Internet Communicator
User Guide

November 19, 2009
Created By: CRM Systems

Table of Contents

Overview

Internet communicator works to give your company a means for effectively contacting your clients and the ability to monitor the effectiveness of these efforts.

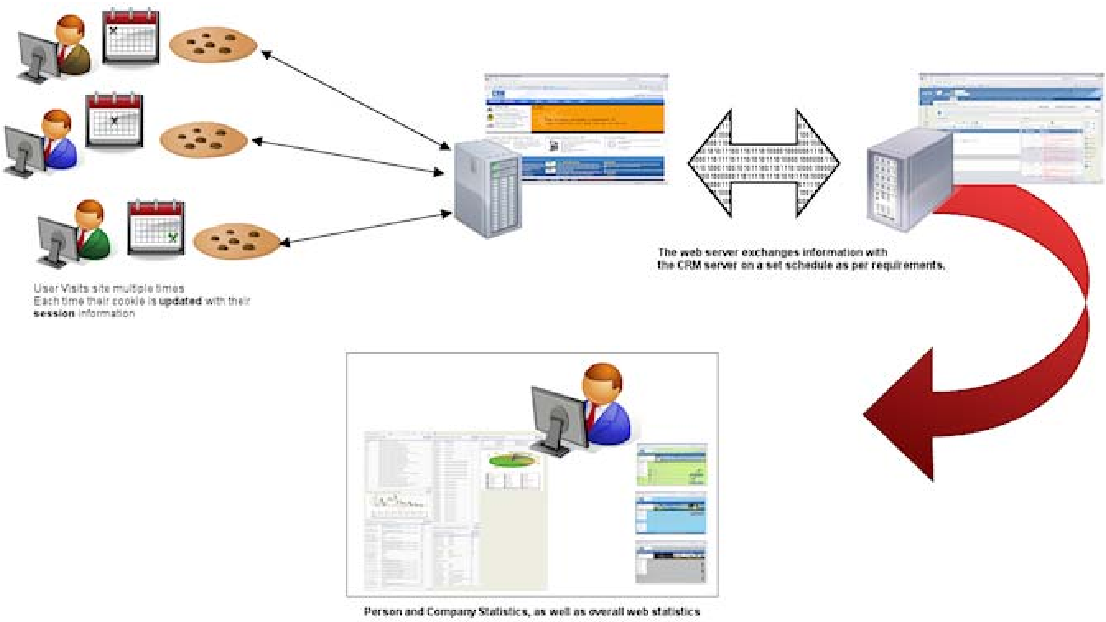
This software works to provide you with a communication system which greatly improves your ability to communicate and market through CRM. You can send bulk mails and be able to track their read rates. You can create and send powerful surveys which allow you to get instant updates on matters of interest to you and your clients.

Our system integrates with your website to allow you to have a better idea of who is visiting your website, why they came, what they're looking at and how often they come back.

The complete effect of this software is to greatly assist in making sure you have the best communication possible with your clients and data to back up your efforts in this endeavor.

This document will detail the web tracking and statistics, bulk mail, survey and powerful opt out components of Internet Communicator.

Web Statistics



The web statistics are generated by tracking the user's session id. When the user visits the website, they are given a "cookie" by the web server. Subsequent visits to the website update this cookie and add new session information.

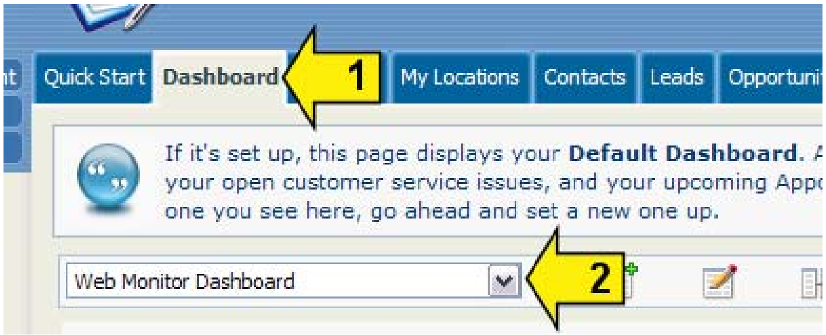
This information is continually transferred to the CRM system. When the person identifies themselves on the website by filling out, for example a contact form, then this information is regressed back to their other visits as tracked by their present and past session.

This allows the system to mark the person's past visits where they were only attached by the session id in their cookie. In the end, this enables the system to track recurring users and for the CRM user to see which parts of the website have been most heavily frequented and by whom, if possible.

Web Traffic Data

A special mention must be made that the web traffic information is transferred and stored to the CRM database. This allows for an infinite number of customized, on demand reports that can be created in CRM report viewer.

Web Dashboard

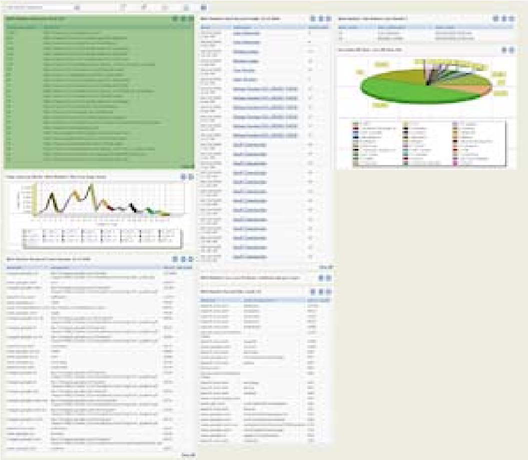


To access the web dashboard, click on My CRM and access your dashboards (arrow 1 above). Select “Web Monitor Dashboard” from your dashboard choices (arrow 2 above).

The web monitor dashboard (shown in it’s entirety below) has a number of sections, and is built within CRM so more reporting options can be added.

The web dashboard contains a general spectrum of information on the website, with visuals for daily web traffic and Geolocation information. The following items will detail each section on the screen.

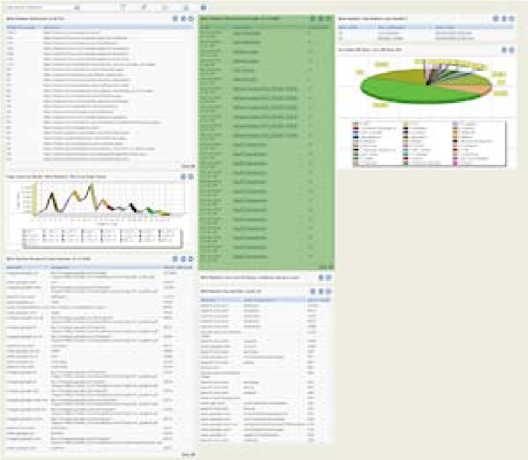
Web Monitor Referrers



Details the top referrers your website is receiving ordered by “referrers count” which is the number of times that referrer URL has sent a link to your website. You can click on “view all” at the bottom of this section to view all of the referrers.

The green overlay identifies where this section can be found (left)

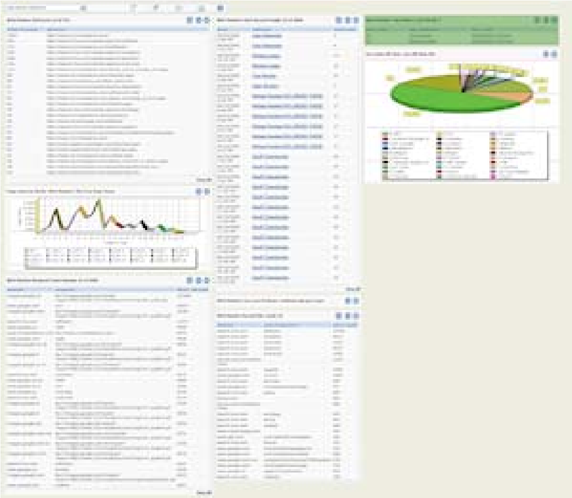
Web Monitor: Most Recent People



This lists the most recently identified people to have visited the website.

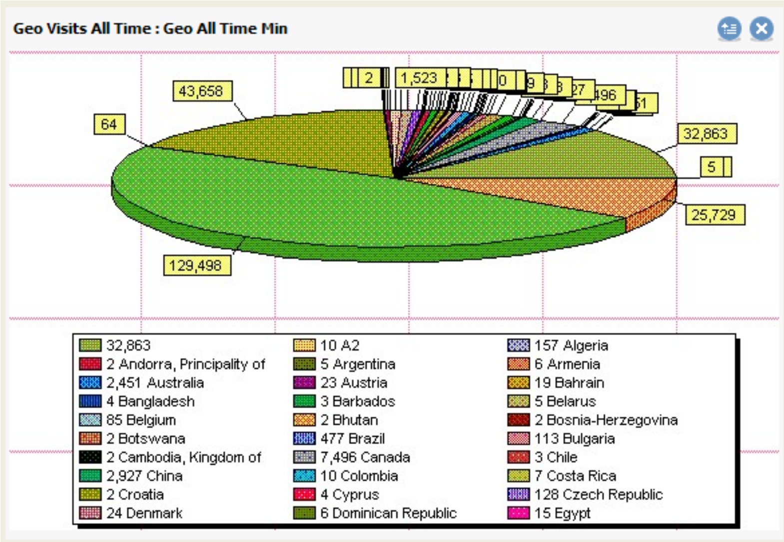
The green overlay identifies where this section can be found (left)

Web Monitor top visitors last month



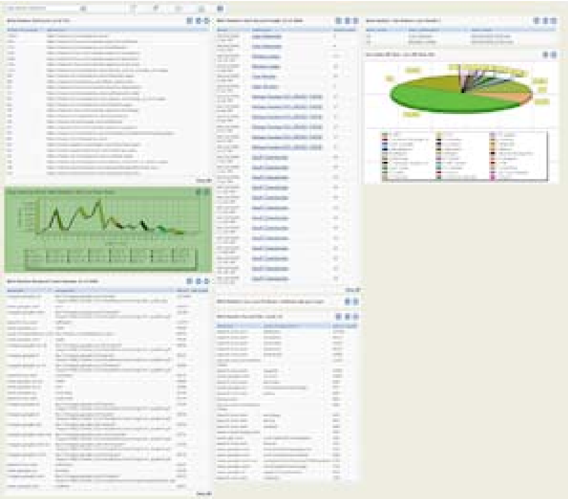
This shows the top identified visitors for the past month. Use this to see how specific marketing efforts are working.

