ContentMX

User's Guide

Contents

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Overview

ContentMX makes it easy to find and create content, and provides an integrated and time saving approach to distributing this content across blogs, social sites, and email newsletters.

ContentMX does it all AND it works with the marketing platform you already have including HubSpot, Exact Target, Constant Contact, MailChimp, Vertical Response, Wordpress, Blogger, Tumblr and more.

How it Works

Many marketing platforms take a template first approach. Select your template, then plug your content into it. ContentMX takes a content first approach. You focus on locating, selecting, and creating content and the template is designed to wrap around it. This makes the posting of content to blogs, social media sites, and newsletters more efficient and even automatic.

How Can Tools Help?

The streamlining and automation of tasks is critical when faced with the daunting responsibility of publishing content regularly. There are two parts of this process which can benefit the most from these optimizations:

- **Finding, selecting, and creating content.** The content problem is often the most important issue for a content marketer. How do you maintain a steady stream of interesting and engaging content? The ContentMX content dashboard makes this process easy. It brings together current and relevant content from all around the web and the subject experts in your industry and automatically puts it at your fingertips. Content can come from all sorts of places including blogs, YouTube channels, Facebook and Twitter feeds, search results, your corporate library and more. Select content manually or have it be republished automatically as it appears.

- **Populating and sending the newsletter template.** When assembling a newsletter you can spend a lot of time pointing and clicking to bring in content from many places. Each time you create a new newsletter edition, the newsletter template starts out blank and it is up to you to fill it. ContentMX makes this process of filling a template much easier and faster. The template is designed to let content flow into the appropriate sections. As you post content to your blog and your social sites, the newsletter is built right in front of you.

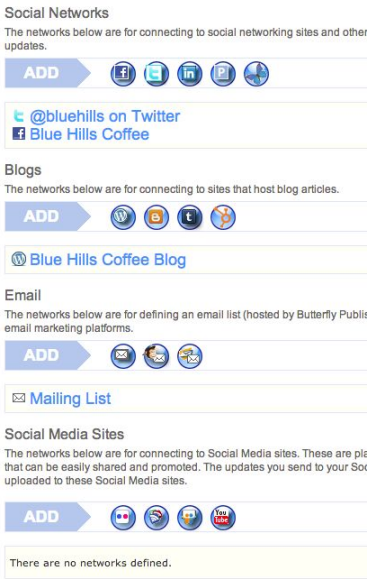
Connecting to Your Networks

The first time you use ContentMX you will be prompted to connect your account to various social networks, blog and email services. This is where you connect your account with social

networks like Facebook, Twitter, and LinkedIn.

TIP: To see and edit the networks you are already connected with, or to create a new network connection, click the button with the green plus icon.

The process of connecting your account to each service will be different depending upon the type of connection you are making. Connecting to Facebook, Twitter, and LinkedIn is fairly simple. Generally you will be asked to perform a sequence of steps which includes logging into your account on that service and granting permissions. Just follow the prompts.



For example, your connection to Facebook can either be to your Facebook Page or to a Facebook Group that you manage. You will see both options available to you when you begin the connection process.

To return to the Networks page and edit any of your connections, you can click the Settings tab on the upper right at any time. Then click the Manage Networks option under the Networks and Sources menu on the left side of the page.

NOTE: When you connect to a Facebook page, you will need to connect through a personal Facebook profile that has the rights to administer that page. Connecting through a personal profile is required because Facebook does not provide any other way to manage pages. So do not be concerned about using your personal profile. Once the connection is made, content will only be posted to the specified page and not to your profile.

Blogs

In addition to social networks like Facebook and LinkedIn, you can also maintain one or more blogs. This is a good idea when you have your own original content. Search engines like Google will use the content of your blog in their index. We can make network connections to the following blog software/services:

- Wordpress
- Blogger
- Tumblr
- HubSpot

Email Networks

In addition to making connections to your social networks, you can connect to Email Networks. An Email Network can be an email list that you import and maintain in ContentMX or it can be a

mailing list hosted in another email marketing platform.

You can make network connections to mailing lists in platforms such as:

- Constant Contact
- Oracle Eloqua
- Exact Target
- iContact
- MailChimp
- Marketo
- Vertical Response

The method for connecting an email network differs between one email marketing platform and the next. To make the connection, follow the instructions provided.

Editing Your Profile

Your profile is where you specify your name and email address, the name of your business or organization, a banner, and other contact information. This information is used in your newsletter and as the FROM address on any email that is sent.

To modify your Profile, follow the screen prompts or click the Settings button on the upper right. This will display the Profile entry screen.

To specify a new picture for your banner you can either obtain the Web address of a picture hosted anywhere on the Web (that is freely accessible) or you can upload a picture file from your computer. Banner pictures should be in one of the common formats (.JPG, .GIF, or .PNG) and are best when they are 600 pixels wide.

Defining Content Sources

To place good content at your fingertips you establish content Sources. You can collect and organize content from many places and have all of this information appear in the panels of the Content Dashboard and in the Newsletter Editor.

A content panel starts in a collapsed format, showing just the title bar. Click on the name of the panel to expand it and display the content it contains. Click it again, and the panel will close. Place your mouse cursor on the right side of the bar to reveal icons. Click the pencil icon to edit the source, and the X icon to delete or hide it.

To choose and publish any content item in the panel, click the Select button next to the item.

To create a source, click the Add Source button on the top of the Content Dashboard or the bottom of the Newsletter Editor. This will open the source type selector.

After choosing a Source type, you will be prompted for the information needed to define the

source. For instance, to establish an RSS feed as a source, you will be asked for the source name and the RSS feed address. To define a Twitter Search, you will be asked for the source name and one or more search terms.

