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Mautic Documentation

Introduction

This book serves as the documentation for Mautic, the open source marketing automation system. Everyone is welcome to help make this information better and improve as needed.

Developer docs

If you are looking for some details about Mautic API, webhooks, theme or plugin development, go to Developer docs.

Download as PDF

Click here to download these docs as a PDF.

How to contribute to the docs

This repository is the source code for Gitbook published at www.mautic.org/docs. The source code is shared here on GitHub so anyone can contribute to the documentation in the same way the programmers do with the actual Mautic code.

Why is git used for the documentation

- *versions*. Anyone can go back and look at what the text looked like.
- *authorship*. Not only every file, but every line has its author.
- *community contributions*. No need to worry about deleting someone else's work while working on the same document.

Although some git knowledge is required to clone, modify, commit and push changes, there is a way how to avoid that and edit the files directly in the GitHub web interface. If you know git, use the workflow you like. If not, the following guide will show you how to contribute easily.

Edit documents in a browser

1. Fork this repository under your account so you'll have permission to edit.
2. Select a file to edit. The file structure is explained below. Now, let's edit the *README.md* file to show the principles. Click on it.
3. The content of *README.md* should be visible and the *Edit* button (the pencil icon) above as well. Hit it.
4. The content is written in Markdown markup. Very simple text based formatting.
5. Make a change to the file. For example add to the end `This is my first contribution`.
6. When you have made a change, scroll down and notice the form called *Commit changes*. This is important. To save a change, you have to describe what you've changed and why. Write for example `A new line added for testing purposes`. Do not save yet!
7. Because the GitHub web interface does not provide all features of git, we won't have an easy way to revert our change back to the original state. We'd have to create another commit where we'd delete the added line. That would make a mess in the commit history. So instead, we create a new branch. There is a checkbox for it "Create a new branch...". The branch has to have a name. `{yourusername}-patch-1` will be prefilled. Let's change it to `{yourusername}-testing`. Click the *Propose file change* button now.
8. Ok, so the change exists in your repository now. To propose the change to the official repository, you have to send a pull request (PR). You've been redirected to do just that. Here you describe your proposed change and click (please don't send the testing PRs) the *Create pull request* button.

If you want to clean up after the testing, go to the *Branches* section and delete the testing branch.

The file structure

We've worked with the *README.md* file in the previous section. This file is shown in the home page of a GitHub repository and you are reading its content right now. It doesn't have anything to do with the Mautic documentation.

The *SUMMARY.md* file defines the menu of the documentation. If you add a new page to the documentation, you'll have to also add a new line there defining the title and the link to the file. It's pretty straightforward when you see the current menu items.

The folders are here to group the topics together. Open for example the *asset* folder. You'll see it has its own *README.md* file. It is the main content when you click on the Asset menu item. The *manage_assets.md* file is a subitem. The *media* subfolder contains all the images used in the *md* files.

Links

Often you'll want to make a link into another place in the documentation. In Markdown, the link looks like this:

```
[link title](http://example.com)
```

This will create an external link with absolute URL. If you want to create an internal link, use a relative URL like this:

```
[these steps](./../plugins/integration_test.html)
```

This will link to `plugins/integration_test.html` on the documentation website created from the *md* source file.

Images

As noted above, the images can be placed in the media subfolders. The images probably aren't possible to upload via the GitHub web interface, but you can upload them to any public URL and link them from there.

```
![alternative text here](http://example.com/images/apple.png "Tooltip text here")
```

Or, if you want to display an image already uploaded to the documentation repository, you can use a relative path:

```
![alternative text here](/assets/media/assets-newcategory.png "Tooltip text here")
```

Getting Started

Awesome! You've downloaded a marketing automation tool. That's a great first step, but now you wonder where to go from here. Follow this very simple guide to get started using your shiny new toy!

Step 1: Install Mautic

If you have already downloaded the zip from the download page or have installed Mautic through some other source (Softaculous, Bitnami, Digital Ocean etc...) then you have already completed the first step. If not then you will need to upload the Mautic package (a zip file) to your server; unzip the files; and then navigate to that location in your browser. You will find Mautic has a very easy to follow on-screen installation process.

Step 2: Add Cron Jobs

Once you've installed Mautic you will need to create a few standard cron jobs to have your software process various tasks. These cron jobs can be created through a cPanel or added through command line. If you are unfamiliar or uncomfortable with this step then we'd recommend asking in the forums or in the live Slack chat. Here is a list of the cron jobs you'll need to create.

Updating Segments

```
php /path/to/mautic/app/console mautic:segments:update
```

Update Campaigns

```
php /path/to/mautic/app/console mautic:campaigns:rebuild
```

Execute Campaign Actions

```
php /path/to/mautic/app/console mautic:campaigns:trigger
```

Review Cron Jobs for more information on these and other optional cron jobs.

Step 3: Download the IP lookup service database

By default, Mautic installs set to use MaxMind's free GeoLite2 IP lookup database. Due to the licensing of the database, it cannot be included with Mautic's installation package and thus must be downloaded. Click on the cogwheel in the upper right hand of Mautic to view the Admin menu then click Configuration. On the System Settings tab, scroll down to find the IP lookup service option and click the "Fetch IP Lookup Data Store."

You could also choose another supported IP lookup service if you prefer.

Step 4: Install the Tracking Javascript

After installation and setup of the cron jobs you're ready to begin tracking contacts. You will need to add a simple javascript to the websites for each site you wish to track via Mautic. This is a very simple process and you can add this tracking script to your website template file, or install a Mautic integration for the more common CMS platforms. 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(s)://yourmautic.com/mtc.js','mt'); mt('send', 'pageview'); </script>
```

You'll need to change the site URL (replace yourmautic.com with your own URL) in the above script.

Checkout Contact Monitoring for more details.

What's New

In this section we'll highlight the new features for each major release of Mautic. They are in version order beginning with the latest.

Version 2.0

Mautic 2.0 brought a significant number of enhancements to Mautic. The full release notes are at https://github.com/mautic/mautic/releases/tag/2.0.0.

Hosting Requirements

- The PHP minimum version is now 5.6.19 (PHP 7 is supported!)
- The MySQL minimum version is now 5.5.3
- PostgreSQL support has been dropped

Cron Jobs Update

See Cron Jobs

Froala editor

This release switches CKEditor in favor of Froala editor which has a more polished look and functionality.

New email and page builders!

Email and page builders have been overhauled to be cleaner and better. This means that custom themes have changed as well. Watch this video for more.

Dynamic web content

You can now push contact aware content to your web pages through Mautic campaigns. See Dynamic Web Content

Bi-directional Salesforce Integration

This much anticipated feature is now in Mautic! For an overview watch this video.

Lifecycle stages

You can now track your contacts through various stages and lifecycles. Watch this video for more.

Updated Dashboard

Drag and Drop with new widgets for end-to-end attribution and more. Watch this video for an overview.

UTM Tags

A simple code you can attach to a custom URL to track content and more. The UTM tags that are currently supported are:

- utm_campaign

- utm_content
- utm_medium
- utm_source
- utm_term

For more information on this watch this video.

Dashboard

Mautic 1.4.0 brought a customizable dashboard where each user can compose widgets with information she/he wants to track. Mautic 2.0 brought a number of enhancements to the Dashboard.

Date range filter

All the widgets will display data in the selected global date range filter at the top of the widget list. The default date range is set from 30 days ago to today. Line charts will change the time unit automatically depending on the day count selected in the date range filter like this:

Date range is equal 1 day: Hours Date range is between 1 and 31 days: Days Date range is between 32 and 100 days: Weeks Date range is between 101 and 1000 days: Months Date range is greater than 1001 days: Years

The only widget exceptions which display the same information independent on the date range are *Upcoming emails* and *Recent activity*.

Widgets

Warning: Do not create too many widgets. It can slow the dashboard page load down. If you have performance issues, decrease the amount of widgets.

A new widget can be added to your dashboard when you click on the "Add widget" button. The "Add widget" form which appears after each widget will let you define:

- **Name**: Describe what the widget displays. If not filled, Mautic will call it the same as the widget type you select.
- **Type**: Select what information you want to display from the predefined widget types.
- **Width**: Select how wide the widget should be. The options are 25%, 50%, 75%, 100%. Default option is 100%. The optimal width for line charts is 100%, for tables 50%, for pie charts 25%.
- **Height**: Each widget can have different height. 5 heights are predefined. The dashboard will look best if you select a constant height for each widget in one row.

Some widgets have additional options:

Created contacts in time

- Show all contacts: Displays one line with all created contacts.
- Only identified: Displays one line with only created identified contacts.
- Only anonymous: Displays one line with only created visitors.
- All identified vs anonymous: displays 2 lines with created identified and visitors.
- Top segments: Displays up to 6 lines with contacts added to the top 6 segments. If no such segment exists for the selected date range, the chart will not be displayed.
- Top segments with Identified vs Anonymous: Displays up to 6 lines of the top 3 segments for the selected date range. Each segment will show 2 lines with identified and visitors.

Emails in time

- Only sent emails: Displays 1 line with sent emails.
- Only opened emails: Displays 1 line with opened emails.
- Only failed emails: Displays 1 line with failed emails.
- Sent and opened emails: Displays 2 lines with sent and opened emails.

- Sent, opened and failed emails: Displays 3 lines with sent, opened and failed emails.

Page visits in time

- Total visits - Displays 1 line with all visits (page hits).
- Unique visits - Displays 1 line with unique visits (contacts).
- Total and unique visits - Displays 2 lines with unique and all visits.

Widget ordering

Each widget can change its location by drag&dropping. The handle is its name.

Dashboard export

Each dashboard as you configure it can be exported to a single file. You can make a backup for another time, send it to a colleague or share it online. It exports only the widget configuration. Not the data in them.

Dashboard import

If you export a dashboard, you can then upload it and import it again in the Dashboard Import page.

Stock Mautic installation comes with 3 pre-defined dashboards. The one called *default.json* is imported automatically, when your dashboard doesn't contain any widget. The other 2 predefined dashboards are there as an example. You can export and import any other dashboard and then switch between them. Pre-defined dashboards can be:

Previewed - It will display the dashboard widgets for preview. It will load in them actual Mautic data. Nothing is saved or changed by the Apply button. Applied - It applies the dashboard as your dashboard. Warning: Your current widgets will be deleted by this action! Export the current dashboard if you want to get back to it later. Deleted - It will delete the predefined dashboard.

Widget cache

The WidgetDetailEvent automatically caches the widget detail data for a period of time defined in the configuration. Default cache expiration period is 10 minutes.

Dashboard Permissions

If a Mautic user doesn't have the see others or see own permissions for a bundle, she/he won't be able to create widgets for said bundle. However, the widget can still be visible at hers/his dashboard. For example if a user creates the widgets and then the admin removes the permission or via import. In that case the widget is there, but with a message that the user doesn't have permission to see the data.

If a Mautic user has permission to see only his/hers own data from a bundle, he/she will see only his/hers own data in the Dashboard widgets. For example only contacts which he/she owns, page hits of the pages he/she created and so on.

Contacts

Leads were renamed to contacts in Mautic 1.4.0.

Contacts are the central factor of a marketing automation platform. These are all the individuals who have visited your websites or interacted with you in some way.

Contact Types

There are two types of contacts:

- **Visitors** (formerly anonymous leads) — visitors to your site who have not yet been identified by a form or other interaction.
    - These contacts are tracked by Mautic 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.

Visitors (formerly anonymous leads)

Anonymous leads were renamed to visitors in Mautic 1.4.0.

You can view visitors by using the 'table view' (use the "t" keyboard shortcut to view contacts in a table or "c" as cards) within the contacts section.

Visitors are worth tracking, because these could be future customers. By tracking them before they have any 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.

Search Text

```
is:anonymous
```

Screenshot

The resulting list will be those IP addresses which have not yet provided identifying information.

Standard Contacts

The second type of contact is a standard contact. These contacts have identified themselves via a form or other source — you may also have more information about them from previous interactions. As a result, these contacts typically have a name, email, and other identifying information which can be associated with the contact.

The standard contact is the preferred contact within Mautic. These are contacts which may have started as a visitor, but at some point provided additional information such as a name, email address, social network handle, or other identifying characteristics. You can nurture these contacts through the Mautic marketing automation platform.

The Manage Contacts section provides more information on what you can manage with standard contacts.

Manage Contacts

The manage contacts page is the main interface through which you can view and interact with your contacts - both visitors and standard contacts.

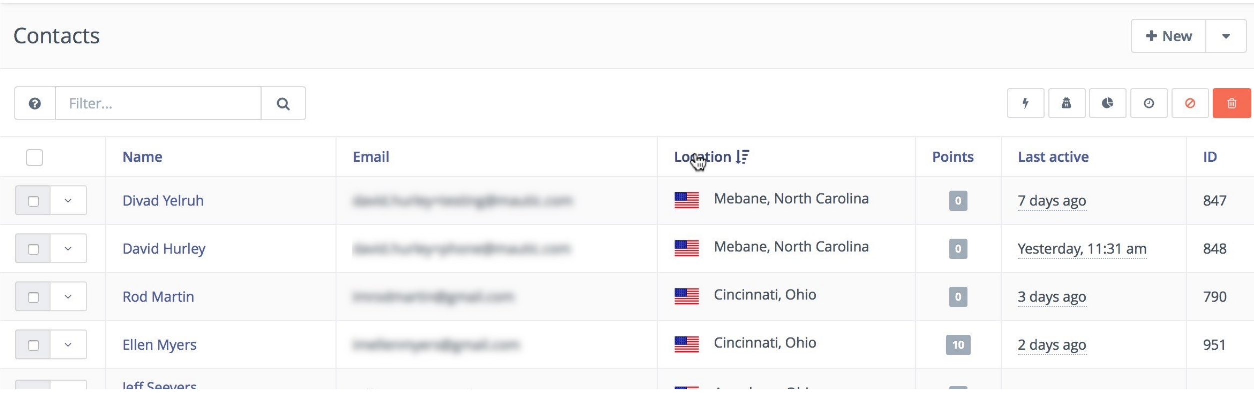
Segments

The segment is the default tabular view of all the contacts in the system - by default the **list view** is enabled, but you can also choose to switch to the **card view** (also known as **grid view**) which uses avatars to depict the contacts visually using cards. Clicking the appropriate button on the top right will allow you to switch between the two views.

Hint: If you prefer using keyboard shortcuts you can enter "t" on your keyboard to dynamically switch to table view and "c" to switch to the card view.

Searching for contacts

The segment can be searched using the box at the top of the list, and can be ordered using the table headings by clicking on the heading you wish to sort the list by.



The search box allows many different search types and follows the same search process and variables as found in all other search layouts. You can learn more about the powerful search options available on the search documentation page.

Adding contacts quickly

If you have contacts you would like to quickly add to Mautic manually, and they are not in the system as part of the normal workflow (for example by completing an inquiry form or having been imported) you can use the Quick Add Contact button to add them to the system.

You can of course also add them through the New Contact form and add much more detail but for quick entry this is the easiest and fastest way to get the contact into the system.

Adding contacts normally

If you have contacts to import and you have time to add all the information, click on the dropdown arrow to the right of 'Quick Add Contact' and select 'New'. This opens the new contact screen, where you can enter all the information you have about the contact. Use the tabs at the top to add custom fields and social network profiles.

Importing contacts

Mautic offers the ability to import contacts from other sources via CSV file - this is a great way to get up and running quickly if you need to import a lot of contacts at once.

To use the import facility, make sure that you first have all the fields set up under 'Manage fields' which correspond to the information you are importing - you don't want to lose any data if at all possible.

Once you have created all the contact fields, click on the dropdown arrow to the right of the Quick Add Contact button, and select 'Import'.

Upload your CSV file, and ensure that you match the delimiter, enclosure and escape characters so that the importer can understand the data.

When you click on 'Upload' you will have the opportunity to match the fields found in the CSV file to the fields that you have in Mautic, which will allow the data to be correctly imported.

Following values will result in TRUE when importing a Boolean value: `1`, `true`, `on` and `yes`. Those values can be also capitalized and still taken as TRUE. Any other value will be saved as FALSE.

Editing contacts

To edit a contact, click on the name of the contact (or the IP address if the visitor is anonymous) to open the contact screen.

From this screen, you can view the recent events and any notes that have been made against the contact.

To edit the contact, click on the 'edit' button on the top-right menu.

Contact duplicates

When Mautic tracks contact's actions like page hits or form submissions, it will automatically merge the contacts by unique identifiers which are:

- IP address
- Email *(or any other contact field you mark as unique identifier)*
- Cookie

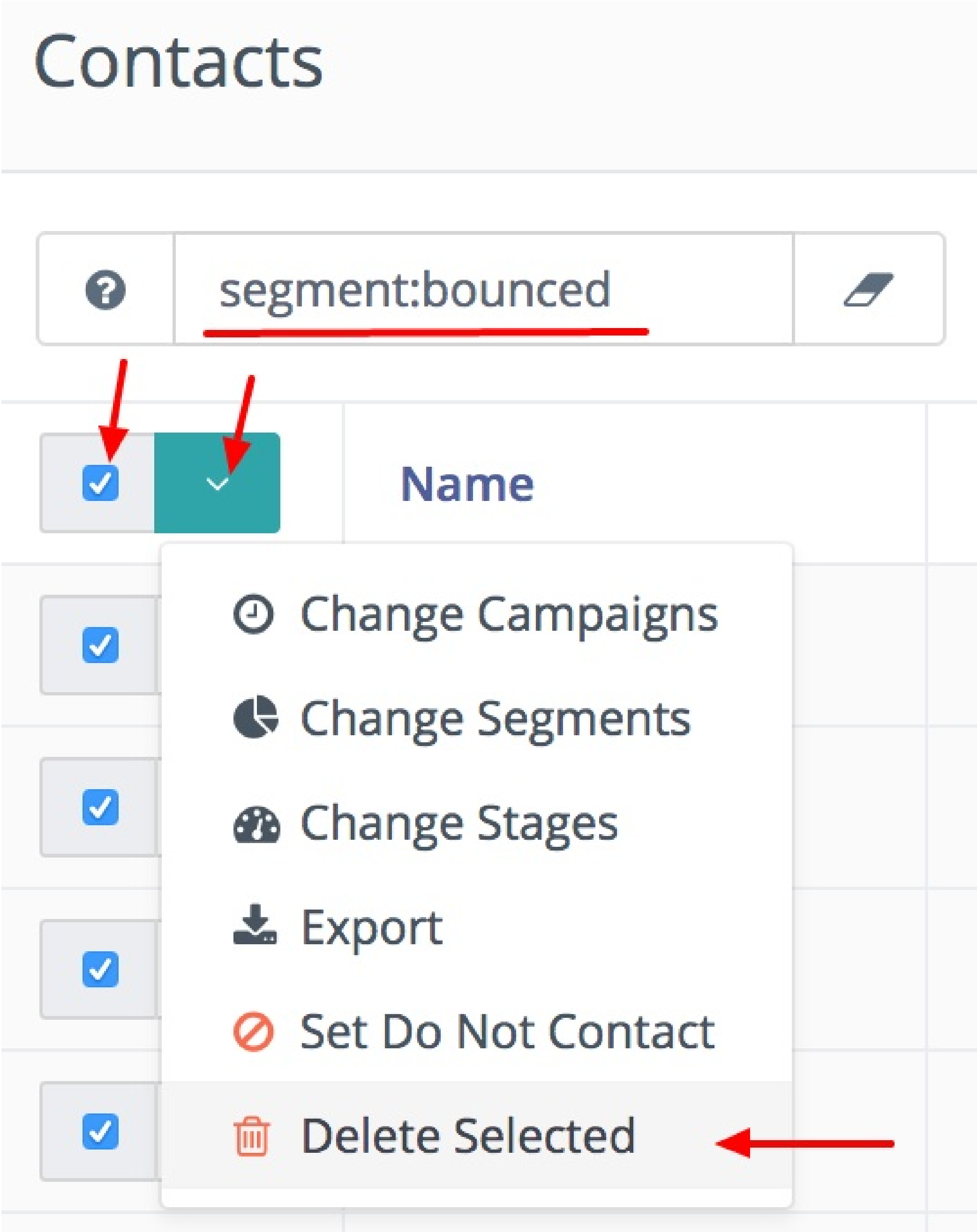
If Mautic knows only the IP address, it will merge the contact action (page hit, form submission etc.) with a contact with the same IP address. If the IP address does not exist in the Mautic database yet, it will create a new contact. But if Mautic knows the unique cookie, it will merge the actions to the contact with the same cookie or creates a new one.

If a contact sends a form with an email address, it will merge the submission with the contact having the same email address. Even if the IP address or the cookie matches another contact.

So Mautic will take care of duplicate contacts created by the event tracking. But you can still create a duplicate contact via the Mautic administration. As of Mautic 2.1.0, you will be notified if there is already a contact with the same unique identifier.

Delete a bunch of contacts

The batch delete action in the contact table allows deletion of up to 100 contacts at one time. This is a performance precaution since deleting more contacts at one time could cause issues. This feature can be used for hundreds of contacts.



See in the segment docs about how to delete thousands of contacts easily.

Contact Overview

Each contact has a detail page where you can see what Mautic knows about him/her.

Engagements/Points chart

The Engagements line chart display how active the contact was in the past 6 months. Engagement is any action the contact made. E.g. page hit, form submission, email open and so on. The chart displays also the points which the contact received.

Avatar

Mautic will try to download the contact's avatar image based on his/her email address from the Gravatar service. But it can be loaded also from some social networks.

History

The main tab displays the contact's action history sorted from the latest to the oldest. Each action will display as many details as there is about it. For example a form submission will display what values the contact submitted, the email send action will inform you whether the email was opened and when and so on. You can filter what actions you want to include or exclude from the timeline if you are searching for a specific one.

Notes

Mautic can be used as a basic CRM. You or your teammates can write notes for a specific contact. A note can be marked with a specific purpose: General, Email, Call, Meeting. It's also possible to define a date of a meeting or a call. If you do so, the note will also appear in the Mautic calendar.

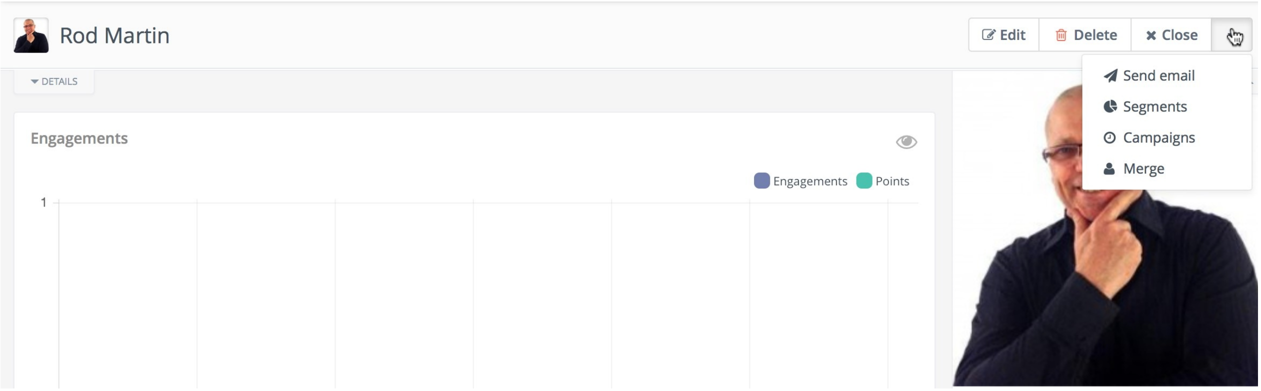
Social

If the social plugins like Facebook or Twitter are enabled and authorized and the contact provided you a username for a social network, Mautic can display his/her feed for the social network in the Social tab. Most of the social networks limited their API since the feature was developed so search by email is not working.

Map

If Mautic knows the coordinates of the contact from a geolocation IP lookup service, it will display a fourth tab with a map so you can easily see where in the world the contact is located. If Mautic knows more locations for this contact as he/she travels, you'll see all the locations there. If Mautic doesn't know any location, the tab won't show up.

Change contact segments



Click the drop down box arrow in the top right hand corner of the contact detail. Select *Segments*. A modal box will show up where you'll see all the segments. The green switch means that the contact belongs to the segment, the orange switch means the opposite. Click the switch to add/remove the contact to/from the segment.

Change contact campaigns

Click the drop down box arrow in the top right hand corner of the contact detail. Select *Campaigns*. A modal box will show up where you'll see all the campaigns. The green switch means that the contact belongs to the campaign, the orange switch means the opposite. Click the switch to add/remove the contact to/from the campaign.

Merge two contacts

If you have 2 contacts in the Mautic database who are physically one person, you can merge them with the Merge feature. Click the drop down box arrow in the top right hand corner of the contact detail, select the *Merge* item, a modal box will show up. Search for the contact you want to merge into the current contact. The select box will update as you search. Select the right contact and hit the *Merge* button.

Send email to contact

The drop down menu in the top right corner of the contact detail page also lets you send an email directly to the contact. You can fill in *From Name*, *From* (email address), *Subject* and the *Body* message. You can also *Import from an existing template*. If you select some email from this select box, the Subject and the Body textarea will be prefilled from that pre-defined email template. Emails sent by this method are not tracked by Mautic.

Contact Monitoring

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

Website Monitoring

Monitoring all traffic on a website can be done by loading a javascript file (since Mautic 1.4) or adding a tracking pixel to the website. It is important to note that traffic will not be monitored from logged-in Mautic users. To check that the JS/pixel is working, use an incognito or private browsing window or simply log-out of Mautic prior to testing.

Javascript (JS) tracking

JS tracking method was implemented in Mautic 1.4 and recommended as the primary way of website tracking. To implement it, go to *Mautic configuration > Landing Page Settings* to find the JS tracking code build for your Mautic instance and insert its code before the ending `<body/>` tag of the website you want to track. Or copy the code below and change the URL to your Mautic instance.

As of 2.3.0, Mautic sets cookies with a lifetime of 2 years. Returning visitors are identified exclusively by the cookie. If no cookie exists yet, Mautic 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 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)://yourmautic.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 Mautic. Also, change [yourmautic.com] to the domain where your Mautic runs.

The advantage of JS tracking is that the tracking request which can take quite long time to load is loaded asynchronously so it doesn't slow down the tracked website. JS also allows 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** the URL of the current website.

mt() Events

As of 2.2.0, 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

As of Mautic 2.2.0, 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 Mautic's REST API as well.

Valid Domains for CORS are expected to include the full domain name as well as the protocol. (e.g. http://example.org). If you serve up secure and non-secure pages you should include both https://example.org as well http://example.org. All subdomains will need to be listed as well (e.g. http://example.org and http://www.example.org), if your server allows this. If you would like to allow all subdomains, an asterisk can be used as a wildcard (e.g. http://*.example.org).

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 Mautic 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 a 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 (beta feature)

Mautic 1.4.0 comes with a tracking feature called fingerprint. Fingerprint2 library was used. It should work together 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 already 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** - Width 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 called exactly like the name 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 the future fingerprint tracking. It is not a tested feature though, do not use it on production unless you tested it first.

Tracking Pixel tracking

This method is secondary since Mautic 1.4.

```
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

Mautic 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 was introduced in version 1.2.1. Currently, `utm_medium` , `utm_source` , `utm_campaign` , `utm_content` , and `utm_term` are used to generate the content in a new 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.

All the Utm tags are available in the time entry, just by toggling the entry details button.

Please note that UTM tags are recorded only on a form submission that contains the action "Record UTM Tags".

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%20
```

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-mautic.com/mtracking.gif?d=' . $d . '" style="display: none;" />';
```

Javascript

```
<script>
var mauticUrl = 'http://your-mautic.com';
var src = mauticUrl + '/mtracking.gif?page_url=' + encodeURIComponent(window.location.href) + '&page_title=' + encodeURIComponen
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 Mautic 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.

Available Plugins

Mautic 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 that tracking pixel to your website.

- Joomla!
- Drupal
- WordPress
- TYPO3
- Concrete5
- Grav

These are just a few of the integrations already created by the Mautic 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.

Mobile Monitoring

The essence of monitoring what happens in an App is similar to monitoring what happens on a website. Mautic 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.

Steps in Mautic

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 Mautic.

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_mautic/form/submit?formId=<form_id>
```

You can get the ID from the mautic URL as you view / edit the form in the Mautic 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.

1. Define in your campaigns the screens you want to use as triggers (e.g. 'cart_screen' etc.). Mautic 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
```

In your App

A best-in-class approach is to have a class (say 'mautic') 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).

```
mautic.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:

```
mautic.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 mautic.addcontact POST request prior) AND that you reuse this cookie from one request to the next. This is how Mautic (and other tracking software) knows that it's really the same user. If you can't do this, you may run into the (unlikely but possible) case where you have multiple contacts from the same IP address and Mautic will merge them all into a single contact as it can't tell who is who without a cookie.

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.

Troubleshooting

If the tracking doesn't work, take a look at Page troubleshooting or Email troubleshooting

Contact Import

Contacts can be imported via the user interface from a CSV file.

How to import contacts

1. Go to *Contacts*.
2. In the top right corner above the table of contacts open the sub menu of actions and select the *Import* option.
3. Upload the CSV file with contacts you want to import.
4. Adjust the CSV settings if your CSV file uses something else as a delimiter, enclosure and so on.
5. Upload your CSV file.
6. The field mapping page should show up. 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 Mautic contact custom fields. The third set of options will let you map columns from your CSV to special contact attributes like *Date Created* and so on.
7. When your field mapping is ready, click the *Import* button.
8. A page with a progress bar will appear so you can see the actual state of the import in progress.
9. When the import is finished, the potential import issues will appear below the progress bar.

Requirements

- The CSV file must be in UTF8 encoding. Other encoding may cause troubles while importing. Read documentation of your spreadsheet program on how to export a spreadsheet to UTF8. Google Sheets encodes to UTF8 automatically, Libre/Open Office let you choose before export.

- In case of boolean values like `doNotEmail` or custom boolean field, use values `true`, `1`, `on` or `yes` as TRUE value. Anything else will be considered false.

- In case of date/time values, use `YYYY-mm-dd HH:ii:ss` format i.e. `2017:01:02 19:08:00`. Other formats may work too, but it may cause troubles.

Tips

- Name the column names the same as Mautic contact custom field names. This way Mautic automatically pre-selects the mapping for you. For example if you name the first name column as `firstname`, this field will be mapped automatically.

- If your CSV contains thousands of contacts or more, divide such CSV into several smaller CSV files to avoid memory issues and slow import speed.

FAQ

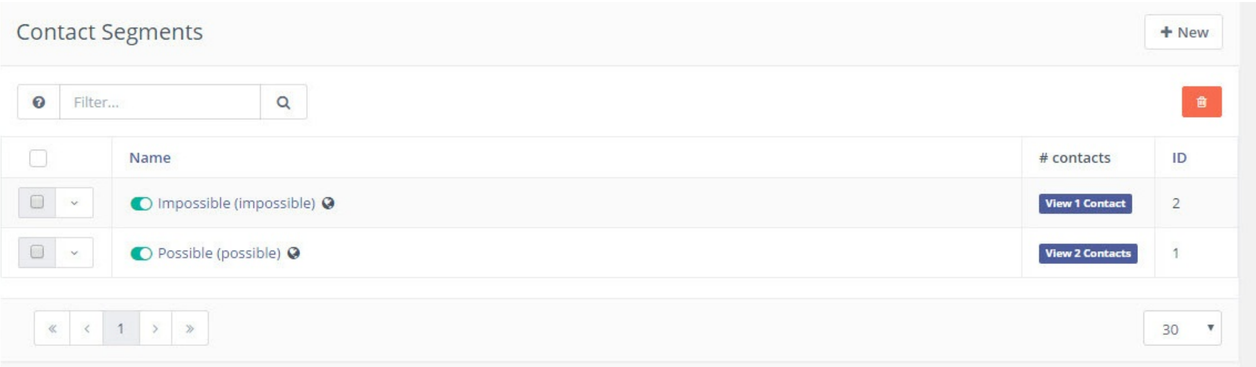
Q: If I import *Do Not Contact* values, is that stored as a bounce or a unsubscription? A: It's stored as a manual unsubscription. It's the same thing as if the contact was marked as *Do Not Contact* from the administration.

Manage Segments

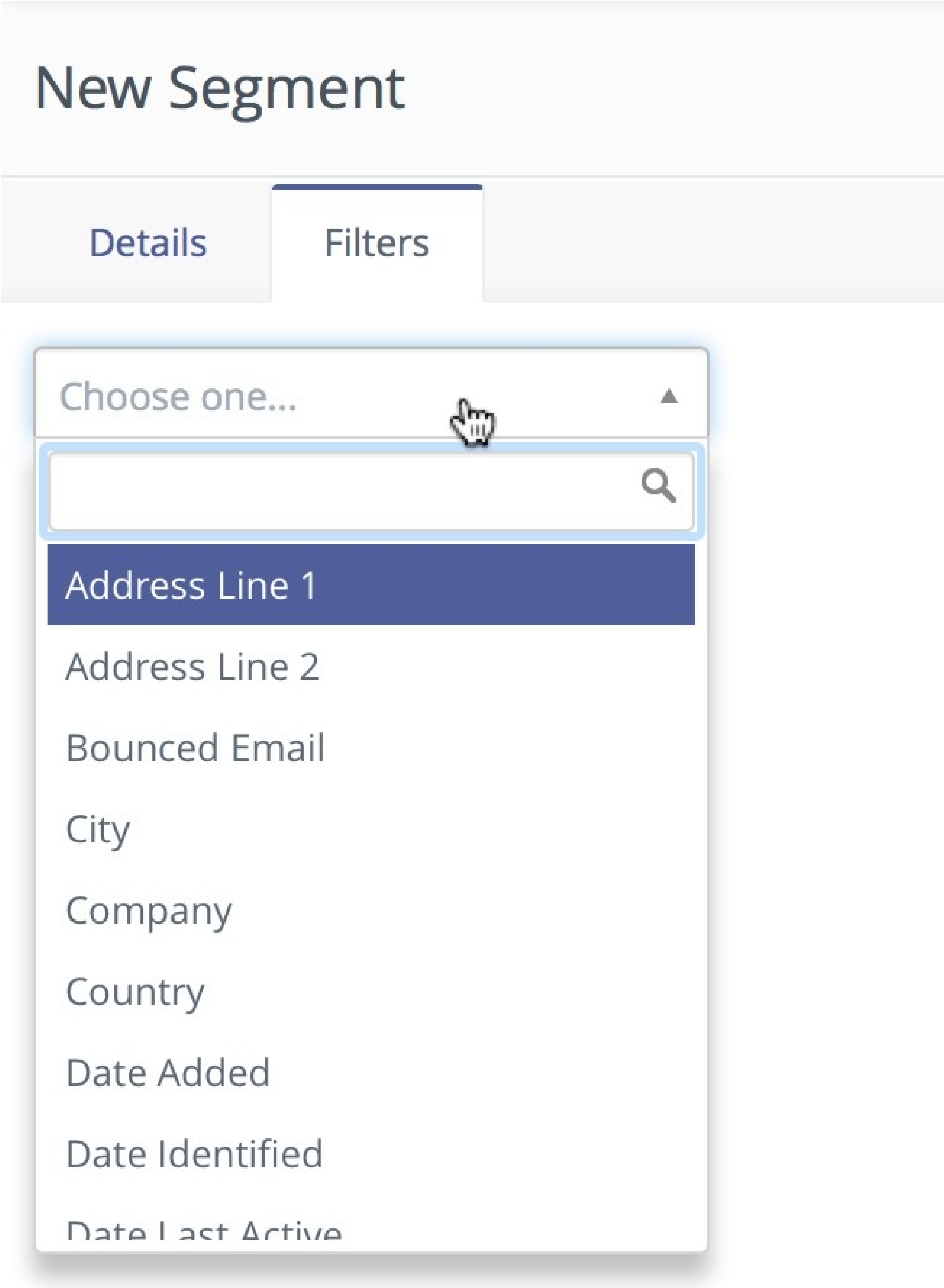
Lead lists were renamed to segments in Mautic 1.4.0.

Segments provide ways to easily organize your contacts. These segments can be configured from a variety of fields.

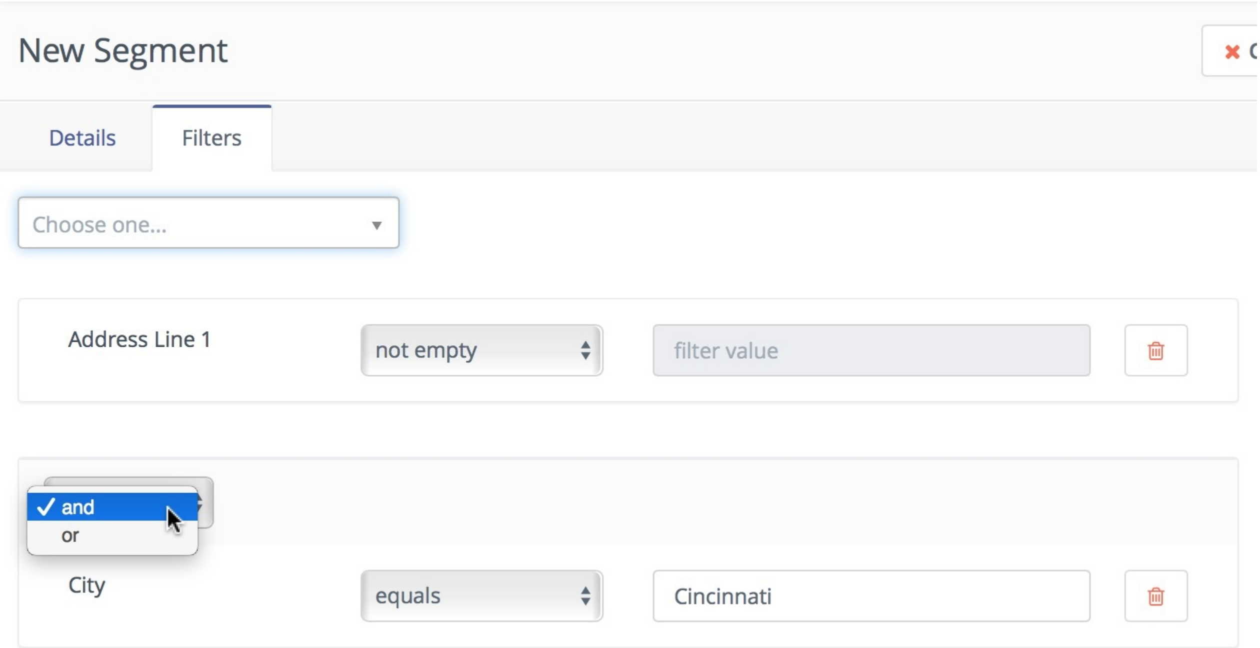
When viewing all segments you will notice the column on the right which shows the number of contacts matching that particular segment.



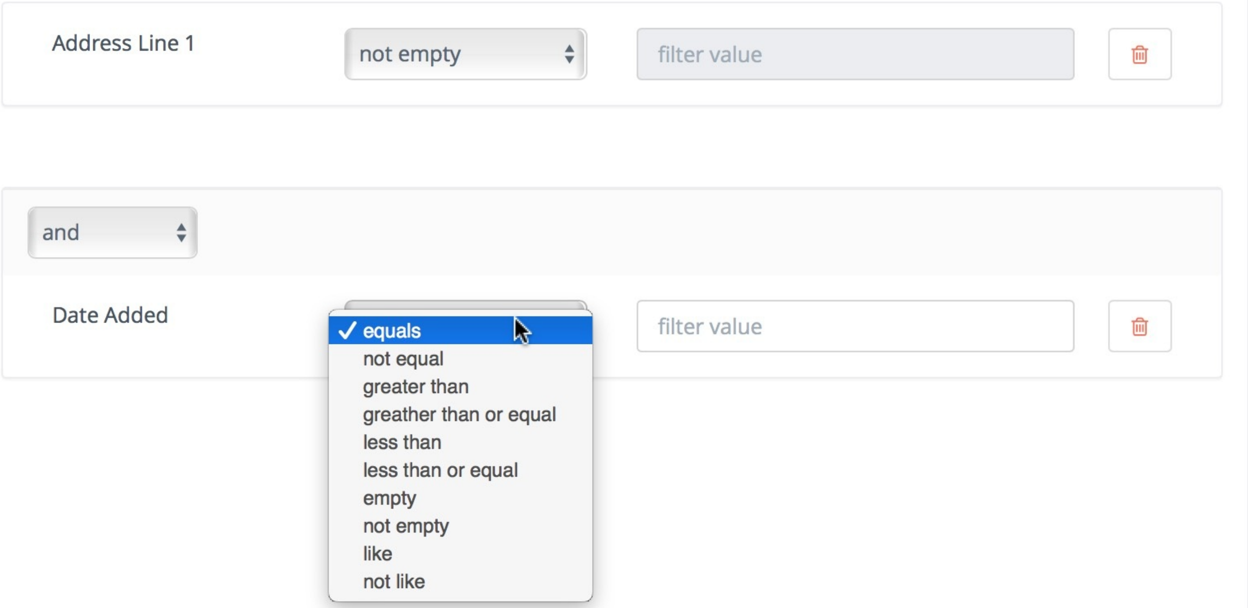
Segment Filters



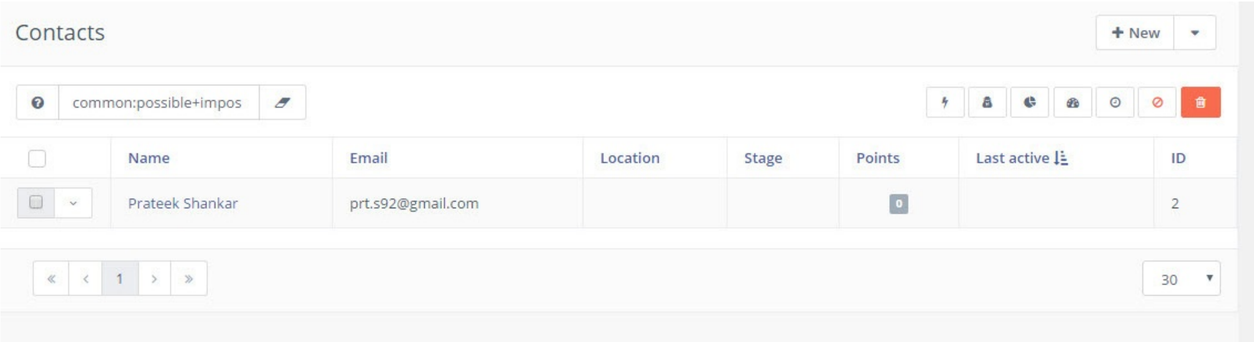
In addition, these filters can be combined to either be inclusive or exclusive depending on your needs.



Once you have selected the field you can then choose the type of operation to perform. These vary depending on the way you wish to filter your contacts.



If you want to divide your segment based on certain criterion, and you wish to avoid sending duplicate emails to the (sub)segments, you can view and alter them through typing the alias name of the contact segments separated by '+' only. You can add n contact segments to have their common, but you will always recieve the result as the intersection of the subsets. You can then manipulate the contacts to remove them from either one subset or all, hence avoiding duplicate emails to the same leads in the subsets.



Segments

Once you have created your segment, any applicable contact will be automatically added through the execution of a cron job. This is the essence of segments.

To keep the segments current, create a cron job that executes the following command at the desired interval:

```
php /path/to/mautic/app/console mautic:segments:update --env=prod
```

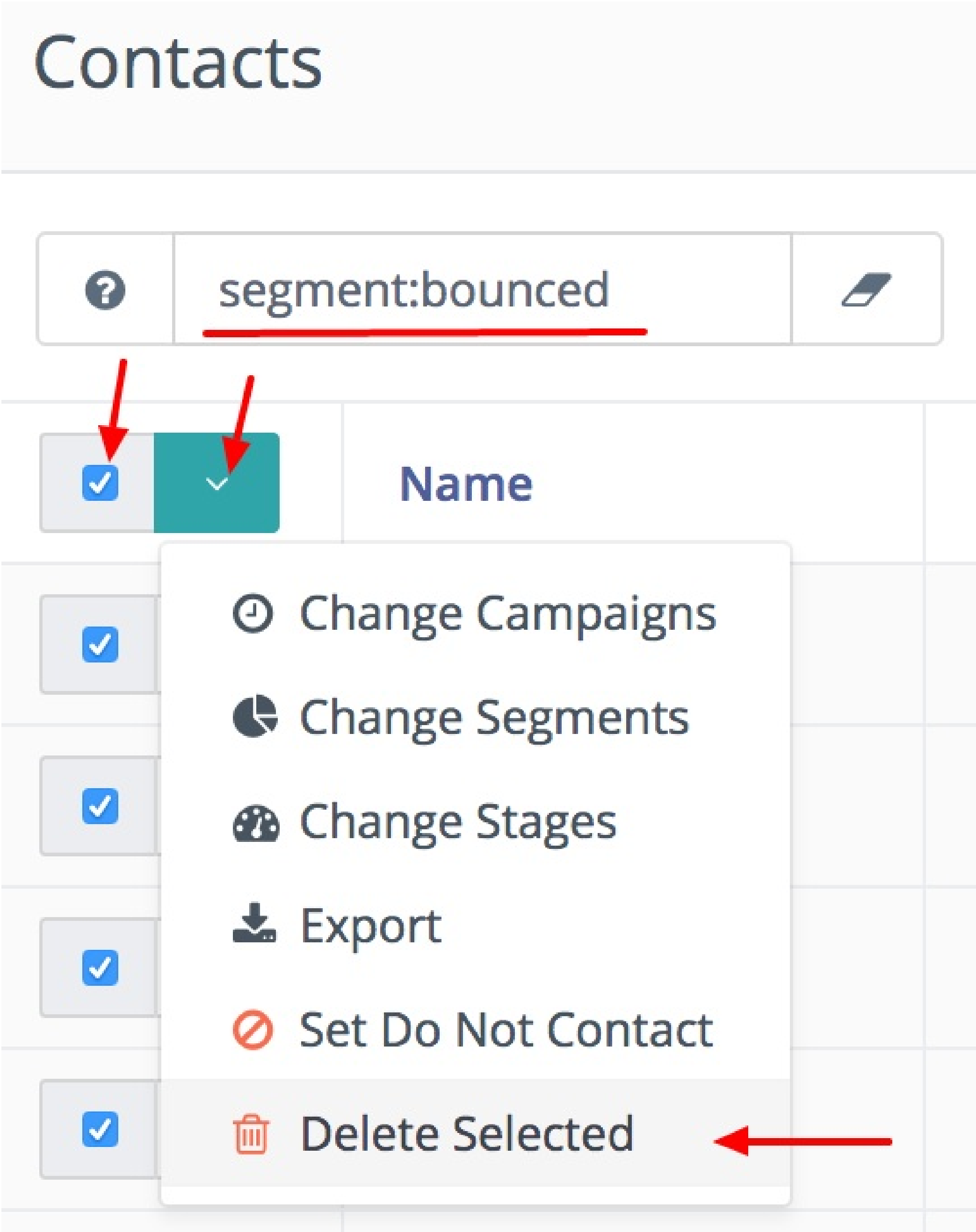
Through the execution of that command, contacts that match the filters will be added and contacts that no longer match will be removed. Any contacts that were manually added will remain part of the list regardless of filters.

Manual Addition

In addition to segments you can also manually add any contact to a list by clicking the Preferences button at the segments tab, use the dropdown to select a segment and add the contact to it or click on the x next to a segment in the input field to remove the contact.

Delete all contacts in a segment

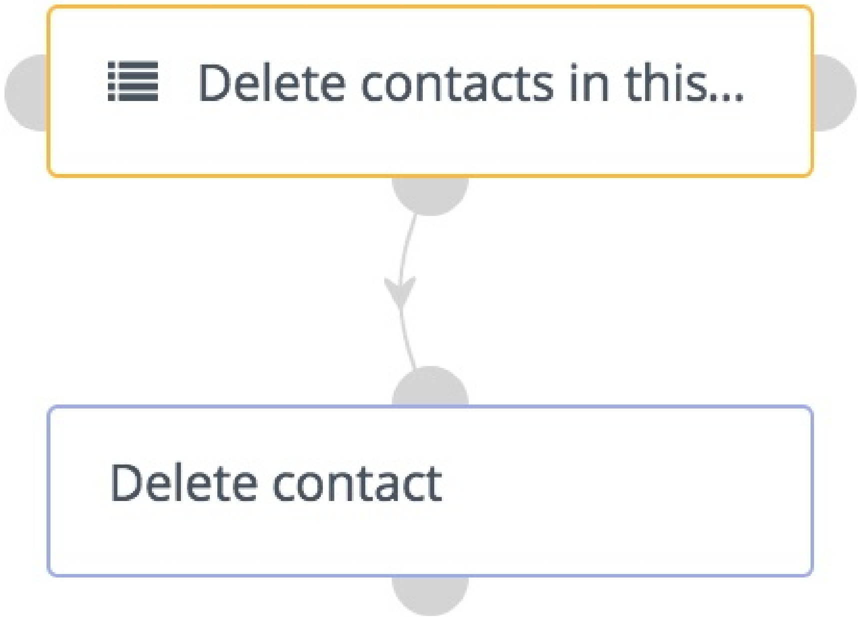
Filter the contacts in the segment. The batch delete action in the contact table allows deletion of up to 100 contacts at one time. This is a performance precaution since deleting more contacts at one time could cause issues. This feature can be used for hundreds of contacts.



But deleting thousands of contacts this way in one segment will become a tedious task. Luckily, there is a trick how to let the background workers do the job for you.

1. Create a simple campaign which has the segment as the source \
2. Use the Delete contact action.

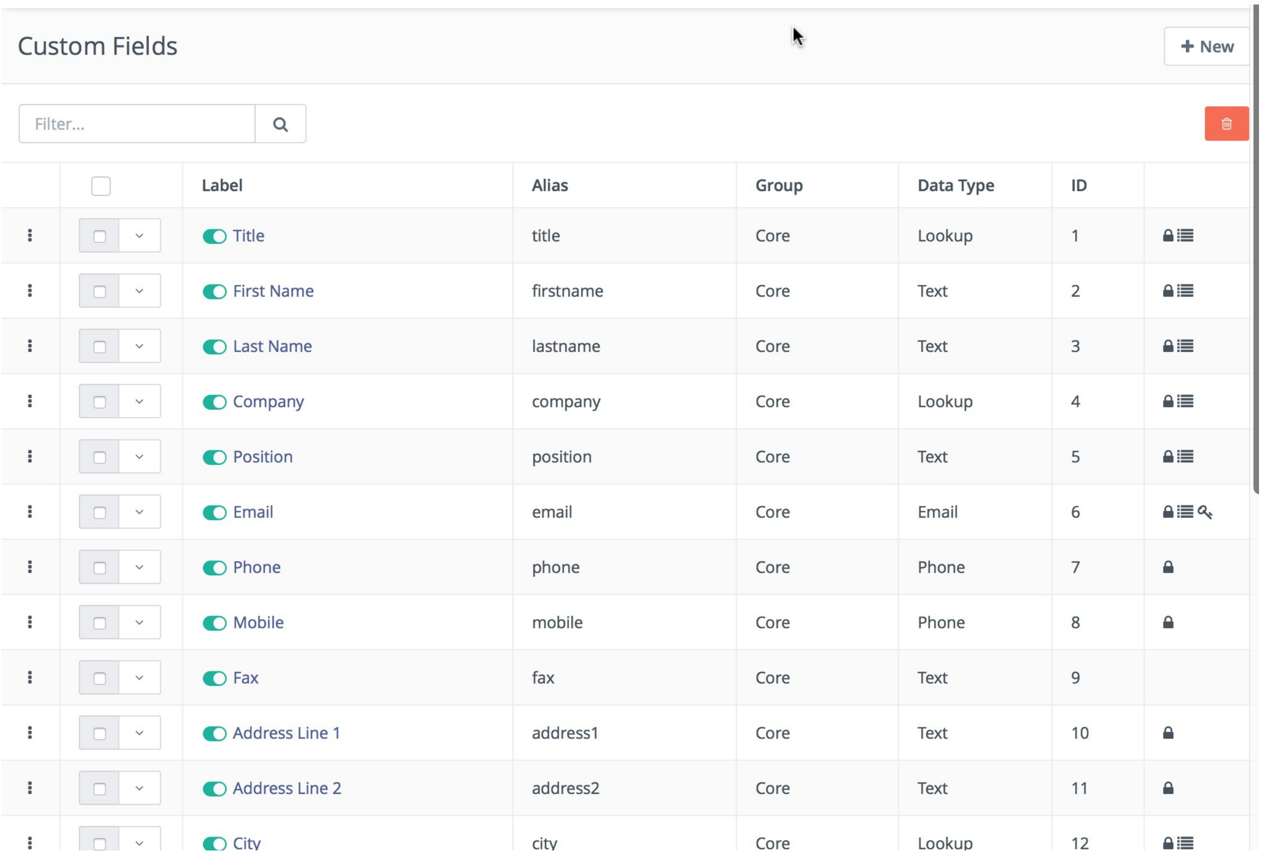
This way the `mautic:campaign:update` and `mautic:campaign:trigger` commands will delete all the contacts in the segment. As well as all the contacts which will be added to the segment in the future. Everything is done automatically in the background. The cron jobs must be configured. However, be aware that when a contact is deleted, there is no way to get it back.


Delete contacts in this...
Delete contact

Custom Fields

You can manage custom fields through the admin menu (click the cogwheel upper right hand side of Mautic).

The fields page will let you view all existing contact fields as well as any custom contact fields you've created.



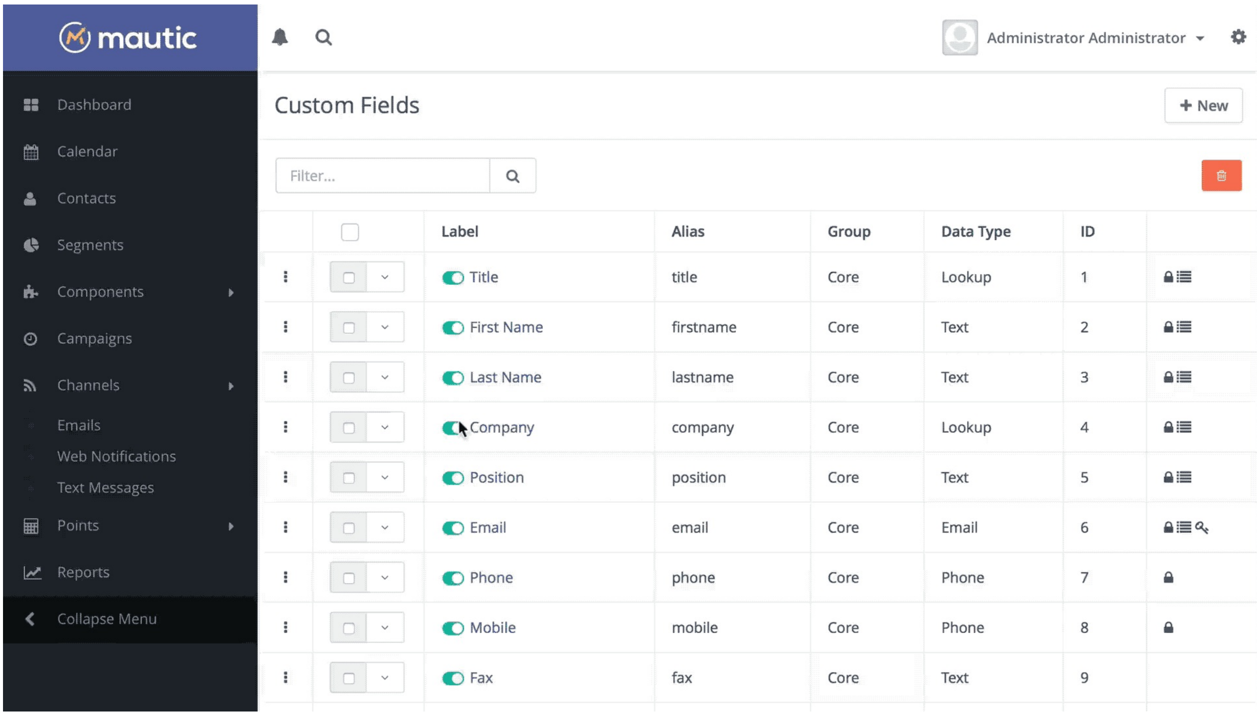
Label	Alias	Group	Data Type	ID
Title	title	Core	Lookup	1
First Name	firstname	Core	Text	2
Last Name	lastname	Core	Text	3
Company	company	Core	Lookup	4
Position	position	Core	Text	5
Email	email	Core	Email	6
Phone	phone	Core	Phone	7
Mobile	mobile	Core	Phone	8
Fax	fax	Core	Text	9
Address Line 1	address1	Core	Text	10
Address Line 2	address2	Core	Text	11
City	city	Core	Lookup	12

You will notice the group column which will show you where the specific field will be shown on the contact profile. 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
4. Globe icon - These fields are publicly updatable through the tracking pixel URL query (see Contact Monitoring for more details).

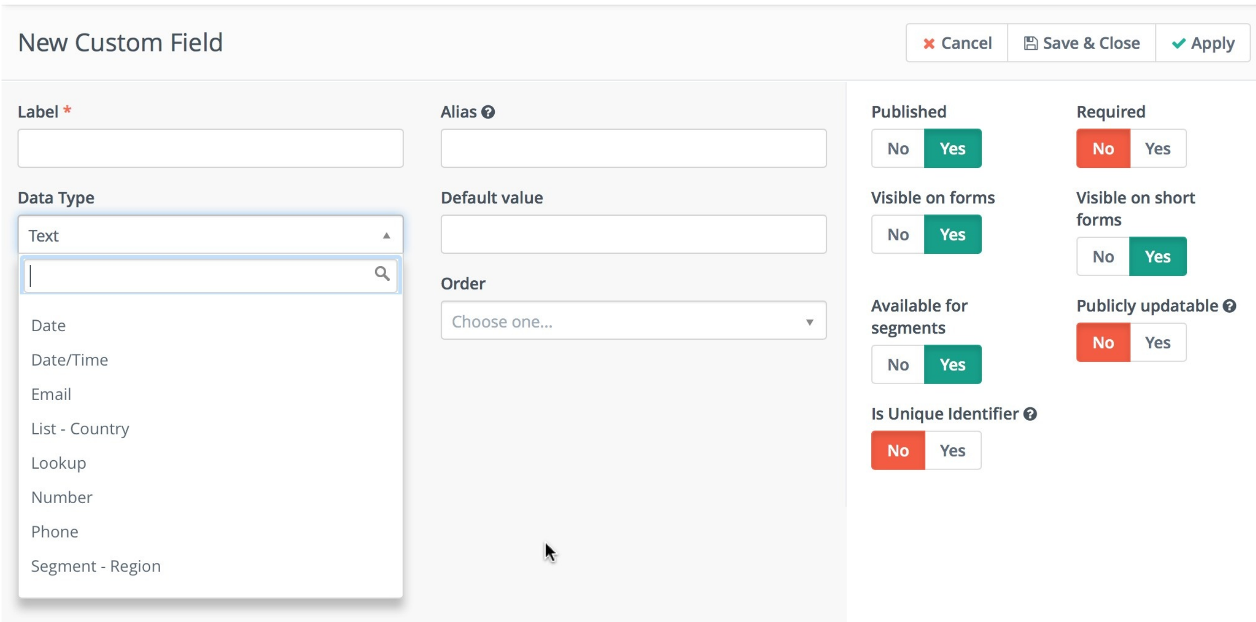
Published Fields

The check mark which shows before each label title is a clickable toggle which will publish and unpublish 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 will also select the group for that particular field. This will define where the field displays on the contact edit and detail view.



Contact Frequency Rules

Frequency rules are a set of rules used to define the number of times a contact should be contacted by any means in Mautic. At this stage Email and SMS have been implemented, but other forms of contact should also be applied as necessary. Such as social media mentions or messages sent in the future.

How to set frequency rules

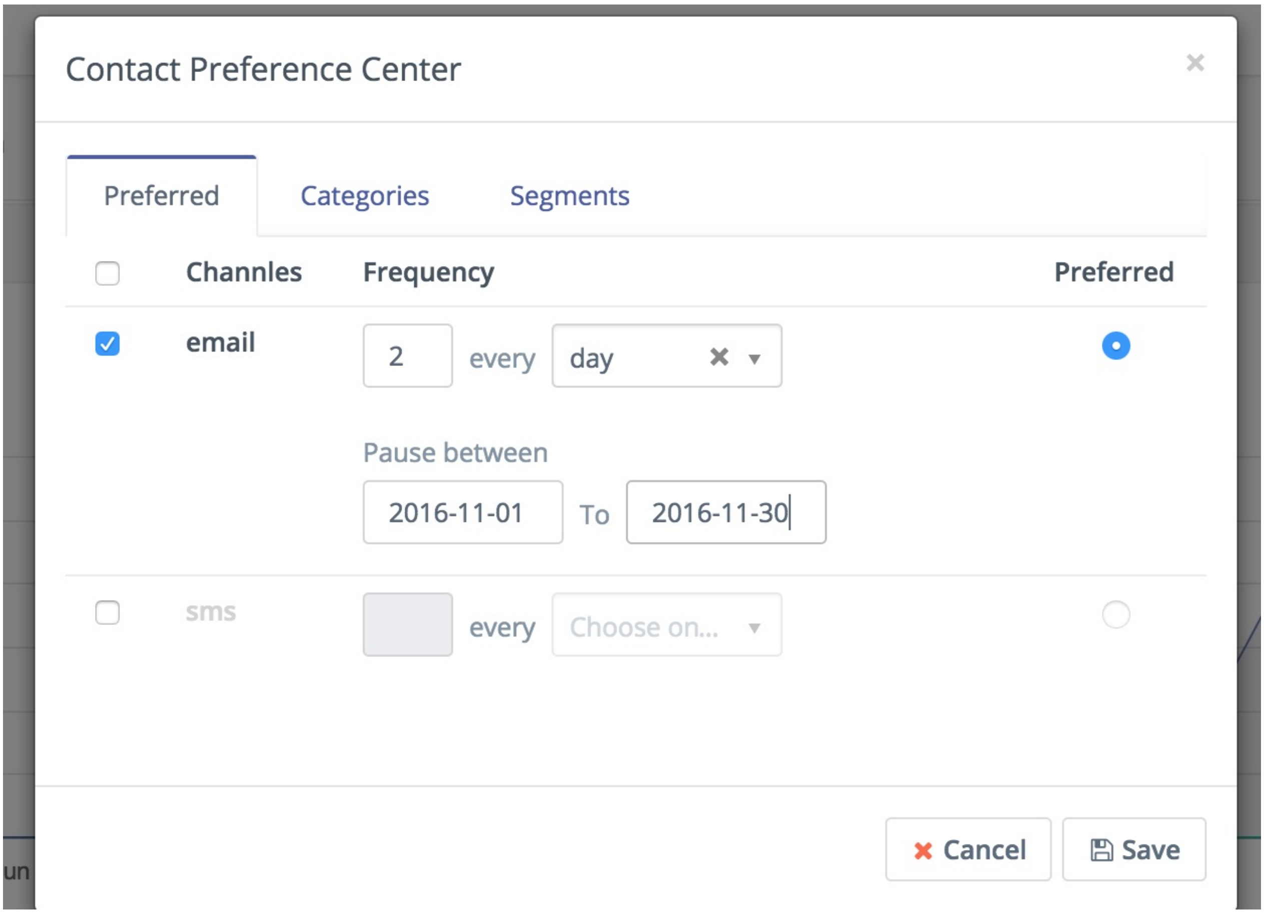
- Frequency rules can be set globally from the configuration panel on both the email and sms settings.

- Frequency rules can also be applied on a contact's detail page, from the dropdown menu on the upper right hand side. In this area you can select the channels where you want the rules to apply. Setting the rule here will override the general settings.

Manage Contact Preferences

When managing a contact you can set the contacts preference of communication. You can access the contact's preference center when viewing a contact's profile. From the dropdown menu click on the preference menu. A new modal window should appear with a tab to set the preferred channels and frequency of contact, as well as the option to pause communication within a given period of time. The second tab will give the option to add or remove the contact from global categories used in emails or categories. The third tab will allow to add or remove the contact from segments it belongs to.

Preferred Channels and Frequency

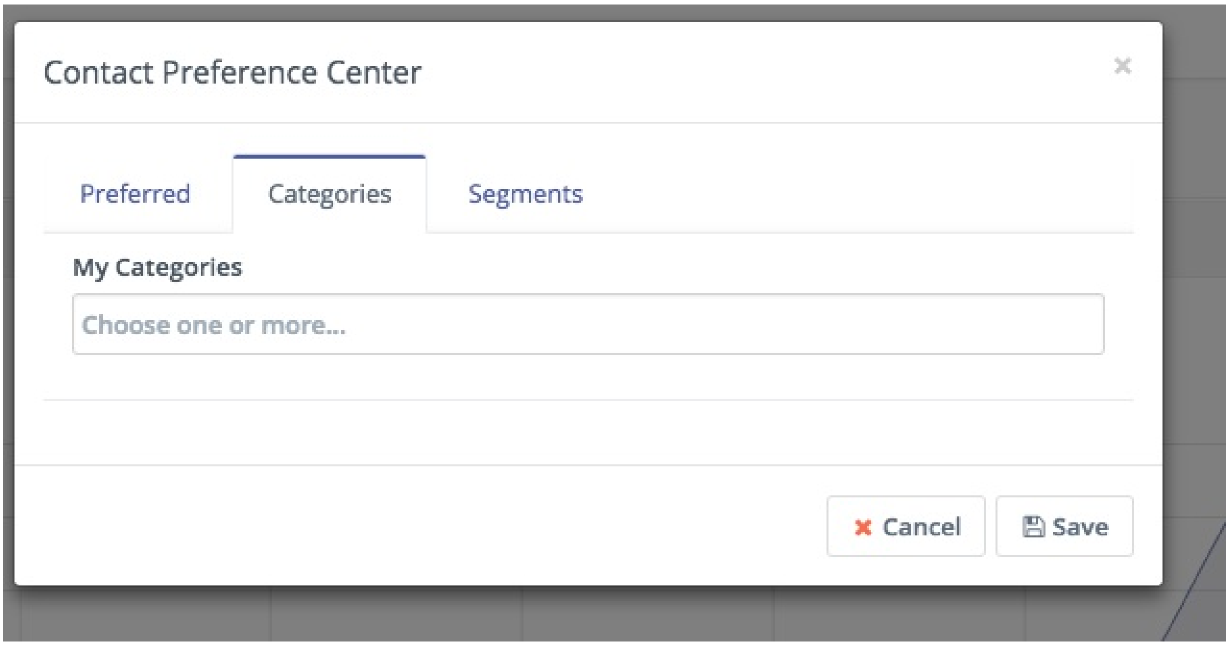


In this window you can enable/disable channels of communication, set the frequency of the communication via each channel enabled, and set one of the channels as a preferred channel.

To set a channel as a do not contact me through this channel, untick the tickbox next to the channel name in the first column.

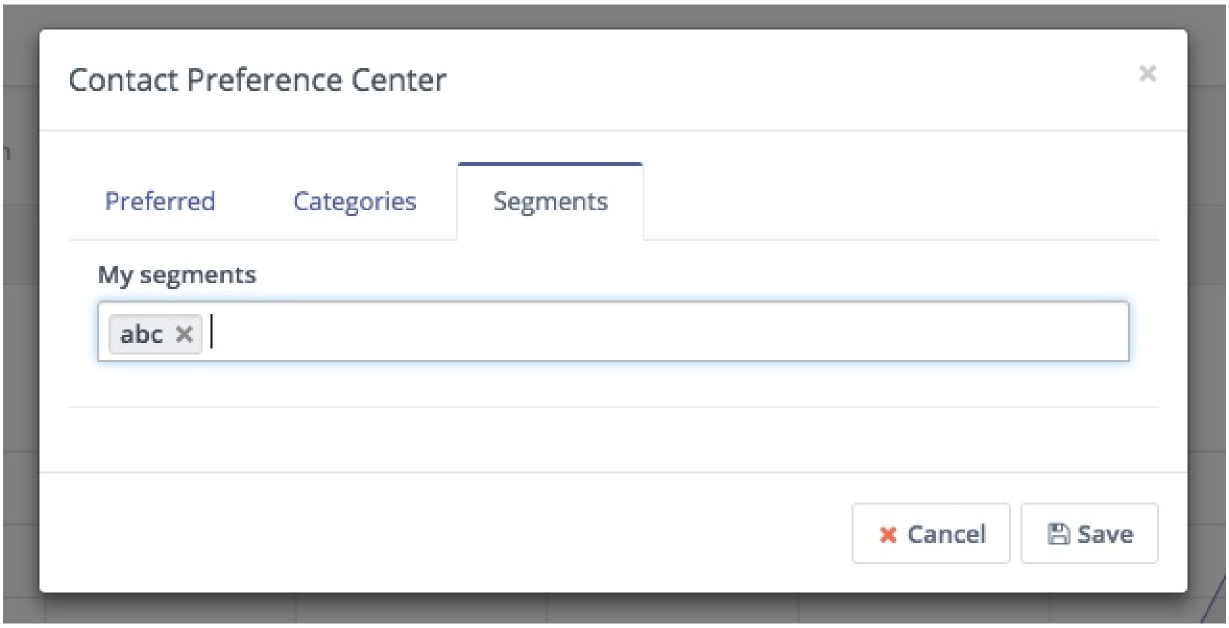
When a channel is selected, these will be used to send marketing messages if there is a message set for any of the channels selected. You can also set the frequency of the communication, as in this example the frequency is set to "Send me emails twice a day" but pause them during the "1st of november 2016 to the 30th of november 2016". Email is also set as the preferred channel, so if the same message is set for both email and sms, it will only send the email version of the message to the selected contact.

Contact Categories



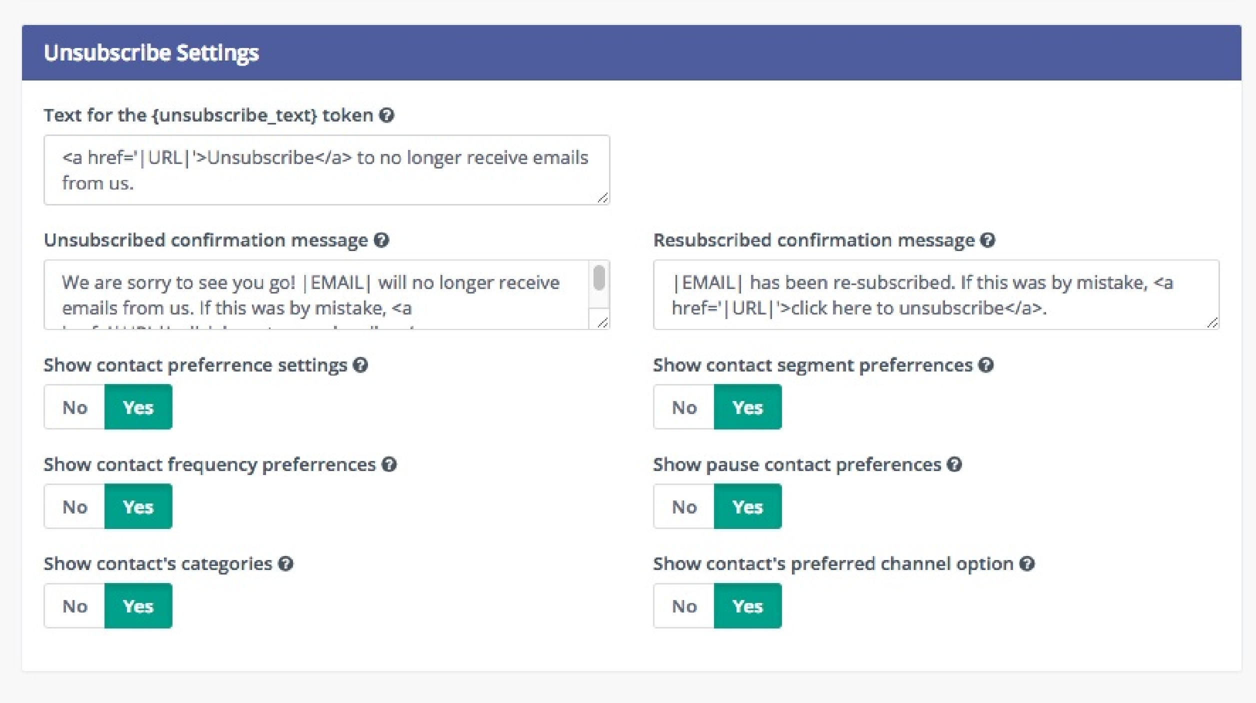
Use the categories tab to add or remove a contact from a global category. Global categories can be used in areas like emails, text messages, campaigns. In combination with the new Subscribed Categories segment filter, contacts can be given the choice to opt out of categorized communications.

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 be part of a campaign that has that segment as the source. You can also use 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.

Contact's Unsubscribe Email Preferences

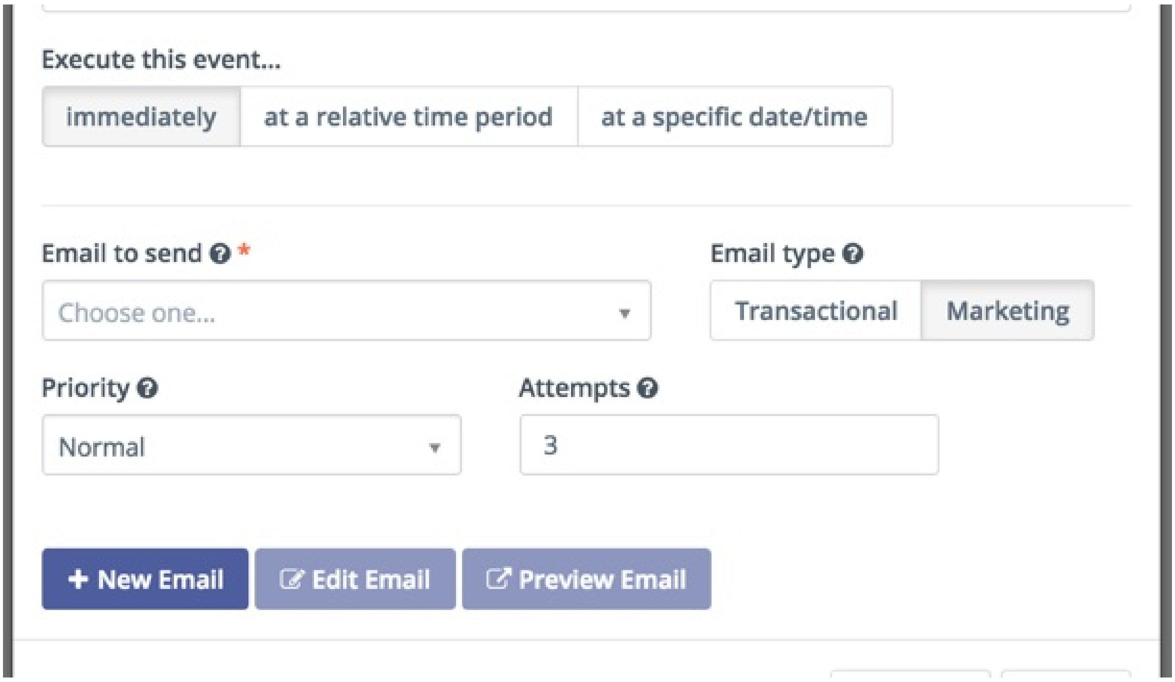


The contact's preferences can be presented to the user in the unsubscribe page by selecting "Show contact preference settings" in the email configuration. You may also choose to hide or show different segments of the user preferences. If any of these areas is set to no, it will hide it from the contact's personal preferences page. The default unsubscribe message is shown if the preference setting option is set to no.

Message Queues

When a campaign ***marketing*** email is triggered or an email broadcast (segment email) and either a contact has a frequency rule defined or there is a default set in Configuration, the email may be sent to a queue to be processed.

Priority and number of attempts



- You can select priority as High or Normal. All messages with priority high will be put in the front of the queue when processing messages for a given date. Broadcasts are always injected as normal priority.
- Number of attempts will try to send email again if it has been rescheduled, note that even if an email is pending but if the number of attempts has been reached, the message will not be sent.

Processing a message queue

Messages are put into the queue with status pending, so all pending messages that have not met their max number of attempts will be processed using this command.

Setup your cron as followed:

```
php app/console mautic:messages:send
```

Companies

Companies are a way to group contacts based on the company(ies) the contact works or has worked for.

Merging Companies

When editing a company, you can merge this company into another existing company by using the ***Merge*** button.

Search for the company you wish to merge into and the fields from the current company that are not populated in the selected company will be copied to the selected company. Contacts that are not in the selected company will also be transferred.

After the current company has been merged into the selected company, you will be redirected to the selected company and the old company will be deleted from the database.

Company Custom Fields

With Mautic's installation a set of custom fields is provided for companies, but you can customize these fields to your needs.

1. Go to custom fields and create any company field you need.
2. Go to the right select box to assign this field to 'Company'.

Company Segments

You can create a segment based on a company record, simply select any company field to filter with and the matching criteria for it, and contacts that match any company filtered will be added to the segment.

Identifying Companies

Companies are identified strictly through a matching criteria based on Company Name, City, Country (and/or State). If city of country are not delivered as identifying fields to identify a contact, a company will not be matched or created.

Campaign Company Actions

A contact can be added to a new company based on a campaign action

Create/Manage Companies

To create or manage companies, go to the companies menu identified by the building icon. In this area you can create, edit or delete companies.

Assigning Companies to Contacts

There are different ways to assign a company to a contact, all explained next:

Contact's Profile

You can assign a contact to companies in the contact's profile page when creating or editing an existing one. The latest company assigned will be treated as the primary company for the contact.

Contacts List View

You can batch assign companies to selected contacts in the contact's list view.

Through a Campaign

You can assign a company to identified contacts through a campaign by selecting the 'Assign contact to company' action.

When Identifying a Contact Through a Form

If a contact is identified through a form a company can also be identified/created if: -Company name is selected as a form field (mandatory for company matching/creation). -City is selected as a form field (mandatory for company matching/creation). -Country is selected as a form field (mandatory for company matching/creation). -State is selected as a form field (optional for company matching/creation).

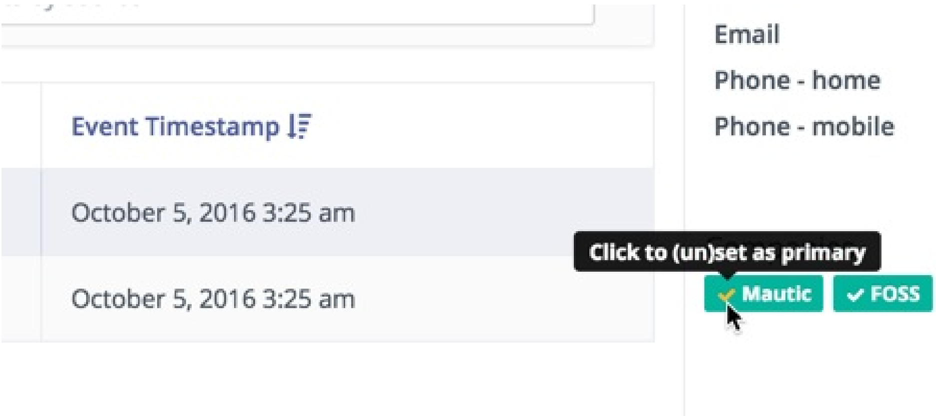
Company Scoring

A company's score can be changed through a campaign action or a form action. When one of these actions is selected, first a contact must be identified, and the companies assigned to that contact will have their score changed.

1. Select contact's *Change company score* action in either a form or a campaign
2. Once a form is submitted or a campaign is triggered it will identify companies identified in the campaign or form to change its score.

Setting Primary Company

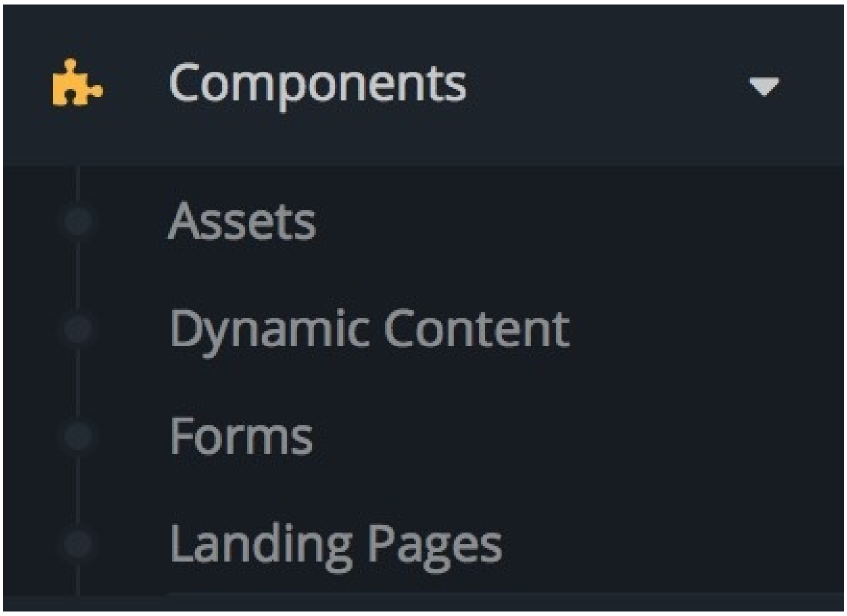
As of 2.3.0, it is now possible to set primary company through the contact details page.



The **Components** menu contains the following items:

- Assets
- Dynamic Web Content
- Forms
- Landing Pages

These items must be created before you can use them in a campaign.



Assets

Assets are those items which you will provide to your contacts typically upon completion of a form. These assets are trackable items and can carry their own point values, history, and tracking statistics.

Example Assets

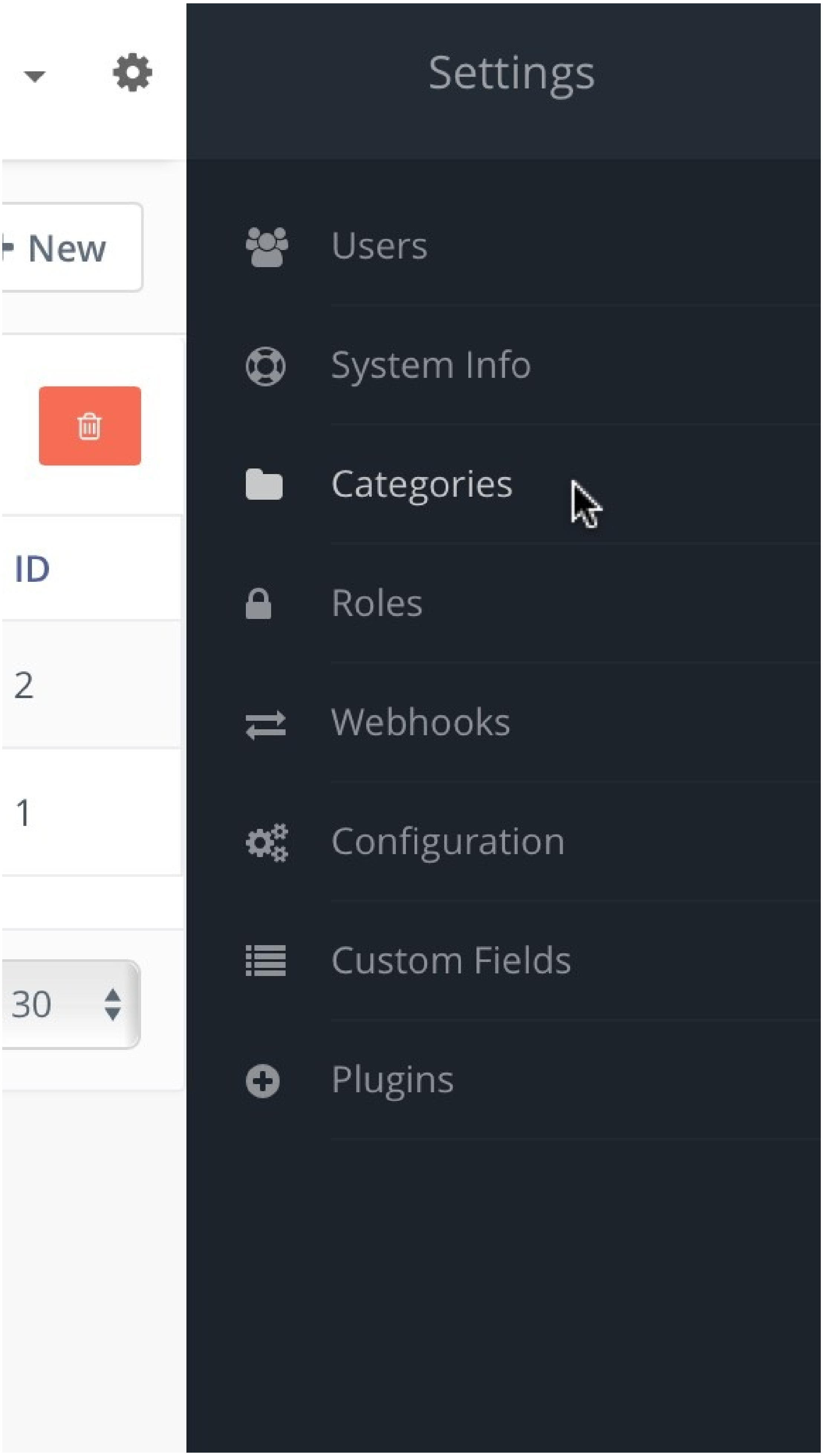
A few common examples of assets include:

- a white paper provided in regards a particular product or service
- a downloadable demo application or other digital product;
- any file of interest to the contact such as video, mp3, presentation, etc.

Manage Assets

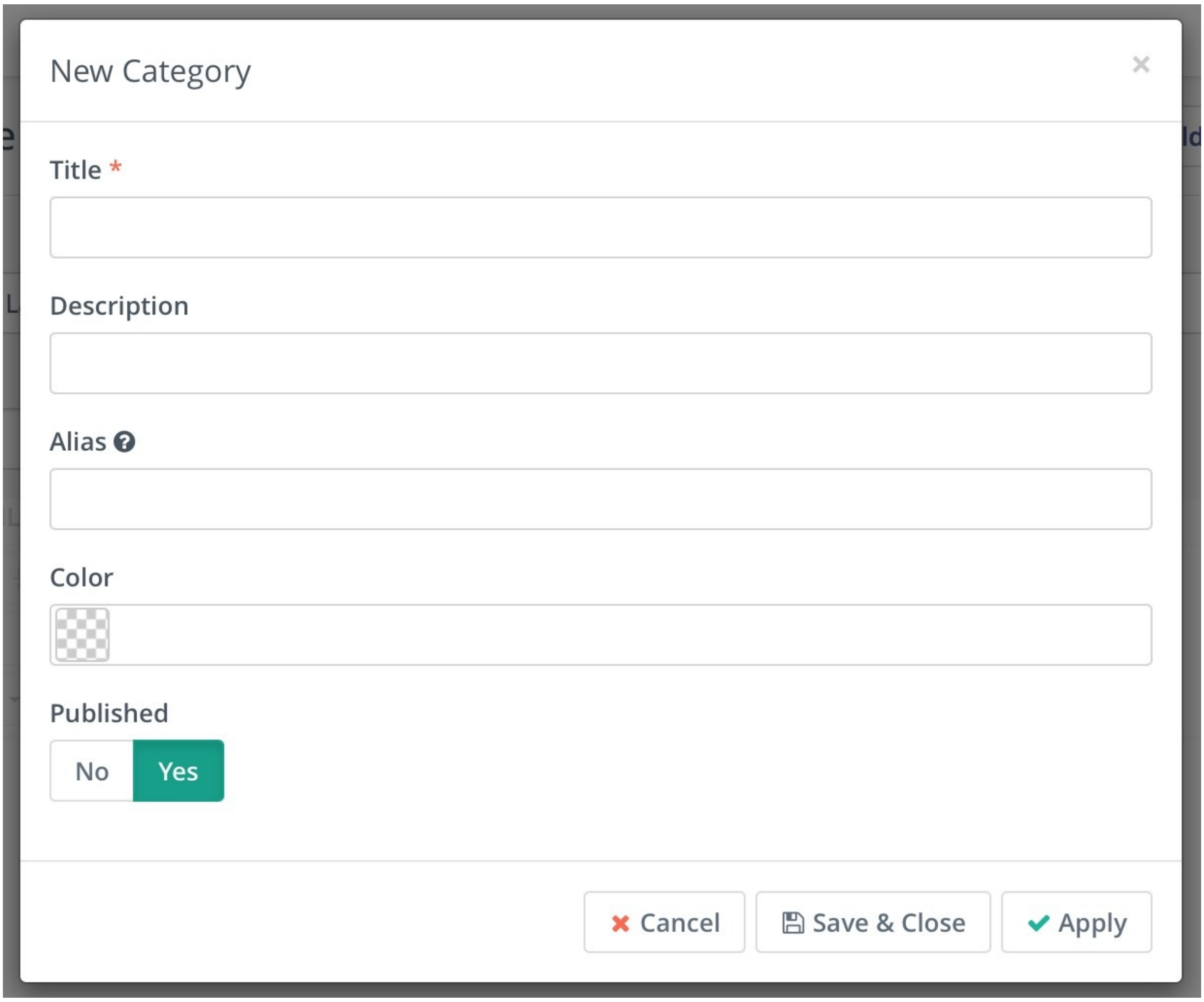
Categories

Assets can be organized in categories, which allows you to easily locate resources. To create a new category, browse to the Categories section in the admin menu.


New
ID
2
1
30
Settings
Users
System Info
Categories
Roles
Webhooks
Configuration
Custom Fields
Plugins

Creating categories

To create a new category, click on 'New' which can be found in the top right of the screen.



Name the category something that reflects the 'filing system' structure that will be used, and provide a short description of the category.

The alias field will be automatically populated from the title field unless manually specified. This creates the URL path so it should contain hyphens instead of spaces.

It is possible to color-code individual categories by either typing in a hex code, or using the picker to select the color.

To publish a category and make it available for assigning assets, 'yes' should be highlighted - if the category should not be published click on 'No' to set the category as unpublished.

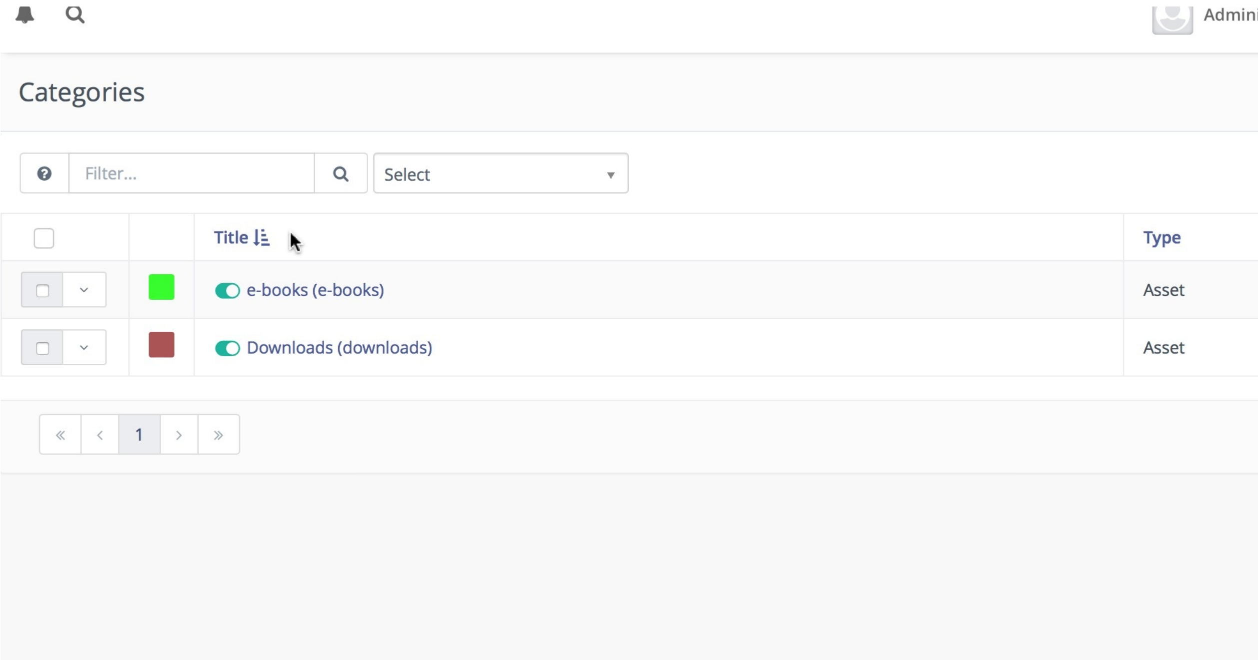
To save the changes and continue editing, press 'Apply'. To save the changes and go back to the categories screen, press 'Save & Close'. To cancel changes and return to the categories screen, press 'Cancel'

Editing categories

To edit a category, either click on the category name, or click on the arrow beside the checkbox and select 'edit'. The same screen as above will be displayed, however the fields which have previously been populated will already have content - which can be edited and saved as above.

Managing categories

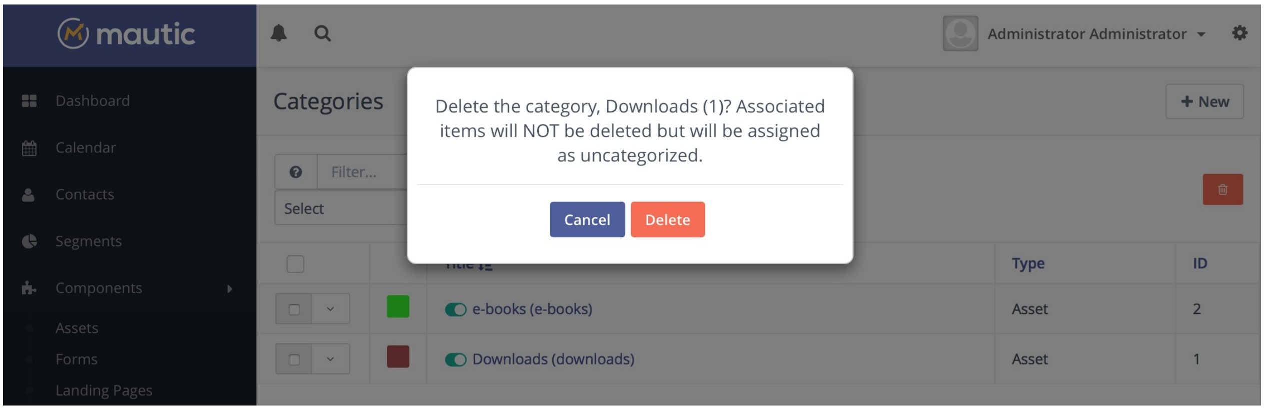
Categories can be sorted by title or ID. Click on the column header to search by the required field - clicking again will reverse the sort order.



At the bottom of the page, a dropdown allows control over the number of categories displayed per page - if this number is exceeded by the amount of categories, the pagination arrows can be used to move between pages. To change the number of categories displayed, select the desired number from the dropdown and the page will automatically refresh.

Deleting categories

Categories can be deleted by clicking on the arrow beside the checkbox and selecting delete. If any assets are currently assigned to the category being deleted, they will not be removed, but will instead display as 'Unassigned'. A warning will be displayed which alerts you to this fact when deleting a category.

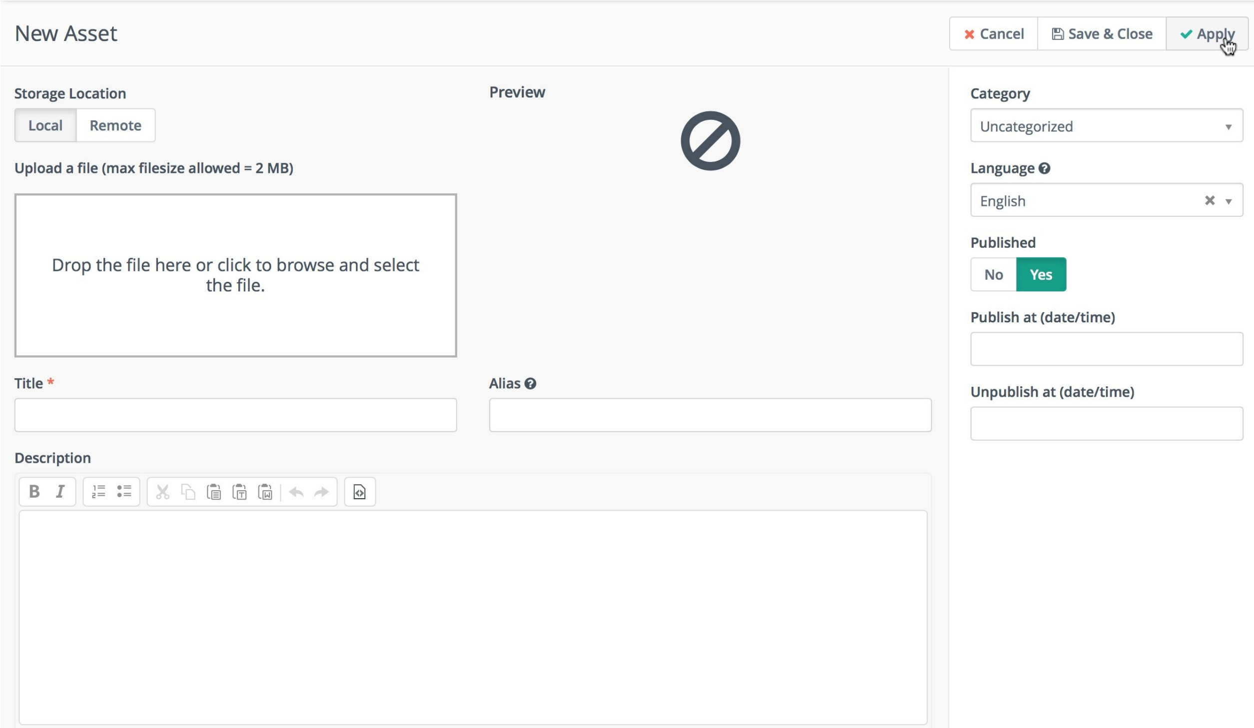


Assets

Assets are often provided as incentives to complete a form, and may include white papers, infographics, videos, mp3's and so forth. These are made available within Mautic as a downloadable file which may be instantly downloaded on submission of a form, or provided as a link from which it can be accessed.

Before creating an asset, first establish and publish any categories that may be needed. It is not possible to assign assets to unpublished categories.

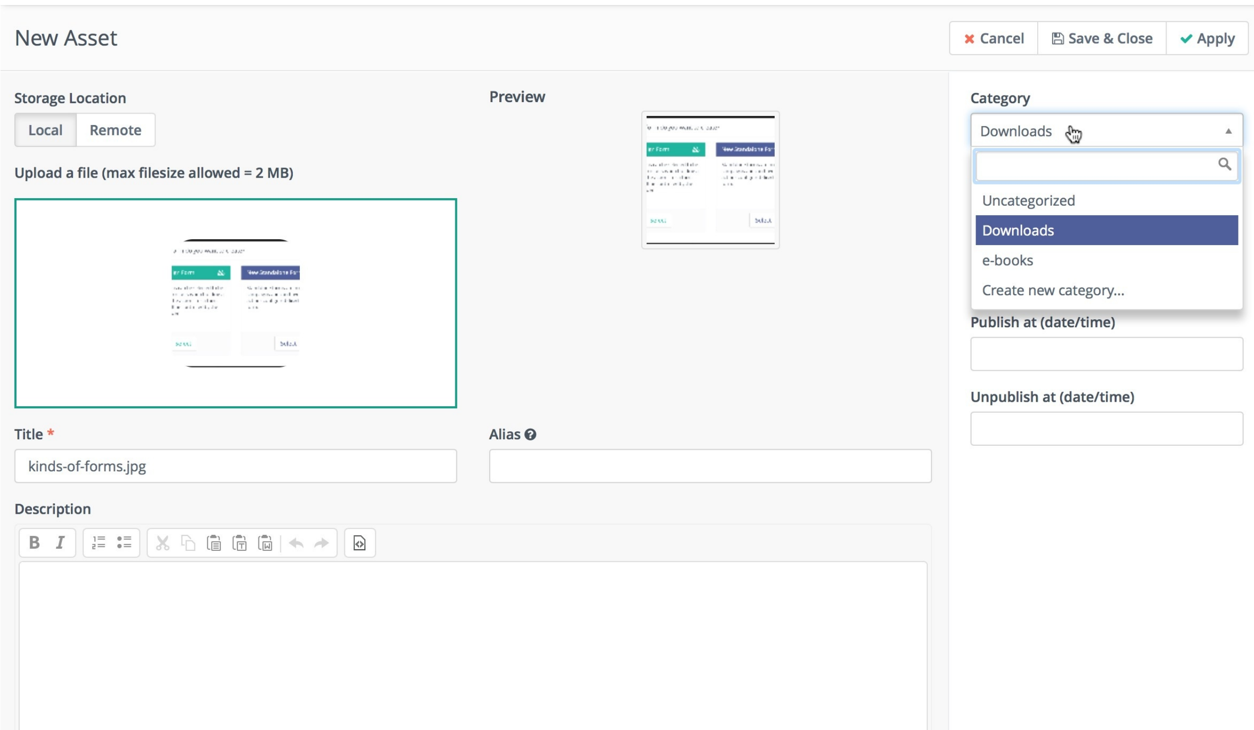
Navigate to 'Components' -> 'Assets', and click 'New' to begin creating an asset.



Assets can be added from local resources on a computer or from a remote location. Local uploads will be restricted by size due to the settings of your server - any such restriction may be advised as a warning above the file upload area.

Uploading an asset

To upload an asset, either drag the file into the white box, or click in the white box to open a file upload window. On selection of the file, it will be automatically uploaded and will appear in the white box.

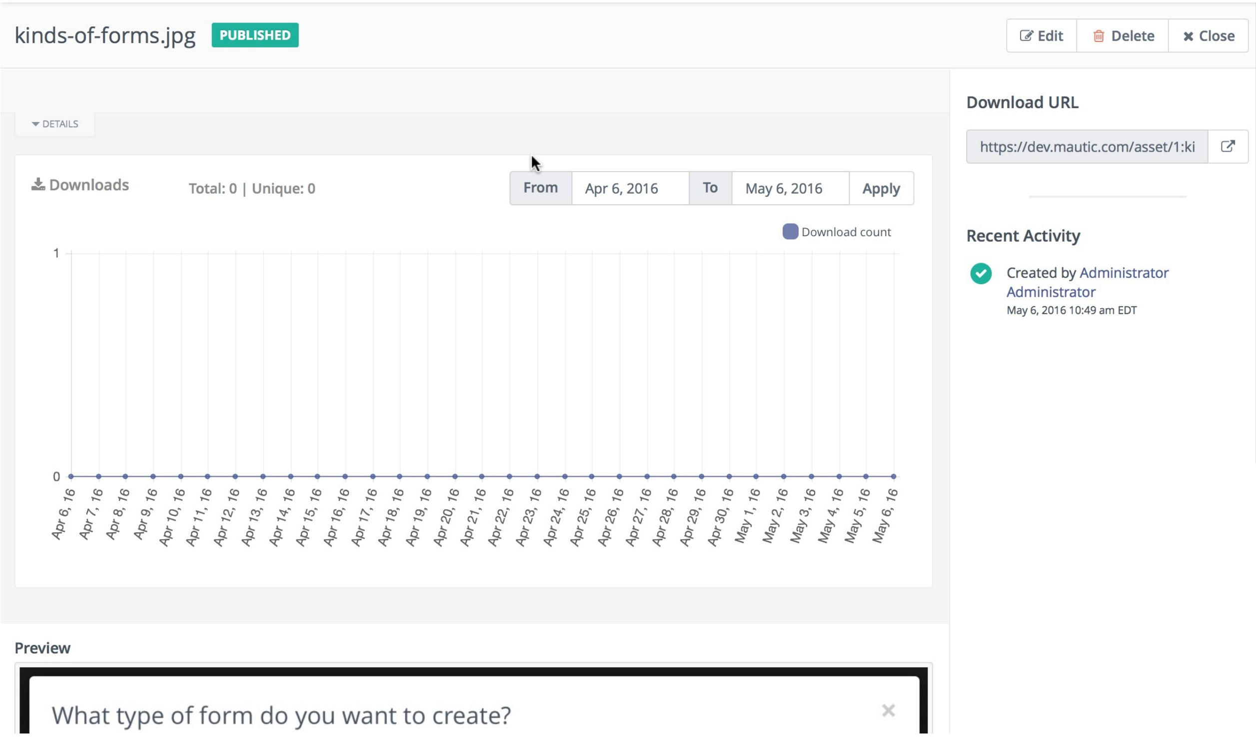


The title of the asset can be set, along with a description and an alias as above with categories. Assets can only be assigned to published categories, therefore the dropdown list for category selection will not feature unpublished categories. It is also possible to set the language, whether the asset is published or unpublished, and whether it should become published or unpublished at a specific date or time.

When the details have been completed, click 'Save & Close' or 'Apply' to save changes to the asset.

Viewing an asset

Once an asset has been uploaded and saved, it can be viewed by clicking on the asset name in the list of assets.



The view asset screen gives information about the number of times the asset has been downloaded, which can be displayed on a chart by hourly, daily, weekly, monthly or yearly downloads. The graph also shows the number of unique, versus total views - this is an indication of whether the same asset is being downloaded multiple times by some visitors.

A download URL allows previewing of the asset - clicking on the link will open the asset in a new window.

Below the preview link will be displayed recent activity for this resource, with a preview of the resource being available beneath the chart for some formats.

Editing an asset

An asset can be edited by clicking on the 'edit' button while viewing the asset, or by selecting the arrow next to the checkbox for the asset, and selecting 'edit'. The edit screens are the same as the view screens, however content will be populated in the fields.

Deleting an asset

An asset can be deleted by clicking on the 'delete' button while viewing the asset, or by selecting the arrow next to the checkbox for the asset, and selecting 'delete'. A confirmation screen will be displayed, prompting confirmation that the asset should be deleted.

Once an asset has been deleted, it cannot be retrieved, and statistics relating to the number of downloads for that asset will no longer be available. Contact points that may have been accumulated as a result of accessing the resource will remain. It is recommended where possible to un-publish assets which are no longer in use - in future there may be an archive feature.

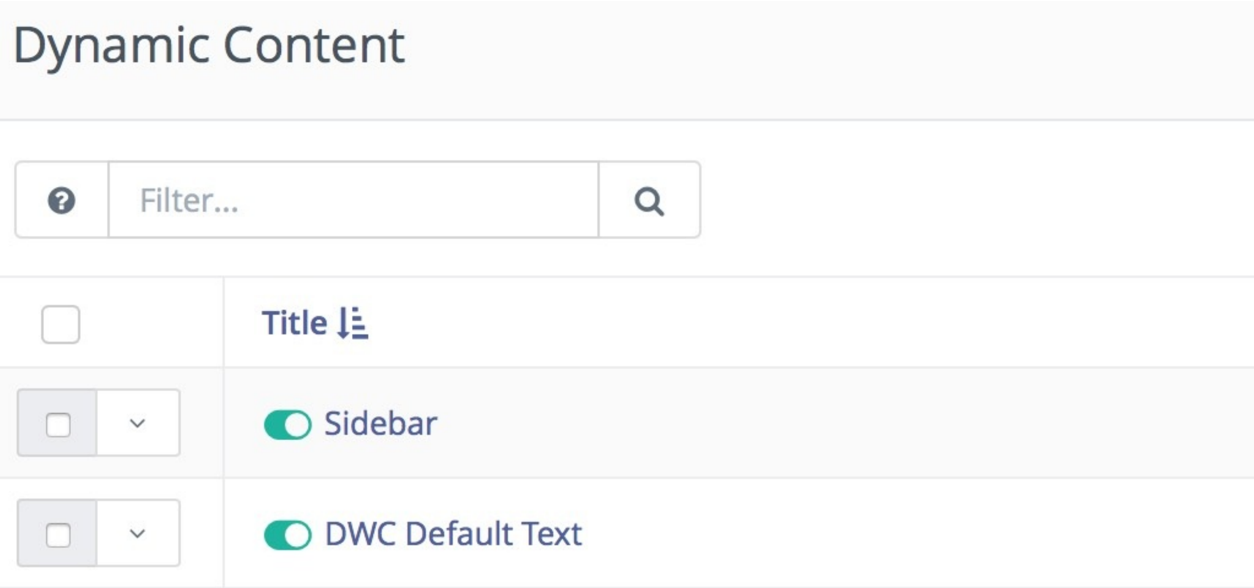
Dynamic Web Content

Mautic 2.0 introduced the ability to embed content on a web page dynamically for both anonymous visitors and known contacts.

There are several steps involved in setting this up.

Setup

Add the default content.

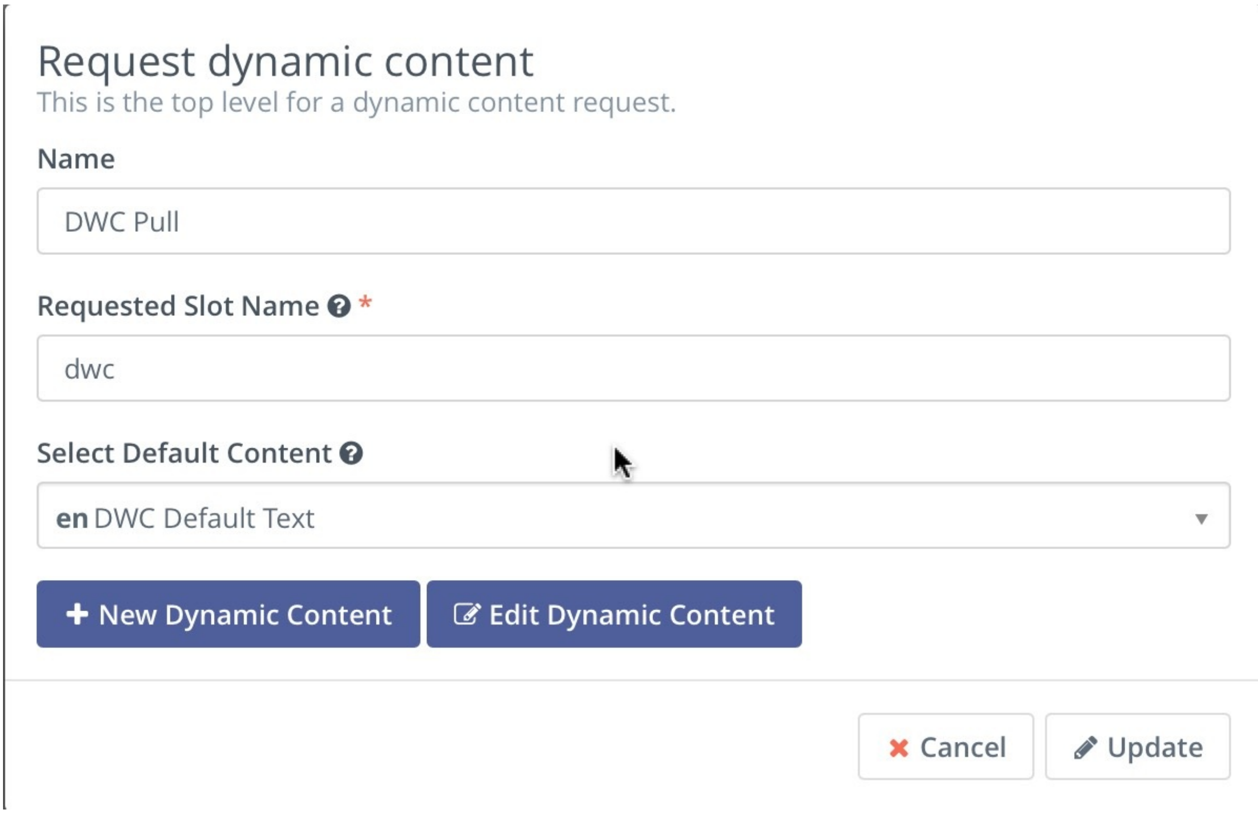


Add alternative content if desired.

You can set up as many items as you need. The default will be delivered via the "Request Dynamic Content" decision in a campaign. If you want to push something different based on a set of criteria, you create those here and deliver them via a "Push Dynamic Content" action.

Add the dynamic content pull request in a campaign.

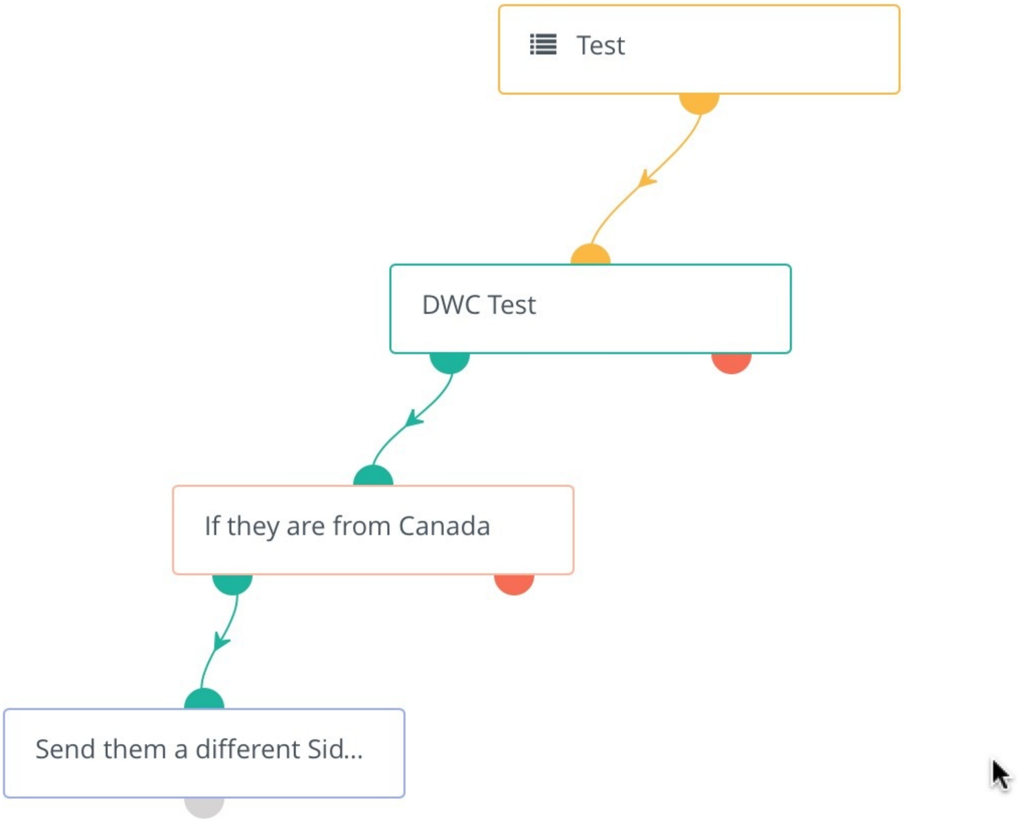
The key to this step is naming the "slot". This can be anything you want as long as it's unique across your dynamic content campaigns. The pull request is processed and determines if the person on the landing page is a known contact.



Add the push request in the campaign.

If you want to serve up different information based on certain criteria, you can use a push request.

1. If the person is known, they receive the content from the pull request.
2. If they meet the criteria (in the example below - if they are from Canada), a different set of content can be delivered to the browser.
3. If they are unknown, they will see the information embedded in the dynamic web content div from the page (see below).



Finally, include the dynamic web content shortcode in your web page.

```
<div class="mautic-slot" data-slot-name="dwc">Text in the html -
this shows up if the visitor is not known</div>
```

Note the data-slot-name matches the slot name in the campaign.

Watch a video tutorial: (https://www.youtube.com/watch?v=eChzJm5yBUk)

Translations

Dynamic web content supports translated content. When creating/editing a dynamic web content item, there are the options to set a language and select a translation parent. By selecting a translation parent, the current item is then considered to be a translation in the selected language of that parent item.

Tokens

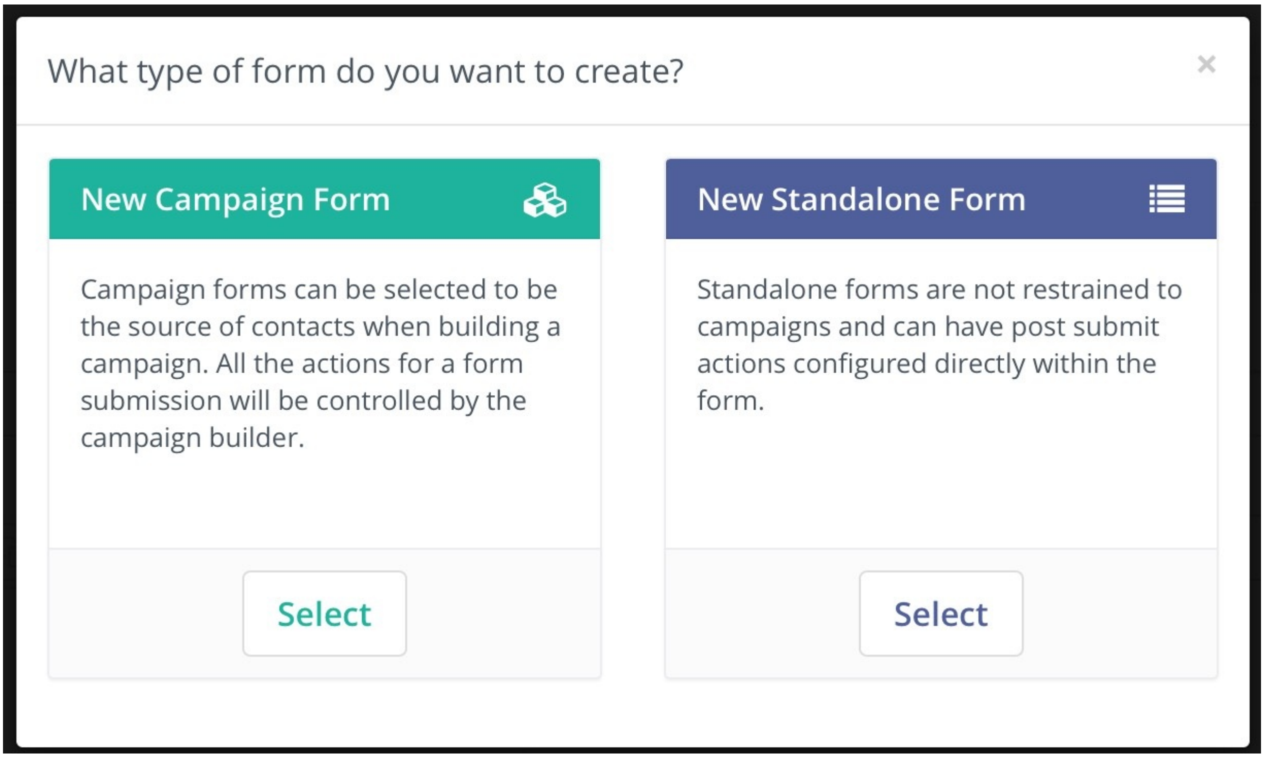
Dynamic web content supports these tokens:

- Contact Fields - example {contactfield=firstname}
- Page Link - example {pagelink=1}
- Asset Link - example {assetlink=1}
- Form - example {form=1}
- Focus Item - example {focus=1}

Forms

Forms are a special part of the marketing automation system. A form is used to collect user information often in exchange for providing access to a download, an event registration, or an email newsletter. Forms allow you to collect contact data and add additional information to their profile.

There are two kinds of forms in Mautic.



A **Campaign Form** can push a contact directly into a campaign but all actions are performed in the Campaign Builder.

A **Standalone Form** can push a contact into a segment, but not into a campaign directly. The advantage to this form type is that you can perform actions at the time of submission. An example of this would be sending an email to an administrator with the form values included.

Manage Forms

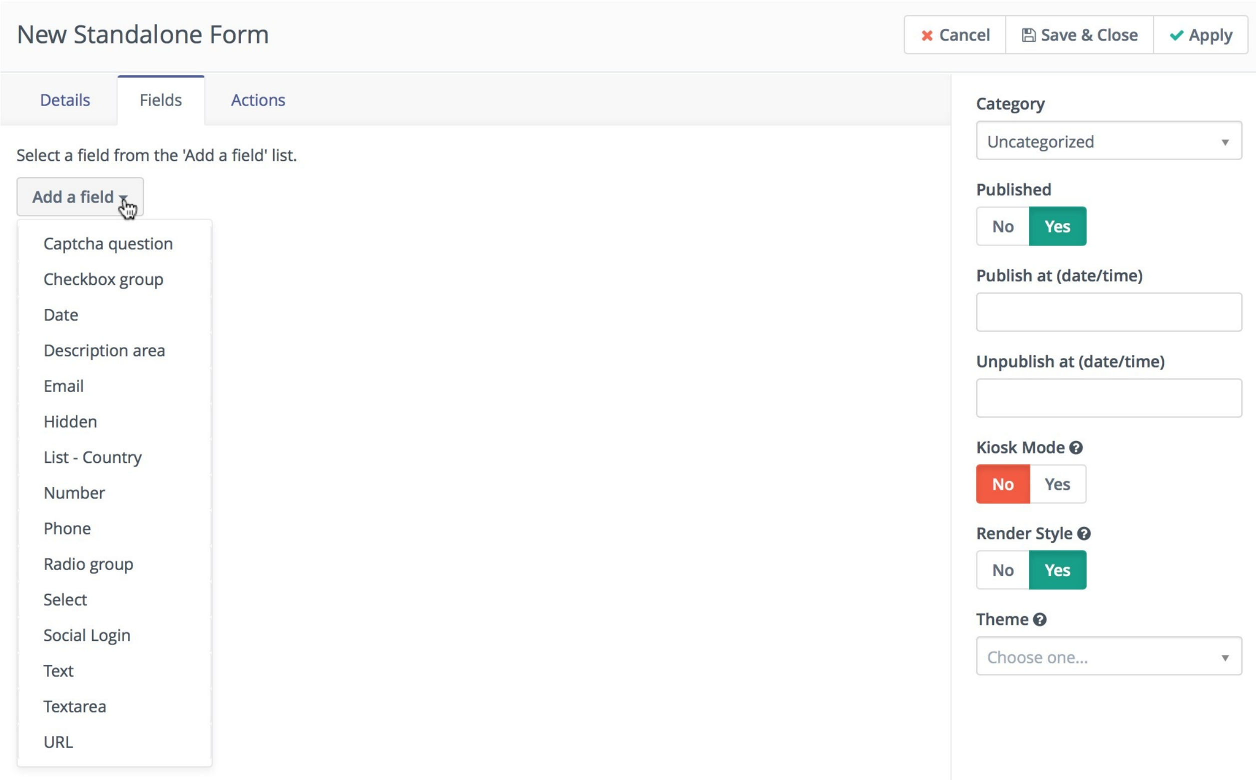
The new form view lets you create a form and attach any fields you want to collect from your users. After you've created the fields you can then define what actions you want to perform after the user submits the information.

Form Overview

The form overview provides a quick overview of the submissions received over a time period to easily analyze how successful a particular form is. The bottom of the form overview outlines the fields and actions included as part of a particular form.

Form Fields

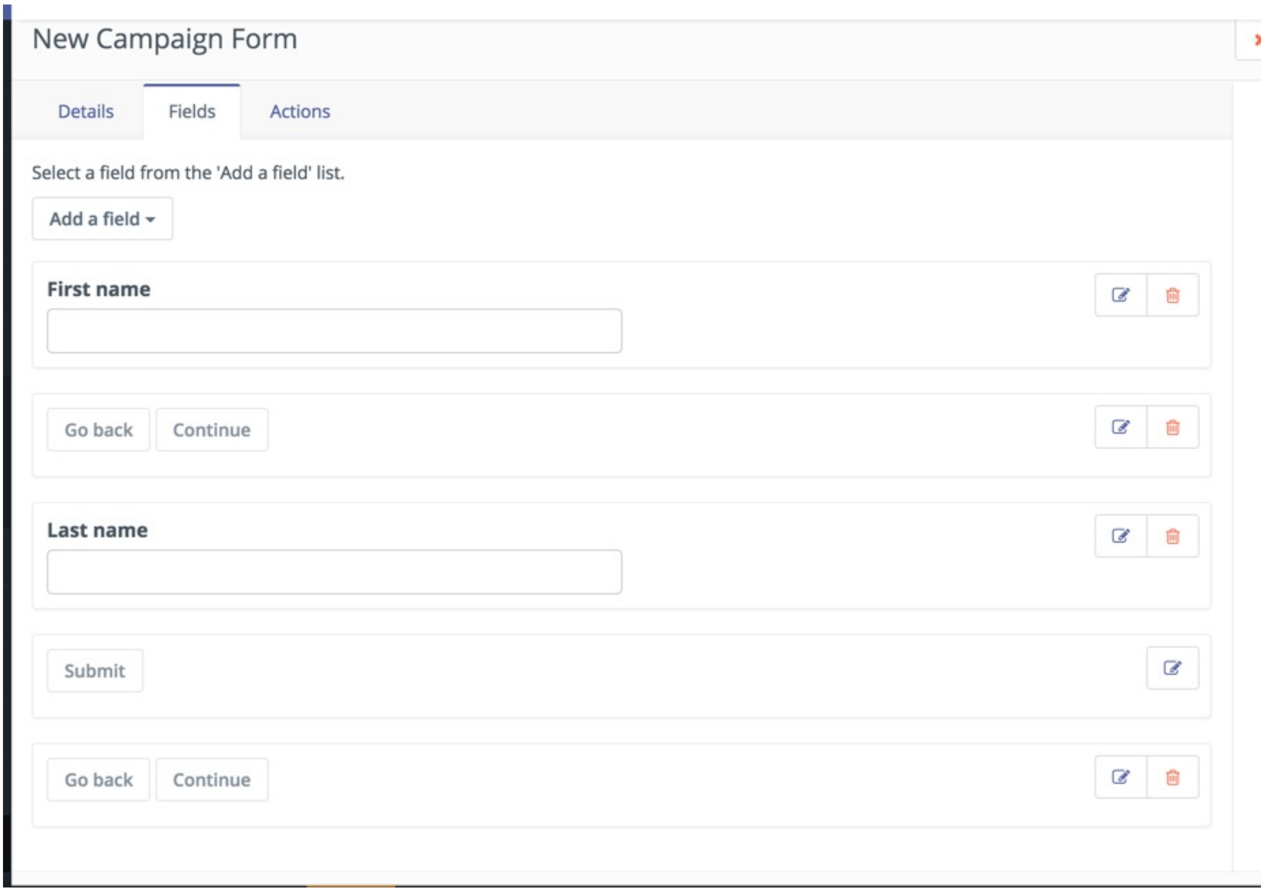
A form can contain as many fields as needed. These fields can be laid out dynamically by the system or handled via HTML if you want more control.



Page Breaks

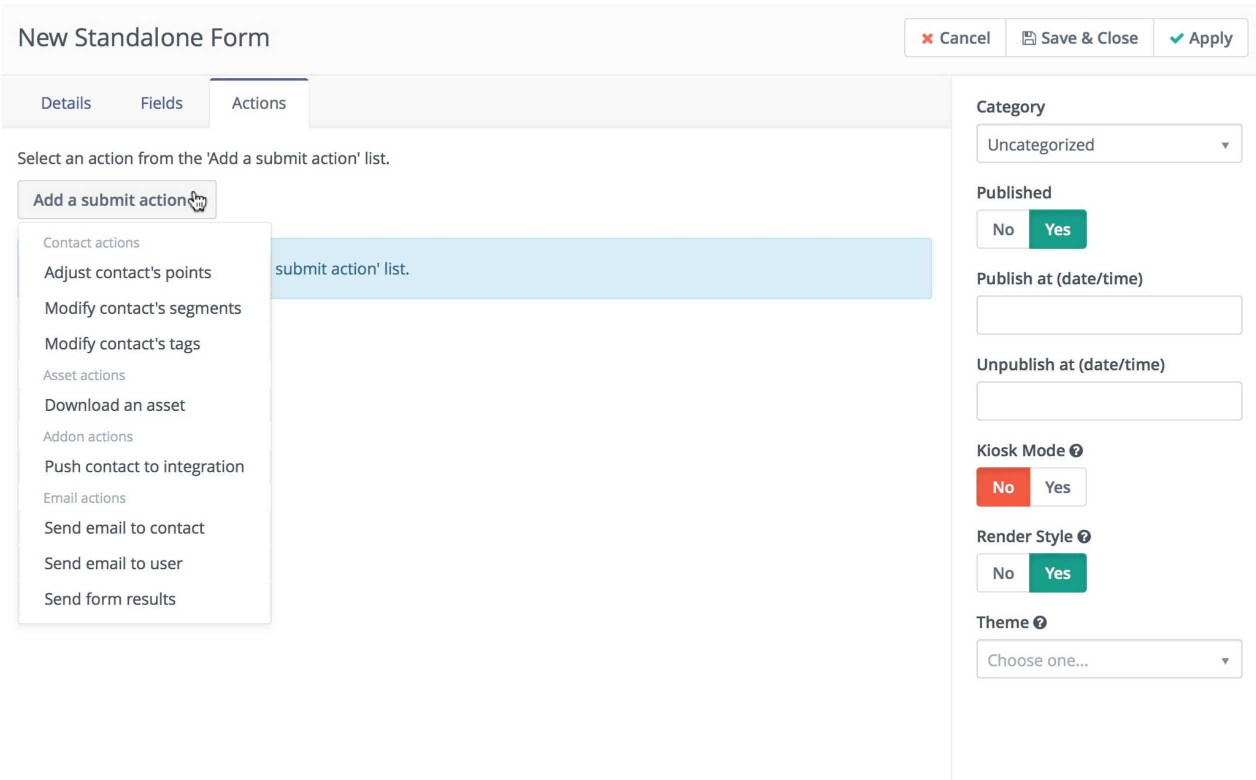
Page breaks is a new feature in 2.2.0 that allows multi-paged forms. Note that the submission does not happen till the final page and the submit button is pressed.

Each page break will add a customizable continue/back button that will navigate to the next or previous page. If a page break is added after the submit button, the continue button will be replaced with the submit button itself when the form is generated.



Form Actions

Form actions are items to be handled on the submission of the form. You can define multiple actions to be performed on each submission. As of 2.2.0, different actions are available based on form type.



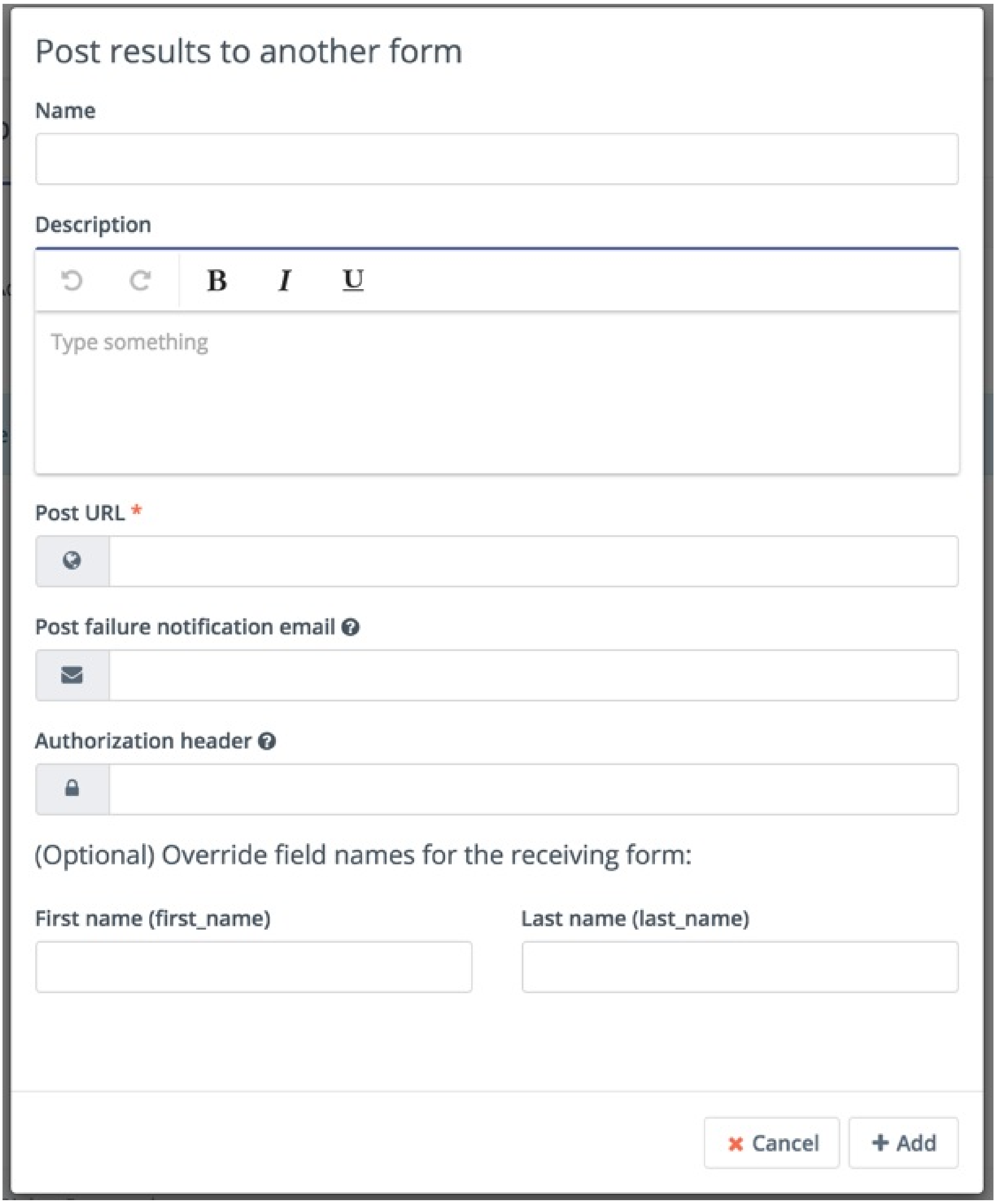
Form Re-Post Action

Results from a Mautic form can be re-posted to a 3rd party form using the new "Post results to another form" submit action.

An email can be configured to send the results if the form fails to forward.

Each form field can be have it's name customized to match that of the recipient form/script.

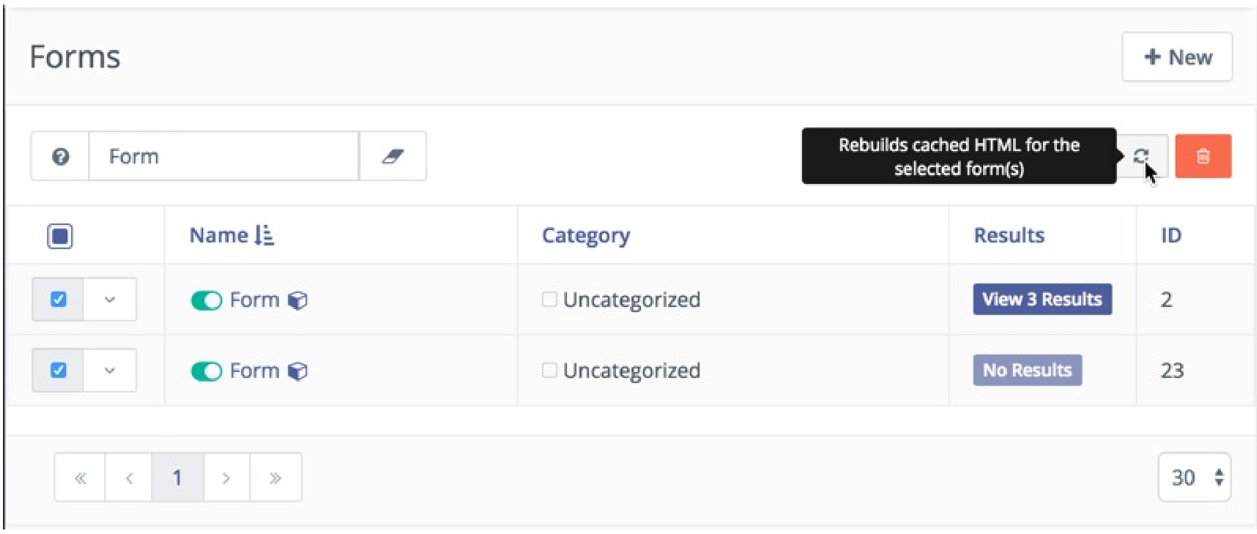
In addition to the form data, an array of `mautic_form` with details like ID, name, and the URL the form was submitted to (if available) along with `mautic_contact` with the details of the contact that submitted.



Creating and Updating Contacts with Forms

To have your form create or update contacts (in order to update, there must be a matching unique identifier). Each form field can be mapped to a custom contact field through the form's Contact Field tab. Some fields result in automatic matching such as email and country.

As of 2.2.0, for fields that include select lists (select, radio, checkboxes), options can be synced with the contact field itself. No more having to manually keep them in sync! If a custom field's list is updated, simply rebuild the form's HTML.



Kiosk mode

The kiosk mode is helpful when you know that some form will be submitted from one device by multiple contacts. For example like a kiosk at a conference. When the kiosk mode is turned on, each submission will create a new contact. When kiosk mode is turned off, Mautic will edit the contact which belongs to the current session.

Form Injection

There are three ways you can use the form. You can copy the entire output or you can have the form injected dynamically using the provided javascript. These are two options for directly including the form on a page, you can alternatively embed the form directly in a Mautic landing page if you choose.

It is recommended not to paste the injection code twice, it risks creating troubles on the submit form action when mandatory fields are submitted empty.

Form results

When on the form overview page you can click the Results button located in the top right to open a tabular view of all form submissions. These results can be easily filtered and sorted by each column heading.

Form Preview

The form preview provides a popup overview of what the form will look like. Remember that form styling is controlled by the surrounding page or website content and thus will display differently in final layout than in the preview.

Form Style

It is possible to choose a theme for a form. If you do so and the theme supports this feature, the form will be styled by CSS from that theme.

Pre-populate a form field value

It is possible to pre-populate the value of a form field from the URL query parameters.

The contact field's alias can be obtained from the table when viewing Contacts -> Manage Fields. The form field's name is stored as the alias in the database and is auto generated from the field's label; you may have to look at the source of your form to get the exact name (open the form and click the preview button). For example, here is a sample html section taken from a form. The name to use is what's within `mauticform[FIELDNAME]`.

```
<div class="mauticform-row mauticform-email mauticform-row-email" id="mauticform_email">
    <label id="mauticform_label_email" for="mauticform_input_email" class="mauticform-label" "="">Email</label>
    <input id="mauticform_input_email" name="mauticform[email]" value="" class="mauticform-input" type="email">
</div>
```

Pre-populate the values automatically in an email

Embed the tokens {leadfield=FIELDALIAS|true}, one for each contact specific information you want to pre-populate the form with, into the URL, assigning them to the name of your form field.The |true tells Mautic to URL encode the value so that it works in the browser.

```
{pagelink=1}&email={leadfield=email|true}
```

In the rendered email sent to a contact, the URL may be converted into something like:

```
http://my-mautic.com/my-landing-page?ct=A_REALLY_LONG_STRING&email=contactemail%40gmail.com
```

So, what happened is `{pagelink=1}` was converted into the landing page URL and had `?ct=A_REALLY_LONG_STRING` appended. The really long string is encoded information about the contact which includes the contact ID. Each `{leadfield=FIELDALIAS}` was replaced with the contact's data. When the contact clicks the link, they will be taken to the landing page with the embedded form, and the form's 'email' input will be pre-populated with the value passed through the URL.

Remove Contact from Do Not Contact (undo unsubscribe)

Mautic 2.3 added new action **Remove Contact from Do Not Contact**. If a contact unsubscribes from your email marketing, you can't send another emails. Use action **Remove Contact from Do Not Contact** in your forms and the contact will receive email again.

Progressive Profiling

This feature was added in Mautic 2.1.0.

Progressive profiling makes your forms smarter by asking for the most important information that you don't have yet. This way your contacts won't feel overwhelmed by long forms and saves time by answering questions Mautic already knows the answer to. Progressive Profiling lets you improve the form conversion rate.

Configuration

There are 2 possible ways that you can configure a form field to display only when needed. The configuration is in the **Behavior** tab in the field configuration form. The Behavior (Progressive Profiling) can be configured for all field types except the *email* and the *button* field. Email must be always visible because it is the identifier of a contact and Mautic's tracking is not yet 100% accurate. The button field must be always visible because otherwise the form couldn't be submitted.

It's recommended to use the email field in each form.

1. Display field only if the value is not known yet

Mautic will search for a value in 2 places before the form is rendered for the current contact:

1.1 Former form submissions

Mautic will search for the field value in the former form submissions of the current contact. If a value is found, the field might be hidden if configured so. There are limitations of the search history. Read about them below.

1.2 Contact profile values

If the form field is linked with a contact field, Mautic will check if there is a value in the contact's profile and hides the field if configured so.

2. Display field only after X submissions.

If you want to ask a contact additional questions on the second form load, you can specify so for each lead. It works nicely with hiding fields which you already know the answer to. For the first submission, the contact can be asked to fill in the First and the Last name. When she comes the second time, the First and the Last name fields will be hidden and instead she'll be asked to fill in her Company and Phone.

Limits of Progressive Profiling

The search history limit

The Mautic forms without progressive profiling are as fast as it can be. The HTML of the form is rendered once, stored and this "cached" HTML is used for the next form loads. When a progressive profiling configuration is turned on on any of the form fields, the form HTML might be different for each contact. It can even change for each contact after each submission. That's why the caching technique cannot be used anymore and the form load time will be slower for a progressive profiling form.

There is limit of 200 submissions from which Mautic searches for existing form values. This limit was added to prevent possible slow form loads or even hitting the server time or memory limits when a contact has several thousands of form submissions. This limit might cause Mautic to display/hide the wrong fields.

The embed type limit

Progressive Profiling forms will not work if you embed your form as static HTML. It will work at form preview, form public page, form embedded via JS, form embedded via iframe.

The kiosk mode limit

Progressive Profiling features are turned off if you switch the form to the Kiosk Mode. The form always creates a new contact on each submission in the Kiosk Mode. It doesn't track the device from which the form was submitted.

The Progressive Profiling options under the Behavior tab will still be accessible in the Form Builder so you could easily switch the Kiosk mode off and use the Progressive Profiling features again.

Gated Video

This new inbound channel was added in Mautic 2.1. It allows Mautic users to embed gated videos in their websites, landing pages, and anywhere else the mautic tracking javascript is installed. In Mautic, a gated video is one that plays for a set amount of time then pauses the video in order to show a form that, when submitted, will capture the lead information then continue to play the video from where it was paused.

Using Gated Video

Gated videos are not an entity within Mautic; they do not have a menu item. Gated videos can be embedded in your landing page content or in your website that has the Mautic tracking javascript installed.

jQuery and Vimeo's Froogaloop javascript libraries are required for this feature to function. They will be automatically inserted into your landing page if videos are detected.

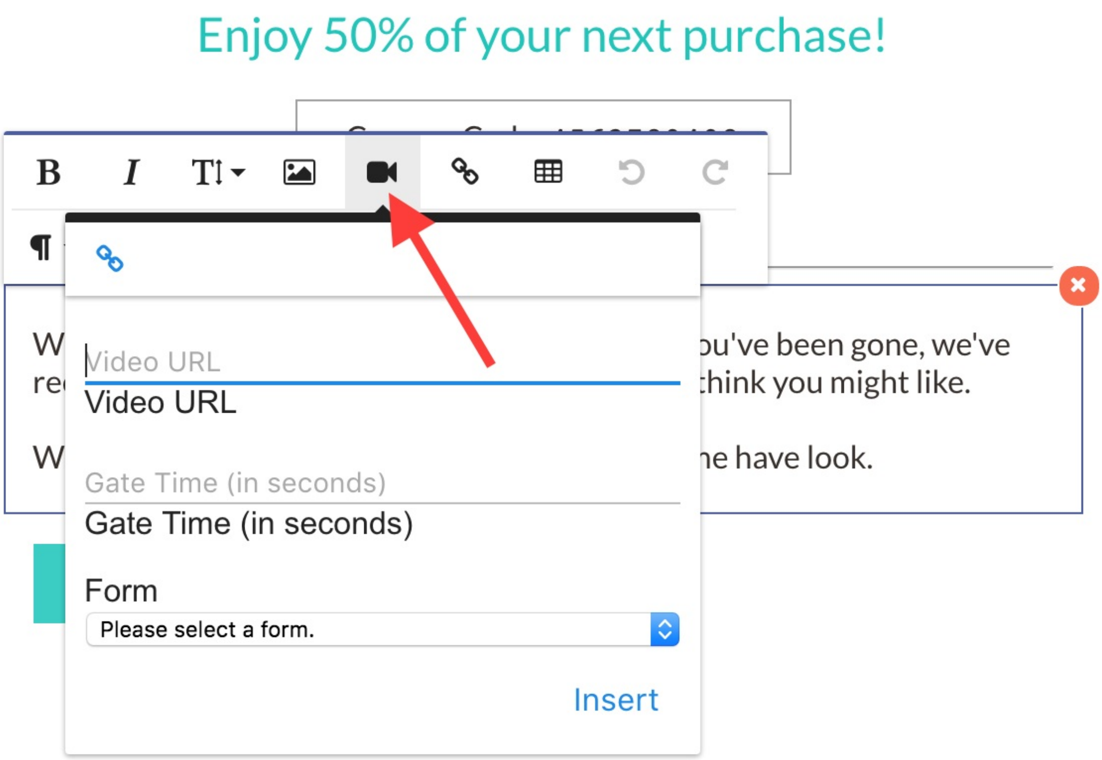
Any `<video>` tag found by the javascript that has a `data-form-id` and `data-gate-time` attribute will be treated as a gated video by the Mautic javascript. The simplest way to embed a gated video is to embed the HTML below on a page where the Mautic tracking javascript is installed.

Keep in mind that you should replace the form id with a valid form id from your Mautic installation and that gate time should be set to the desired time (in seconds) when you would like to pause the video after it has started to play. The `type` attribute on the `<source>` tag can be one of `video/youtube`, `video/vimeo`, or `video/mp4`. When using `video/youtube` or `video/vimeo`, you can use the URL found in your browser address bar as the URL to place in the `src` attribute. When using `video/mp4`, you must use the full URL to the actual mp4 file location in order to use the gated video feature.