Geo Visits All Time



This allows you to quickly see the geographical origin of visitors to your website.

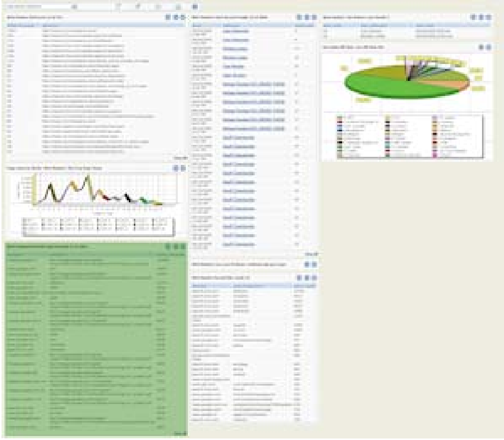
Page Views by Week: Web Monitor: this Year Page Views



This graph shows the page views to your website over the past year detailed on a week by week basis.

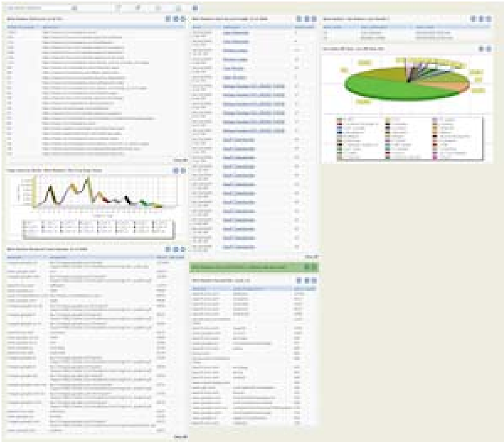
Use this to spot traffic trends early.

Web Monitor Keyword Count Domain



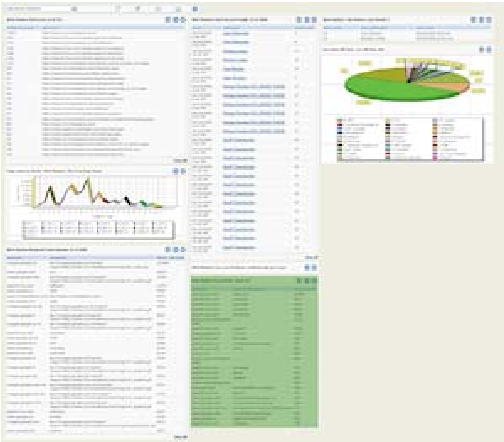
This shows the most popular keywords used to find your site in the search engines.

Web Monitor: Geo Last 24 hours



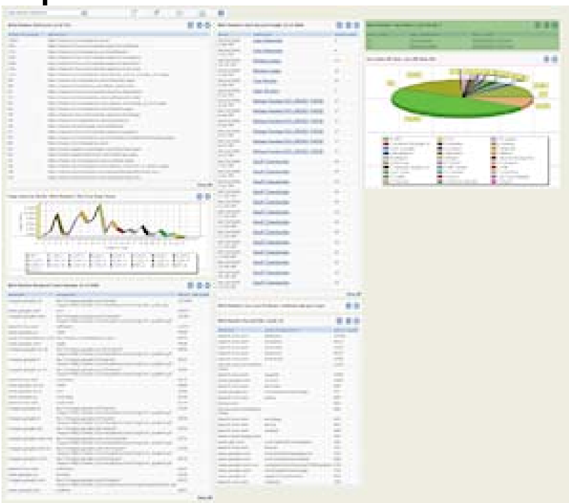
Shows the geolocation traffic over the past 24 hours, or from which countries your visitors are coming from.

Web Monitor Parsed URL Count



This shows the most popular words and phrases used in search engines to find your website.

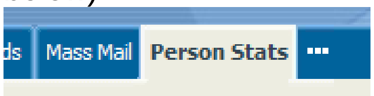
Top Visitors last month



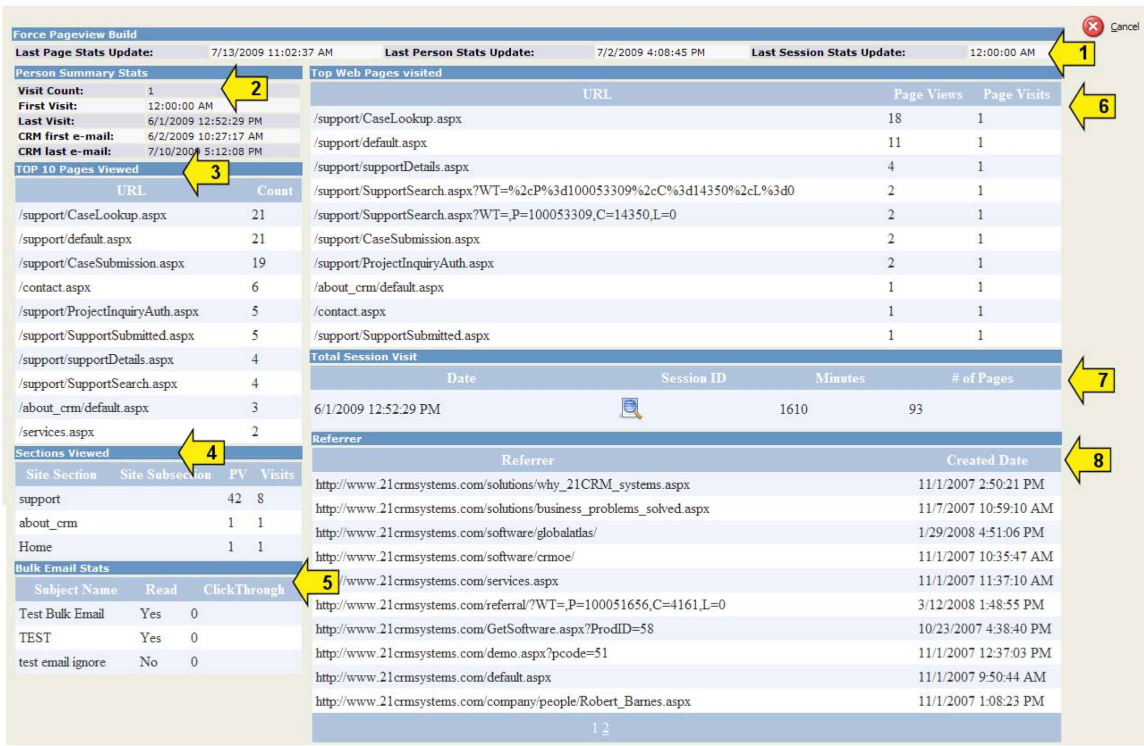
This shows the top identified visitors to your website for the previous month.

Person Web Stats

This feature, is found in the person context by clicking on the Person tab (as below)



The screen shows 8 main sections detailing the traffic for that person as identified by the system.



Force Pageviews Build (arrow 1 above)

This shows the last time the information was compiled. This is done on a regular basis as scheduled by your web server. This shows the last time the person information and session statistics were refreshed as well.

Person Summary Stats (arrow 2 above)

This shows the summary stats for the person: how many visits they have made, when they first visited the site, their last visit and when the last e-mails from the CRM system were sent.

Top 10 Pages Viewed (arrow 3 above)

This lists the top 10 pages viewed by that person from their past visits to the website and how many times they have viewed those pages.

Sections Viewed (arrow 4 above)
This information shows which section they have visited the most, and how many overall page views were made during those visit periods.

Bulk Email Stats
In conjunction with our bulk mail software (to be detailed below) this gives a quick overview of the bulk mails our system has sent out to this particular person and their response rate.