Source types include:

Blog/RSS Feed - This is a feed of content items that come from a blog or website. These items are formatted into a special data file format known as an RSS feed. If you know the URL of the RSS field, you can simply paste that into the URL Address field. If you do not know the RSS feed address, just type the main web address for the blog and ContentMX will attempt to detect and determine the RSS feed URL automatically.

Facebook Feed - This is the feed of items posted to a Facebook page. You can choose from the list of pages you already like, or specify any Facebook page by entering the full URL pointing to the page.

Twitter Feed – These are the Tweets that come from a particular Twitter account. Pick one of the Twitter accounts you are already following, or enter the Twitter handle for any other Twitter user.

YouTube Channel - This is a feed of videos associated with a particular YouTube channel.

Google Search – these are Google search results. You can provide keywords for various Google search types including:

- Web Search
- Image Search
- Video Search
- Blog Search
- News Search

Bing Search - these are Bing search results. You can provide keywords for various Bing search types including:

- Web
- Image
- Video
- News

Twitter Search – These are the search results from Twitter. You can specify keywords, usernames (e.g., @myname), or hash tags (e.g., #butterfly).

Content Library – this is content that comes from another ContentMX account and can

be used as a content library.

Navigate Networks

ContentMX makes it easy to monitor updates and see comments and responses from various social networks. To see the content being posted by your friends in your networks, click the Navigate Networks tab at the bottom of the home page. If you have connected to Facebook you will see the news feed from your Facebook account. If you have connected to Twitter you will see the tweets from your Twitter account. This is a convenient way to monitor each of your social network connections without having to leave ContentMX and login to the other site. ContentMX also makes it easy to comment on a posting or reply or re-tweet an update on Twitter.

Creating a New Message

When you are ready to post something to your social networks, blog or newsletter, this is easily done through the content entry area.

When you start typing, the character counter will keep track of how many characters you have entered. This is important if you are posting your message to Twitter which limits your post to 280 characters.

> **NOTE:** If you are entering content you will post to Twitter and Facebook at the same time, you may want to enter two different versions of the short message since the message length requirements are different between these two platforms. To enter a different longer message for Facebook, click the 'Add Longer Status for Facebook' button that appears on the lower right of the short message box.

By default, you will be entering a simple message with no "attached" media or content. This message contains only text and can also include web links (that begin with 'http://'). Any valid web URL that you enter will be automatically converted to a "short link" which helps you conserve the number of characters used for the link.

Attaching Links and Media to Your Message

You can also "attach" additional media or content to your message. This is done by selecting one of the content type icons above the message entry box.

The additional content types include:

Link – a link to a valid web page. The link will include a thumbnail, title, and short summary.

Video – a link to a YouTube video.

Picture – a link to a picture hosted through ContentMX, Flickr, or any other accessible web site.

Document - a document that can be opened in another program. This could be an Adobe PDF file, an Excel spreadsheet, or a Word document.

Quick Poll - Ask users to answer a multiple choice question. Once votes are collected, Quick Poll Results can be posted.

Blog Article – a longer posting that includes a title and body that will be posted to a blog.

Email - this is a message that includes a subject line and a body that will be sent as an email.

Posting a Message

Once your message is composed, you can send it to your networks. All of the available networks will be listed under the 'Publish to' prompt. Just place a check in the boxes next to all of the networks you would like to include. By default, even if no networks are selected, all content will be posted to your Butterfly Page. To see your Butterfly Page, click the Butterfly Icon on the upper right of the window. 

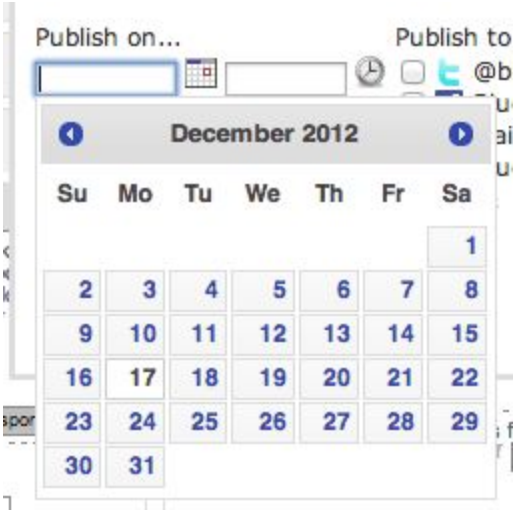
Sending An Email Message

If you choose to send an email message, only the Email Networks you have defined will be displayed.

> **NOTE:** To send a test message to a few specific email addresses, click the "Send Sample To..." link. This will open a box where you can enter email addresses separated by commas.

Scheduling an Item to be Sent Later

To send a message on a particular day and time, select a future date and time under the 'Publish on' prompt. When you click to Post this message, it will be scheduled to be published at this designated time.



Choosing a Message from a Library

ContentMX is good at working with content. Content will be available to you in several ways depending upon how your account is configured. In some cases, messages may be automatically posted on your behalf to help keep your dialog going. In other cases, there may be content waiting for you to choose within a Content Library.

If you have any content libraries available, you will find them in the Content Dashboard or in the Newsletter Editor. Click on the library name to expand it and see the messages that are available to you. If you see a message you would like to post to your own audience, click the Select button on the right. This will bring the content into the message entry box or into your newsletter. Messages from the library are sent just like any other message.

Creating a Newsletter

Creating a newsletter is easy. Click on the Newsletter tab to see the current edition of your newsletter. The first time you click this tab you may be asked to choose a template.