```
<video width="640" height="360" data-form-id="1" data-gate-time="15">
    <source type="video/youtube" src="https://www.youtube.com/watch?v=QT6169rdMdk" />
</video>
```

If the form you've chosen to display has the *Successful Submit Action* set to *Display Message* and you've entered text into the *Redirect URL/Message* text box on the form edit screen, that message will be displayed for 3 seconds.

To use a gated video on your landing page, simply click into a textarea in your template builder, and you will see the Froala editor pop up. In the top row, next to the *Insert Image* icon, is the *Insert Gated Video* icon. Click that, and you can then use the modal that opens to insert gated videos into your landing page.



CMS Plugins

The gated video feature of Mautic is simplified by using one of our CMS plugins. We have CMS plugins for WordPress, Joomla, Drupal, Grav, and Concrete5. When using the CMS plugin to embed video content, be sure that you have installed the latest version of the plugin for your CMS of choice. Once installed, you can use the syntax below to embed gated videos into your content.

WordPress, Grav

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

Drupal, Joomla

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

Landing Pages

Pages within Mautic are a powerful tool for quickly creating compelling content with a single focus. Use pages for directing contacts through a form or providing a way to download an asset, or merely tracking interest in a particular subject.

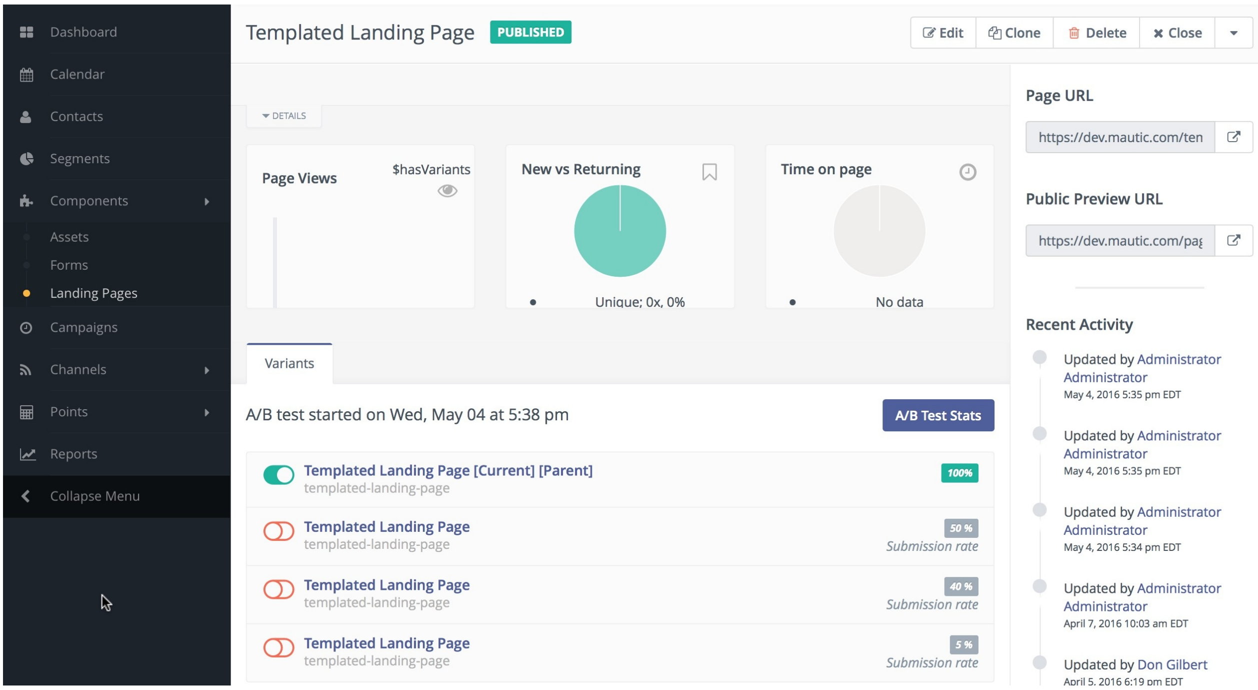
Features of Landing Pages

There are many great features with Mautic landing pages. These pages allow you to create an A/B testing environment (more on this later), multilingual pages, and templated pages unique to a variety of pre-defined templates.

Manage Pages

Page Details

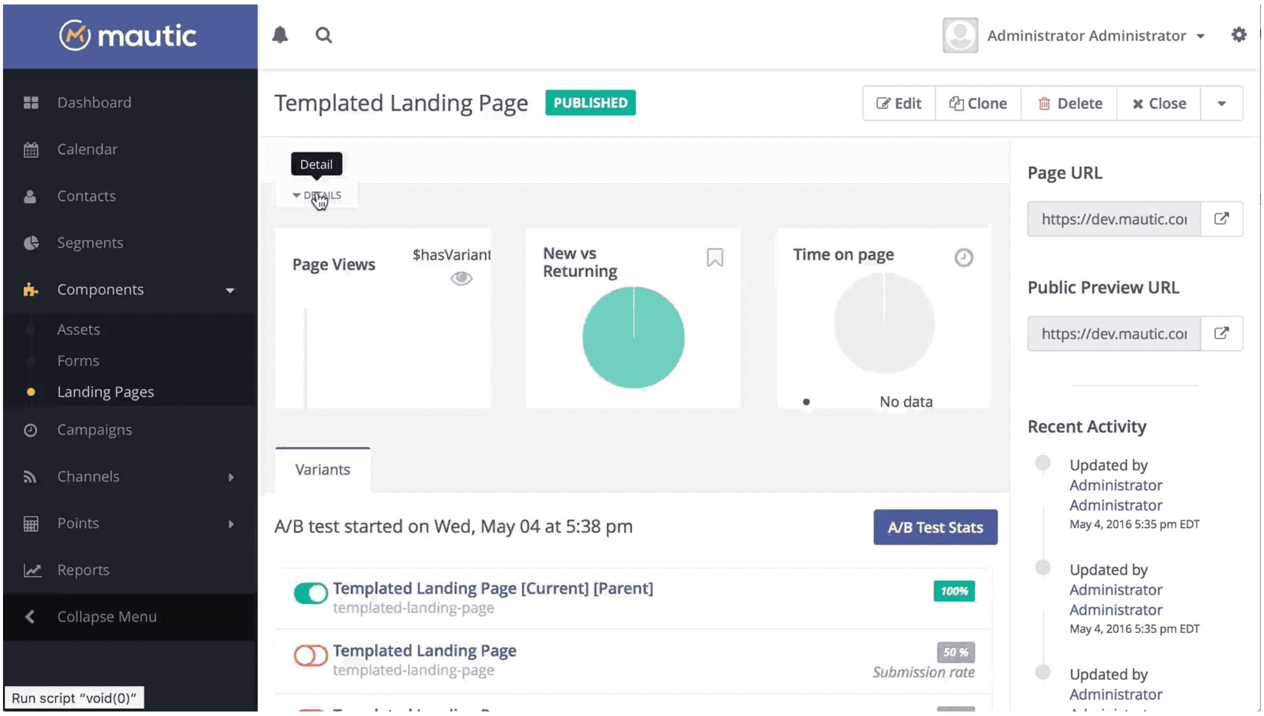
When viewing a page within Mautic you can find a tremendous amount of information on a single page overview.



You can see the page description at the top below the page title. Quickly see charts with the page views, new vs. returning visitors, and the average time on page. These charts are updated in real-time based on traffic.

On the right you will find a link which you can use to preview the page and a list of recent activities that are related to the page.

Notice when viewing the page details you can select the Details tab located just below the description to expand the area and see more specific details.



Translations and Variants

As mentioned previously when viewing the page details you can also view the various translations and page variants which have been created. These variations are also useful when performing A/B testing.

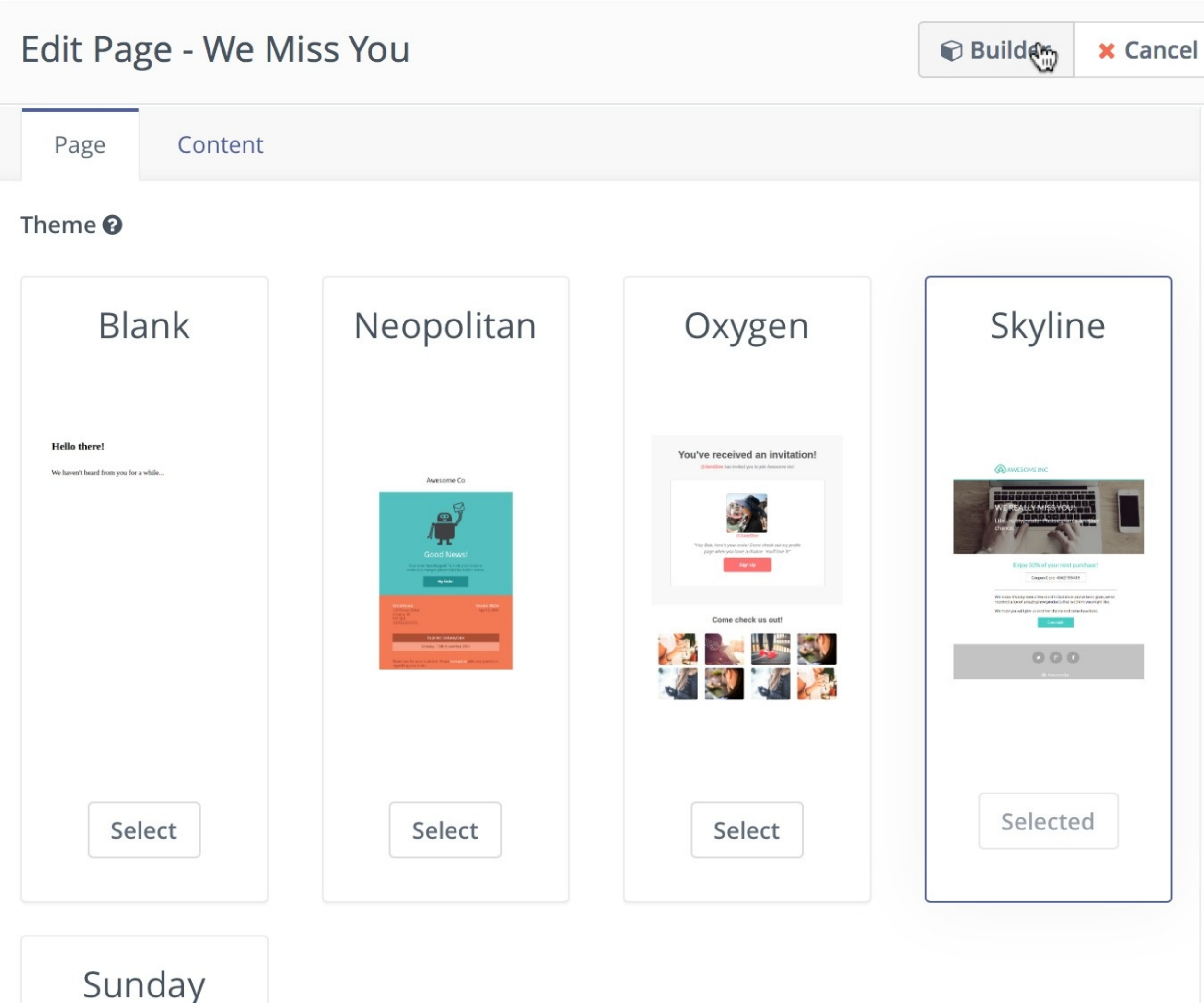
When creating/editing a landing page, there are the options to configure a language and translation parent. By selecting a translation parent, the current item is then considered to be a translation in the selected language of that parent item.

If the contact has a preferred locale or browser set in an available translation, and that translation exists, the translated landing page will automatically display for that contact. A contact's preferred locale is automatically gleaned from the browser's settings but can be overridden by editing the contact's preferred locale profile field.

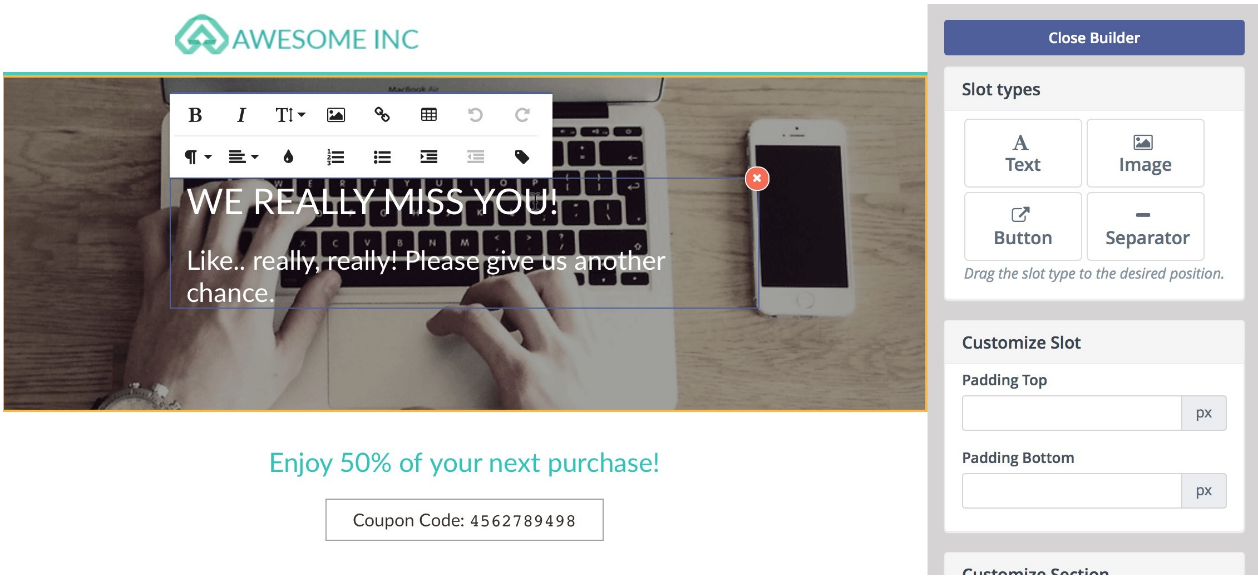
It is also possible to have translations of A/B test variants.

New/Edit Pages

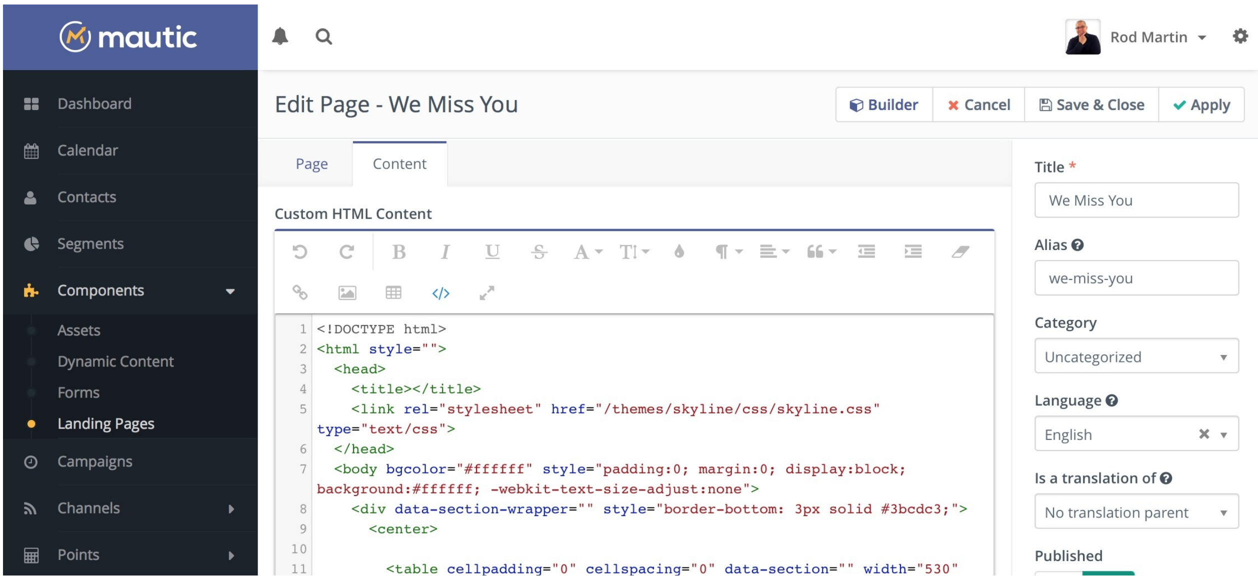
The page form allows you to create new pages and offers a number of fields for your convenience. You will notice most of them in the following screenshot. In particular you will notice the Page Builder button on the top toolbar. This is where you will launch the page builder to easily create your page layouts.



Every part of the template is editable via drag and drop. Click in a text box to edit. Click on an image to replace. Once you're happy, just click "Close Builder" and you'll see a representation of the page.



You can fine tune any aspect of the page via the Content tab and Source Code view. You can even paste your own HTML inside.



You are also able to define a template to use with your page as well as the language of your page. Notice the convenience field where you can define the parent page as well. This allows you to link pages.

The page builder provides quick and convenient access to assets, other landing pages, and forms. All those are accessible via tokens in format `{component=item}` , for example `{form=4}` . A drop-down with options will appear when you type `{` character and you can search for the right token by typing its name. For example if you type `{for` , it will suggest the right token for a form which has "for" in its name and you can select it via keyboard or by clicking on it.

Since Mautic 2.7.0, the builder will let you drag the predefined content sections from the right hand toolbar and drop them to the position you choose. It's possible to select from layout of 1, 2 or 3 columns. The existing sections can be re-ordered or removed.

Code Mode

Go to the Code Mode docs.

Unpublish a page

The pages can be unpublished and published again with a click of a button or by setting publish/unpublish date in the page configuration. Unpublishing a page means that contacts will see the 404 message (page not found) instead of the page itself.

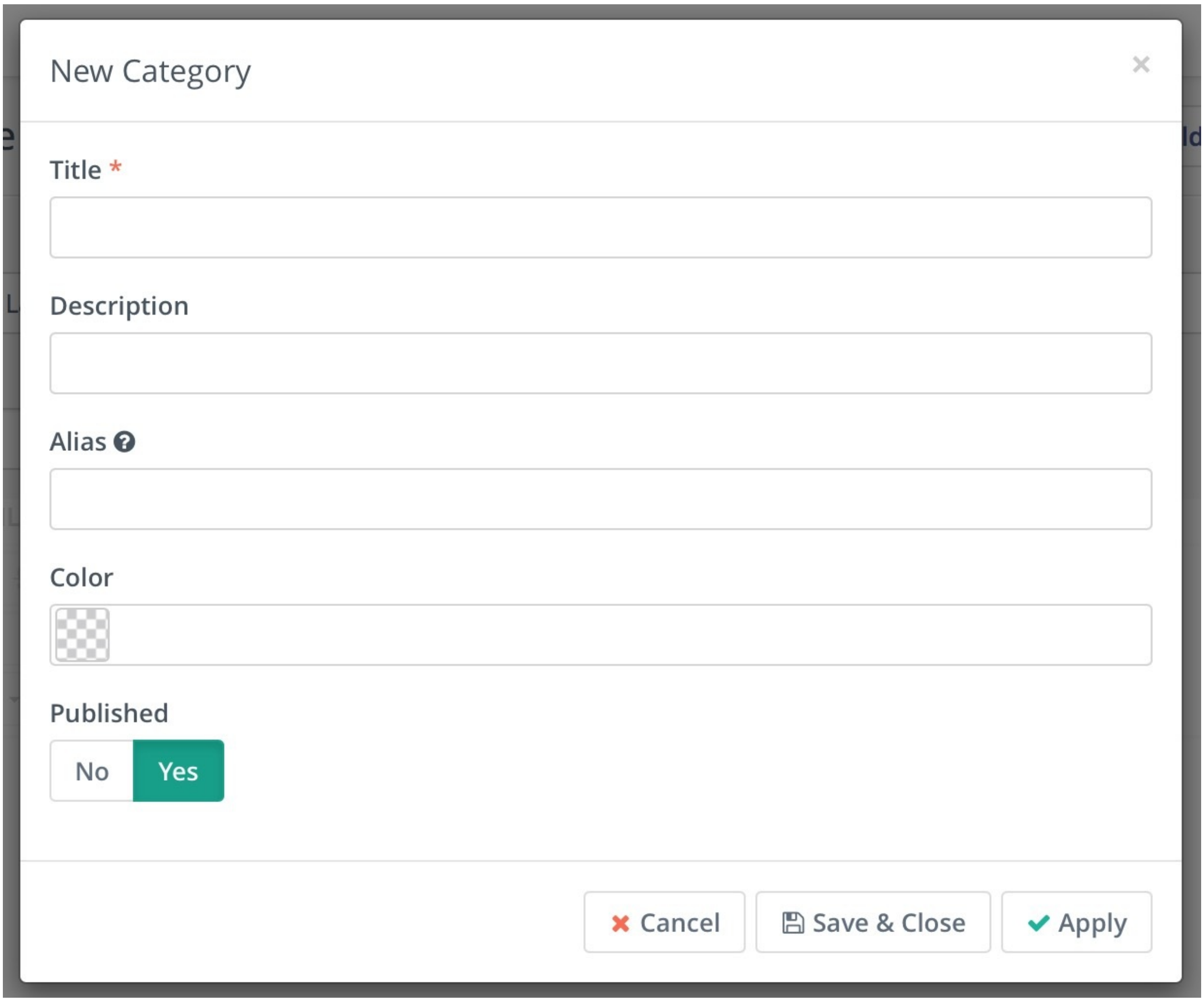
Redirect when a page is unpublished

Mautic allows you to configure a 301 (permanent) or a 302 (temporary) redirect. The redirects will work if the page is unpublished.

Note: When you are logged in as a Mautic administrator, you will always see the page content even though it is unpublished. But if you log out of Mautic or open the page in an incognito window to emulate access of a normal contact, you will be able to see the 404 message or the redirect if configured.

Manage Categories

As with many other areas of the Mautic platform you can create categories specific to the pages section. This means any categories you create here can be used for any page.



When creating a new category you can select the title, description, alias and color. The color will be helpful to quickly find pages by their appropriate category when viewing things like the calendar or other areas within Mautic.

Page Troubleshooting

Page hit tracking doesn't work

Page hits are being tracked by a tracking pixel. That is simply a 1 pixel GIF image in the source code of the Page source code. When a page is hit by a browser, it tries to load the images in it. The image load request is actually what Mautic needs to track the page hit action.

If the tracking doesn't work, check:

1. The tracking doesn't work for logged in Mautic administrators. This way statistics aren't skewed by Mautic administrators looking at the page result while editing a page. So make sure you are logged out of Mautic or use an incognito browser window while testing the tracking.
2. The tracking pixel isn't part of the page you want to track. Mautic can only track pages which have the tracking pixel in their source code.
3. The tracking pixel is not configured correctly. You can confirm this by looking at the dev tools of your browser. While looking on the page you wish to track, open the dev tools (press F12), go to the Network tab and reload the page. You'll see all the requests which were made. Filter those requests to images only and find the mtracking.gif image. Does it have status 200? If not, the path to your Mautic instance is probably incorrect.

Info about the Tracking Pixel

Mautic - Device Granularity

Mautic records devices used to visit pages and open emails.

Requirements

To detect devices Mautic uses (https://github.com/piwik/device-detector). Please be sure you have this library installed in your Mautic instance.

Test this feature

For Mautic pages and emails

Every page and email created with mautic should detect the device used to view a page or open an email. Emails need to be sent from a public instance of mautic in order to test open actions, or you can copy the tracking pixel URL and paste it in an incognito window of your browser to test in a local server.

For Non-Mautic pages and emails

Any page or email that has Mautic's tracking pixel should detect the device used to view a page or open an email.

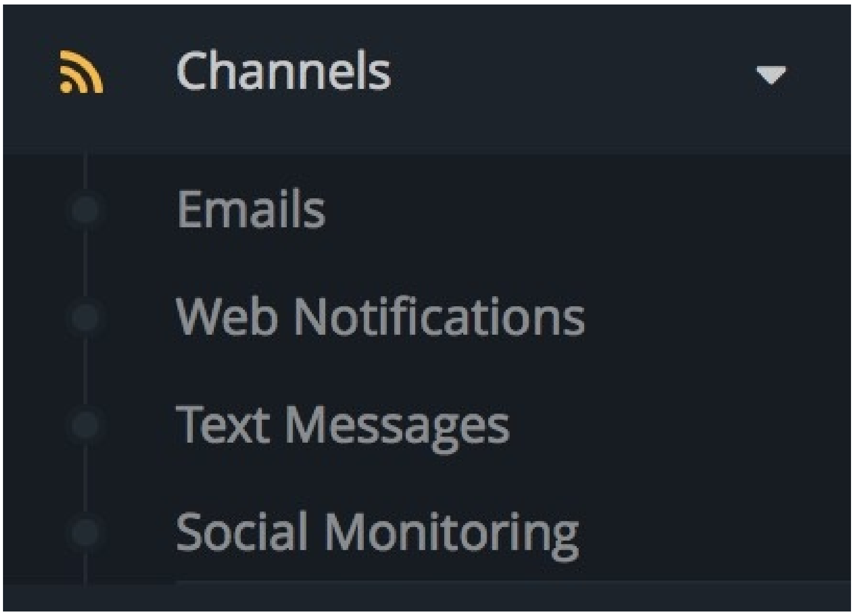
How to use this feature

- You should see devices used to view pages in the contact's timeline
- Life cycle chart displays a graph of devices used by contacts in a particular segment
- Email details display a pie chart of devices used to open an email next to the statistics graph
- Reports of devices used per contact is now part of the reports bundle

The **Channels** Dropdown contains:

- Emails
- Web Notifications
- Text Messages
- Mobile Notifications
- Tweets
- Social Monitoring

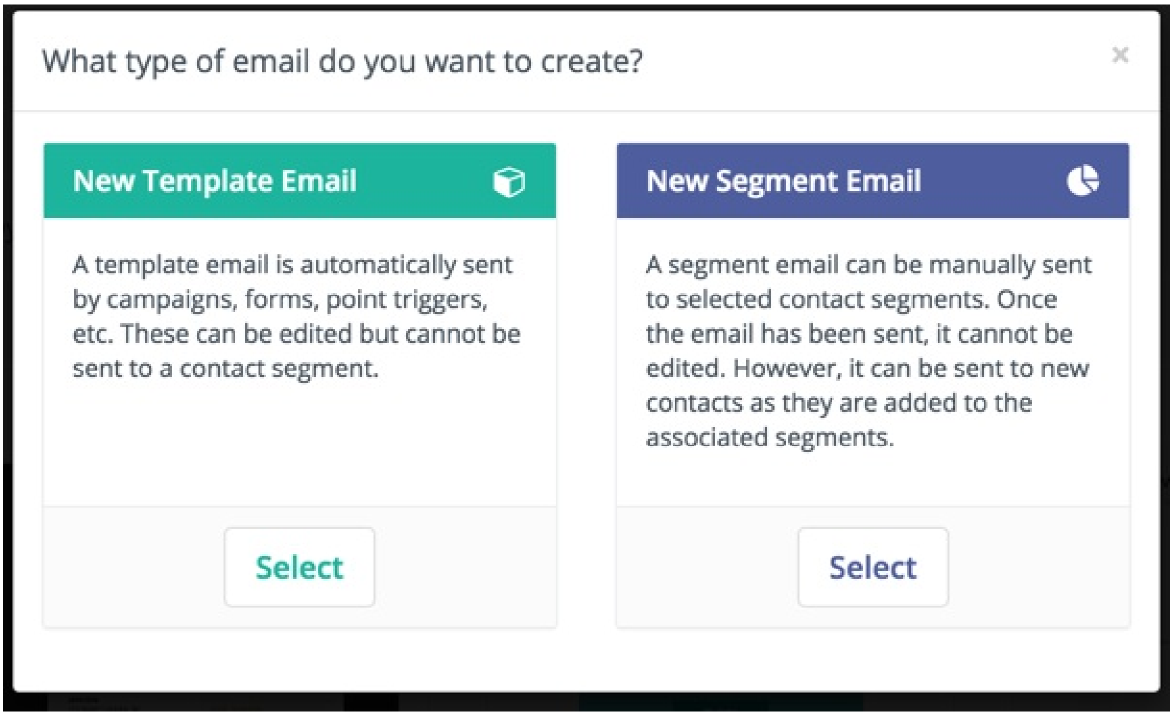
All of these must be created or configured before you can use them in a campaign.



Emails

Emails can be created to be used within campaigns and other list activities. Emails provide a means for direct interaction with potential customers, clients, and contacts.

Email Types



There are two types of emails: template and segment (broadcasts).

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. These cannot be sent to a contact outside of another Mautic component except when sending an email directly to a contact in which the content is cloned (template emails sent directly to a contact are not associated with the template email itself and thus stats are not tracked against it).

Segment (Broadcast) Emails

These are marketing emails by default. Segments are assigned to the email which will determine which contacts receive the communication. Note that each contact can only receive the email once - it's like a mailing list.

Initiating these emails can be done in one of two ways. Prior 2.2.0, sending had to be manually initiated through the UI as an ajax process batched over the contacts. As of 2.2.0, a new cron job is available to do this for you! See Send Scheduled Broadcasts (e.g. segment emails) for more details on this.

Email Formats

Emails can be created in both full HTML as well as basic text format to be delivered as necessary to contacts. This is an important part of creating a strong relationship with contacts by providing relevant information in the correct format.

Email Delivery

Emails are delivered using the method defined by the system administrator. If you are the system administrator for your company, then you will need to add the email protocol for your company to use. Mautic integrates with any email service provider which offers SMTP mail servers as well as several distinct services such as Mandrill, Gmail Sendgrid, Mailjet, Postmark, Sendmail and Amazon SES.

The system can either send emails immediately or queue them to be processed in batches by a cron job.

Immediate Delivery

This is the default means of delivery. Mautic 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 Mautic if using a remote mail service since Mautic 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.

Queued Delivery

This is recommended if you plan to send a significant number of emails. Mautic will store the email in the configured spool directory until the command to process the queue is executed. Set up a cron job at the desired interval to run the command:

```
php /path/to/mautic/app/console mautic:email:process --env=prod
```

Some hosts may have limits on the number of emails that can be sent during a specified timeframe and/or limit the execution time of a script. If that's the case for you, or if you just want to moderate batch processing, you can configure batch numbers and time limits in Mautic's Configuration.

Email Fields

You have access to any number of 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.

Tracking Opened Emails

Each email sent through Mautic is tagged with a tracking pixel image. This allows Mautic to track when a contact opens the email and execute actions accordingly. Note that this technology 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 Mautic to know if the email was opened.

Tracking trackable 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 Click Counts tab.

Unsubscribing

Mautic has a built in means of allowing a contact to unsubscribe from email communication. If using the builder, simply drag and drop the Unsubscribe Text or Unsubscribe URL tokens into your email. Or insert `{unsubscribe_text}` or `{unsubscribe_url}` into your custom HTML. The unsubscribe text token will insert a sentence with a link instructing the contact to click to unsubscribe. The unsubscribe URL token will simply insert the URL into your custom written instructions.

Online version

Mautic manages also the hosting of an online version of the email sent. To use that feature, simply add the following as URL on text to generate the online version link `{webview_url}`.

Manage Emails

Email Overview

The email overview allows at-a-glance information regarding the success or failure of a particular email. You can quickly see relevant information in regards to opens, bounces, successful click-throughs and other important statistics.

Email Creation

Email creation can be handled through the graphical email builder with little to no HTML knowledge. Emails are assigned to particular segments and/or campaigns. Below are some key steps to be performed when creating an email.

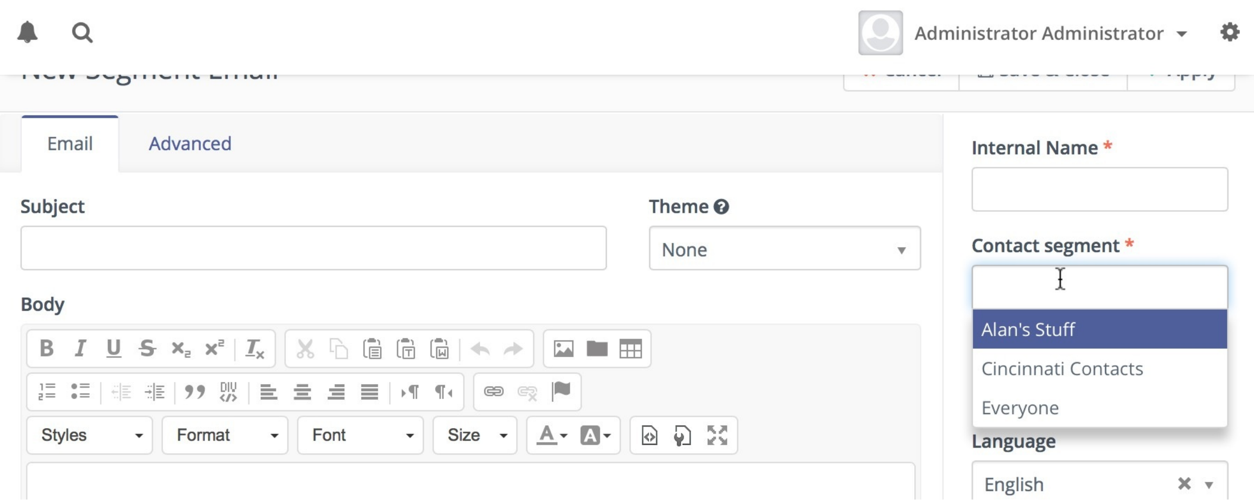
Translations

When creating the email, an option is given to assign a language and a translation parent. By selecting a translation parent, the current item is then considered to be a translation in the selected language of that parent item. If a contact has a preferred language set, they will receive the translated version in their preferred language if it exists. Otherwise, they will receive the parent in the default language.

It is also possible to have translations of A/B test variants.

Segments

When creating an email you can select the segments to which you want to send the email.



This entry field is a multi-select which allows you to choose several segments if necessary.

Email Builder

The email builder is a graphical user interface to create an HTML email through the use of drag-and-drop tools.

Since Mautic 2.7.0, the builder will let you drag the predefined content sections from the right hand toolbar and drop them to the position you choose. It's possible to select from layout of 1, 2 or 3 columns. The existing sections can be re-ordered or removed.

The email builder provides quick and convenient access to assets, landing pages, and other extra fields which are considered important or commonly used. All those are accessible via tokens in format `{component=item}` , for example `{contactfield=company}`. A drop-down with options will appear when you type `{` character and you can search for the right token by typing its name. For example if you type `{comp`, it will suggest the right token for the Company Contact Field and you can select it via keyboard or by clicking on it.

A token can have a default value for cases when the contact doesn't have the value known. The default value can be specified after `|` character like this: {contactfield=company|Default text}.

Tokens can be used also for the Subject line, but there is no drop-down. You'll have to type it yourself or select it in the email body and copy-paste it to the subject field.

Email Builder has also special tokens for the Unsubscribe link and the Webview link:

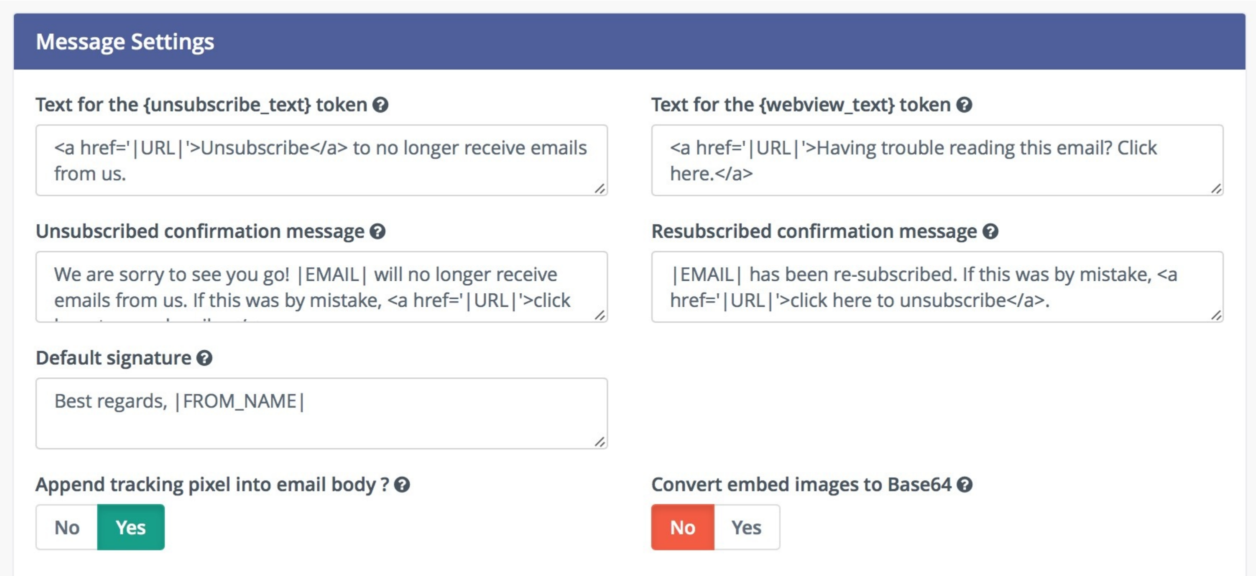
- `{unsubscribe_text}` - Creates a link with the unsubscribed URL and the text defined in the Mautic configuration.
- `{unsubscribe_url}` - Creates a URL to the unsubscribed page which can be used in a link's href attribute.
- `{webview_text}` - Creates a link with the webview URL and the text defined in the Mautic configuration.
- `{webview_url}` - Creates a URL to the webview page which can be used in a link's href attribute.

Code Mode

Go to the Code Mode docs.

Base64 Encoded Images

Since Mautic 1.4, there is a new option in the Mautic configuration, the Email Settings tab. You can let Mautic encode all images in the email text as base64. It will attach the image inside the email body. It has several implications:



- The main idea with this option is that most of the email clients will display the images directly without any approvals.
- However, some email clients like Gmail will require the approval because of the tracking pixel and won't display the base64 encoded images anyway. See the next paragraph for possible solution.
- The email body will increase significantly if the email contains many and/or big images. Some email clients like Gmail will "clip" such email and won't display it directly.

Disable the Tracking Pixel

As described above, some email clients display the image approval if one of the images is loaded from remote location. Like the tracking pixel. If you care more about this approval than the email open tracking, you can disable the tracking pixel. Then the images should be displayed directly without any approval.

Monitored Email

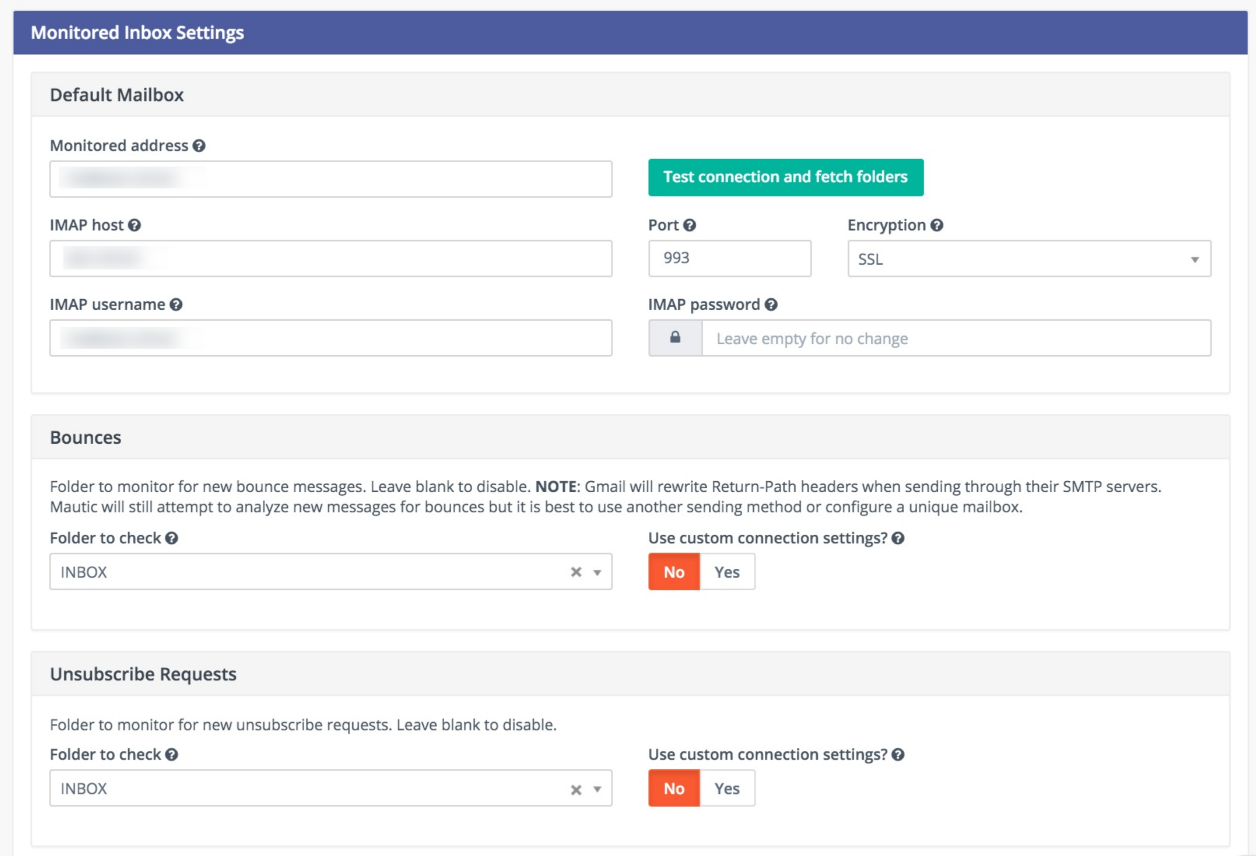
Since version 1.2.0 Mautic has provided a feature which allows monitoring of IMAP accounts to detect bounced emails and unsubscribe requests.

Note that Mautic 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` let's Mautic note what type of email it is when it examines the inbox through IMAP. The `abc123` gives Mautic information about the email itself, i.e. what contact it was it sent to, what Mautic email 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 (as of 2.2.0) support webhook callbacks for bounce management. See below for more details.

Monitored Inbox Settings

To use the Monitored email feature you must have the PHP IMAP extension enabled (most shared hosts will already have this turned on). Simply go to the Mautic configuration and fill in the account details for the inbox(es) you wish to monitor.



It is possible to use a single inbox, or to configure a unique inbox per monitor.

To fetch and process the messages, run the following command:

```
php /path/to/mautic/app/console mautic:email:fetch
```

Note that it is best to create an email specifically for this purpose, as Mautic 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 Mautic can monitor a Gmail account for bounces.

If you select an Unsubscribe folder, Mautic 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.

Create a segment with bounced emails

This is not required, but if you'll want to be able to select the contacts with bounced emails easily for example to delete all bounced contacts, create the segment with bounced emails.

1. Go to *Segments* / *New*.
2. Type in the segment name. For example *Bounced emails*.
3. Select the *Filters* tab.
4. Create new *Bounced Email* equals Yes filter.
5. Wait for the `app/console mautic:segments:update` command to be automatically triggered by a cron job or execute it manually.

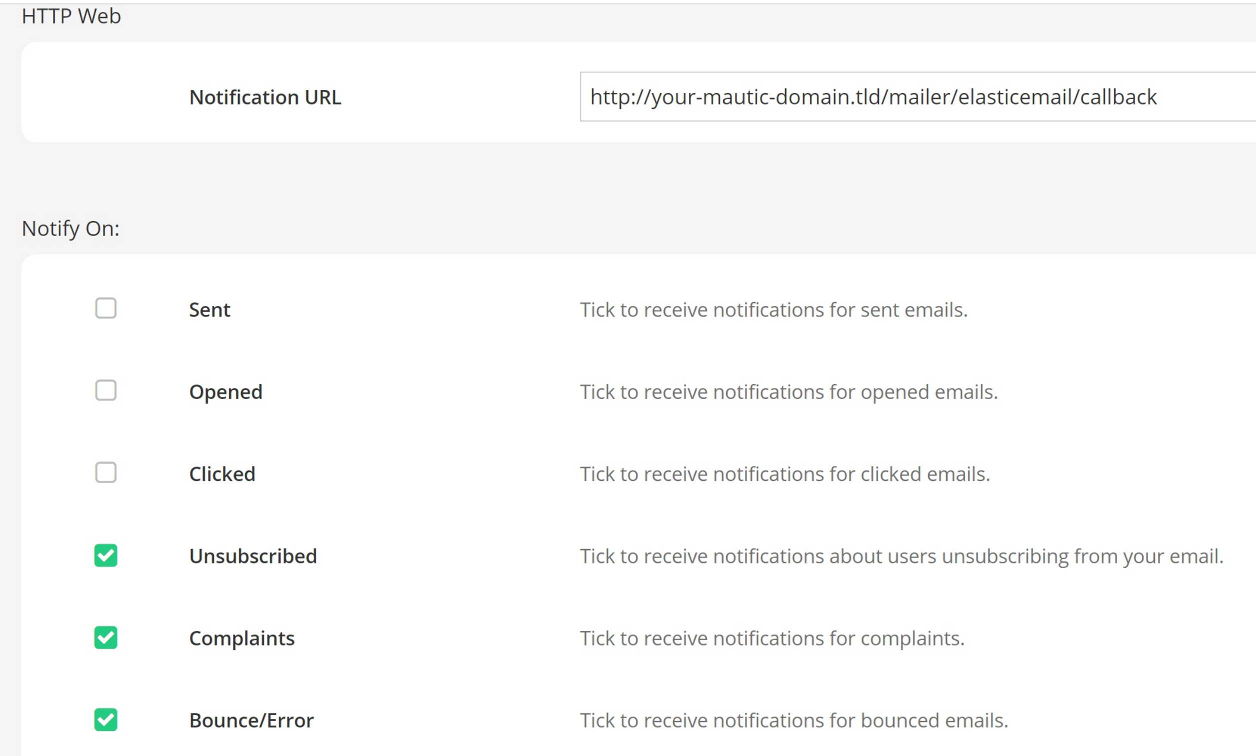
All contacts with bounced emails should appear in this segment.

Elastic Email Webhook

1) Login to your Elastic Email account and go to Settings -> Notification.

2) Fill in the Notification URL as http://your-mautic-url.tld/mailer/elasticemail/callback

3) Check these actions: Unsubscribed, Complaints, Bounce/Error



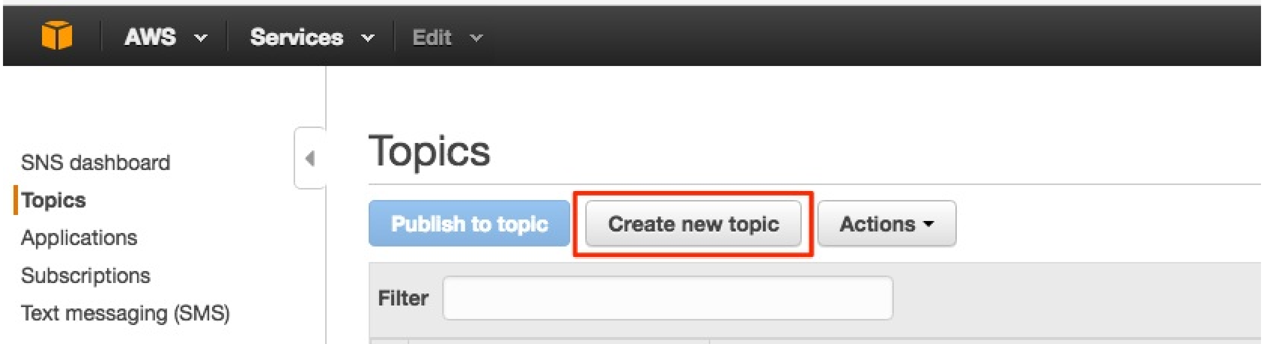
Links

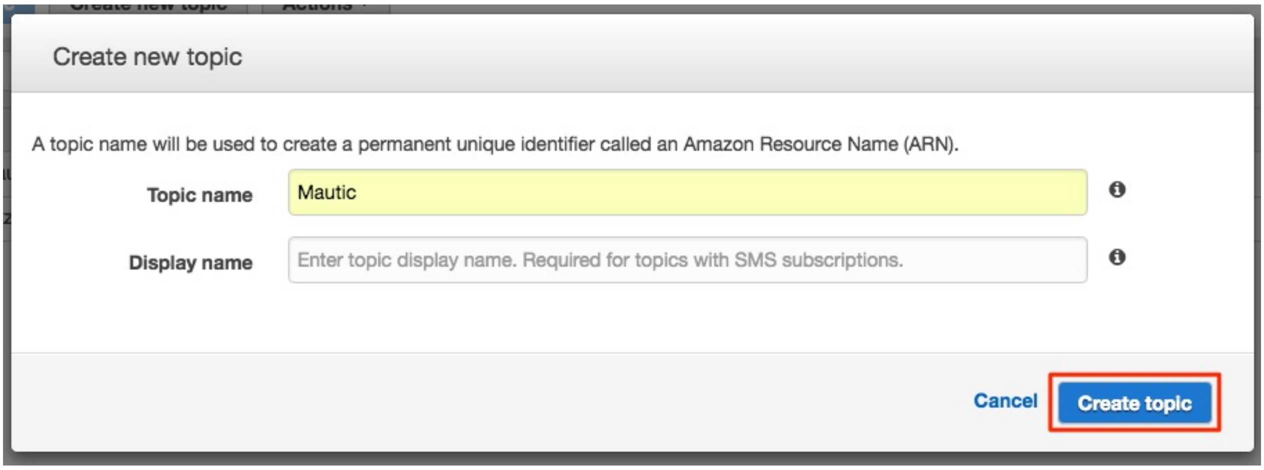
Elastic Email Help & Support Support via email

Amazon Webhook

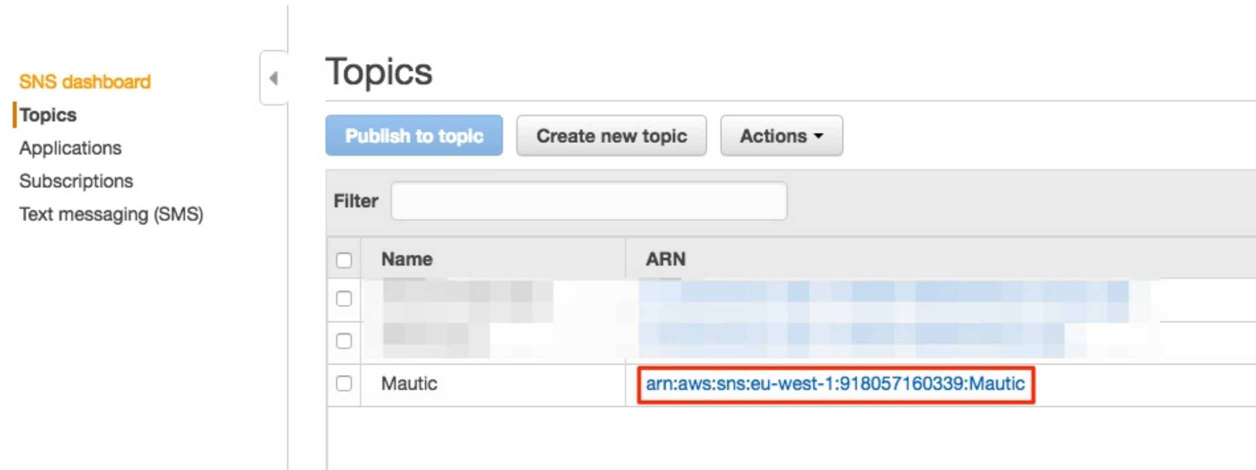
Mautic supports the bounce and complaint management from Amazon Simple Email Service (Amazon SES).

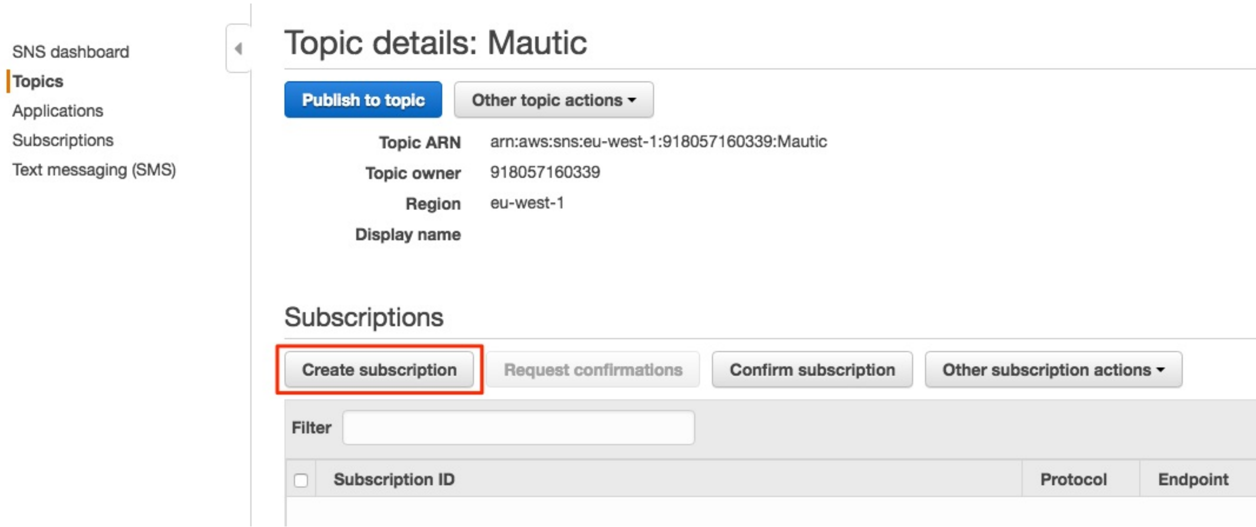
1) Go to the Amazon Simple Notification Service (SNS) and create a new topic



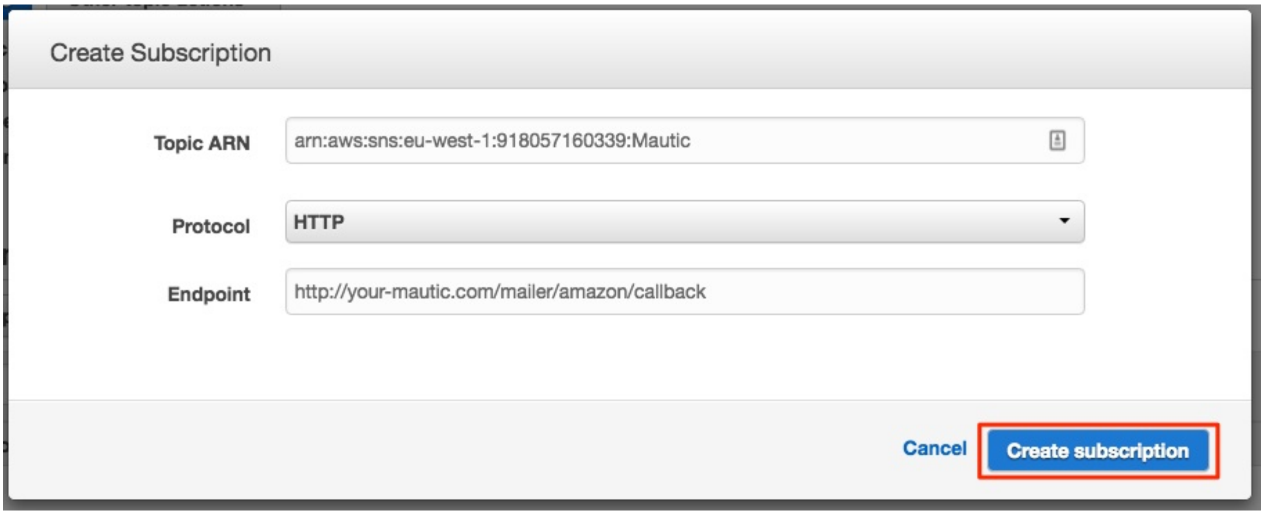


2) Click on the newly created topic to create a subscriber

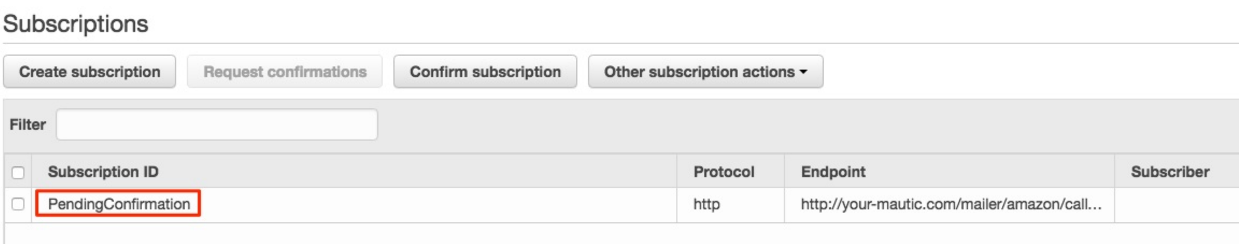




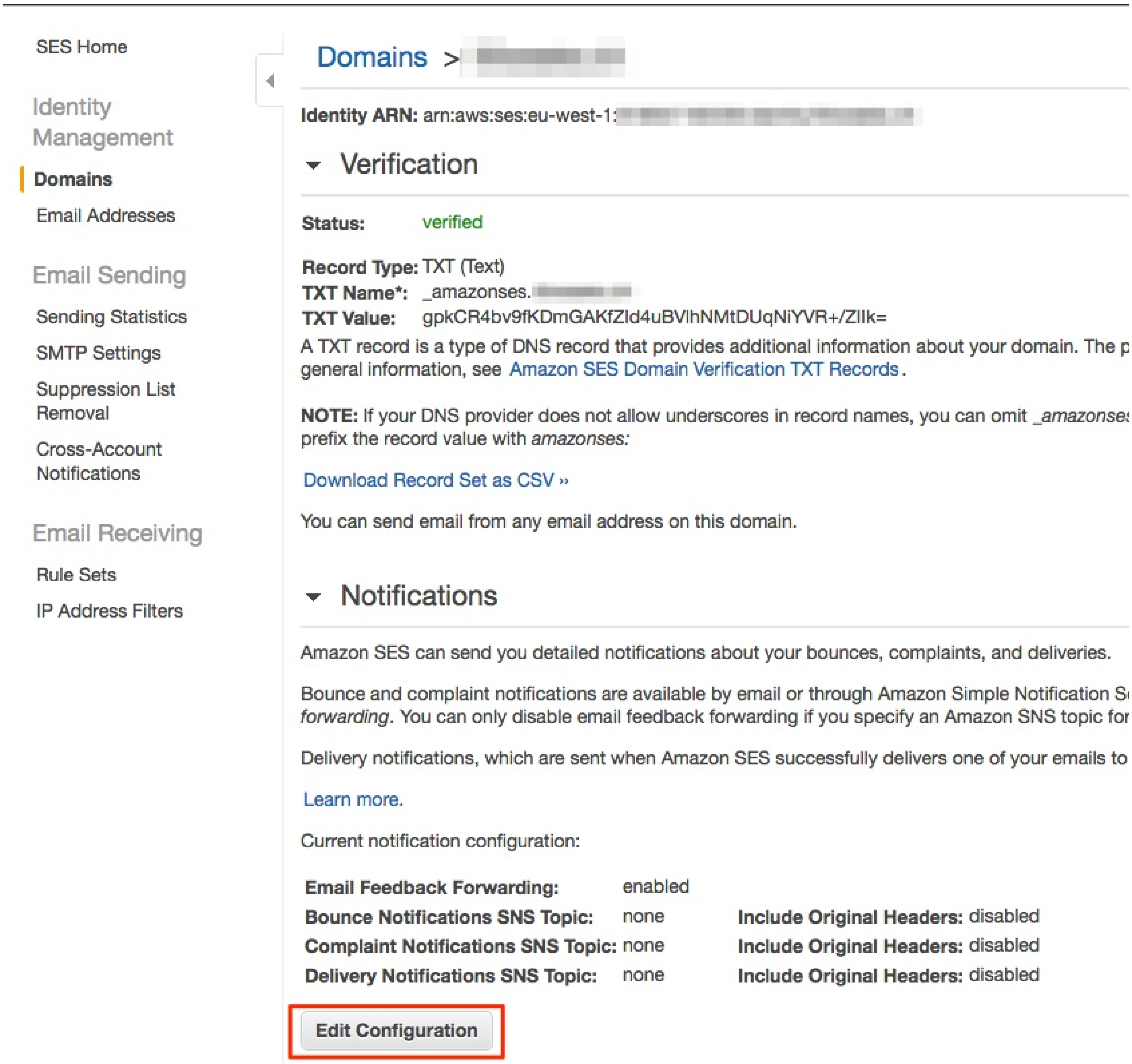
3) Enter the url to the Amazon webhook on your Mautic installation

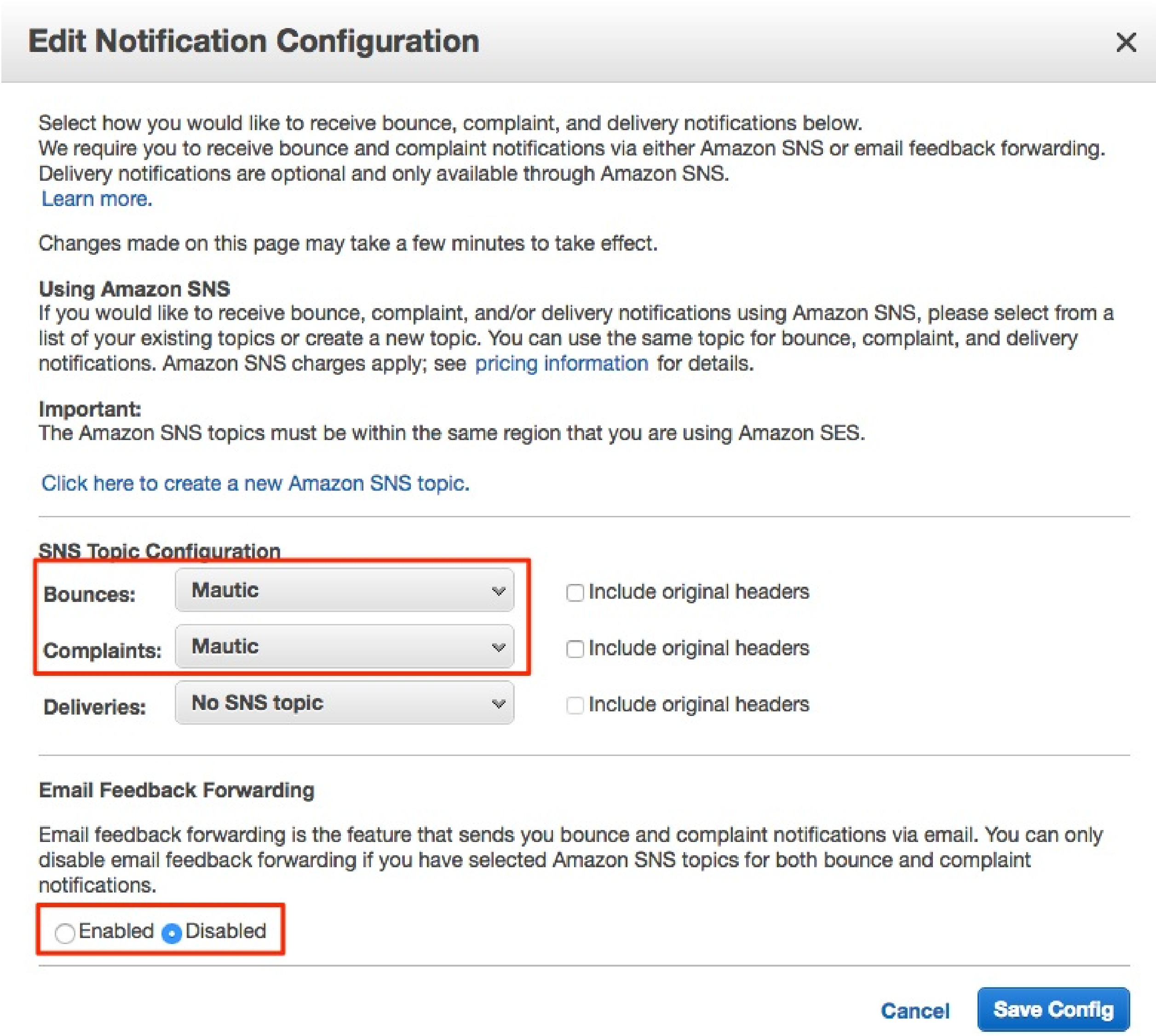


4) The subscriber will be in the pending state till it is confirmed. AWS will call your Amazon webhook with a SubscriptionConfirmation request including a callback url. To confirm Mautic will send a request back to this callback url to validate the subscription. Therefore make sure your Mautic installation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



5) The last step is to configure Amazon SES to deliver bounce and complaint messages using our SNS topic.

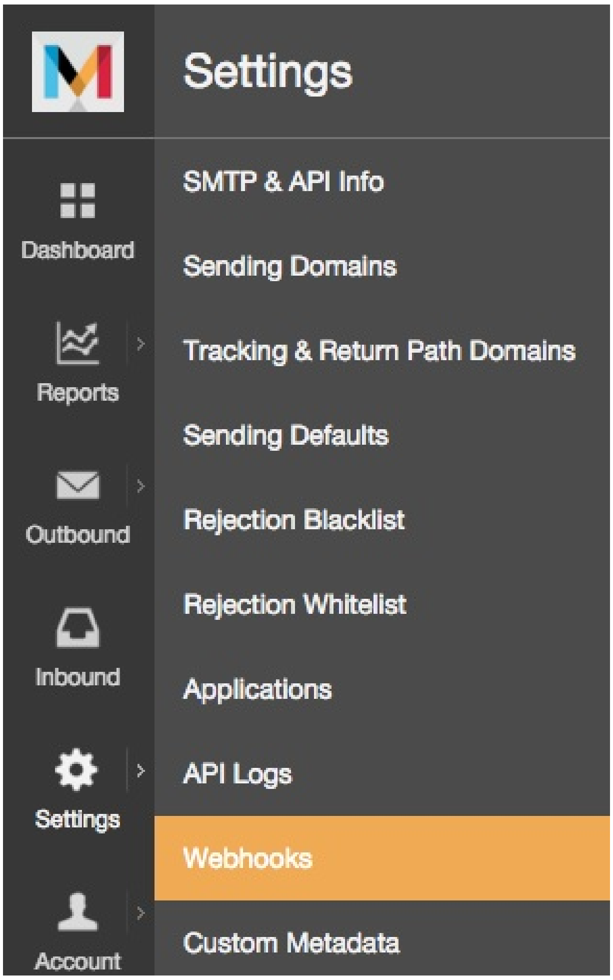

SES Home
Identity Management
Domains
Email Addresses
Email Sending
Sending Statistics
SMTP Settings
Suppression List Removal
Cross-Account Notifications
Email Receiving
Rule Sets
IP Address Filters
Domains >
Identity ARN: arn:aws:ses:eu-west-1:
Verification
Status: verified
Record Type: TXT (Text)
TXT Name*: _amazonses.
TXT Value: gpkCR4bv9fKDmGAKfZId4uBVlhNMtDUqNiYVR+/ZIlk=
A TXT record is a type of DNS record that provides additional information about your domain. The p
general information, see Amazon SES Domain Verification TXT Records.
NOTE: If your DNS provider does not allow underscores in record names, you can omit _amazonses
prefix the record value with amazonses:
Download Record Set as CSV »
You can send email from any email address on this domain.
Notifications
Amazon SES can send you detailed notifications about your bounces, complaints, and deliveries.
Bounce and complaint notifications are available by email or through Amazon Simple Notification S
forwarding. You can only disable email feedback forwarding if you specify an Amazon SNS topic for
Delivery notifications, which are sent when Amazon SES successfully delivers one of your emails to
Learn more.
Current notification configuration:
Email Feedback Forwarding: enabled
Bounce Notifications SNS Topic: none Include Original Headers: disabled
Complaint Notifications SNS Topic: none Include Original Headers: disabled
Delivery Notifications SNS Topic: none Include Original Headers: disabled
Edit Configuration



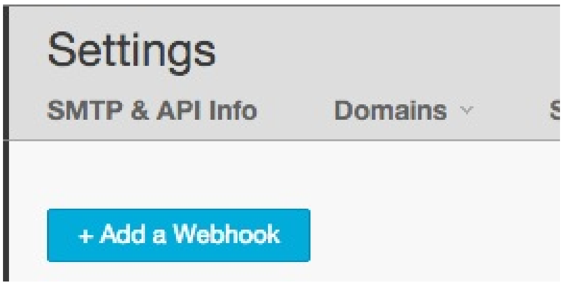
Mandrill Webhook

Mautic supports a few of Mandrill's webhooks for bounces.

1) Login to your Mandrill account and go to Settings -> Webhooks



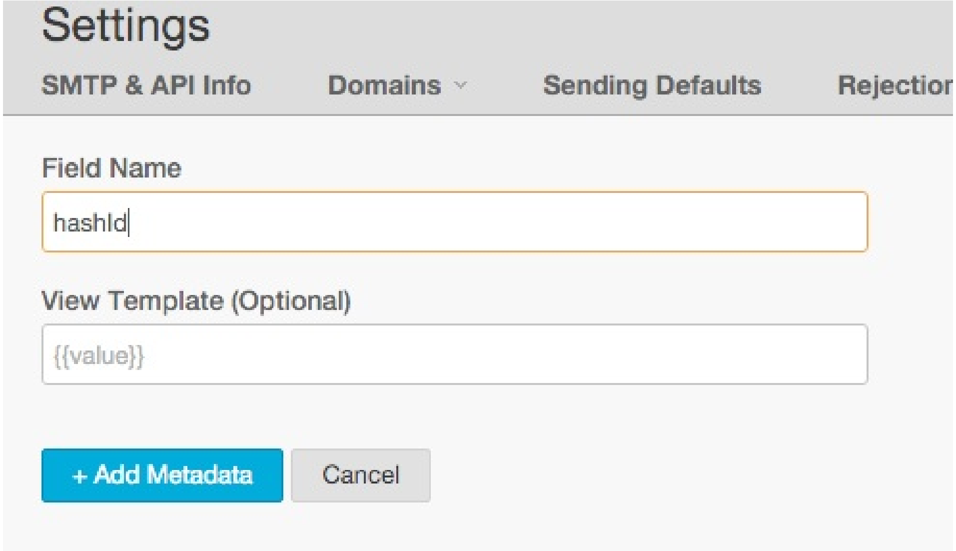
2) Click Add a Webhook

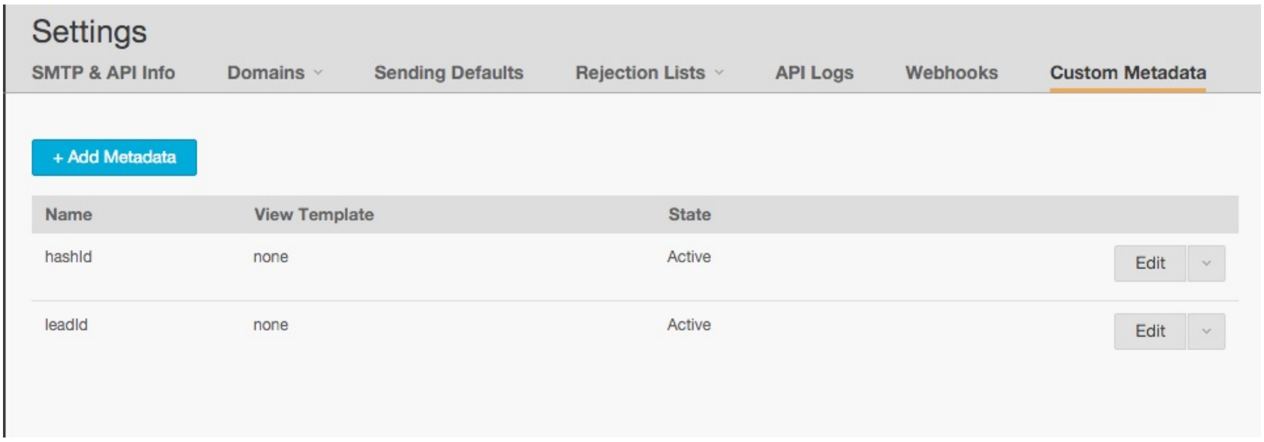


3) Mautic 1.2.2 supports the following webhooks: Message is Bounced, Message is Soft-Bounced, Message is Rejected. As of 1.2.3, Message is Marked as Spam and Message Recipient Unsubscribes will be supported.

4) Fill in the Post To Url as `http://your-mautic.com/mailer/mandrill/callback` then click Create Webhook.

5) Click Custom Metadata and create two new metadata fields: `hashId` and `contactId`

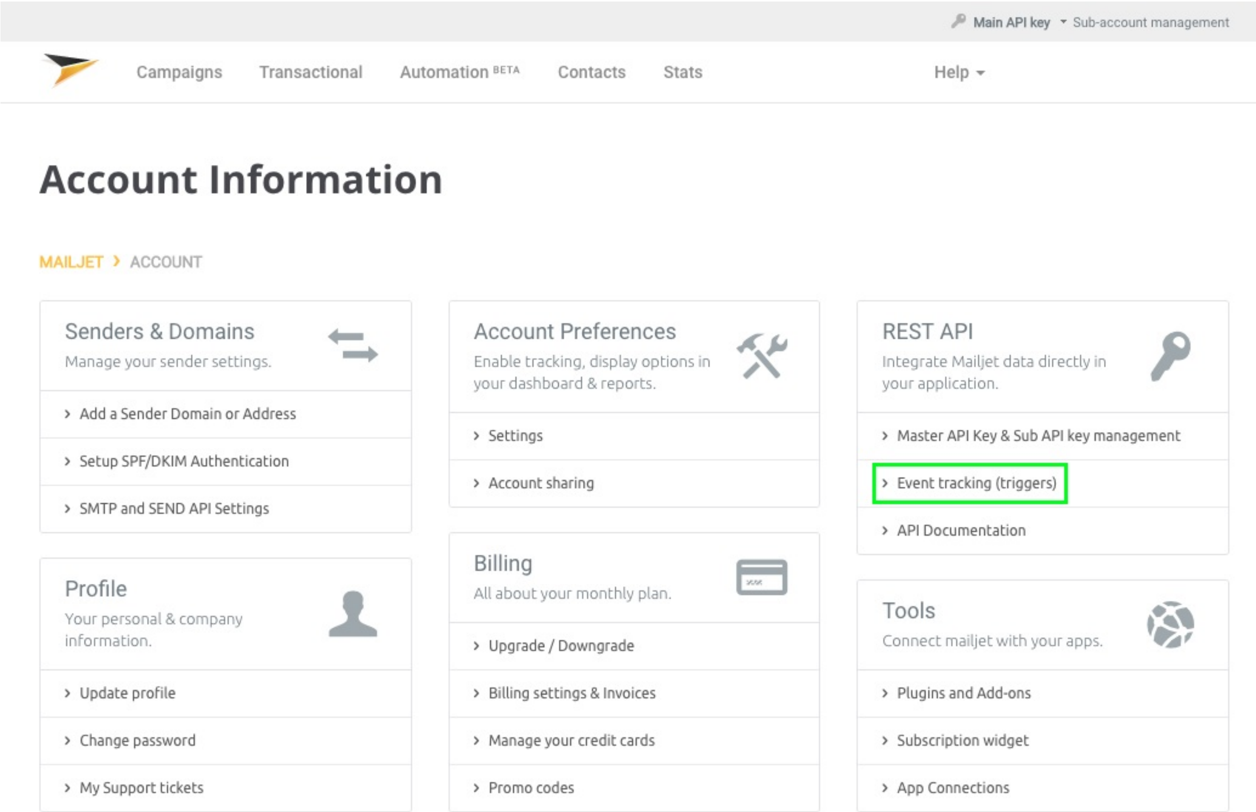




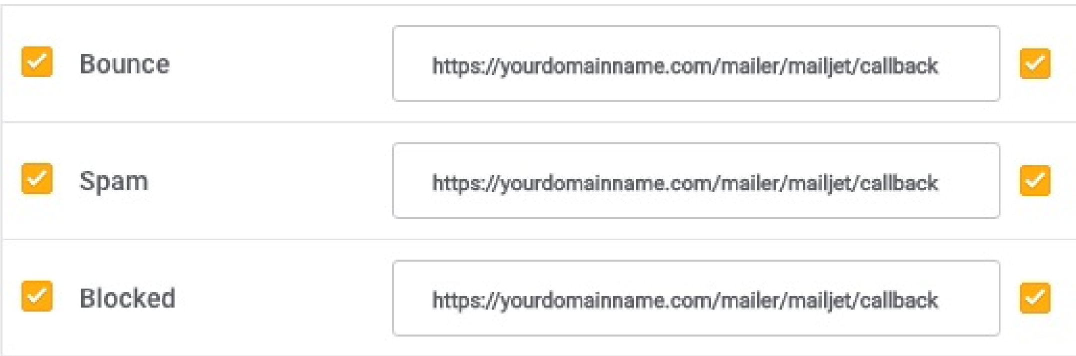
Mailjet Webhook

Mautic supports Mailjet's webhooks for bounces, spam and blocked. Before any configuration, you'll need to create an account on Mailjet.

1) Login to your Mailjet account and go to My Account -> Event tracking (triggers)



2) On the event type list, select the one you want to link to your Mautic account

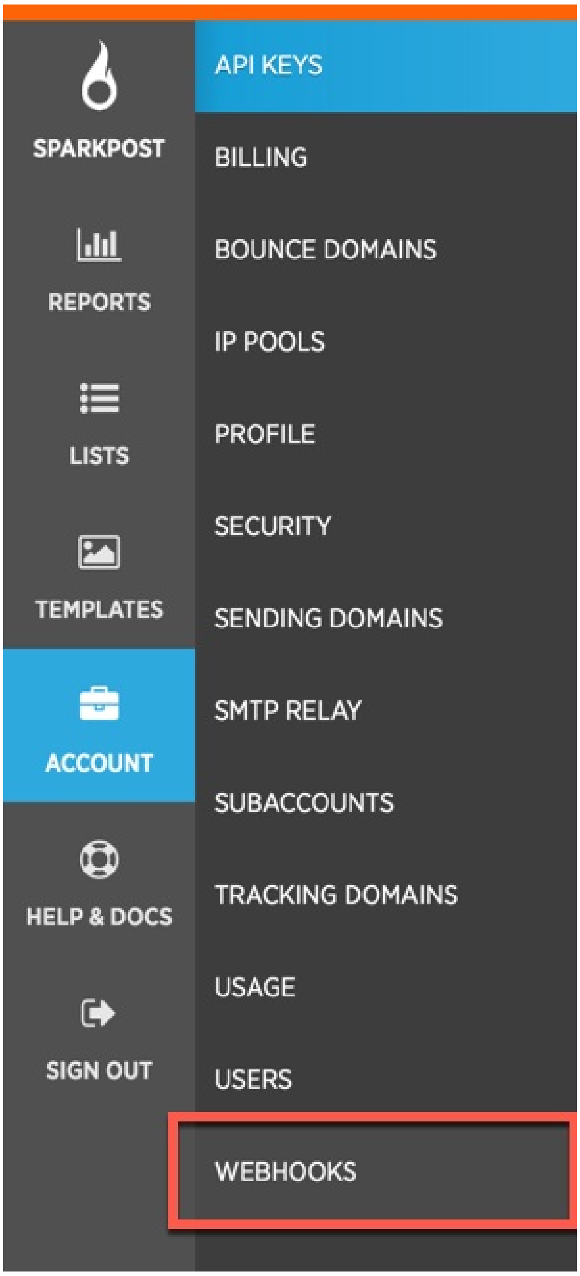


3) Mautic 2.2.0 supports the following webhooks: Message is Bounced, Message is Blocked, Message is Spam.

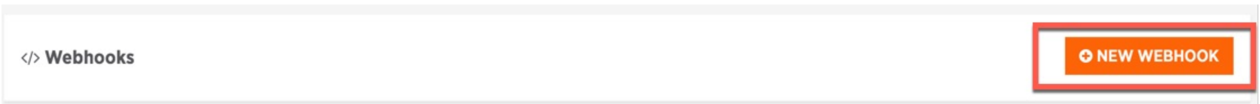
4) Fill in the URL boxes as `http://your-mautic.com/mailer/mailjet/callback` .

Sparkpost Webhook

1) Login to your Sparkpost account and go to Account -> Webhooks.

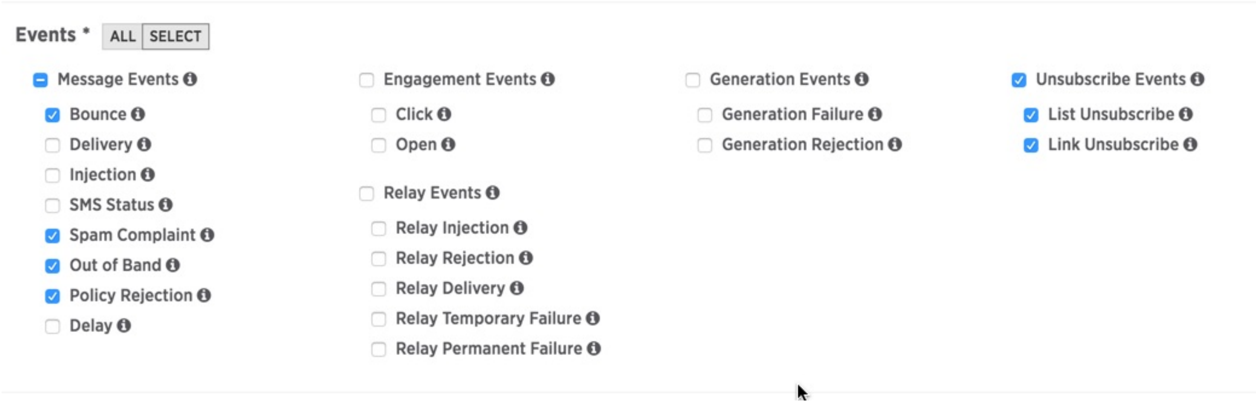


2) Click the New Webhook button top right



3) Fill in the Target URL as `http://your-mautic.com/mailer/sparkpost/callback`

4) Select the following Events


Events *
ALL
SELECT
Message Events
Bounce
Delivery
Injection
SMS Status
Spam Complaint
Out of Band
Policy Rejection
Delay
Engagement Events
Click
Open
Relay Events
Relay Injection
Relay Rejection
Relay Delivery
Relay Temporary Failure
Relay Permanent Failure
Generation Events
Generation Failure
Generation Rejection
Unsubscribe Events
List Unsubscribe
Link Unsubscribe

Emails sent from owner email and name

It allows to automatically personalize emails sent to a user who has an owner (mautic user) assigned to it. This feature changes *from email*, *from name* and *signature* from the default setting to the user setting.

Requirements

- Mautic 1.3.0+
- A non-tokenized mail transport. This feature won't work with emails sent via API (Mandrill, Sparkpost and Mailjet).

How to enable the emails sent from contact owner

- Open the admin menu by clicking the cog icon in the top right corner.
- Select the *Configuration* menu item.
- Select the *Email Settings* tab.
- Switch the *Mailer is owner* to *Yes*.
- Save the configuration.

Signature

Signature is also a new feature in the Mautic 1.3.0. There are 2 places where to configure the signature text:

1. The default signature is in the *Configuration*, *Email Settings* tab. The default text is `Best regards,<br/>|FROM_NAME|`. The `|FROM_NAME|` token will be replaced by *Name to send mail as* value also defined in the *Email Settings* tab. This signature will be used if the contact owner is not known.
2. Every user can configure his/her own signature in the profile edit page. This signature will be used if the contact owner is known.

The signature can be placed into an email text by the `{signature}` token.

There is one exception where the contact owner's signature won't be used. When a user sends an email directly from a contact detail, the currently logged in user's signature will be used. It doesn't matter if the contact has another owner assigned or if it doesn't have an owner at all.

FAQ

Does it work for all emails?

There are exceptions:

- The email has to be sent to a contact. If Mautic doesn't have a contact assigned with the email, it doesn't know its owner and therefore cannot know what user name, email and signature to choose. This happens when you send the test emails.
- If you send an email directly from the contact detail, the *from name* and *from email* will be used from the form, not from the user settings. Those values are pre-filled by currently logged in user name and email.

Email Troubleshooting

Open email tracking doesn't get tracked

Emails are being tracked by a tracking pixel. This is simply a 1 pixel GIF image in the source code of email messages sent by Mautic. When an email is opened by an email client like Outlook, Thunderbird or GMail, the client tries to load the images in it. The image load request is what Mautic uses to track the email open action.

Some email clients have auto loading images disabled, and users have to click on a "Load Images" button to load images inside an email message. If the images aren't loaded for this reason or another, Mautic doesn't know about the open action. Therefore, email open tracking is not 100% accurate.

Email link clicks are not getting tracked

Before an email is sent, Mautic replaces all links in the email with links back to Mautic including a unique key. If the contact clicks on such a link, the contact is redirected to Mautic. Mautic tracks the click action and redirects the contact to the original location. It's fast so the contact doesn't notice the additional redirect.

If the email click doesn't get tracked, make sure that:

1. Your Mautic server is on a public URL. Tracking doesn't work on a localhost.
2. Make sure the email was sent to an existing contact via a campaign or a segment email. Emails sent by the *Send Example* link, *direct email* (from the contact detail) or *form submission preview* won't replace links with trackables.
3. Make sure the URL in the `href` attribute is absolute and valid. It should start with http:// or https://.
4. You've opened the link in a incognito browser. More about it in the Pages troubleshooting.
5. Check if the link in the email has been replaced by Mautic's tracking link. If not, report it to https://github.com/mautic/mautic/issues with all the details (Mautic version, PHP version, what the link URL is before sending, what it is after sending and so on).

Unsubscribe link doesn't work

The unsubscribe link doesn't work in test emails. That is because the test emails are sent to a Mautic user and not to a Mautic contact. Mautic users cannot be unsubscribed and therefore the unsubscribe link looks like this: `http://yourmautic.com/|URL|`. However, the link will work correctly when you send the email to a contact.

Web Notifications

Web notifications integrate One Signal. Using your own OneSignal accounts, you can now push a notification to your contacts's browser (with their permission). Enable these in Mautic's Configuration to see them listed under Channels in the menu.

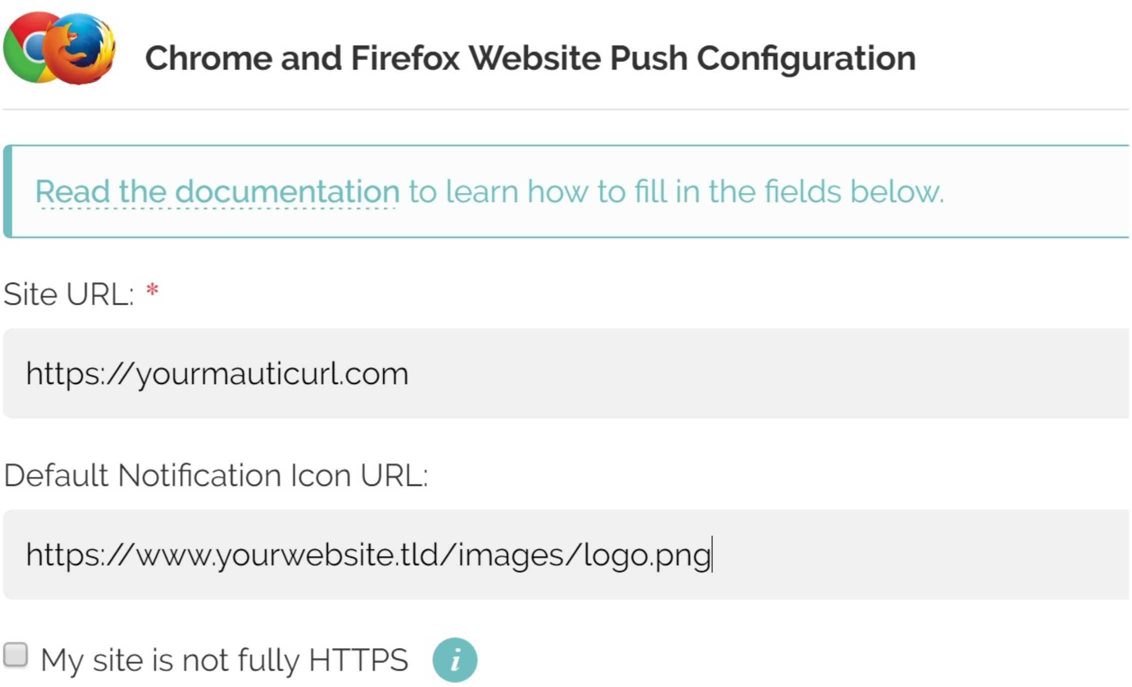
For more information see One Signal documentation

Setup

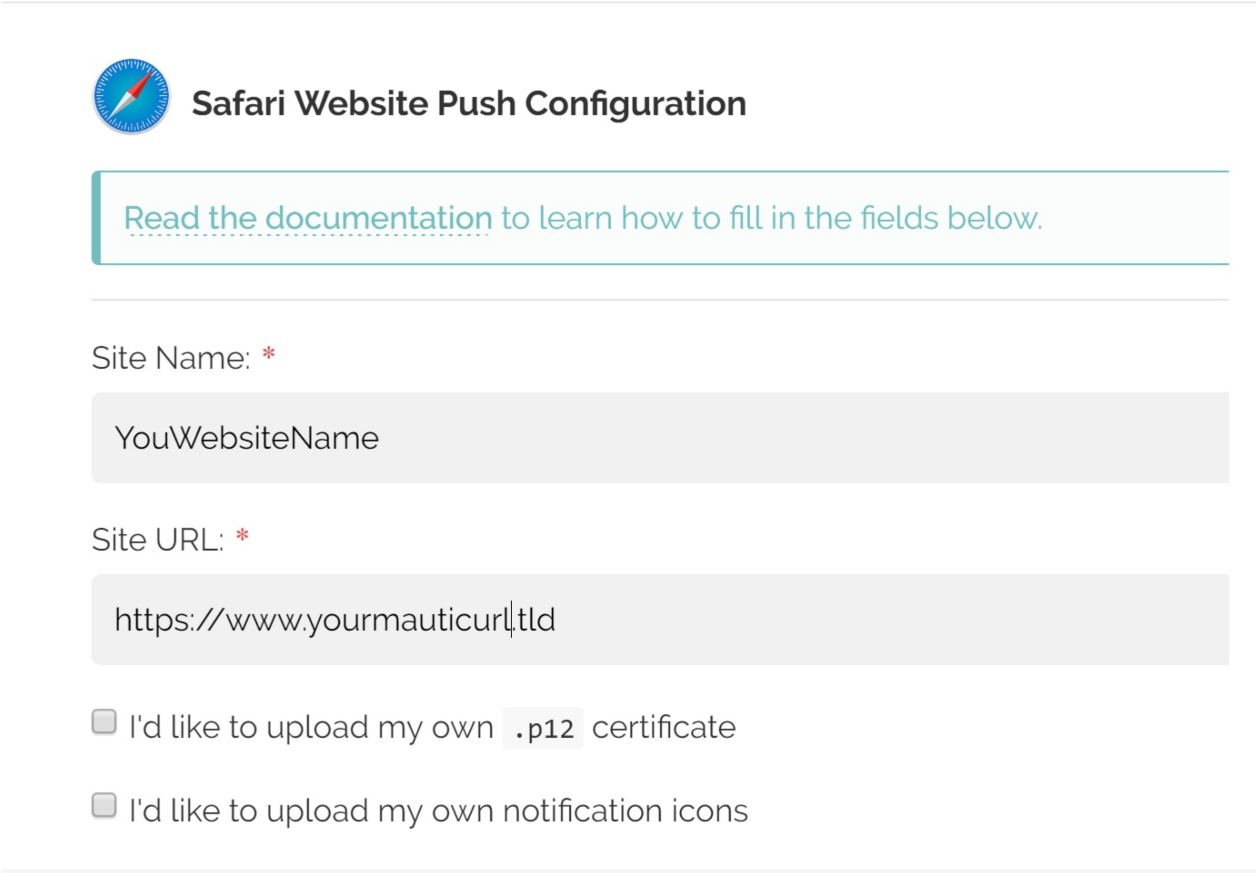
1. Create One Signal account and app

2. Setup app Website Push Platforms in you app

Google Chrome and Mozilla Firefox configuration example

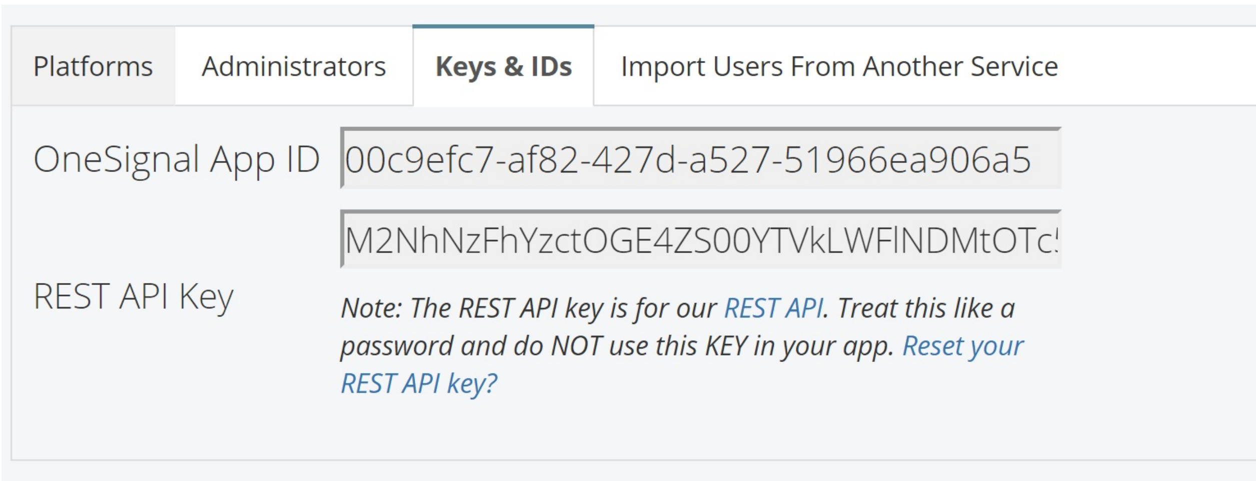


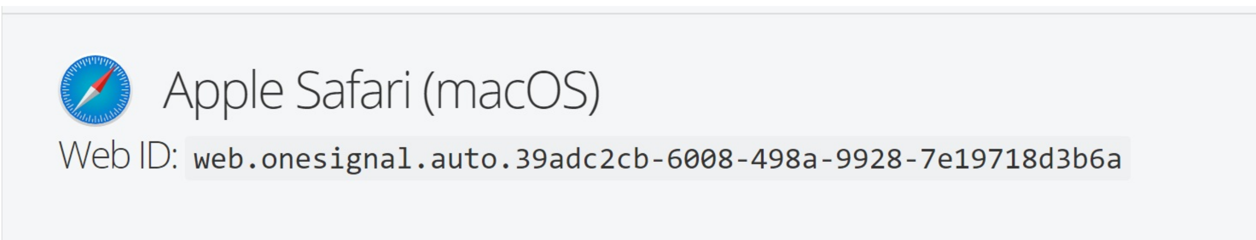
Apple Safari (macOS) configuration example



3. Setup Mautic

Enable Web Notification and copy keys from OneSignal to your Mautic > Settings > Configuration - Web Notification Settings tab





4. Test

All visitors with supported browser will be ask receive notification on all you Mautic landing pages. Create campaign and use Push Website notification action.

Options

Welcome Notifications

Option to allow disable welcome notifications. For more informations see One Signal documentation

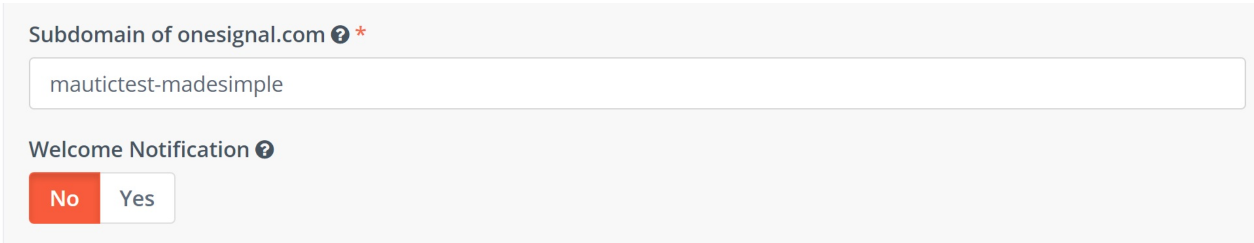
gcm_sender_id

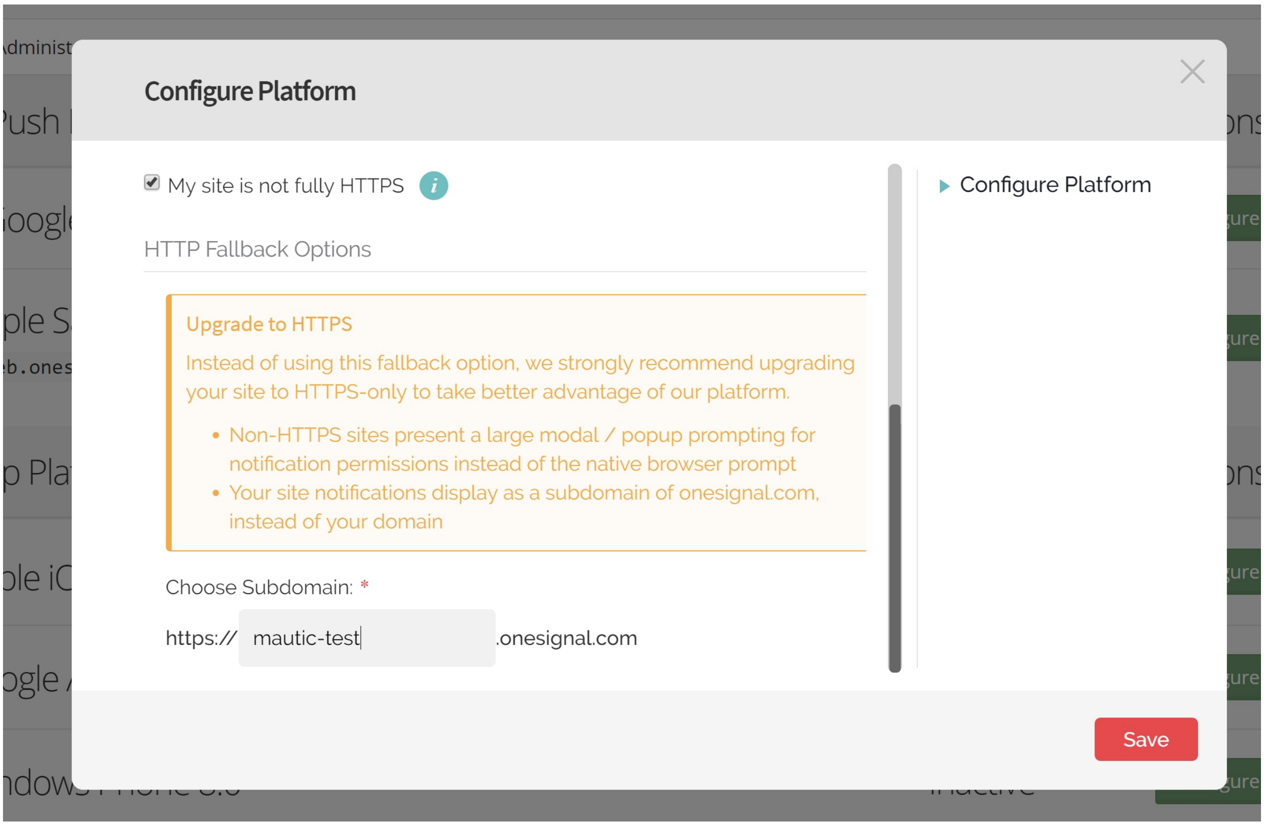
Option gcm_sender_id is a shared key used for push notifications. Use default value 482941778795. Previously it required your own key. Due backwards compatibility is editable (for older Mautic).

HTTPS and HTTP support

HTTP support was added in Mautic 2.6.

We recommend use https of your websites. But http suport for onesignal.com is very similar to https, nowdays. Just user subdomain options on onesignal.com and in your Mautic.





For more informations about http notification support read One Signal documentation

Support for Mautic landing pages and tracking pages

Support for tracking pages was added in Mautic 2.6.

Tracking page is your web page where you paste Mautic tracking code.

Don't forget copy these files to root dir of your tracking page:

https://yourmauticurl.tld/manifest.json https://yourmauticurl.tld/OneSignalSDKWorker.js https://yourmauticurl.tld/OneSignalSDKUpdaterWorker.js

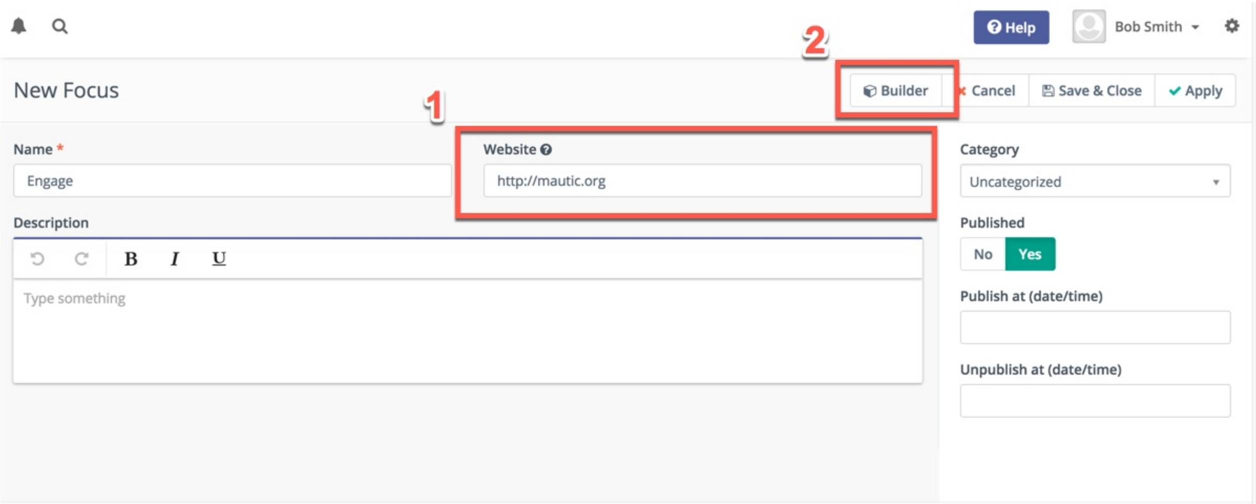
Focus

Focus allows you to engage users on your site through bars, modals, notifications and full page takeovers. These can be initiated at different times and with different actions such as exit intent.

Focus Items are listed under the Channels menu.

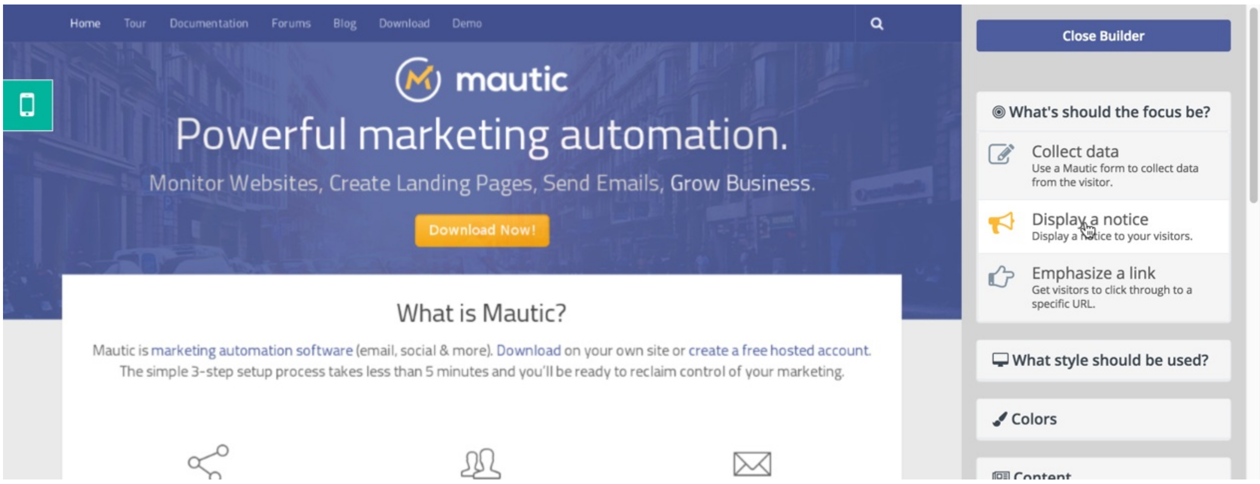
Creating a Focus Item

When creating a focus item, you'll see that there is a place to enter a website. This is currently integrated into a service offered by mautic.com to generate a snapshot of the given website to use a preview when building the focus item. If the website is a very complex website - the snapshot may not work. Note that this feature may change in the future.

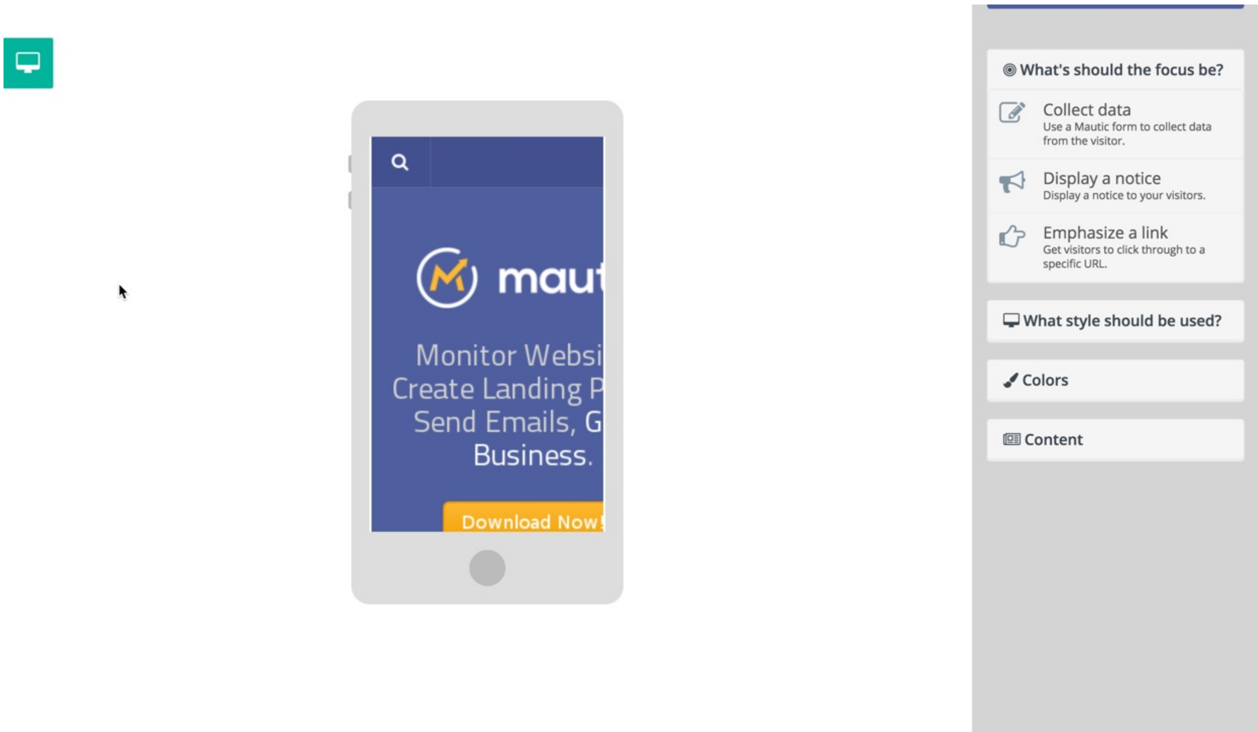


After entering the website, click the builder button top right. This is where the magic happens.

Notice that you should have a snapshot of the website. If not, you'll have the option to fetch it. Again note that some complex websites may not be snapshot-able.



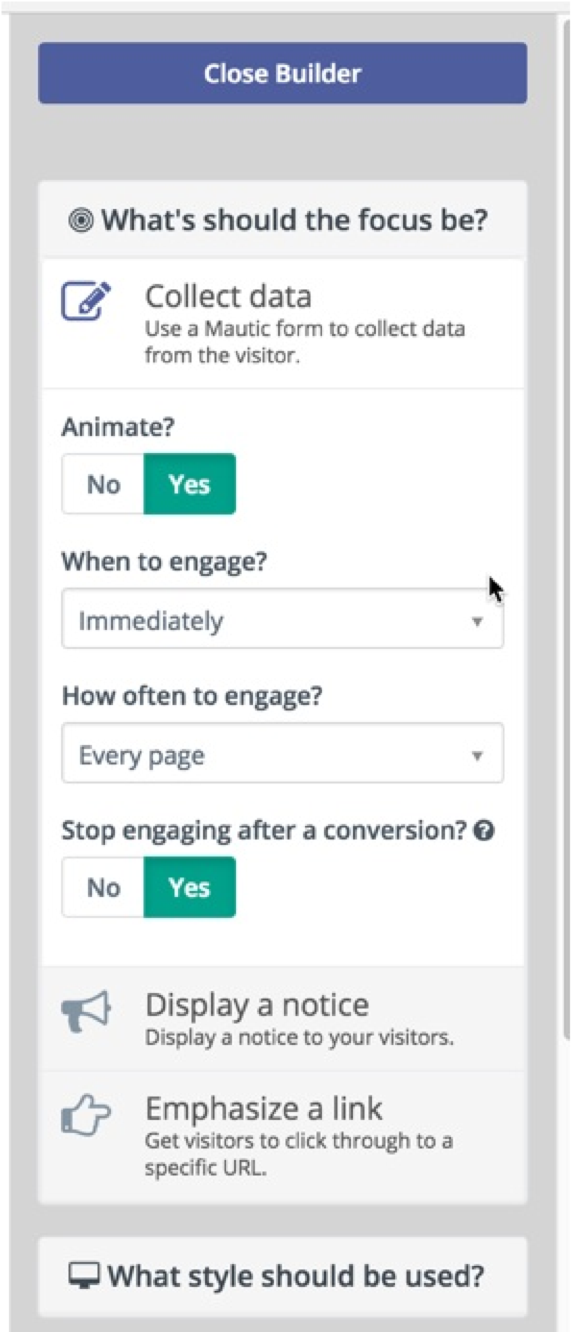
On the left, you'll see a button to switch between mobile and desktop views. A mobile snapshot is also attempted - it may not match your website exactly due to the snapshot process but it should at least give you the general look. On the right is the builder toolbar.



Focus/Goal

The first step to building the focus item is to choose what the focus or goal is. There are three options:

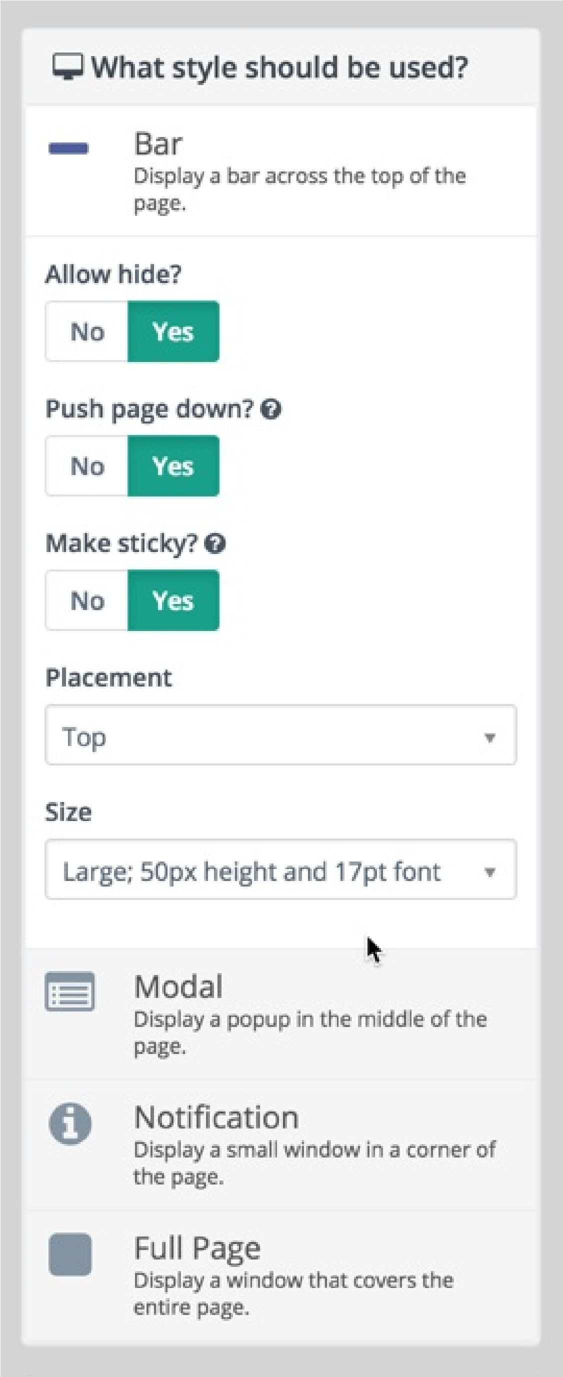
1. Collect data - will use a Mautic form in the output as the content. Note that it should be a very simple form (One or or two inputs) as there is very little room to work with in some of the styles. But this is great for capturing emails for a newsletter signup.
2. Display a notice - information only and is great for announcements and the like.
3. Emphasize a link - great for landing pages with an event, sale, promotion, etc. It displays a button to click that will direct to the given link.



Each focus/goal will have slightly different settings but all have a few in common:

1. Animate? - simply determine if
2. When to engage - this determines when the focus is engaged based on visitor interaction. It can be immediate, on scroll, timed, or with an exit attempt. If `Visitor intends to leave` is chosen, an option appears that allows configuration if links within the site should trigger the engagement or not.
3. How often to engage - should the visitor be engaged every time, once per session, or during a period of time?
4. Stop engaging after a conversion - once a user clicks the link or submits the form (not applicable for displaying a notice), enabling this option will no longer engage the visitor.

Focus Style

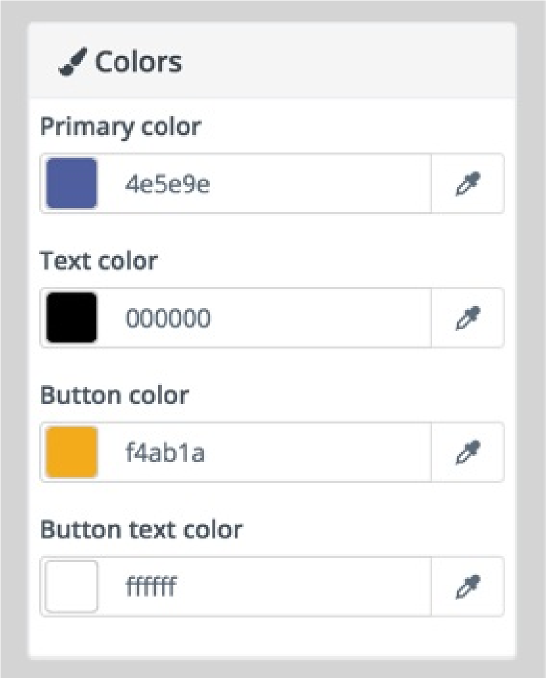


There are four styles supported -

1. Bar - display a bar across the top or bottom of the page
2. Modal - a small modal window that appears centred on the page
3. Notification - these are like modals but smaller and slide in from the side.
4. Full page - also like a modal only it takes up the entire view.

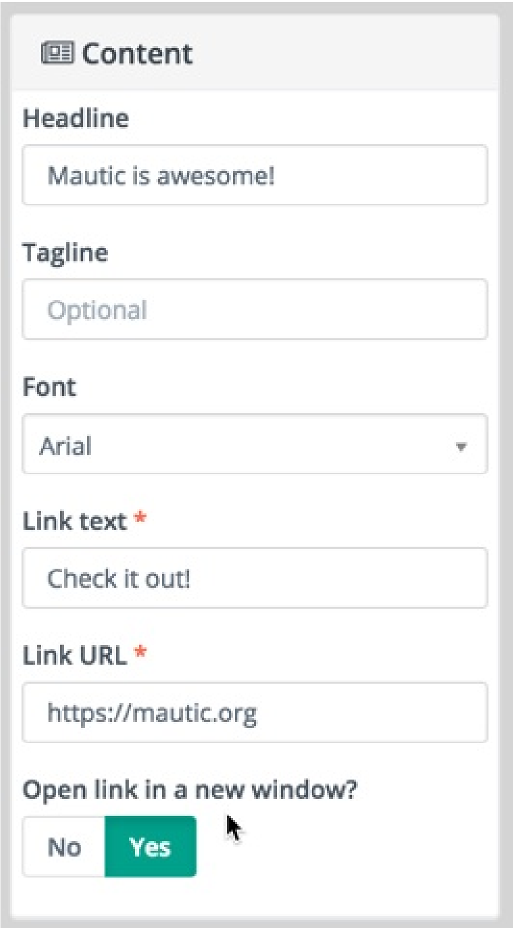
Each style has its own settings such as position, size, sticky, etc.

Colors



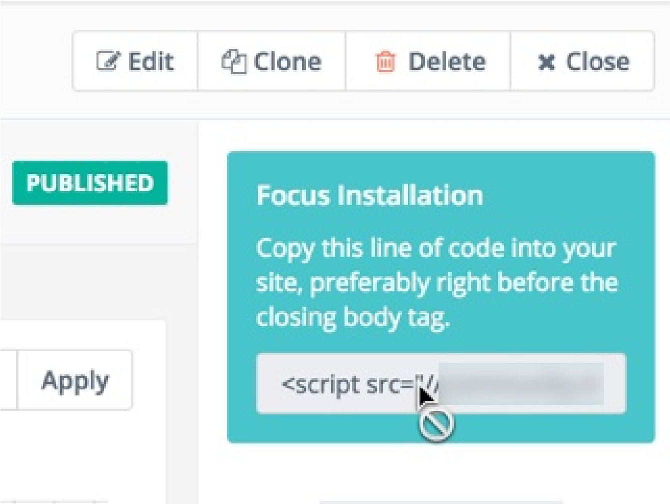
By default, Mautic will determine the top colors extracted from the snapshot. Four colors are currently supported for primary color, text color, button color, and button text color.

Content



Again this will vary based on the selected focus/goal and style is chosen. Some support a headline and a tagline while some support only a headline due to space constraints. If the goal is to collect data, a list of forms will be available to choose from. Remember that the form should be simple.

Inserting focus into a website



Inserting a focus item into a website is as simple as copying one line of code and inserting it into your page's source. After creating the focus item, view its details page where you can see engagement graphs and other detailed information. On the right, you'll see a "Focus Installation" box that includes the line of code needed. Click on it, copy, then paste it into your website's source before the closing body tag if possible.

Mobile Notifications

Mobile notifications integrate your iOS and Android app with One Signal. Using your own OneSignal accounts, you can now push a notification to your contacts's mobile device (with their permission). Enable these in Mautic's configuration to see them listed under Channels in the menu.

For more information see One Signal iOS documentation and One Signal Android documentation

Setup

iOS Code for OneSignal integration

To enable push notifications in your iOS app, add the following code (or a variant of it) inside of your `application` func of `AppDelegate`. The code examples below use Swift 3.1. Please modify them to your needs if you're using C#.

```
// Somehow determine the user email. If you have user accounts, it may be better to move
// this outside of the `application` func of `AppDelegate` in order to determine the user email.
// In this example, the address is hardcoded for ease of use.
let userEmail = "you@domain.com"

OneSignal.initWithLaunchOptions(launchOptions, appId: "YOUR-ONE-SIGNAL-APP-ID")
OneSignal.syncHashedEmail(userEmail);

OneSignal.idsAvailable({(_ userId, _ pushToken) in
    let pushId      = userId != nil ? userId : ""
    let pushEnabled = pushToken != nil ? true : false
    let userData    = UserData(email: userEmail, push_id: pushId!, enabled: pushEnabled)

    self.pushUserDataToMautic(userData, "https://dev.mautic.com/notification/appcallback")
});
```

For ease of use, I've created the following struct and func for sending user data to Mautic. Create this struct in your app, and import it where appropriate.

UserData struct

```
struct UserData {
    var email   = String()
    var push_id = String()
    var enabled = Bool()

    static func toJSON(_ userData: UserData) -> String {
        let email   = userData.email
        let pushId  = userData.push_id
        let enabled = userData.enabled

        return "{\"email\":\"\(email)\",\"push_id\":\"\(pushId)\",\"enabled\":\(enabled)}"
    }
}
```

pushUserDataToMautic func

This is a basic function for pushing the UserData struct to your Mautic installation. It will push the user data, and then display the response from Mautic as an app alert. Modify to meet the needs of your app.

```
func pushUserDataToMautic(_ userData: UserData, _ url: String) {
    var request = URLRequest(url: URL(string: url)!)
```

```
    request.httpMethod = "POST"

    let postString = UserData.toJSON(userData)
    request.httpBody = postString.data(using: .utf8)

    let task = URLSession.shared.dataTask(with: request) { data, response, error in
        guard let data = data, error == nil else {
            // check for fundamental networking error
            return
        }

        if let httpStatus = response as? HTTPURLResponse, httpStatus.statusCode != 200 {
            // check for http errors
            return
        }

        // Comment the next 4 lines to remove the alert
        let responseString = String(data: data, encoding: .utf8)
        let alert = UIAlertController(title: "Response Data", message: responseString, preferredStyle: UIAlertControllerStyle.al
        alert.addAction(UIAlertAction(title: "OK", style: UIAlertActionStyle.default, handler: nil))
        self.window?.rootViewController?.present(alert, animated: true, completion: nil);
    }
    task.resume()
}
```

Android Code for OneSignal integration

Coming soon...

Notification Stats

In addition to the UserData that gets pushed to Mautic, you can push open / interaction stats to Mautic by sending the UserData struct, with an appended `stat` JSON key.

Text Messages

This new channel was added in Mautic 1.4.0. It allows Mautic to send SMS from Campaigns.

Configure Text Messages

Before you start to send SMS from your Mautic, it needs to be connected to the service which can send them. The first and default implemented service is Twilio. In order to configure the Text Messages correctly, follow these steps:

1. Create an account at Twilio.com.
2. Go to *Account Settings*. There you'll see the *API Credentials*.
3. Open the Mautic Configuration in another browser tab and navigate to: Cog icon > Configuration > Text Message Settings.
4. Copy the *AccountSID* from Twilio account and paste it to *Text Message Provider Username* field in Mautic.
5. Unlock and copy the *AuthToken* and paste it to *Text Message Provider Password* field in Mautic.
6. Go to *Products* > *Phone Numbers* in Twilio, copy the number and paste it to the *Sending Phone Number* field in Mautic.
7. Select the *Text Message Enabled?* switch to *Yes* and save the Mautic configuration.

Create a new Text Message

A Text Message can be created/modified only via Campaign Builder.

1. Go to *Campaigns*.
2. Edit an existing campaign or create a new one.
3. Open the Campaign Builder.
4. Drag the *Send Text Message* action and drop it to the canvas.
5. Click the *New Text Message* button. The form in a new browser window will appear.
6. Fill in the *Internal Name*, *Text Message* and if required, change the language. Save it.

The new Text message will be pre-selected so you can save the *Send Text Message* action as well. You can use the action in your Campaign dripflow.

Mautic - Twitter plugin

This plugin can:

- send a personalized tweet to a contact
- display the tweets for a contact with valid Twitter handle,
- load additional information from the Twitter profile,
- place a share button to the landing pages.

Requirements

- Mautic installed on a publicly accessible URL. This plugin won't work on a localhost because callbacks from Twitter to Mautic are necessary.

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 written in the Twitter plugin configuration.

When your Twitter app is created, copy the *API Key* to the *Client Key* field in Mautic's Twitter configuration and *API Secret* to *Client Secret* field. Click the *Authorize* button.

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

Configure the plugin

If your Twitter plugin is authorized correctly, you can configure the *Features* and *Contact Field Mapping* tab in the plugin configuration. The *Features* tab is self-explanatory. The fields like *Tweet text*, *Via*, *Recommended* and *Hashtag* are prepared there for future implementation with Twitter. Read here how to configure the *Contact Field Mapping*. If you don't have a special field for Twitter handle yet, create it in the Contact Field section.

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 `{sharebuttons}` token in the Mautic Landing Pages in the place where you want to display the share buttons.

View contact's tweet

When you have the Twitter plugin authorized and configured, you will be able to see contact's tweet history in the contact's detail page. But it will work only for contacts which have the Twitter handle (username) filled in their profile. See the limitations section below for more about that.

Tweet to a contact

It's possible to tweet to a contact from a campaign. Either there is the special "Tweet contact" action where you can select the tweet which should be tweeted or you can use Marketing Messages Tweet channel to do the same thing.

The tweets can be tailored to the contact with tokens:

- `{twitter_handle}` will be replaced with Twitter Handle (username) from the contact's profile and so the contact will get Twitter notification about the mention.
- `{assetlink=2}` will insert a link to the Asset with ID 2.

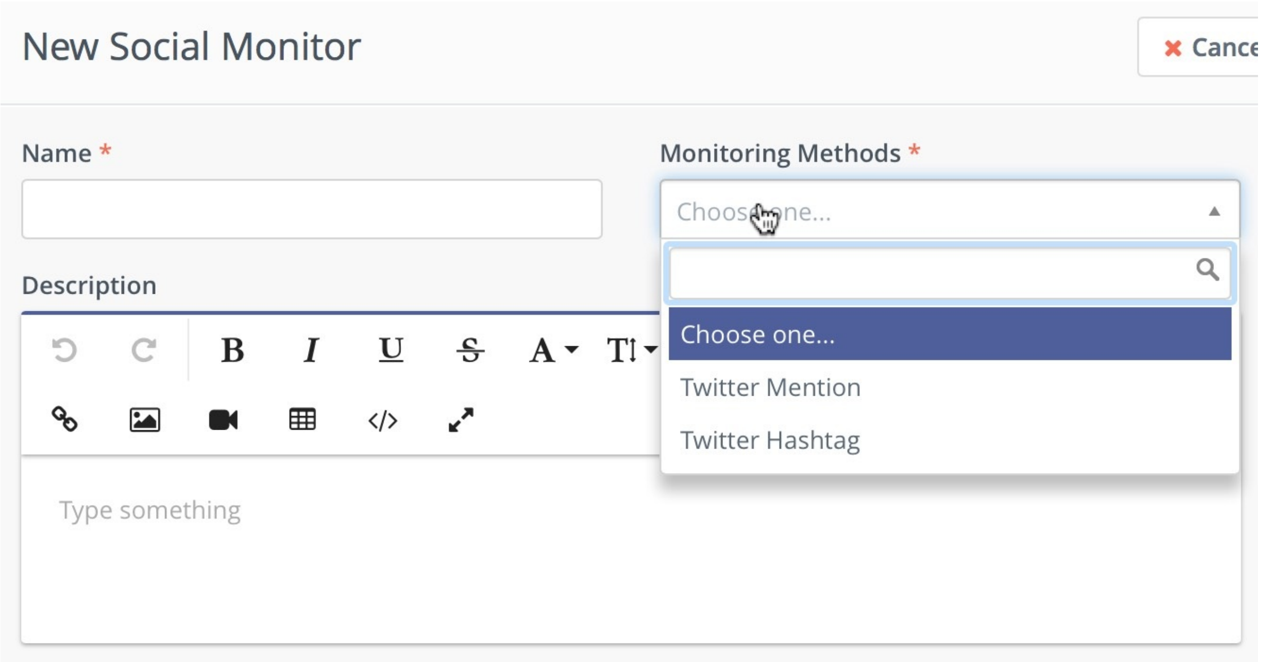
- `{pagelink=1}` will insert a link to the Landing Page with ID 1. All these tokens are easily accessible in the UI, so you can just click a button or select the Asset/Landing Page you wish to include to the tweet.

Twitter API limitations

The original idea was that Mautic will search for additional information about a contact in various social platforms. But since the time the social plugins were written, social platforms restricted the API search only to the username.

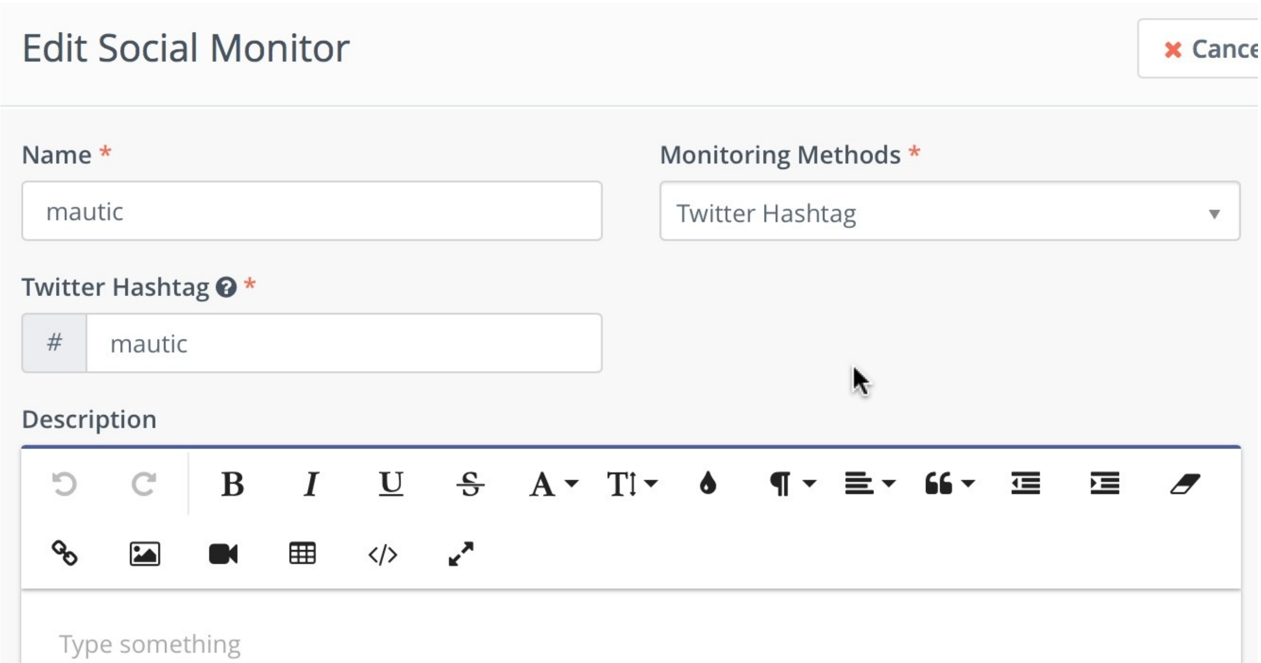
Social Monitoring

It's possible to add contacts to Mautic through monitoring Twitter for mentions and hashtags.



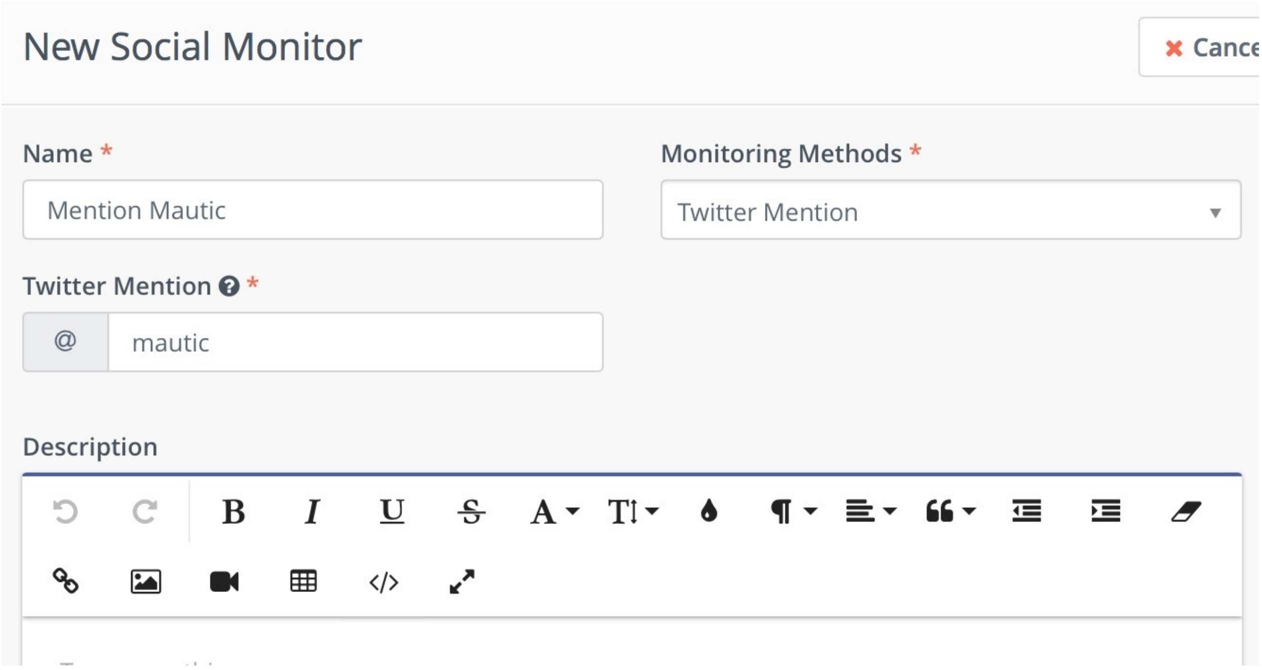
Hashtags

Go to Channels->Social Monitoring and click New. Select Twitter Hashtags as the Monitoring Method. Type the hashtag you wish to monitor in the Twitter Hashtag box. Name the monitor and click save.



Mentions

The process is the same for Twitter mentions.



As people use the hashtag or mention that you're monitoring, you'll see them being added to your contact list. From there you can use that information in a Campaign.

NOTE : You may configure the Twitter plugin and setup the social CRON to make it work. More information about Twitter plugin

Campaigns

Campaigns are central to creating an automated workflow to assist with your marketing efforts. Campaigns consist of various external points of contact which will engage your contacts. These engagements can be created to occur on predefined time intervals or in response to specific contact actions.

Time Driven Campaigns

The concept of time driven campaigns implies a form of campaign which centers around specific timed events. These events are most usually in the form of emails. These email events can be defined to be triggered after a delay of a predefined number of days or on a specific date in the future.

Contact Driven Campaigns

A second type of campaign is the contact driven campaign. These are campaigns which trigger events based on interactions from the contact. These can occur as a result of the contact landing on a certain page, opening an email, spending a specified amount of time on a website, or any number of other activities. The response to these actions would be an email sent either immediately or at some point in the future.

Mixed Campaigns

Obviously you are not limited to creating either one kind of campaign or another separately. Mautic allows you to create campaigns which consist of both time driven items as well as contact driven actions. This powerful mixed campaign means actions will be driven by both specific dates or after specific timeframes as well as actions taken by a contact directly (as mentioned above).

Campaign Actions

Email actions have been mentioned specifically as a particular use case, however there are many other responses the system can take. Other actions can include automatic assignment to a new segment, assigning a new point value, or an integration into a CRM or other system.

Campaign Automation

One of the main benefits of this campaign workflow process is the ability to predefine these workflows and have them respond automatically to your contacts and timelines. This automation minimizes the amount of time required for manual contact activity and improves reliability of contact nurturing through consistent contact.

Manage Campaigns

Campaign Overview

The campaign overview will show you many details of your campaign including the number of contacts which have been added to a campaign, the number of emails sent, and the number of page views resulting from the campaign.

Additional information includes a quick overview of what decisions and actions are available on a campaign, as well as a grid layout overview of all the contacts on a campaign.

As with many of the other overview screens you can view the recent activity taken place on the campaign.

Basic Campaign Creation

Creating campaigns is an easy process which involves picking a name, creating a description, and defining the segments to associate with the campaign. These campaigns can then be assigned a category and defined publishing information. All of these are rather standard aspects of a new campaign creation.

Note: The segment selection will only show public segments. This means any segments created by individuals within the company marked as private will not be available for campaigns.

Advanced Campaign Creation

The basics of campaign creation are handled easily by the initial screen but the finer details of building a campaign occur within the campaign builder. This might be considered advanced campaign creation but every campaign does need to use the campaign builder.

Executing Campaign Actions

Executing starting actions for contacts newly added to the campaign, scheduled actions and the actions on the "non-action" decision paths, must be triggered by the system. To do so, create a cron job that executes the following command at the desired interval:

```
php /path/to/mautic/app/console mautic:campaigns:trigger --env=prod
```

If you want to execute the command at different intervals for specific campaigns, you can pass the `--campaign-id=ID` argument to the command.

Building Campaign Contacts

Batch adding/removing contacts for campaigns is done by using the following command:

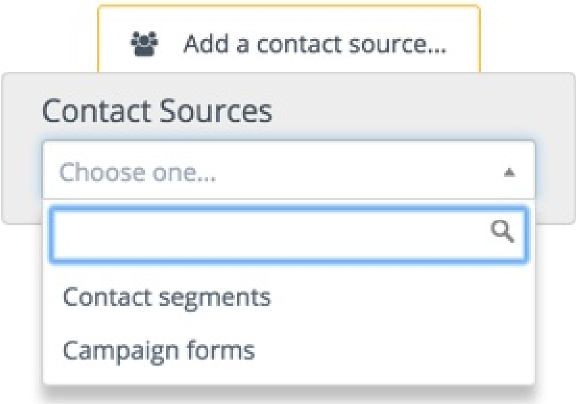
```
php /path/to/mautic/app/console mautic:campaigns:update --env=prod
```

Campaign Builder

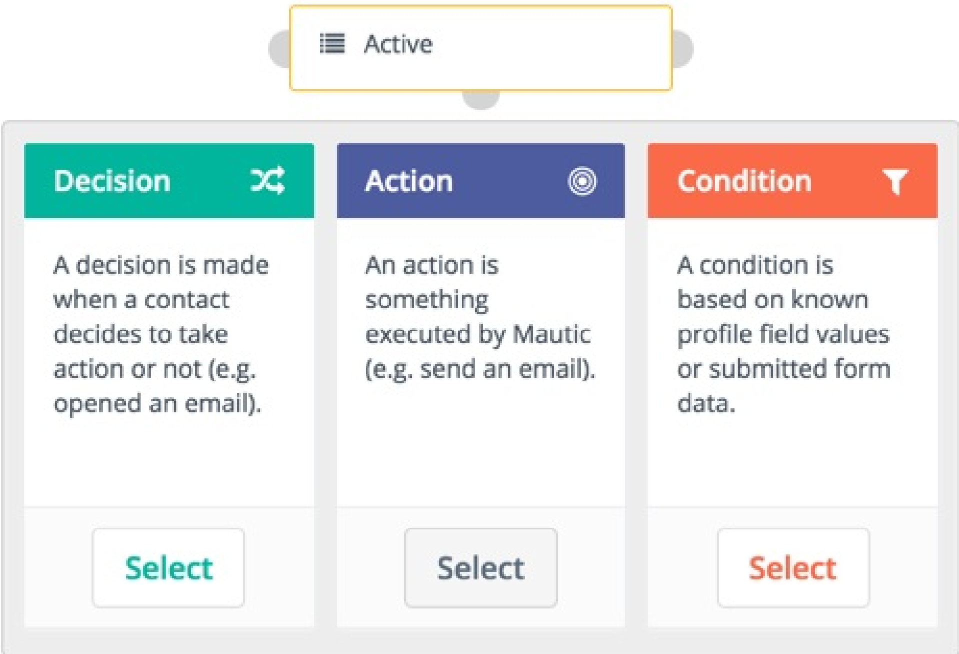
The Mautic campaign builder gives you a blank canvas upon which to build your campaign workflow. The overall interface is clean and simple with easy to use events. These actions, decisions, or conditions can be added through clicking the "anchors" of events.

Sources

The first thing to be selected is where the campaign will pull in contacts from or contact sources. There are currently two options for contact sources: segments and forms. One or both can be added to the campaign.



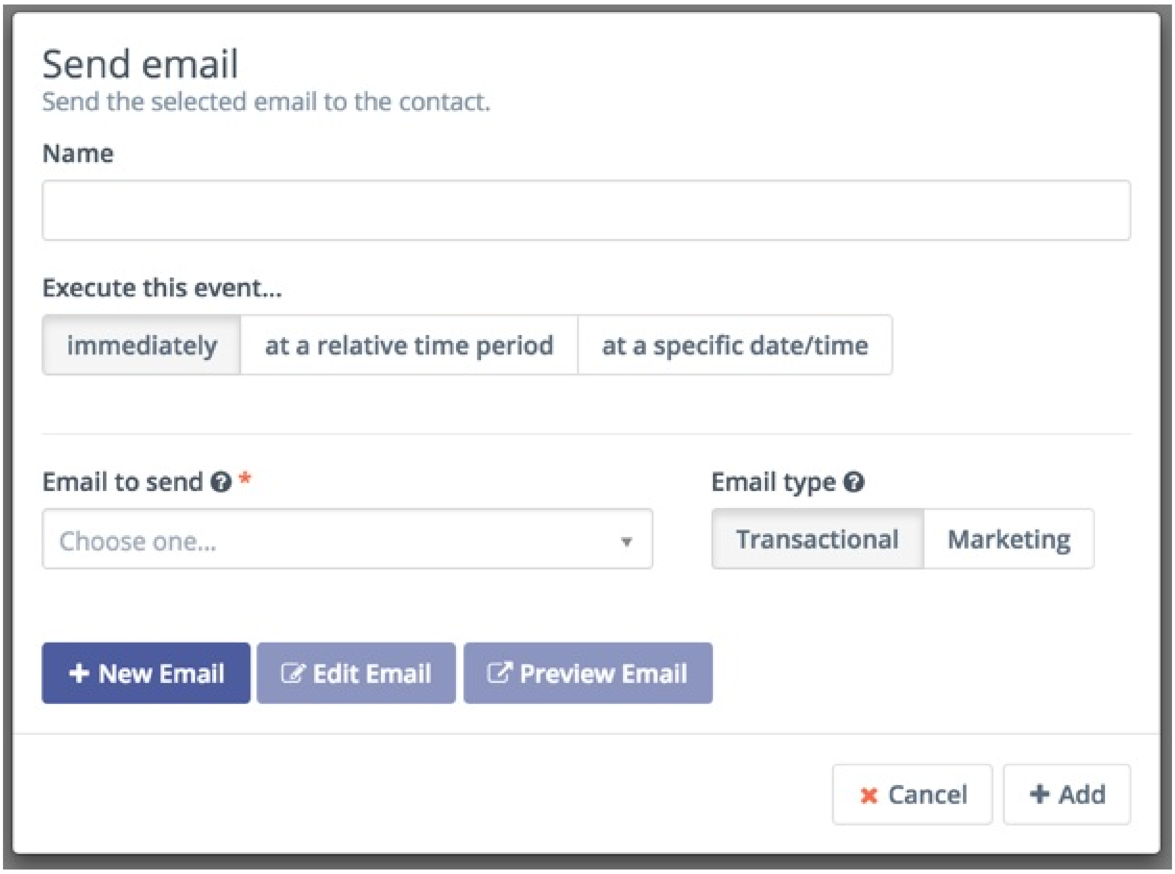
After selecting one or more sources, the next step will be to add one or more actions (most likely), decisions and/or conditions:



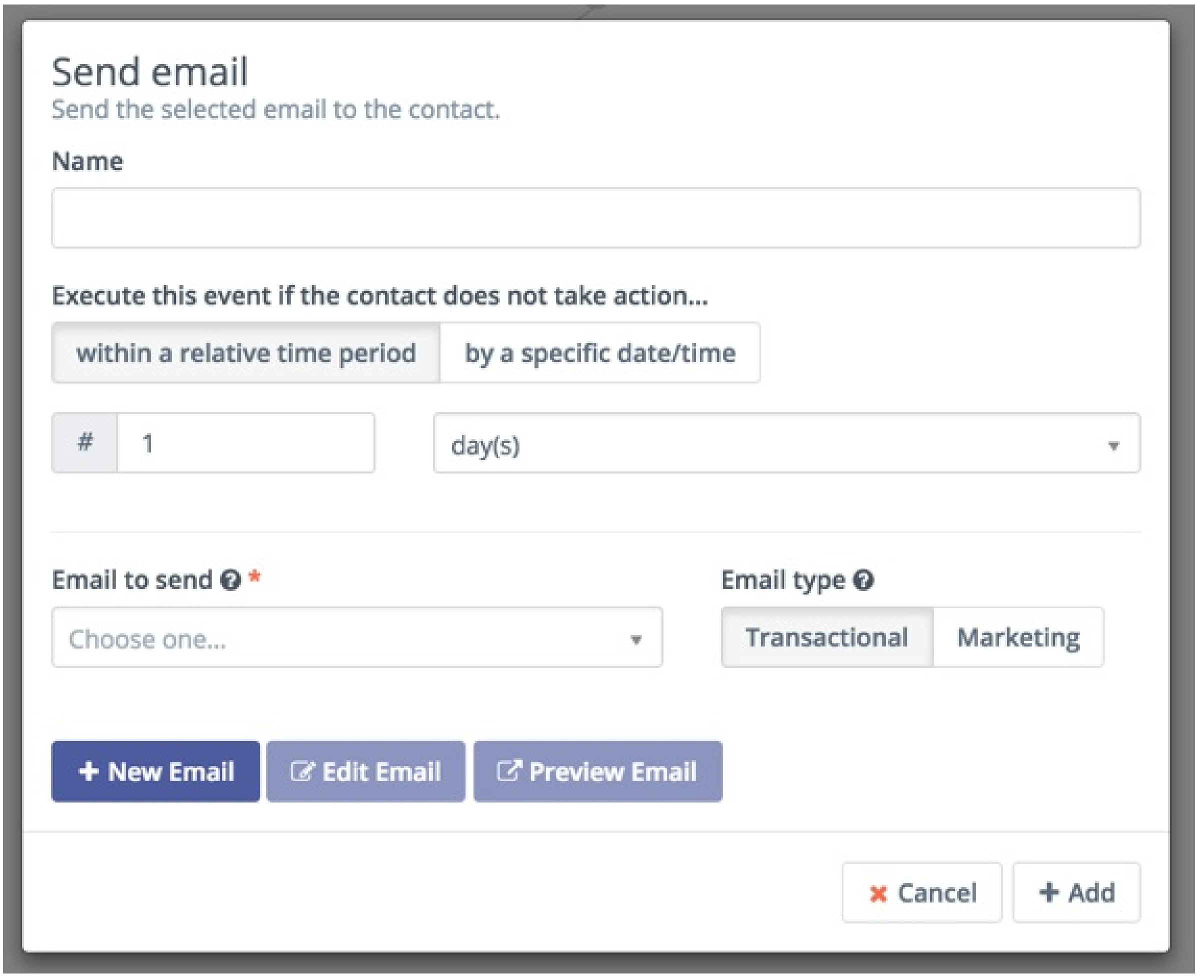
Actions

Campaign actions are those items which are initiated by you. These are items which you will control and which affect your contacts involved in the campaign. Examples of these actions are adjusting a contact's point totals, moving a contact to a different campaign, modifying the segments a particular contact is a part of, and lastly but perhaps most importantly sending of an email.

When you create a campaign you will select one of these actions to begin the workflow. In most cases this initial step will be an email sent to your segments.



You will notice that when you add an email to a campaign you will be able to select a potential *delay* for when the email is delivered. If the action is attached to a decision's non-action initiated decision path, the delay becomes how long the contact has to take action before the campaign progresses down the non-action path.



After you have added an action you will more than likely place a decision on the campaign.

Decisions

Decisions are actions which are initiated by the contact. These decisions can be either directly initiated or implied based on non-action. Samples of these decisions are downloading an asset, opening an email, submitting a form, or visiting a landing page.

Decisions are taken in response to an action and as such a decision has two outcomes.

These two options are demonstrated by the green and red decision points on the decision. Each path can then be handled by your campaign. This process is typically referred to as a **decision tree**.

It is important to note that a contact must already be part of the campaign in order for it to recognize the decision executed. Therefore, campaigns should never start with a decision unless you are manually managing the contacts assigned to it and the decision is expected to be executed at a later time.

Contact-initiated Decision Path (Green Points)

Actions attached to the green point of a decision are considered contact-initiated points.

The contact-initiated decision path is taken as a result of a contacts direct action such as opening an email or submitting a form. Connected actions will be executed (or scheduled if a delay is set) at the time the contact took the action.

Non-action Initiated Decision Path (Red Points)

Actions attached to the red point of a decision are considered non-action points. This path is taken as a result of a contact NOT taking some direct action.

Use an action's delay settings to define at what point the campaign should send the contact down this path.

To trigger these events, see Executing Campaign Actions.

Example

To provide a simple example of a decision tree consider an email where the decision is to open an email. There are two outcomes, if the contact chooses to open the email then the green decision point connects to the next action to be taken in the campaign workflow. If, however, the contact does not open the email then you may desire a different action to be taken (e.g. a delay of 30 days then a second email sent).

Conditions

Conditions can be used to execute different actions based on a contact's data. For example, a condition can be configured to execute an action if a contact has an email or do something else if they do not.

The delay you set is ran before checking the condition no matter the delay you add on the connected actions. It will not wait the delay on the connected action to check the status of the condition to qualify the contact into the positive or negative path of the condition.

Currently there are 2 types of conditions

1. Conditions based on Contact Field Value.
2. Conditions based on Form Field Value.

Positive status Condition Path (Green Points)

Actions attached to the green point of a condition are considered as positive status points. The status condition path is taken as a result of the condition at the end of the delay set (trigger, delay or specific date).

Negative status Condition Path (Red Points)

Actions attached to the red point of a condition are considered as negative status points. This path is taken as a result of negative status for the condition at the end of the delay set (trigger, delay or specific date).

Custom date field to trigger a campaign

In the condition based on a contact field value, select the required date field. After selecting it, select "date" as operator. Then select the required value from drop-down.

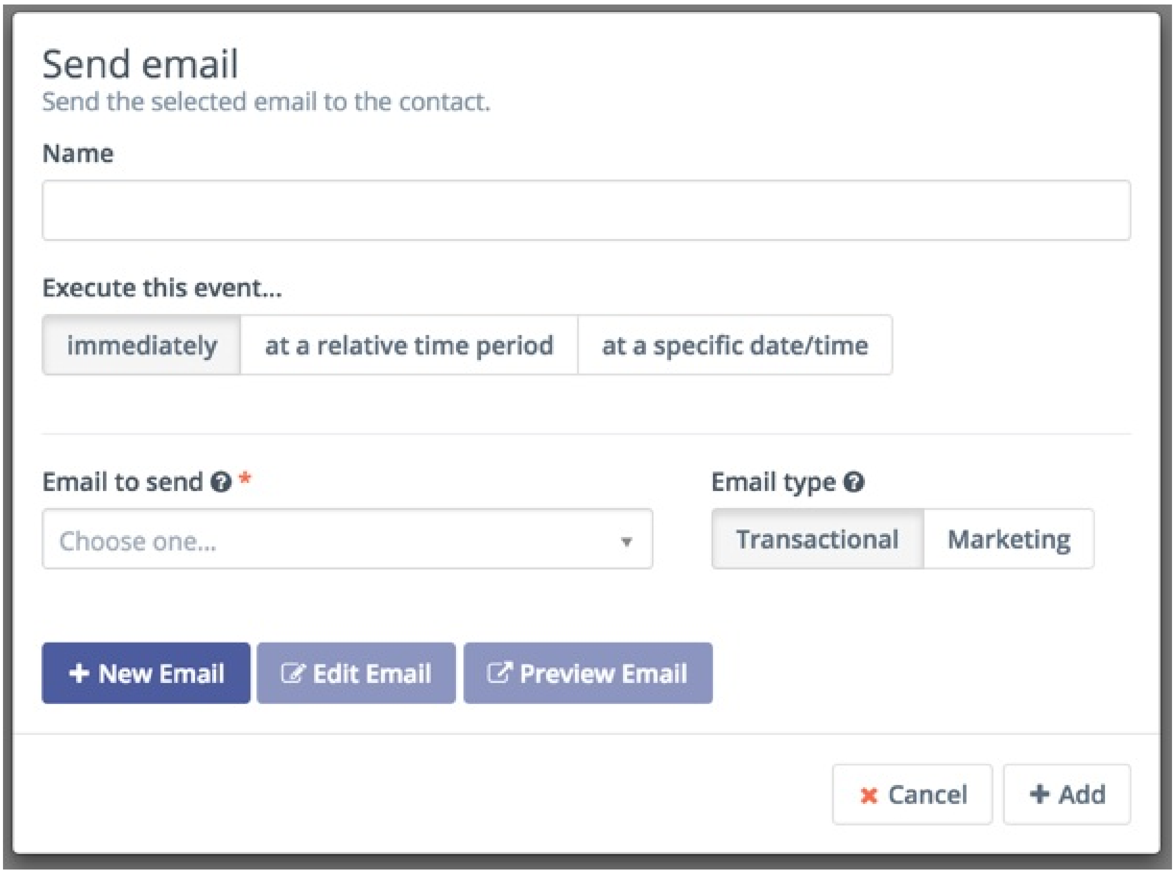
Note: In "Anniversary" option only day and month value of the field is considered.

Campaign Events

Below are notes on some of the specific campaign events.

Campaign Actions

Send Email - Marketing vs Transactional



In the send email action, there is an option to select Transaction or Marketing. A transactional email is one that can be sent to the contact multiple times. A marketing email is one that can only be sent to the contact once across multiple sources (e.g. another campaign). If the contact has already received this email from another source or the current campaign, the email will not be sent again and the contact simply progresses on through the campaign.

Delete contact

This action will **permanently delete the contact** who will trigger this action in your campaign flow, together with all the information Mautic knows about that contact. See in the segment docs about how to use this action to delete all contacts in a segment.

The Delete contact action is special for 2 reasons:

1. It will also delete the campaign event log record about that contact so this action will always show 0% progress in the campaign detail page. Even though it could have deleted some contacts. There is no record about it.

2. This action doesn't allow to connect other campaign events to it. There is no point in doing so since the contact won't exist after this action is triggered.

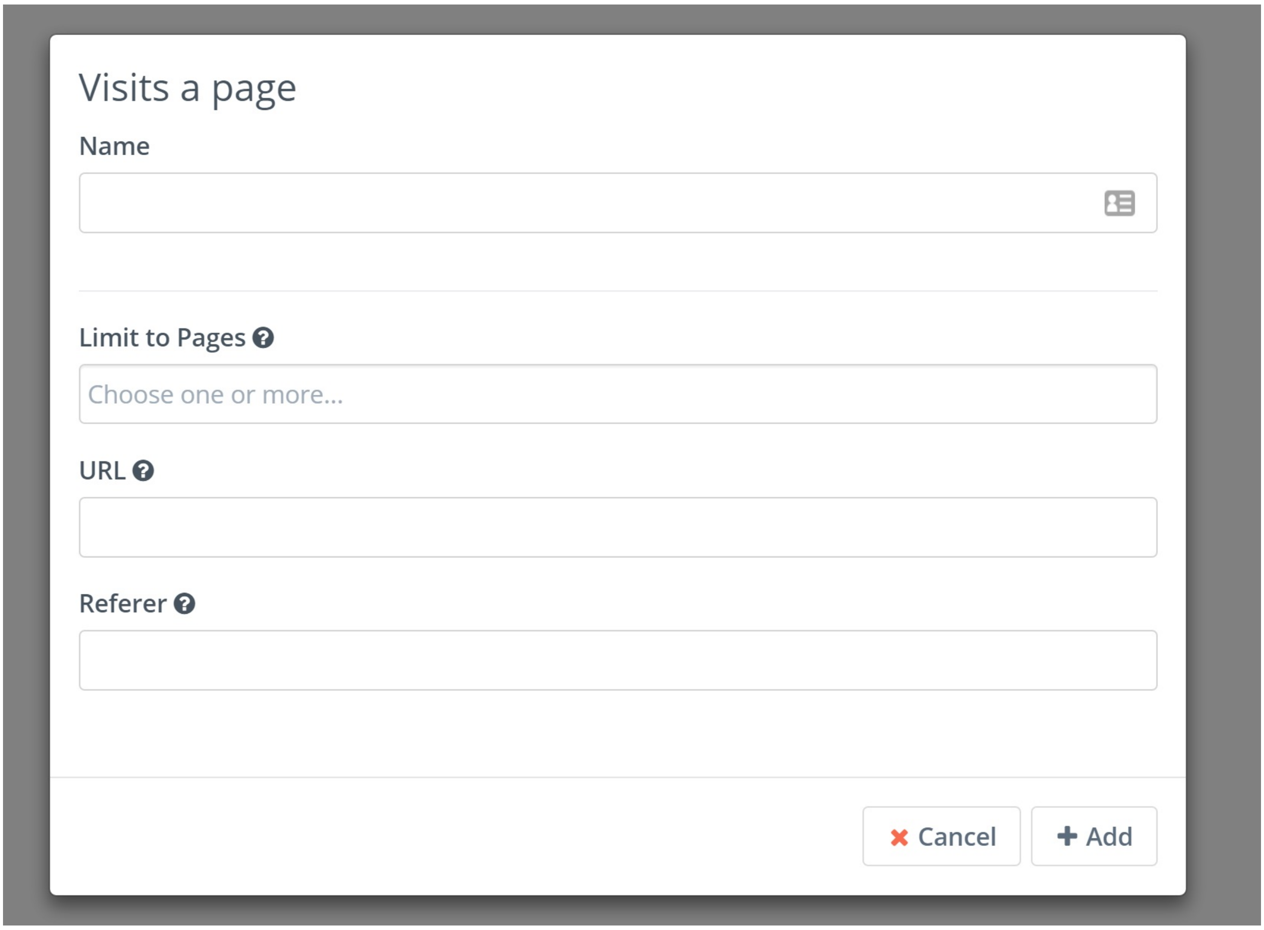
Campaign Decisions

Opens Email

The opens email decision can only be attached to a send email action. Whatever email is sent through the action is the email used by the decision.

Visits a page

Note: The decision uses the OR operator between fields (Limit to Pages, URL, Referrer).



Campaign Troubleshooting

Page visits are not recognized

There can be a few reasons for this:

1) Make sure that you are not testing the page visit while logged into Mautic. Mautic ignores user generated activity so use an anonymous session, another browser, or logout of Mautic.

2) Ensure the contact getting tracked is in the campaign. The easy way to test this is to review the time line of the contact for the page hit.

3) Campaigns are executed sequentially and will not repeat per contact. If the contact has already visited the page while part of the campaign and triggered the Visits a Page decision, subsequent visits will not re-trigger the actions associated with the decision.

4) Ensure that the URL in the campaign action either matches *exactly* the URL visited or use a wildcard (note that the a URL can include the schema, host/domain, path, query parameters, and/or fragment).

For example, if you have a URL of `http://example.com` and the page hit registers as `http://example.com/index.php?foo=bar`, the campaign decision will not be triggered. However, if you use `http://example.com*` as the URL, it'll match and thus trigger.

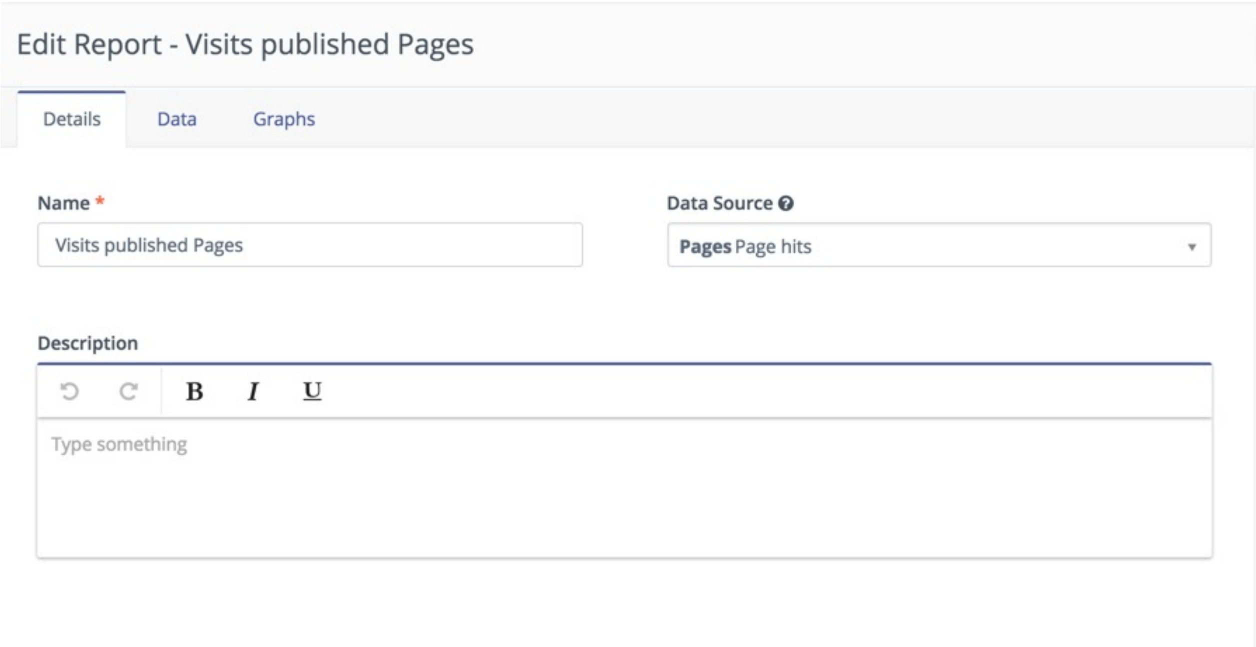
Another example is if you want to associate different page hits with specific campaigns. Let's say you have Campaign A and Campaign B. You want to use the same base URL and path for both campaigns but differentiate with a query parameter. For Campaign A, you can define a Visits a Page decision with `http://example.com/my-page?utm_campaign=A*` and for Campaign B, `http://example.com/my-page?utm_campaign=B*`. Now a contact will only trigger the specific campaign desired. If the goal is to trigger both campaigns regardless of the query parameters, use `http://example.com/my-page*`.

Reports

Highly customizable reports can be generated through Mautic's Report menu.

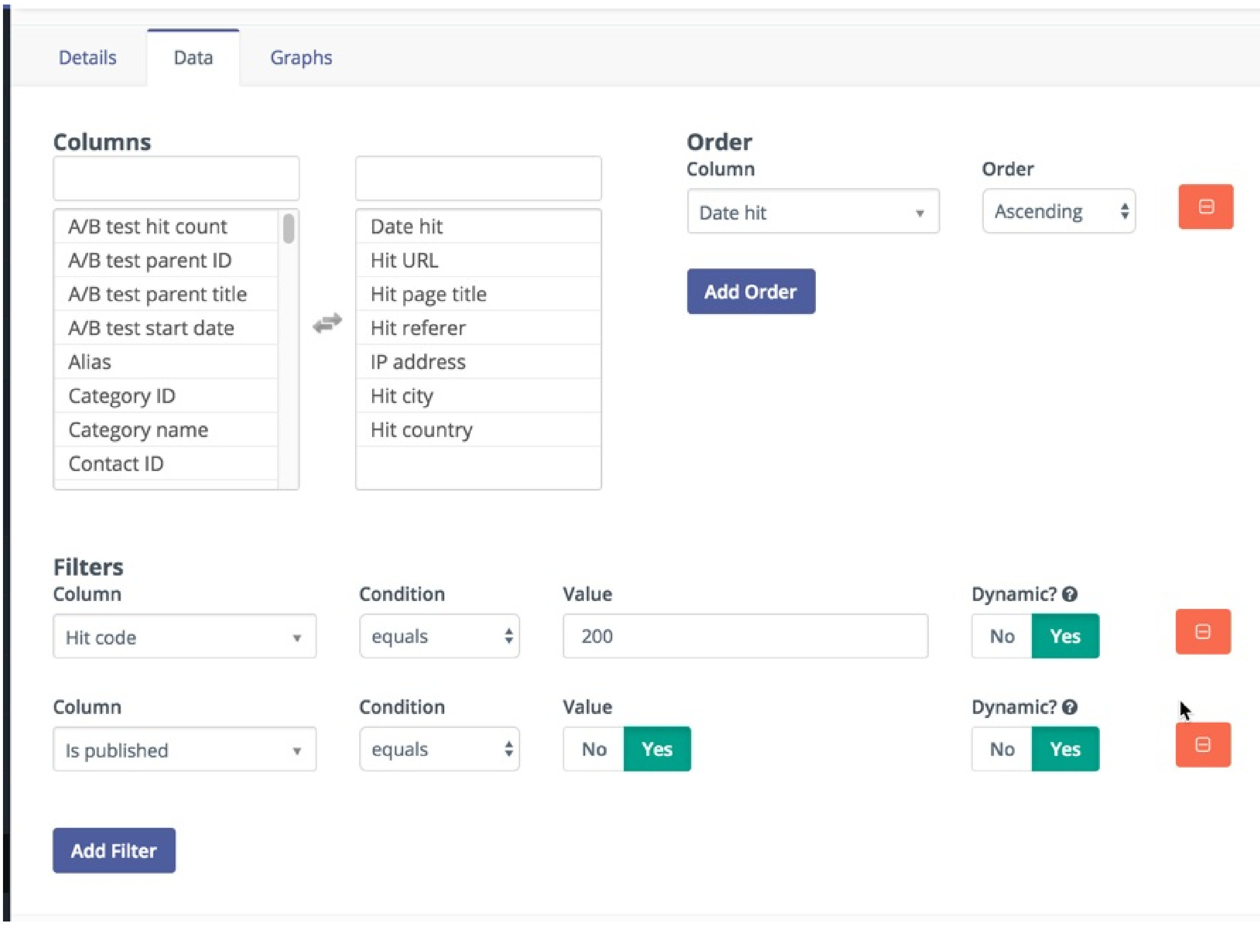
Data Sources

Choose the data source appropriate to the report you want. Each data source has a different set of available columns, filters and graphs.



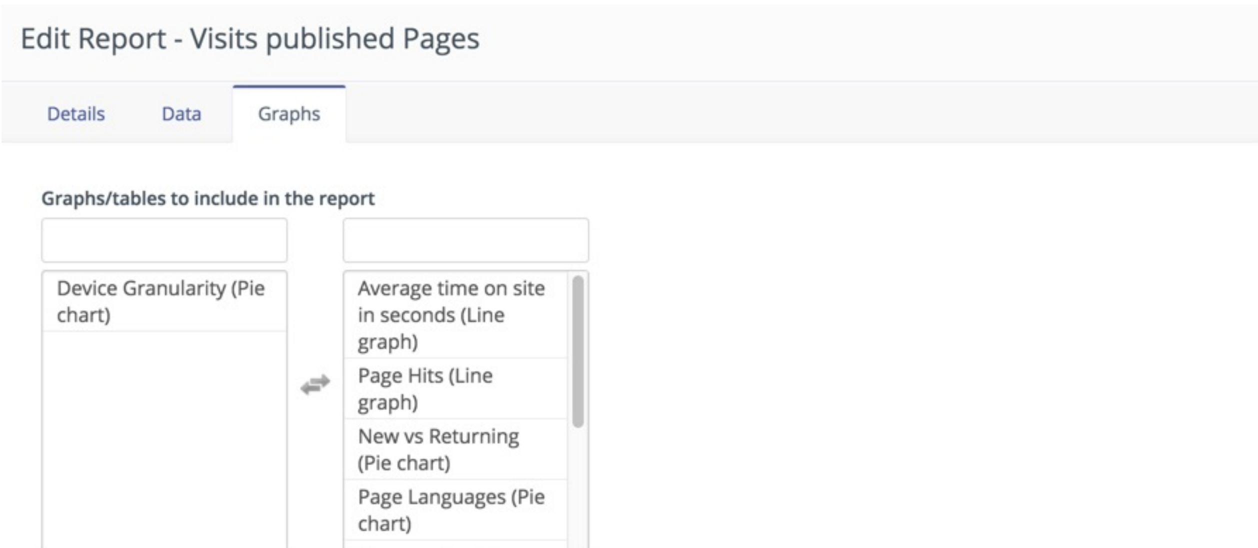
Configuration

Each report can be customized to include the columns of choice. Filter data based on set criteria and/or set a specific order for the data. In addition you can also group by and select different function operators to calculate fields. Note that when you select functions operators a totals row will be added to the report. This totals row will not be exported when selecting to export a report.



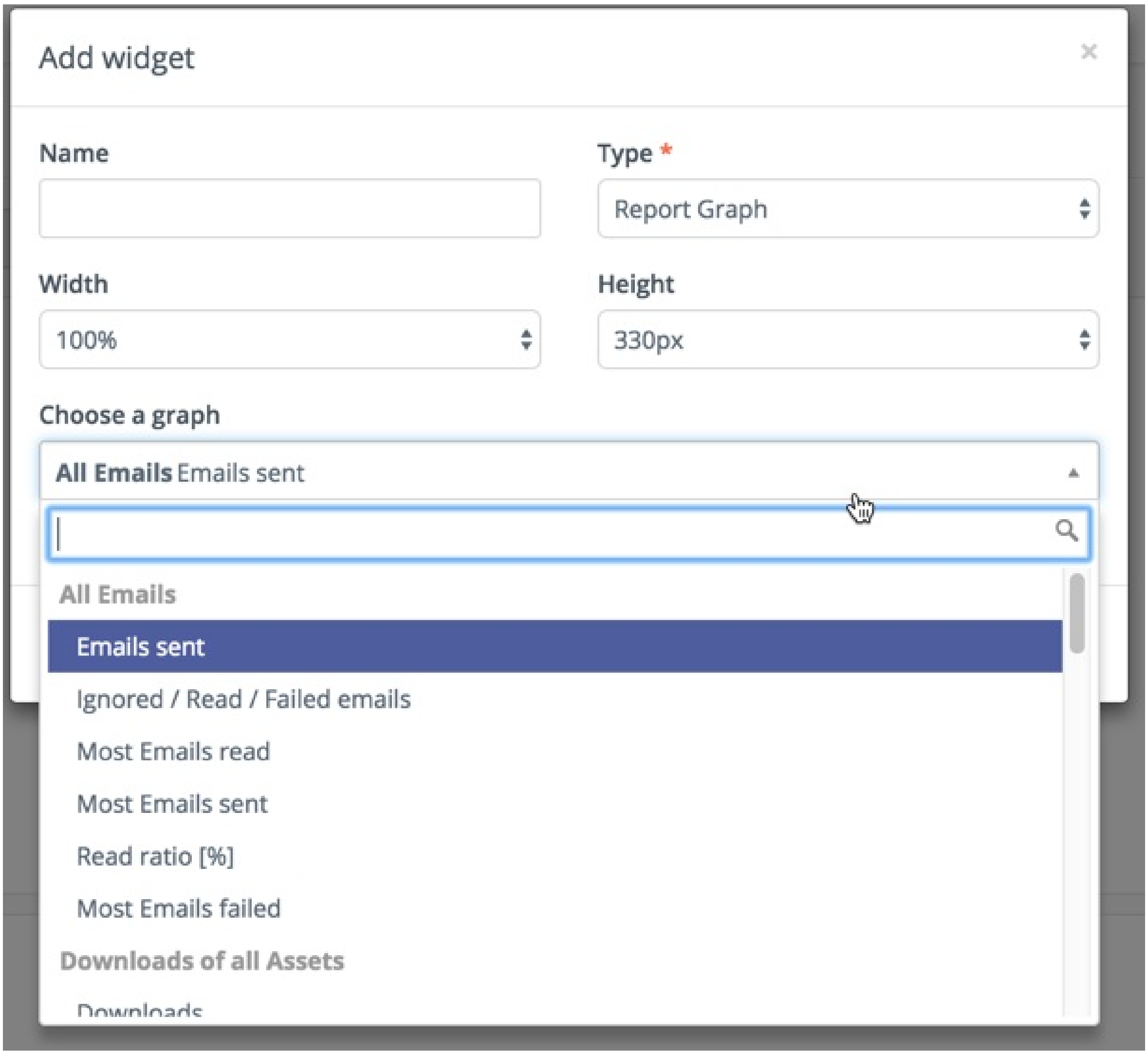
Graphs

Some reports have graphs available. Select the graph desired from the left list - it will move to the right and will be part of the report.



Dashboard Widget

Each graph of each report is made available as a widget on the dashboard allowing complete customization of the dashboard.



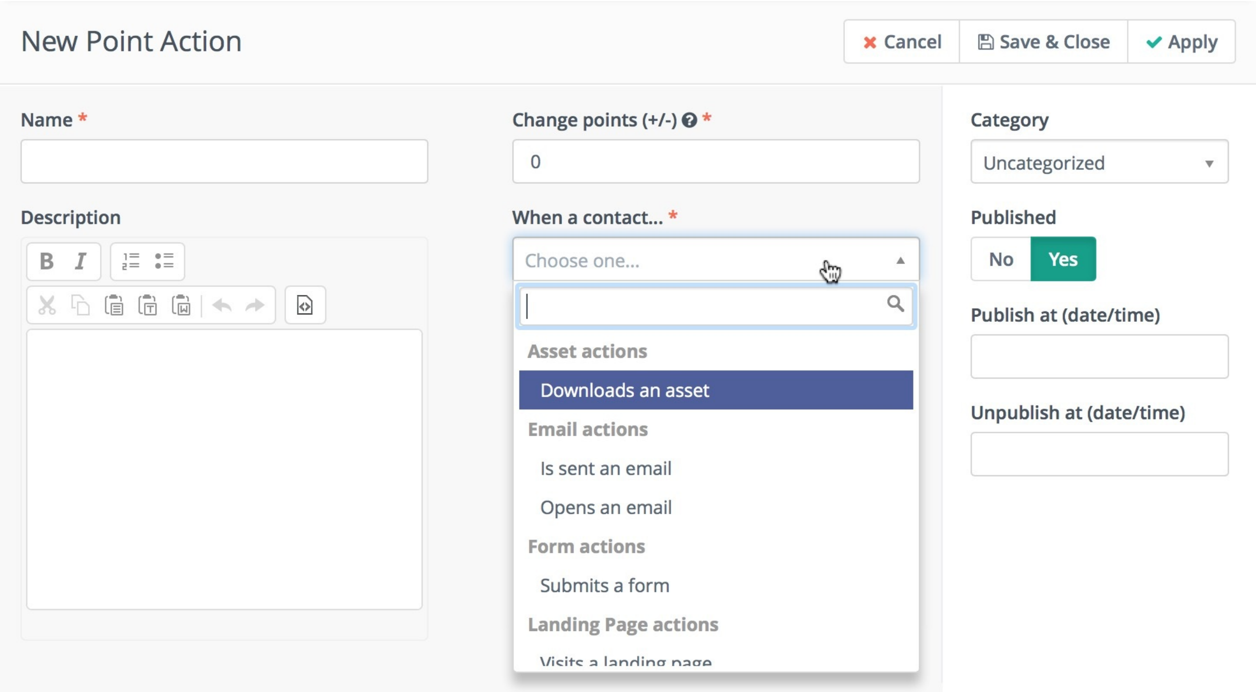
Points

Points provide a way for contacts to be properly weighted. These points have both triggers and actions. Each term will be properly defined and a thorough understanding of how points function will ensure that your overall marketing automation process is successful.

Point Actions

Point actions are those times when a contact receives a change in their point total. These actions can be either positive or negative point changes and are based on a particular action as you determine.

A partial list can be seen in the screenshot below.

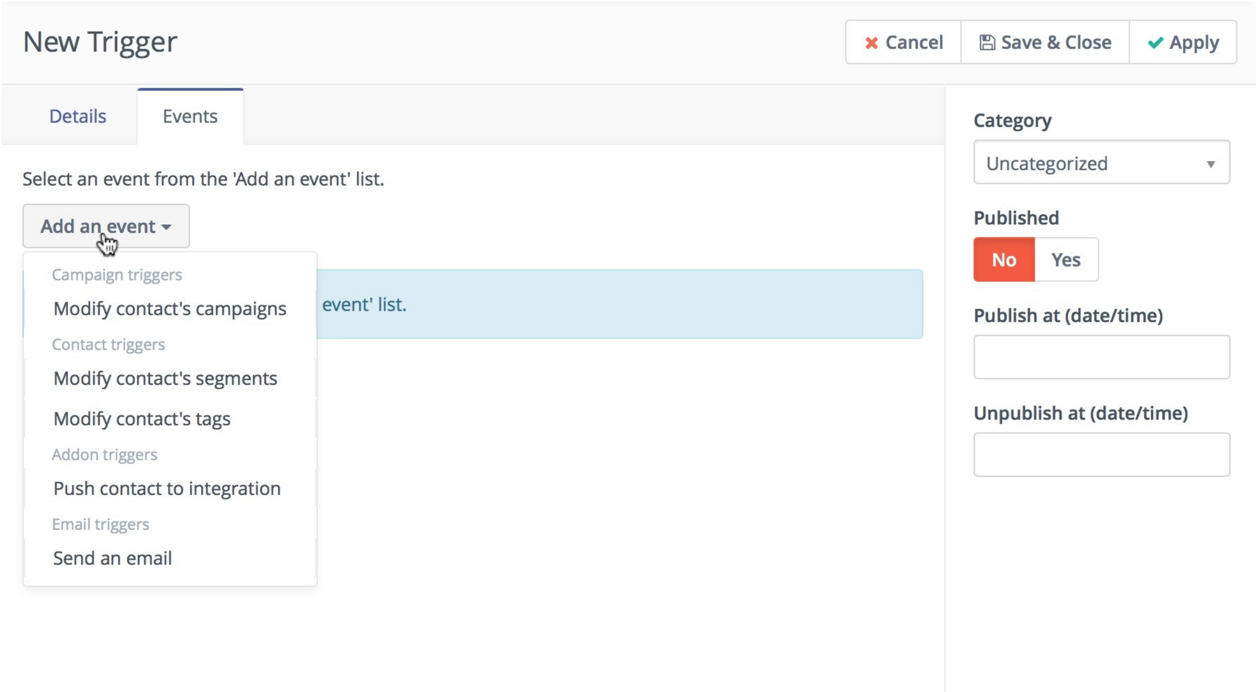


Clearly these actions can be expanded upon as needed. This is the essence of point actions. The other part of the points system are the triggers. They are defined next.

Point Triggers

Point triggers are resulting events which are fired based on the achieved point total of a contact. In simple terms, when a contact reaches a minimum number of points, the point trigger is fired and an action is performed.

When creating a point trigger you have the option to apply the trigger to all existing and applicable contacts as well as new contacts.



These point triggers and associated events are also fully customizable.

Points Troubleshooting

Page visits are not recognized

There can be a few reasons for this:

1) Make sure that you are not testing the page visit while logged into Mautic. Mautic ignores user generated activity so use an anonymous session, another browser, or logout of Mautic.

2) At this time, point actions are tracked once per contact. This means that subsequent visits will not re-trigger the action if already triggered once.

3) Ensure that the URL defined either matches *exactly* the URL visited or use a wildcard (note that the URL can include the schema, host/domain, path, query parameters, and/or fragment).

For example, if you have a URL of `http://domain.com` and the page hit registers as `http://domain.com/index.php?foo=bar`, the action will not be recognized. However, if you use `http://domain.com*` as the URL, it'll match and thus trigger.

Stages

Stages Overview

Stages is a way to define the lifecycle of a contact. Create stages based on your marketing stages, and move your contacts from stage to stage.

Creating/Managing a Stage

To create a new stage, go to the stages menu identified by a tachometer. Click on the new button and fill in with you relevant data.

Notice Mautic uses 'weight' for stages, this is a way to balance your contact's stages. When moving contacts from stage to stage, this will make sure a contact doesn't go back to previous stages.

Moving Contact's from stage to stage

Use a campaign to move your contacts from stage to stage. When creating your campaign choose a *Move Contact to Stage* action. So if a contact has been sent an email, or has opened an email, you can select to change the contac't stage based on any campaign criteria.

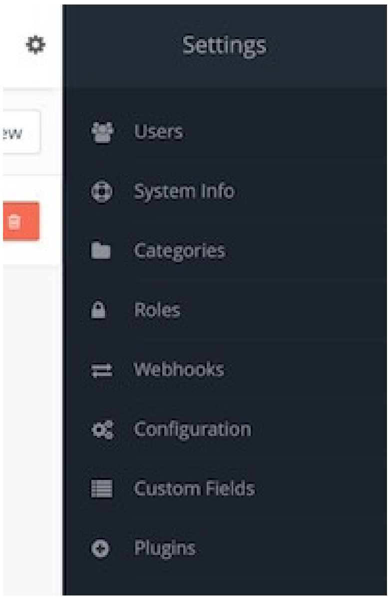
Contact's Lifecycle

Create a lifecycle widget in your dashboard based on segments to also view what stages contacts are in.

Plugins

Mautic plugins are installable packages which can extend Mautic functionality or connect it with another system. If you are interested in how to create a new Mautic plugin, read more about it in the developer documentation.

You can find the Plugins in the right admin menu.



Install plugins

If you are on a freshly installed Mautic instance, there is a chance that you don't have the default plugins installed yet. Click on the "Install/Upgrade plugins" in the top right corner and all the plugins should appear.

If you are trying to install a new plugin that did not come with the original Mautic installation files and it does not appear after you click on "Install/Upgrade" clear your Mautic cache and try "Install\Upgrade" again.

Citrix Plugins

Description:

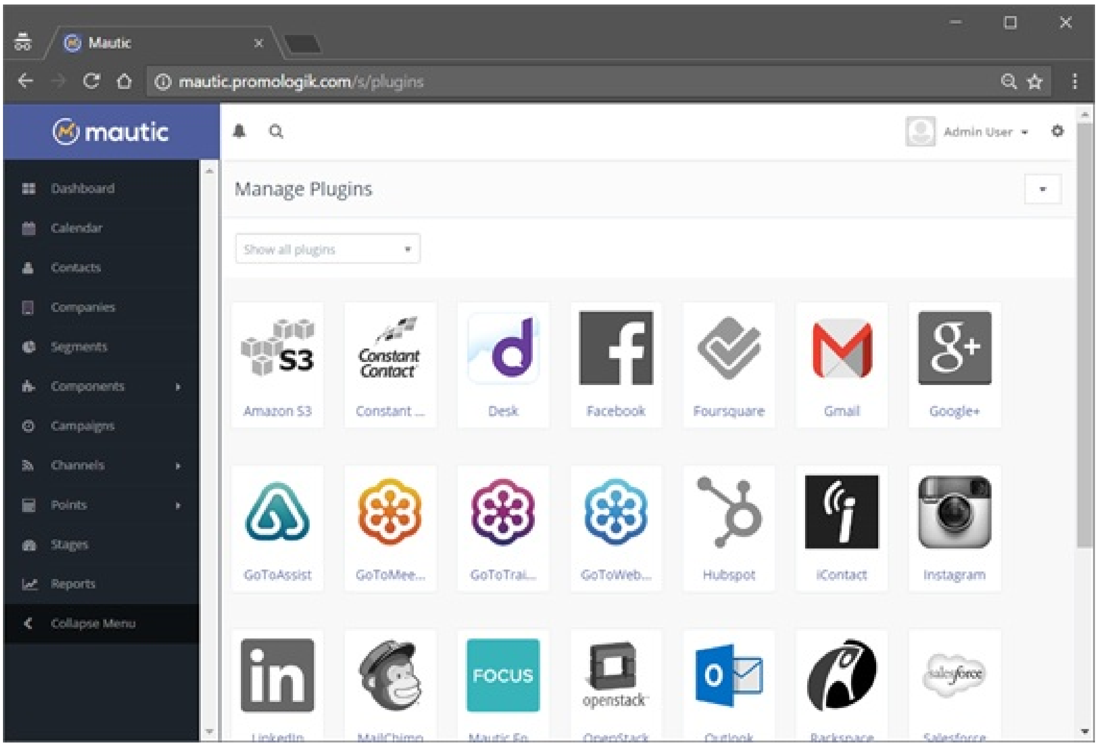
Creates a plugin that pulls data from Mautic and pushes data to Mautic from GotoMeeeting, GotoWebinar, GotoTraining and GoToAssist.

Required Features:

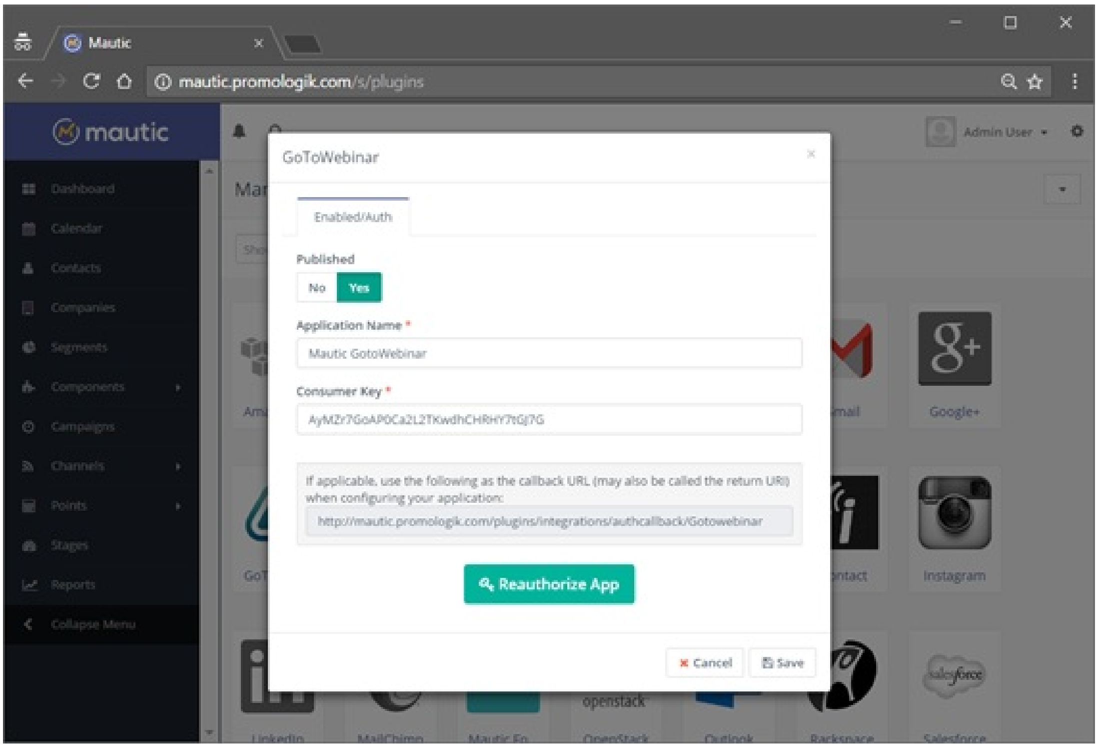
1. Create registrants in GoToWebinar and GoToTraining based on campaign decisions, contact data and also from registration forms in Mautic
2. Pull back from registrant and attendee info into segments and campaigns
3. Display webinar and training attendance as an additional activity on the contact timeline
4. Send emails with buttons to start GoToMeeting, GoToTraining and GoToAssist sessions

Instructions

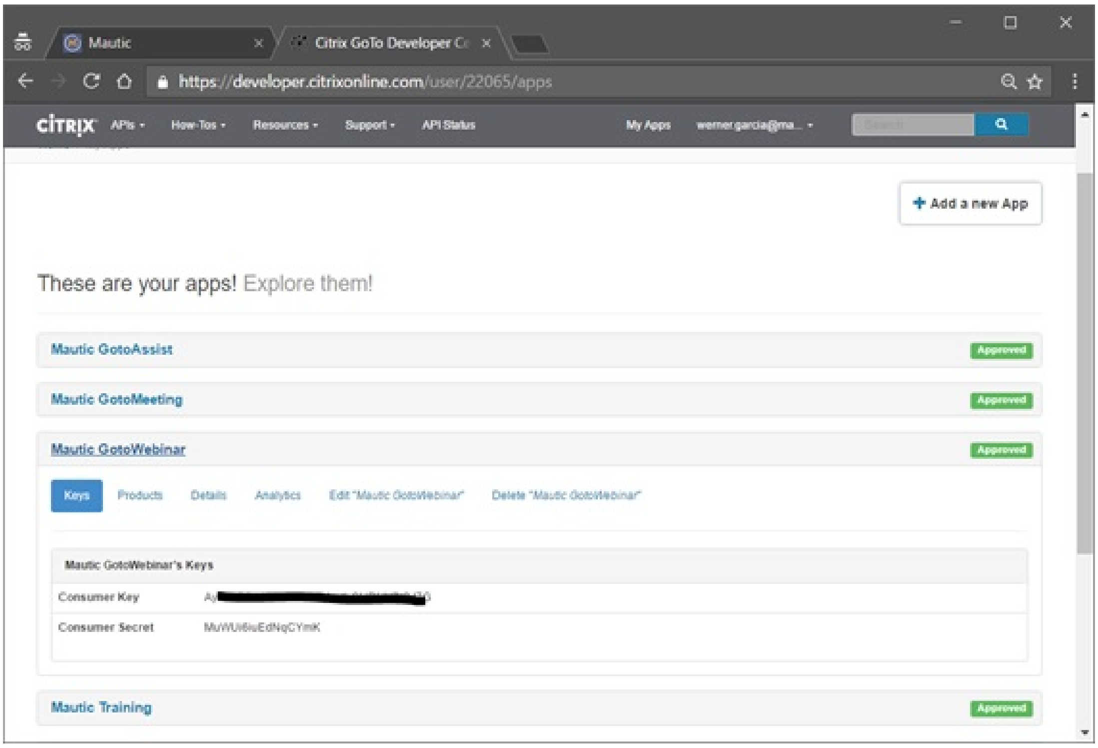
1. Enable the plugins you need



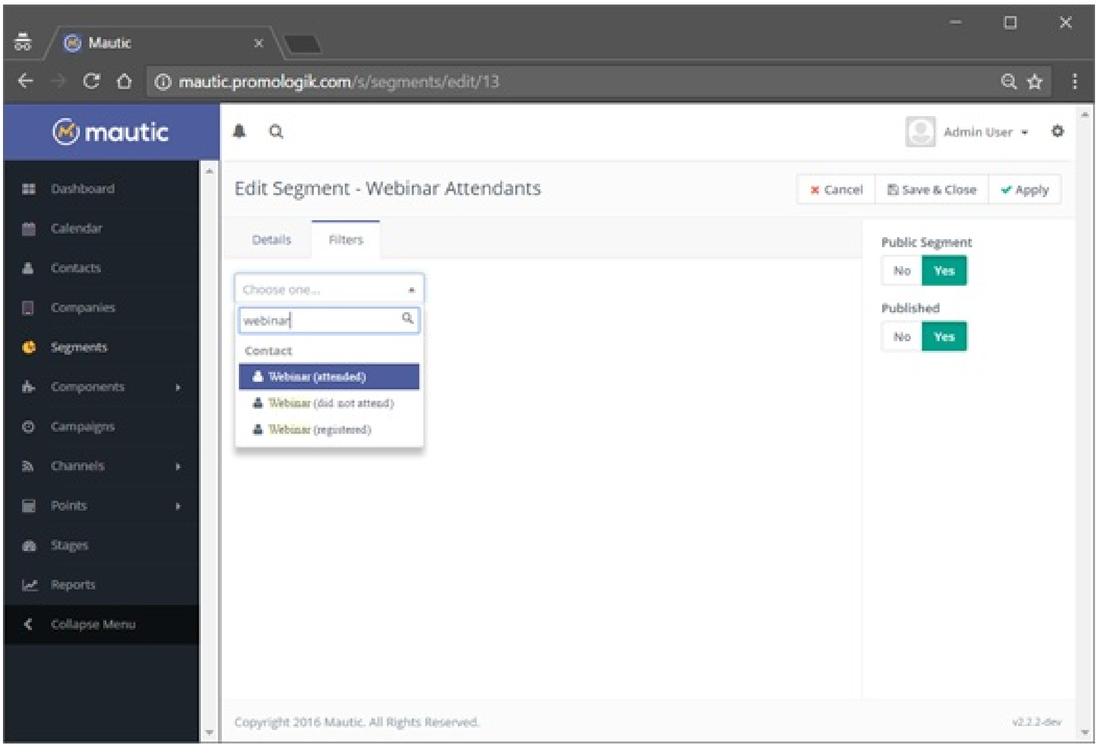
1. Activate the plugins with the Citrix Developer API keys



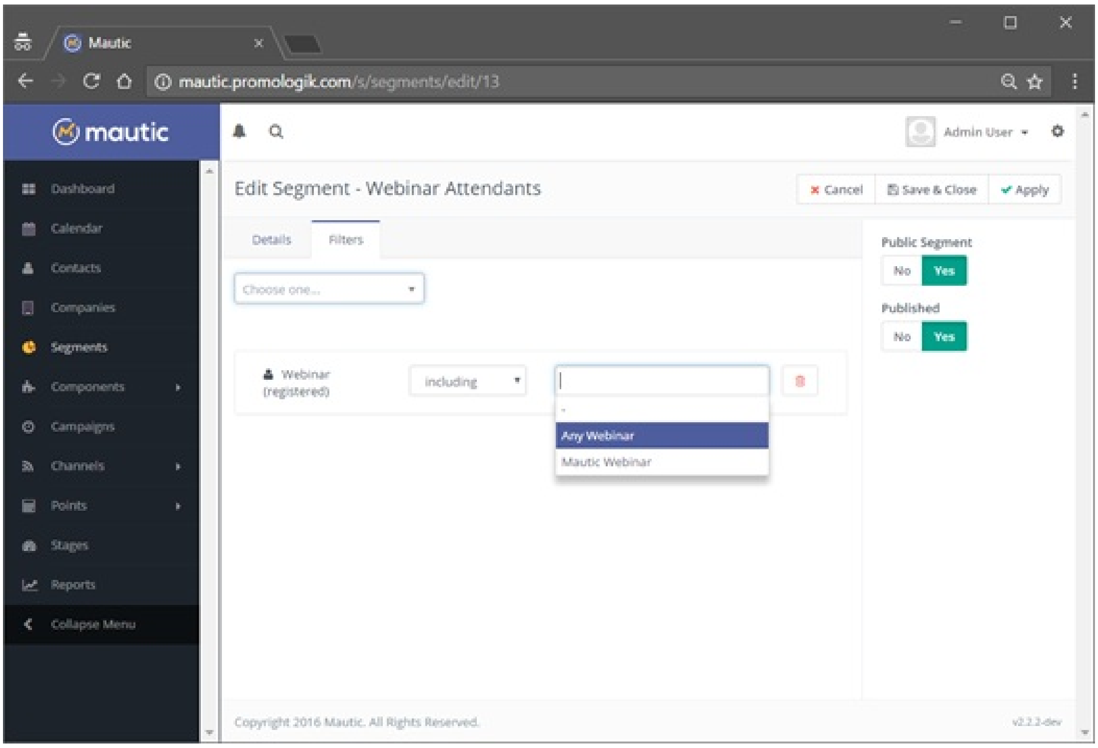
1. Use the Consumer Keys from the developer website



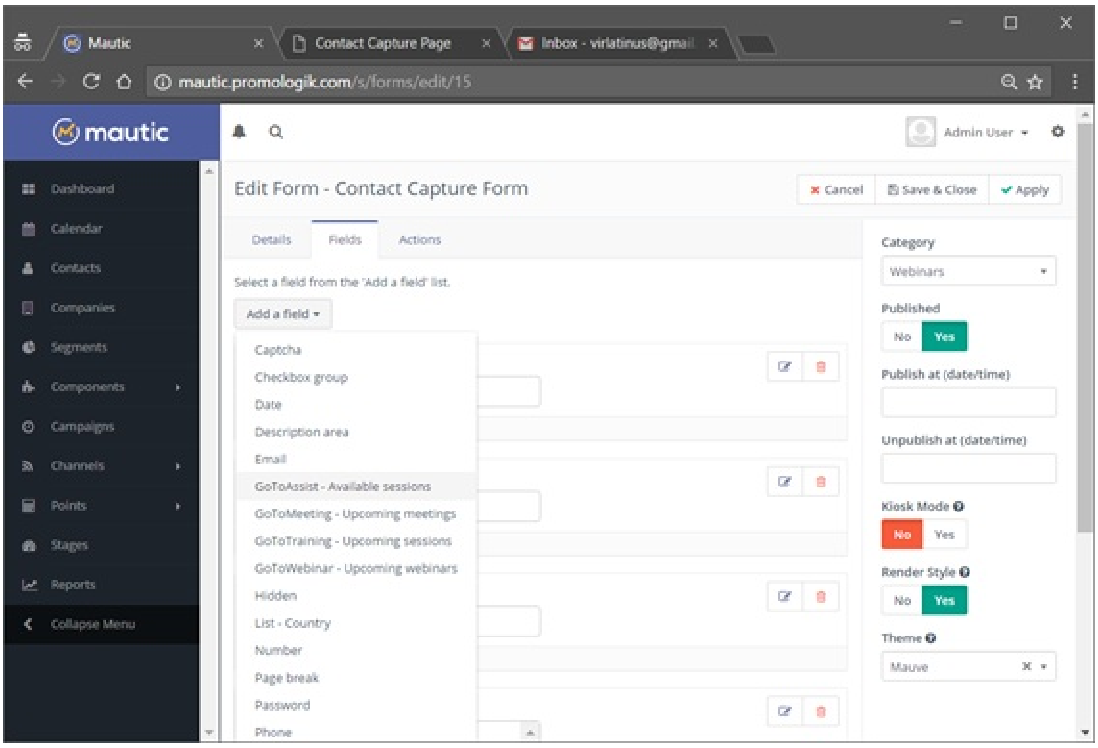
1. New segment filters will be available



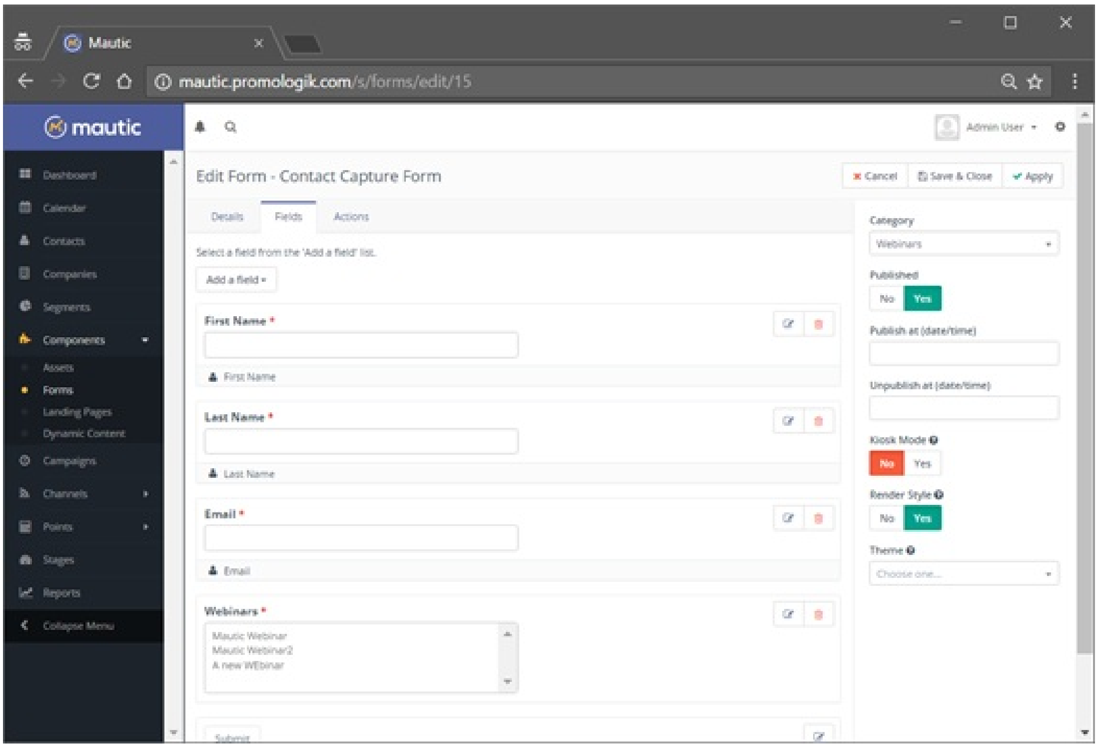
1. Past sessions will be available to choose from



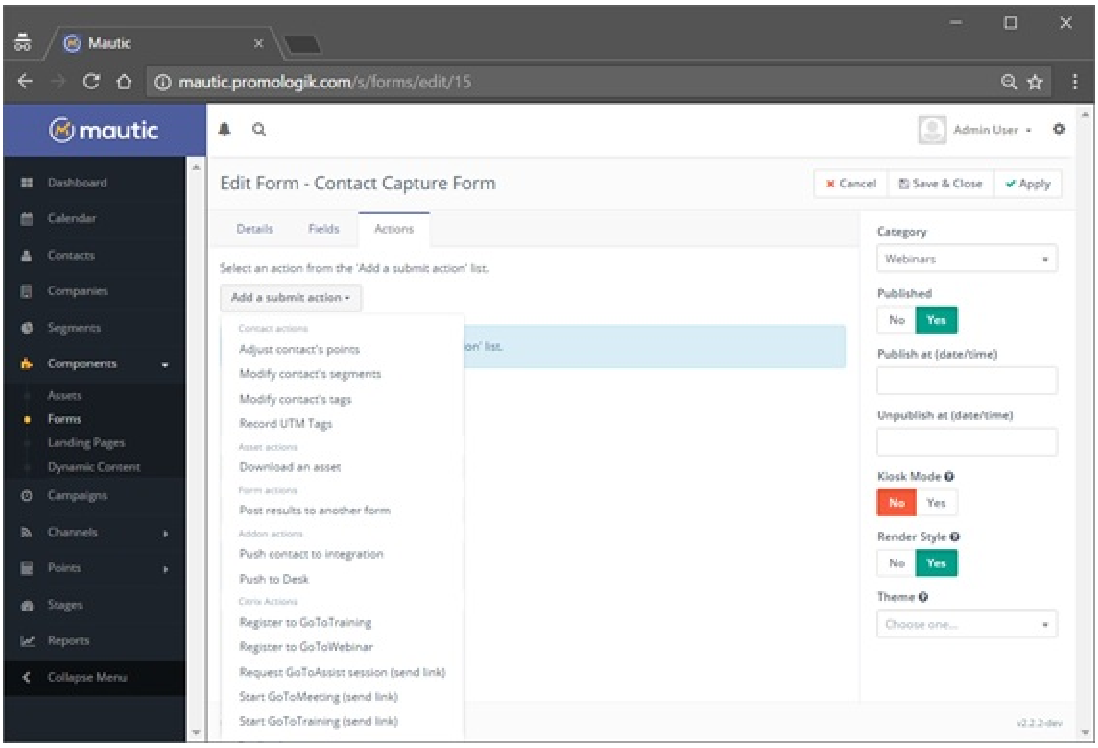
1. New fields will be availabe for forms



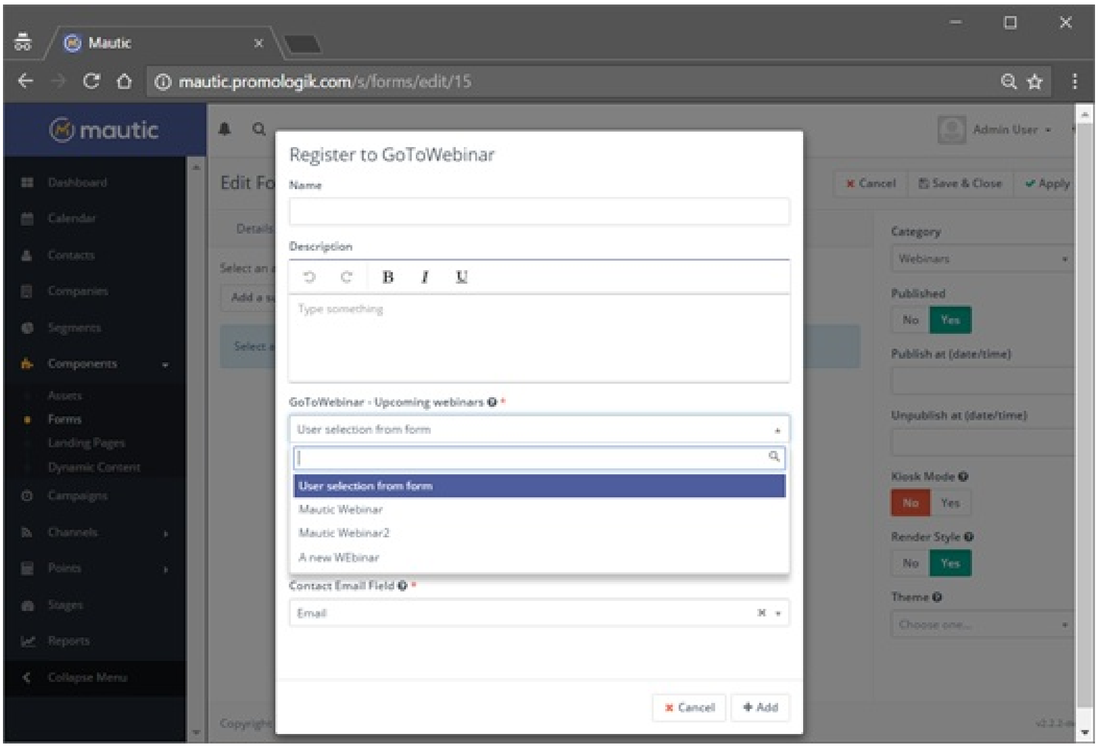
1. The fields will display the available events for each product (the form will validate that the mandatory fields are present)



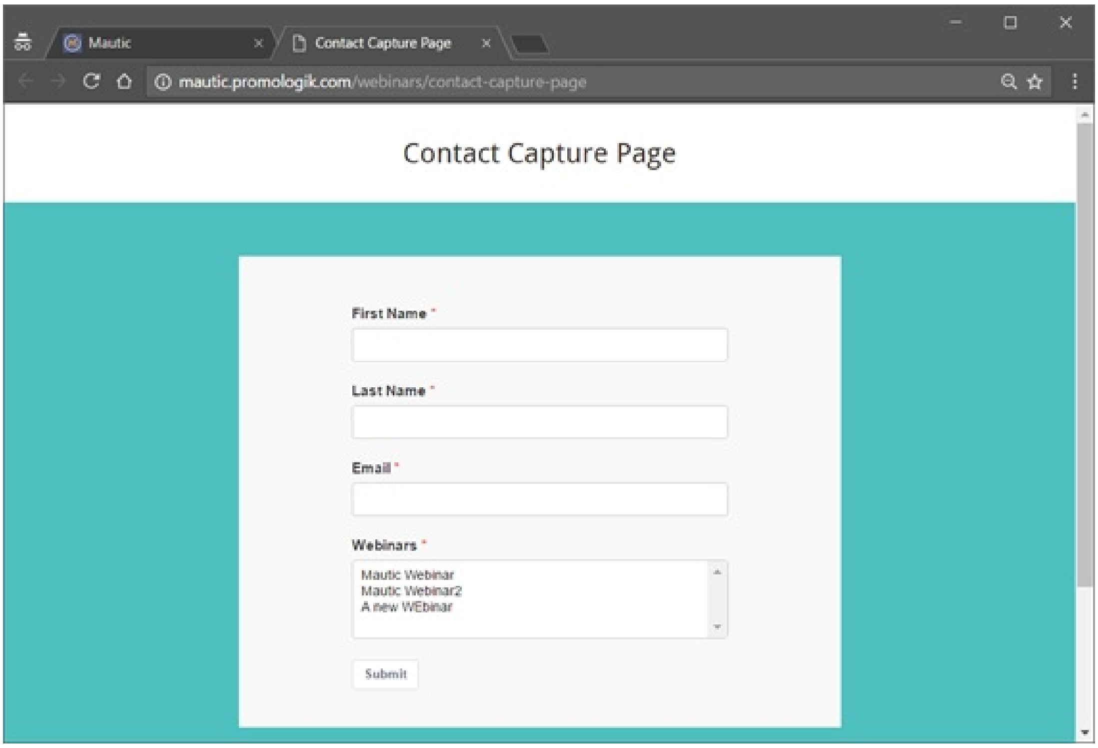
1. Form actions will also be available



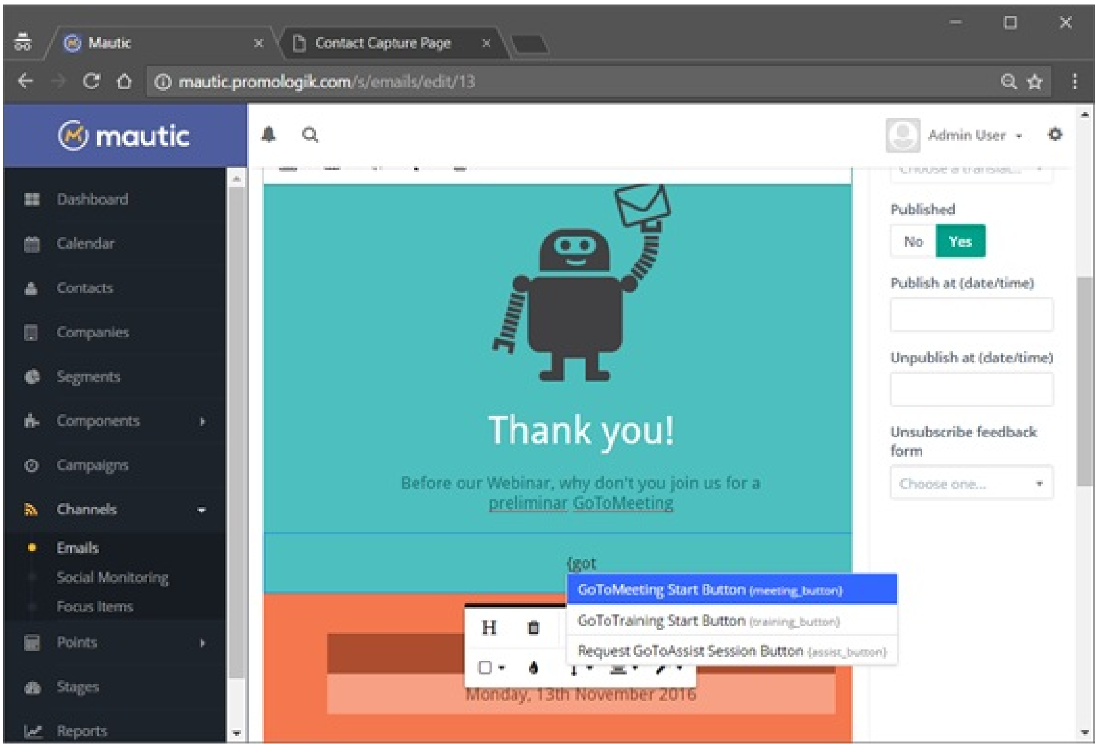
1. Each action will permit to select a single event or let the user select from the form. They also include fields to map to obligatory lead fields



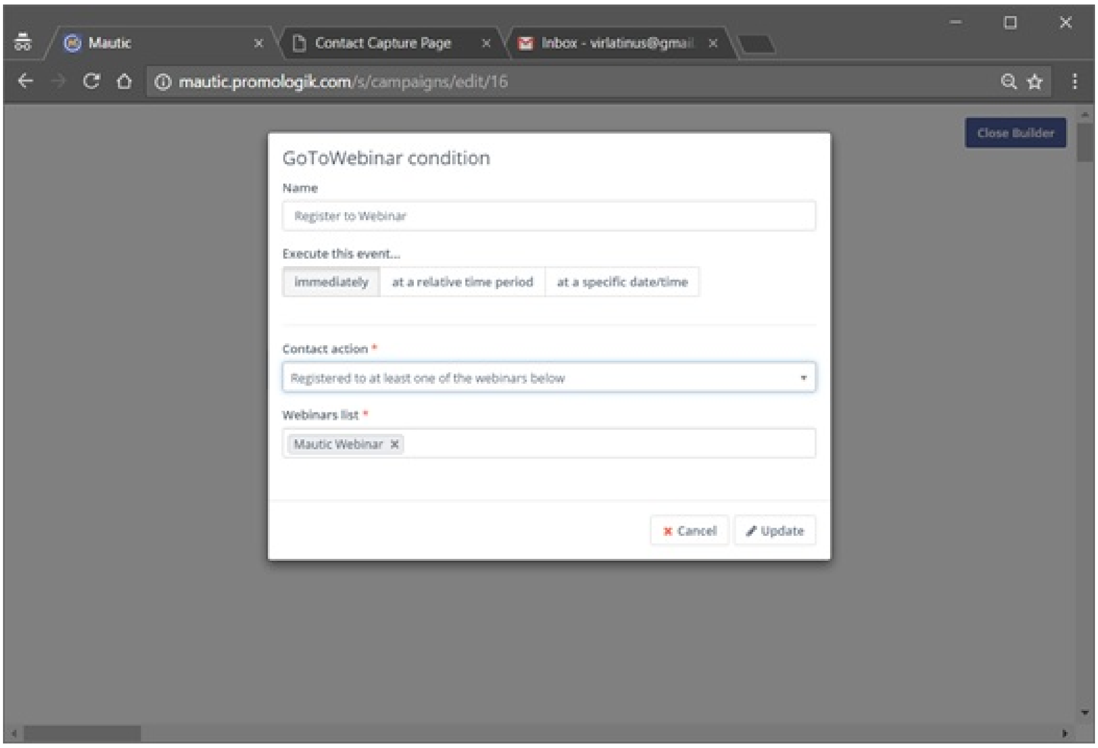
1. This is an example of a form that lets the user select the event from a list



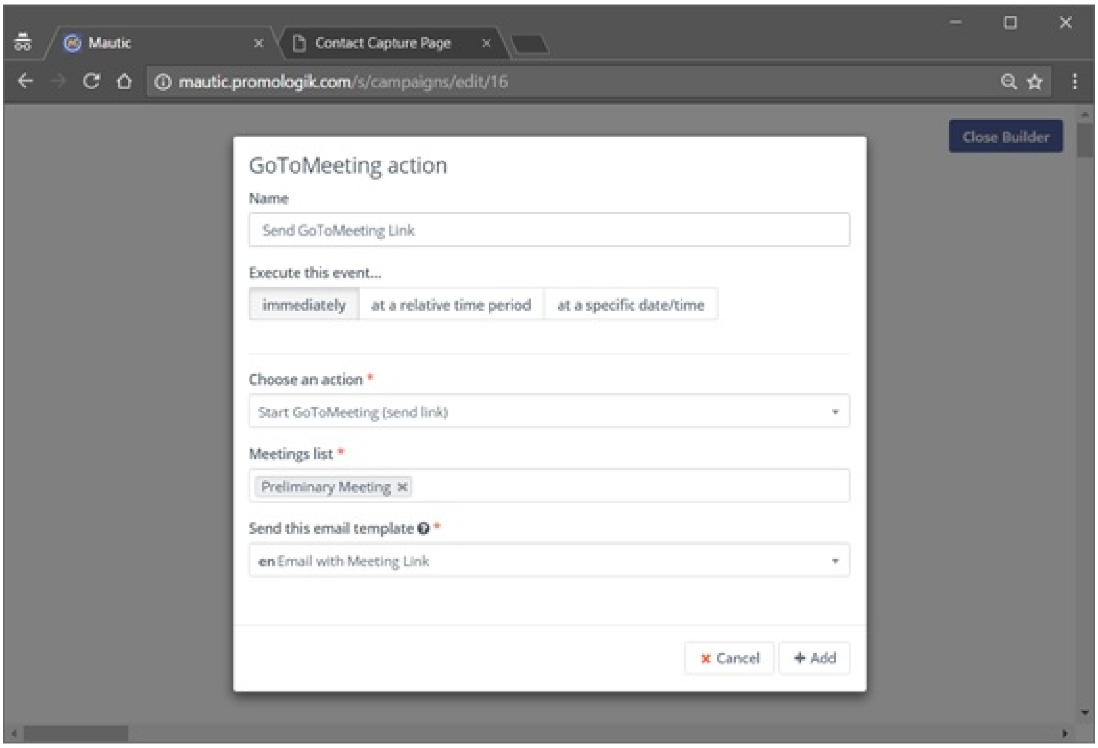
1. The Send Link actions require an email object with a Token to insert the link of the event (the available tokens are shown)



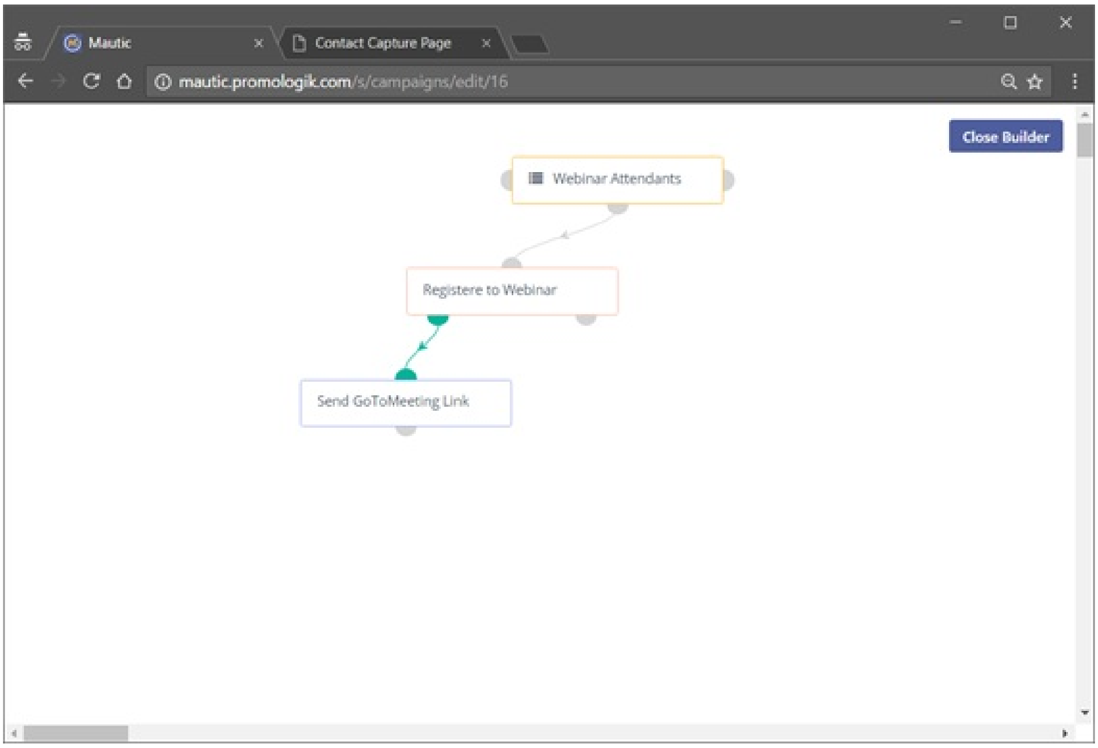
1. There are also conditions for campaigns (registered and attended)



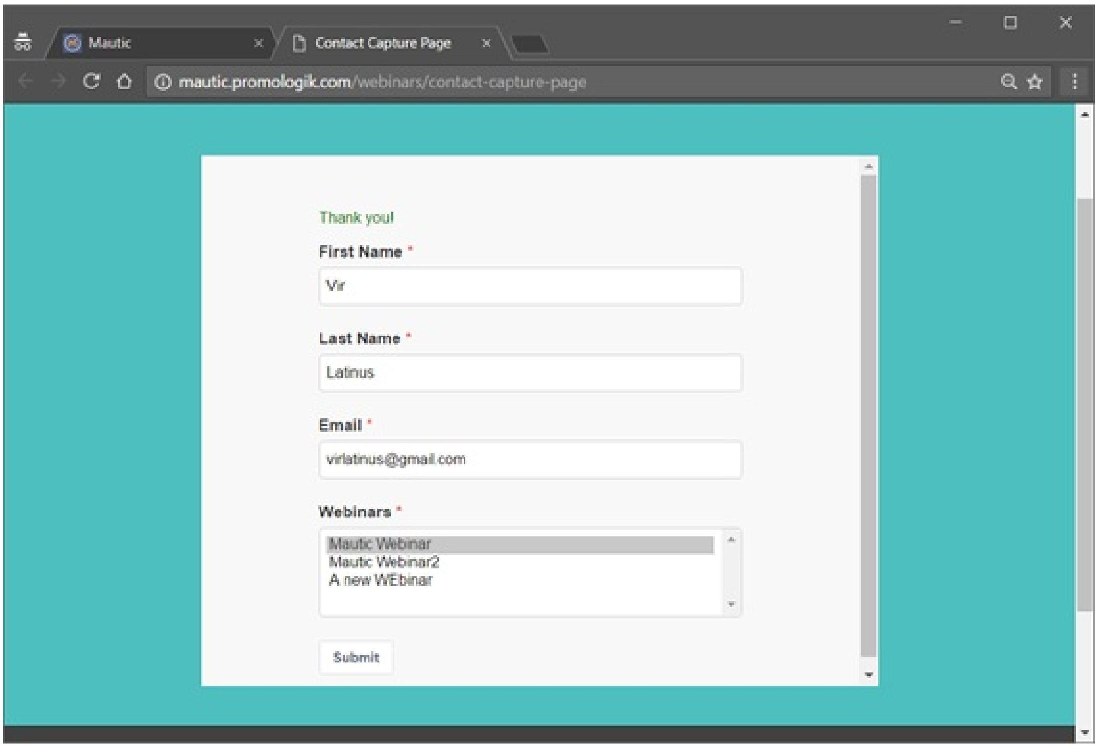
1. The campaign actions allow to select the event and the email template to send (if applicable)



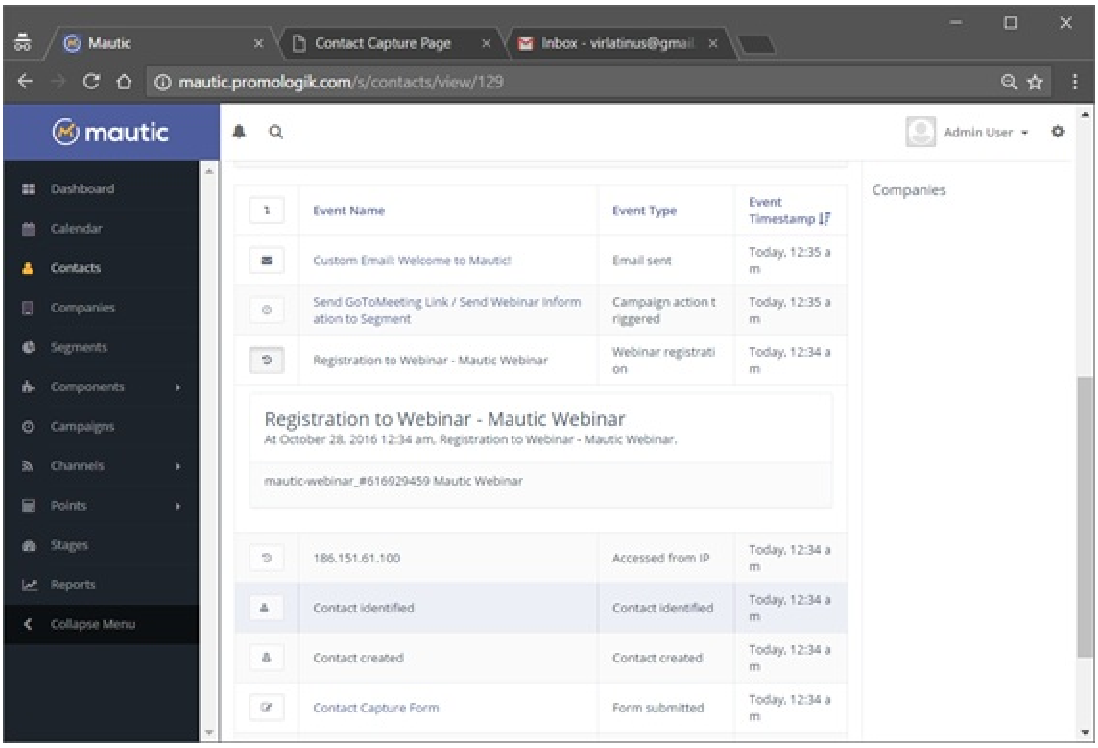
1. This is an example of a campaign that sends a link to a preliminary meeting after a contact is identified as to have registered to a webinar (using segment)



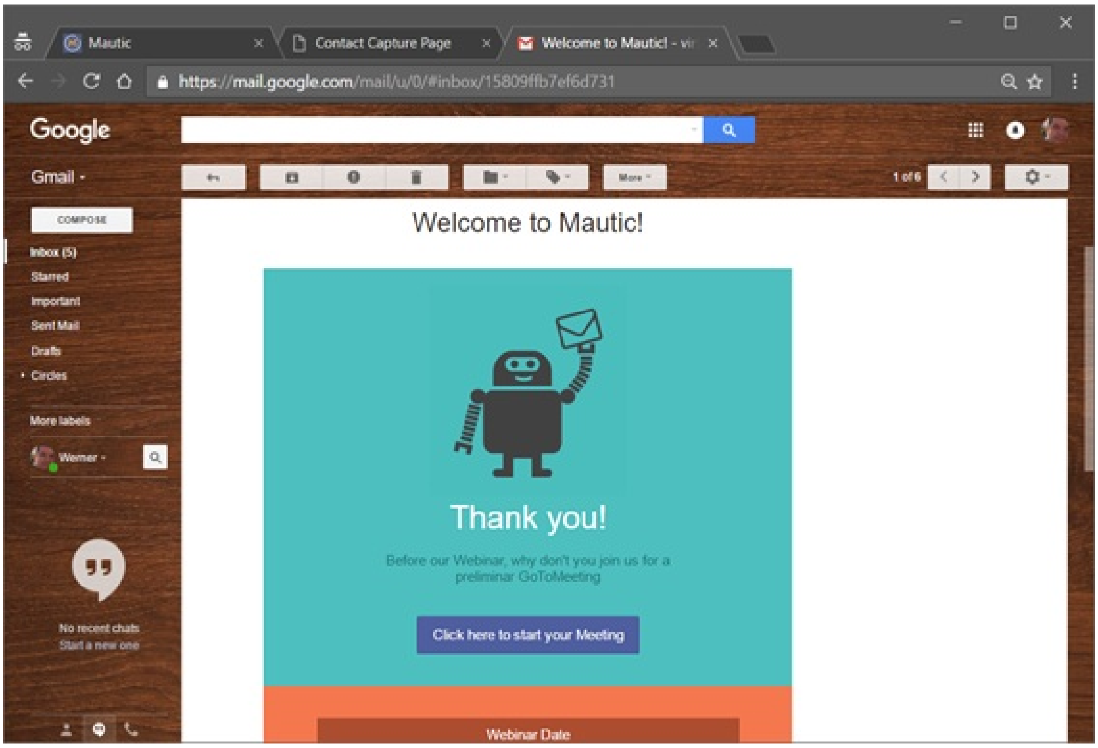
1. In this example, the form has been submitted



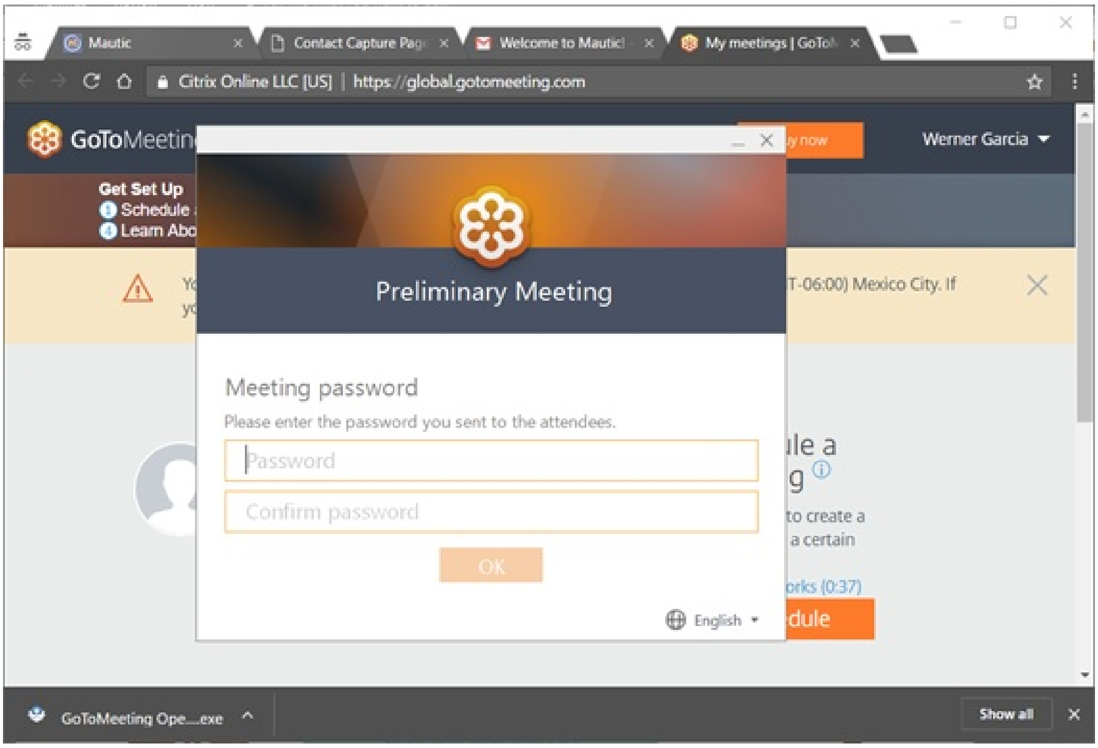
1. The new events appear in the contact's timeline



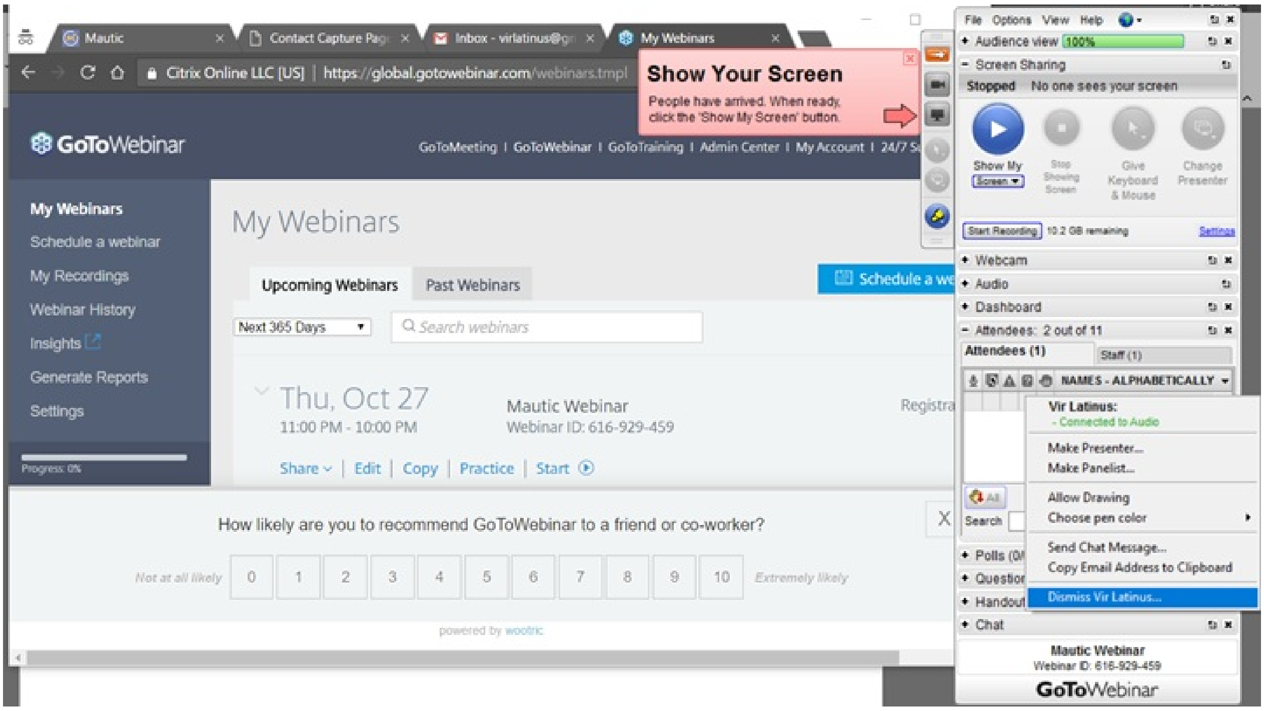
1. The email with the link (that was injected with the Token) is viewed in the browser



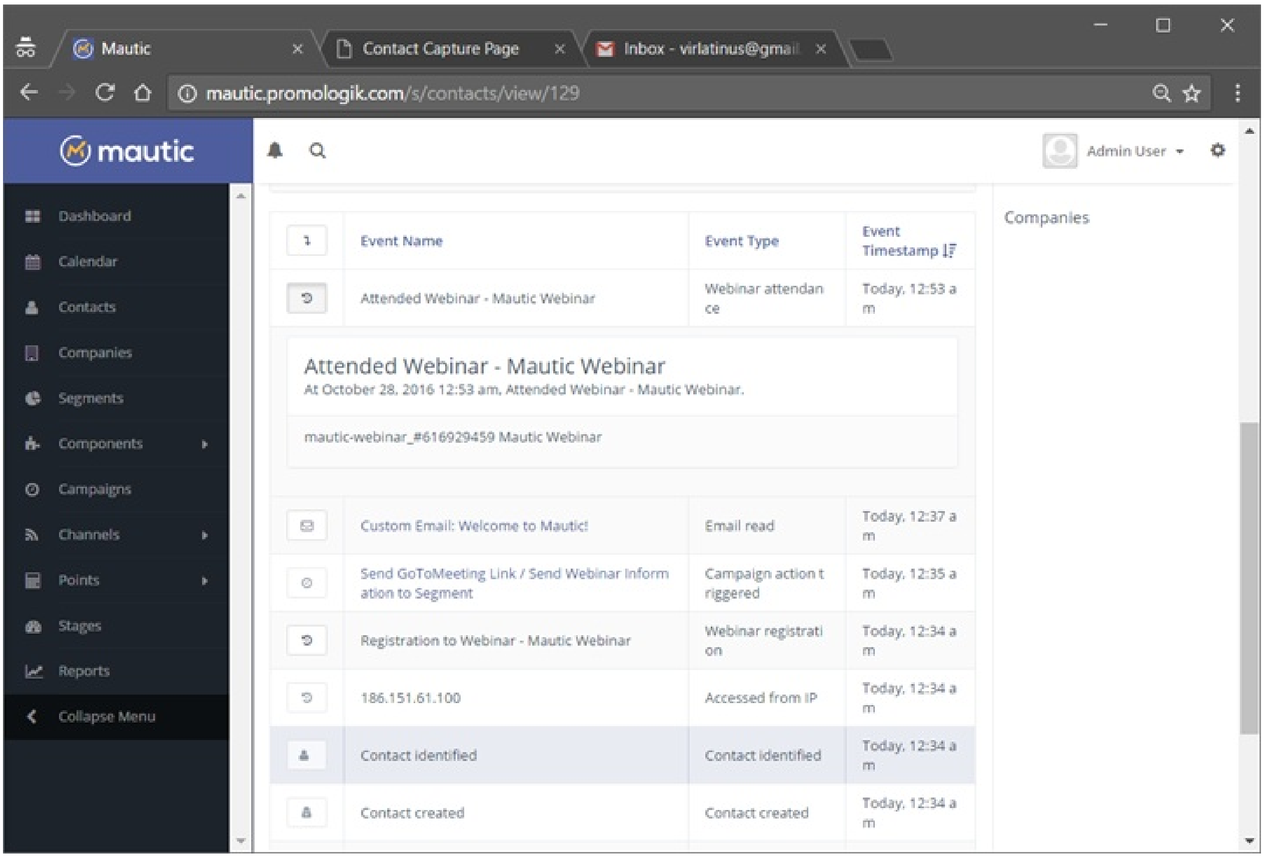
1. When the contact clicks on the link, it redirects to GoToMeeting to start the meeting



1. This is an example of a webinar where the contact attended



1. When the crontab job that synchronizes the data runs, it retrieves the new state of the contact and it's visible on the timeline as an attended event



The previous examples used GoToMeeting and GoToWebinar, but it's the same for GoToTraining and GoToAssist

Other details

The cron job to synchronize the events is

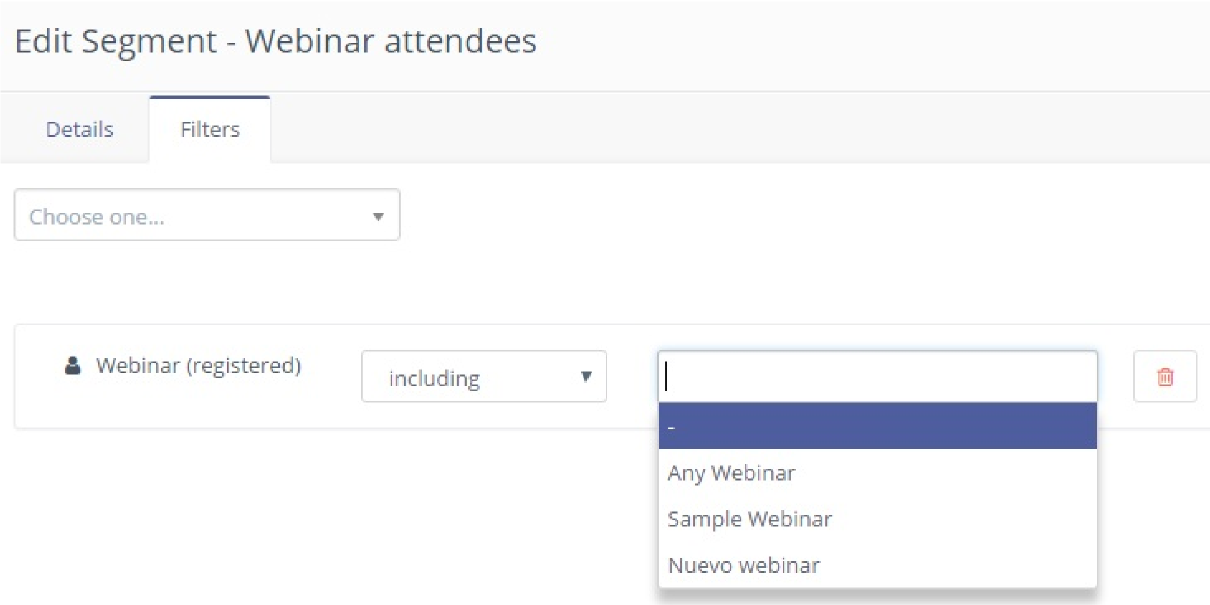
```
php app/console mautic:citrix:sync