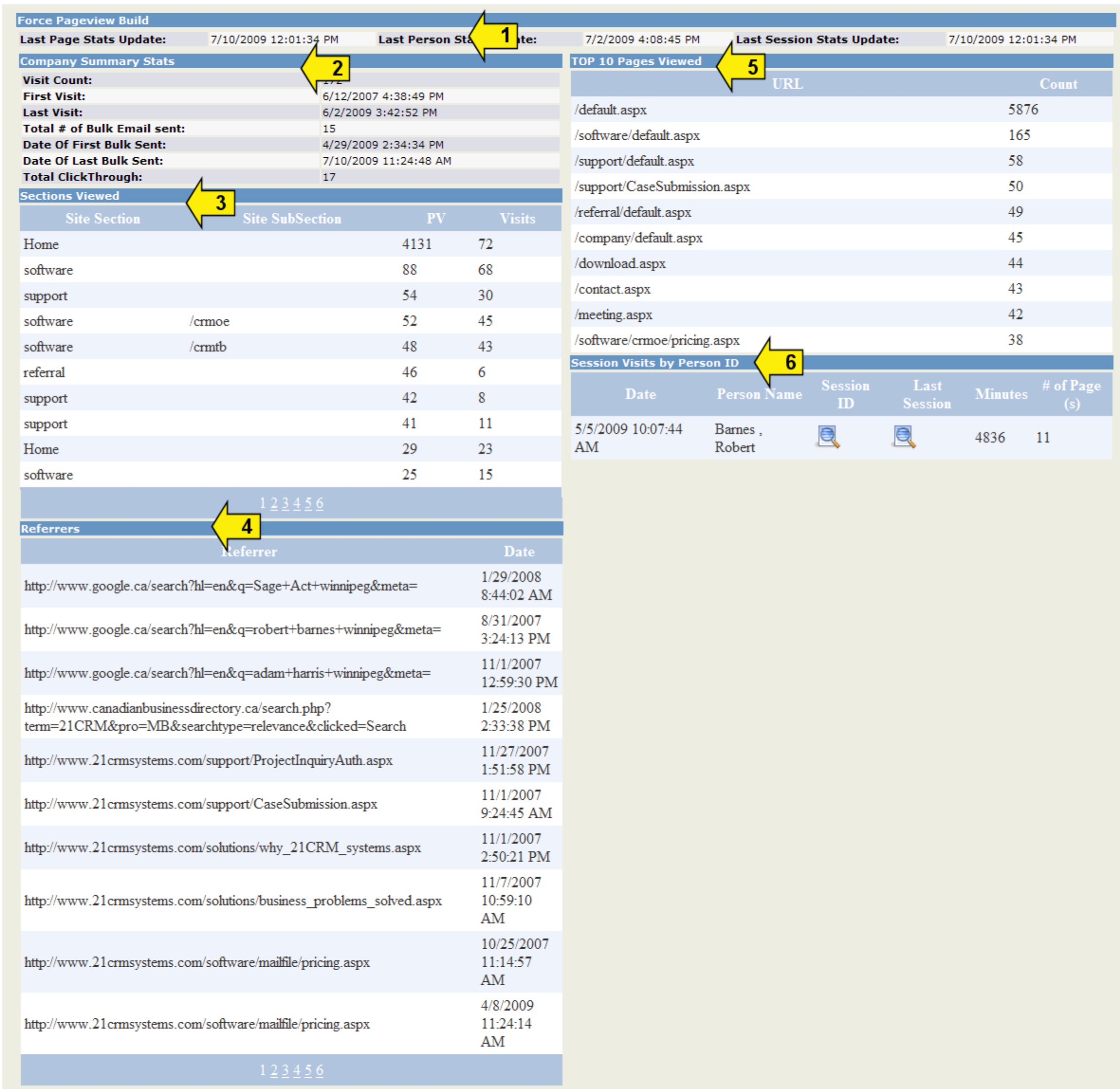
Top Web Pages visited
Tracks the top 10 pages this person has viewed on your website

Total Sessions Visit
This shows the sessions the person has had on your website and the approximate duration of the visit and number of pages viewed during each visit.

Referrer
In the person context, this shows the referring pages.

Company Web Stats

This section details the web traffic for visitors who have been identified to a particular company. This allows you to evaluate your online efforts when targeting particular companies, as well as to dig deeper into you web traffic.



Force Pageview Build
The time the system last updated the web stats. This runs on a schedule set up by the CRM admin. This can also be forced manually if necessary.

Company Summary Stats
Summary stats including the first visit from anyone in that company, the number of bulk mails sent to members of that company and their clickthrough rate.

Sections Viewed
The most popular sections viewed of your website by members of that company.

Referrers
How visitors from that company were referred to your website pages

Top 10 Pages Viewed
The Top 10 pages viewed by visitors from that company.

Session Visits by Person ID
Session visits by identified people from that company

Internet Communicator Main Menu

On the left side menu is an icon named “Int Comm”. This will take you to the Main Menu which will list items which you are responsible for. People are given responsibility over certain areas in the CRM Admin.

This area will allow you to set up events, send surveys, bulk email, etc. depending on your responsibility profile in CRM. Please read below to learn more about the functions listed in the Main menu.

Association Manager Menu

Menu Selection	Description
Surveys	Manage / Send Surveys
Survey Stats	Survey Statistics
Questions	Manage Survey/Questionnaire Questions
Questionnaires	Manage Questionnaires
Bulk Email	Send Bulk Email
Bulk Email Stats	Bulk Email Statistics
opoCode	Operation Code and SQL
Ignore List	View and modify Ignore List for page audit process in Web Tracking

Which items users are able to use are set up in the CRM User’s admin area

Can Send Bulk Mail:	Can Manage Surveys:	Can View Survey Results:	View OpoCode:	View Ignore List:
☑	☐	☐	☑	☑

Visit this area in CRM and check on the appropriate permissions (above).

Survey Setup and Use

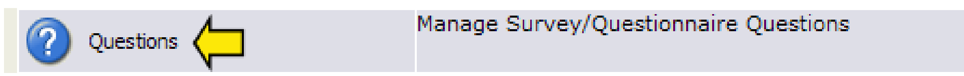
Manage / Send Surveys (Create a Survey)

***Important:* A survey is created by adding questions to a questionnaire and then choosing that questionnaire and sending that out as a specific survey.**
The steps are as follows:

1. ***Create questions***
2. ***Add questions to a questionnaire***
3. ***Send survey with the chosen questionnaire***

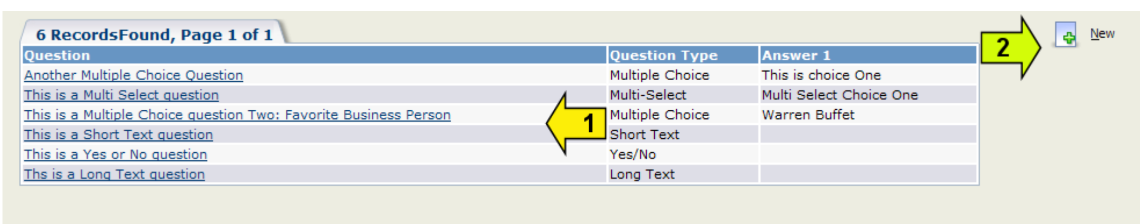
Create Questions

On the left side CRM menu is an icon named Int Comm which will list items which you are responsible for in internet communicator.



When you click on this, please choose "Questions" (yellow arrow #1 above) from the internet communicator menu.

After clicking on questions, this will present a list of questions you can modify

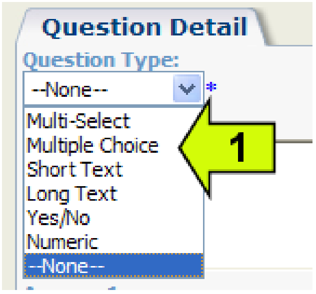


Question	Question Type	Answer 1
Another Multiple Choice Question	Multiple Choice	This is choice One
This is a Multi Select question	Multi-Select	Multi Select Choice One
This is a Multiple Choice question Two: Favorite Business Person	Multiple Choice	Warren Buffet
This is a Short Text question	Short Text	
This is a Yes or No question	Yes/No	
Ths is a Long Text question	Long Text	

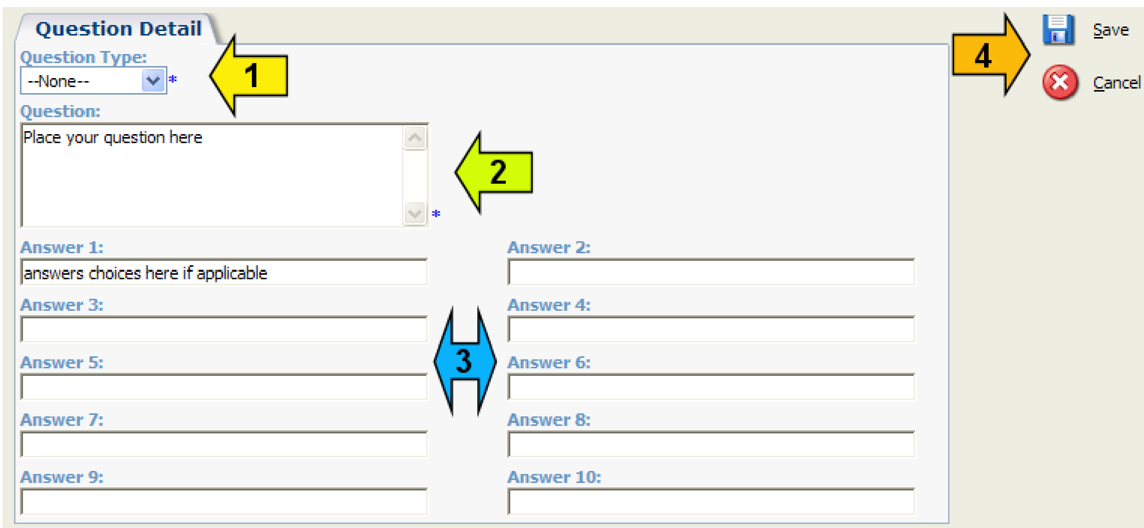
You will be presented with a list of questions (yellow arrow 1). You can click on these to modify a question. In the table you will see the Question title, the question type and the first answer. To create a new question, click on "New" (green arrow 2).

Here is how you create a new question.

After choosing new question, first choose a question type from the drop down (image below). This will list the types of questions you can create: Multi-select, multiple choice, short text, long text, yes/no, numeric.



Multiple choice – allows the user to choose one of multiple answers
Multiple Select – allows the user to choose multiple answers
Yes/No Question – yes or no answer
Short Answer – short text answer
Long Answer - long text answer
Numeric Question – A question you number.



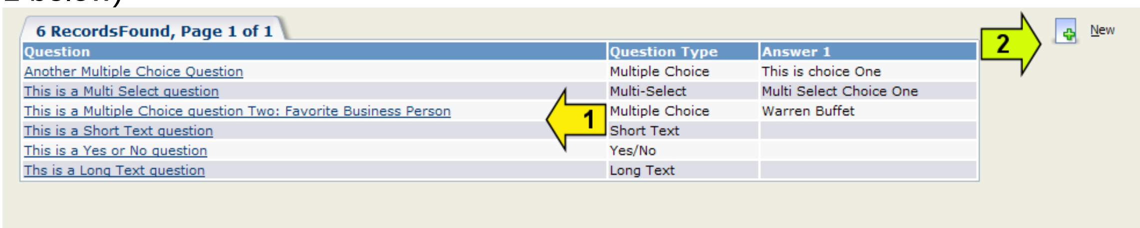
Upon choosing the question type (yellow arrow 1), the next step is to put in the question (green arrow 2). Then add the answers (arrow 3).