There are two different ways content can be added to your newsletter:

1. It is added automatically as this content is posted to social networks and blogs
2. It is added manually when you select it from a content panel in the Newsletter Editor

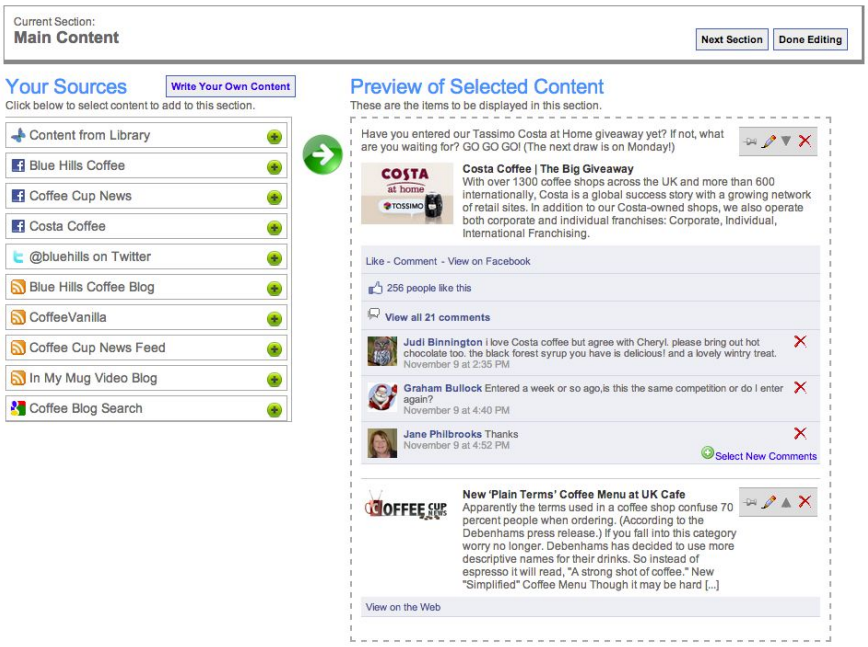
Content appears in sections of a newsletter template where “Editing Hotspots” are shown. You can see a hot spot when your cursor passes through it.

Adding Content to a Newsletter Section

To add content to a section of your newsletter, you put your cursor over an editing hotspot and

click the Add Content button.

When adding content to a particular section, the Content Selection page appears. In the left column you will see the list of Content Sources that have been defined for this section of the newsletter. Some of these sources have appeared automatically at the time connections to your social networks were made.



Click the title bar of a content source to expand its contents. Click the **SELECT** button to add it to the section. You will see a preview of the content in the current section shown on the right. If

the item you are selecting includes comments from Facebook or LinkedIn, up to the first three of the most recent comments will be displayed. To remove a particular comment, click the X icon next to it. To add other comments not currently shown, click the **Select New Comments** button.

Working with Multiple Content Sections

If your newsletter has more than one location to place content it will have multiple content sections. The Content Selection page lets you go from one section to the next without returning to the newsletter display. Click the **Next Section** or **Previous Section** buttons to go between sections. For example, your newsletter may have a Main content section and a Side Bar section.

Adding New Content Panels

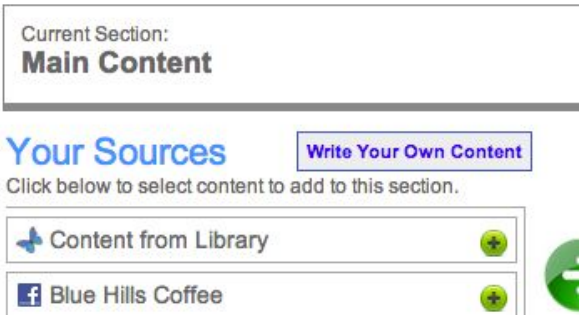
New content sources can be easily added to the newsletter editor in the same way they are added to the Content Dashboard. In some cases, the content sources will simply appear on the Content Selection page. In other cases, you will need to add the content sources manually.

To manually add a new content source, click the Add Source button:

You will then be prompted to define the source. For more on defining sources, see "Defining Content Sources" above.

Adding Content of Your Own

At the top of the Content Selection page is a button labeled "Write Your Own Content". Click this button to add new content of your own. A pop-up window will then appear which lets you edit or enter a new item and its other properties.



Moving and Deleting Content in a Section

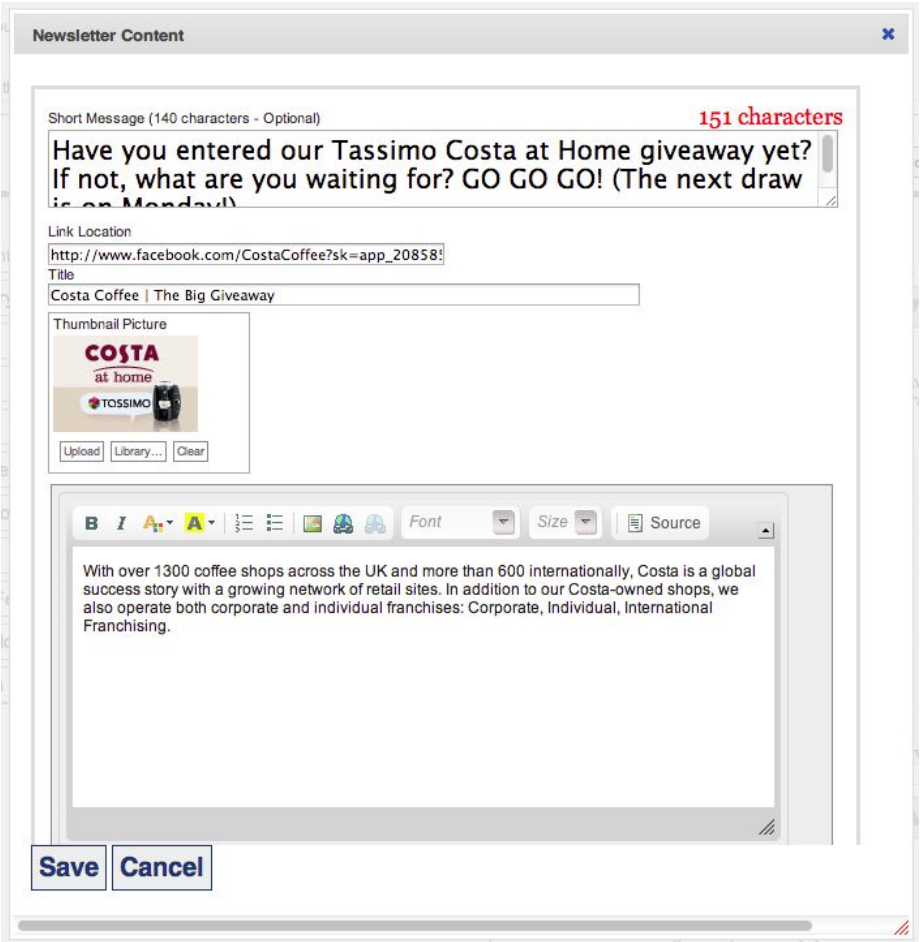
Once content has been added to a section, you can manipulate it using one of the content controls. To see the content controls, place your cursor over the item. These controls are accessible on the Content Selection page and are also available when previewing the newsletter.

