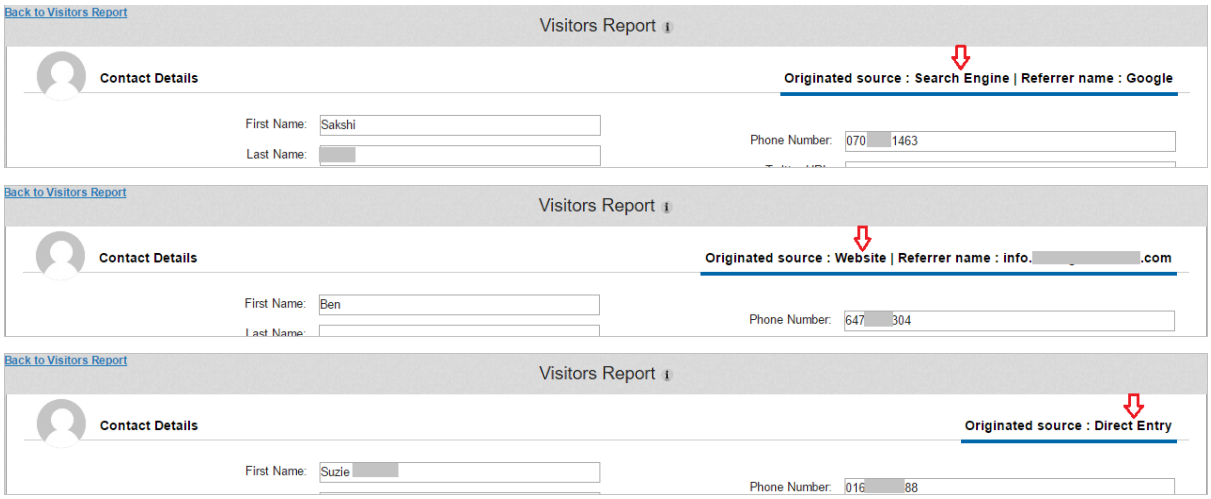
Marketing Manager New Release v7.1

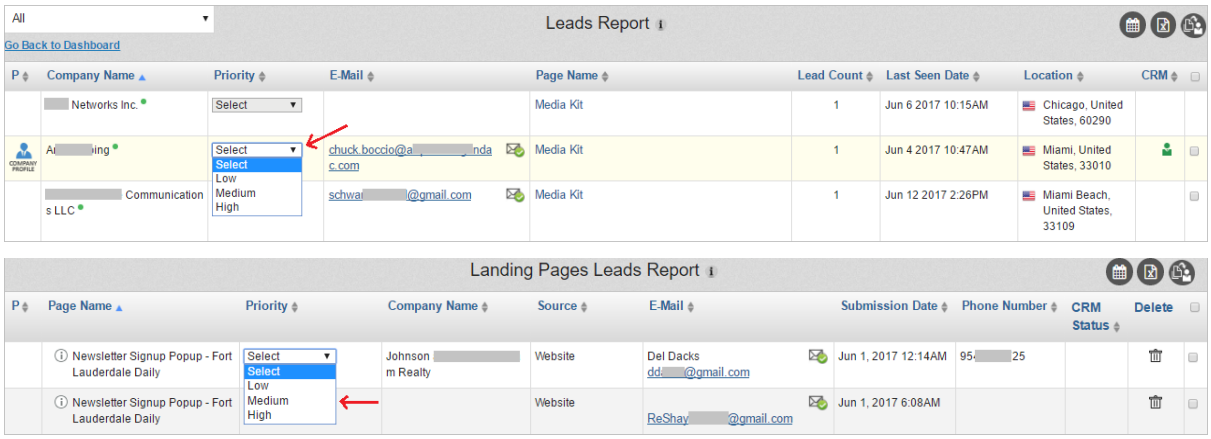
Contact Originated Source

- When you click on the Email ID of a contact, you can find the originated source ie., how and from where the visitor is captured for the first time in Marketing Manager.



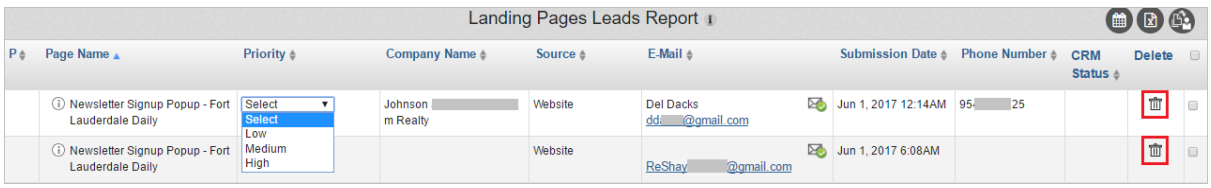
Qualify a Lead

- Now you can qualify a lead by selecting a priority in 'Leads Report' or 'Landing Page Leads Report'. A priority can be set only for the records with Email ID. If a priority is setup for a Lead in one report, same setting will be automatically applied in other report as well for the same lead.



Delete a Lead

- You can also delete the lead from 'Landing Pages Leads Report' however please note that any other lead records with the same Email ID will also be deleted though they are submitted for other landing pages.



- Below are the dependent areas that would be affected by deleting a lead:

1) **Dashboard:** There will be a change in the count of Digital IDs, Landing page E-mails captured, Visitor Pie Chart percentage.