Yes/No, Short and Long answer questions do NOT require you to put answers in the answer fields. This is only necessary for multiple choice and multiple select where they choose one or many answers.

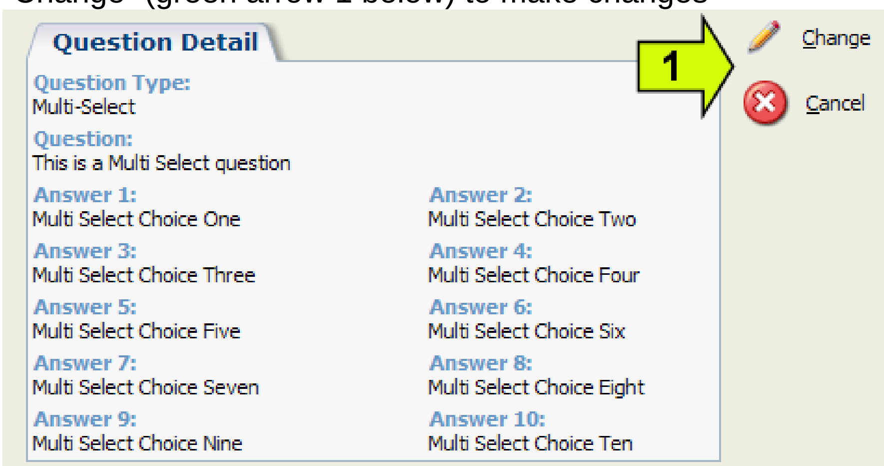
Upon completion click on “Save” (Orange arrow 4) to save your question. You can also click on “Cancel” to cancel and return to the previous page.

Question Modification

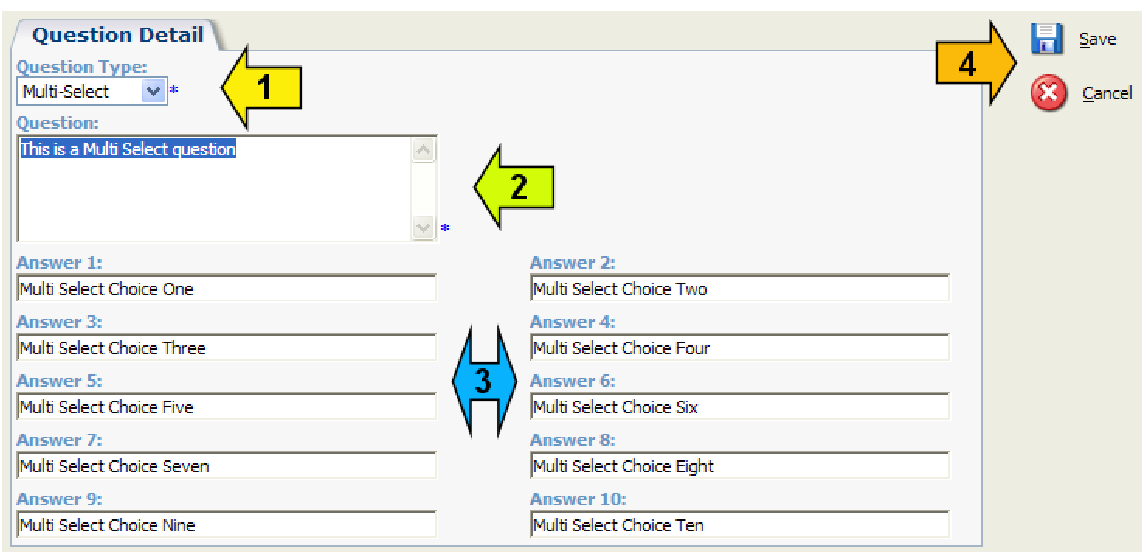
On the main question page, click on a question you wish to modify (yellow arrow 1 below)



Here you will find the question's detail page. Click on cancel to go back, or "Change" (green arrow 1 below) to make changes



Please read below to see the change screen.



In this screen, select "question type" if you wish to modify the type of question. (yellow arrow 1 above).

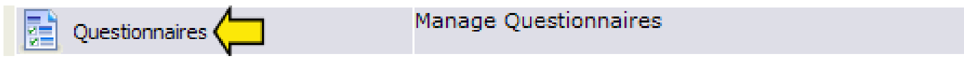
Then make any changes to the question (green arrow 2 above).

You can then modify the answers (arrow 3). Reminder: Long/short and yes/no questions don't require answers, only multiple choices and multiple select.

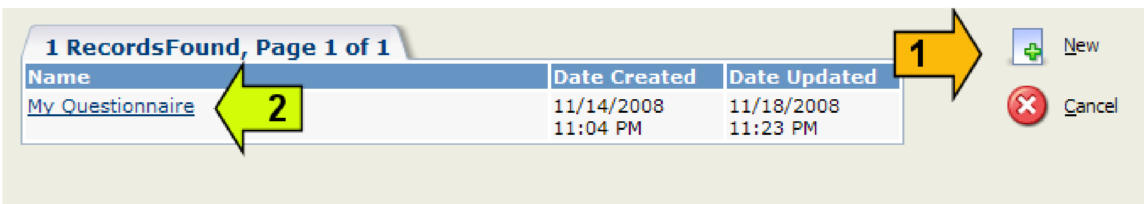
Hit "save" (orange arrow 4 above) to save your changes.

Manage Questionnaires

On the left side menu is an icon Int Comm, which will take you to the Internet Communicator Menu which will list items which you are responsible for.

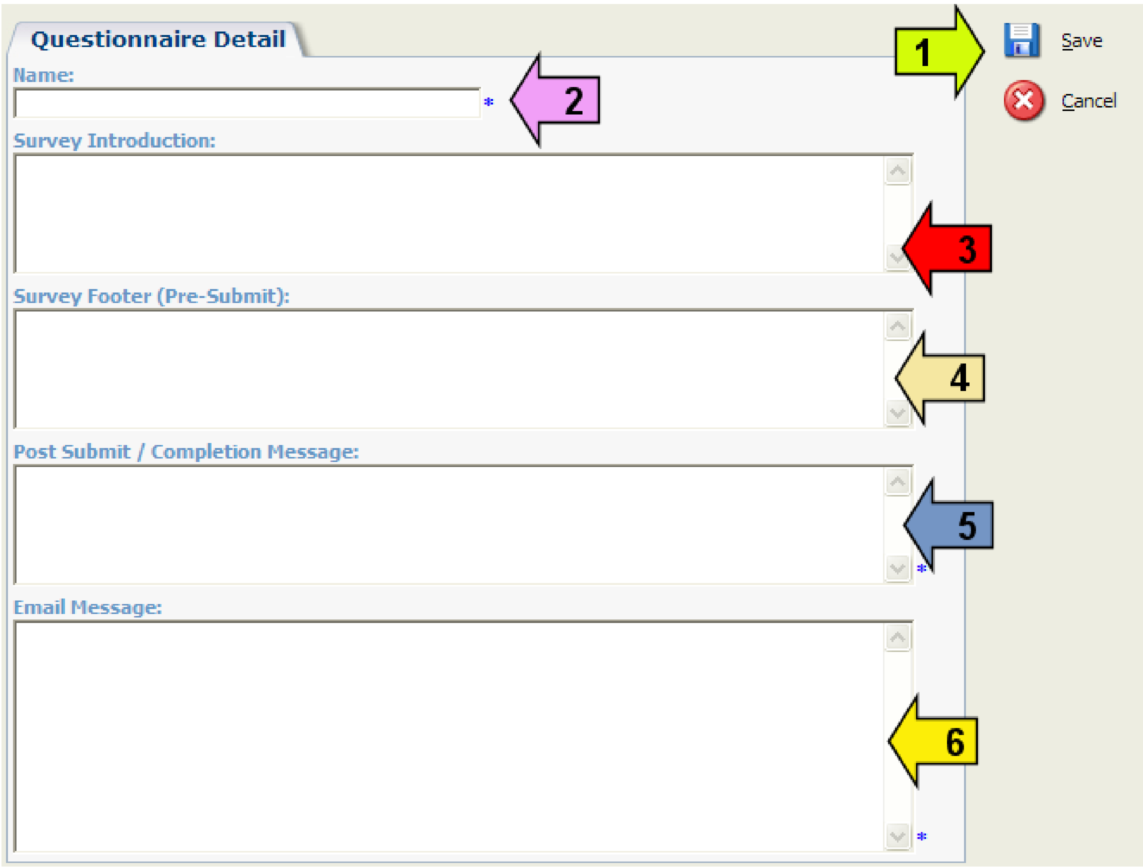


When you click on this, please choose “Questionnaires” (yellow arrow above) from the Internet communicator menu.



Click on New (orange arrow 1 above) to create a new questionnaire, or click on the questionnaire name to modify (green arrow 2 above)

Manage Questionnaires: Questionnaire Creation



In creating a new questionnaire, the above fields must be filled in.

The Name of the questionnaire. (Purple arrow 2). Please make this as distinct as possible.

Survey Introduction (red arrow 3) is the introduction people will read when they receive the survey.