To change the order of items in the section, use the up and down icons. Click to shift the item up or down in relation to the other items around it.

To remove an item from the section, click the X icon. Note that the content is removed from the section, but it is not removed from your account.

Modifying a Content Item

To modify the content of any item appearing in the newsletter, put your cursor over the item and the editing controls will appear. Click the pencil icon next to the item to edit it. The content of that item will appear in a pop-up window where you can modify it.



When you have finished adding content, click the **Done Editing** button.

Keeping the Same Content from One Edition to the Next

Sometimes you may want content in your newsletter to be the same from one edition to the next. This is easily done using the Content Pinning feature.

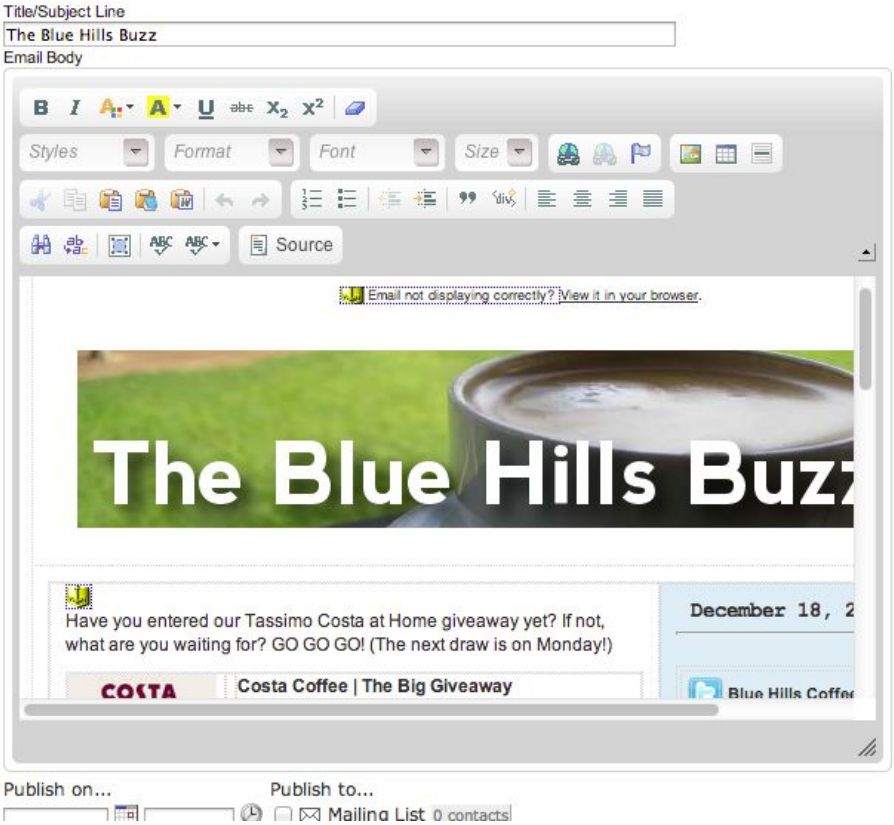
To pin content to the newsletter, put your cursor over the item (on the Content Selection page or in the newsletter preview) to display the editing controls. Then click the Pin icon.

When an item is pinned to a section, it will always appear in that section, for all subsequent newsletter editions, until the item is unpinned. To unpin an item, click the Pin icon again. The pin will rotate into the "unpinned" position.

Sending Your Newsletter

Once you have added or removed content from your newsletter, it is ready to be sent. To publish and send the newsletter, click the **Send Newsletter** button.

This will display the Email Entry page. On this page, you will see that the newsletter has been assembled automatically.



Next, enter a subject line for this email message. You will see a suggested subject line which matches the title of the top most article in the newsletter. You can modify this subject line as

needed. Remember to keep your subject line relatively short and enticing for people to read.

When you are ready, select the mailing lists to which you want the newsletter sent, and then click the Post button.

> **NOTE:** Like any other message you also have the option for scheduling the delivery of your newsletter at a later time and date.

Managing Contacts and Mailing Lists

ContentMX keeps track of subscribers to your newsletter and new leads collected through promotions as Contact Records in an Email Network. An email network is like a social network since it is a destination for your content.

By creating several different Email Networks, you can segment these contacts into various mailing lists.

