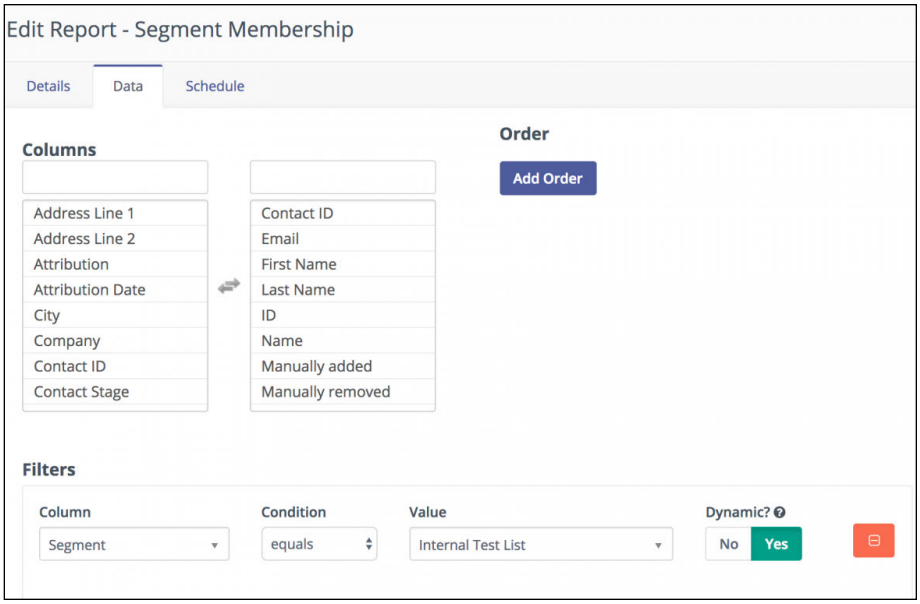

Figure 60: Segment Membership Report

3.12 Help System

The Help system contains the text and images from the Lead Guerrilla User Guide, in an HTML format. The Help System is there to help you learn all the capabilities offered by Lead Guerrilla. Selecting Help from the system menu will open a new browser tab with the Help System contents.

The Lead Guerrilla Help System offers a collapsible navigation tree in a panel on the left, with controls to *Collapse all* or *Expand all* branches. You can also click on any right-pointing blue triangle to expand a branch, or click on a downward-pointing one to collapse a branch. Blue diamonds indicate the end of a branch - a leaf.

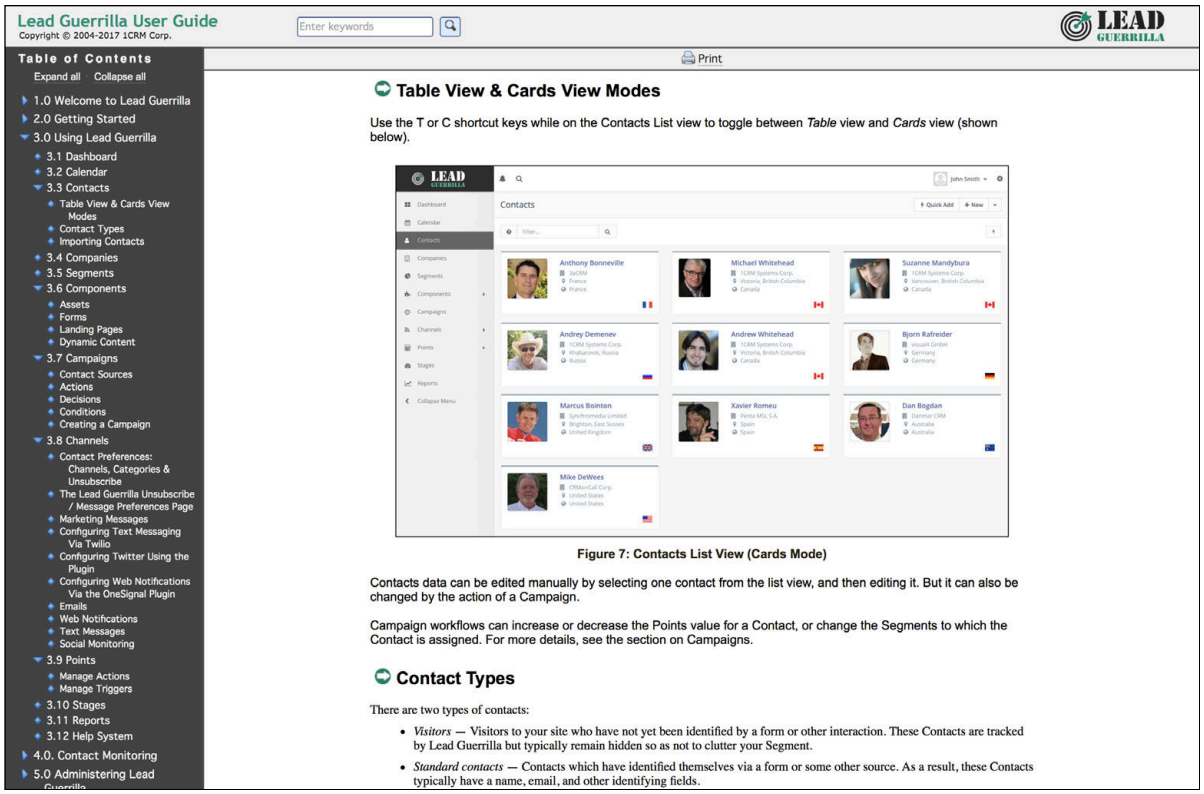

Figure 61: Lead Guerrilla Help System

You can access the information in the Help system by navigating to a specific section with the navigation tree on the left, then browsing the text in the main panel, as shown in the Figure above.

Alternatively you can enter a keyword or two in the Help System search field, and click on the button, as shown in the Figure below. In this case, the navigation tree panel is replaced by the search results. You can click on any result to see the detailed content associated with it in the main panel.

After you have clicked on at least one search result, you can click on the *Next* and *Previous* arrows to step through the search results forwards or backwards.

When you have finished looking at a set of search results and want to return to normal navigation of the Help system, just click on *Done Search*.

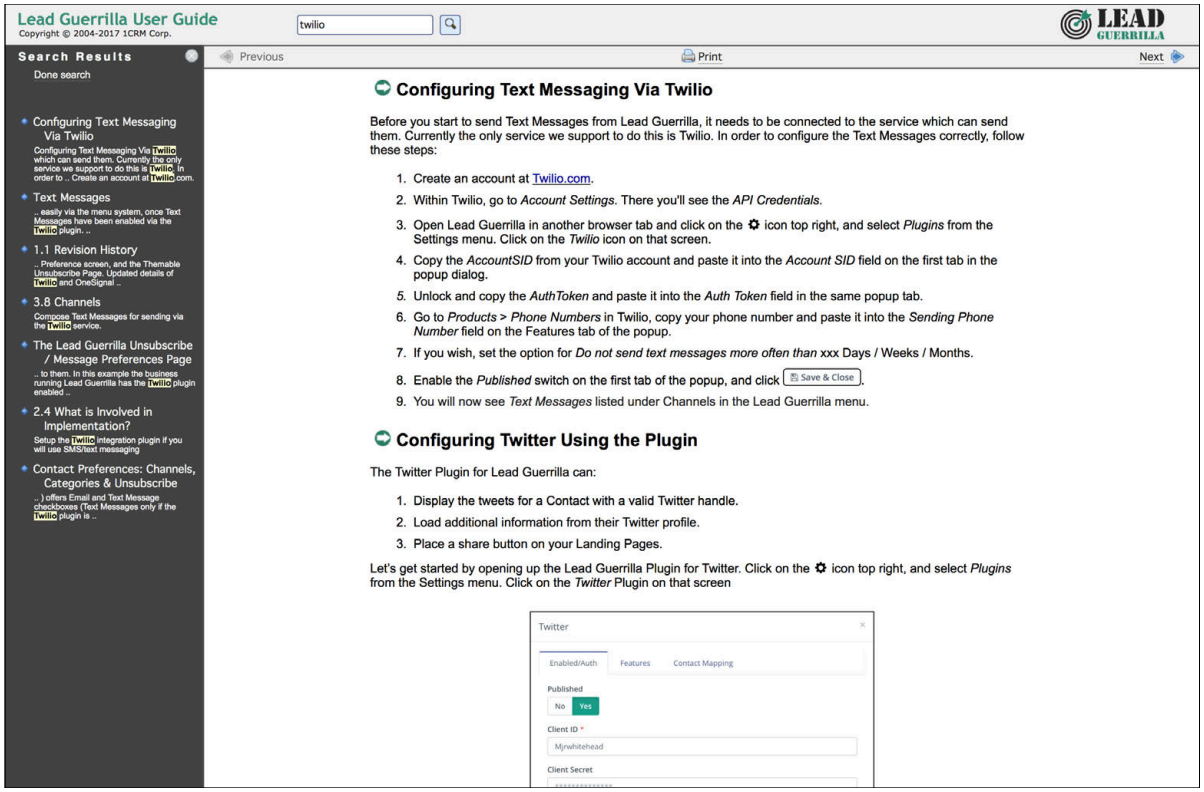

Figure 62: Help System Search Mode

4.0. Contact Monitoring

The act of monitoring the traffic and activity of contacts can sometimes be somewhat technical and frustrating to understand. Lead Guerrilla makes this monitoring simple and easy to configure.

4.1. Website Monitoring

Monitoring all traffic on a website can be done by loading a javascript file or adding a tracking pixel to the website. It is important to note that traffic will not be monitored from logged-in Lead Guerrilla users. To check that the JS/pixel is working, use an incognito or private browsing window or simply log-out of Lead Guerrilla prior to testing.

4.1.1 Javascript (JS) tracking

JS tracking method is recommended as the primary way of website tracking. To implement it, go to *Lead Guerrilla configuration* > *Landing Page Settings* to find the JS tracking code build for your Lead Guerrilla instance and insert it code before ending **<body/>** tag of the website you want to track. Or copy the code below and change the URL to your Lead Guerrilla instance.

Lead Guerrilla sets cookies with a lifetime of 2 years. Returning visitors are identified exclusively by the cookie. If no cookie exists yet, Lead Guerrilla creates a new contact and sets the cookie. Make sure your website url is entered in the CORS settings. This is the first step in better contact identification. Note that if a browser is set to not accept cookies, this may result in each hit creating a new visitor. If this behavior is concerning, see the Fingerprint option below.

```
<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','http(s)://yourLG.com/mtc.js','mt');

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

Don't forget to change the scheme (http(s)) either to http or https depending what scheme you use for your Lead Guerrilla system. Also, change [yourLG.com] to the domain where your Lead Guerrilla system runs.

The advantage of JS tracking is that the tracking request which can take quite a long time to load is loaded asynchronously so it doesn't slow down the tracked website. JS also allows you to track more information automatically:

- *Page Title* is the text written between **</title>** tags.
- *Page Language* is the language defined in the browser.
- *Page Referrer* is the URL which the contact came from to the current website.
- *Page URL* is the URL of the current website.

mt() Events

mt() supports two callbacks, onload and onerror accepted as the fourth argument. The onload method will be executed once the tracking pixel has been loaded. If the pixel fails for whatever reason, onerror will be executed.

```
mt('send', 'pageview', {}, {
    onload: function() {
        redirect();
    },
    onerror: function() {
        redirect();
    }
});
```

Local Contact Cookie

If CORS is configured to allow access from the domain the mtc.js is embedded, a cookie will be placed on the same domain with the name of **`mtc_id`**. This cookie will have the value of the ID for the currently tracked contact. This provides access to server side software to the contact ID and thus providing the ability to integrate with Lead Guerrilla's REST API as well.

Tracking of custom parameters

You can attach custom parameters or overwrite the automatically generated parameters to the pageview action as you could to the tracking pixel query. To do that, update the last row of the JS code above like this:

```
mt('send', 'pageview', {email: 'my@email.com', firstname: 'John'});
```

This code will send all the automatic data to Lead Guerrilla and adds also email and firstname. The values of those fields must be generated by your system.

Load Event

As the JS tracking request is loaded asynchronously, you can ask JS to call a function when request is loaded. To do that, define a *onload* function in options like this:

```
mt('send', 'pageview', {email: 'my@email.com', firstname: 'John'},
{onload: function() { alert("Tracking request is loaded"); }});
```

Fingerprint

Lead Guerrilla comes with a tracking feature called fingerprint - for which the Fingerprint2 library was used. It should work together with, or replace, current tracking identifiers like IP address and/or cookie ID. This method is not yet deeply implemented into the system, but you can see more information in the timeline page hit events in the contact detail:

- *Fingerprint* - Unique hash calculated from browser settings and another environment variables.
- *Resolution* - With x Height of the device display resolution.
- *Timezone Offset* - Amount of minutes plus or minus from UTC.
- *Platform* - Platform of the device. Usually OS and processor architecture.

- *Adblock* - A Boolean value whether contact uses an adblock browser plugin.
- *Do Not Track* - A Boolean value if DNT is turned on.

If you'd like to store any of the values above to a contact detail field, create a new custom field with exactly the same name as in the list above and make the field publicly updatable. You can also try to make the Fingerprint field unique and this way you can simulate future fingerprint tracking. Do not use this approach on production systems without prior testing.

4.1.2 Tracking Pixel tracking

This method is secondary to the recommended Javascript tracking method.

`http://yourdomain.com/mtracking.gif`

Tracking Pixel Query

To get the most out of the tracking pixel, it is recommended that you pass information of the web request through the image URL.

Page Information

Lead Guerrilla currently supports **`page_url`**, **`referrer`**, **`language`**, and **`page_title`** (note that the use of **`url`** and **`title`** are deprecated due to conflicts with contact fields).

UTM Codes

Support for UTM codes in the contact time-line is supported. **`utm_medium`**, **`utm_source`**, and **`utm_campaign`** are used to generate the content of the time-line entry.

`utm_campaign` will be used as the time-line entry's title.

`utm_medium` values are mapped to the following Font Awesome classes:

Values	Class
social, socialmedia	fa-share-alt if utm_source is not available otherwise utm_source will be used as the class. For example, if utm_source is Twitter, fa-twitter will be used.
email, newsletter	fa-envelope-o
banner, ad	fa-bullseye
cpc	fa-money
location	fa-map-marker
device	fa-tablet if utm_source is not available otherwise utm_source will be used as the class. For example, if utm_source is Mobile, fa-mobile will be used.

Embedding the Pixel

If you are using a CMS, the easiest way is to let one of our plugins do this for you (see below). Note that the plugins may not support all contact fields, utm codes or contact tags.

Here are a couple code snippets that may help as well:

HTML

```
<img src="http://yourdomain.com/mtracking.gif?
page_url=http%3a%2f%2fyourdomain.com%2fyour-product-
page&page_title=Some%20Cool%20Product&email=user%40theirdomain.com&tags=Pr
oductA,-ProductB" style="display: none;"  alt="Lead Guerrilla is marketing
automation" />
```

PHP

```
$d = urlencode(base64_encode(serialize(array(
    'page_url'   => 'http://' . $_SERVER[HTTP_HOST] .
$_SERVER['REQUEST_URI'],
    'page_title' => $pageTitle,    // Use your website's means of
retrieving the title or manually insert it
    'email' => $loggedInUsersEmail // Use your website's means of user
management to retrieve the email
))));

echo '<img src="http://your-leadguerrilla.com/mtracking.gif?d=' . $d . '"
style="display: none;" />';
```

Javascript

```
<script>
var leadguerrillaUrl = 'http://your-leadguerrilla.com';
var src = leadguerrillaUrl + '/mtracking.gif?page_url=' +
encodeURIComponent(window.location.href) + '&page_title=' +
encodeURIComponent(document.title);
var img = document.createElement('img');
img.style.width  = '1px';
img.style.height  = '1px';
img.style.display = 'none';
img.src = src;
var body = document.getElementsByTagName('body')[0];
body.appendChild(img);
</script>
```

Contact Fields

You can also pass information specific to your contact by setting Lead Guerrilla contact field(s) to be publicly updatable. Note that values appended to the tracking pixel should be url encoded (%20 for spaces, %40 for @, etc..).

Tags

The contact's tags can be changed by using the **`tags`** query parameter. Multiple tags can be separated by comma. To remove a tag, prefix it with a dash (minus sign).

For example, **`mtracking.gif?tags=ProductA,-ProductB`** would add the ProductA tag to the contact and remove ProductB.

4.1.3 Content Management System Plugins

Lead Guerrilla makes this even easier by providing key integrations to many existing content management systems. You can download and use any of the following plugins to automatically add visitor tracking to your website. These plugins typically use pixel tracking only as a fallback if javascript is disabled in the visitor's browser. Javascript tracking is preferable as it can gather more information about the visitor, such as page title or device fingerprint. This kind of information is unavailable when using pixel tracking.

A detailed discussion (and download links) of the plugins for Joomla!, WordPress, Drupal and TYPO3 may be found in Chapter 8.

These are just a few of the integrations already available in the Lead Guerrilla community. More will be added in the future and developers are encouraged to submit their own integrations.

Note: It is important to note that you are not limited by these plugins and you can place the tracking pixel directly on any HTML page for website tracking.

4.1.4 Mobile Monitoring

The essence of monitoring what happens in an App is similar to monitoring what happens on a website. Lead Guerrilla contains the building blocks needed for native (or pseudo-native) and HTML5-wrapper based Apps, regardless of platform.

In short, use named screen views (e.g. main_screen) in your App as your page_url field in the tracker, and the contact's email as the unique identifier, see next section for detailed instructions.

4.1.5 Steps in Lead Guerrilla

1. Make the email field publicly editable, this means that a call to the tracking GIF with the variable email will get properly recognized by Lead Guerrilla.
2. Setup a form, which will be the access point of your campaign (e.g. a new contact email). Make this form as simple as you can, as you will be POST-ing to it from your App. The typical form URL you will POST to is

   http://your_leadguerrilla/form/submit?formId=<form_id>

You can get the ID from the Lead Guerrilla URL as you view / edit the form in the Lead Guerrilla interface (or in the forms tables, last column), and you can get the form fields by looking at the HTML of the 'Manual Copy' of the HTML in the forms editing page.

Define in your campaigns the screens you want to use as triggers (e.g. 'cart_screen' etc.). Lead Guerrilla is not looking for a real URL in the form 'http://' for page_url, any typical string would do. Like this:

http://yourdomain.com/mtracking.gif?
page_url=cart_screen&email=myemail@somewhere.com

4.1.6 Steps in your App

A best-in-class approach is to have a class (say 'leadguerrilla') that handles all your tracking needs. For example, this sample method call would POST to the form with ID 3 - see previous section (note: for conciseness and ubiquity, these sample lines are written in JavaScript / ECMAScript-type language, use similar call in your mobile App language of choice).