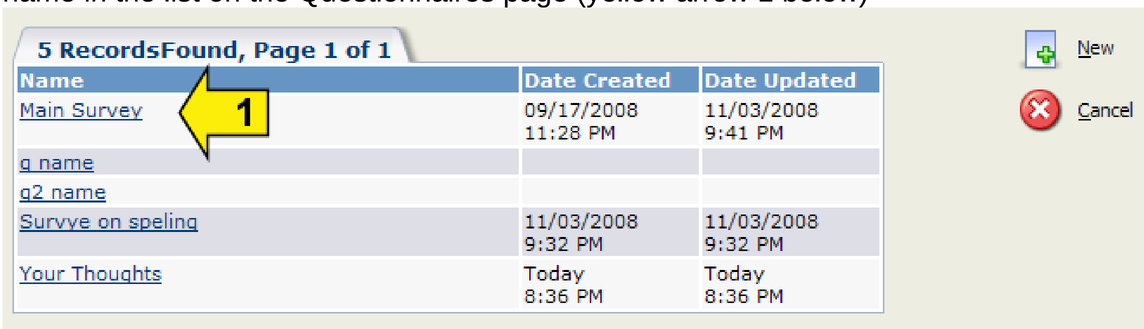
Survey Footer (Pre-Submit) (beige arrow 4) is the text at the bottom of the survey respondents will read prior to submission.

Post Submit (blue arrow 5) is the message respondents will see after submitting their survey response.

Email Message (yellow arrow 6) is the message that people will see when the survey invites lands in their email inbox.

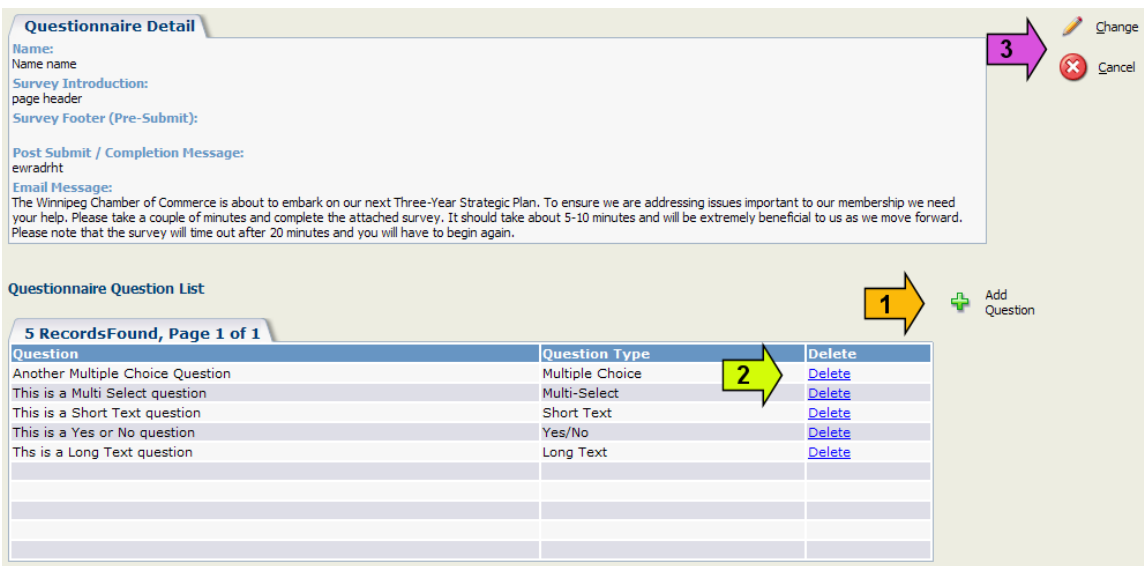
Manage Questionnaires: Questionnaire Modification

In the questionnaire detail page, which you arrive at after clicking on a questionnaire name in the list on the Questionnaires page (yellow arrow 1 below)

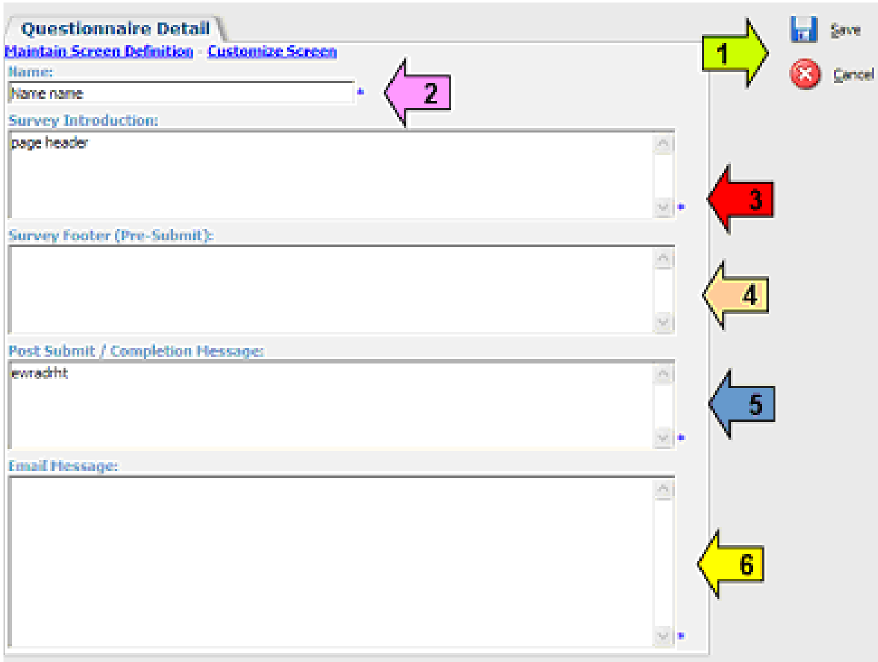


You will see the questionnaire details. Click on change 

(purple arrow 3 below) to change the questionnaire details.



Clicking on the questionnaire details page will bring up a page with the same…



Fields as found in creating a new questionnaire (page 23) can be modified.

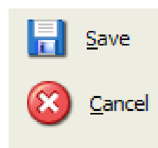
The Name of the questionnaire. (Purple arrow 2). Please make this as distinct as possible.

Survey Introduction (red arrow 3) is the introduction people will read when they receive the survey.

Survey Footer (Pre-Submit) (beige arrow 4) is the text at the bottom of the survey respondents will read prior to submission.

Post Submit (blue arrow 5) is the message respondents will see after submitting their survey response.

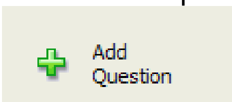
Email Message (yellow arrow 6) is the message that people will see when the survey invites lands in their email inbox.



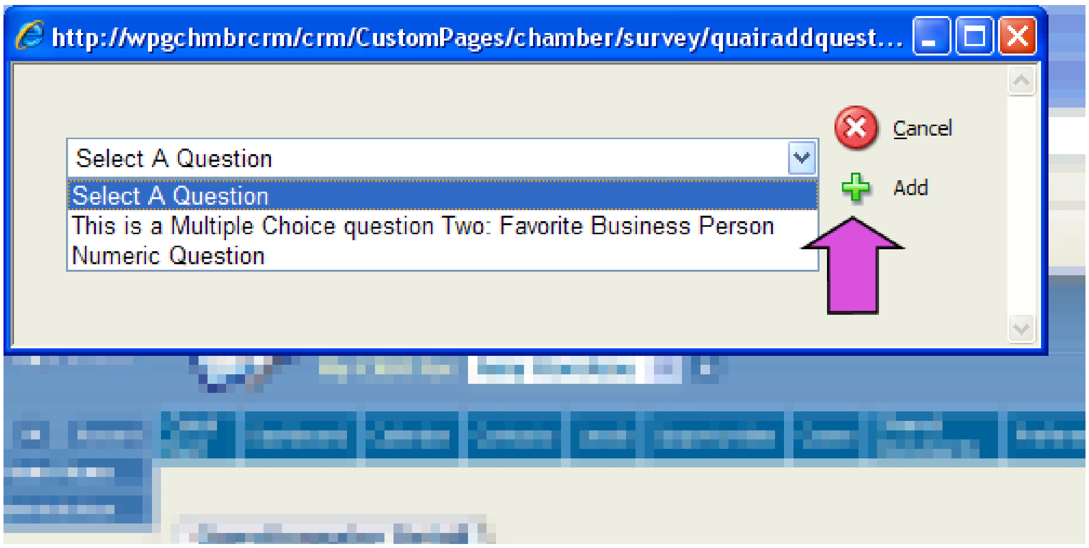
Modify these fields then click on save to save these changes, or cancel to return to the previous page without saving

Add a Question to questionnaire

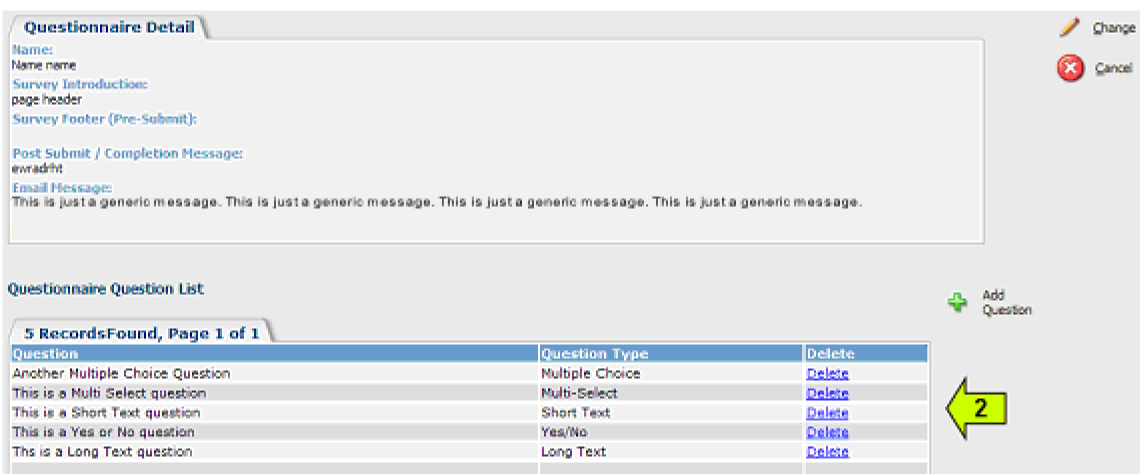
On the main questionnaire detail screen, you will see a link with add question (below)



This will pop open a pop-up window with questions that have **not** been used in this questionnaire. Select from the dropdown and click add (arrow below).