Creating an Email Network

There are various ways to create an Email Network.

One easy method is to click the green plus icon to access the Network page. On this page, scroll down to the Email Networks section

Then click the Email icon to create a new Email Network in your account. You will be asked to provide a name for this network.

You can also create an Email Network through short cuts found on the Import page and in the Contact management area.

Connecting to an Existing Email Marketing Platform

ContentMX can be used to fully host your mailing list and to send your email messages. However, if your mailing list is already hosted in an email marketing platform, you can leave it there and ContentMX will send your email using that platform instead.

To use an external marketing platform, you must first connect ContentMX to that provider as an Email Network. The list of external providers supported by your account is listed in the Email section of the Network page.

NOTE: Each Email Network you define in ContentMX is connected to one mailing list on the third party provider. If you will be mailing to different external lists, you will need to make a new Email Network connection for each list.

To make a connection to an external list, click the icon corresponding to the provider you are

using. Then, follow the instructions to complete the connection.

Importing a Mailing List

If you have an existing list of email contacts, you can easily upload the entire list for use in ContentMX. This can be a list that is extracted from a third party provider, or it can be a list you keep in your CRM system.

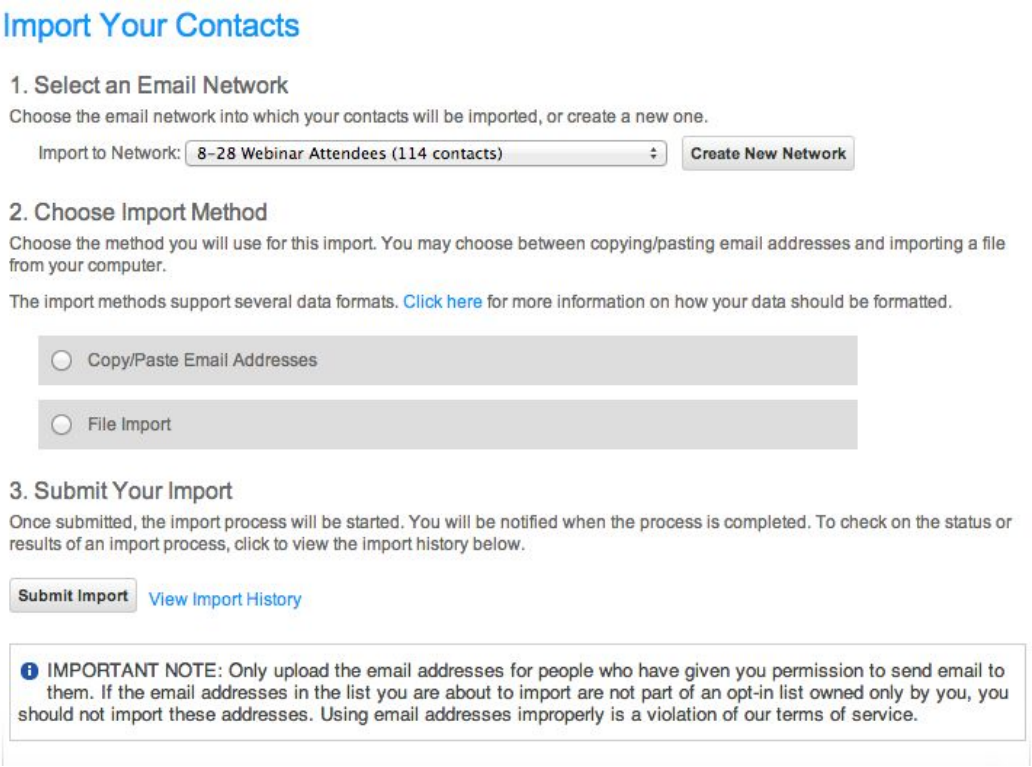
When you upload a list, any duplicate records (with the same email address) will be combined into a single record. The data fields of the last identical record in the file will be used. If a contact record already exists in ContentMX, that record will be updated with the new information from the import file.

NOTE: Contacts in the import list that have opted-out of email communications will remain opted-out. The import process preserves the opt-out status of all your contact records.

Starting the Import

To access the import feature, click the Contacts tab and then click the Import Contacts icon. This will take you to the Import Your Contacts page. From here you can import your contact information using Copy and Paste, or by uploading a data file.

In the first step, you determine in which Email Network the contacts will be placed. If this email network is not defined, click the **Create New Network** button to add a new mailing list and give it a name.



Next, pick the Import Method. You can copy and paste contact information into the import page. Or you can upload and import a data file containing this contact information.

The Import Data Format

Whether you use copy and paste or upload a file, your data must conform to one or more of the supported formats. Your import data can either be an unstructured list of email addresses or a structured data set which includes email, first and last name data fields separated with a tab, comma, or semicolon character.

Structured Import

The import process will first look at the import data to see if it is structured information that includes column labels on the first line. The column labels designate how this data will be mapped to the fields in the contact record. Here are examples of the field names the system is looking for and how it maps to the actual fields in the contact record:

- "fname" or "first" = FIRST NAME
- "lname" or "last" = LAST NAME
- "email" or "e-mail" = EMAIL ADDRESS

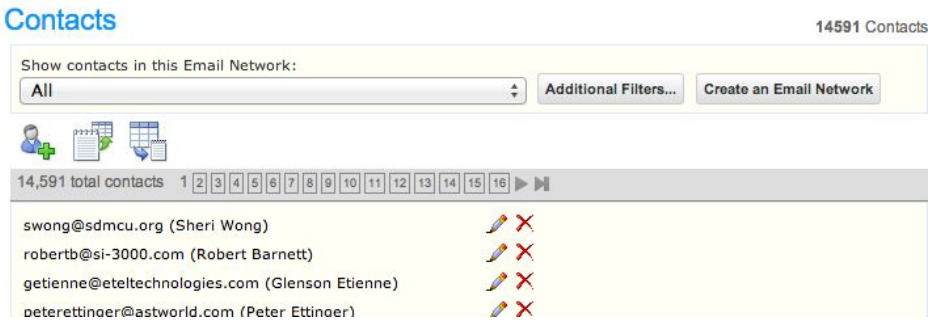
It is also possible to import up to 10 additional data fields with each record. These are called custom fields, labeled Custom #1 through Custom #10. To map one of your data columns to a

custom field, use custom_1, custom_2, … , custom_10 as the field names.