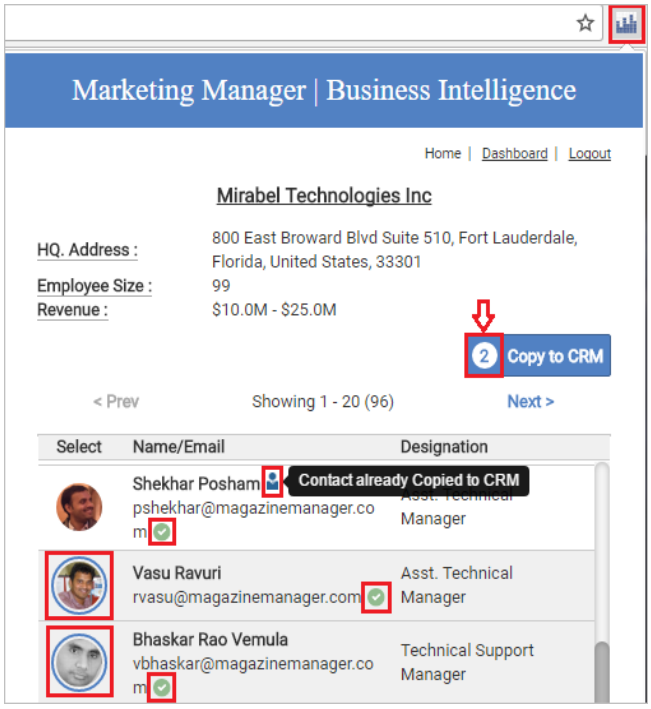
2) **Identified Visitor Charts:** Counts and percentages will change on the below reports:
    - Identified Visitor Chart.
    - New vs Returning Identified Visitor Chart.
    - New vs Cumulative Identified Visitor Chart.
3) **Landing page reports:** Lead will be removed from 'Landing Pages Leads Report', Count will be changed in Monthly Lead Reports (Source, Category, Type).
4) **Campaign Source Report:** Respective form submission records will be removed from 'Campaign Source Report'.
5) **Contact Interactions:** Respective form submissions will be removed from interactions.
6) **Lead scoring Report:** 'Lead Score' will be aggregated excluding the score of the deleted form submission lead.

Color Segmentation of CRM icon

- Color segmentation of CRM icon enables the users to distinguish between the contacts that are copied from Marketing Manager and the contacts that are created directly in the CRM using the 'Add contact' feature. The CRM icon for a contact that is copied from Marketing Manager to CRM will be in 'Blue' while the icon is colored in 'Green' if the contact is created directly in the CRM.

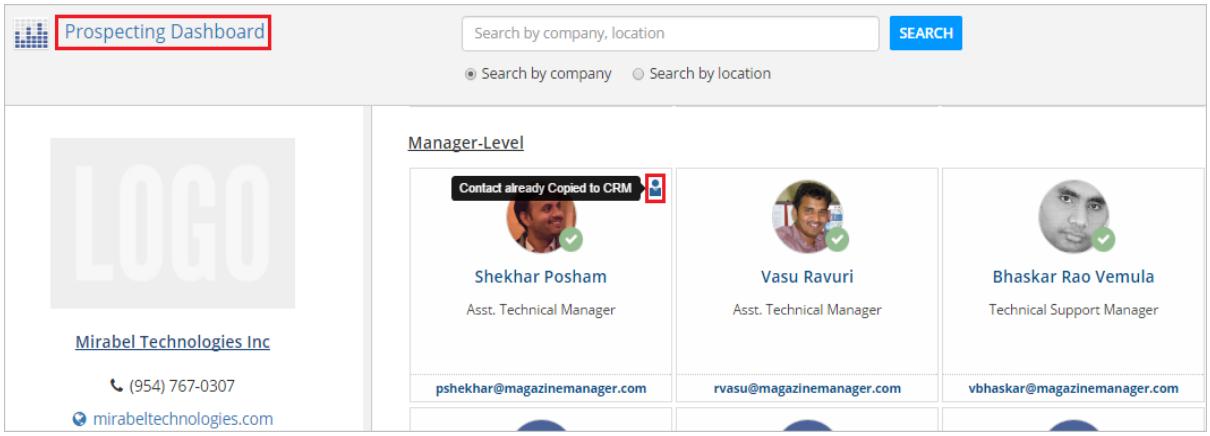
Browser Extension Enhancements

- Now you can identify the contacts that you have already copied from Browser Extension to CRM by looking at the 'CRM' icon , you cannot select/copy the contacts that you have already copied to CRM.
- Now you can see the Email ID validation status for the contacts in Browser Extension.
- You can now see the number of contacts you have selected for copying to CRM in the 'Copy to CRM' button.



Prospecting Dashboard Enhancements

- Now you can identify the contacts that you have already copied from Prospecting Dashboard to CRM by looking at the 'CRM' icon . You cannot select or copy the contacts that you have already copied to CRM.



Filter Internal IPs

Menu Path: Dashboard Menu → Setup → Website Setup → Click 'Settings' icon.

- Using this setting, you can choose to show (or) hide the leads from your internal IPs in the 'Leads Report', 'Landing Pages Leads Report' and Monthly Leads Reports.

'Visiting From' field in Visitors Report

- 'Visitor Report' shows the 'Visiting From' information for each visit.

Enhanced Search in Visitors Report

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

- Now you can seamlessly search in 'Visitors Report' based on:

Company Name Location Email