Usage:
    mautic:citrix:sync [options]

Options:
    -p, --product[=PRODUCT]  Product to sync (webinar, meeting, training, assist)
    -i, --id[=ID]            The id of an individual registration to sync
```

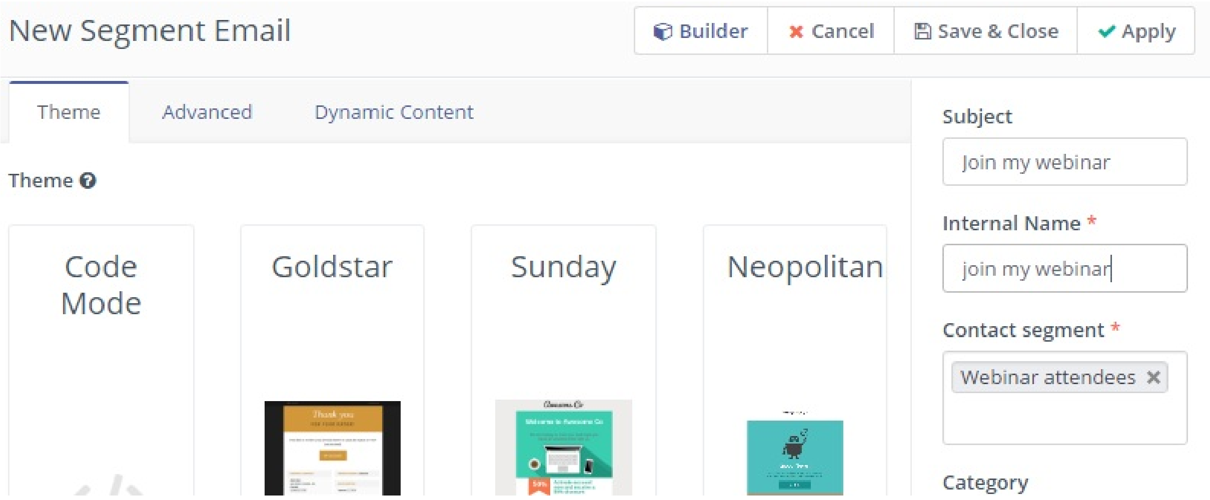
Update: Join GoToWebinar Button Token

1. Follow these steps to include a Join GoToWebinar button in a segment email:
2. Create a webinar in the GotoWebinar website
3. Create a new contact and use the email address to register for the new webinar
4. Run the Citrix Sync command: `php app/console mautic:citrix:sync` so that the webinar information is retrieved to the database.
5. Create a segment with a "Webinar (registered)" filter. (Note that this is mandatory, and it will be validated when trying to save the email with the token in the body)

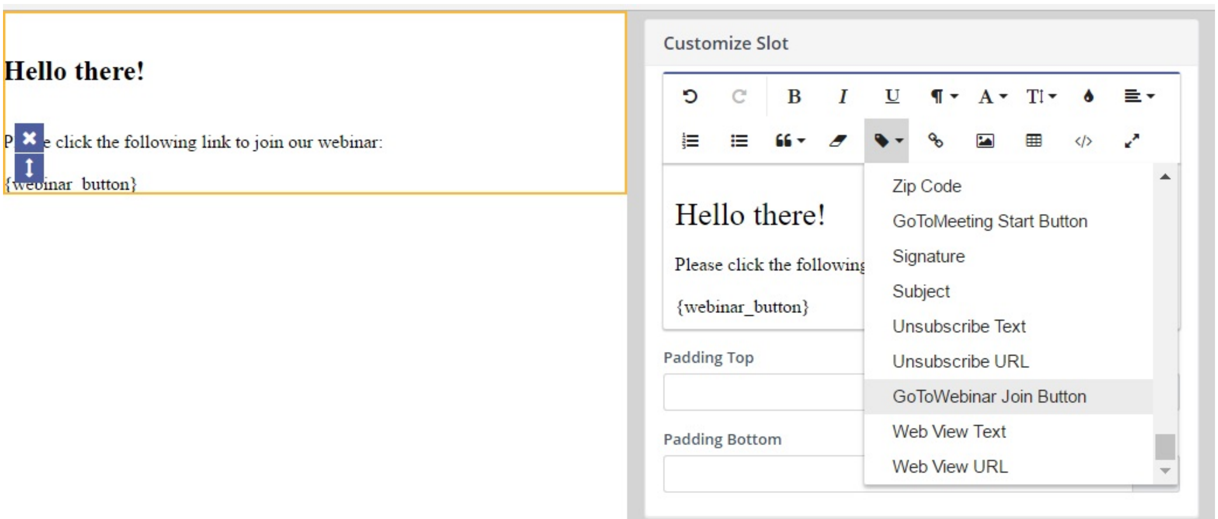


6. Add the contact to the segment manually or by running `php app/console mautic:segments:update`

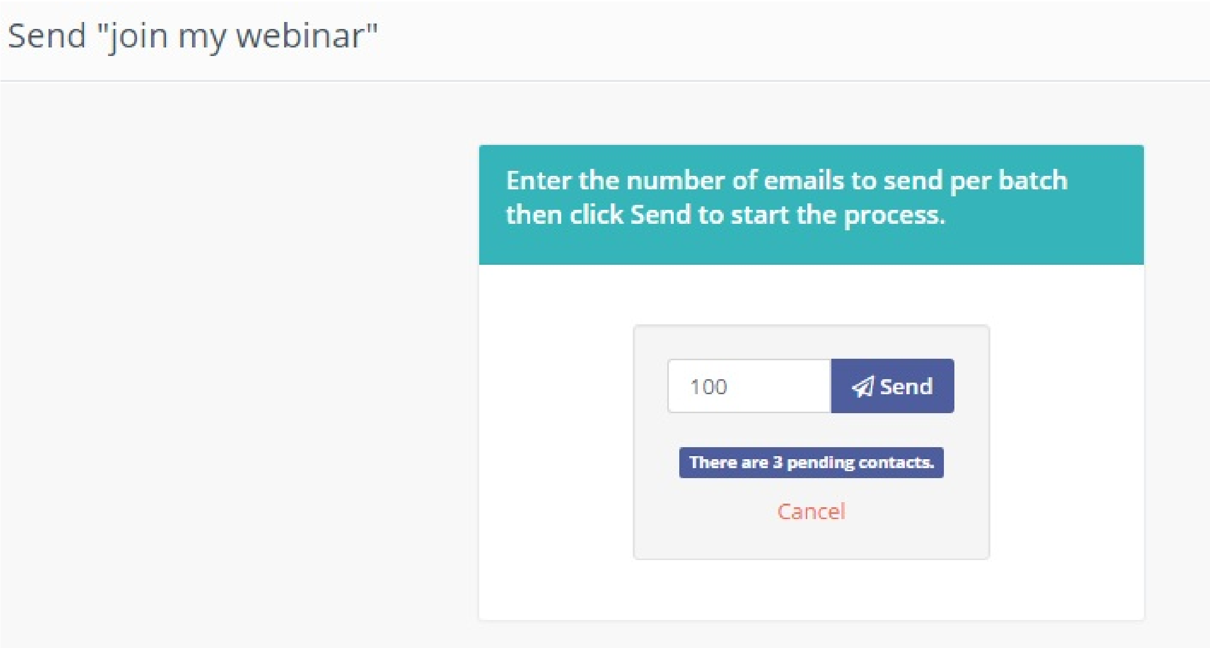
7. Create a new segment email and assign the previously created segment.

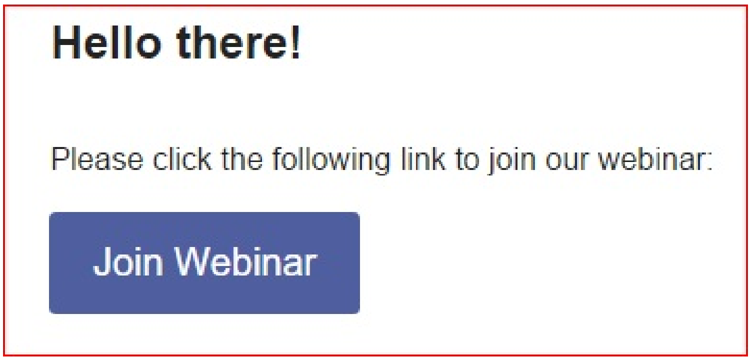


8. Open the email builder and insert the GotoWebinar button token:



9. Send the email to the segment contacts.



10. The email in the new contact inbox should include a button to join the webinar with the appropiate URL for the contact. 

11. The button can be styled by overriding the `citrix-start-button` CSS class. ie