Unstructured Import
If the system is unable to identify the data as structured in this way, then it will process the data as unstructured and will simply locate and import every email address it can find in the data no matter where it appears.

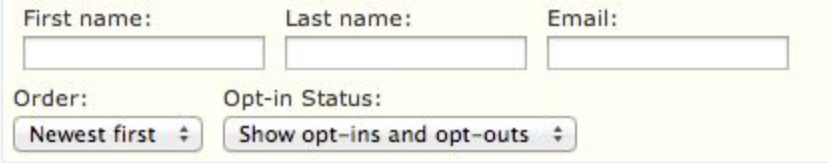
Viewing Your Lists

To view the contacts in your account, click the Contacts tab. On this screen you will see all of the contact records listed. You can then filter these records to see only the contacts in a particular Email Network (mailing list). Choose the Email Network from the drop-down list and the list will be automatically refreshed.



Finding Contacts

To find one or more contact records - by email address, first or last name, or by opt-in status - click the **Additional Filters** button. This will display input fields for specifying all or a portion of the information you are looking for. For example, enter 'Pete' in the first name field to find anyone with a first name of 'Pete' or 'Peter'. Enter 'mycompany.com' in the email field to find any contact with an email address from the mycompany.com domain.



To show only contacts that are opted in or only those who have opted out, select the appropriate option from the Opt-in Status field.

Once you have specified the filter criteria, click the **Select** button to see the results.

The filtered contact list can then be exported by clicking the Export icon. After clicking to

download the list, a delimited text file will be sent to your computer.

Reporting

The Reporting tab is where you can find various reports indicating how your content is being read and shared. The key reports accessible from the Reports menu (along the left side of the page) are as follows:

- Activity by Posted Item
- Activity by Links in Posts
- Activity by Day
- Network Growth
- Activity by Email
- Activity by Email Links
- Activity by Contact

Activity by Posting

This report shows activity related to each particular message that has been posted. The tracked activity includes:

- **Recipients** - The total number of people who could have potentially seen this message.
- **Clicks** - The number of people who clicked a link contained in the message.
- **Likes** - The number of people who have "liked" this message in their newsfeed.
- **Votes** - The number of people who voted on this poll.
- **Responses** - The total number of responses this message has received. This includes comments, re-tweets, and replies.
- **Comments** - The number of comments made on this message.
- **Re-Tweets** - The number of times this message has been re-tweeted by others on Twitter.
- **Re-Tweet Followers** - The total number of followers associated with the Twitter users who re-tweeted the message.
- **Replies** - The number of tweets that are replying to your original tweet.

For more detail on any posting, you can click on the highlighted numbers. This will display a detailed report showing the breakdown of recipients, clicks, and responses.

Sorting Posts

By default, this report shows the most recent posts first. However, the messages can also be sorted on any key metric to answer different types of questions such as:

- What are the most/least popular posts by clicks?
- What are the most/least liked posts?

- What are the posts with the most/least responses?
- Which posts have been re-tweeted the most?

Filtering by Network and by Tag

The Activity by Posting report also provides filtering criteria which can be used to focus reporting on specific types of content. Use the Network filter to show only items posted to a particular network.

Use the Tag filter to select and display only messages that have been assigned a particular tag.

Setting the Date Range

By default, this report will show data for messages posted within the past 30 days. You may adjust this date range to include older messages and/or messages up to a certain date. A maximum date range of 6 months may be enforced.

Exporting Data

Any selection of content that is displayed in the report can also be downloaded as an Excel spreadsheet (or a tab delimited file) for further analysis. Choose the order and filter criteria and then click the **Export** button.

Activity by Links in Posts

The Activity by Links in Posts report is similar to the Activity by Posting report in terms of the statistics displayed. However, the focus of this report is to identify the URL links contained within the posted messages and to report on the overall activity occurring on these links across all of the items in which they appear.

This report includes an additional measure which is “the number of messages”. This indicates how many posted messages contain this link (within the specified date range). To see these messages, click on the number. This will show the Activity by Posting report filtered to show only the messages containing this link.

Activity by Day

This report allows activity across postings to be viewed over time. There are many flexible ways to create this report depending upon the combination of data that is selected. One or more data sets can be selected and displayed together in a single chart.

The following data series are available to be plotted:

- **Clicks** - Total number of clicks per day
- **Page Views** (from Google Analytics) - Number of page views for the site or a particular

web page per day.

- **Visits** (from Google Analytics) - Number of unique visits to the site or a particular page per day.
- **Logins** - Number of times users have logged into this account each day.
- **Posted Items** - Number of items posted each day.
- **Sends** - Number of times items have been posted to a network each day.
- **Recipients** - Total number of people who have received messages each day.
- **Likes** - The number of likes associated with postings each day.
- **Responses** - The total number of responses (comments, re-tweets, and replies) which have occurred each day.
- **Comments** - The number of comments each day.
- **Re-tweets** - The number of messages that have been re-tweeted each day.
- **Re-tweet Followers** - The total number of followers who are the recipients of re-tweeted messages.
- **Replies** - The number of specific replies received each day.
- **Mentions** - The number of mentions each day.
- **Wall Posts** - The number of wall posts each day.
- **Votes** - The total number of votes which have been applied to polls each day.