```
leadguerrilla.addContact("myemail@somehwere.com",3)
```

And then, to track individual user activity in the App, this sample call would make an HTTP request to the tracker:

```
leadguerrilla.track("cart_screen", "myemail@somewhere.com")
```

Which is nothing more than an HTTP request to this GET-formatted URL (as also shown in previous section):

http://yourdomain.com/mtracking.gif?
page_url=cart_screen&email=myemail@somewhere.com

Important: Make sure in your App, that the above HTTP request is using a cookie (if possible, re-use the cookie from the leadguerrilla.addcontact POST request prior) AND that you reuse this cookie from one request to the next. This how Lead Guerrilla (and other tracking software) knows that it's really the same user. If you can't do this, you may run in the (unlikely but possible) case where you

have multiple contacts from the same IP address and Lead Guerrilla will merge them all into a single contact as it can't tell who is who without a cookie.

4.1.7 Other Online Monitoring

There are several other ways to monitor contact activity and attach points to those activities. Website monitoring is only one way to track contacts. Other contact monitoring activities can consist of forum posts, chat room messages, mailing list discussion posts, GitHub/Bitbucket messages, code submissions, social media posts, and a myriad of other options.

5.0 Administering Lead Guerrilla

5.1 Personal Account Settings

To access your personal Account settings click on your user name near the top right of the screen (see the dropdown in the Figure below) and select the *Account* option.

Note: You can also *Logout* from your Lead Guerrilla session using the other option provided here. Or choose *About* to view information about Lead Guerrilla and the source of various aspects of it.

The *Account Details* tab is the main place you need to go here - and setting the fields shown below should be fairly self-explanatory.

On the *Authorized Applications* tab, all you can do is revoke your access to any applications for which you are authorized.

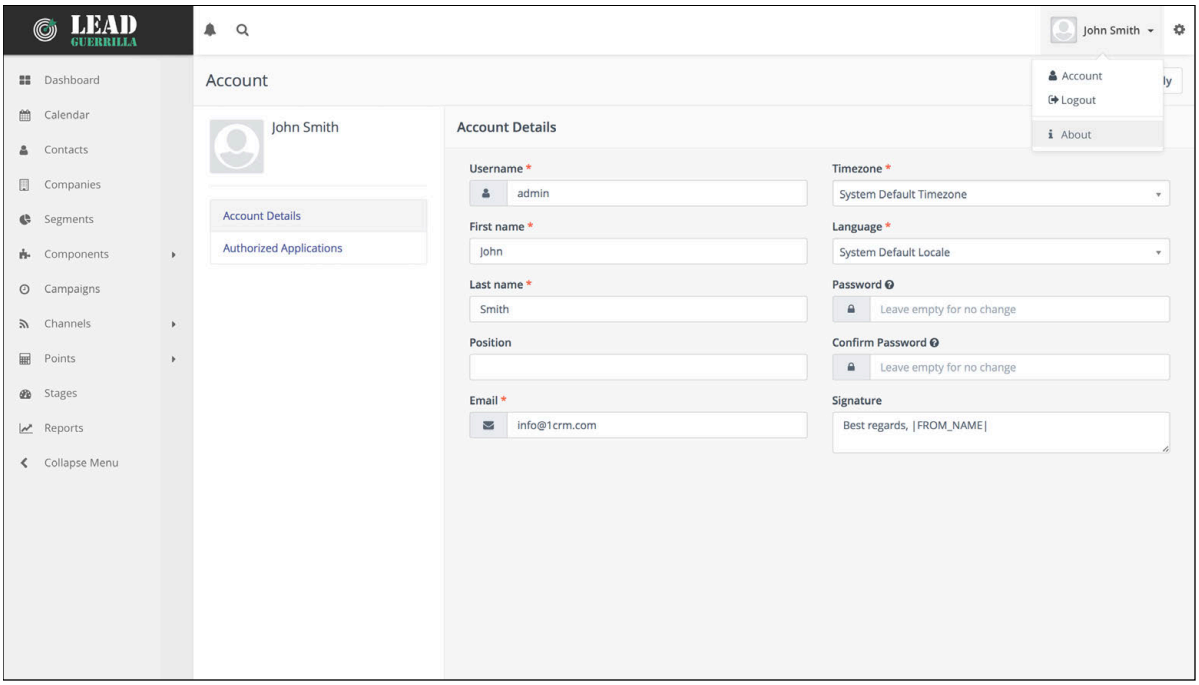

Figure 63: My Account - Account Details Tab

5.2 System Settings & Administration

Note: The information presented is this section is only relevant for your System Administrator.

To access the Admin Settings screens for your Lead Guerrilla system, click on the ⚙ icon at the top right of the screen. The *Settings* menu will slide out from the right hand edge of the screen as shown in the Figure below. There are ten menu options:

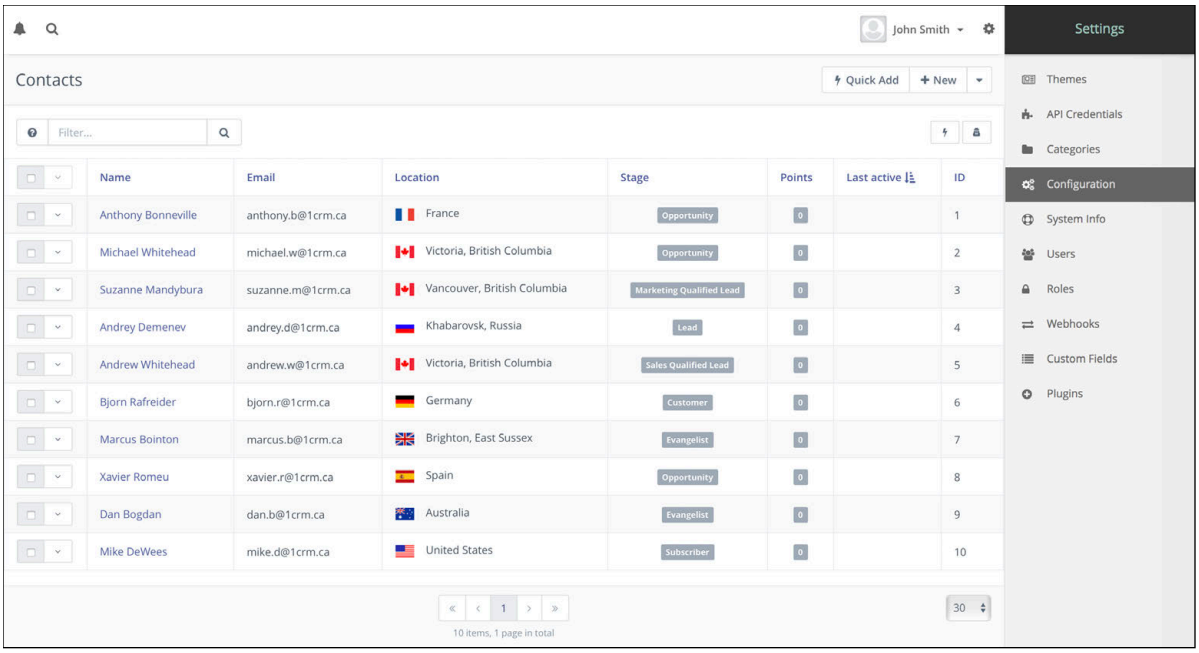

Figure 64: System Settings Menu

5.2.1 Themes

Themes are what provide the designs you see available when editing *Emails* and *Landing Pages*.

The table of installed Themes shows you the name of the Theme, the author's name and a link to their website if provided, plus the set of features offered by the Theme. There is also a preview (if available) to see a screenshot of the Theme under the arrow to the left of the Theme name.

Install a new Theme

A new Theme can be installed as a *zip* package. The zip package must have the same structure as the themes preinstalled in Lead Guerrilla. Than means there must be a **`config.json`** file present in the root folder of the zip package. More information about this file structure is available upon request.

If you have a Theme zip package you wish to install use the *Choose File* button at the top right of the screen to choose the zip file, then click on *Install*. A message will indicate if the installation was successful or not and if so, the new Theme will appear in the table of currently installed Themes.

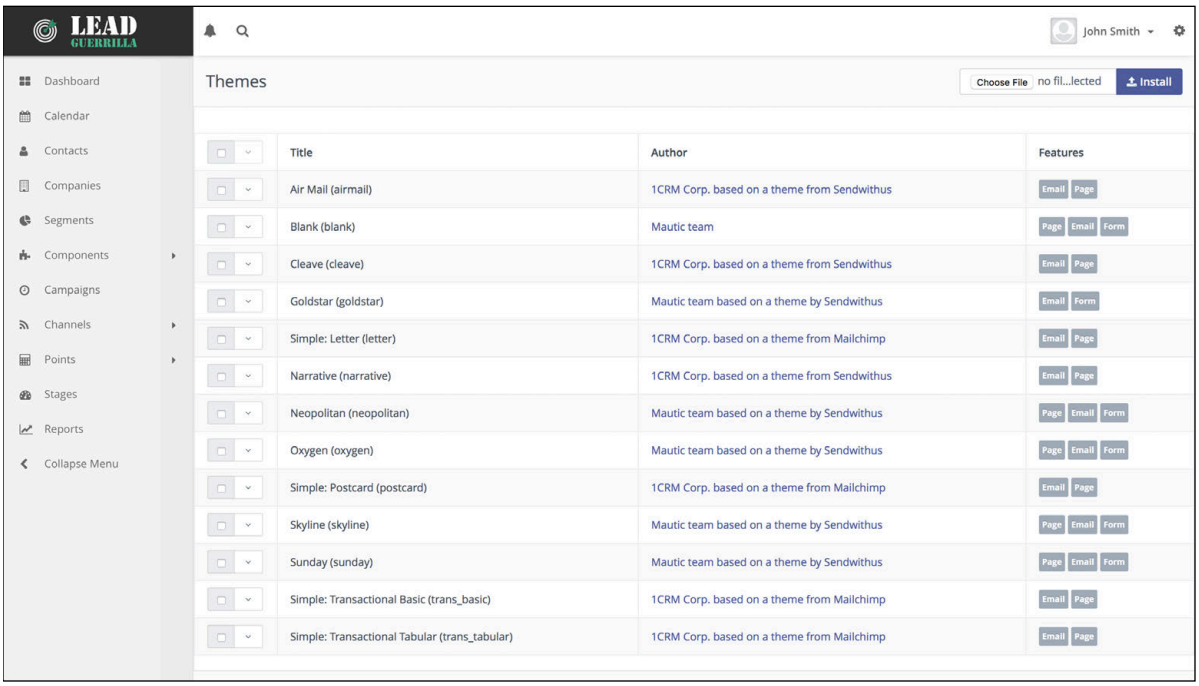

Figure 65: Themes Manager, from the Settings Menu

Assigning a Default Theme

It is possible to assign a default Theme to a Lead Guerrilla instance by editing your system Configuration. Click on the ⚙ icon top right, and select *Configuration* from the Settings menu.

On the Configuration screen, set the *Default Theme* field dropdown selection in the *General Settings* panel. Once saved, this setting will apply for all resources which do not have a Theme explicitly specified.

5.2.2 API Credentials

Your Lead Guerrilla system may need to interact via its API with other systems. This screen is provided to manage the credentials of those other systems, and ensure the security of all API access to data within Lead Guerrilla.

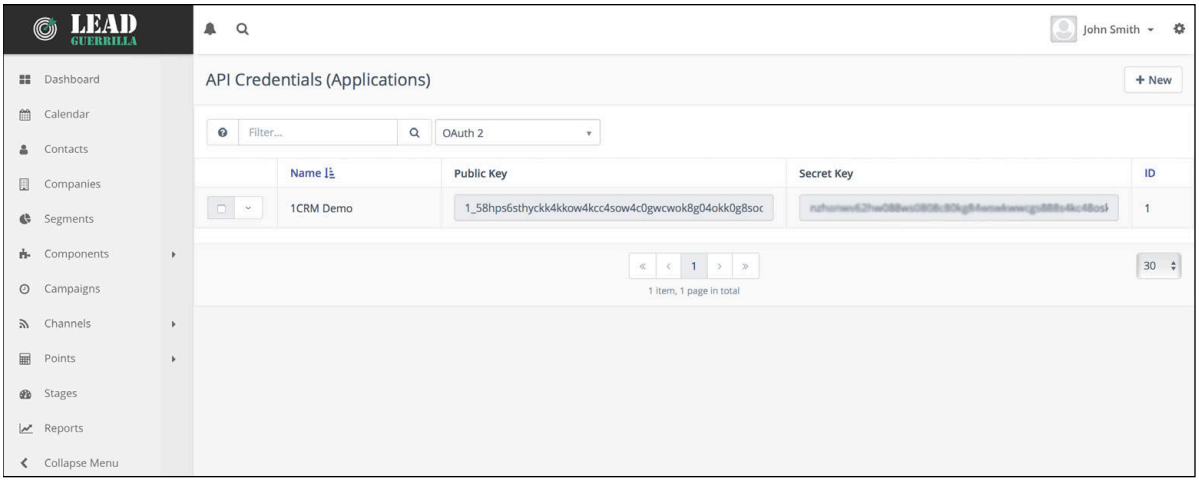

Figure 66: API Credentials

5.2.3 Categories

The *Categories* admin option allows you to define Categories to better organize:

- Assets
- Campaigns
- Emails
- Forms
- Pages
- Points
- Social Monitoring
- Stages

Each Category has an associated colour to help visually identify different Categories of items. You often might use a Category to organize the objects above according to the sort of Product or Service they relate to. You might have a Campaign that promotes a specific product or service, and it would use Assets, Forms, Emails and Pages that are also related to the same topic - and so you might mark them all as belonging to the same Category.

5.2.4 Configuration

Choose this option to access the main system configuration settings. This screen is actually very large as it contains eleven tabs, and some of the tabs like *System Settings* and *Email Settings* have long lists of values to configure.

Of particular interest here are these screens:

- *System Settings*: General settings, system defaults, Cookie settings, CORS and miscellaneous settings
- *API Settings*: Used to integrate Lead Guerrilla with other systems using an open API
- *Asset Settings*: Manage location, permissible types and size for web assets
- *Campaign Settings*: Configure wait time before retry of failed campaign actions
- *Email Settings*: Manage settings for sending and monitoring email, tracking bounces and unsubscribe requests, tracking pixel, and standard message definitions
- *Contact Settings*: Control if large Contact CSV imports are automatically performed in the background
- *Landing Page Settings*: Manage analytics scripts and 3rd party website tracking for Lead Guerrilla Landing Pages
- *User / Authentication Settings*: Manage SAML SSO Settings.
- *Webhook Settings*: Configure how to process webhook events.
- *Social Settings:* Set your Twitter handle.