You will see the questions appear in the question detail (green arrow 2 below).



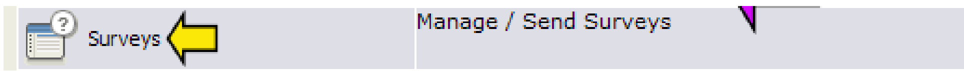
Click on "Delete" (green arrow 2 above) to delete questions you will not use.

Upon completion click "Cancel"  to return to the main questionnaire page.

Sending a Survey

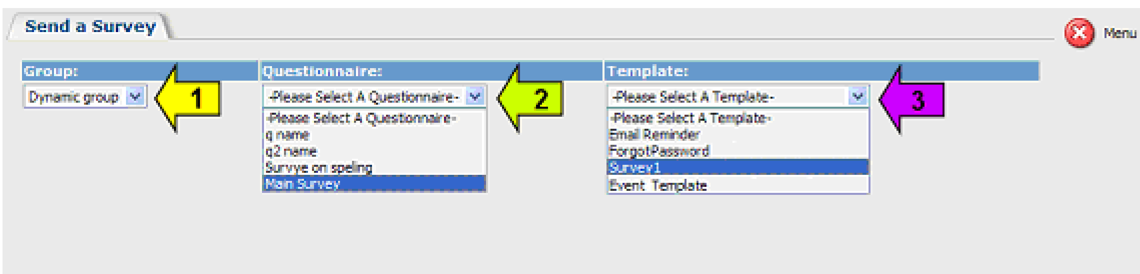
This covers sending surveys. Creating questions and questionnaires are further below.

On the left side menu is an icon Int Comm, which will take you to the Internet Communicator Menu which will list items which you are responsible for.



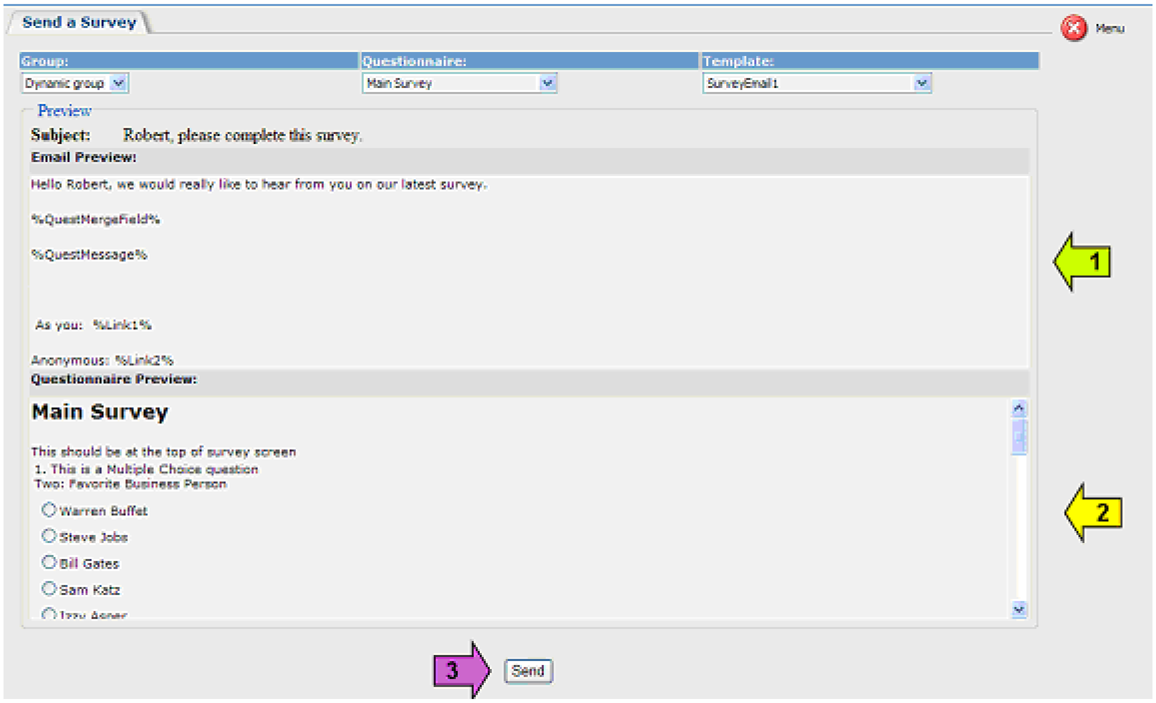
When you click on this, please choose “Surveys” (arrow above) from the Internet communicator menu.

This will open the “Send a Survey Screen”, on which there are three drop down menus.



The “Group” drop down menu (yellow arrow 1) is the group of people you will send to. Groups are pre-defined in another area of CRM. Please refer to the CRM manual for information on creating groups.

After selecting your group, choose the questionnaire from the drop down. It is important to give your questionnaires distinct names to avoid confusion (green arrow 2).   The final choice is to choose the template (purple arrow 3). After the choice the page will generate a preview screen (see below)

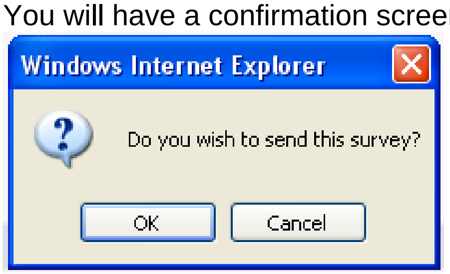


Upon choosing the group, questionnaire and template, the preview screen shows a preview of the e-mail to be sent (green arrow 1) This is based on the template in CRM, so you will notice some items with %percent signs%, these are used to personalize the e-mail. To learn more about templates, consult the CRM manual.

You will also see a copy of the survey that is to be send (yellow arrow 2). This is what the survey will look like to the recipient.

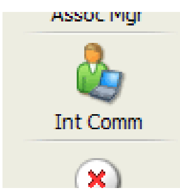
If you are satisfied with the template used, and the survey, click on “send” (purple arrow 3) to send the survey.

You will have a confirmation screen pop up (below)

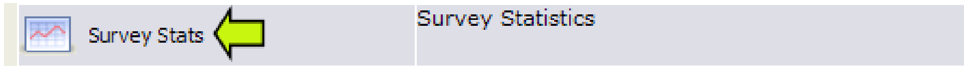


Click **ok** to send the survey, Cancel to not send.

Viewing Survey Statistics

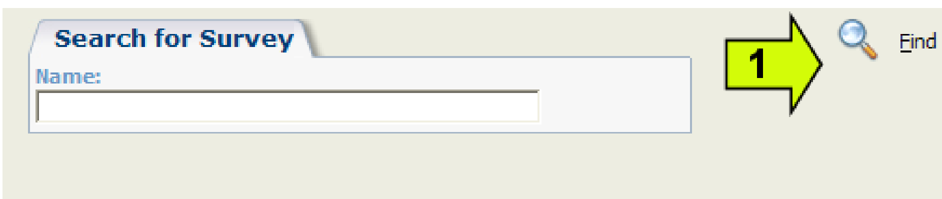


On the left side menu is an icon named after the company (arrow left). This will take you to the Company Menu which will list items which you are responsible for.



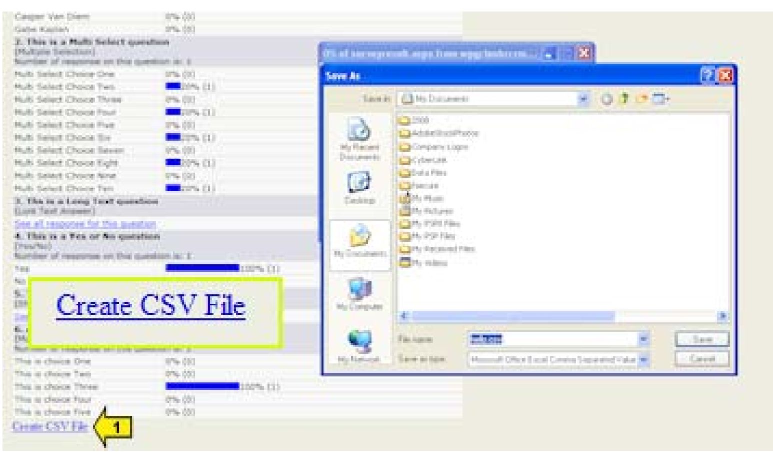
When you click on this, please choose “Survey Stats” (green above) from the company menu.

This will take you to the search for survey page to search for the survey to view stats on



Fill in the search field and hit “find” (green arrow 1. This will list the surveys sent. Click on one to see the overall stats for that survey.

From here you can see the stats on the survey and download a CSV of those items (below)

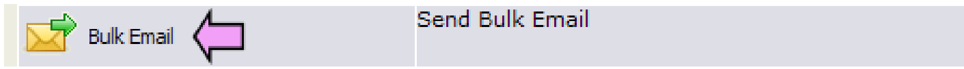


Click on “Create CSV file” (yellow arrow 1 above) to save a CSV of the survey stats.