Filtering by Network and by Tag

The Activity by Day report also provides filtering criteria which can be used to focus reporting on specific types of posts. Use the Network filter to show only items posted to a particular network.

Use the Tag filter to select and display only messages that have been assigned a particular tag.

Using the Left or Right Scale

When a data set is added to the chart, the data will be plotted according to the scale shown on the left side of the chart by default. When comparing data sets which have maximum values that are orders of magnitude greater than each other, it may be preferable to compare them using two different scales. This is done by clicking the “use right scale” checkbox when adding the data to the chart.

Setting the Date Range

By default, this report will show data for all messages posted within the past 30 days. You may adjust this date range to include activity within another time period.

Integration to Google Analytics Accounts

In addition to the activity results collected by the system, the Activity by Day report has the ability to overlay Page Views and Page Visits from one or more Google Analytics Accounts. This is useful for comparing posting activity with web traffic trends on a web site.

To include Google Page Views or Visits on the chart, you must first have a network connection to a Google Analytics account. This connection is created through the Manage Networks area accessible through the Settings tab (or by clicking the green plus icon).

When selecting Page Views or Visits, you have the option of including data for the whole site or selecting a particular tracked page from the site. A drop-down list will appear to allow you to make this selection.

Totals, Average, and Maximum Values

Below the chart you will find a section where the total number, average per day, and maximum values for each selected data set are shown. You can also expand this area to see all of the raw data used in the chart by clicking the VIEW DATA button.

Network Growth Report

The Network Growth report makes it easy to see how your content marketing efforts are affecting the number of friends, fans, and followers you have. This is done by plotting the number of recipients (friends/followers/contacts) that have been receiving your content over time. You can see this information on a weekly or monthly basis over the time period that you specify. By default you will see the past month of activity.

You can plot the recipients for one or more networks at the same time on the chart. Just select the network from the drop-down list and click the **Apply** button. To add additional networks, repeat the same process. You can easily remove a network from the chart by clicking the X icon next to the network name in the header of the report.

Specify Weekly or Monthly

By default, this report will show data grouped by week. This means you will see information about the largest number of followers and fans that was measured during each week across the specified date range. To change the data grouping to monthly, change the Group By setting. This will allow you to plot network changes by month.

This report will plot the number of recipients that have been measured in each network over the given time interval. Since the data is being summarized over a given time period, the system will pick the largest number of recipients measured within that period. For example, this could be the largest number of Facebook fans within the month, or the largest number of Twitter followers seen during a week.

Setting the Date Range

By default, this report will show data for all networks posted within the past month. You may adjust this date range to include activity within another time period.

Activity by Email Report

This report shows activity related to each particular email message that has been sent. The tracked activity includes:

- **Recipients** - The total number of people to which the message was sent. If you send to more than one list, this would be the aggregate number of contacts across all of the lists.
- **Delivered** - This is the unique number of emails that were delivered to valid addresses. This number is often less than the number of recipients for a number of reasons. For instance, no delivery attempt will be made on an email address that has previously bounced. Over time the system will remember the undeliverable addresses and the difference between Recipients and Delivered will grow.
- **Opened** - This is the total number of times the email message has been opened. This statistic only works for recipients who have allowed images to be displayed or have added your FROM address to their contact list. It is best to look at this value as a trend across multiple mailings.
- **Clicked** - This is the total number of times any link within the email message has been clicked.
- **Bounced** - This is the unique number of emails that have bounced back because they were undeliverable.
- **Spam Reports** - This is the number of spam reports generated by the message. Spam reports are not common, but when they occur you must take them seriously.

Drill-Down to See Report Details

On specific data points you can drill-down into the data to see more detailed information. There are two types of drill-down icons: Content Detail and Contact Detail.

Click this **Contact Detail** icon to see the list of contacts behind the data point displayed in the Activity by Contact report. From this report you can manipulate this list or download it as a file to your computer.

Click this **Content Detail** icon to see a breakdown of the URLs that have been clicked to produce the data point. These URLs are listed in the Activity by Email Links report.

Sorting Emails

By default, this report shows the most recent mailings first. However, the mailings can also be sorted on any key metric to answer different types of questions such as:

- What are the most/least popular mailings by clicks?
- What are the most/least popular mailings by opens?
- What are the mailings with the most/least bounces?

Filtering by Network and by Tag

The Activity by Email report also provides filtering criteria which can be used to focus reporting on specific types of content. Use the Network filter to show only items posted to a particular email network.

Use the Tag filter to select and display only messages that have been assigned a particular tag.

Setting the Date Range

By default, this report will show data for mailings sent within the past 30 days. You may adjust this date range to include older mailings and/or mailings up to a certain date. A maximum date range of 6 months may be enforced.

Exporting Data

Any selection of content that is displayed in the report can also be downloaded as an Excel spreadsheet (or a tab delimited file) for further analysis. Choose the order and filter criteria and then click the **Export** button.

Activity by Email Links

The purpose of the Activity by Email Links report is to identify the URLs of links contained within your email messages and to report on the overall activity occurring on these links across all of the email messages in which they appear.

Click the **Contact Detail** icon next to any particular link to see the list of contacts who have clicked on that link. These contacts are displayed in the Activity by Contact Report. From this report you can manipulate this list or download it as a file to your computer.

Activity by Contact Report

The Activity by Contact report is used to manipulate, display and download lists of contacts that are associated with various activities.

NOTE: Only activity that can be traced to a particular contact record will appear in this report. Generally this is activity related to sending email and running promotions.