- *Themable Unsubscribe Page*: Manage and customize the *Unsubscribe / Manage Prefs Page*

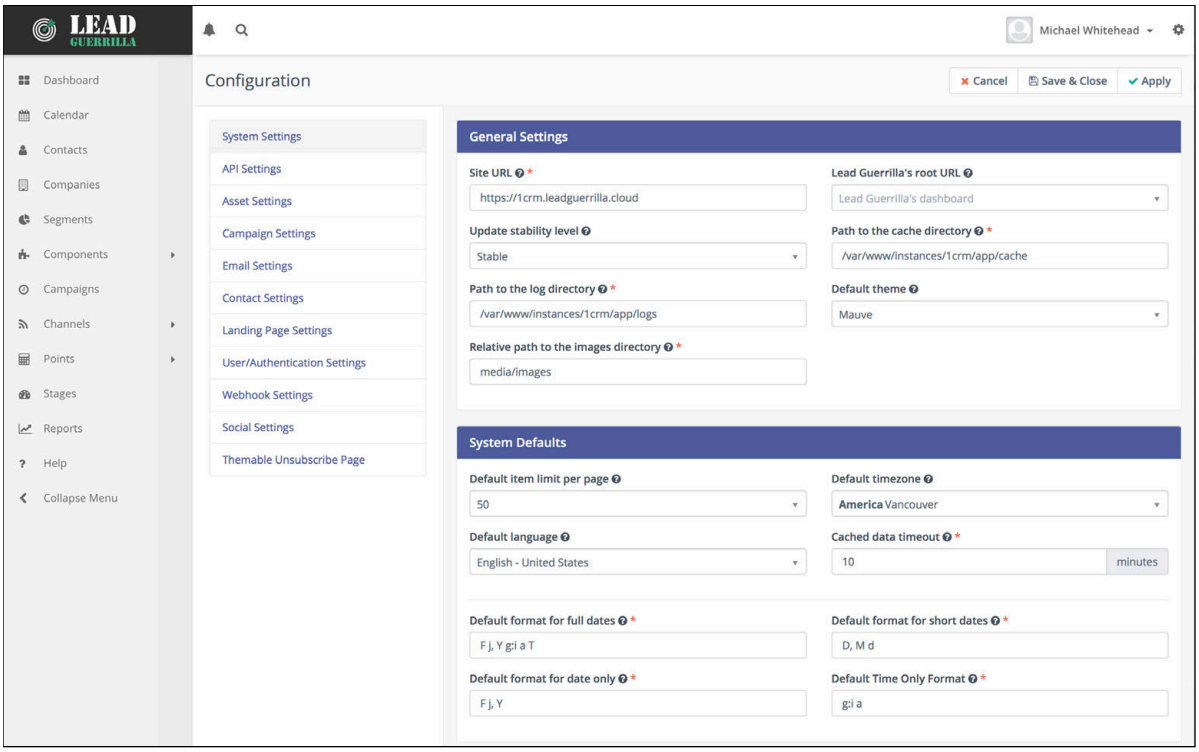

Figure 67: Configuration Settings

5.2.5 System Info

The *System Info* menu option in Settings may be used to display three different types of information about the server on which your Lead Guerrilla instance is running.

- *PHP Info* - comprehensive information about your server's PHP version and associated modules
- *Folder and File Permissions* - displays the status of several critical paths within the Lead Guerrilla application directory which must be writeable
- *Log* - displays the recent contents of your server's PHP error log

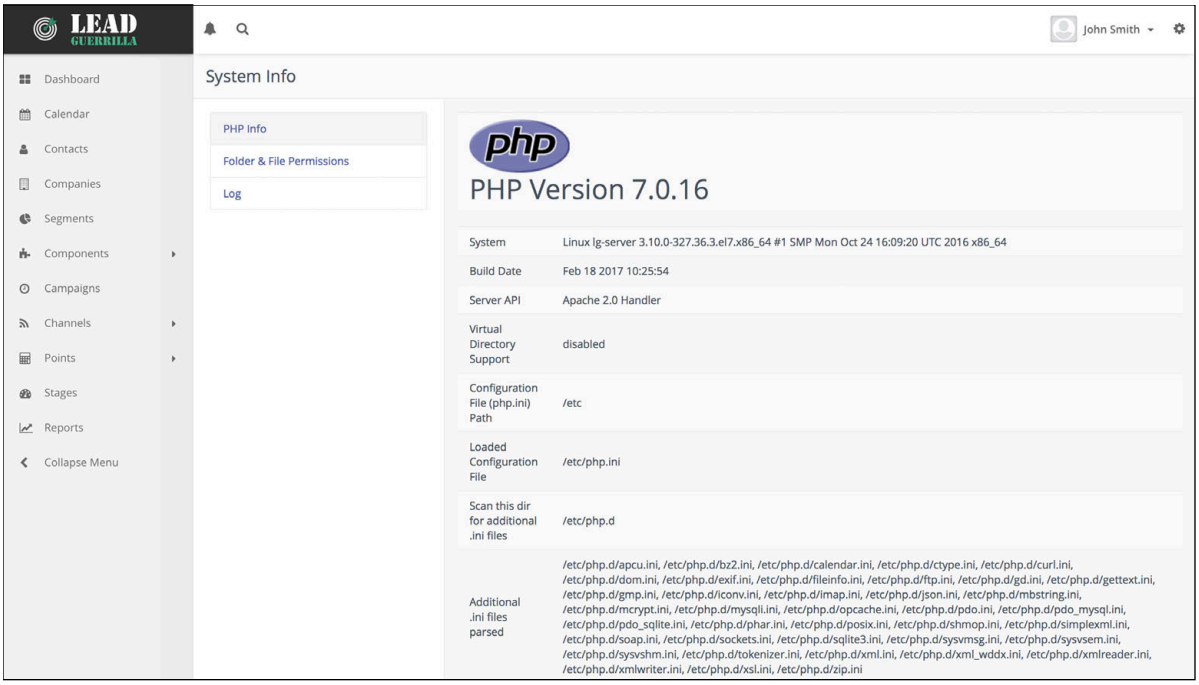

Figure 68: System Info

5.2.6 Users

The Users menu option in Settings is provided to allow the System Administrator to Create new Users, Delete existing Users, or alter details or system access for existing Users. The information displayed is the same as that on the Account details tab available to each user, with the addition of their Role.

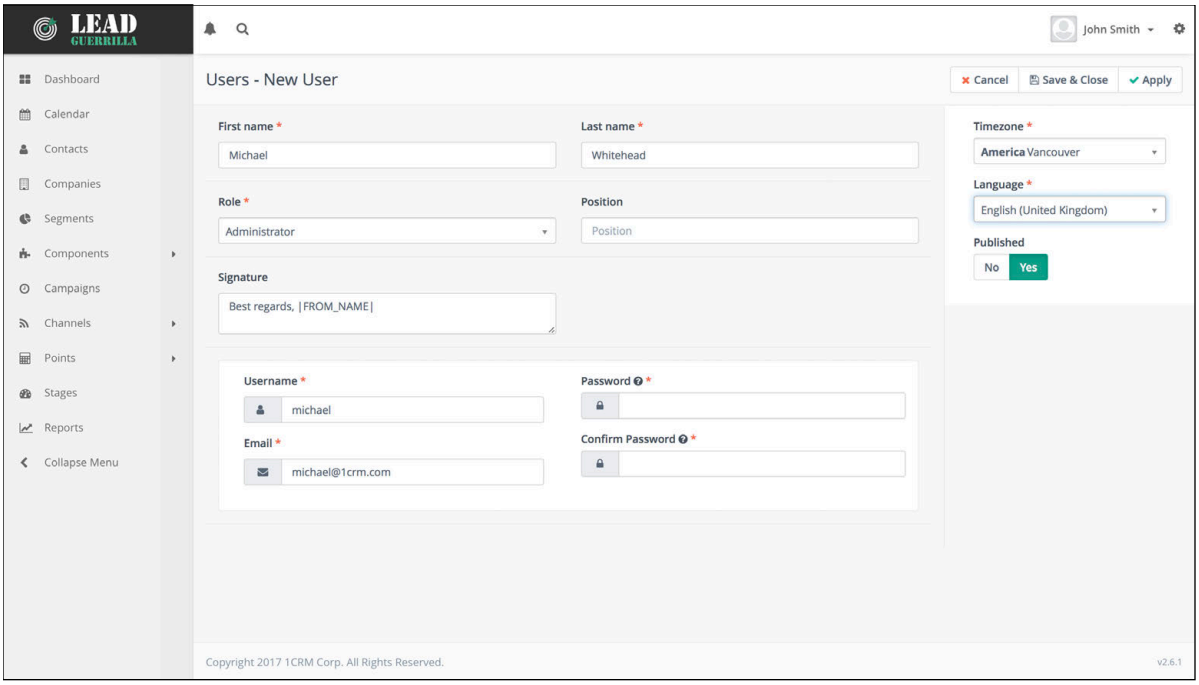

Figure 69: Editing a User and Selecting Their Role

5.2.7 Roles

The *Roles* menu option in Settings is used to define different types of user access. Then when *Users* are defined, each user has a Role assigned to them which controls what they can see and do within Lead Guerrilla. The screen below shows the creation of a new Role, and gives you a good idea of how granular the permission management can be within Lead Guerrilla.

Note: Each Role also has an option to simply enable Full system access, which bypasses these granular settings.

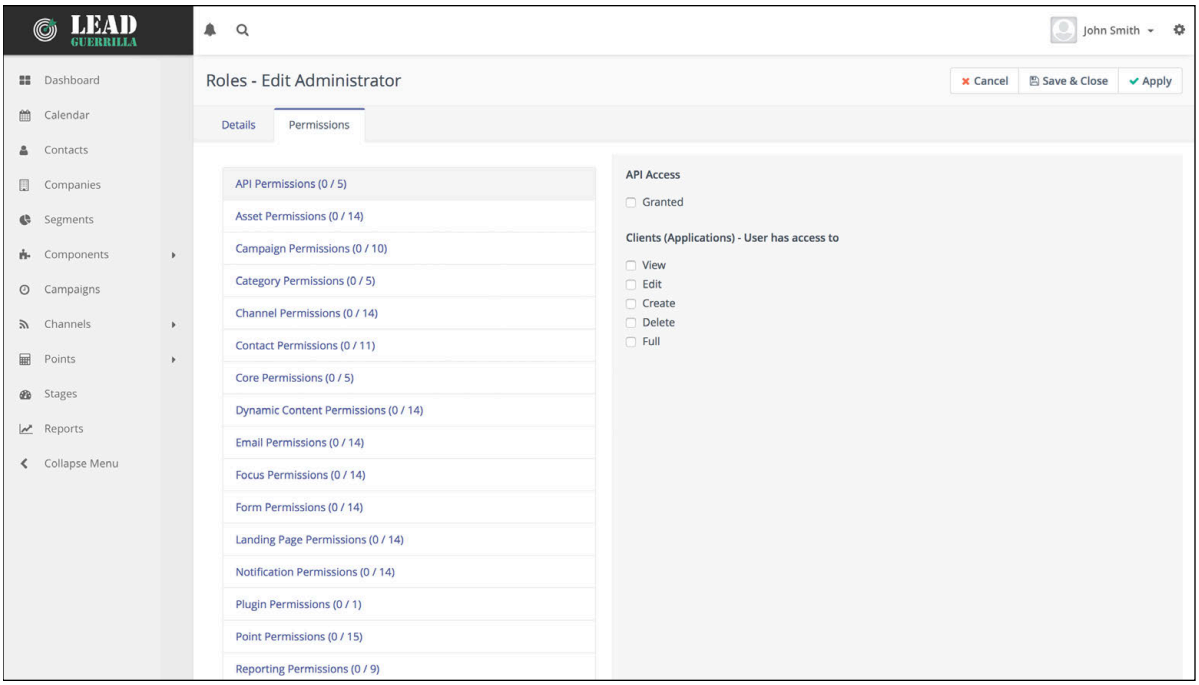

Figure 70: Creating a New Role

5.2.8 Webhooks

A Webhook is an HTTP URL endpoint supported by a third party application which can receive a POST. It feels a lot like a REST API, but for you application's purposes it is just one half of the API (e.g.: all the POST endpoints). That endpoint URL is then passed data each time an event occurs.

Adding Webhooks to an application where data is changing constantly is a perfect solution to the API loophole, because now we know that data has changed, and our application just has to be responsible to receive the payload and act on it appropriately.

Gone is the need to continually poll the remote resource to find out if data has changed, update it, and then check again in a little while to do the exact same check. This eliminates so many complexities. API limits become a non-issue, out of sync data liabilities are reduced, and CPU cycles get saved by everyone in the transaction.

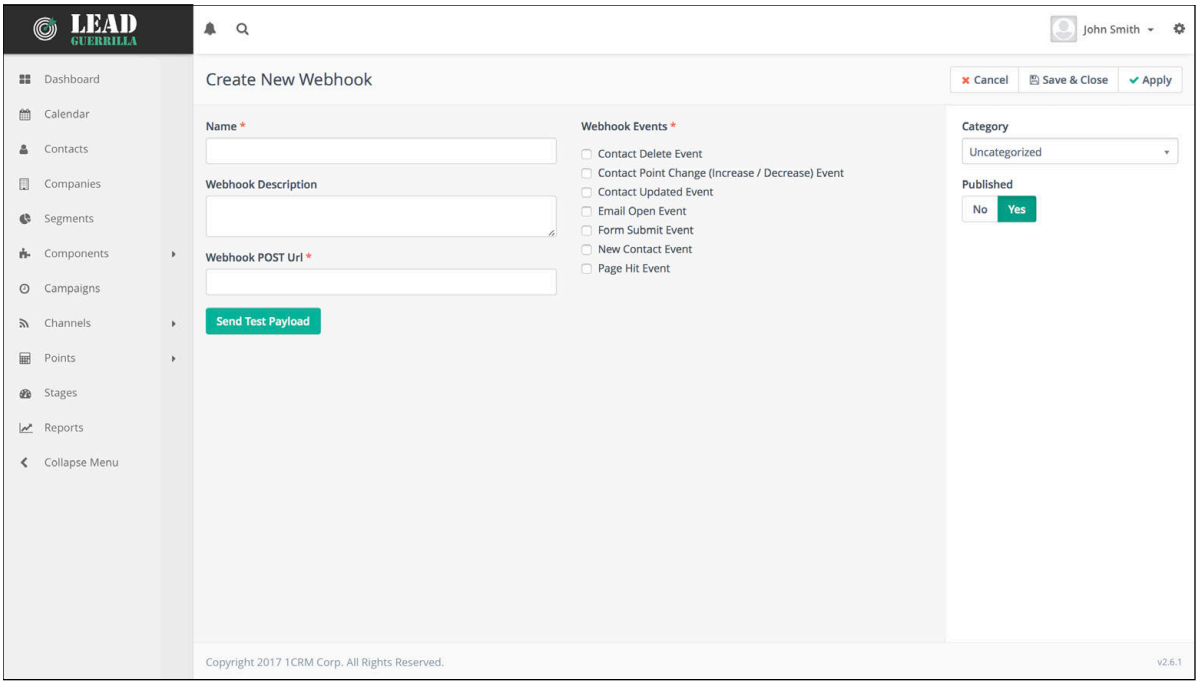

Figure 71: Creating a New Webhook

Webhooks are a universal way to send data about Contacts, Pages, Forms and Events. The data are sent in real-time when an action occurs so the receiving system can process them without the need for periodic scanning to check if Lead Guerrilla has new data.

Create a Webhook

It is possible to create multiple different Webhooks, allowing you to send different information to different applications or scripts.

1. Click on the ⚙ icon top right, and select *Webhooks* from the Settings menu. This page will let you list, add or delete Webhooks from your Lead Guerrilla system.
2. Create a new Webhook, by clicking on the + New button top right.
3. Fill in a *Name*, *Webhook POST URL* (see the next paragraph if you don't have one) and select what *Webhook Events* should trigger this Webhook.

Available Webhook Actions

Lead Guerrilla can send a Webhook payload whenever any of these actions happen:

- Contact deleted
- Contact point change
- Contact updated
- Email opened
- Form submitted
- Contact created
- Page hit

The Webhook Workflow

The example workflow below describes a real-life workflow to get an idea of how Webhooks can be used. Let's imagine we have a project management system (PMS) and we want to create a new issue when a Lead Guerrilla Contact submits a form.

1. A Contact submits a Lead Guerrilla form.
2. Lead Guerrilla saves the form.
3. Lead Guerrilla checks if there is a Webhook with the *Form submit* event. If there is, it sends the Webhook payload to the URL address defined in the Webhook.
4. PMS receives the data about the form submission and create a new issue from it.

Test a Webhook

The easiest way to test a Webhook payload is to use a service like RequestBin. RequestBin lets you create a URL which you can set as the Webhook POST URL in Lead Guerrilla. Click the *Apply* button to save your Webhook and then click the *Send Test Payload* button. That will send a test payload to RequestBin and you will be able to see it in your RequestBin screen.

When you have your testing Webhook created, you can test the real data it sends when a defined action is triggered.

5.2.9 Custom Fields

Click on the ⚙ icon top right, and select *Custom Fields* from the Settings menu. This page will let you view all existing Contact and Company fields as well as any custom fields you've created for either of these objects.

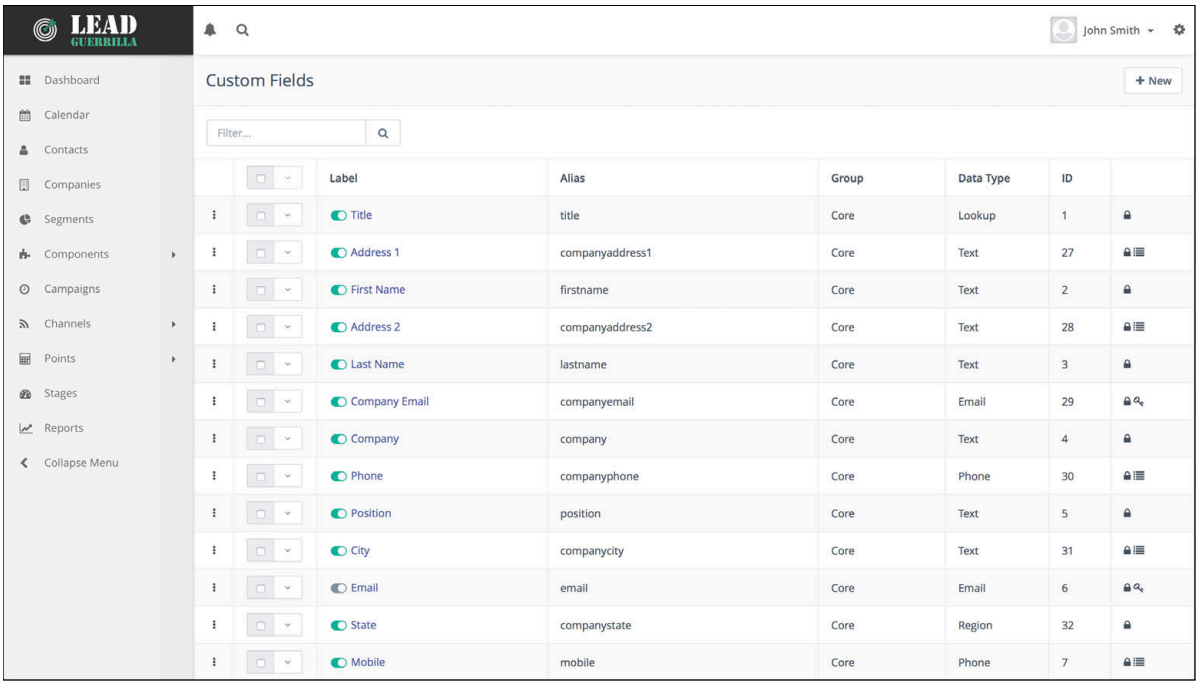

Figure 72: Custom Fields

You will notice the group column which will show you where the specific field will be shown on the screen (which panel of the Contact or Company detail and edit screens). In the last column, you may see several icons which signify various properties of the field:

1) Lock icon - These fields are unable to be removed as they are used by the core installation.
2) List icon - These fields can be used as filters of segments.
3) Asterisks icon - These fields are required when filling in the Contact form, such as Company Name
4) Globe icon - These fields are publicly updatable through the tracking pixel URL query (see the section on Contact Monitoring for more details).

Published Fields

The toggle control which shows before each label title is clickable, and is used to publish and un-publish the field.

New Field

You can create additional custom fields and define the data type you want that field to hold. In addition to the data type you can also select the group for that particular field. Options for data type include: Boolean, Date, Date/Time, Email, List - Country, Locale, Lookup, Number, Phone, Region, Select, Select Multiple, Text, Text area, Time, Time zone, and URL.

5.2.10 Plugins