Bulk Email

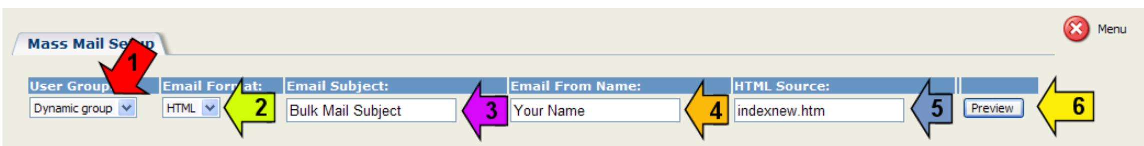
Send Bulk Email

On the left side menu is an icon Int Comm, which will take you to the Internet Communicator Menu which will list items which you are responsible for.

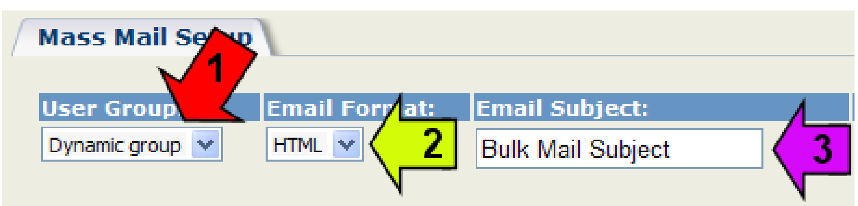


When you click on this, please choose "Bulk Email" (purple arrow above) from the Internet Communicator menu.

This will take you to the bulk mail screen. If you wish to return to the main company menu, click on cancel.

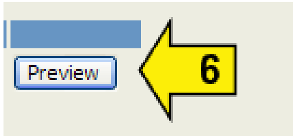


The above parts of the mass mail system will be split up and explained below.



First choose the group this will be sent to. Check your CRM guide on how to set up groups. (red arrow 1). Next select the e-mail format (green arrow 2). You can choose either text or html. Add in the e-mail subject which will be in the mass mail's subject (purple arrow 3).

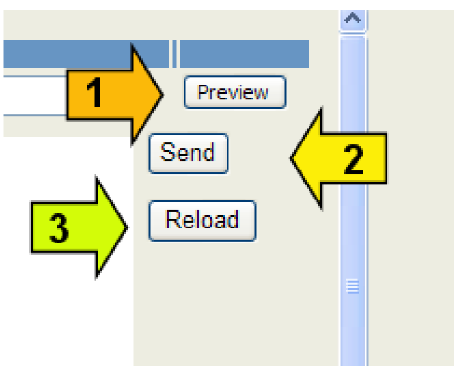
The next fields are the e-mail from name, which is the name the e-mail will appear to be from (orange arrow 4). For html e-mail, you can select the html page you created in front page for this e-mail. (Blue arrow 5).



After these are completed, click on Preview to see a preview of this mail on the same page. (Yellow arrow 6 above).

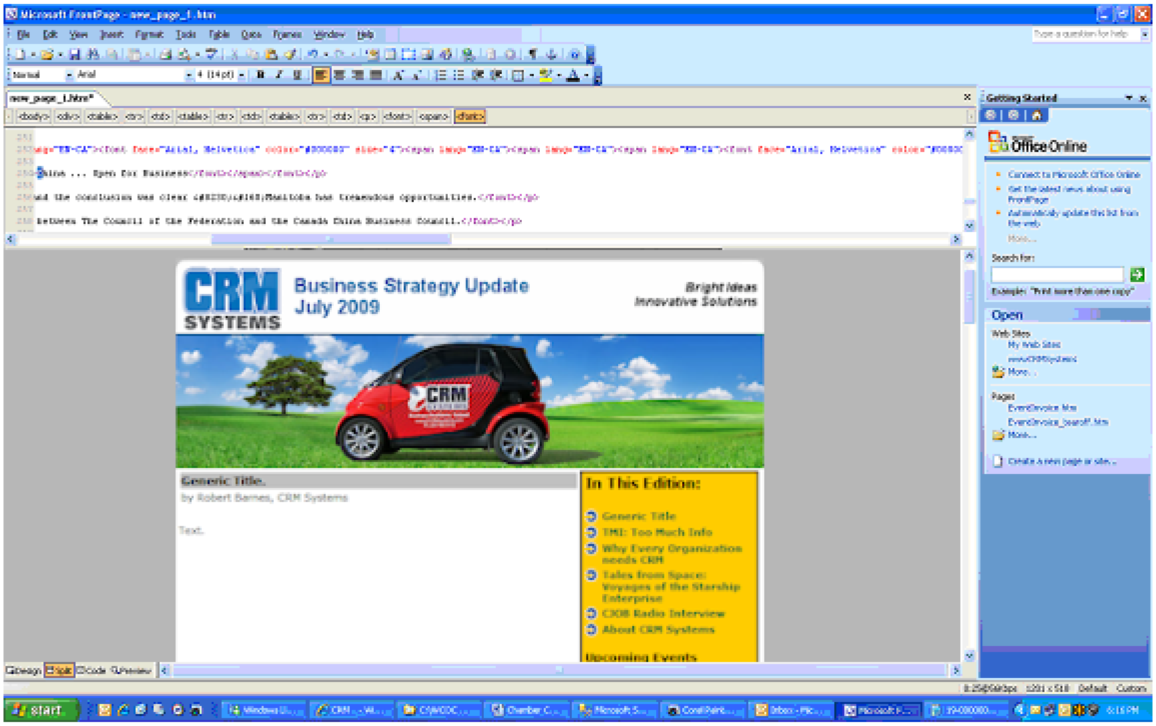
The preview area of the bulk mail, in this example an html e-mail. This is show by clicking "preview" (orange arrow 1 above).

To reload the template, click on reload button (green arrow 3 below). To send the mass mail, click on "send" (yellow arrow 2 below).



Bulk mail sent his way will allow you to track **viewing** of this e-mail as well as the number of times the **links embedded** in the mail have been **clicked**.

How to upload an html template from FrontPage to the server



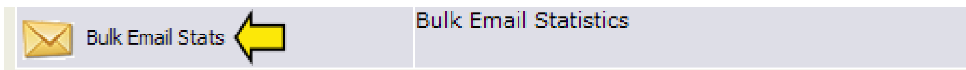
Create the template in front page (as seen above).

Save the html and graphics to a local folder.

FTP the page and graphics to the folder on the website for mass mail templates. This information will be given to you during training, and should be available to you in the CRM system notes.

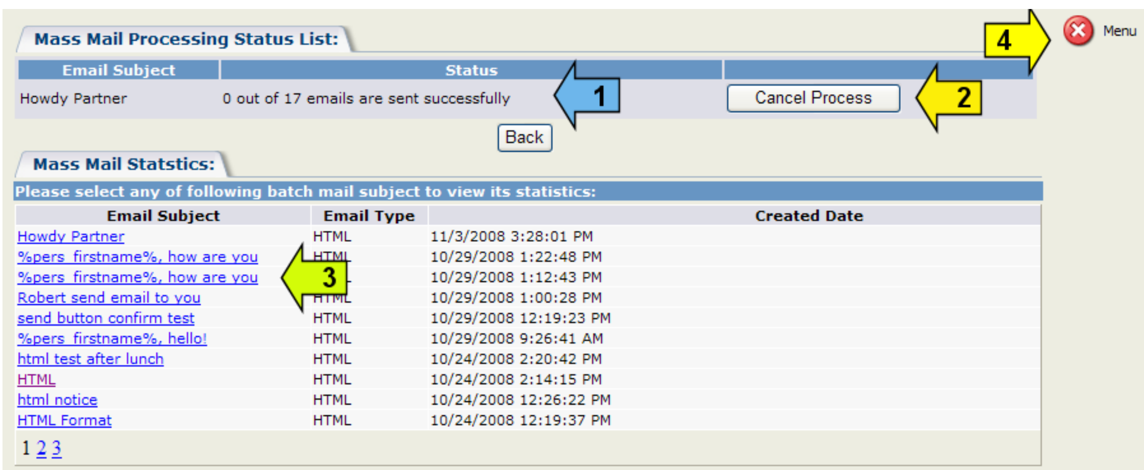
Bulk Email Statistics

On the left side menu is an icon Int Comm, which will take you to the Internet Communicator Menu which will list items which you are responsible for.



When you click on this, please choose “Questionnaires” (yellow arrow above) from the Internet communicator menu.

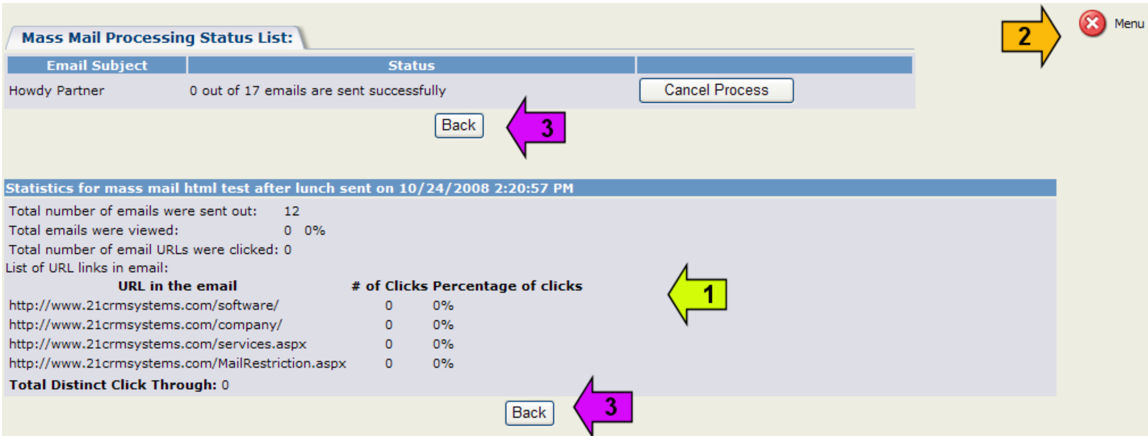
This will take you the bulk email stats screen. Click cancel (yellow arrow 4) to retun to the main company menu



Here you can see the status of mails being sent out (blue arrow 1) and cancel the process if required (yellow arrow 2). This will cancel the process, not stop the mails that have been sent already.