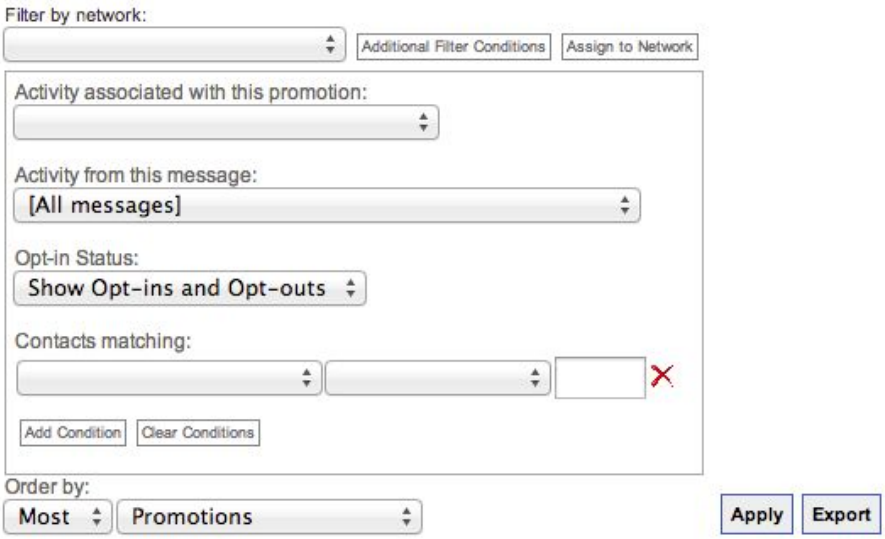
The following information is displayed for each contact record:

- **Email Address**
- **First and Last Name**
- **Promotions** - This is the number of promotions in which this contact has participated.
- **Shares** - This is the number of times the contact has shared a promotion with friends.

- **Share Referrals** - This is the number of times a promotion has been shared by friends of this contact.
- **Likes** - This is the number of times the contact has liked a promotion.
- **Completed** - This is the number of promotions completed by the contact.
- **Contacts Collected** - This is the number of new contact records added due to the referrals made by this contact.
- **Potential Followers** - This is the sum of all friends and followers associated with this contact. If this contact were to share a promotion to all of their friends, this is the number of people who could potentially see what they share.
- **Followers when Sharing** - When this contact shared the promotion, this is the number of people who have potentially seen what they shared.
- **Followers when Liked** - When this contact 'liked' the promotion, this is the number of people who have potentially seen that they 'liked' it.
- **Emails Delivered** - This is the number of times an email was delivered to this contact.
- **Emails Opened** - This is the number of times it was detected that this contact opened an email.
- **Emails Clicked** - This is the number of times this contact has clicked on a link in the message.
- **Emails Bounced** - This is the number of messages that have bounced trying to reach this contact. Generally only one bounce will be recorded because the system will automatically suppress future delivery attempts on bounced email addresses.
- **Email Spam Reports** - Span reports made by this contact.

Filtering by Activity

To see all of the filtering options, click the **Additional Filter Conditions** button.



You can filter contact activity in one or more of the following ways:

- **By Network** - Lets you isolate activity for a particular email network.
- **By Promotion** - Lets you isolate activity associated with a particular promotion.
- **By Message** - Lets you isolate activity associated with a particular content item.
- **By Opt-in Status** - Lets you filter the list to show only contacts that are opted-in, opted-out, or both.
- **Contacts Matching** (Greater Than, Less Than, Equal) - Lets you select contacts with activities that compare exactly or are above or below a specific range. For instance, you can filter to see contacts who have clicked greater than 2 times.

By applying Contact Matching filters to the contact activity reports, you can obtain lists of contacts that meet certain criteria and perform tasks such as:

- Find contacts who have participated in more (or less) than X promotions.
- Find contacts who have shared promotions more (or less) than X times.
- Find contacts who had more (or less) than X friends share the promotion.
- Find contacts that have completed more (or less) than X promotions.
- Find contacts where the number of new contact records added due to the referrals made by this contact is greater (or less) than X.
- Find contacts where the sum of all friends and followers associated with this contact is greater (or less) than X.
- Find contacts to whom at least X messages were delivered.
- Find contacts that opened more (or less) than X messages.
- Find contacts that clicked more (or less) than X times.

NOTE: You can select contacts on up to three Contact Matching filters at the same time. To include additional criteria, click the **Add Condition** button. This will add a new condition line. For each additional condition, choose the AND or OR operator to determine how the criteria will be used together. For example, you can select contacts that have participated in more than one promotion and have clicked on at least one email message.

Sorting Contacts

The contacts in this report can also be sorted to answer different types of questions such as:

- Who are the most active contacts by clicks?
- Which contacts have shared the most promotions?
- Who are the most influential contacts (with the most Potential Followers)?
- Which contacts have opened the most email?

To set the sorting order, choose a sort direction (Most or Least) and choose the type of activity under the ‘Order by’ section.

Setting the Date Range

By default, this report will show data for activity collected within the past 30 days. You may adjust this date range to include older data and/or data up to a certain date. A maximum date range of 6 months may be enforced.

Exporting Data

Any selection of contacts that are displayed in the report can also be downloaded as an Excel spreadsheet (or a tab delimited file) for further analysis. Choose the order and filter criteria and then click the **Export** button.

Assigning Selected Contacts to a Network

Once you have selected contact records, these contacts can be automatically assigned to a particular email network. This lets you easily create a segmented list of contacts based on their past activity.

To assign selected contacts to an email network, click the **Assign to Network** button. This will display a drop-down list of email networks. Select the network to which the contacts should be assigned, then click the **Assign** button.