Plugins are a key part of Lead Guerrilla, allowing the product to be extended easily to work cooperatively with other products and services. Check out the Figure below. When you first visit your Plugins page there will likely be no plugins visible. Just click on *Install / Upgrade Plugins*, and they will appear as shown. Over time more and more plugins will be added, so there is a filter control on this screen to allow you to focus on just the type of plugin you want.

You just click on each plugin icon to set it up for use. Typically a plugin will need you to enter credentials to permit integration with another system to begin. There may also be some configuration parameters to control that integration, such as 1-way or 2-way sync.

The 1CRM integration itself is performed partly by the 1CRM plugin here (which passes data to 1CRM) and partly by a Lead Guerrilla integration feature in 1CRM (which passes data to Lead Guerrilla). As Lead Guerrilla typically performs a sync with external systems via their plugins using a periodic check (a *Cron* task, for those familiar with these - see more details in Chapter 10) 1CRM does its part of the sync itself to enable essentially real time transfer of data to Lead Guerrilla.

More details of the 1CRM plugin are included in the next section, which deals with the overall 1CRM integration.

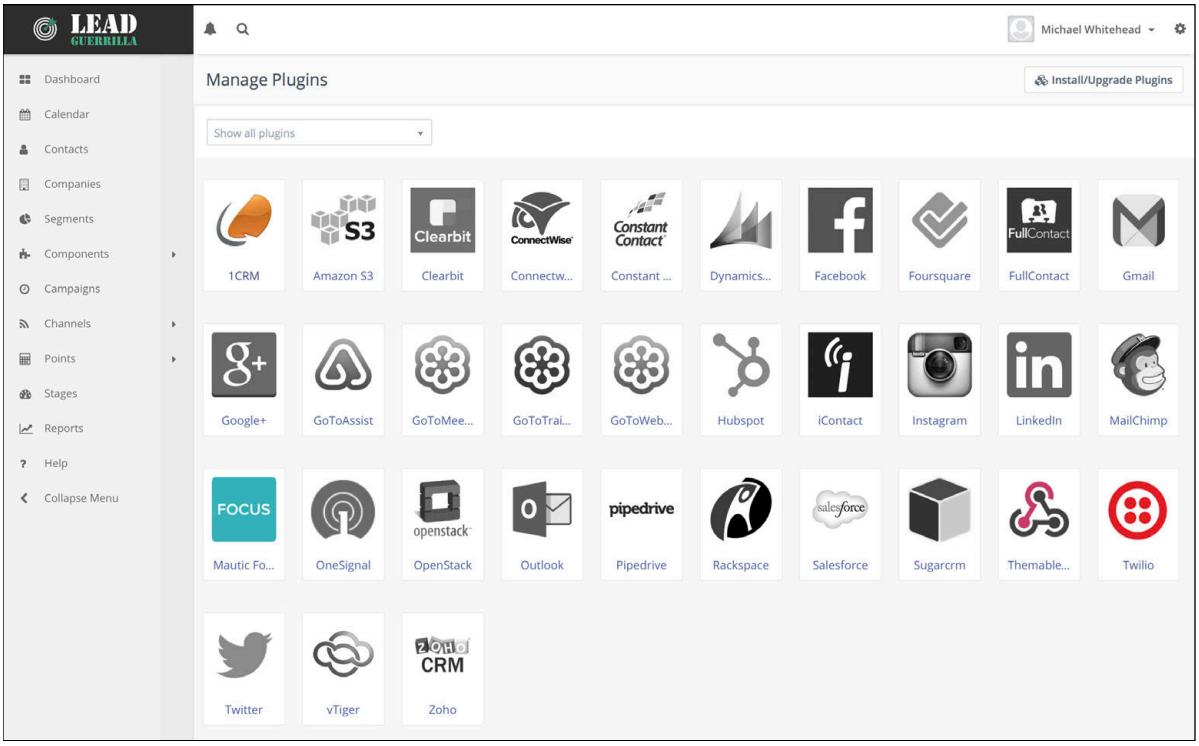

Figure 73: Plugins

6.0 1CRM Integration

Lead Guerrilla can synchronize with its stable-mate, the core 1CRM product from 1CRM Systems. This integration enables Lead Guerrilla Contacts to automatically update 1CRM Leads or Contacts, and vice versa. The process of linking a 1CRM instance with a Lead Guerrilla instance is as follows:

(We use the example here of a Lead Guerrilla instance at http://example.leadguerrilla.cloud, and a 1CRM instance at https://example.1crmcloud.com.)

6.0.1 One-Way or Two-Way Sync?

A useful aspect of the 1CRM to Lead Guerrilla Sync is that there are two parts to it - one part in 1CRM, and one in Lead Guerrilla (the Plugin). Should you wish your sync between them to be two-way, just follow all the instructions below. If on the other hand, you'd prefer it to be only one-way you can do that too.

- One-way sync: Lead Guerrilla --> 1CRM - Just enable and configure the Lead Guerrilla Plugin, and do not configure the 1CRM end.
- One-way Sync: 1CRM --> Lead Guerrilla - Just configure the 1CRM settings for Lead Guerrilla Sync, and do not enable and configure the Lead Guerrilla Plugin.

6.0.2 Configure the Lead Guerrilla Plugin

1. In 1CRM, enable the REST API (see 1CRM Implementation Guide Section 7.8.1). You may also choose whether or not to *Allow API calls via insecure connections (http://).*
2. In 1CRM, go to *API Clients* in Admin (see 1CRM Implementation Guide Section 7.8.2), and create a new API Client. Give it a name, and set *Enabled Grant Types* to *Client Credentials*. Make sure it is Enabled, and select a user. Requests from Lead Guerrilla will be executed on behalf of the selected user. Save the record, then change the *API Secret*. Take a note of the *API Secret* and the *Client ID*.
3. In Lead Guerrilla, click on the ⚙ icon then select *Plugins* from the Settings menu. Click on the 1CRM plugin, to edit its configuration. Set *App ID* and *App Secret* to those from the previous step, and the 1CRM URL to https://example.1crmcloud.com. On the Features tab, choose to Sync to *Leads* or to *Contacts* - and be sure to coordinate this setting with your choice in the next section! Then choose to sync all Lead Guerrilla Contacts, or only those in one or more specific Segments.

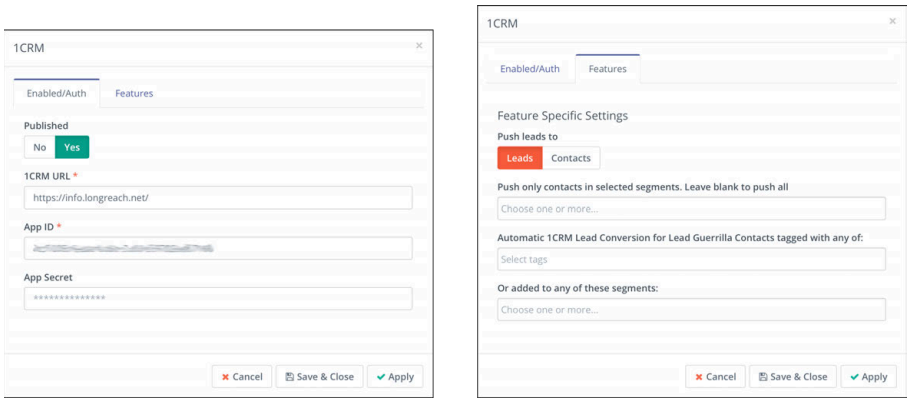

Figure 74: Lead Guerrilla - 1CRM Plugin Settings

6.0.3 Configure the 1CRM Settings for Lead Guerrilla Sync

1. Within *Configuration*, select *API Settings*, and enable the API, then *Save* the configuration.

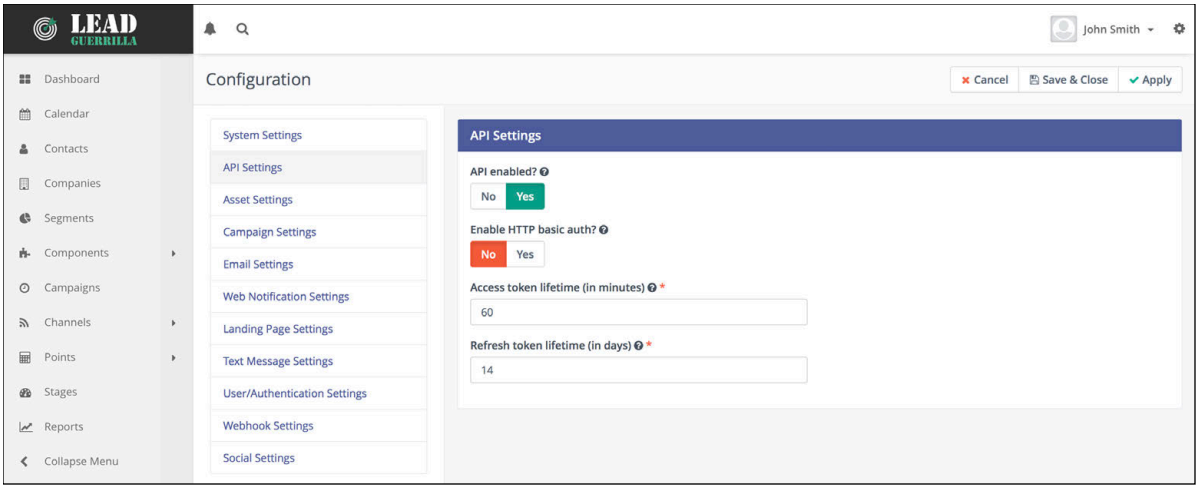

Figure 75: Lead Guerrilla - API Settings

2. Now a new option is available in the Lead Guerrilla ⚙ Settings menu - *API Credentials*. Select it, then click *New*. Make sure *Authorization Protocol* is set to *OAuth 2*.

   Enter a name, for example `1CRM`. For *Redirect URI*, enter `https://example.1crmcloud.com/index.php?module=LeadGuerrilla`

   Click *Apply*, then *Save & Close*. Note the *Client ID (Public Key)* and *Client Secret (Secret Key)*.

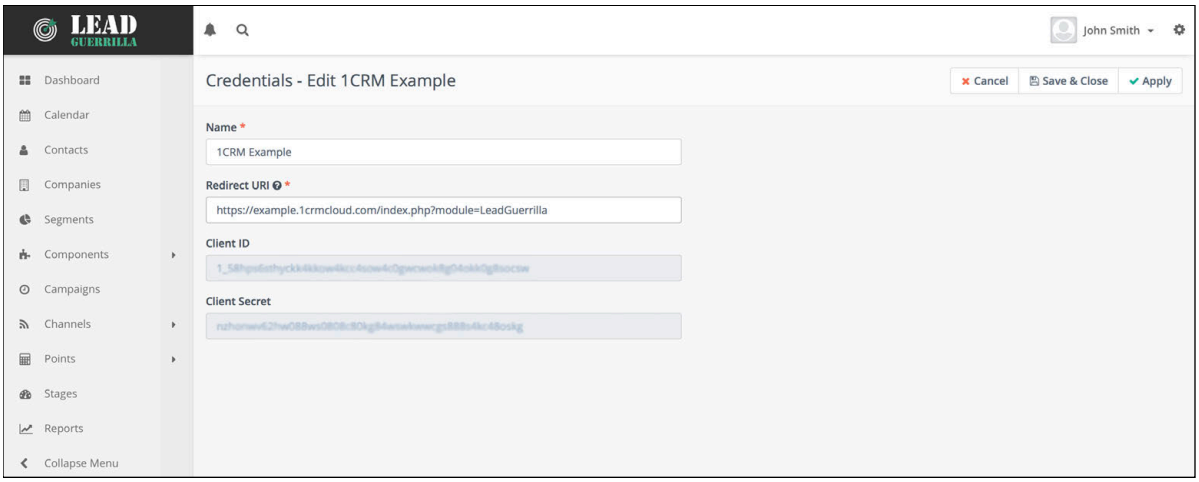

Figure 76: Lead Guerrilla - API Credentials

3. In 1CRM, go to *Lead Guerrilla API Settings* in Admin. Check *Enable* and choose *Leads, Contacts* or *Contacts and Unconverted Leads* to send to Lead Guerrilla - and and be sure to coordinate this setting with your choice in the previous section! (If you choose *Contacts and Unconverted Leads* here, then choose *Leads* when configuring the Lead Guerrilla plugin.) Next enter the *Lead Guerrilla URL*, *API Client ID* and *API Client Secret* from the previous step, then *Save*. This ongoing bi-directional sync is complemented by the option to perform an automated initial push of 1CRM data into Lead Guerrilla.

4. In 1CRM, return to *Lead Guerrilla Settings* and click *Authorize*. A window opens where you login and then grant 1CRM permissions to access Lead Guerrilla. The window then closes and the 1CRM settings are saved automatically. You're all done!

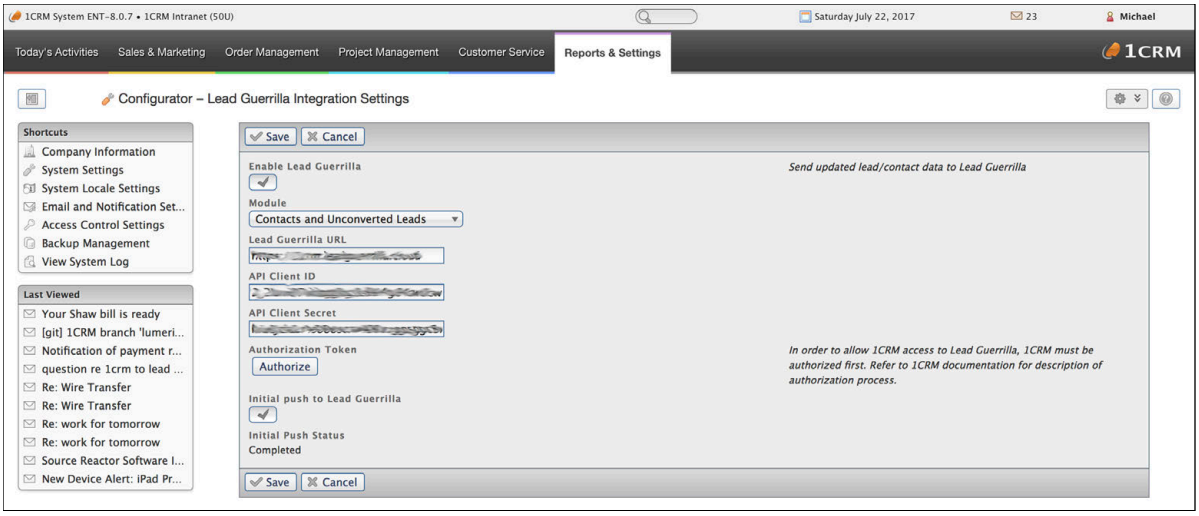

Figure 77: 1CRM - Lead Guerrilla API Settings Screen

6.0.4 1CRM / Lead Guerrilla Field Mapping

When the two systems are linked by the integration process described above, the following fields are mapped by default:

Lead Guerrilla Field Alias	1CRM Field Name
title	title
firstname	first_name
lastname	last_name
company	account_name
phone	phone_work
mobile	phone_mobile
fax	phone_fax
address1, address2	primary_address_street
city	primary_address_city
state	primary_address_state
zipcode	primary_address_postalcode
country	primary_address_country
website	website

Mapping 1CRM Checkboxes to Lead Guerrilla Tags

In addition to the standard fields which are mapped between Lead Guerrilla and 1CRM, their integration offers the option to custom map fields between the two systems, to promote even tighter coordination of your business processes which span them.

One extremely useful ability allows you to map 1CRM *Checkbox* fields within the Leads and/or

Contacts modules to *Tags* on Contacts within Lead Guerrilla. Simply create custom *Checkbox* fields in the Leads and/or Contacts modules within 1CRM and matching Tags will be created within Lead Guerrilla, and the two corresponding elements will sync values with each other.