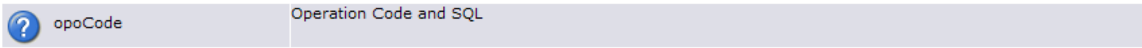
On this screen it will also list the mass mails sent out (green arrow 3). From here you can click on the mass mail you are interested in to see that statistics on that mail. This table also shows the type of mail sent out and the created date.

When you click on a mail, you'll see the mail details. (green arrow 1). You can click cancel (orange arrow 2) or back (purple arrows 3) to return to the previous screen.

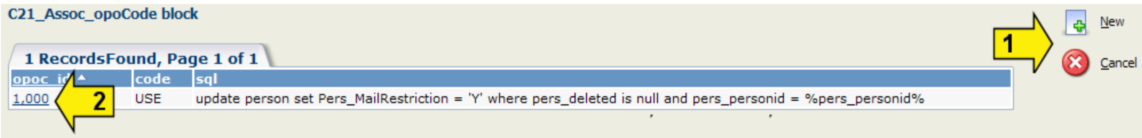


Opt out Control

In the internet communicator menu

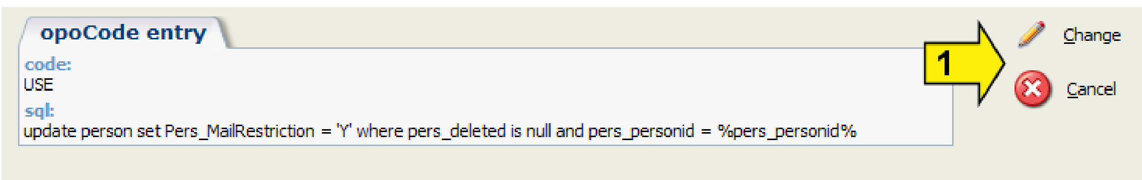


Choose OpoCode to select the opt out code. This will create a sql code to run when people opt out

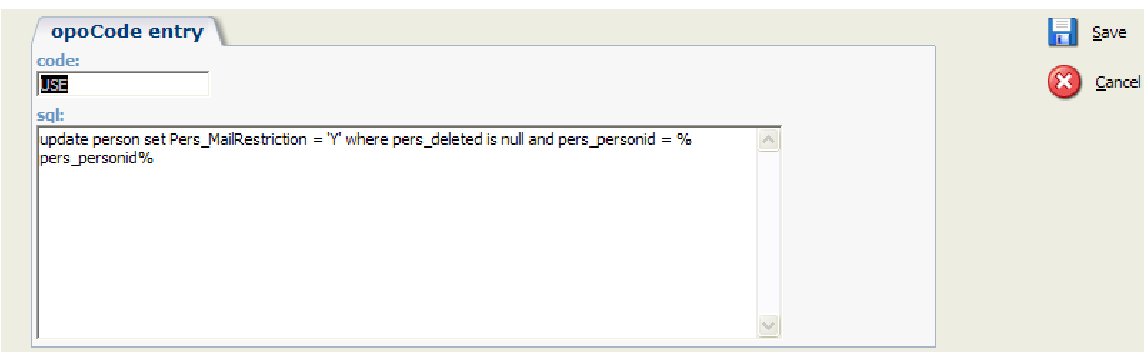


This will list the opt-out options which have already been created click one to modify (arrow 2 above), or “new” (arrow 1 above) to create a new opt out code.

Please note, the name of this opt out code (i.e. USE) would be added to the opt out line in your template: www.yoursite.com/mailrestriction.aspx?Optcode=USE



Here is the details of the opt-out code, click on change (arrow 1 above) to change it.



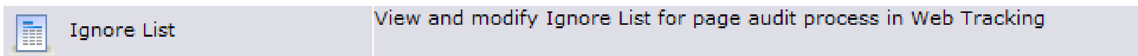
New or Change will have an identical similar screen, only new will have blank fields.

In this screen modify your code and sql statement to tell the system what to do when someone opts out and click “save” to save.

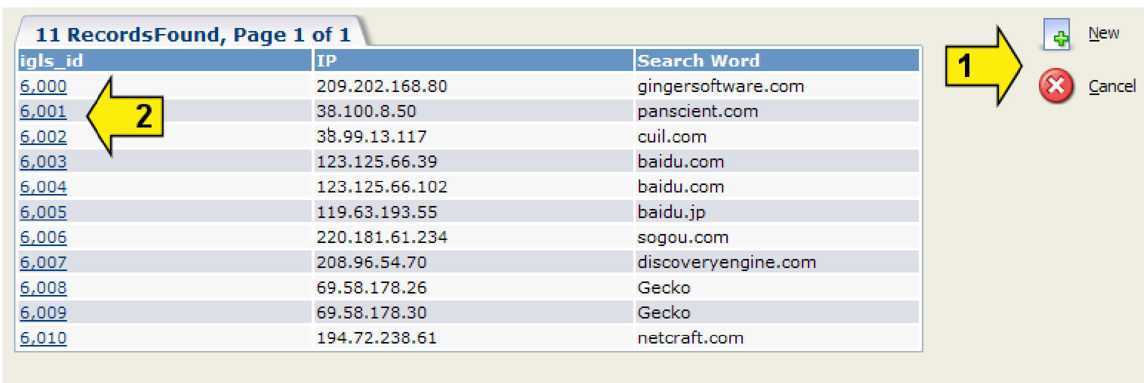
Ignore List

On the left side menu is an icon Int Comm, which will take you to the Internet Communicator Menu which will list items which you are responsible for.

Here you will click on "Ignore List" to set up the list of url's you would like the audit process to ignore.



Click on ignore list to see the list of IP's and domains to ignore in webtracking stats.

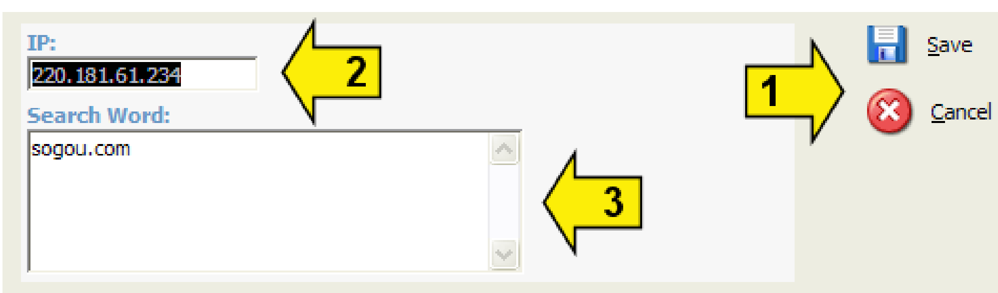


igls_id	IP	Search Word
6,000	209.202.168.80	gingersoftware.com
6,001	38.100.8.50	panscient.com
6,002	38.99.13.117	cuil.com
6,003	123.125.66.39	baidu.com
6,004	123.125.66.102	baidu.com
6,005	119.63.193.55	baidu.jp
6,006	220.181.61.234	sogou.com
6,007	208.96.54.70	discoveryengine.com
6,008	69.58.178.26	Gecko
6,009	69.58.178.30	Gecko
6,010	194.72.238.61	netcraft.com

This screen will list the sites the audit will ignore, including their IP addresses. You can click on an item (arrow 2 above) to edit. Or click on "New" (arrow 1 above) to add a new url to ignore.

Add new Item to the Ignore List

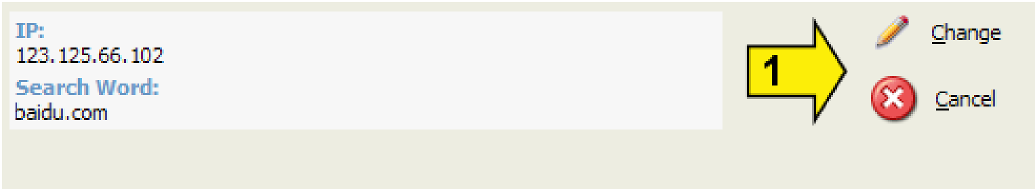
Click on New (arrow 1 above) and it will open the follow screen.



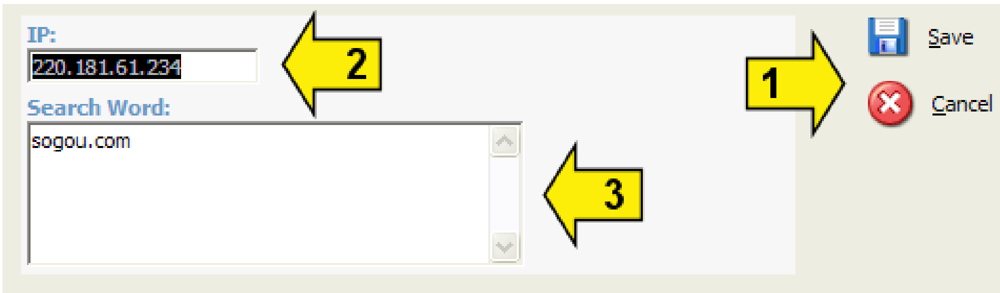
Add the IP address (arrow 2 above) and Search Word (arrow 3 above)(i.e. sogou.com) and click "save" (arrow 1 above) or cancel if you do not wish to proceed.

Edit Item in the Ignore List

Click on the item and it will open the details screen (below).



On this screen click on “change” to edit or “cancel” to return to the previous page (arrow 1 above).



When you click on Change you can modify the properties (above) and click on save (arrow 1 above).