Note: These 1CRM fields must have names starting with tag_, followed by the tag name, with spaces replaced with underscores. Field names are limited to using only letters and digits, and character case matters. For example if you create a field named `tag_Sample_Tag` within the 1CRM Leads module, a tag named Sample Tag will be added to Contacts in Lead Guerrilla and then synced with 1CRM.

Mapping Lead Guerrilla Fields to 1CRM Custom Fields

Fields within Lead Guerrilla Contacts can be mapped to custom fields in 1CRM. Simply create a custom field in 1CRM with Lead Guerrilla's field *Alias*, prefixed with `lg_`. For example, to sync the `points` field we see on each Contact in Lead Guerrilla, create a corresponding custom *Integer* field in the 1CRM Leads and/or Contacts modules called `lg_points`.

Mapping 1CRM Leads/Contacts Fields to Lead Guerrilla Custom Fields

if you create a custom field in Lead Guerrilla Contacts with an *Alias* that starts with `_onecrm_`, it will try to sync with a corresponding field in 1CRM Leads and/or Contacts. For example, imagine you have a `license_key` custom field in 1CRM. If you create a field in Lead Guerrilla with the Alias `_onecrm_license_key` then these fields will be synchronized with each other.

The sync will not happen for existing records though - both 1CRM and Lead Guerrilla only send updates to other side when a Contact/Lead is modified, and this update only includes the fields that have actually changed.

Note: An important thing to keep in mind is that the 1CRM plugin must be aware of what custom fields exist within Lead Guerrilla. To get this information, it asks the Lead Guerrilla API only once, then caches (remembers) the answer for any future synch'ing activities. Accordingly, any time you modify the fields in Lead Guerrilla, you must clear the 1CRM cache using the *Clear Cache* option in the *Maintenance* screen within the 1CRM admin pages.

7.0 1CRM / Lead Guerrilla Plugin

This WordPress Unified Lead Plugin (available here) can capture lead data from a page in your WordPress-based website, and insert that new lead as a Contact in Lead Guerrilla, as a Lead in 1CRM, or both.

First you'll need to download it from the link above, and install it as a WordPress plugin. it will show up like this:

Figure 78: WordPress Plugin Installed

You will also gain a new section in WordPress administration for this Plugin. Your next step will be to go there, and Add a new Form:

Figure 79: Universal Forms Section in WordPress Admin

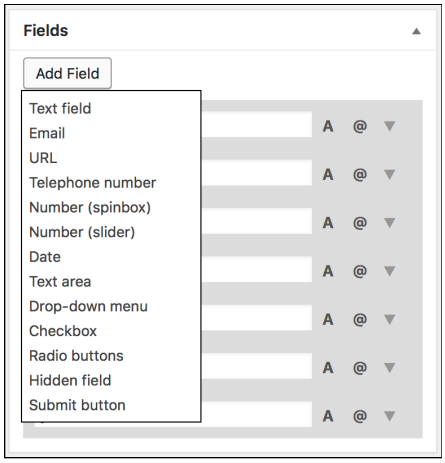

Figure 80: Lead Plugin - Available Field Types

7.1 Edit a Lead Form in the Plugin

When you edit a new form, you'll see a screen like the Figure below. You will need to:

- Set a Form Name
- Add Form Fields, choosing the type of field for each (see list above)

- Use the **A** and **@** controls for each Form field to add your fields into the Form (**A**) or the Email text (**@**). Use the ▼ control to edit the parameters for each field.
- Fill in Your Email Settings and Information
- In the *Options* panel, define if you are sending Lead data to 1CRM, Lead Guerrilla or both - for each your choices are *Disabled*, *Create*, or *Create or Update*
- Note - the *Messages* panel will show you any issues detected as you use the Form
- Click on *Save* to save the Form

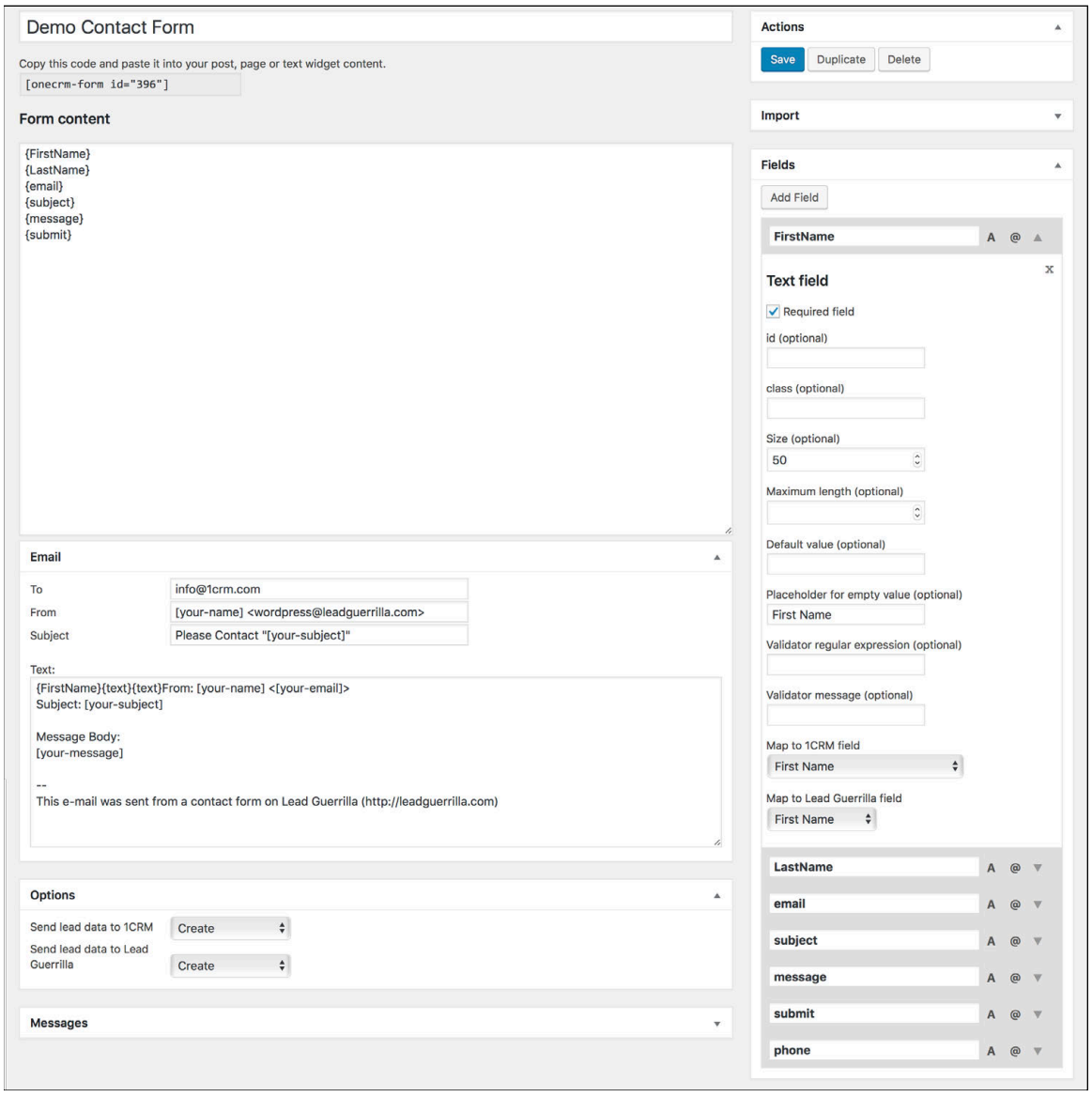

Figure 81: Creating a New Lead Form

Having created the Form definition, now all we need to do is use the Form on a webpage. Create a new page in your WordPress system, and you will use the *onecrm-form-id* shortcode on it to reference the Form you want inserted into your page. Once that page is created, saved and published, you can navigate to the page and try out your new Form!

Note: In some sites it is possible that the CSS from your theme sets all your form's text inputs to a fixed width. If you experience this issue you may want to add some custom CSS so that the width of inputs inside these forms is controlled by the *Size* parameter instead.

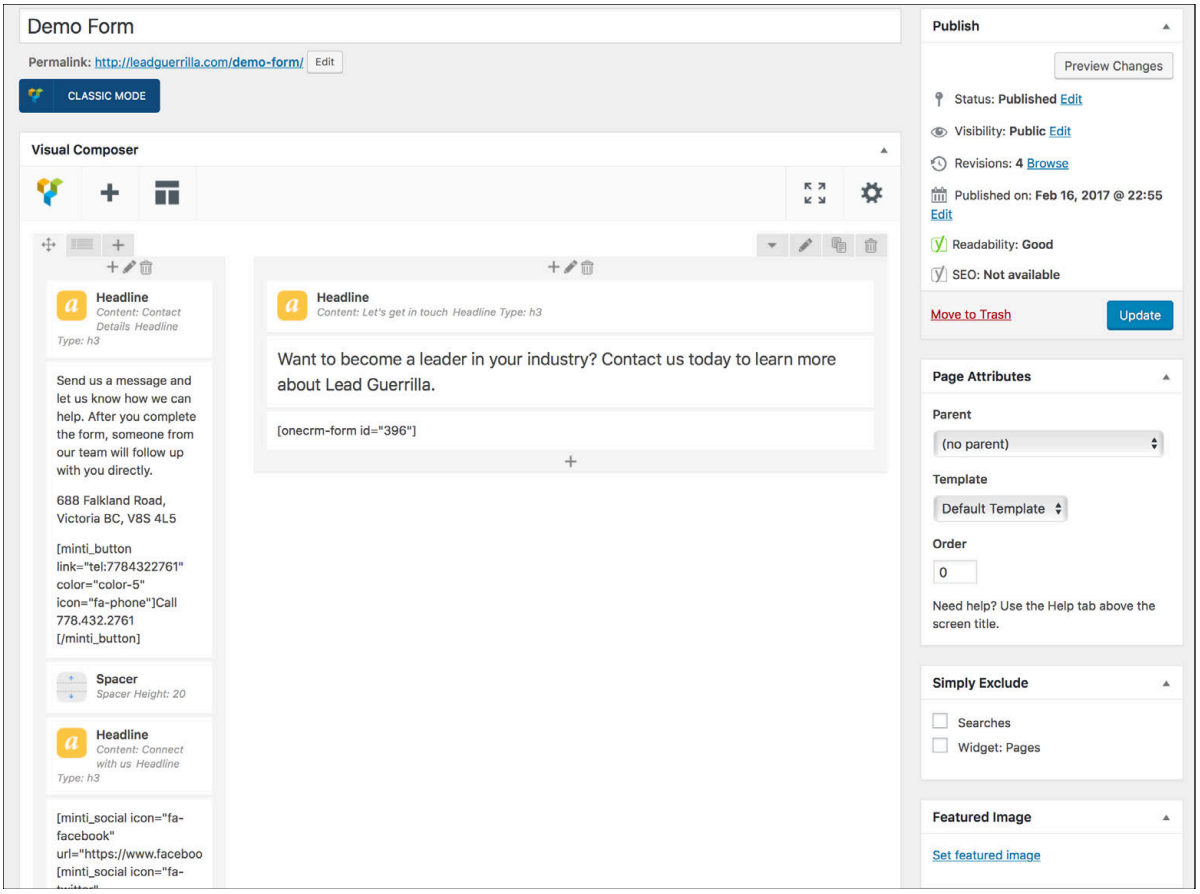

Figure 82: Creating a Page and Insert the Form Shortcode

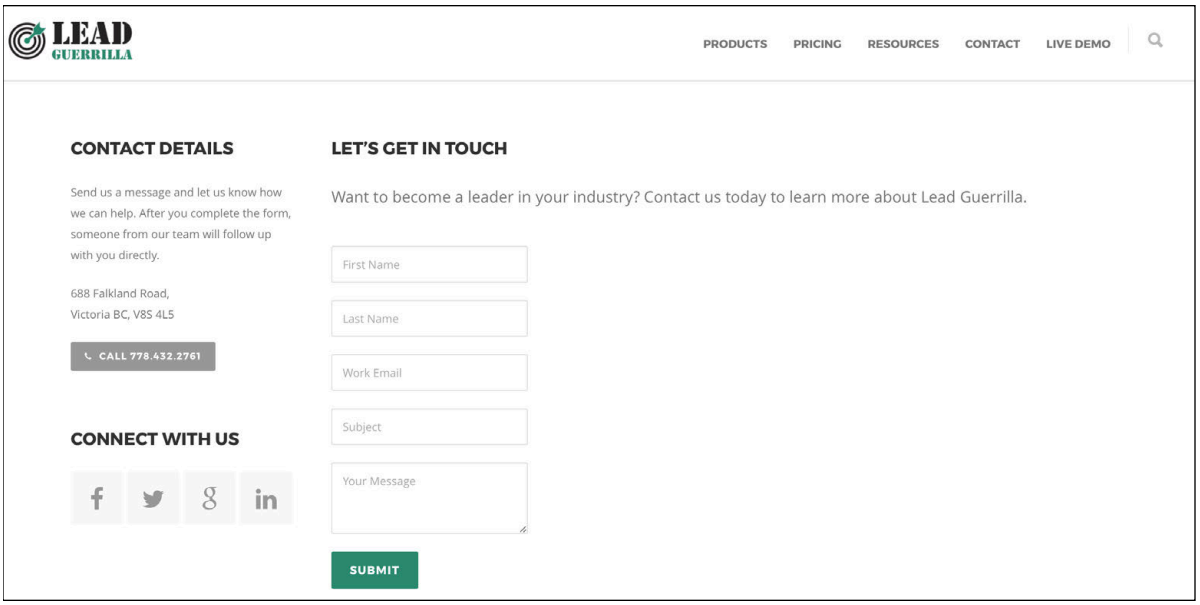

Figure 83: The Final Result

8.0 Content Management Plugins

Lead Guerrilla makes website tracking and lead forms handling easy by providing key integrations to many existing content management systems. You can download and use any of the following plugins to automatically add visitor tracking and lead forms to your website.

Note: The information presented is this section is only relevant for your System Administrator.

8.1 WordPress Tracking & Forms Plugin

WordPress is open source content management software designed for creating great websites and blogs. It relies on a system of templates and plugins for its remarkable flexibility, which in turn has led to its enormous popularity.

WordPress started in 2003, and since then it has grown to be the most popular content management system in the world, used on over 60 million websites – or over 27% of all Internet sites.This plugin adds Lead Guerrilla visitor tracking and lead forms capabilities to your WordPress website.

Key features

- No need to manually edit the source code of your template to insert the tracking code.
- The plugin adds additional tracking information for better results than simply using the plain tracking code.
- The plugin enables you to insert Lead Guerrilla Forms into your WordPress pages by simply using the shortcode described below.
- You can choose where the tracking script is to be added (header or footer).

8.1.1 Installation

1. Download the ZIP package.
2. Within WordPress administration go to *Plugins / Add New / Upload plugin*.
3. Select the ZIP package you've downloaded above.

8.1.2 Configuration

The plugin should now be visible in your plugin list :

1. Enable it.
2. Go to the settings page and set the URL of your Lead Guerrilla instance.

And that's it !

8.1.3 Usage

Lead Guerrilla Tracking Script

The tracking script works right away once you finish the configuration steps. That means it will insert the mtc.js script from your Lead Guerrilla instance. You can check the HTML source code (CTRL + U) of your WordPress website to make sure the plugin works. You should be able to find something like this:

```
<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','http://yourLGsite.com/mtc.js','mt');
    mt('send', 'pageview');
</script>
```

Custom attributes handling

If you need to send custom attributes within Lead Guerrilla events, you can use the `wpmautic_tracking_attributes` filter.

```
add_filter('wpmautic_tracking_attributes', function($attrs) {
    $attrs['preferred_locale'] = $customVar;
    return $attrs;
});
```

The returned attributes will be added to the payload.

8.1.4 Forms, Dynamic Content, Gated Videos and Tags

To add a Form anywhere on a WordPress page, simply insert this shortcode where you want the form to appear:

```
[mautic type="form" id="1"]
```

Replace "1" with the form ID you want to load. To get the correct ID of the form you want to use, go to your Lead Guerrilla system, open the form detail screen and look at the URL. The ID is right there. For example in this URL: `http://myLeadGuerrilla.com/s/forms/view/3` the value of ID is 3.

Dynamic Content

To load dynamic content into your WP content, insert this shortcode where you'd like it to appear:

```
[mautic type="content" slot="slot_name"]Default content to display in case of
error or unknown contact.[/mautic]
```

Replace the *slot_name* with the slot name you'd like to load. This corresponds to the slot name you defined when building your campaign and adding the *Request Dynamic Content* contact decision.

Gated Videos

Lead Guerrilla supports gated videos with Youtube, Vimeo, and MP4 as sources.

To load gated videos into your WP content, insert this shortcode where you'd like it to appear:

```
[mautic type="video" gate-time="#" src="URL"]
[mautic type="video" src="URL"]
```

Replace the # sign with the appropriate number. For gate-time, enter the time (in seconds) where you want to pause the video and show the Lead Guerrilla form. Replace URL with the browser URL to view the video. In the case of Youtube or Vimeo, you can simply use the URL as it appears in your address bar when viewing the video normally on the providers website. For MP4 videos, enter the full `http://` URL to the MP4 file on the server.

Tags

You can add or remove multiple lead tags on specific pages using commas. To remove a tag you use the minus "-" sign in front of the tag name:

```
[mautic type="tags" values="mytag,anothertag,-removetag"]
```

8.2 Joomla! Tracking & Forms Plugin

Joomla! is an extremely popular open source content management system (CMS), second only to WordPress. Its ease-of-use and extensibility, as well as its PHP code base have made Joomla! particularly popular for creating transactional websites.

Joomla is a completely free open source solution available to anyone and everyone with a desire to build dynamic and robust sites for a variety of purposes – and is backed by a large and active developer community. With thousands of unique and useful extensions and templates available, it is presently one of the largest single site building platforms available.

Joomla's primary focus has been on usability and extensibility since its initial release in 2005. It is because of this that the project has been the recipient of numerous awards, including being a three-time recipient of the PACKT Open Source Content Management System Award.This plugin adds Lead Guerrilla visitor tracking and lead forms capabilities to your Joomla! website. Once authorized, the plugin will be able to push lead data from Joomla! registration forms to Lead Guerrilla. This plugin is compatible with Joomla! 2.5.x and 3.x.x.

8.2.1 Visitor Tracking for Joomla! Sites

Visitor tracking will work right away, once you enable the plugin, insert `Base URL` and save the plugin. This will insert a tracking image loaded from your Lead Guerrilla instance. You can check the HTML page source (CTRL + U) of your Joomla website to make sure the plugin works. You should be able to find something like this:

```
<img src="http://myLeadGuerrilla.com/mtracking.gif"/>
```

There will be probably a longer URL query string at the end of the tracking image URL. It contains additional encoded data about the page (title, url, referrer, language).

8.2.2 Forms, Dynamic Content and Gated Videos

Form

To embed a Lead Guerrilla form into Joomla content, insert this code snippet:

```
{mautic type="form" ID}
```

`ID` is the identifier of the Lead Guerrilla form you want to embed. You can see the ID of the form in the URL of the form detail. For example for the URL `www.myLeadGuerrilla.com/forms/view/1`, the value of ID is 1.

Dynamic Content

To embed Lead Guerrilla dynamic content, insert this code snippet:

```
{mautic type="content" slot="slot_name"}Default content here.{/mautic}
```

`slot_name` is the identifier of the slot that you specified when adding a *Request dynamic content* decision to your campaign.

Gated Videos

Lead Guerrilla gated video supports YouTube, Vimeo, and MP4. If you want to use gated video on a Vimeo video, you must manually include the Froogaloop javascript. Also, to use gated video, you must manually include the jQuery javascript library on your page.

To embed Lead Guerrilla gated videos, insert this code snippet:

```
{mautic type="video" height="320" width="640" src="https://www.youtube.com/
watch?v=QT6169rdMdk" gate-time="15" form-id="1"}
```

Note, you must replace the `src` value with the actual URL for your video. Height and width attributes are optional, and will default to the values shown if omitted. Gate time is the time, in seconds, that you would like to pause the video and display the form that you entered as the `form-id`.

8.2.3 Plugin Authorization

It is possible to send Lead data to Lead Guerrilla via API only after authorization. You can create specific authorization API credentials for each application. To do that, go to your Lead Guerrilla administration screen and follow these steps:

1. Go to the Lead Guerrilla Configuration / API Settings and set *API enabled* to *Yes*, and leave *API mode* set to *OAuth1*. Save your changes.
2. On the right-hand side menu near Configuration there should now appear a new menu item *API Credentials*. Click on it.
3. Create a new set of credentials. Fill in values for *Name* (for example, *Joomla plugin*) and set the Callback URL to `http://{yourJoomla.com}/administrator` (edit {yourJoomla.com} to the actual URL of your Joomla instance). This URL includes /administrator to ensure that only Joomla admins can authorize the Lead Guerrilla plugin. Now save these credentials.
4. Lead Guerrilla will generate both a *Consumer Key* and a *Consumer Secret* key. Copy those two values to the Joomla plugin, then save the plugin. Click on the *Authorize* button and then follow instructions.

8.3 TYPO3 Tracking & Forms Plugin

TYPO3 is a mature enterprise-ready web content management system built to ease the creation and manipulation of dynamic content for public websites and intranets. TYPO3 has several comparative advantages: Highly flexible, scaleable and customizable; Rich options for levels of administration; A mature product with strong Enterprise level capabilities.

TYPO3 provides the basis for websites, intranets and web & mobile applications worldwide – always with a focus on the current needs of businesses and public institutions.This plugin adds Lead Guerrilla visitor tracking and lead forms capabilities to your TYPO3 website.

Key features

- Create forms in TYPO3 and automatically sync them with your Lead Guerrilla installation (supports create, duplicate, edit and delete)
- Send form data directly to Lead Guerrilla
- Create a contact in Lead Guerrilla from data collected in TYPO3 forms
- Integration of the Lead Guerrilla tracking script

Don't forget to use the extension configuration to set up TYPO3 with the details of your Lead Guerrilla system. Tracking is also disabled by default, so be sure to use the extension configuration to turn it on.

8.3.1 Installation (via Composer) (recommended)

Add the following to the composer.json of your TYPO3 installation

```
"repositories": [
    { "type": "vcs", "url": "git@github.com:mautic/mautic-typo3.git" }
    ],
require {
    "mautic/mautic-typo3": "^1.3"
}
```

Run the following command:

```
$ composer install
```

Go into the TYPO3 backend, to the Extensions module, and enable the *Mautic* extension.

8.3.2 Installation (without Composer)

When retrieving the file from TER you can install this file using the extension manager.

If you want to build the latest master you need to create the extension zip file:

- Clone package
- Run composer run-script package
- A mautic.zip is created, this file can be imported by your extension manager

8.4 Drupal Tracking & Forms Plugin

Drupal is an open source content management software platform for building amazing digital experiences. It's made by a dedicated community. Anyone can use it, and it will always be free. It's used to make many of the websites and applications you use every day.

Drupal has great standard features, like easy content authoring, reliable performance, and excellent security. But what sets it apart is its flexibility; modularity is one of its core principles. Its tools help you build the versatile, structured content that dynamic web experiences need.This Drupal 6 module adds Lead Guerrilla visitor tracking and lead forms capabilities to your Drupal website.

8.4.1 Key features

- No need to manually edit the source code of your template to insert the tracking code.
- The plugin adds additional tracking information for better results than simply using the plain tracking code.
- The plugin enables you to insert Lead Guerrilla Forms into your Drupal pages by simply using the code snippet described below.

8.4.2 Installation

1. Download the zip format Drupal installer package.
2. Unzip the downloaded file to your Drupal instance into sites/all/modules. (read more)
3. Go to *Administer / Site building / Modules*
4. The new module should be listed at the bottom. Enable it.
5. Go to *Administer* / *Mautic* and insert your Lead Guerrilla base URL, then save it.
6. Go to *Administer* / *Site building* / *Blocks* and drag & drop the Mautic Tracker from *Disabled* into *Footer* position. Save blocks.

8.4.3 Lead Guerrilla Tracking Image

The module will insert a tracking image loaded from your Lead Guerrilla instance. You can check the HTML source code (CTRL + U) of your Drupal website to make sure the plugin works. You should be able to find something like this:

```
<img src="http://myLeadGuerrilla.com/mtracking.gif"/>
```

There will probably be a longer URL query string at the end of the tracking image URL. It contains additional encoded data about the page (title, url, referrer, language).

8.4.4 Form Embedding

To embed a Lead Guerrilla form into Drupal content, insert this code snippet:

```
{mauticform id=ID width=300px height=300px}
```

ID is the identifier of the Lead Guerrilla form you want to embed. You can see the ID of the form in the URL of the form detail screen. For example for `www.myLeadGuerrilla.com/forms/view/1`, the value of ID is 1.

9.0 Email Configuration Details

Note: The information presented is this section is only relevant for your System Administrator.

9.1 Emailing with Lead Guerrilla

There are two types of emails in Lead Guerrilla: Template emails and Segment emails (or B*roadcasts*).

9.1.1 Template Emails

Template emails are transactional by default and can be used in campaigns, form submit actions, point triggers, etc. These can be sent to the same contact as many times as needed.

9.1.2 Segment Emails (*Broadcasts)*

These are typically marketing emails. Segments are assigned to the email that determine which contacts will receive the communication. Each contact can only receive the email once, similar to a mailing list.

These emails are sent via the optional `broadcasts:send` Cron task.

9.1.3 Email Formats

Emails can be created in HTML and Text formats, to be delivered as necessary to contacts. Providing information in their preferred format is a valuable part of creating a strong relationship with contacts.

9.1.4 Email Delivery

If you are the Lead Guerrilla system administrator for your company, then you will need to select and configure the email delivery method for your system to use. Lead Guerrilla integrates with any email service provider which offers generic SMTP service as well as several speciality services such as Gmail, Sendgrid, Mailjet, Postmark, Sendmail, Elastic Email and Amazon SES.

The email delivery method is configured using the Lead Guerrilla ⚙ *Settings menu - Configuration - Email Settings* screen, in the *Mail Send Settings* panel as seen below. Two very important settings are to choose the *Service to send mail through (options are: Amazon SES, Elastic Email, Gmail, Mandrill, Mailjet, Other SMTP Server, PHP Mail, Postmark, Sendgrid, Sendmail, Sparkpost)*, and *How should email be handled* (*Send Immediately*, or *Queue*).

Service to send mail through should be set to *Other SMTP Server* if you are not using one of the other specific services. If you are using *Elastic Email*, *Amazon SES*, *Mailjet* or *Sparkpost*, see further details in the following sections.

Lead Guerrilla can either send emails immediately or queue them to be processed in batches by a Cron task. *How should email be handled* should typically be set to *Queue* if you ever send over 500 emails in a campaign, to avoid system performance delays.

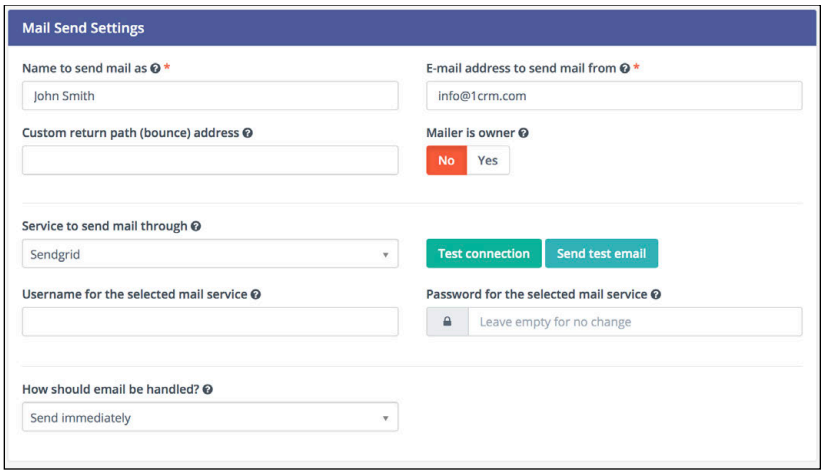

Figure 84: Mail Send Settings

9.1.5 Immediate Delivery

This is the default means of delivery. Lead Guerrilla sends the email as soon as it is instructed to by the triggering action. If you expect a large number of emails to be sent, then utilizing the queue is recommended. Sending email immediately may slow the response time of Lead Guerrilla if using a remote mail service since Lead Guerrilla has to establish a connection with that service before sending the mail. Also attempting to send large batches of emails at once may hit your server's PHP limits or email limits if on a shared host.

9.1.6 Queued Delivery

This is recommended if you plan to send a significant number of emails. Lead Guerrilla will store the email in the configured spool directory until the command to process the queue is executed. Your Lead Guerrilla cloud service uses the `emails:send` Cron task to send queued email.

Some SMTP services may have limits on the number of emails that can be sent during a specified timeframe. If that's the case for you, or if you just want to limit the performance impact of processing batches of emails, you can configure batch numbers and time limits in Lead Guerrilla's Configuration.

9.1.7 Email Fields

You have access to many contact fields to be used in your form emails. These can be easily placed within your emails and will be automatically replaced with the appropriate text once the email is sent.

9.1.8 Tracking Opened Emails

Each email sent through Lead Guerrilla is tagged with a tracking pixel image. This allows Lead Guerrilla to track when a contact opens the email and execute actions accordingly. Note that this technique is limited to the contact's email client supporting HTML and auto-loading of images. If the email client does not load the image, there is no way for Lead Guerrilla to know if the email was opened.

9.1.9 Tracking Links in Emails

Clicks of each link in an email are tracked and those clicks count can be found at the bottom of email detail page under the *Click Counts* tab.

9.2 Bounce Handling

Overview

Lead Guerrilla includes a feature which enables the detection of bounced emails and unsubscribe requests when monitoring IMAP accounts. This feature makes use of *append* email addresses. The return-path or the list-unsubscribe header will use something like:

```
youremail+bounce_abc123@your-domain.com
```

The `bounce` or `unsubscribe` portion of the email address enables Lead Guerrilla to decide what type of email it is when it examines the inbox through IMAP. The `abc123` gives Lead Guerrilla information about the email itself (i.e. what contact it was it sent to, what Lead Guerrilla email was used, etc..).

Some email services overwrite the return-path header with that of the account's email (Gmail, Amazon SES). In these cases, bounce monitoring will not work. SparkPost, Mandrill, and Amazon SES support webhook callbacks for bounce management. See below for more details.

Detailed Usage

If you configure the *Monitored Inbox Settings* within Lead Guerrilla (which is highly recommended) these settings will be used to manage the way in which the system handles bounces and unsubscribes. If these settings are configured (using Lead Guerrilla ⚙ *Settings menu - Configuration - Email Settings*, as discussed in the next section*)* then when an email is sent, a special *append* email address is generated for use by the *MAIL FROM* command of the SMTP email protocol.

Note: This is not the same as the *FROM* address you see when viewing email normally.

For example, if the *FROM* address is `charlotte@mycompany.com`, then the *MAIL FROM* address used will be `charlotte+bounce@mycompany.com`. The recipient of the email will still see `charlotte@mycompany.com` as the sender's address, but if the email bounces due to non-delivery the email server will send a bounce notification to `charlotte+bounce@mycompany.com`. And so when Lead Guerrilla receives a bounce email like this it can be certain it is a bounce notification and act accordingly.

Warning: A *very* common problem arises when configuring bounce handling, that all Lead Guerrilla users should be aware of and make sure they have addressed. As a security measure most SMTP servers will only send out emails for which the *MAIL FROM* address is an address they have been configured to accept as an approved address. So in the above example the SMTP server must be configured to accept both `charlotte@mycompany.com` and `charlotte+bounce@mycompany.com` as valid *MAIL FROM* addresses. Add charlotte+unsubscribe@mycompany.com as well while you are doing that - we'll explain why a bit later on.

9.2.1 Monitored Inbox Settings

To configure the Monitored Inbox Settings simply go to the Lead Guerrilla ⚙ *Settings menu - Configuration - Email Settings* screen and fill in the account details for the inbox(es) you wish to monitor, as shown below.

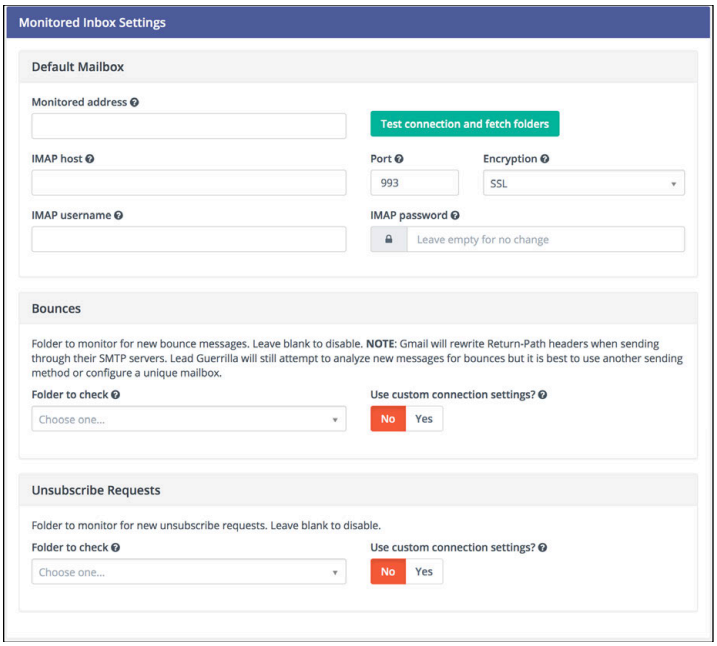

Figure 85: Monitored Inbox Settings

It usual to use just one monitored inbox, but you may optionally configure separate inboxes - one for each of *Bounces* and *Unsubscribes*, by enabling the *Use custom connection settings* toggle switches. When you do their panels expand like this:

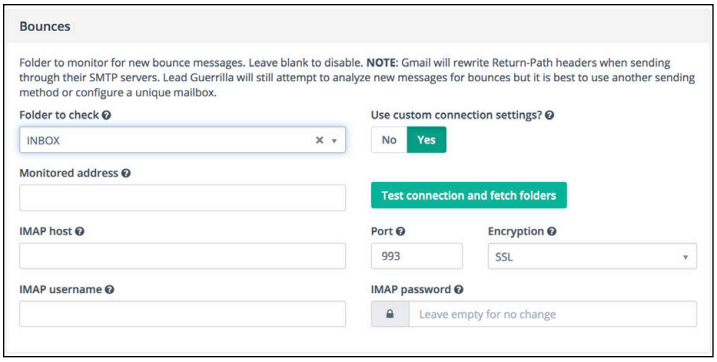

Figure 86: Using Custom Connection Settings for Bounces

To fetch and process the messages, your system uses the `email:fetch:` Cron task.

Note that it is best to create an email address specifically for this purpose, as Lead Guerrilla will read each message it finds in the given folder.

If sending mail through Gmail, the Return Path of the email will automatically be rewritten as the Gmail address. It is best to use a sending method other than Gmail, although Lead Guerrilla can monitor a Gmail account for bounces.

If you select an *Unsubscribe* folder, Lead Guerrilla will also append the email as part of the *List-Unsubscribe* header. It will then parse messages it finds in that folder and automatically unsubscribe the contact.

9.2.2 Create a Segment with Bounced Emails

While not a mandatory requirement, if you like you can create a Segment that contains all your Contacts with bounced emails. It's a handy device in order just to study them, or mass delete them.

1. Go to *Segments - New*.
2. Type in the segment name. For example *Bounced emails*.
3. Select the *Filters* tab.
4. Create a new *Bounced Email* equals Yes filter.
5. Wait for the `segments:update` Cron task to be automatically performed.

All contacts with bounced emails should now appear in this segment.

9.3 Elastic Email Webhook

Lead Guerrilla supports the *Bounce*, *Complaint* and *Unsubscribe* actions of Elastic Email. To configure Elastic Email as your SMTP provider in Lead Guerrilla, follow these steps:

1. In the Lead Guerrilla ⚙ *Settings menu - Configuration - Email Settings* screen set the *Service to send mail through* dropdown to *Elastic Email.*
2. Enter your Elastic Email *Username* and *Password*, and *Apply* settings.
3. Login to your Elastic Email account and go to *Settings - Notifications*
4. Fill in the Notification URL as `http://yourLGurl.com/mailer/elasticemail/callback` where `http://yourLGurl.com` is the URL of your Lead Guerrilla instance.
5. Check these actions: *Unsubscribed*, *Complaints*, and *Bounce/Error*, and then *Save.*

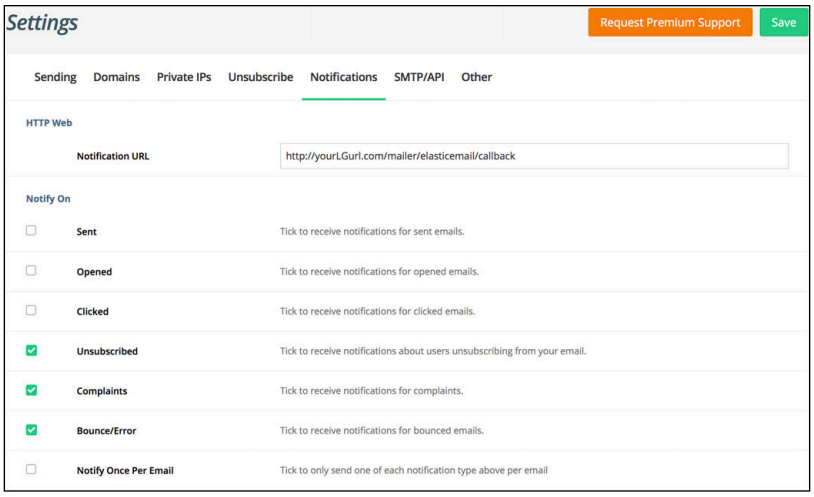

Figure 87: Elastic Email Settings

For more information on Elastic Email, see their Getting Started Guide.

9.4 Amazon Webhook

Lead Guerrilla supports the *Bounce* and *Complaint management* features of the Amazon Simple Email Service (Amazon SES). To configure Amazon SES as your SMTP provider in Lead Guerrilla, follow these steps:

1. In the Lead Guerrilla ⚙ *Settings menu - Configuration - Email Settings* screen, set the *Service to send mail through* dropdown to *Amazon SES.*
2. Then set the *Amazon SES Host* to the SMTP Endpoint that applies for your Amazon SES service, enter your Amazon SES *Username* and *Password*, and *Apply* settings.

   The following table shows the current set of Amazon SES SMTP endpoints for the regions in which Amazon SES is available.

Region name	SMTP endpoint
US East (N. Virginia)	email-smtp.us-east-1.amazonaws.com
US West (Oregon)	email-smtp.us-west-2.amazonaws.com
EU (Ireland)	email-smtp.eu-west-1.amazonaws.com

Figure 88: Amazon SES SMTP Endpoints

3. Go to the Amazon Simple Notification Service (SNS) and create a new topic:

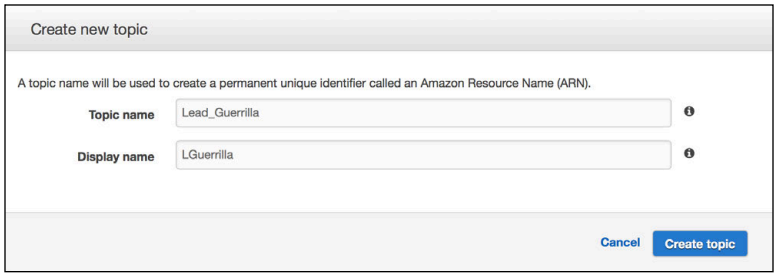

Figure 89: Amazon SNS - Create a New Topic

4. The Figure below shows a newly created topic. Click on the ARN of the new topic to create a subscription:

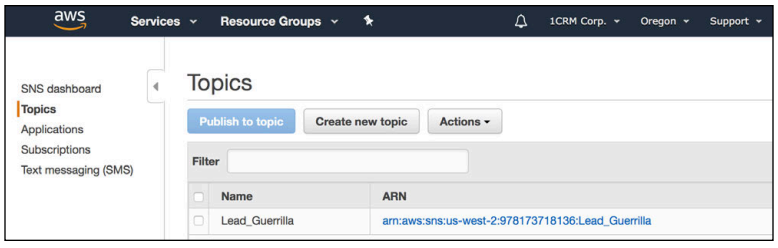

Figure 90: Amazon SNS - New Topic Created

Figure 91: Amazon SNS - Create a New Subscription

5. In the Endpoint field above, enter the URL of the Amazon webhook for your Lead Guerrilla installation:

   `http://yourLGurl.com/mailer/amazon/callback`

   where `http://yourLGurl.com` is the URL of your Lead Guerrilla instance.

6. The subscription will be in the pending state until it is confirmed. AWS will call your Amazon webhook with a SubscriptionConfirmation request including a callback url. To confirm Lead Guerrilla will send a request back to this callback url to validate the subscription. Therefore make sure your Lead Guerrilla installation is allowed to connect to the internet, otherwise the subscription will remain in the pending state and won't work. Check the log file for more information.

Figure 92: Amazon SNS - Pending Subscription

7. Finally, configure Amazon SES to deliver bounce and complaint messages using your SNS topic. Within the SES management console select Domains, and select your verified domain.

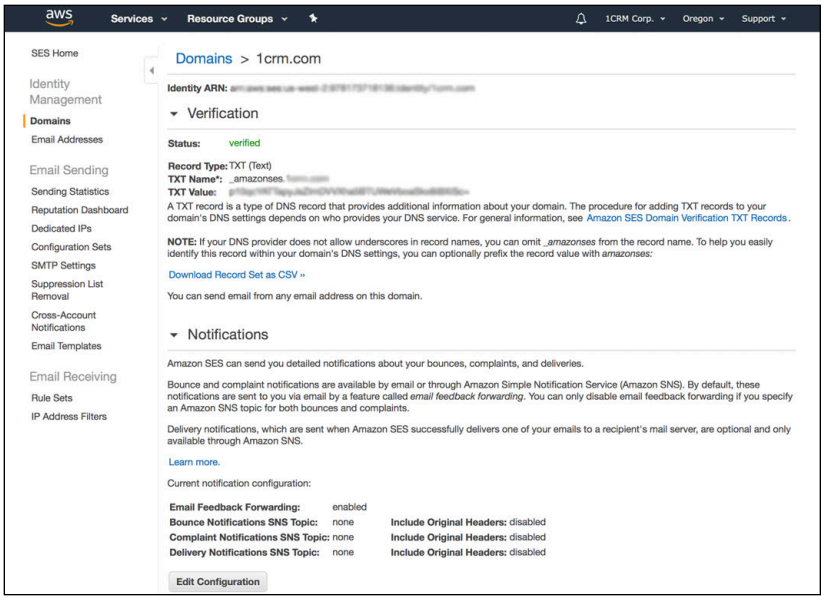

Figure 93: Amazon SNS - Pending Subscription

8. Expand the Notifications panel, as shown above. Click on *Edit Configuration*. Then configure *Bounces* and *Complaints* as shown below, disable *Email Feedback Forwarding*, and *Save Config*.

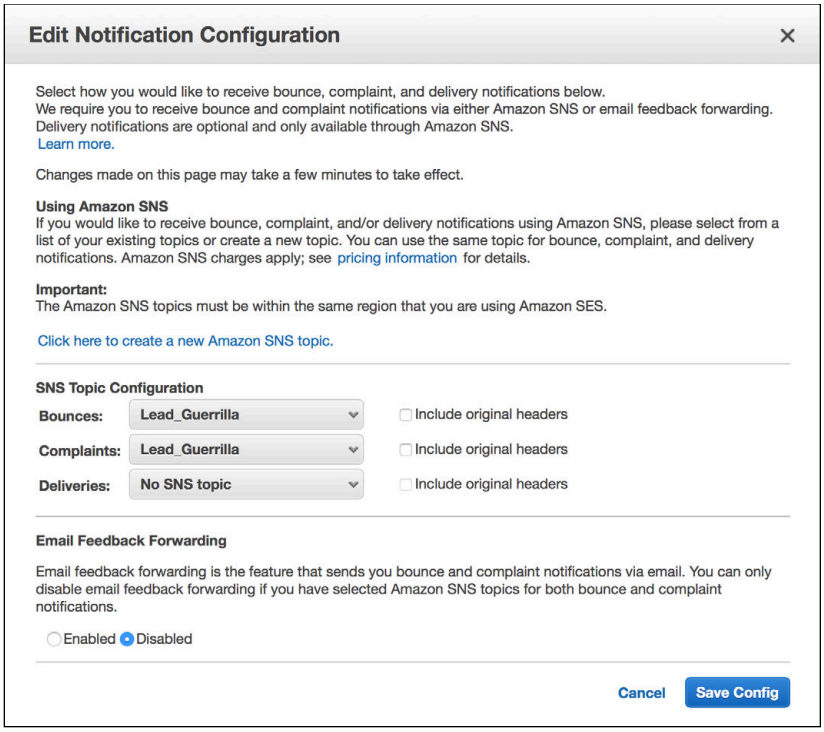

Figure 94: Amazon SES - Configure Bounces & Complaints Notifications

Your Amazon SES service should now be fully functional with Lead Guerrilla.

9.5 Mandrill Webhook

Lead Guerrilla used to support Mandrill for SMTP service, but Mandrill was acquired by MailChimp early in 2017 and unfortunately its availability is now limited to MailChimp subscribers. Accordingly we are no longer in a position to support the Mandrill service. We recommend you use one of the other very capable options discussed in this chapter.

9.6 Mailjet Webhook

Lead Guerrilla supports Mailjet's webhooks for bounces, spam and blocked email. Before any of the configuration steps below, you'll need to create an account on Mailjet.

1. In the Lead Guerrilla ⚙ *Settings menu - Configuration - Email Settings* screen, set the *Service to send mail through* dropdown to *Mailjet.*
2. Then enter your Mailjet *Username* and *Password*, choose *Sandbox* mode or not, and *Apply* settings.
3. Login to your Mailjet account and go to *My Account - Event tracking* (triggers), in the REST API section.

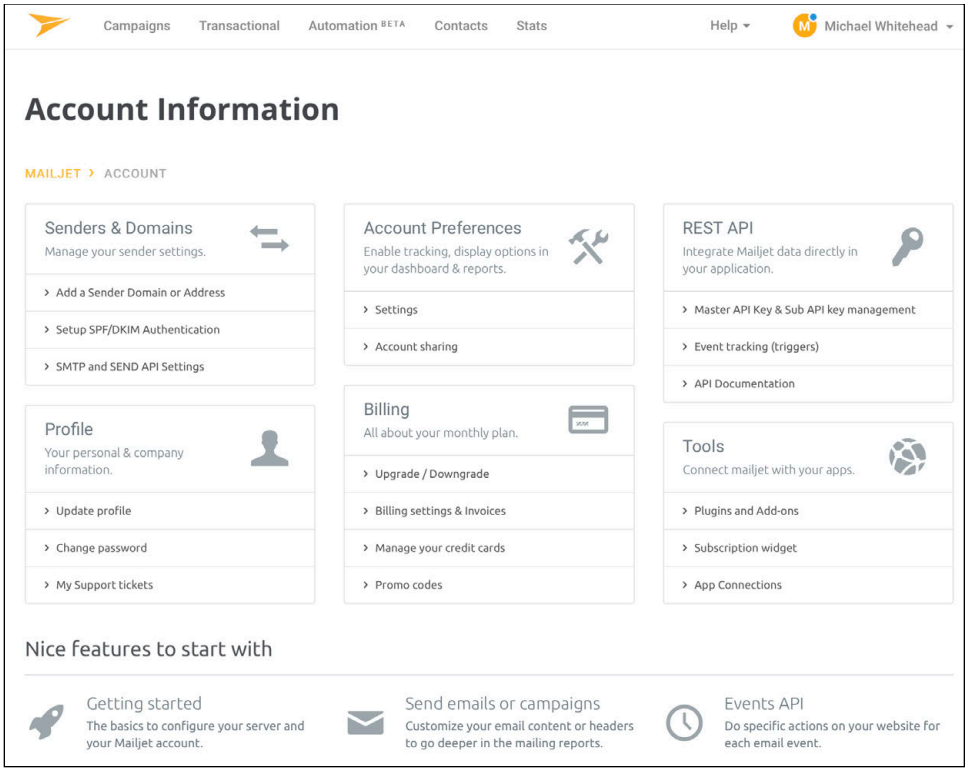

Figure 95: Mailjet - Select Event Tracking (Triggers)

4. On the event type list, select the ones you want to link to your Lead Guerrilla account as shown below. Lead Guerrilla supports the webhooks *Message is Bounced*, *Message is Blocked*, and *Message is Spam* - so typically you'll select those three.
5. Fill in the Endpoint URL fields as `http://yourLGurl.com/mailer/mailjet/callback`,

   where `http://yourLGurl.com` is the URL of your Lead Guerrilla instance.
6. Click on *Save*.

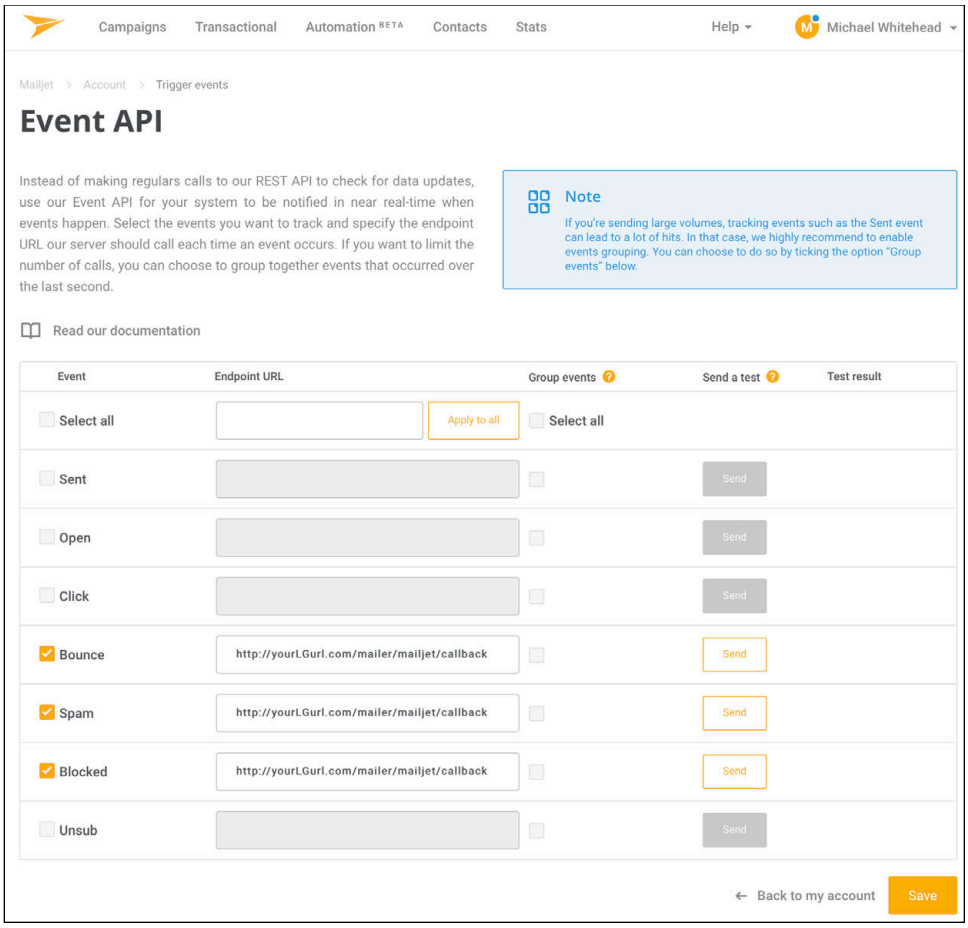

Figure 96: Mailjet - Configure the Event API

9.7 Sparkpost Webhook

Lead Guerrilla supports Sparkpost's webhooks for bounces, spam and blocked email. Before any of the configuration steps below, you'll need to create an account on Sparkpost, and generate an API key.

1. In your SparkPost account, go to *Account - API Keys*, and click on *New API Key* to create a your new API key. On the next screen set whatever name you prefer and select all permissions. Click the *Add API Key* button, then be sure copy and save the key as this will be your one and only opportunity to keep this key.

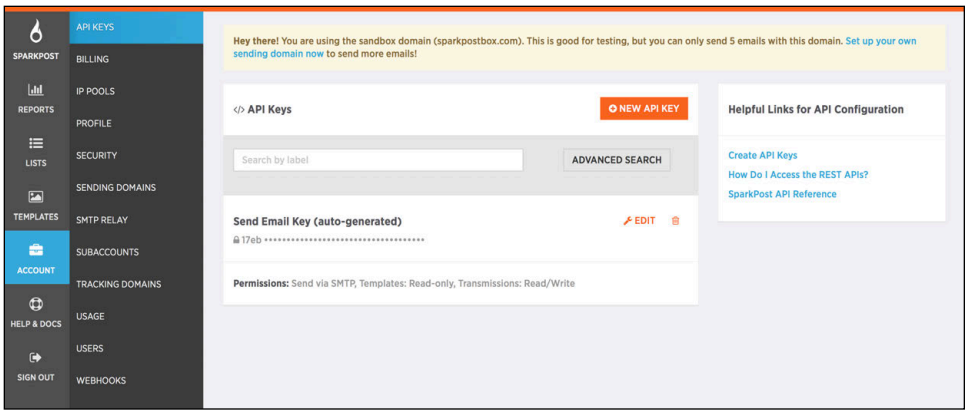

Figure 97: Sparkpost - Account, API Keys

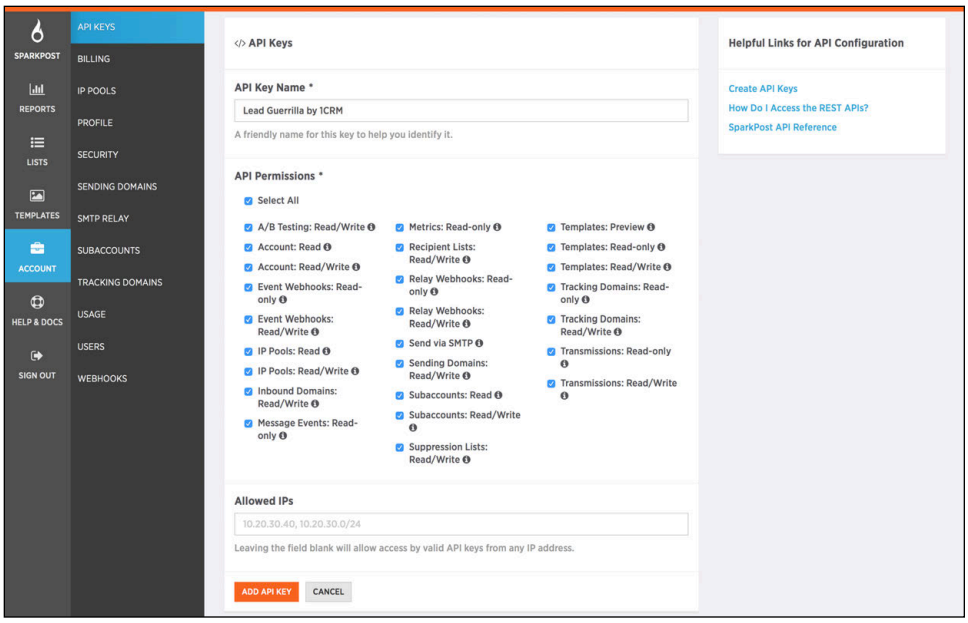

Figure 98: Sparkpost - Generate an API Key

2. In the Lead Guerrilla ⚙ *Settings menu - Configuration - Email Settings* screen, set the *Service to send mail through* dropdown to *Sparkpost.*
3. Then enter your Sparkpost *API Key* from the steps above and *Apply* settings.
4. Login to your Sparkpost account and go to Account -> Webhooks.

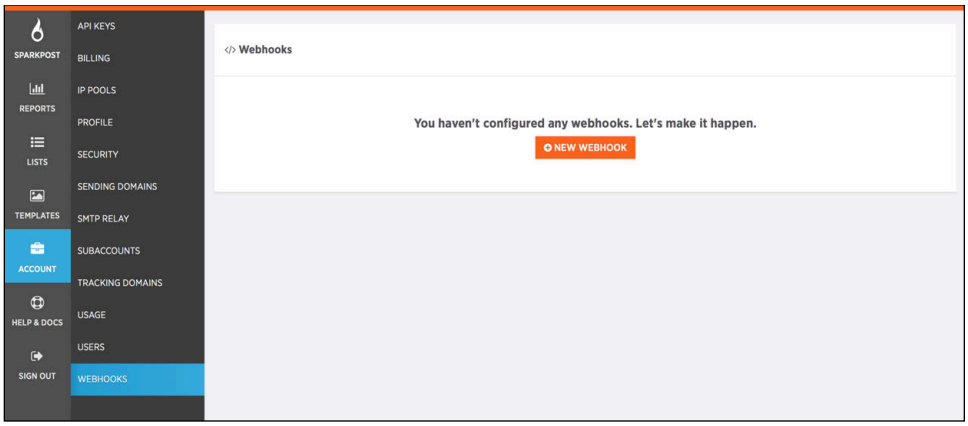

Figure 99: Sparkpost - Account, Webhooks

5. Click the *New Webhook* button.

6. Set whatever webhook name you prefer and fill in the *Target URL* as `https://yourLGurl.com/mailer/sparkpost/callback`,

   where `https://yourLGurl.com` is the secure URL for your Lead Guerrilla instance.

7. Select the Events shown below, and click on *Add Webhook*.

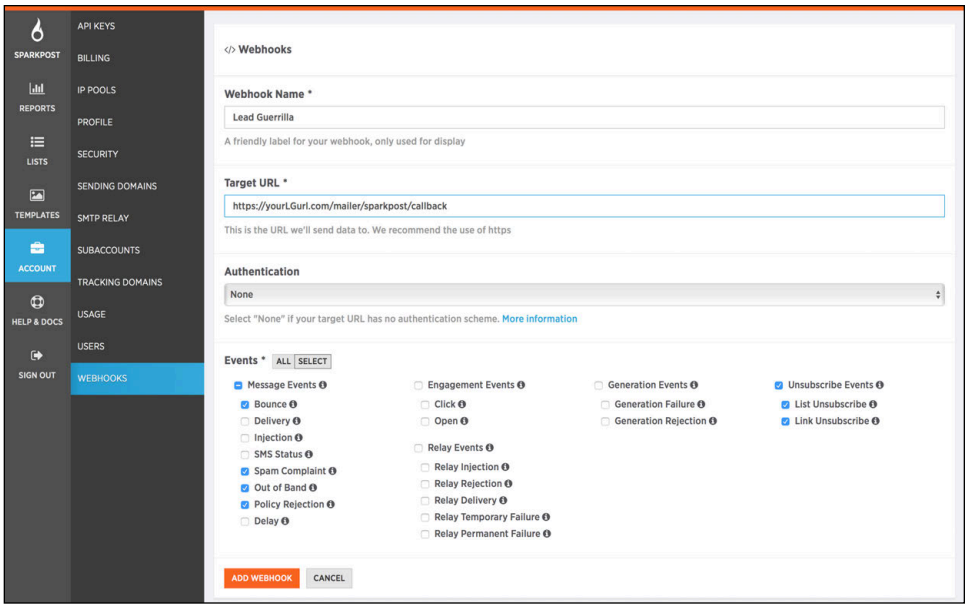

Figure 100: Sparkpost - Create a New Webhook

8. You should receive a Woohoo! Success message.

10.0 Cron Task Configuration

Lead Guerrilla requires that on its host server a few Cron tasks are defined to handle the automation of some necessary system processes. These tasks are all pre-configured on the Lead Guerrilla cloud platform at `leadguerrilla.cloud`. We're just telling you a bit about them here as even though you don't see them they will influence the behaviour of things you do see.

How frequently and at what times these Cron tasks are performed is important. It is also important they they do not all run at the same time, which might cause your Lead Guerrilla system to respond slowly to its users.

For instance, the Lead Guerrilla Cloud Cron tasks are typically run on this schedule:

`segments:update`	run at 0, 10, 20, 30, 40 and 50 minutes past the hour
`campaigns:rebuild`	run at 2, 12, 22, 32, 42 and 52 minutes past the hour
`campaigns:trigger`	run at 4, 14, 24, 34, 44 and 54 minutes past the hour
`emails:send`	run at 6, 16, 26, 36, 46 and 56 minutes past the hour
`email:fetch`	run at 28 and 58 minutes past the hour
`social:monitoring`	run at 20 and 50 minutes past the hour

10.1 Standard Cron Tasks

10.1.1 Segments

`segments:update` - *Keep the segments current*

This script processes contacts in batches of 300.

Optional Tuning:

It can be tuned to server resources using the option `--batch-limit=X` - where X is the number of contacts to process each batch.

You can also limit the number of contacts to process per script execution using `--max-contacts` to further limit resources used.

10.1.2 Campaigns

`campaigns:rebuild` - *Keep campaigns updated with applicable contacts*

This script processes contacts in batches of 300.

Optional Tuning:

It can be tuned to server resources using the option `--batch-limit=X` where X is the number of contacts to process each batch.

You can also limit the number of contacts to process per script execution using `--max-contacts` to further limit resources used.

`campaigns:trigger` - *Execute campaigns events*

This script processes events in batches of 100.

Optional Tuning:

It can be tuned to server resources using the option `--batch-limit=X` where X is the number of events to process each batch.

You can also limit the number of contacts to process per script execution using `--max-events` to further limit resources used.

`emails:send` - *Process Email Queue*

When a system is configured to queue emails, this Cron task is required to process them.

`email:fetch` - *Fetch and Process Monitored Email*

Processes the returned email notifications for Bounce Management.

`social:monitoring` - *Social Monitoring*

Performs the external Social Monitoring.

10.2 Optional Cron Tasks

`messages:send` - *Send frequency rules rescheduled marketing messages*

Messages that are marked as Marketing Messages (such as emails to be sent as part of a marketing campaign), will be inserted into a message queue IF frequency rules are setup as either systemwide or per contact. To process this queue and reschedule sending these messages, this Cron task should be added to your list of jobs:

Note: These messages will only be added to the queue if frequency rules are applied either systemwide or per contact.

`webhooks:process` - *Webhooks*

If Lead Guerrilla sends webhooks in batches, this optional Cron task will be needed to send the payloads.

`iplookup:download` - *Update MaxMind GeoLite2 IP Database*

Lead Guerrilla uses MaxMind's GeoLite2 IP database by default. The database is not packaged with Lead Guerrilla, but may be downloaded manually through Lead Guerrilla's Configuration tools. This Cron task can automatically download updates to avoid a periodic maintenance chore.

`maintenance:cleanup` - *Cleanup Old Data*

This Cron task will cleanup a Lead Guerrilla installation by purging old data. Note that not all data can be purged - only audit log entries, visitors (anonymous contacts), and visitor page hits.

Warning: This will permanently delete data! Be sure to keep database backups.

Optional Tuning:

```
maintenance:cleanup --days-old=365 –dry-run
```

Use `--dry-run` to view the number of records to be purged before making any changes.

`broadcasts:send` - *Send Scheduled Broadcasts (e.g. segment emails)*

Scheduled broadcasts for channel communications are sent by a Cron task. Currently this is for segment emails only. This Cron task may be used instead of requiring a manual send and wait with the browser window open.

Note: The emails must be published and must have a published up date - this is to help prevent any unintentional email broadcasts. Only contacts who have not already received the specific communication will have it sent to them.

Optional Tuning:

```
broadcasts:send [--id=ID] [--channel=CHANNEL]
```

LEAD GUERRILLA

LEAD GUERRILLA USER GUIDE

Your complete guide to using Lead Guerrilla