```
.citrix-start-button {
background: green !important;
}
```

Mautic - Clearbit plugin

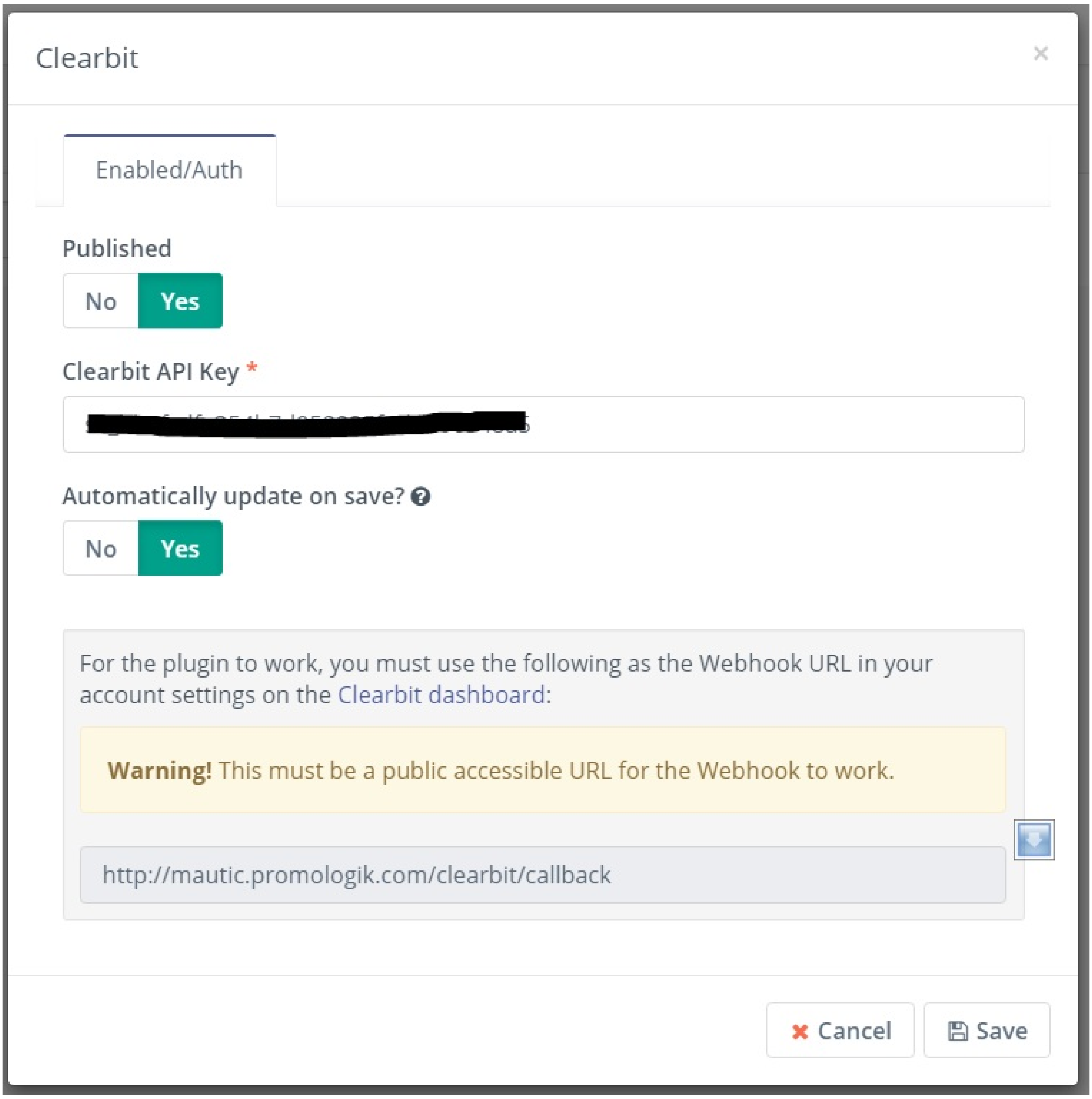
This plugin can:

- Pull data from Clearbit via the API about contacts and companies into Mautic.

Requirements

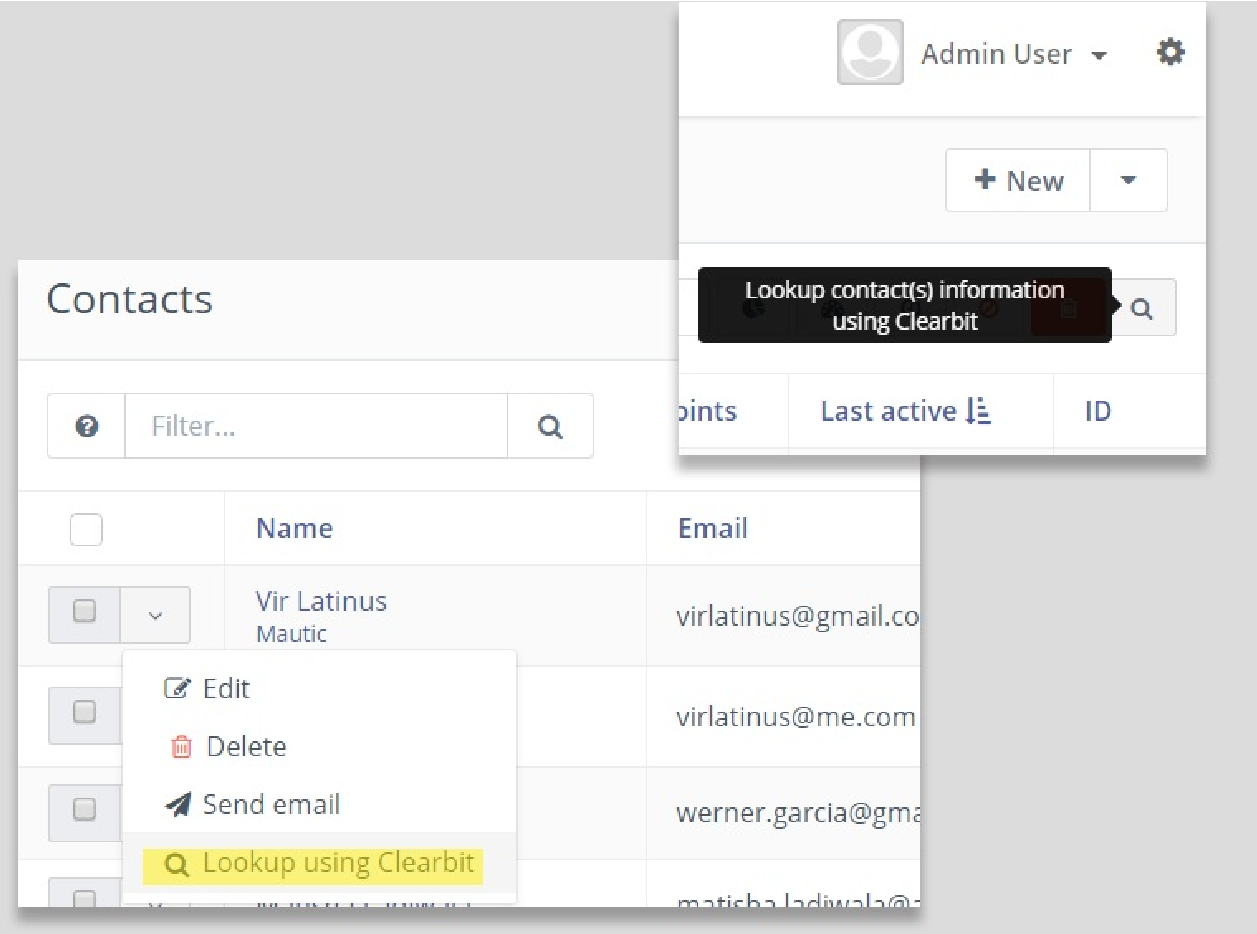
- Mautic installed on a publicly accessible URL. This plugin won't work on a localhost because callbacks from Clearbit to Mautic are necessary.
- Get a Clearbit API key

Authorize the plugin

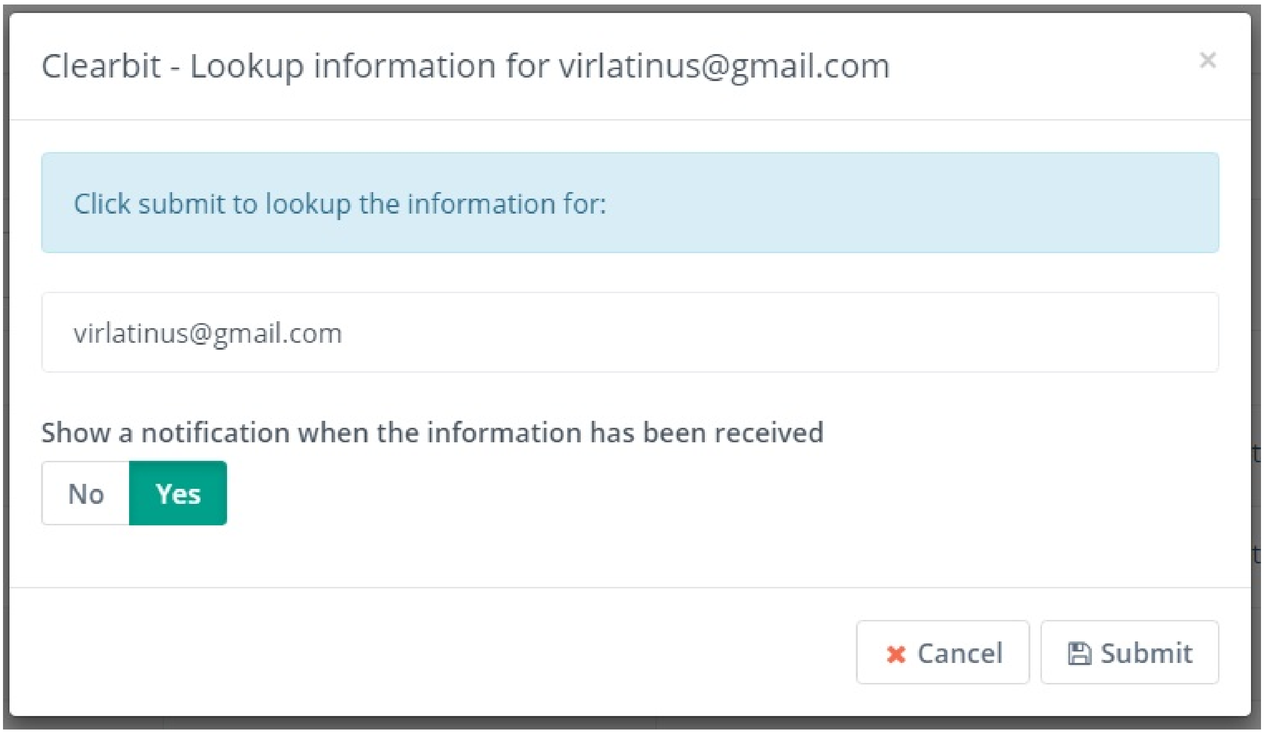


Usage

On the contacts and on the companies pages, there are two buttons: One on the row dropdown menu, and another one on the toolbar at the top:



When clicking one of those buttons a window will pop up to confirm the action:



A few moments later, if information was found, the contact/company details will be updated.

Mautic - Hubspot CRM plugin

This plugin can push a contact to Hubspot CRM when a contact makes some action. In case you don't see this plugin in your Mautic instance, make sure you run the latest version. This plugin had been added to Mautic 1.2.3.

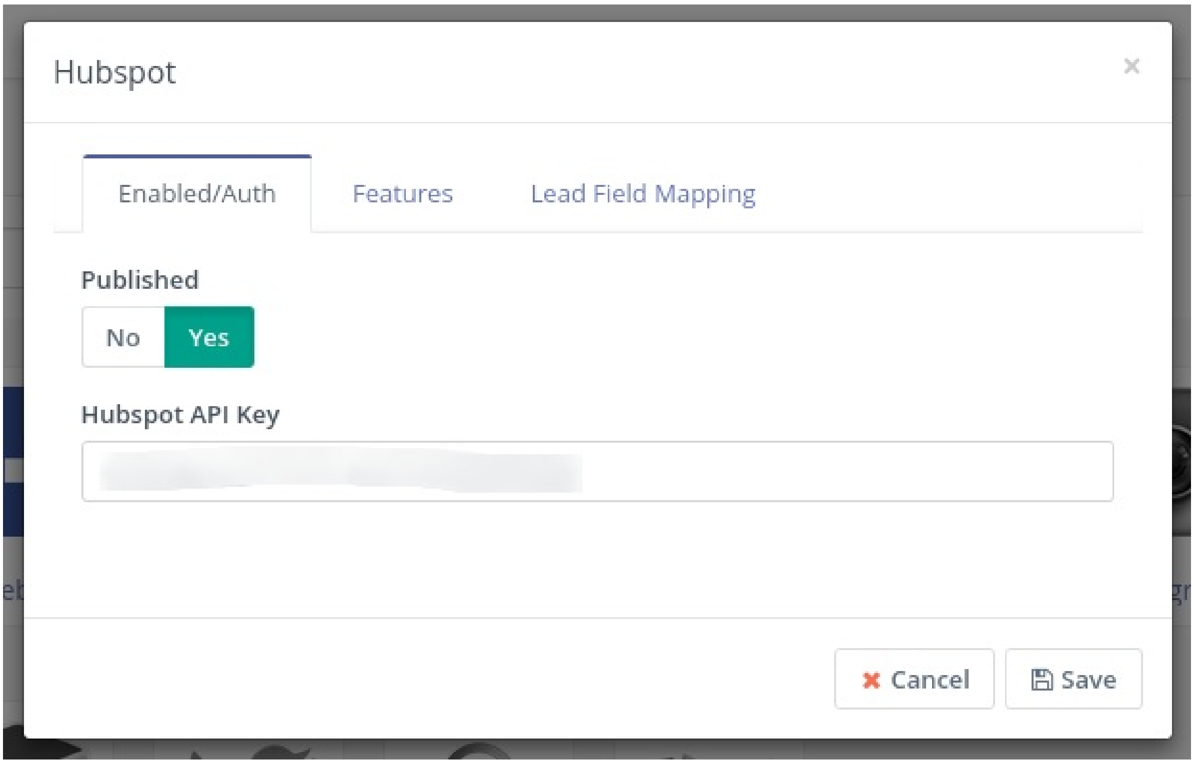
If you don't have the Hubspot CRM account yet, create it.

Hubspot API key

Visit https://app.hubspot.com/hapikeys to generate your Hubspot API key.

Configure the Hubspot CRM plugin

Open the Hubspot Plugin configuration and paste the API key into the *Hubspot API key* input field. Also, if you want to use the plugin, you have to publish it. Set the *Publish* switch to *Yes*.



In the Features tab is just *Push contacts to this integration* checkbox and it is checked by default.

Configure the field mapping.

Save the plugin configuration.

Test the plugin

Follow these steps to test the integration.

Troubleshooting

If the contact hasn't been created, make sure that the email address you'd tested it with is valid. Hubspot will create a new contact only when its email address is valid.

Credit

This plugin had been developed by @gpassarelli.

iContact integration

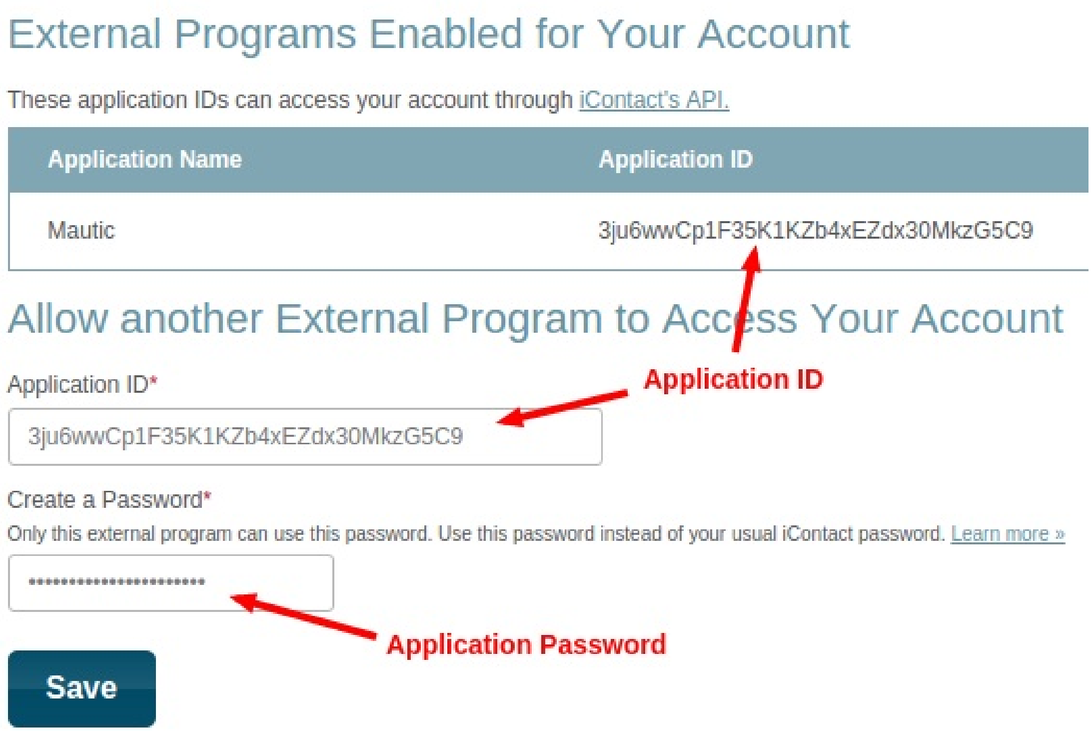
Mautic can send contacts to iContact upon some contact's action or when they gain some point limit.

Authorize

In order to connect your iContact account with your Mautic, you'll have to create a iContact app.

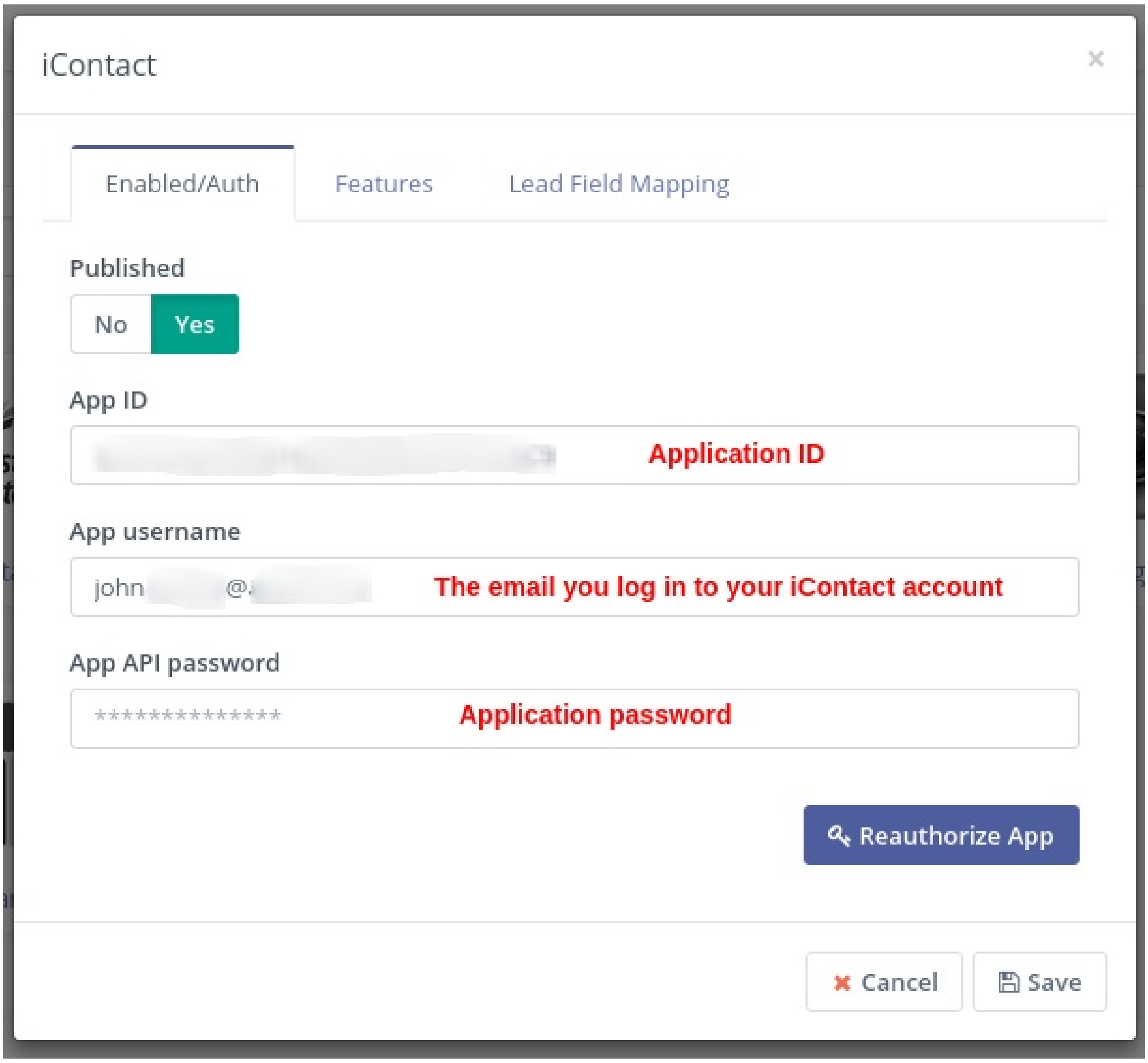
Follow the tutorial on how to create your iContact APP.

When you have your app created, you should be able to see this screen:



Fill in the right credentials to Mautic - iContact integration:

- App ID = the Application ID you've created
- App username = the username / email you log into your iContact account. (Not the App name)
- App password = The password you've chosen when approving the app.



Configure the plugin

Navigate to the *Features* tab in the plugin configuration modal box. Select the iContact segment where the Mautic contacts should be pushed into. There should be one segment created by default.

Other configuration options are:

- **Push contacts to this integration** - This option is checked by default. If you uncheck it, the plugin will not push contacts to iContact any more.

Test the plugin

Follow these steps to test the integration.

Mautic - FullContact plugin

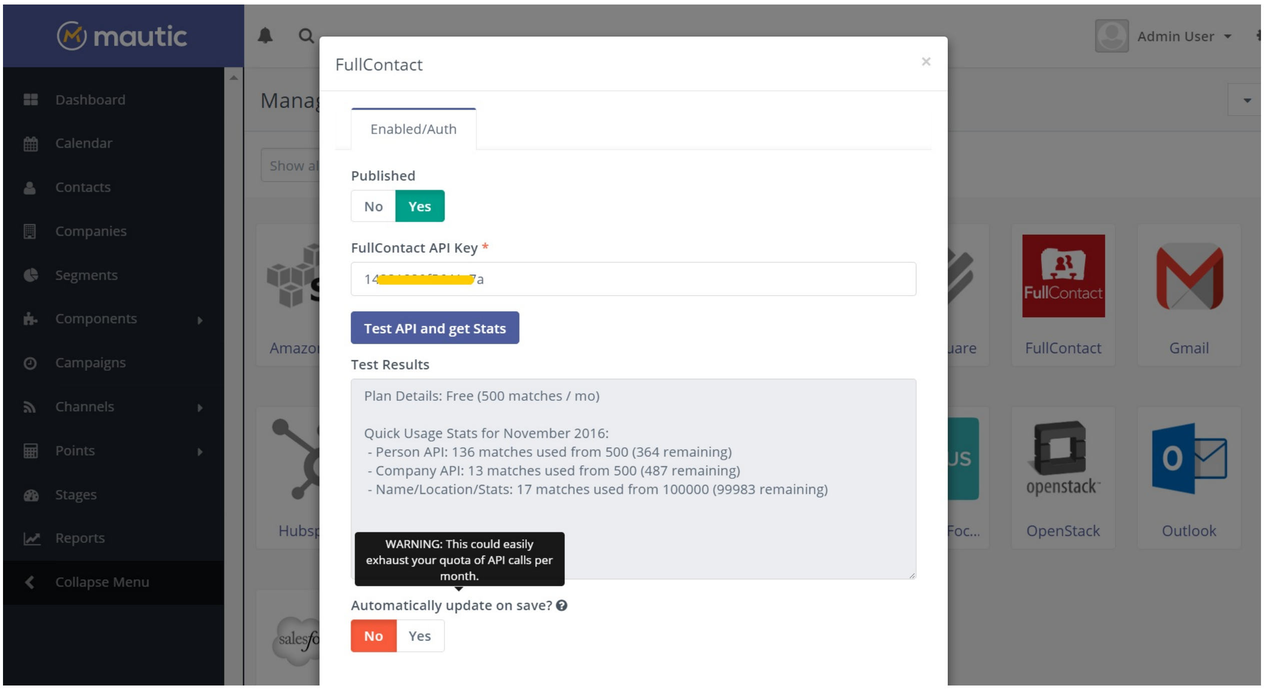
This plugin can:

- Pull data from Full Contact via the API about contacts and companies into Mautic.

Requirements

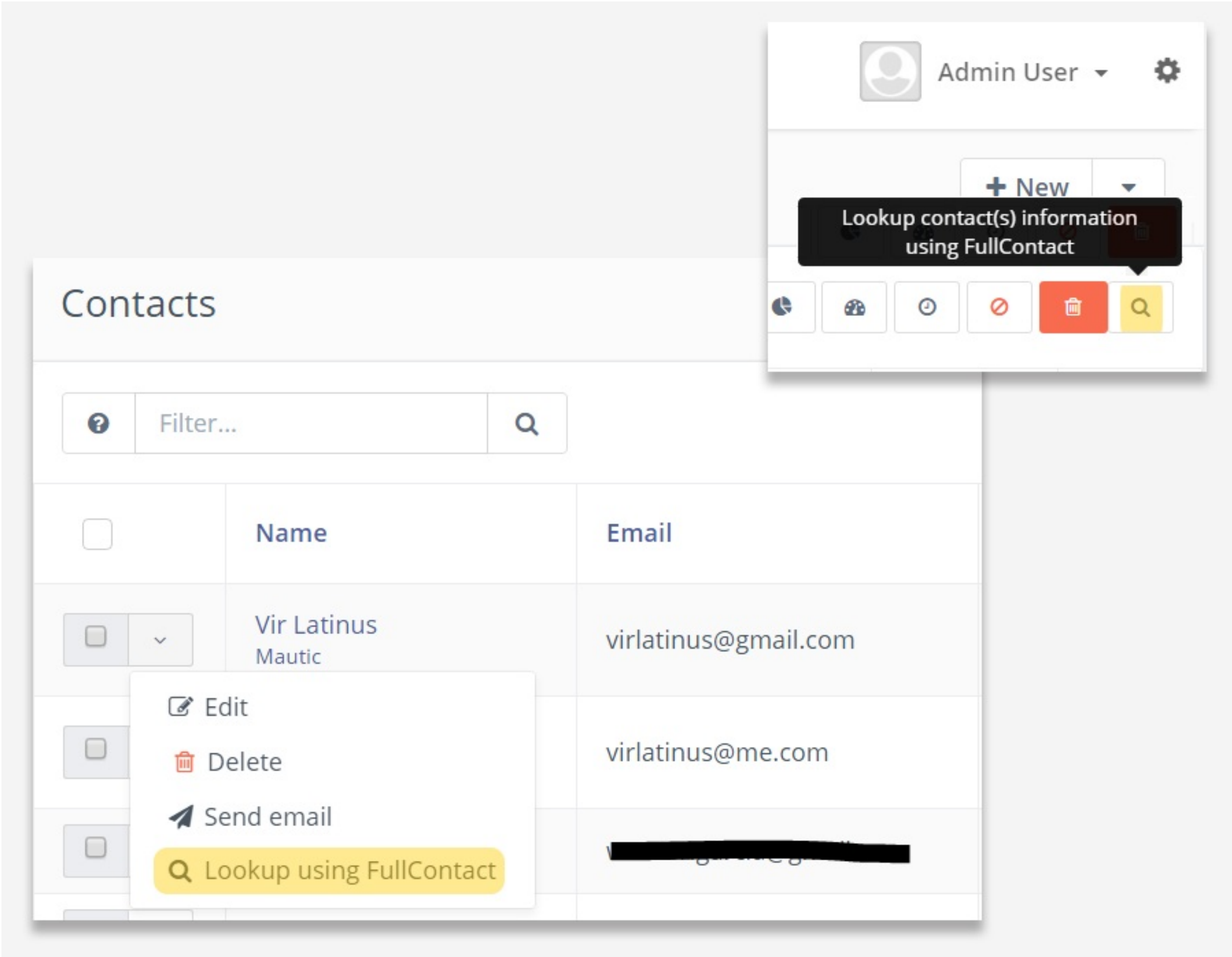
- Mautic installed on a publicly accessible URL. This plugin won't work on a localhost because callbacks from FullContact to Mautic are necessary.
- Get a Full Contact API key

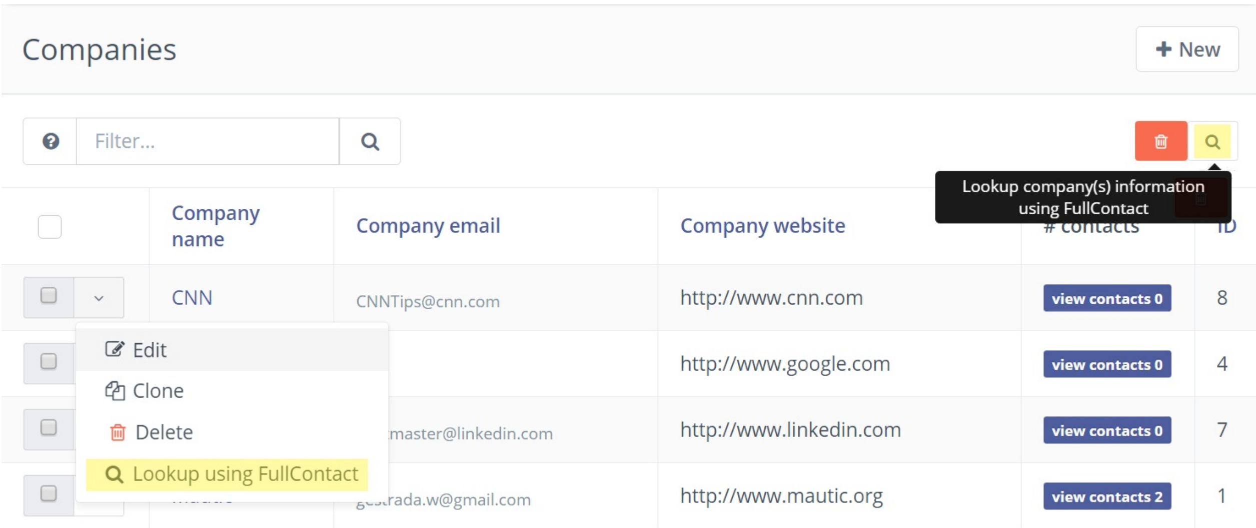
Authorize the plugin



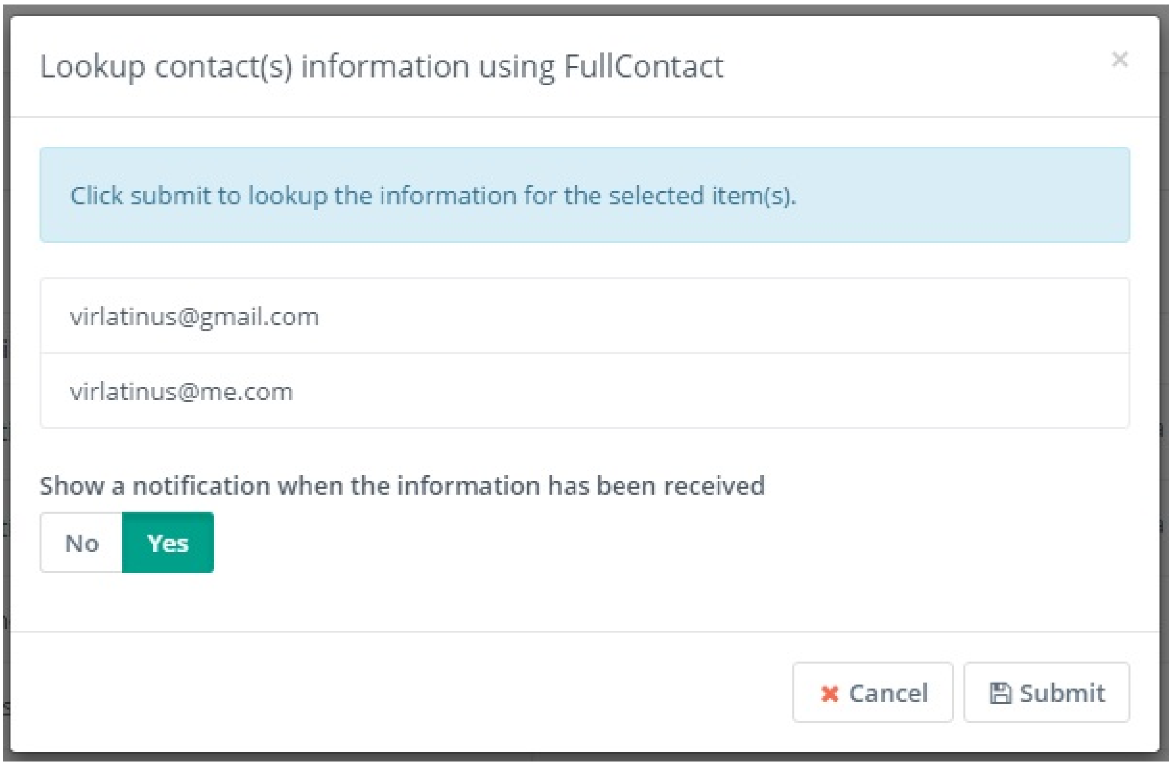
Usage

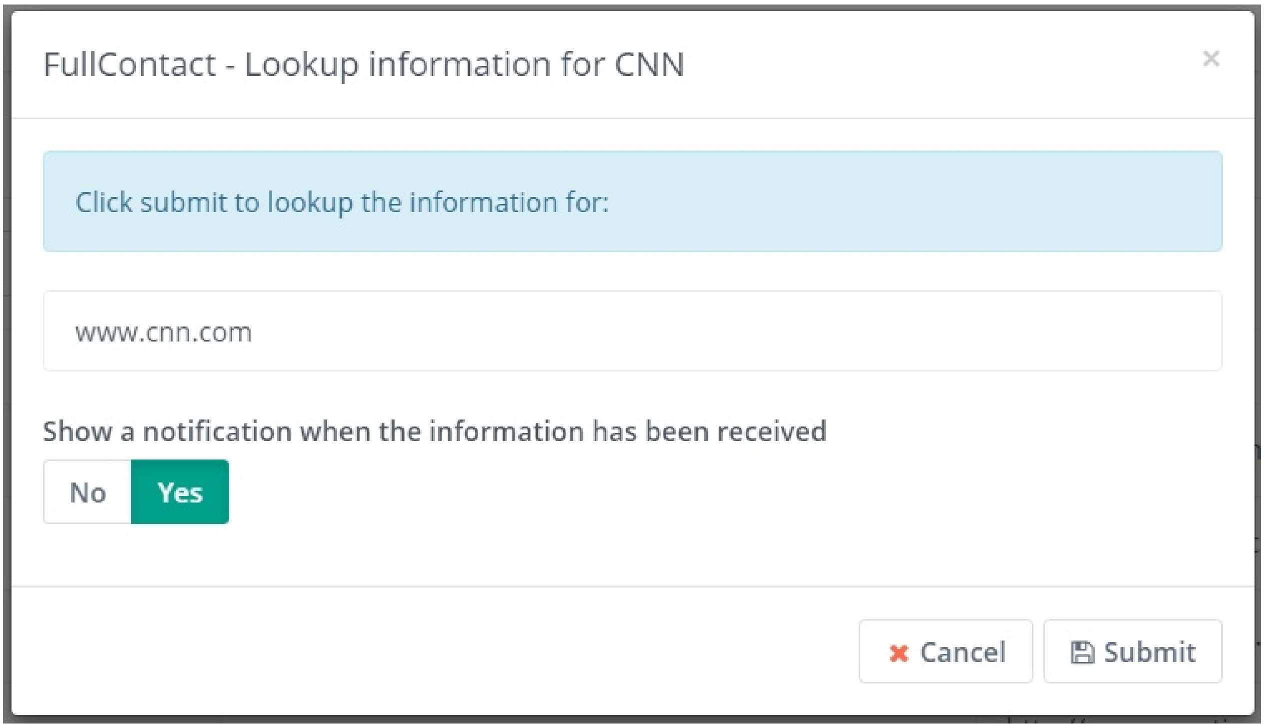
On the contacts and on the companies pages, there are two buttons: One on the row dropdown menu, and another one on the toolbar at the top:





When clicking one of those buttons a window will pop up to confirm the action:





A few moments later, if information was found, the contact/company details will be updated.

Gmail Plugin for Mautic

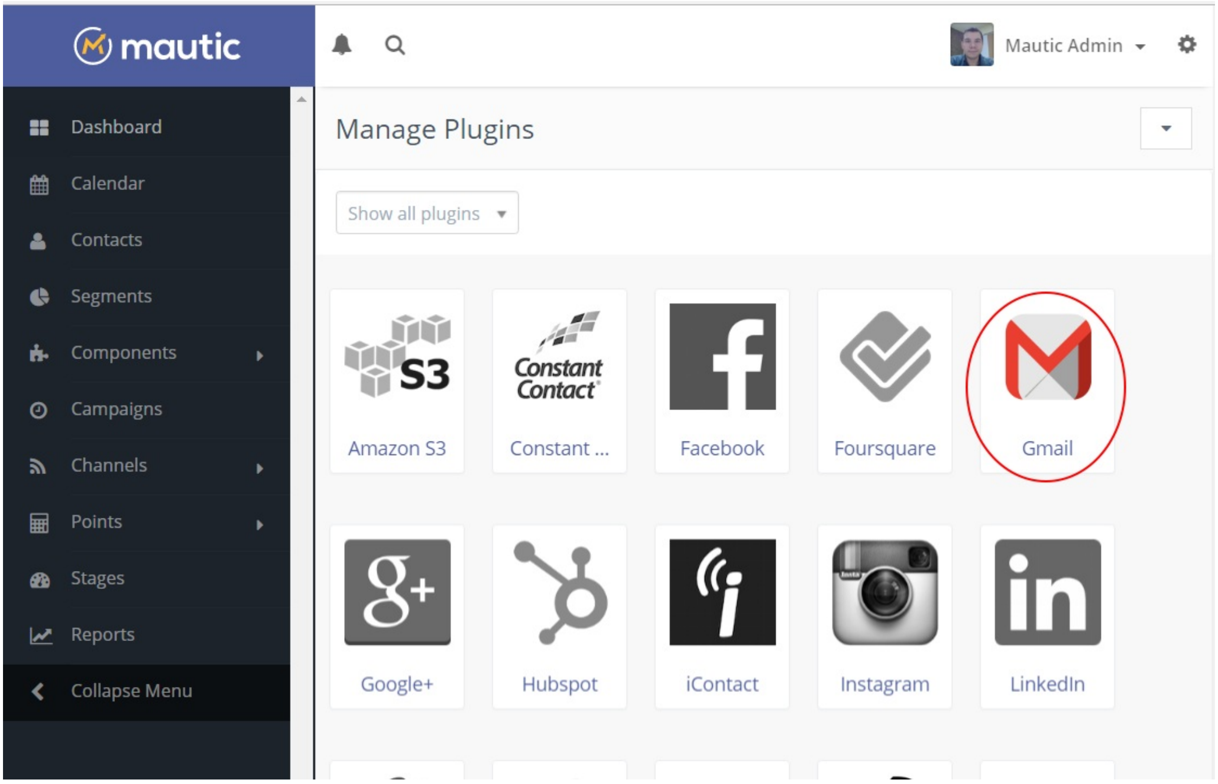
This plugin allows for the Mautic Helper Chrome Extension to keep track of emails sent to leads from within Gmail.

Requirements

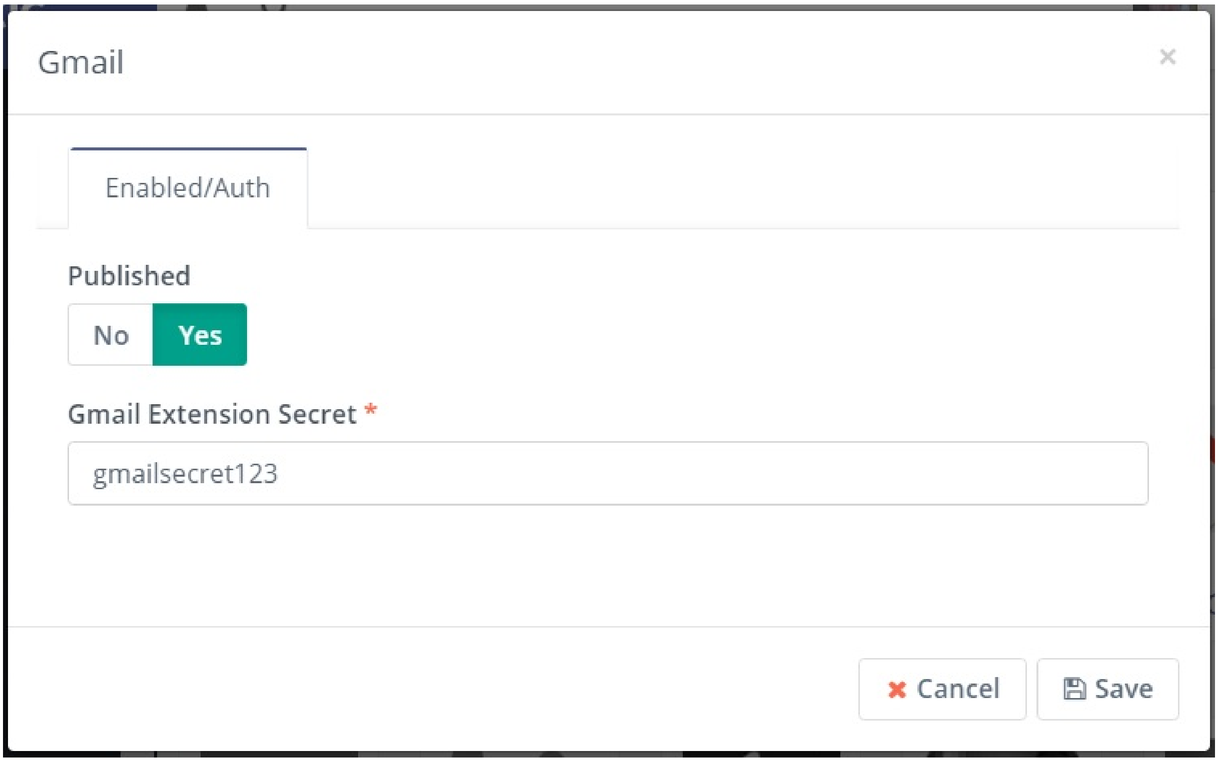
- Mautic installed on a publicly accessible URL.
- Gmail account (for email tracking).
- Mautic Helper Chrome Extension

Configure the plugin

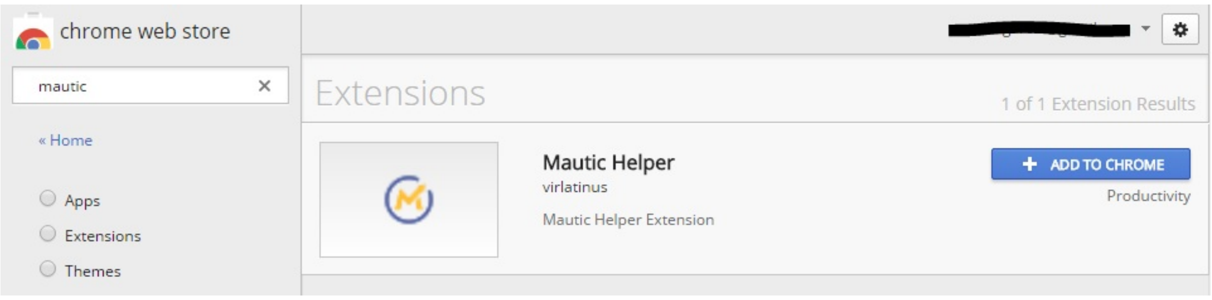
1. Install the Mautic plugin as usual. It will appear on the plugins page in Mautic.



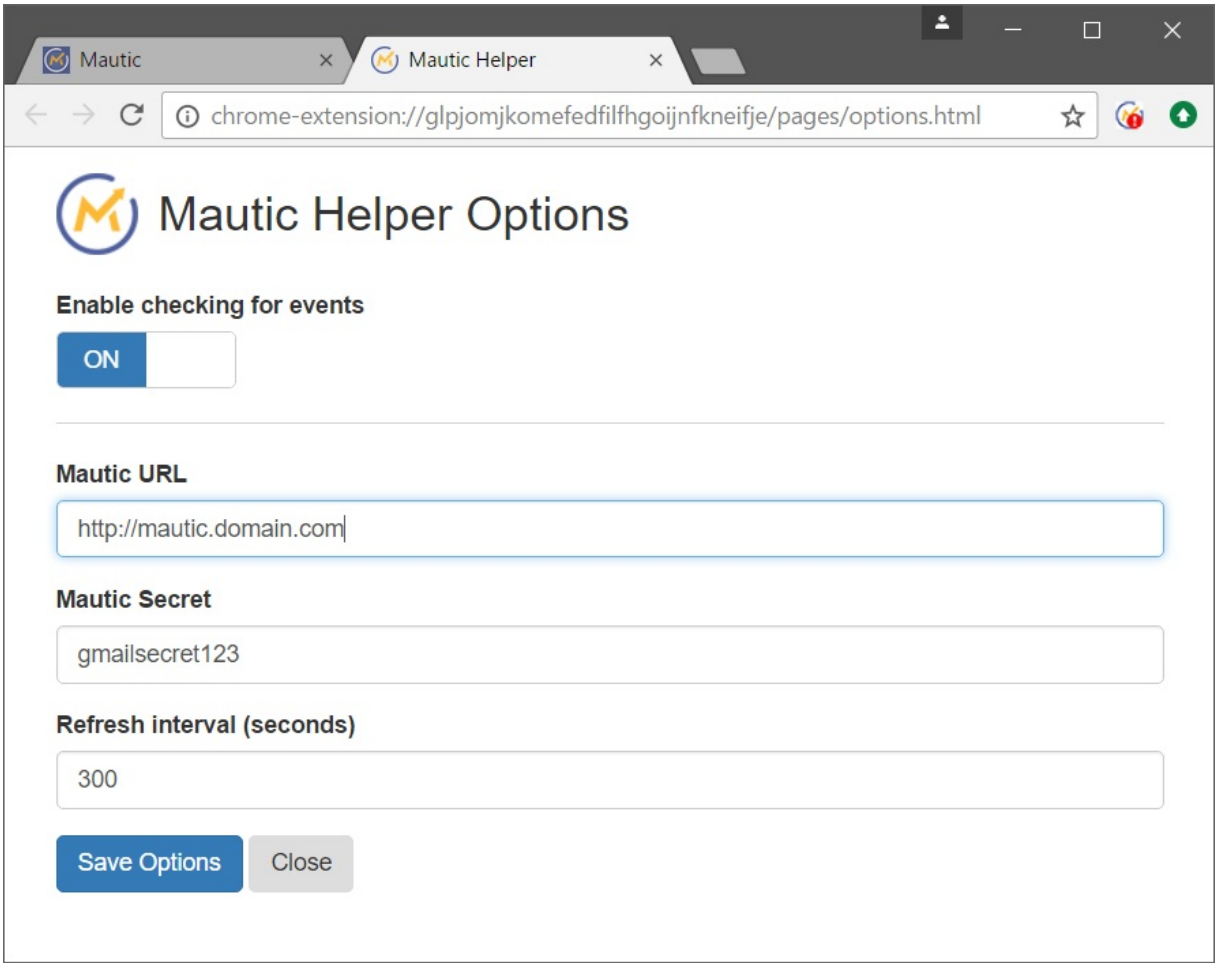
2. Click on the Gmail plugin button and enter a secret or key to validate the Mautic Helper Chrome Extension



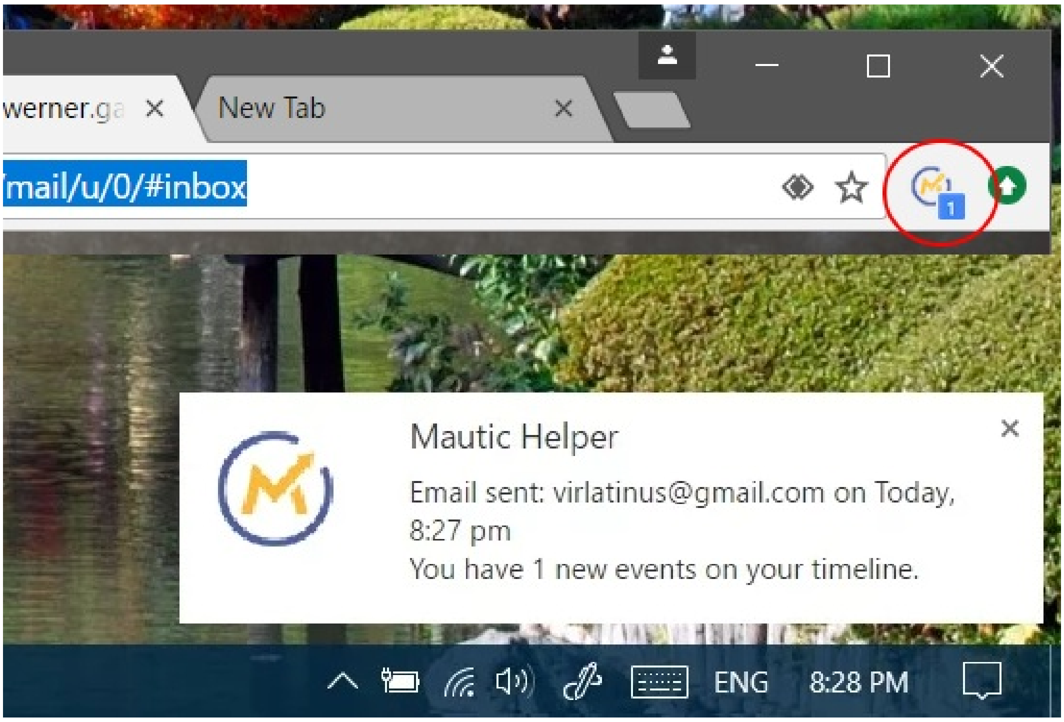
3. Install the Mautic Helper Chrome Extension from the Chrome Web Store



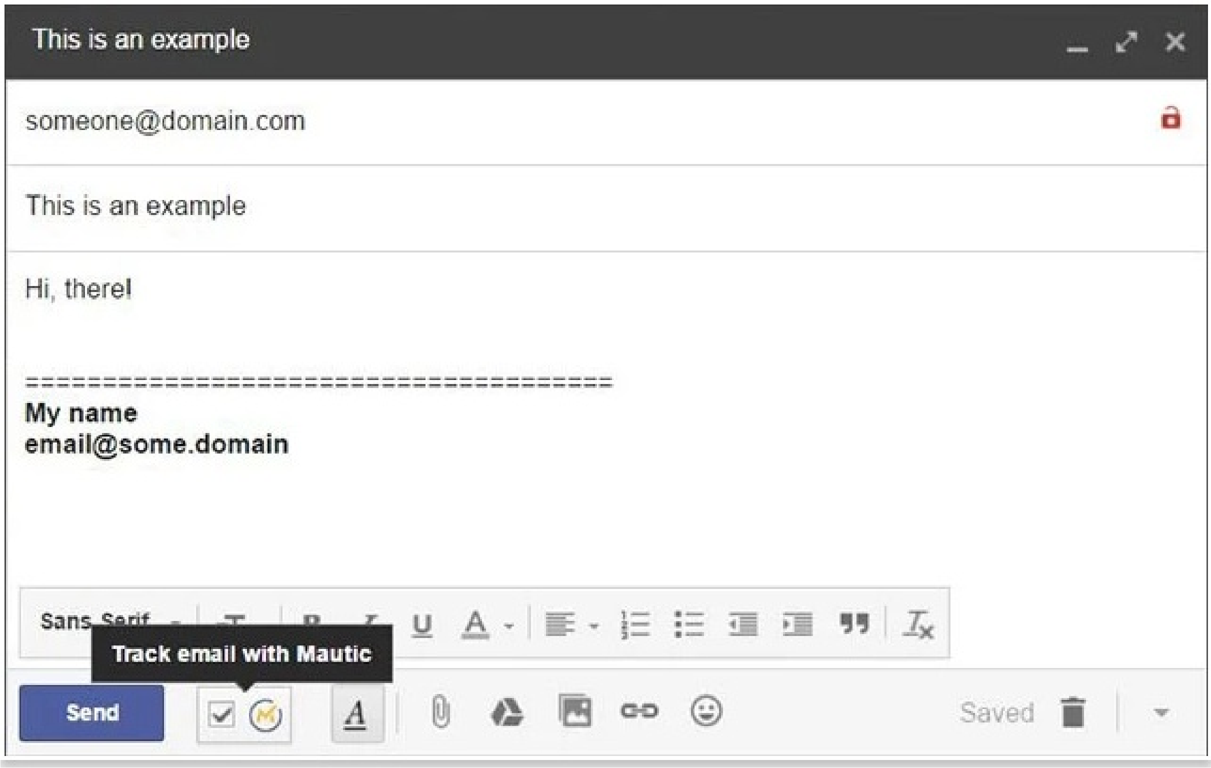
4. Configure the extension using the options page that will automatically be displayed. (Remember to use the same secret you entered in Mautic)



5. On the Chrome browser there will be a button that will notify of new events on the contacts timeline.

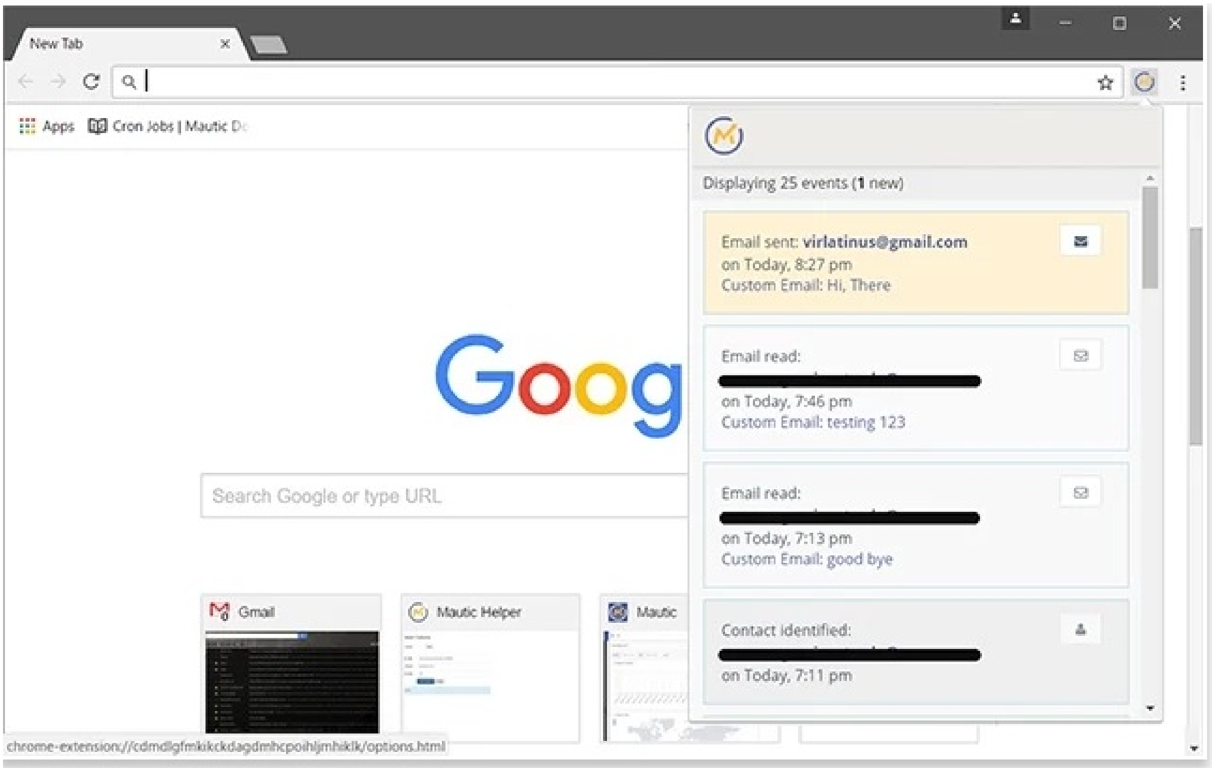


6. To track an email sent to a lead, click the Track Email button on the Compose window in Gmail



7. This will append a tracking GIF to the email with the following syntax: [[MAUTIC_URL]]/index.php/gmail/tracking.gif?d=H4sIAAAAAAAEAIVRTW%2FCMAz9LRyCtgNVlFBpHHroWsRuk8ak7RpaUzqaGCUp0H8%2Fpy0TH4dJUZy892w921uLOvkCa8BGK2WLWi2dt6pUbM7PYPEcFainoFXdJKdBVvUy4quA9rxrNz9Q%2BCQ16HdgmeAenKewpflU3lvflO6nGyy75HNXO8LQAN3984R2X5tqMpkwnjOejrfg19%2FBJlHBJsskS3M1MOvOedChUA5HaPBAsp54a7UyBH%2BAw9YWECRrsMc6PHvFd2iR0NfW1QbcjUDwMjhctYqqq0YxkQU6SqMhNxi85GeoD8p0134zaBom%2By4ezlPMxTPFeCH5TLzI%2BdgizeEu5alUQixmlubjSG5WAY8bC8kyC%2FvxSBX%2Flcvl3bT%2Fvr8k1oBgIQIAAA%3D%3D&sig=cf078d5b

8. The Mautic plugin will then validate the information using the secret to compare signatures and then attach that email to the contact’s profile as part of their activity history. If the lead or leads don't exist, they are created automatically



URL Parameter Length Issue

; Please note that PHP setups with the suhosin patch installed will have a
; default limit of 512 characters for get parameters. Although bad practice,
; most browsers (including IE) supports URLs up to around 2000 characters,
; while Apache has a default of 8000.

; To add support for long parameters with suhosin add the following to php.ini
suhosin.get.max_value_length = 5000

MailChimp integration

Mautic can send contacts to MailChimp upon some contact's action or when it gain some point limit.

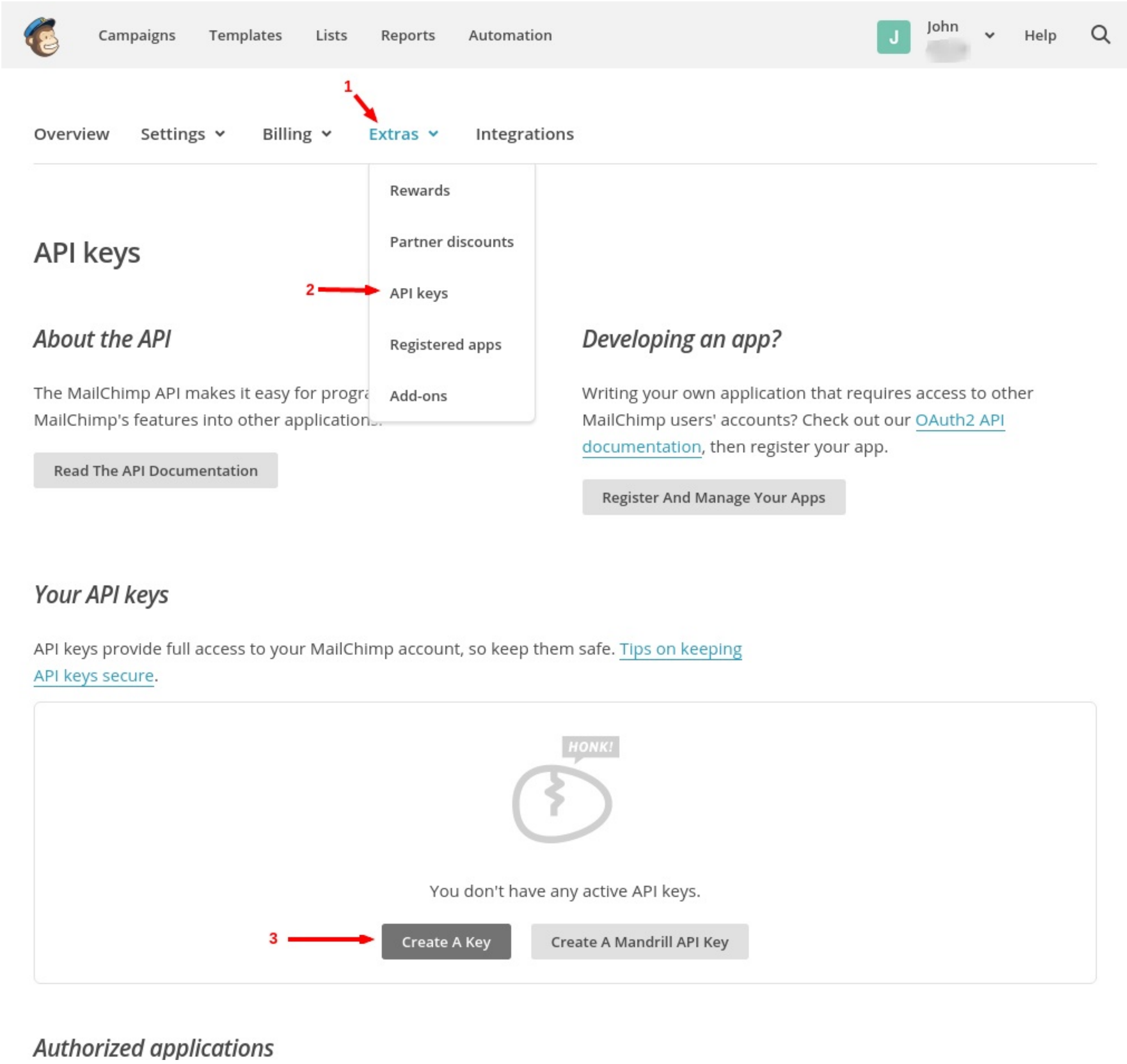
Version notes

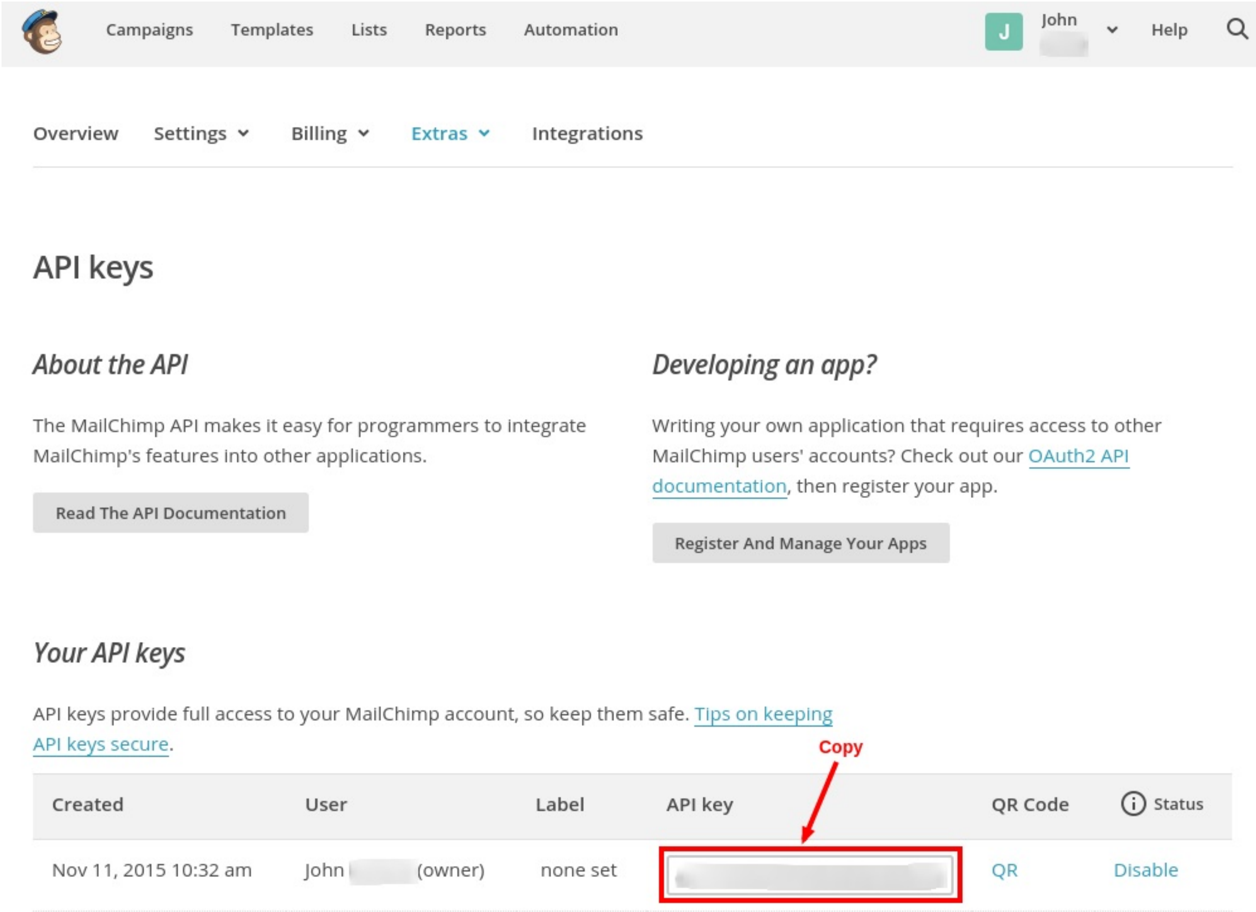
- For Mautic 1.2.2 and older, an MailChimp app has to be created and the authentication is made via oAuth2. Client key and secret credentials are needed for authentication. Also SSL (https) connection is required.
- For Mautic 1.2.3 and later, the authentication has been changed to the API key. This documentation covers this option. This plugin is backward compatible. If the client ID is filled, the plugin will use oAuth2. If the client ID is empty, the plugin will let you insert the API key.

Authorize

Get MailChimp API key

1. Create a MailChimp account if you don't have one already.
2. Go to *Account* / *Extras* / *API Keys* and create a new one.
3. Copy the created API Key.


Campaigns
Templates
Lists
Reports
Automation
J
John
Help
1
Overview
Settings
Billing
Extras
Integrations
Rewards
Partner discounts
2
API keys
Registered apps
Add-ons
API keys
About the API
The MailChimp API makes it easy for progra
MailChimp's features into other applications.
Read The API Documentation
Developing an app?
Writing your own application that requires access to other MailChimp users' accounts? Check out our OAuth2 API documentation, then register your app.
Register And Manage Your Apps
Your API keys
API keys provide full access to your MailChimp account, so keep them safe. Tips on keeping API keys secure.
HONK!
You don't have any active API keys.
3
Create A Key
Create A Mandrill API Key
Authorized applications



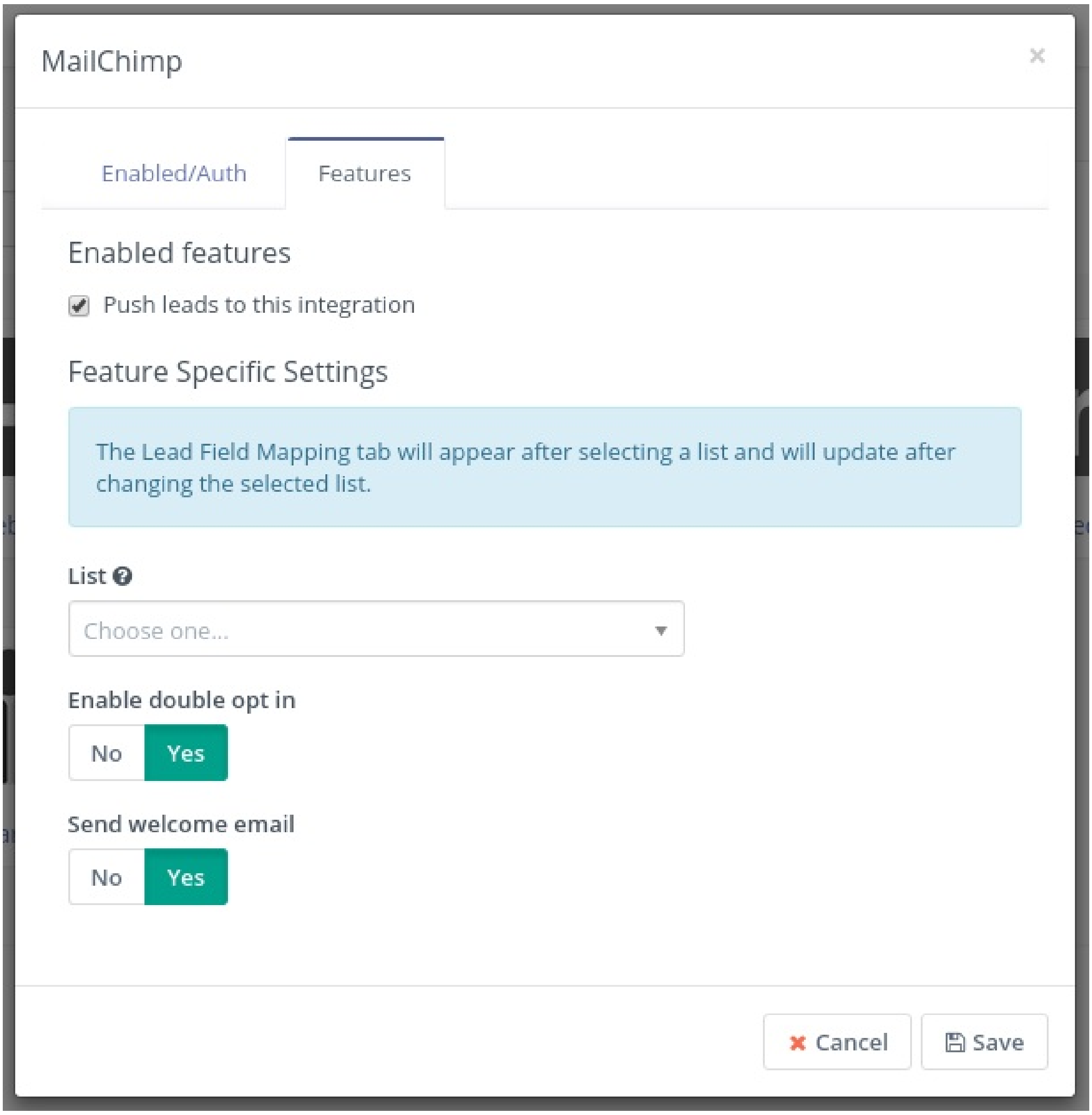
Authorize Mautic - MailChimp plugin

Fill in the **username** you use to log in to MailChimp and the **API key**. Save the plugin.

Configure the plugin

Navigate to the *Features* tab in the plugin configuration modal box. You should see this note:

> The Contact Field Mapping tab will appear after selecting a segment and will update after changing the selected segment.



Select the segment then. If you don't have a segment in MailChimp created yet, go to *MailChimp dashboard* / *Segments* / *Create List* and create one. Then save the plugin configuration and open it again. The *Contact Field Mapping* tab should appear now. Configure the field mapping.

Other configuration options are:

- **Push contacts to this integration** - This option is checked by default. If you uncheck it, the plugin will not push contacts to MailChimp any more.
- **Enable double opt in** - If MailChimp should send a confirmation email to the contacts added by this plugin. The contacts will have to confirm that they really want to be added to the segment.
- **Send welcome email** - Whether MailChimp should send the welcome email.

Test the plugin

Follow these steps to test the integration.

Mautic - Outlook plugin

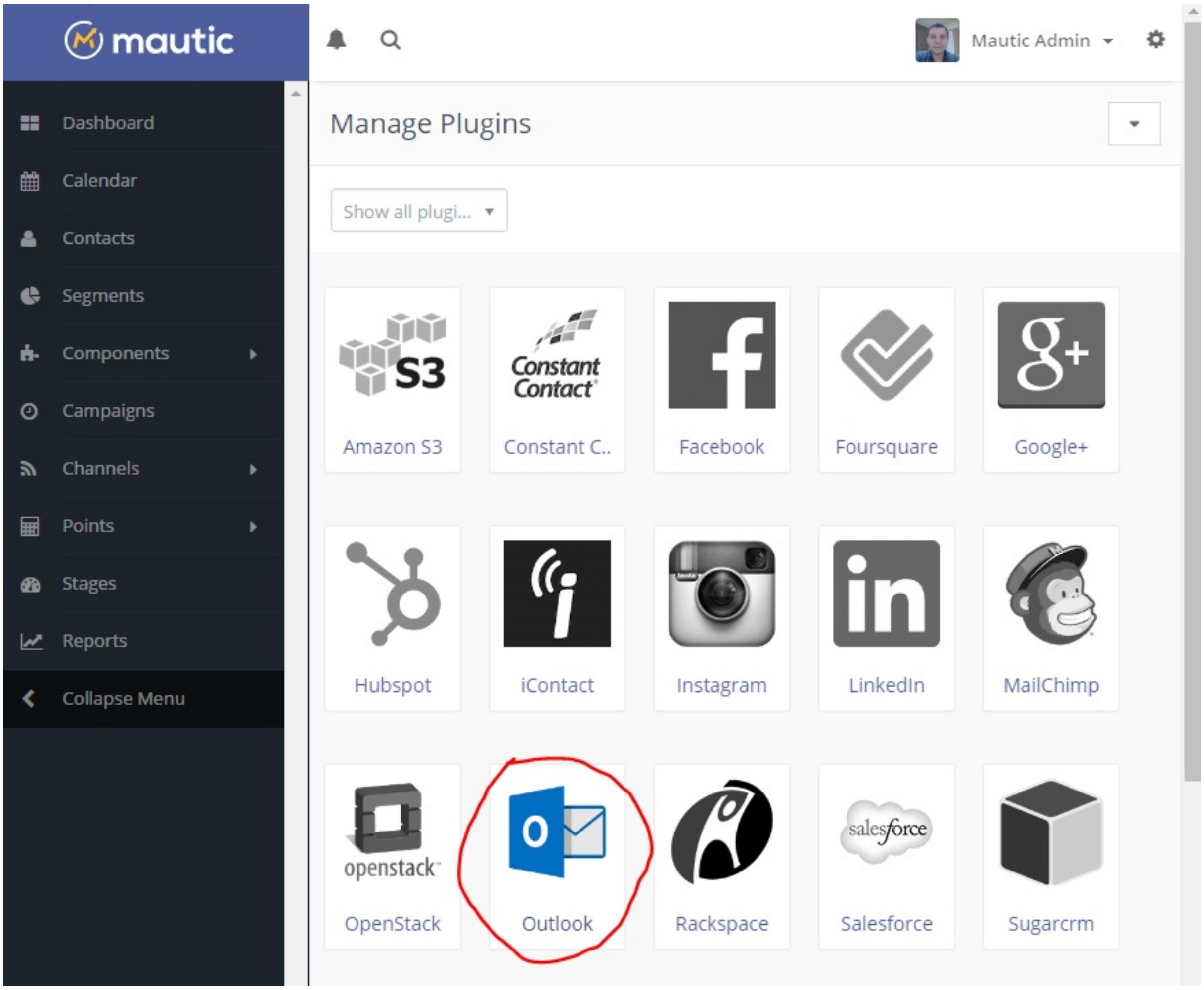
This plugin allows for the Outlook Add-In to keep track of emails sent to leads. If it does not show up in the list of plugins - click the Install/Upgrade Plugins.

Requirements

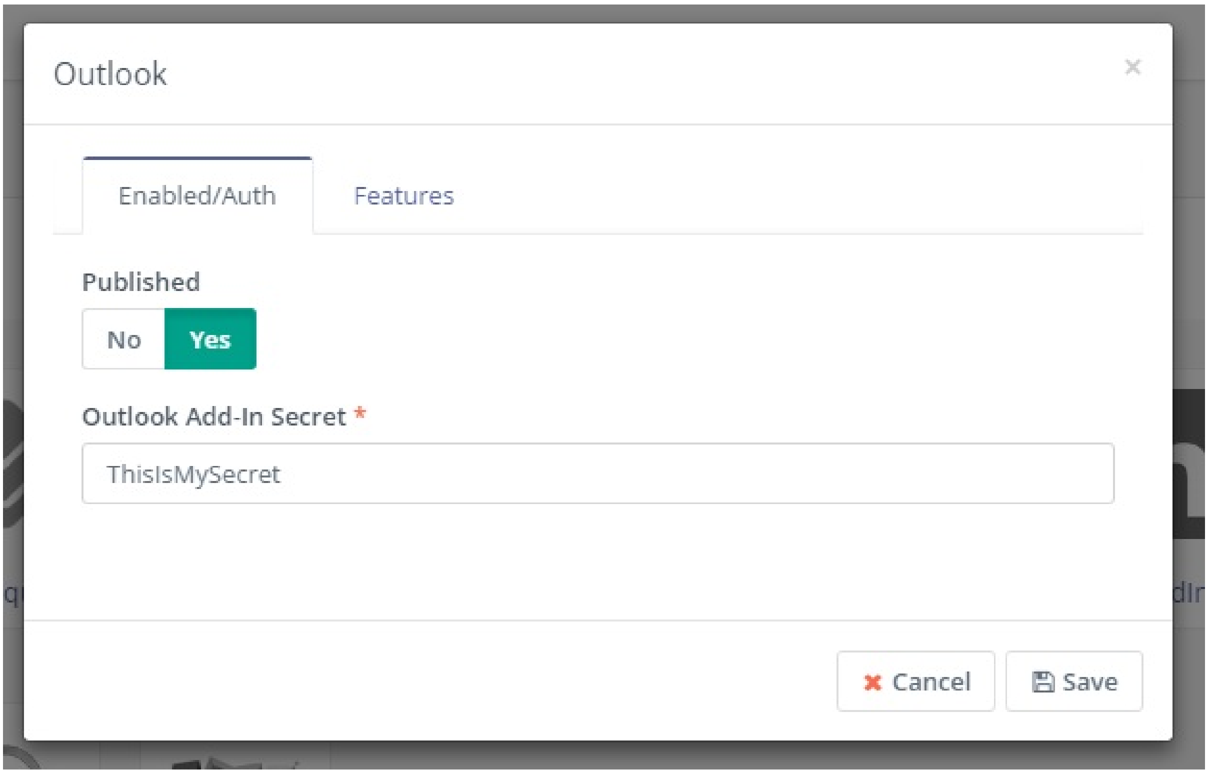
- Mautic installed on a publicly accessible URL.
- Microsoft Outlook 2016.
- Mautic Outlook Add-In for Outlook 2016

Configure the plugin

1. Install the Mautic plugin as usual. It will appear on the plugins page in Mautic.

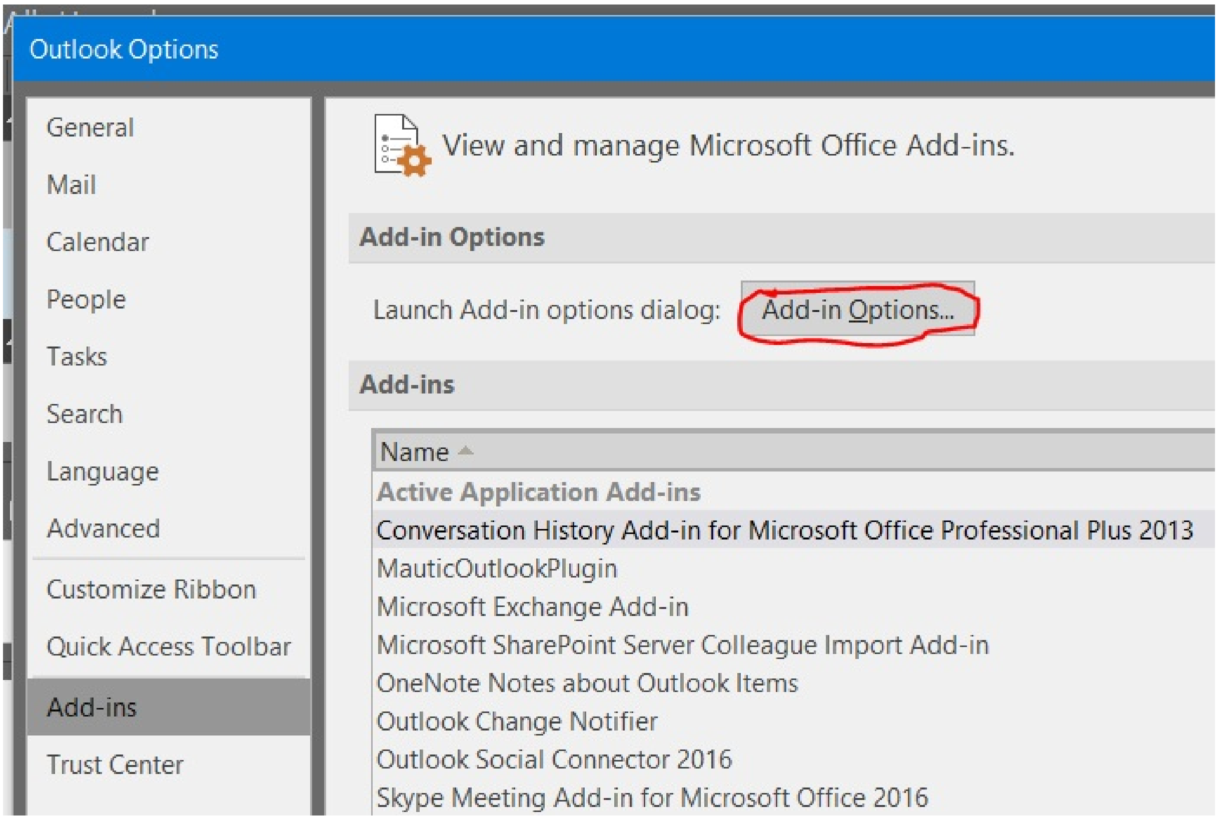


2. Click on the Outlook plugin button and enter a secret or key to validate the Outlook Add-In

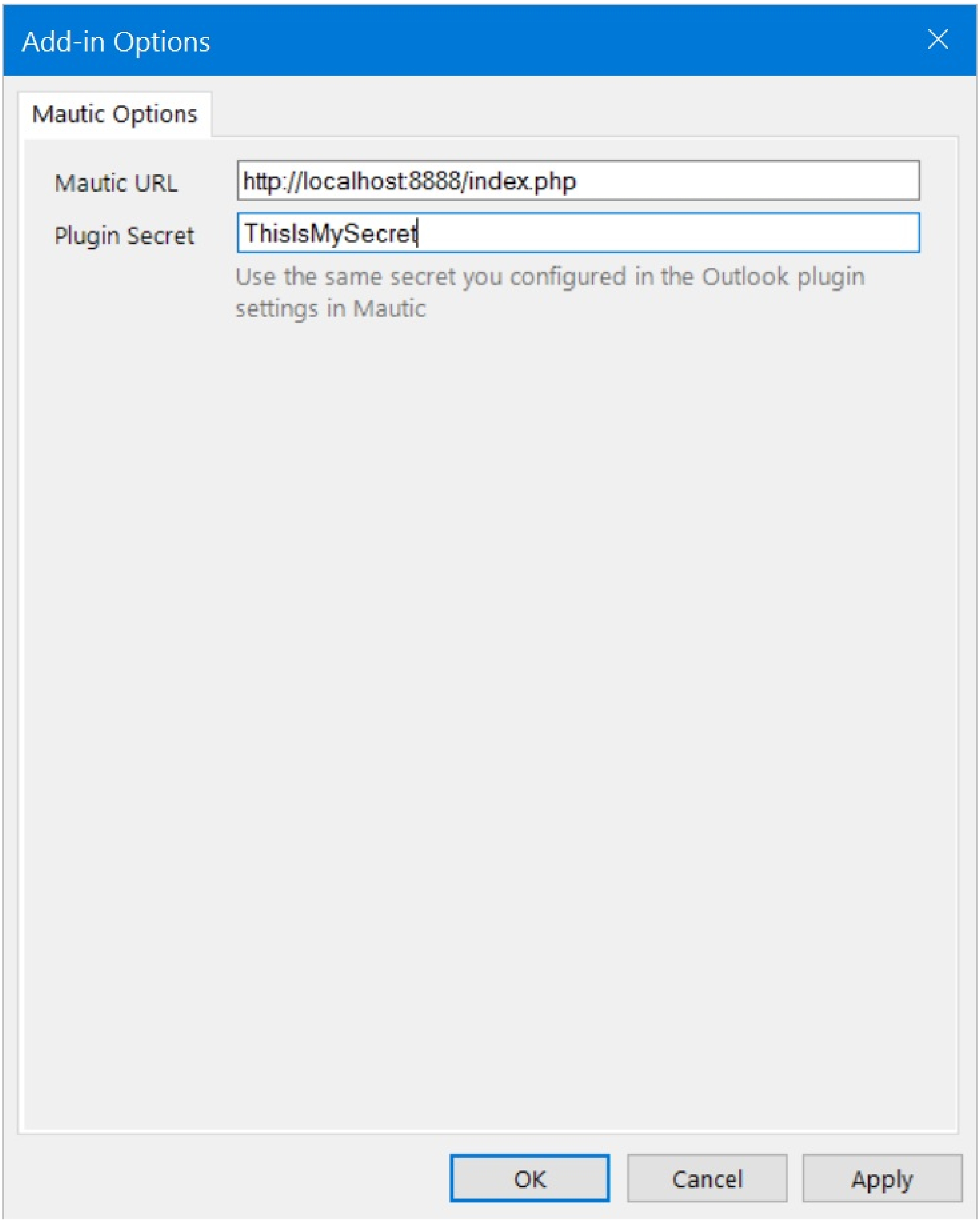


3. Run the Mautic Outlook Add-In Installer on a Windows machine with Outlook 2016

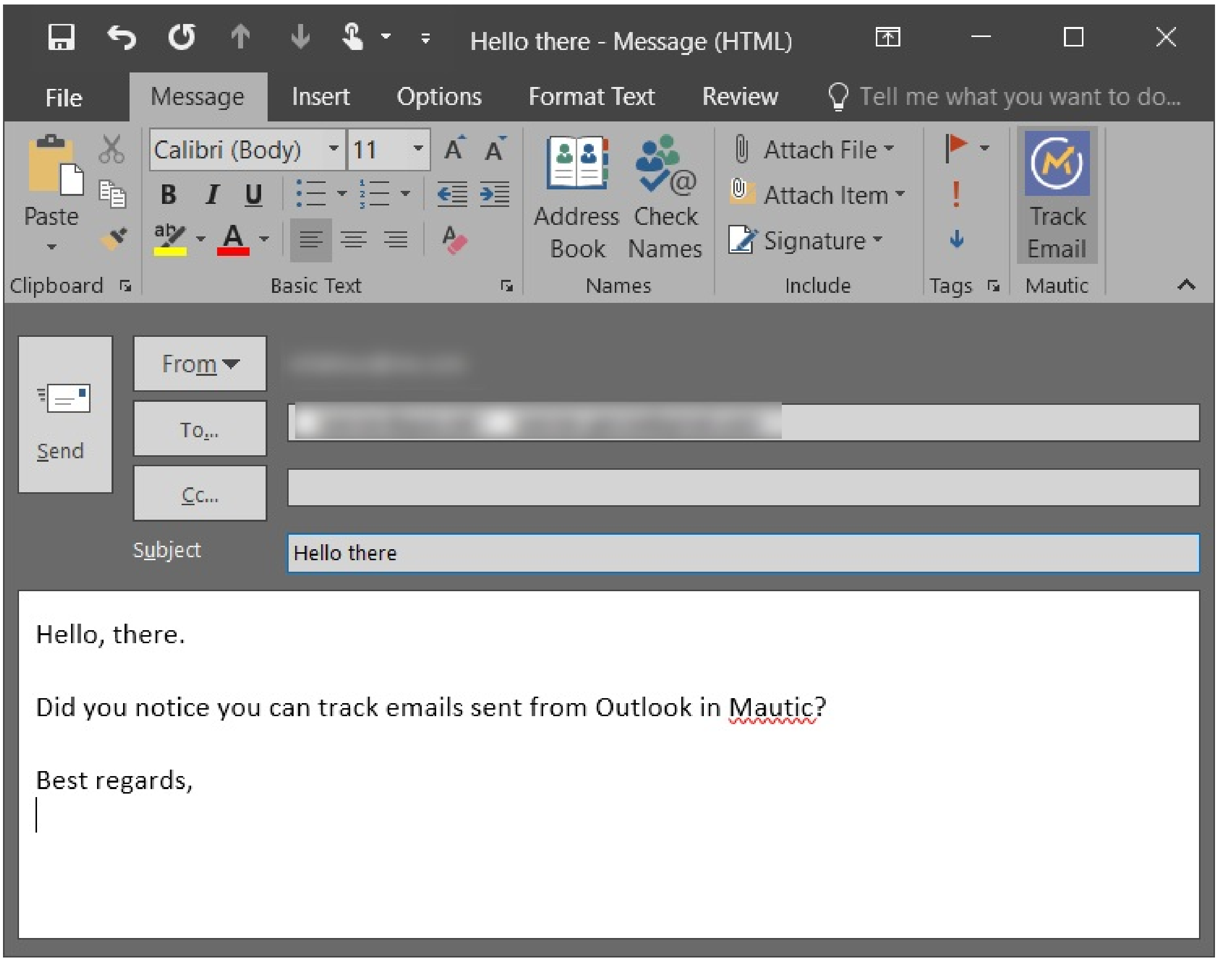
4. On the Outlook 2016 Options window, select Add-Ins and click on the Add-In Options button



5. Type in the URL of the Mautic application, the same secret you used on the Mautic plugin page and click OK

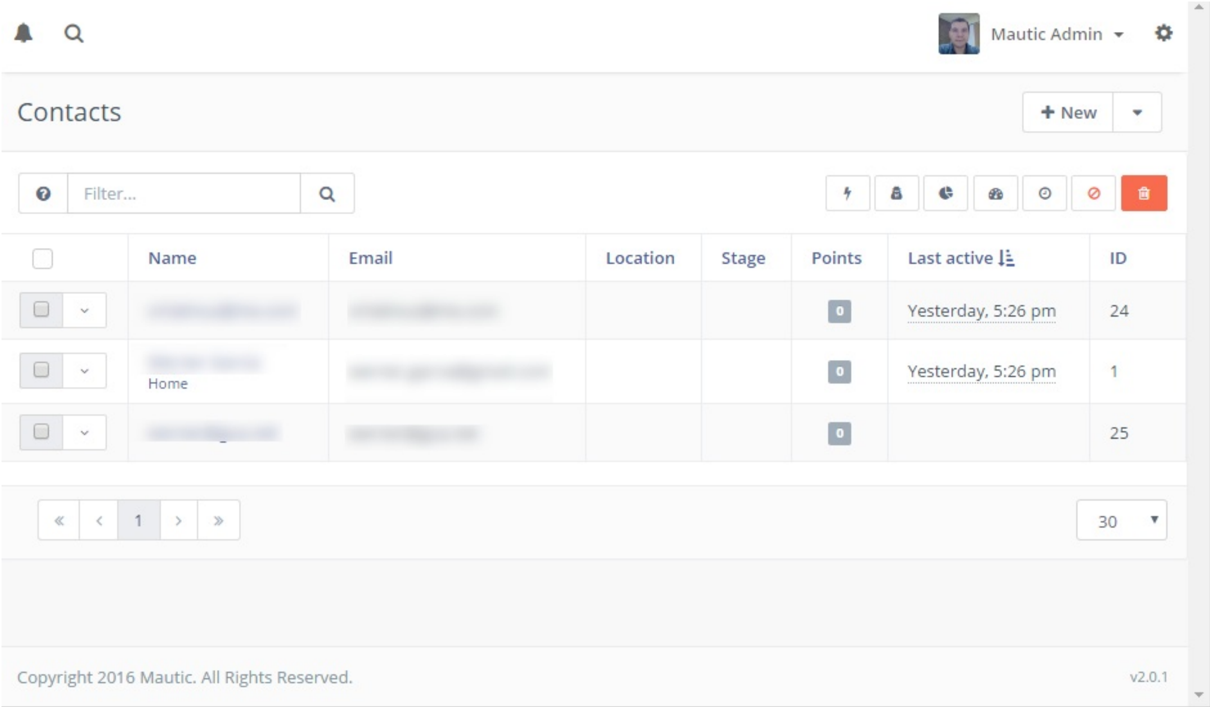


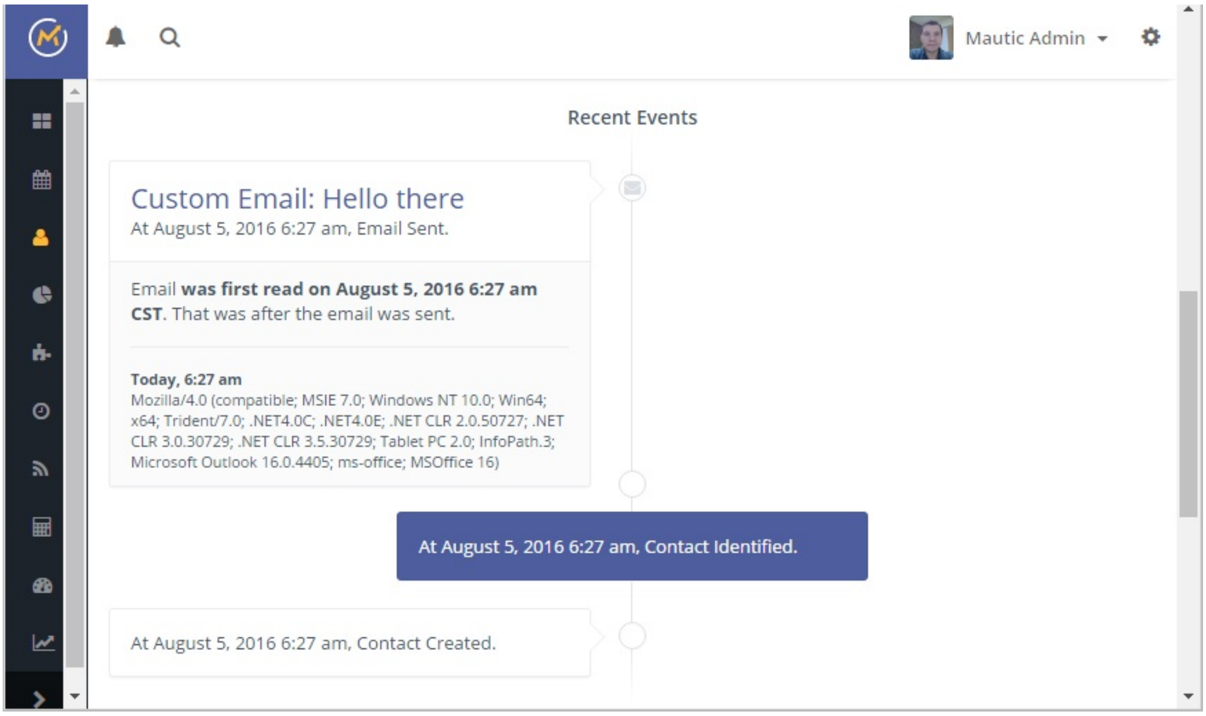
6. To track an email sent to a lead, click the Track Email button on the New Email window



7. This will append a tracking GIF to the email with the following syntax: [[MAUTIC_URL]]/index.php/outlook/tracking.gif?d=H4sIAAAAAAAEAIVRTW%2FCMAz9LRyCtgNVlFBpHHroWsRuk8ak7RpaUzqaGCUp0H8%2Fpy0TH4dJUZy892w921uLOvkCa8BGK2WLWi2dt6pUbM7PYPEcFainoFXdJKdBVvUy4quA9rxrNz9Q%2BCQ16HdgmeAenKewpflU3lvflO6nGyy75HNXO8LQAN3984R2X5tqMpkwnjOejrfg19%2FBJIHBJsskS3M1MOvOedChUA5HaPBAsp54a7UyBH%2BAw9YWECRrsMc6PHvFd2iR0NfW1QbcjUDwMjhctYqqq0YxkQU6SqMhNxi85GeoD8p0134zaBom%2By4ezlPMxTPFeCH5TLzl%2BdgizeEu5aIUQixmlubjSG5WAY8bC8kyC%2FvxSBX%2Flcvl3bT%2Fvr8k1oBgIQIAAA%3D%3D&sig=cf078d5b

8. The Mautic plugin will then validate the information using the secret to compare signatures and then attach that email to the contact’s profile as part of their activity history. If the lead or leads don't exist, they are created automatically





URL Parameter Length Issue

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; most browsers (including IE) supports URLs up to around 2000 characters,
; while Apache has a default of 8000.

; To add support for long parameters with suhosin add the following to php.ini
suhosin.get.max_value_length = 5000

Mautic - Salesforce CRM plugin

This plugin can push a contact to Salesforce CRM when a contact makes some action. If you don't have the Salesforce CRM account yet, create it.

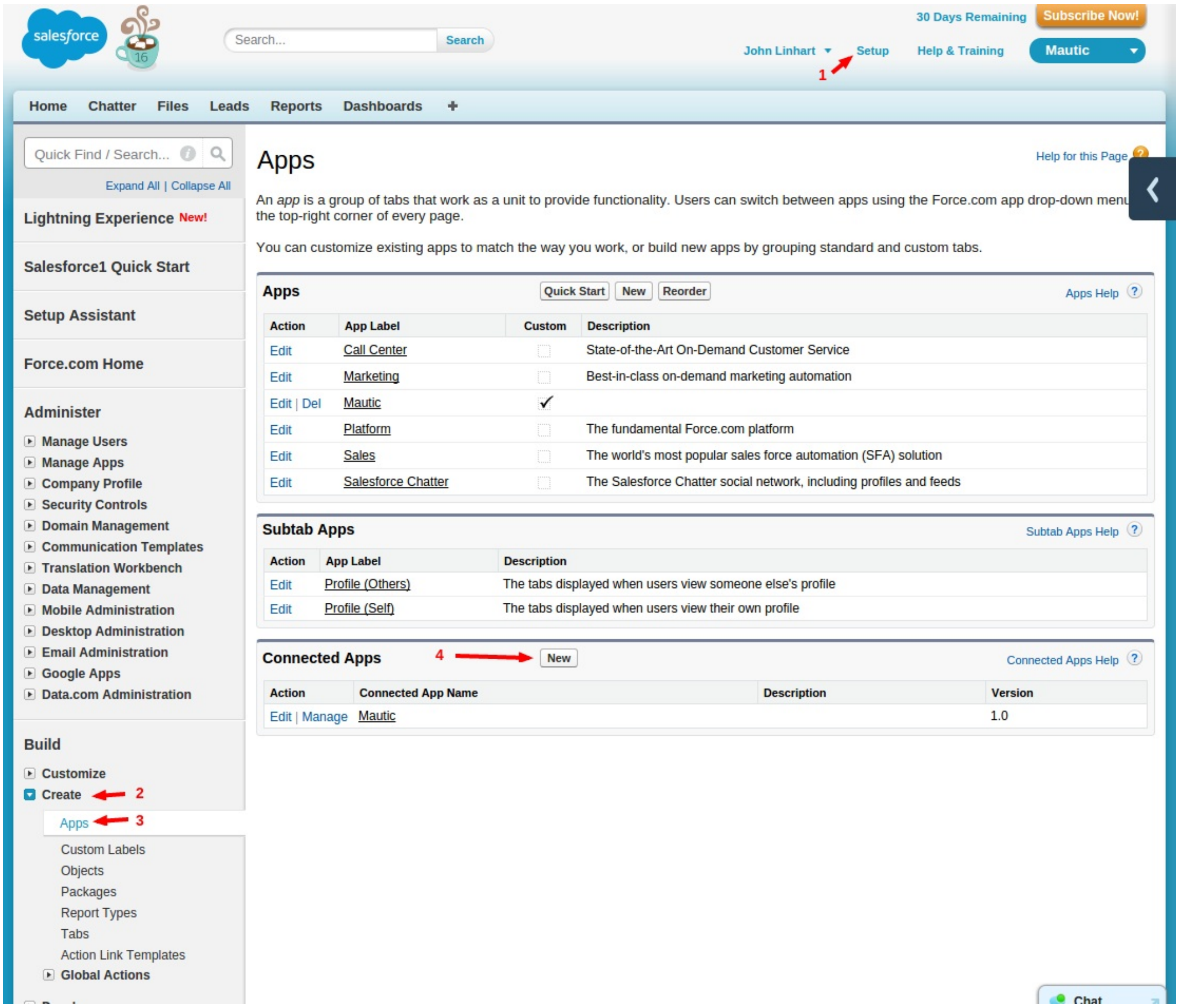
Requirements

SSL. Your Mautic instance has to run on https. Salesforce will not allow you to create an App with just an http callback URL.

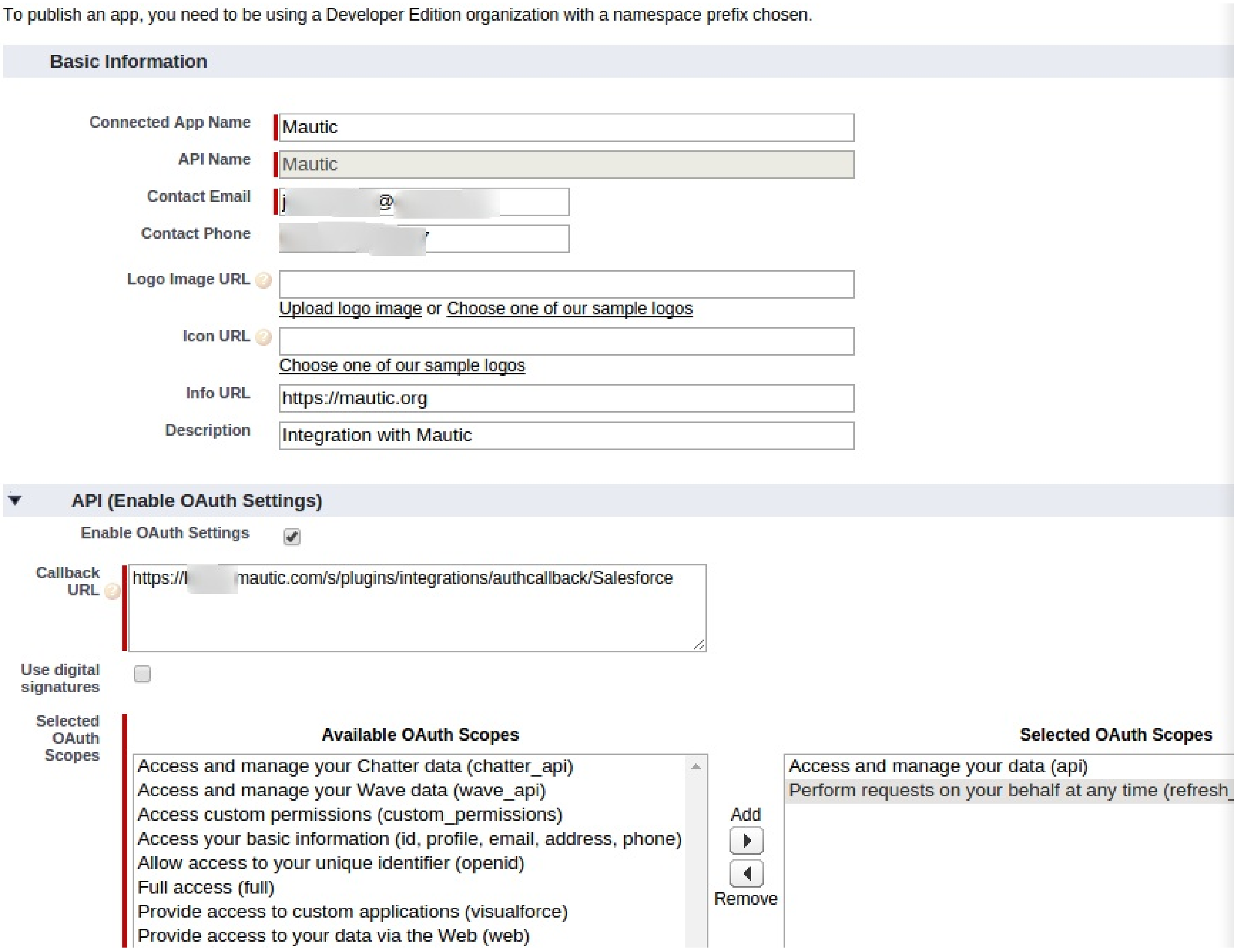
Get the Salesforce client credentials

There is an official documentation about how to get the Key and Secret although it doesn't seem to be updated.

Go to: *Setup* (top right corner) / Build (bottom left corner) - Create / Apps / Connected Apps / New

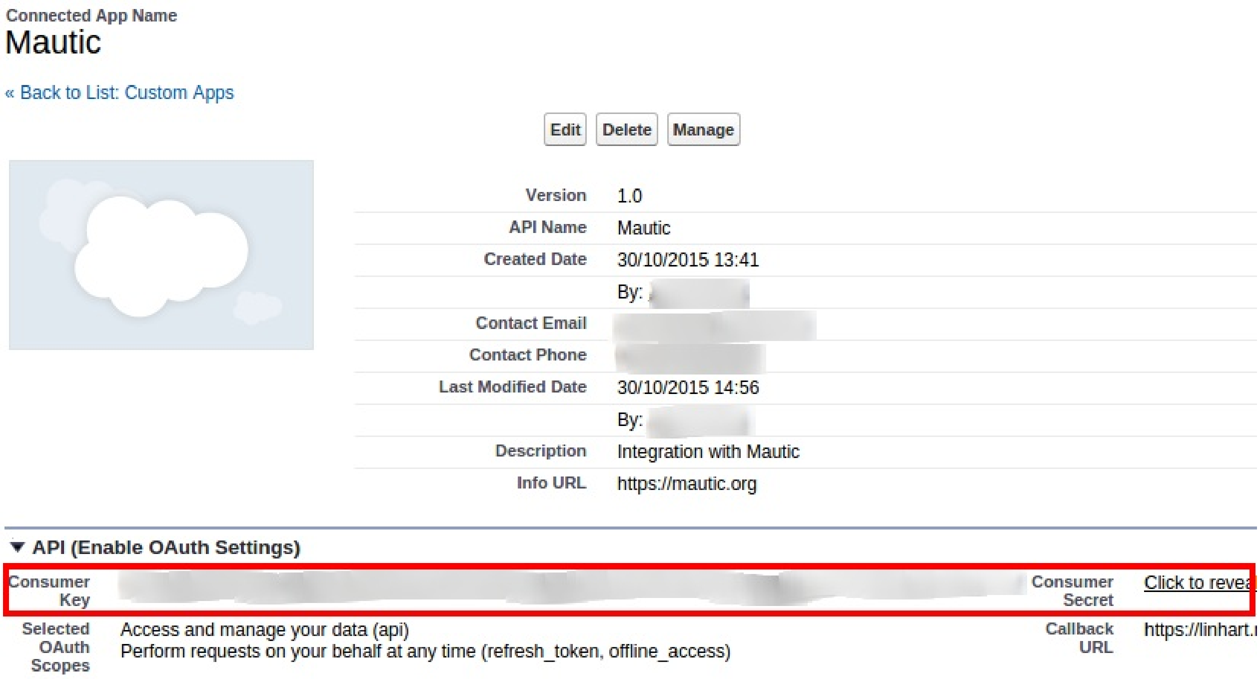


Create a new app like this:



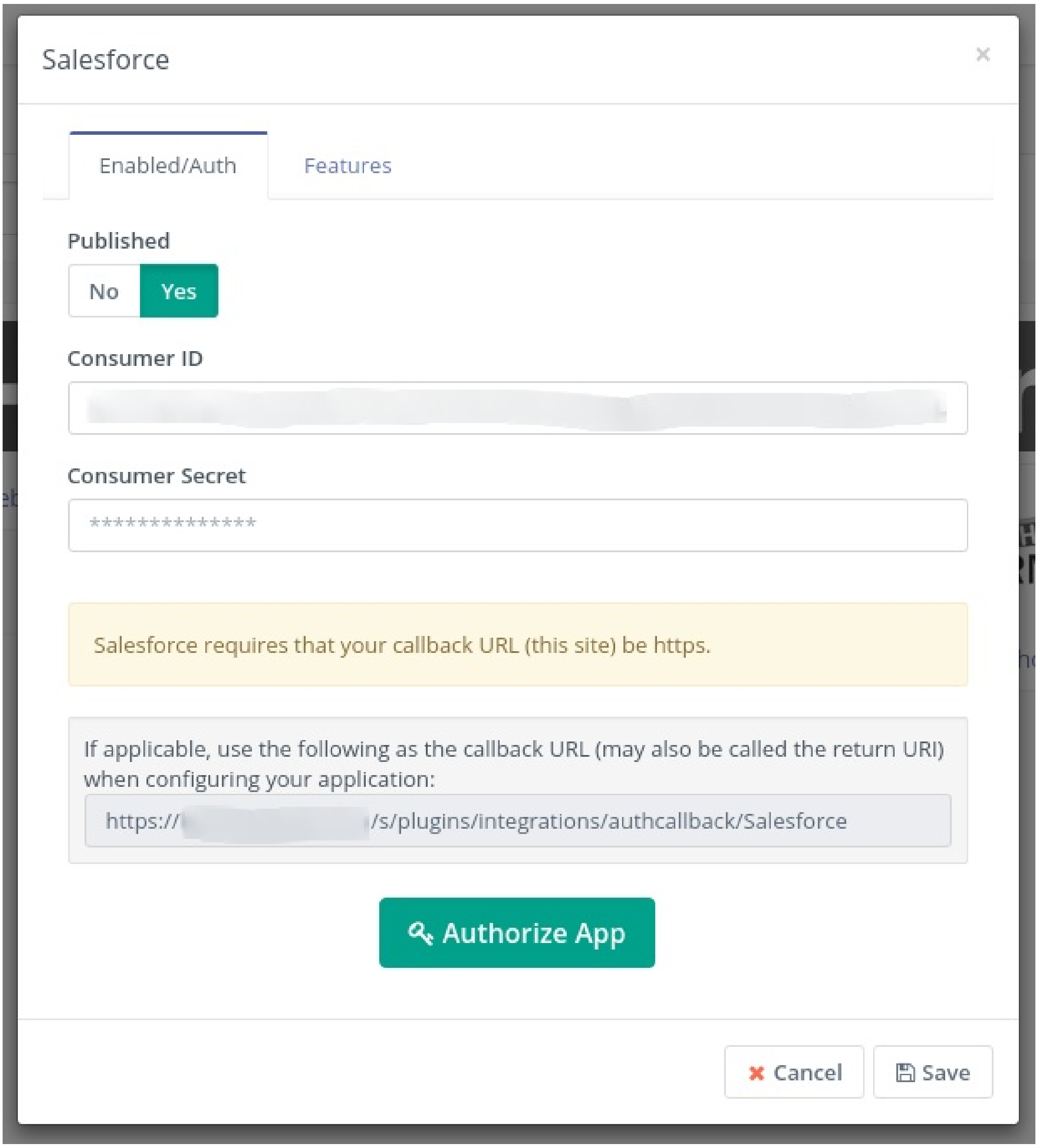
Make sure the Selected OAuth Scopes are *Access and manage your data (api)* and *Perform requests on your behalf at any time (refresh_token, offline_access)*.

Copy the Consumer Key and Secret.



Configure the Mautic Salesforce plugin

Insert the keys to the Mautic Salesforce plugin and authorize it.



Configure the field mapping. Formula fields from salesforce will be pulled and can be saved into a Mautic custom field. Salesforce lead's Id can be matched with a mautic custom field.

Features

Enabled features: You can pull leads and/or push leads from and to the integration.

Push leads is done through a form or a campaign.

Pull leads is done through command line and it can be setup as a cronjob.

Feature specific settings: Select the objects you wish to pull or push records from. You can push contacts to the Leads object in salesforce. You can also push activities (contact's timeline records) to a custom object in salesforce.

Pulling records will be done from Leads and/or Contacts objects in records and Accounts from Salesforce will be pulled into Mautic companies.

Updating of a Contact's Owner can be be enabled by turning on *Update Contact Owner*. This is not enabled by default. In order for a Contact in Mautic to match a User in Salesforce the email addresses in the two systems must be identical.

Command line script to pull records from Salesforce

To pull records from salesforce you need to use a command from CLI. Use this command:

Used to pull records from the Leads object in Salesforce

- php app/console mautic:integration:fetchleads

Used to push activities to the Salesforce custom object described below

- mautic:integration:pushleadactivity

Parameters both commands take:

--time-interval This parameter is used to setup the amount of time we want to pull records from. Possible entries: "10 days", "1 day", "10 minutes", "1 minute". Maximum time interval "29 days".

--integration=Salesforce to use with salesforce integration. In future this command may be used for other integrations.

Setting up Mautic's custom object in Salesforce

To be able to push activities to the salesforce integration you first need to setup a custom object in your salesforce instance. Please setup the object as it is described below. (Note: these are two underscores with no space between - not rendered well in Github).

Custom object name: Mautic__timeline (API name: Mautic_timeline__c)

API names of fields:

- ActivityDate__c : Date/Time
- contact_id__c : Lookup(Contact)
- Description__c : Long Text Area(131072)
- WhoId__c : Lookup(Lead)
- MauticLead__c : Number(18, 0) (External ID)
- Mautic_url__c : URL(255)
- ReferenceId : Text(255)

Test the plugin

Follow these steps to test the integration.

Troubleshooting

Error: `The REST API is not enabled for this Organization.`

This means the API is not turned on in your Salesforce account. Read more

Mautic - vtiger CRM plugin

This plugin can push a contact to the vTiger CRM when a contact makes some action.

If you don't have a vTiger CRM account yet, create it.

Authenticate the vTiger plugin

To authenticate the Mautic plugin to be able to communicate with vTiger CRM you'll need these credentials:

- **vTiger URL** - the base (root) URL starting with http:// or https:// where your vTiger instance runs. For example `https://your_vtiger.od2.vtiger.com`.
- **vTiger username** - The username (email address usually) which you use to log in to your vTiger.
- **vTiger access key** - The access key published in your vTiger profile. To get it, go to vTiger's *My Preferences*. The *Access Key* hash is at the bottom of the page.

Fill these 3 credentials to the Mautic plugin and click Authenticate.

Configure the vTiger CRM plugin

If you want to use the plugin, you have to publish it. Set the *Publish* switch to *Yes*.

In the Features tab is just *Push contacts to this integration* checkbox and it is checked by default.

Configure the field mapping.

Save the plugin configuration.

Test the plugin

Follow these steps to test the integration.

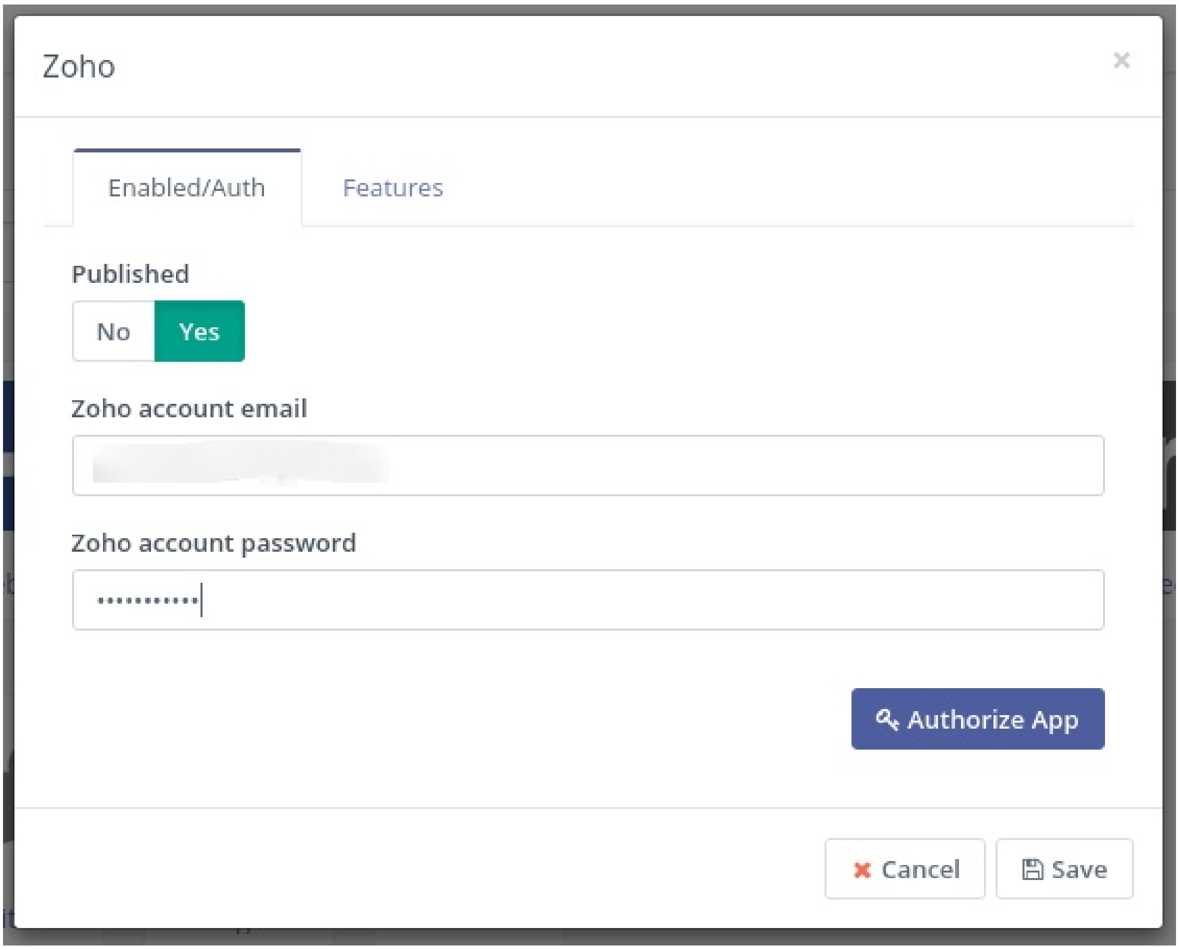
Mautic - Zoho CRM plugin

This plugin can push a contact to Zoho CRM when a contact makes some action.

If you don't have a Zoho CRM account yet, create it.

Configure the Zoho CRM plugin

Insert the email and password you created the Zoho account with into the Mautic Zoho integration plugin and authorize it. Set the *Publish* switch to *Yes*. Save.



If Zoho Two Factor Authentication is enabled, an Application Specific Password will need to be generated and used. (https://www.zoho.com/mail/help/adminconsole/two-factor-authentication.html#alink5)

In the Features tab is just *Push contacts to this integration* checkbox and it is checked by default.

Configure the field mapping.

Save the plugin configuration.

Test the plugin

Follow these steps to test the integration.

Warning concerning language configuration

Your Zoho and Mautic accounts must be **configured in English language**, otherwise the synchronization won't work. Zoho changes the alias of each of the contact fields depending on the language, which generates unmatching fields and errors on sync.

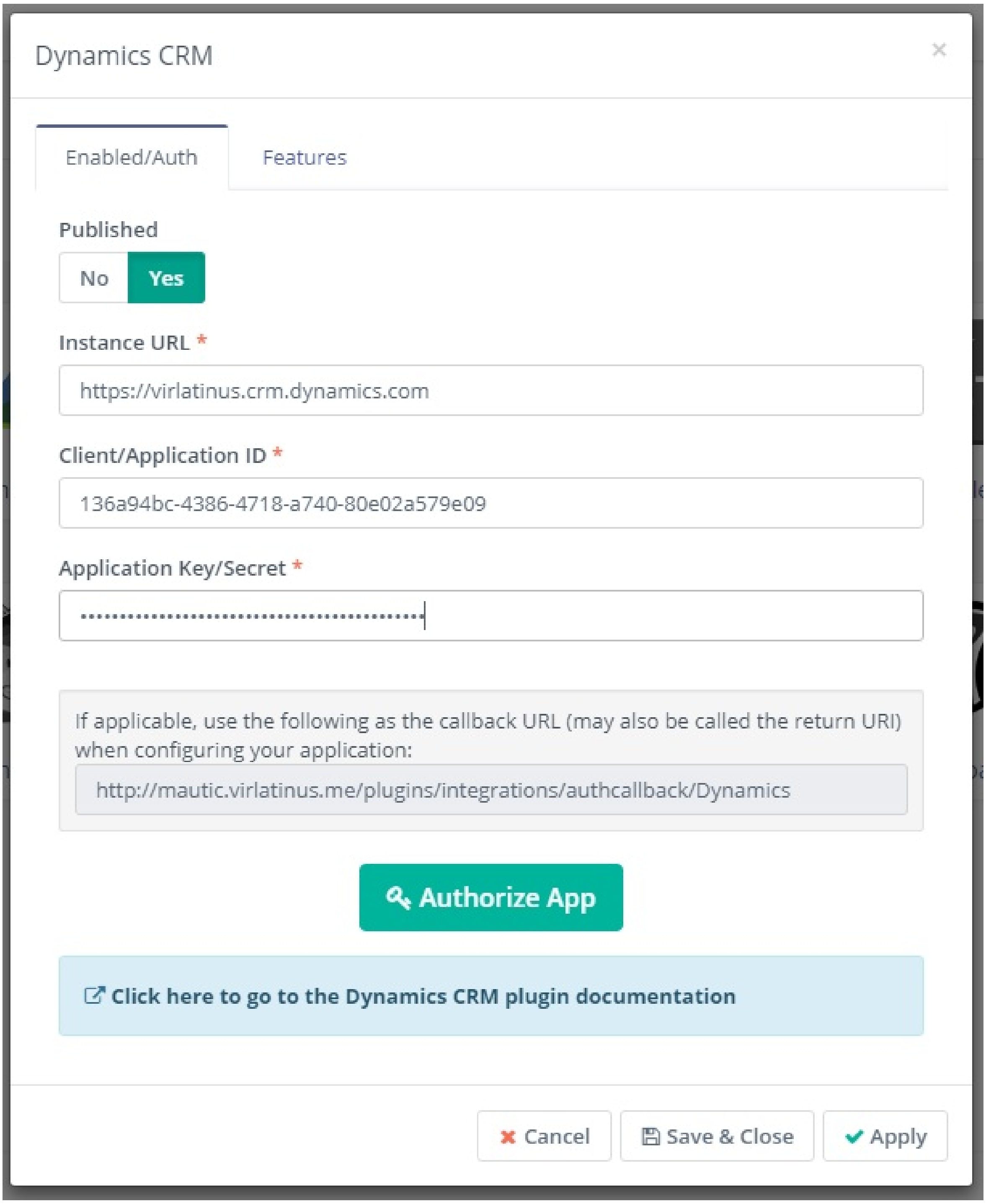
Mautic - Microsoft Dynamics CRM bi-directional plugin

This plugin can push/pull contacts to and from Dynamics CRM when a contact makes some action and when manually executing the sync leads command.

If you don't have a Dynamics CRM account, follow the instructions below to create a Trial Dynamics 365 account.

Configure the Dynamics CRM plugin

Insert your Dynamics CRM URL, the Application ID and Secret into the Mautic Dynamics integration plugin and authorize it. Set the *Publish* switch to *Yes*. Save.



Select the features you like in the Features tab. *Push contacts to this integration* checkbox is checked by default.

Configure the field mapping.

Save the plugin configuration.

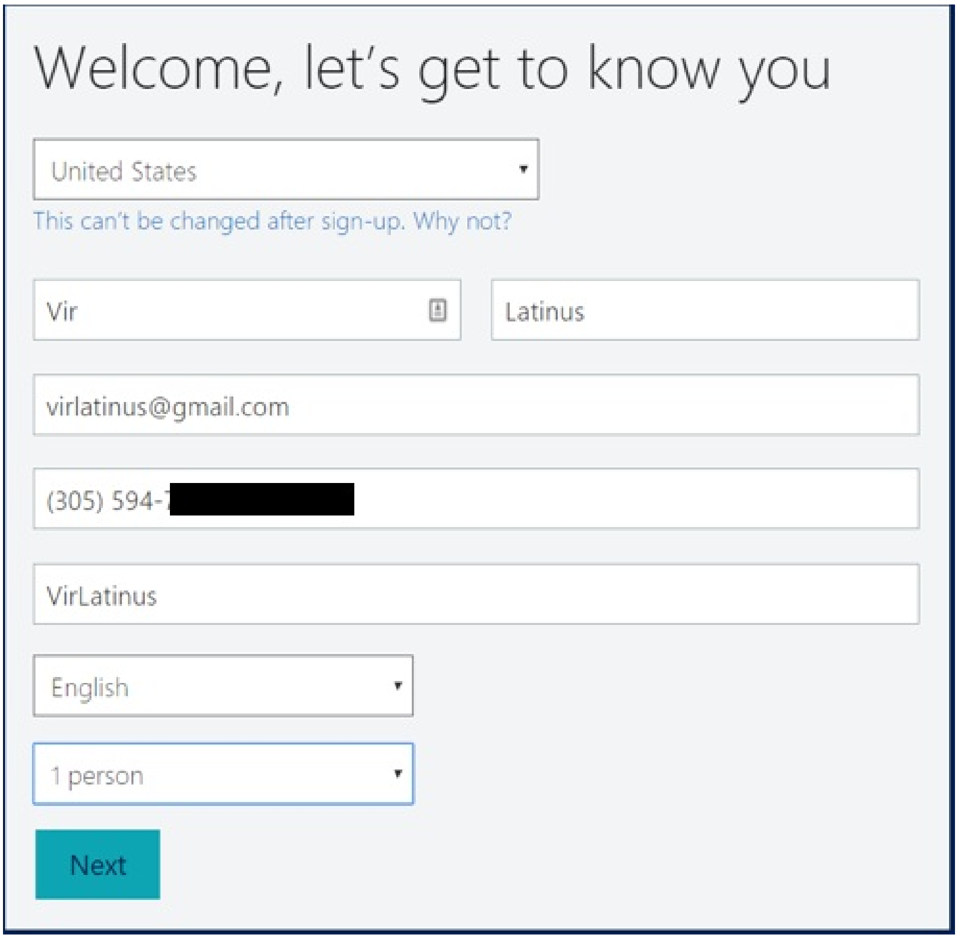
Test the plugin

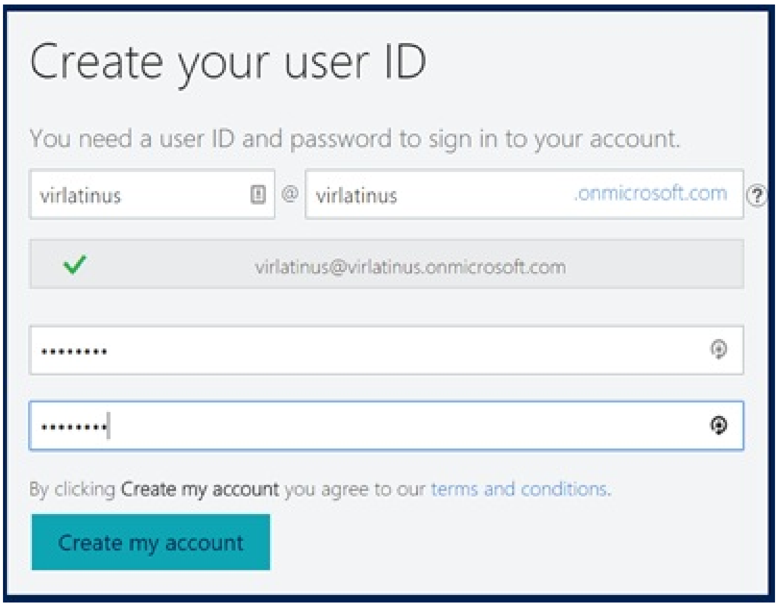
Follow these steps to test the integration.

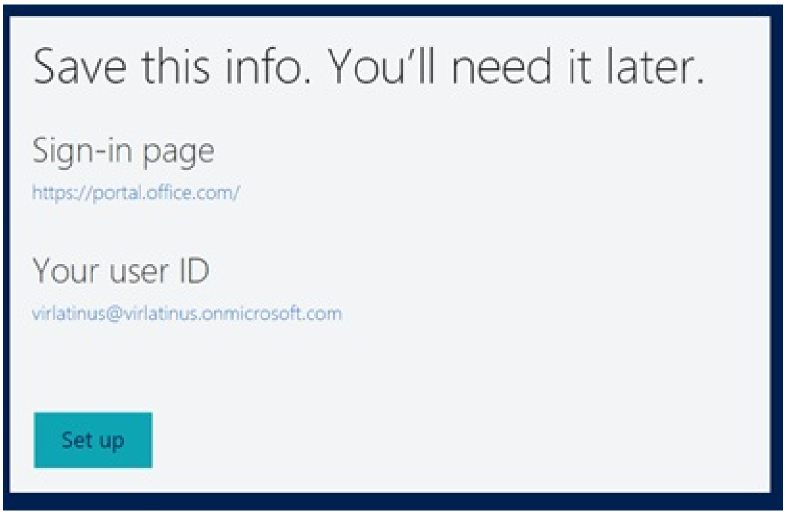
How to create a Dynamics 365 Trial account

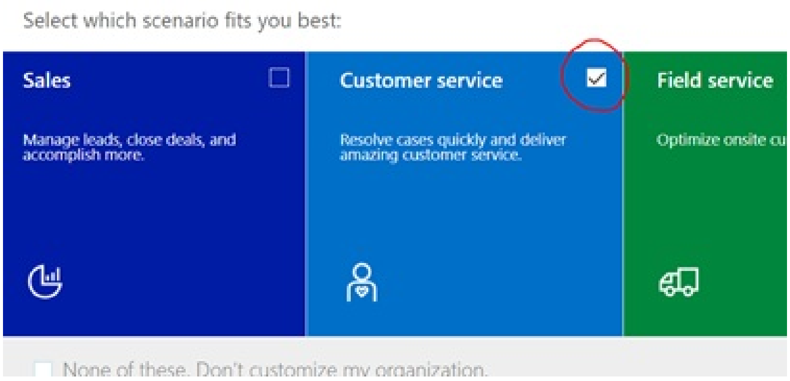
Set Up Dynamics 365:

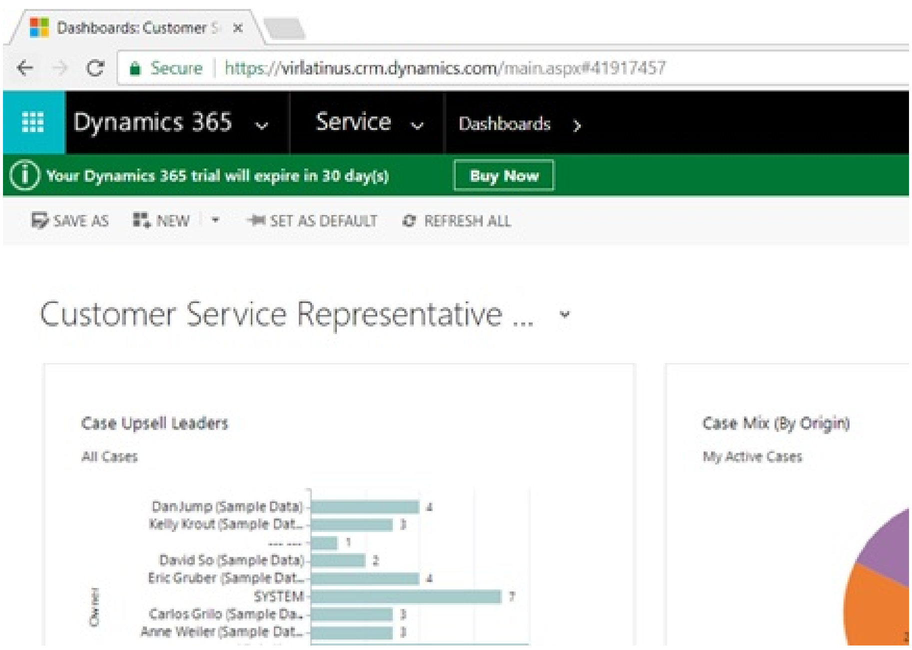
1. Go to the Dynamics 365 Trial website





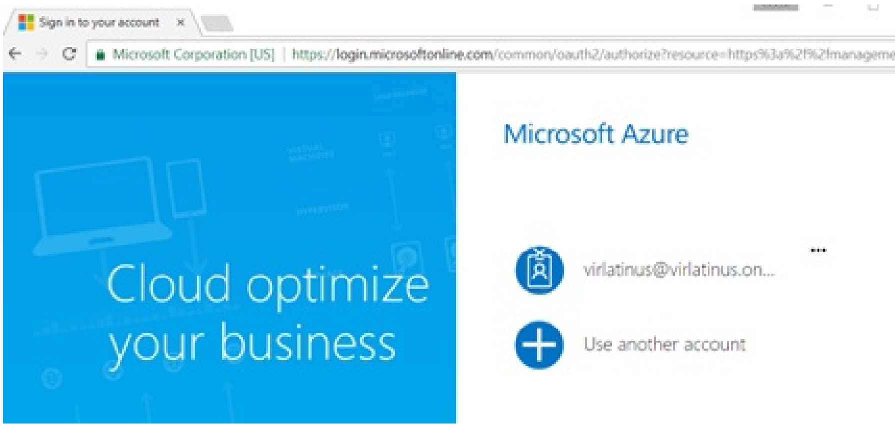




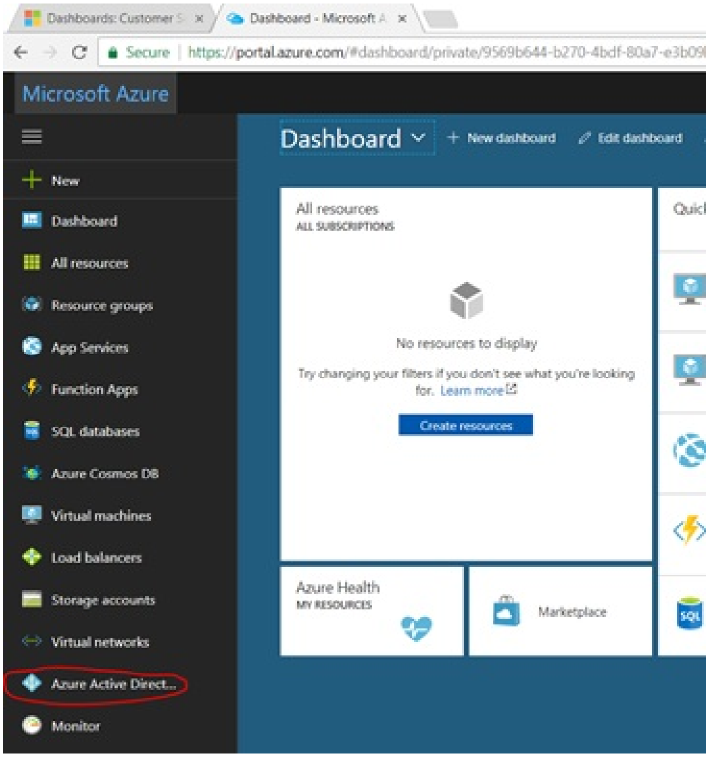


Set Up Azure

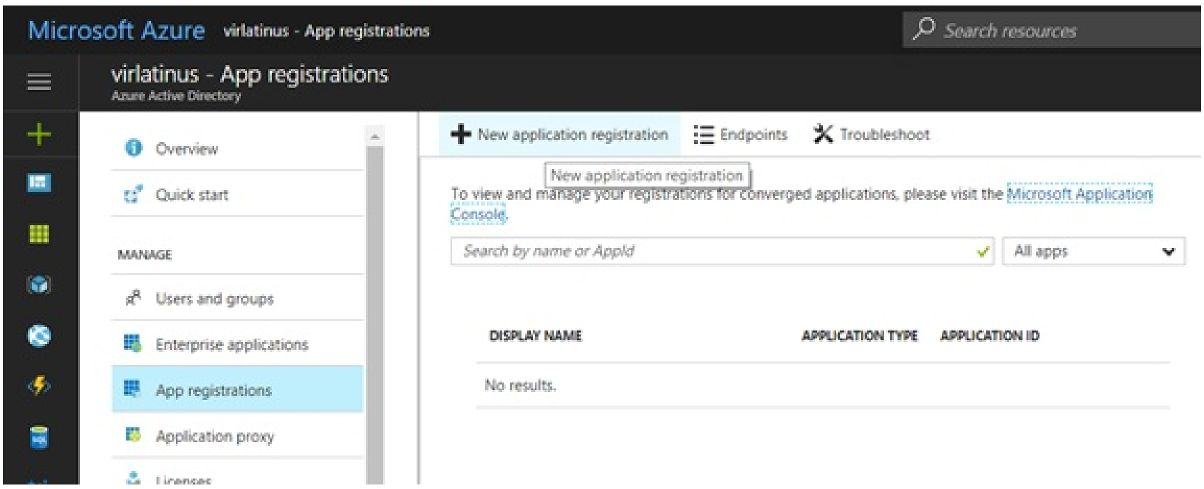
1. Go to the Azure Portal
2. Log in with your onmicrosoft.com account



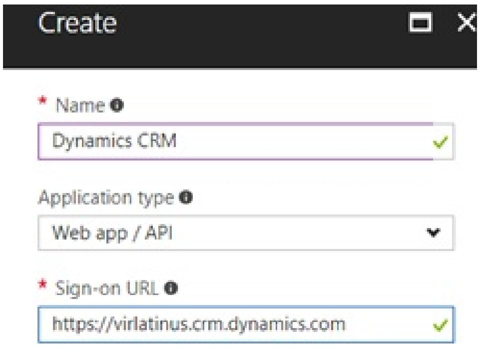
1. Go to Azure Active Directory



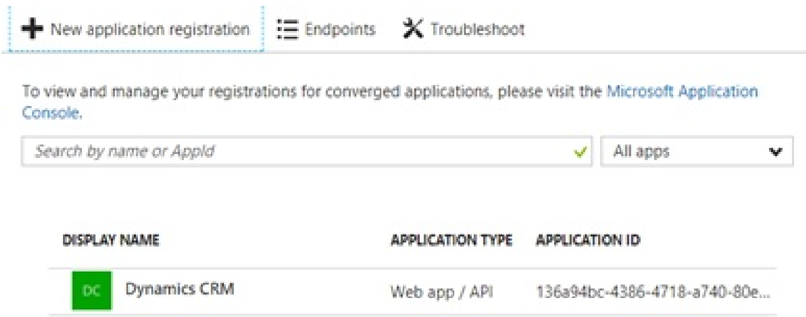
1. Add a new Application Registration



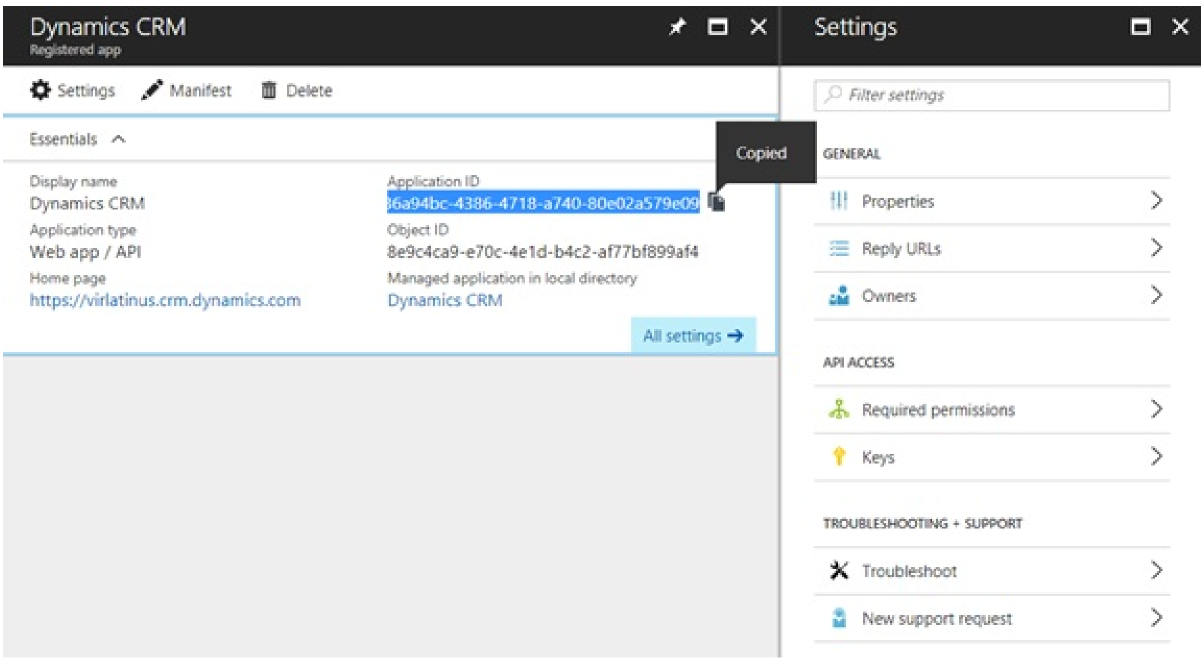
1. Fill in the CRM Application information



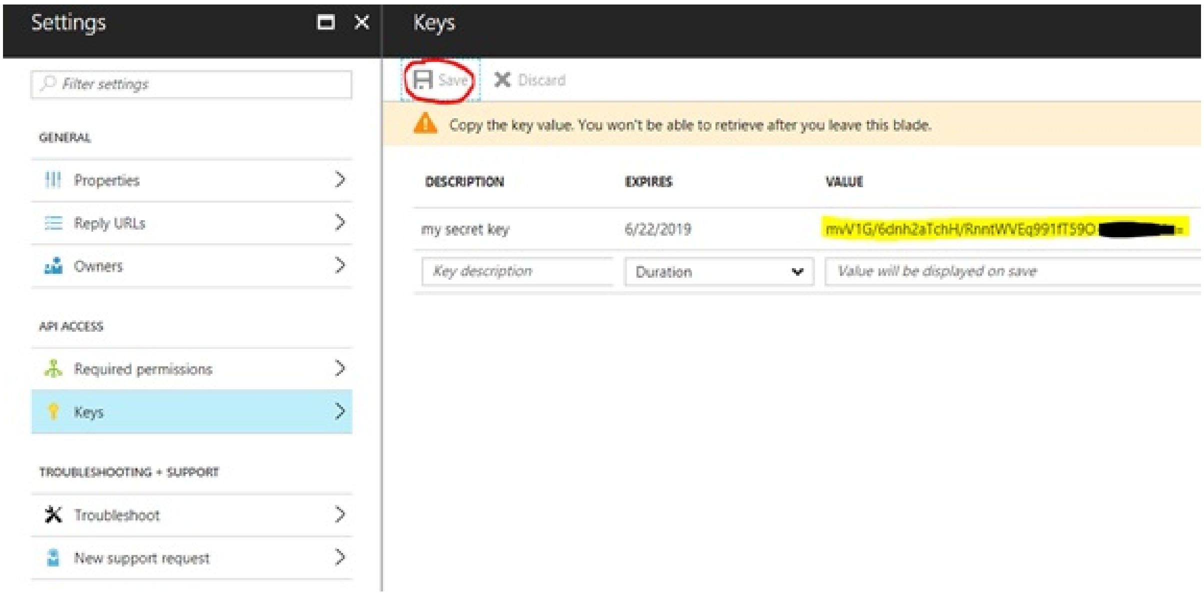
1. Click on Create
2. Click on the Application you just created

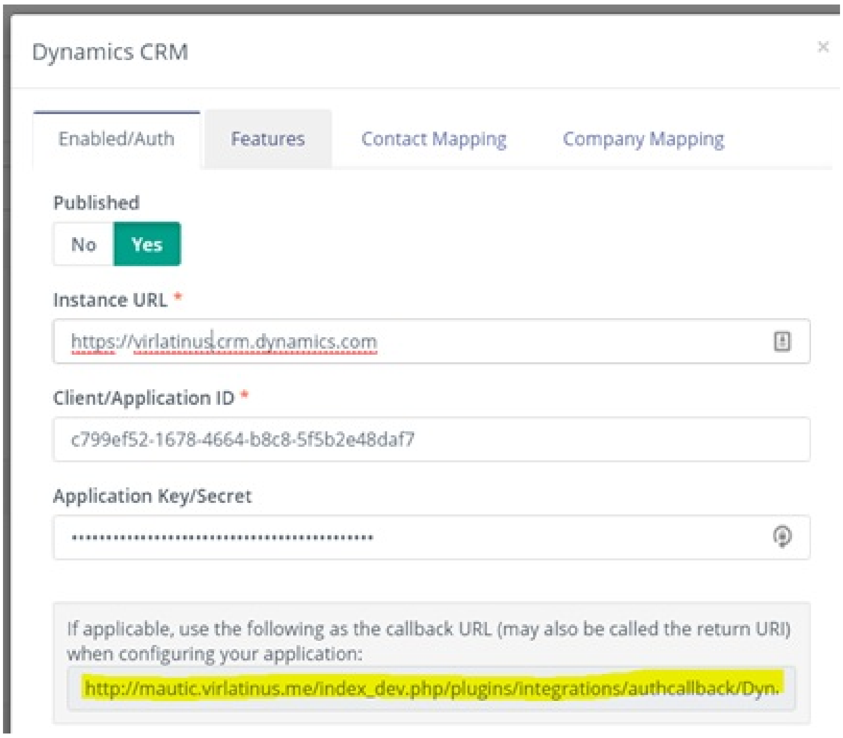


1. You will use the Application ID when configuring the plugin in Mautic

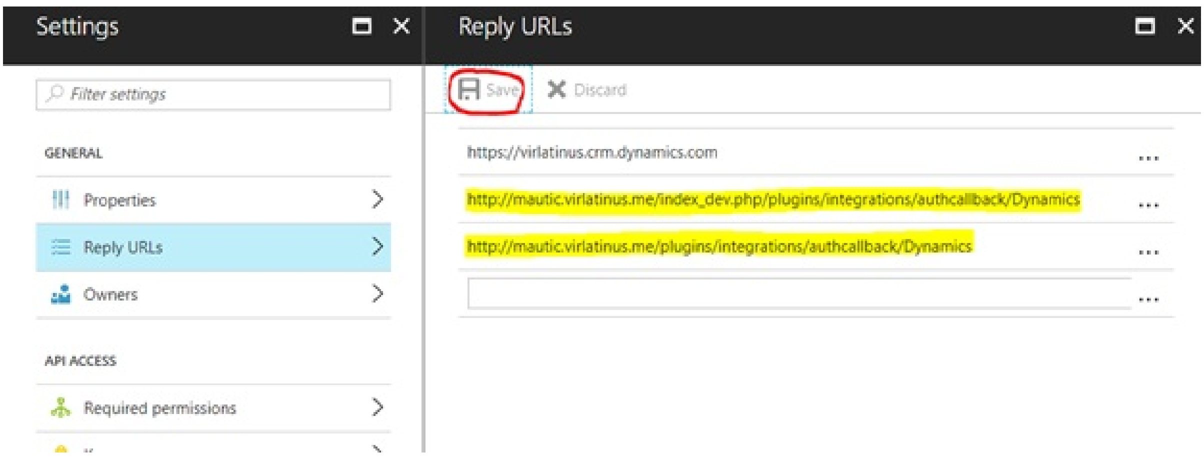


1. Add a new Key. Use any name, click on save and copy the value. You will use it as the plugin secret in Mautic.

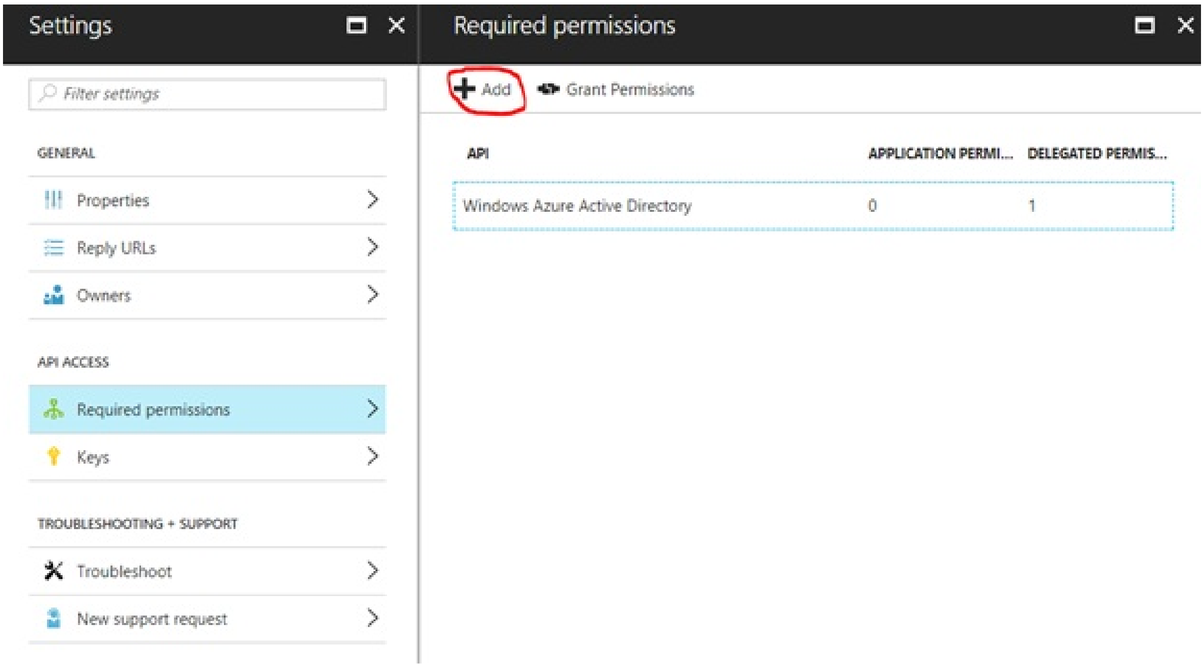




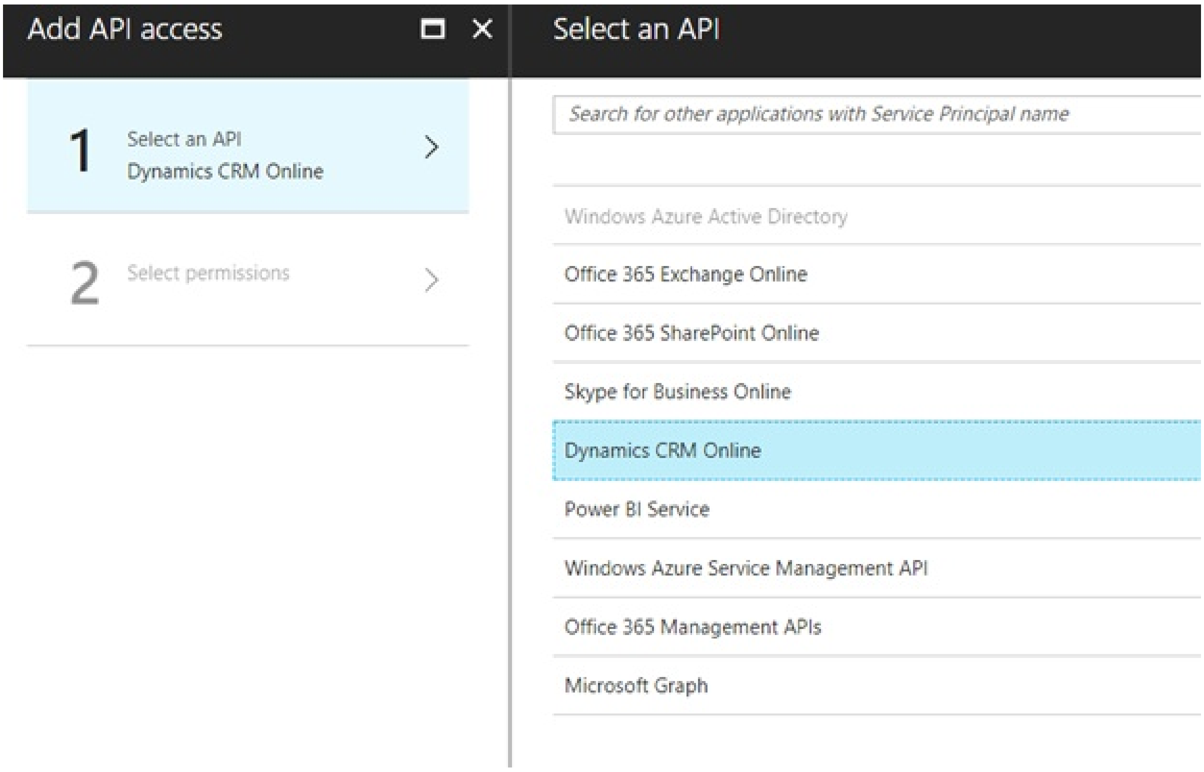
1. Configure the reply URLs using the callbacks from the plugin settings in Mautic. Click Save



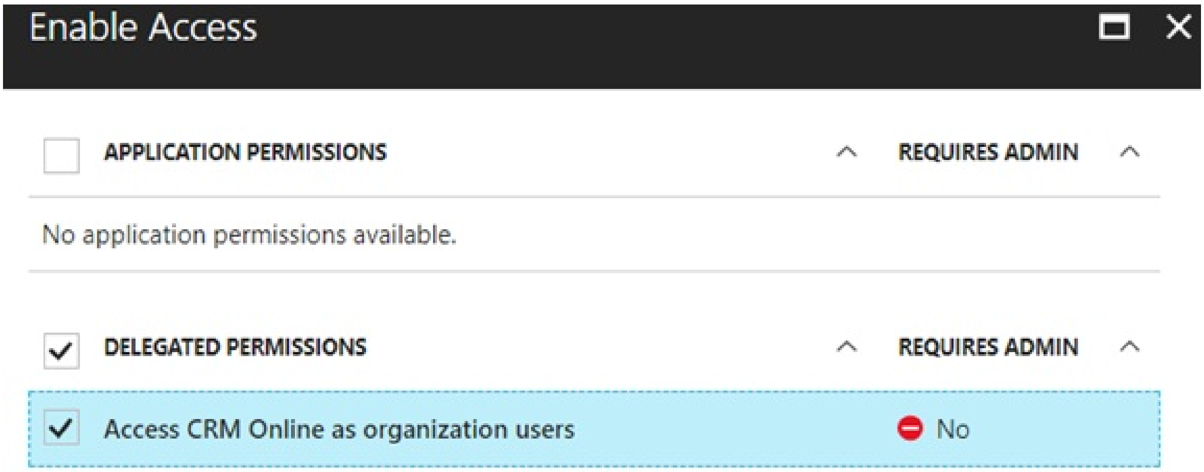
1. Configure the Required Permissions. Click on Add



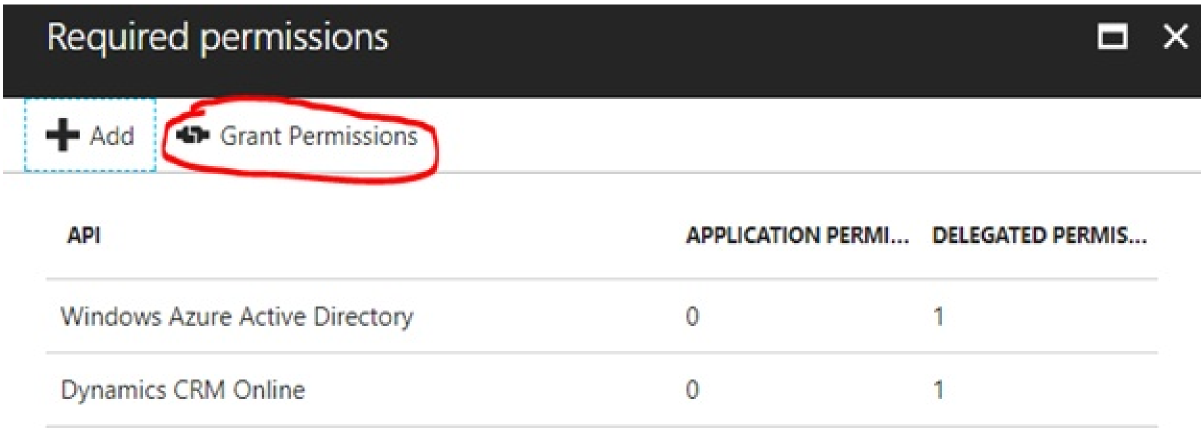
1. Add Dynamics CRM Online Api Access. Click Select



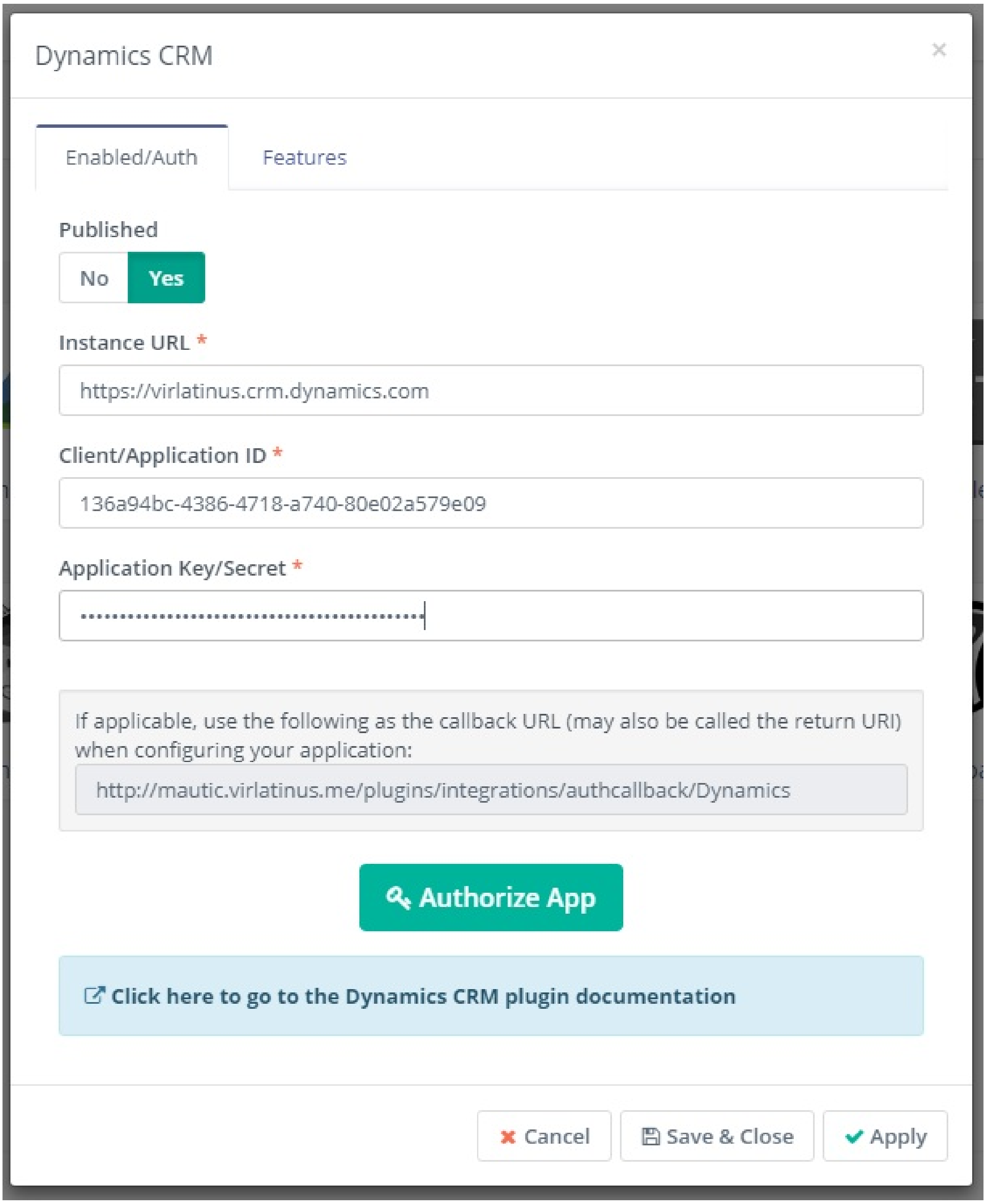
1. Enable Dynamics CRM access for the users. Click Select and then click Done



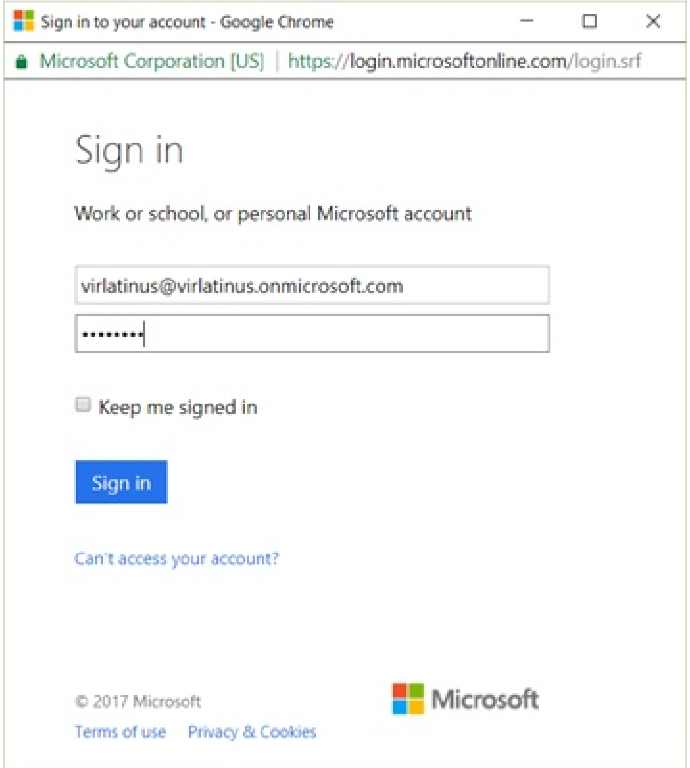
1. Activate the permissions by clicking "Grant Permissions". Click Yes



1. Go back to Mautic
2. Authorize the plugin



1. Use your onmicrosoft.com account to authenticate:



1. The plugin is ready. You can test using "Push to Integration" form and campaign actions.
2. You can also test by executing the command: `php app/console mautic:integration:fetchleads -i Dynamics`

Mautic - Social Login

Social login in Mautic is used to sign forms and pre-fill them with matched content, and also to update/create a contact in mautic with the information gathered from the social profile once the user has been signed in.

Requirements

For social login buttons to be available you need to enable your social media buttons listed and authorized.

Please follow the links provided to create your social applications before you authorize and configure your plugins.

- Twitter For twitter please see the twitter docs
- Facebook
- g+
- LinkedIn

Authorize the plugin

An application has to be created for authorization. While creating your social app, you might be asked for a *Callback URL*. This callback URL is the one provided in the configuration window for your plugin.

Once your app is created, copy the *API Key* to the *Client Key* field in Mautic's plugin configuration and *API Secret* to *Client Secret* field. Click the *Authorize* button.

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

Configure the plugin

If your plugin is authorized correctly, you can configure the *Features* and *Contact Field Mapping* tab in the plugin configuration. Each plugin's feature tabs have different features depending on the integrations done with Mautic. For most of them you will have a "Social login" button. Enable this feature to use the social login in forms.

Next, you need to map your contact fields. Please be aware that the social login button will not only try to pre-fill the form with matched content, but it will also update/create a contact based on the social profile fields matched in this section.

Note: If no fields are matched, the social login will not be able to identify or create any contacts.

Social login in forms

The social login buttons are used in forms. To be able to use them please make sure you have followed all steps mentioned above. Then you will need to follow these steps:

1. Create a form.
2. Choose the social login field. Buttons for all plugins enabled will appear. Buttons for plugins that have not been authorized yet will not work properly.
3. To pre-fill the form: The social login tries to match fields that have the same or similar names to the fields found on the social profile.

Twitter 'profileHandle','name', 'location', 'description', 'url', 'time_zone', 'lang', 'email'

Facebook: 'first_name','last_name','name','gender','locale','email','link',

g+ 'profileHandle'

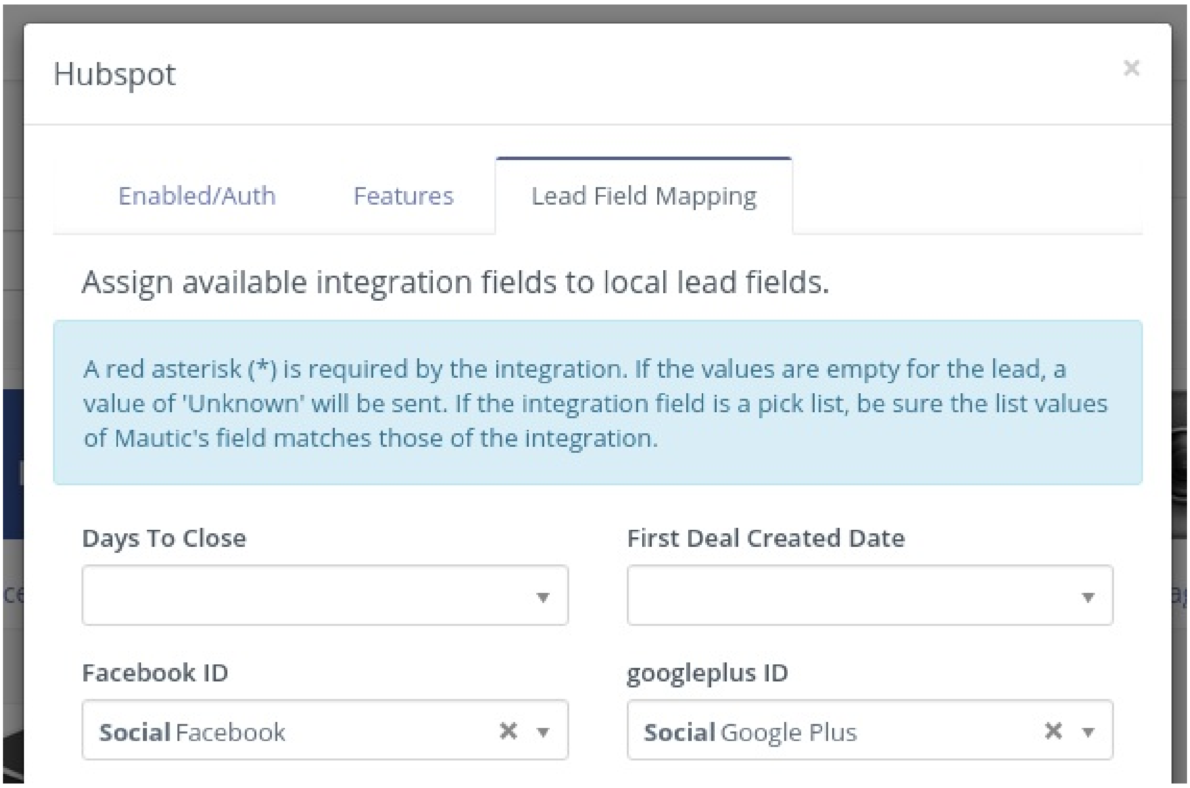
'nickname','occupation','skills','birthday','gender','urls','displayName','name','emails','tagline','braggingRights','aboutMe' 'currentLocation','relationshipStatus','organizations','placesLived','language','ageRange'

Linkedin

'firstName','lastName','maidenName','formattedName','headline','location','summary','specialties','positions','publicProfileUrl','emailAddress'

Field Mapping in a plugin integration

At the *Contact Field Mapping* tab is the list of available fields from an integration. You have to select the Mautic Contact Field equivalent so each field will get the right value. You don't have to map every field. Map only those you want to push into the integration.

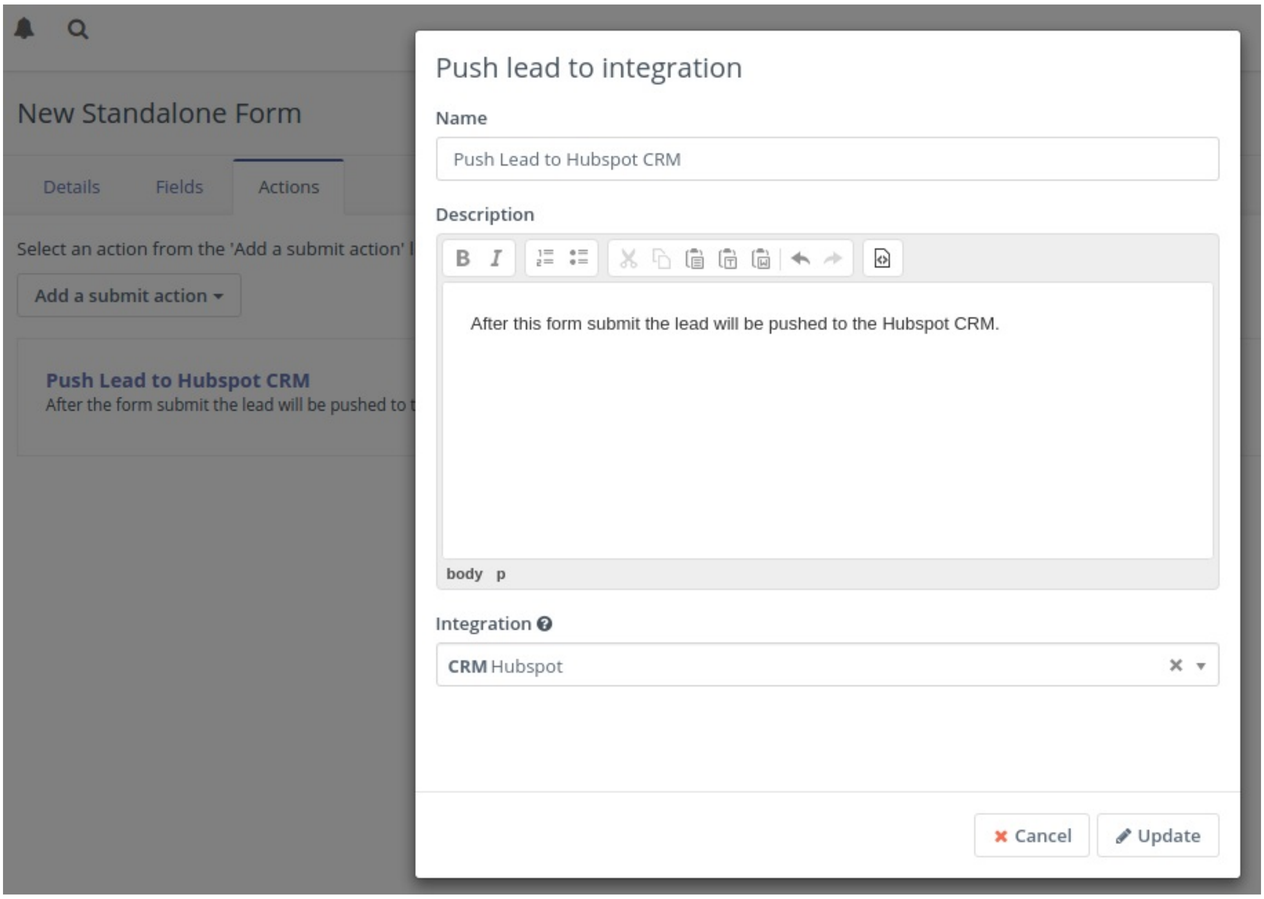


How to test an integration

If you want to test an integration plugin to ensure that it is configured properly, you have 3 options how to do that. A contact can be pushed to integration via these places:

- The Campaign Builder has the *Push contact to integration* action which can be used in the Campaign dripflow.
- The Standalone Form has the *Push contact to integration* action which can be used after a standalone form is submitted.
- The Point Trigger has the *Push contact to integration* action which can be triggered when a contact achieves some point limit.

Use any of those triggers to test the plugin and see if the contact appears in the integration. Here is how the Standalone Form action can be configured:



After you have your form with some fields (for example an email and a first name field) and the Push to an integration (e.g. Hubspot CRM) action, go to the form public URL at http://[yourmautic]/form/[formID], fill in some sample contact information and submit it. Then check the integration to see if the new contact has been created.

Troubleshooting

If the first name value hasn't been transferred, make sure you mapped the form field value to the contact field value in the form field configuration.

Use Cases

There are many compelling and exciting ways to implement marketing automation. Some of these use cases are more easily understood and regularly implemented while others are more unique.

Use Case Purposes

In an effort to outline the power of marketing automation and encourage industries in a variety of different vertical markets to take advantage of this software these use cases have been defined and outlined in greater detail.

Contribute Additional Use Cases

As with all other aspects of this documentation, pull requests, updates, and modifications are welcomed. Should you know of additional use cases where marketing automation can be implemented please contribute that information so the documentation can be improved for all.

Sales & Marketing

The first and most widely recognized example of marketing automation is in the sales and marketing industry. This was the original intended use for a tool such as marketing automation and as such most major organizations are familiar with the concept of marketing automation as it relates to their sales cycle.

Below is an example of a typical use case within a sales based field.

Terminology

When working in a sales environment the common terms used are as follows:

Assets - Typically these are white papers, other informational materials, sample product downloads and other resources.

Campaigns - A set of email and social media activities related to a specific purpose sent on a timeframe or as a result of contact responses.

Decision Tree - A process implemented within a campaign which determines the next step based on a contact's response or decision.

Dripflow - A campaign style which sends predefined messages on a specific timeframe typically over a prolonged period of time.

Emails - These are specific points of contact with contacts. Emails are sent to segments as part of campaigns.

Forms - A form placed online to collect additional contact information. Forms are frequently used in conjunction with pages.

Contacts - Potential customers

Segments - A group of associated contacts based on specific, defined criteria

Pages - Landing pages designed to funnel contacts to a specific call to action.

Points - These are the numeric values assigned to any number of activities by which the contact is scored to determine interest levels.

Reports - Reports are overviews and data aggregations of contacts, pages, assets, and other parts of the marketing automation tool to assist in improving efficiency.

Workflow

Once the terminology has been defined the next important step is creating an ideal workflow. Workflows are perhaps the most unique portion of any use case and as such even among sales organizations these will have vastly different implementations. Below is a somewhat standard sales workflow.

1. Define Contact Fields

The first step to take in a successful workflow is to correctly identify the fields and information you wish to collect on your contacts. Mautic allows you to create as many unique fields as you need to correctly organize and manage your potential customers.

2. Create Segments

The next step involves creating the segments. As mentioned above these segments are groupings of contacts based on specific characteristics. The purpose of creating these segments is to allow Mautic to automatically add contacts to these segments when certain actions are taken. Contacts can be manually added to segments as well when necessary.

3. Add Assets

Adding assets to your Mautic platform will allow you to use those assets as part of forms, pages, and campaigns. These assets can be anything you choose, as mentioned above typically they are PDFs, Slideshows, and other informational materials.

4. Create Form

Once you've added an asset you can now use that asset as the result of a form submission. Creating a form is the critical stage of your marketing automation platform. Forms allow you to convert visitors into named, potential customers.

5. Setup Landing Pages

Creating a landing page allows you to setup a specific sales funnel you want the contact to follow. Most often landing pages are created with a single call to action. These call to actions usually consist of a form submission where the contact provides more information in exchange for something. Landing pages can be themed to specific layouts or be uniquely created during the setup process.

6. Create Emails

Defining emails is another important part of the process. This is a direct method of interaction with the contacts. Emails can be created and included as part of the campaign process. Remember that emails are sent to segments and can be setup to be sent automatically throughout the life of a campaign.

7. Create a Campaign

Campaigns are where you bring all the many items you've created together in a marketing effort. Typically campaigns are formed around a particular goalset such as a product launch, new customer outreach or other contact interaction. Campaigns implement decision trees which continue to nurture the contact based on their interactions and responses to emails and other points of contact.

8. Define Point Triggers and Actions

Points are what determine when a contact has fully matured and is considered a qualified contact to be automatically entered into the CRM in one scenario. You define these point triggers to be fired at specific values and result in the associated action to be performed. Simply put points automatically accumulate and serve to indicate which contacts have been nurtured through the sales cycle. One such action can be the automatic transition of the contact to the CRM system as mentioned.

Education

Secondary or higher education schools have tremendous opportunity to implement successful marketing automation for a variety of purposes. One significant use within these universities centers around the matriculation process of students.

Overview

University implementations of marketing automation for the purpose of nurturing students through the typical process. This process begins with the casual site visitor and continues through nurturing these visitors until they are better classified as prospective students. Once a prospective student has performed necessary steps (e.g. a campus visit) they are carried through the matriculation process.

Extended Use Case

While in some cases this may be the conclusion of the marketing automation workflow there are use cases for additional stages beyond where Mautic can provide additional benefit in tracking, monitoring, and improving student experiences throughout the active student's enrollment and beyond graduation as a former student, alumni.

Unique Terminology

Visitor - An anonymous contact. This would be a casual visitor.

Student - A contact. This is the prospective, current, or graduated student.

Workflow

The workflow for an educational environment is for the most part similar to a typical workflow. However there are a few key differences. First, contacts are considered students. Students would continue through the workflow in a similar manner as a contact. As with the terminology these are the details.

1. Define Fields

Students have unique attributes which are helpful for universities to track. The first step of configuring marketing automation for your needs will be to create those fields for the student profile.

2. Create Segments

Student segments are convenient ways to organize students. Whether you choose to organize your students by geographic region, course of study, degree program, or a variety of other options the student segments are a way to keep things grouped and allow for easy targeted interactions.

3. Add Assets

Universities have a variety of resources you may want to offer to your prospective students. Those assets can be course-specific materials, grant applications, or any one of many other resources.

...

As mentioned skipped steps follow the same logic as in the Sales Use Case

...

8. Point Triggers & Actions

Visitors and potential students earn points for any number of activities performed on the website or other online locations. You can add manual points to a potential student based on offline activities (e.g. a campus visit).

Conclusion

The bottom line is clear. Mautic works incredibly well as a marketing automation platform used in education environments. Tracking potential students, current students and even maintaining segments for graduates to keep track of alumni and send follow-up email messages can all be done with Mautic.

Community

Using marketing automation in a community environment is somewhat different than what you would find in a typical sales setting. However the benefits of marketing automation can be applied to a community and serve as a valuable resource in community management.

As with the other sections the first thing to do is explore terminology. Many of the key terms will remain the same.

Terminology

Contact - a community member

Campaign - These would be considered engagements.

Workflow

When looking at using marketing automation within the community instead of focusing on funneling contacts to a particular outcome (for example sales) the workflow would consist more of managing the community. Managing a community involves determining the most involved community members, recognizing their efforts, and publicly praising them for the work that they are doing.

It's important to keep in mind when monitoring a community that the most active volunteers are not necessarily the most vocal. Using marketing automation will allow you to find those community members contributing in other ways besides merely vocal participation.

In a community setting the purpose of marketing automation as previously defined involves locating and wording your volunteers. With this goal in mind you can use Mautic to help you identify those volunteers. This can be done by using the many integrations found within Mautic and applying points to each volunteer.

In this scenario, points are being used to calculate community involvement. These points can be applied for any number of actions or activities taken by your volunteers. Examples of these activities would include things such as forum posts, chat messages, newsletter list messages, or any other metric you choose. Adding points to users weighted by specific use cases and unique to your community will allow you to quickly locate your most active participants.

Political

Cron Jobs

Mautic requires a few cron jobs to handle some maintenance tasks. Most web hosts provide a means to add cron jobs either through SSH, cPanel, or another custom panel. Please consult your host's documentation/support if you are unsure on how to setup cron jobs.

How frequently you run the cron jobs is up to you. Many shared hosts prefer that you run scripts every 15 or 30 minutes and may even override the scheduled times to meet these restrictions. Consult your host's documentation if they have such a restriction.

It is HIGHLY recommended that you stagger the following required jobs so as to not run the exact same minute.

For instance:

- 0,15,30,45 <— mautic:segments:update
- 5,20,35,50 <— mautic:campaigns:update
- 10,25,40,55 <— mautic:campaigns:trigger

Required

Segments

To keep the segments current:

```
php /path/to/mautic/app/console mautic:segments:update
```

By default, the script will process contacts in batches of 300. If this is too many for your server's resources, use the option `--batch-limit=X` replacing X with the a 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

To keep campaigns updated with applicable contacts:

```
php /path/to/mautic/app/console mautic:campaigns:rebuild
```

By default, the script will process contacts in batches of 300. If this is too many for your server's resources, use the option `--batch-limit=X` replacing X with the a 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.

To execute campaigns events:

```
php /path/to/mautic/app/console mautic:campaigns:trigger
```

By default, the script will process events in batches of 100. If this is too many for your server's resources, use the option `--batch-limit=X` replacing X with the a 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.

To send frequency rules rescheduled marketing campaign 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 job should be added to your list of jobs:

`mautic:messages:send`

NOTE that these messages will only be added to the queue if frequency rules are applied either systemwide or per contact.

Optional

Process Email Queue

If the system is configured to queue emails to the filesystem, a cron job is required to process them.

```
php /path/to/mautic/app/console mautic:emails:send
```

Fetch and Process Monitored Email

If using the Bounce Management,

```
php /path/to/mautic/app/console mautic:email:fetch
```

Social Monitoring

If using the Social Monitoring,

```
php /path/to/mautic/app/console mautic:social:monitoring
```

Webhooks

If Mautic is configured to send webhooks in batches, use the following command to send the payloads:

```
php /path/to/mautic/app/console mautic:webhooks:process
```

Update MaxMind GeoLite2 IP Database

Mautic uses MaxMind's GeoLite2 IP database by default. The database is licensed under the Creative Commons Attribution-ShareAlike 3.0 Unported License and thus cannot be packaged with Mautic. The database can be downloaded manually through Mautic's Configuration or the following script can be used as a cron job to automatically download updates. (MaxMind updates their database the first Tuesday of the month).

```
php /path/to/mautic/app/console mautic:iplookup:download
```

Cleanup Old Data

Cleanup a Mautic installation by purging old data. Note that not all data is able to be purged. Currently supported are audit log entries, visitors (anonymous contacts), and visitor page hits. Use `--dry-run` to view the number of records to be purged before making any changes.

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

```
php /path/to/mautic/app/console mautic:maintenance:cleanup --days-old=365 --dry-run
```

Send Scheduled Broadcasts (e.g. segment emails)

Starting with Mautic 2.2.0, it is now possible to use cron to send scheduled broadcasts for channel communications. The current only implementation of this is for segment emails. Instead of requiring a manual send and wait with the browser window open while ajax batches over the send - a command can now be used. The caveat for this is that the emails must be published and must have a published up date - this is to help prevent any unintentional email broadcasts. Just as it was with the manual/ajax process - only contacts who have not already received the specific communication will have it sent to them.

```
php /path/to/mautic/app/console mautic:broadcasts:send [--id=ID] [--channel=CHANNEL]
```

Note

For releases prior to 1.1.3, it is required to append `--env=prod` to the cron job command to ensure commands execute correctly.

Tips & Troubleshooting

If your environment provides a command-line specific build of php, often called `php-cli`, you may want to use that instead of `php` as it will have a cleaner output. On BlueHost and probably some other PHP hosts, the `php` command might be setup to discard the command-line parameters to `console`, in which case you must use `php-cli` to make the cron jobs work.

To assist in troubleshooting cron issues, you can pipe the output of each cron job to a specific file by adding something like `>/path/to/somefile.log 2>&1` at the end of the cron job. Then you can look at the contents of the file to see what was printed. If an error is occurring when running run the cron job, you will see it there, otherwise the file will be empty or have some stats. The modification time of the file informs you of the last time the cron job ran. You can thus use this to figure out whether or not the cron job is running successfully and on schedule. In addition it is recommended to enable the non-interactive mode together with the no-ansi mode when you run your commands using cron. This way you ensure, that you have proper timestamps in your log and the output is more readable.

Example output

```
$ php app/console mautic:segments:update --no-interaction --no-ansi
[2016-09-08 06:13:57] Rebuilding contacts for segment 1
[2016-09-08 06:13:57] 0 total contact(s) to be added in batches of 300
[2016-09-08 06:13:57] 0 total contact(s) to be removed in batches of 300
```

```
[2016-09-08 06:13:57] 0 contact(s) affected
```

If you have SSH access, try to run the command directly to see if any errors are generated. If there is nothing printed from either in a SSH session or in the cron output from above, check the server's logs. If you see similar errors to `'Warning: Invalid argument supplied for foreach()' in /vendor/symfony/console/Symfony/Component/Console/Input/ArgvInput.php:287`, you either need to use `php-cli` instead of `php` or try using `php -d register_argc_argv=On`. `

SAML Single Sign On

SAML is a single sign on protocol that allows single sign on and user creation in Mautic using a 3rd party user source called an identity provider (IDP).

Enabling SAML

To enable SAML support in Mautic, you first need the IDP's metadata xml. This will be provided to you by the IDP. If it is a URL, browse to the URL then save the content into an xml file.

Go to Configuration -> User/Authentication Settings. Then upload this file as the `Identity provider metadata file`.

It is recommended that a non-admin role be created to use as the default role for created users. Select this role in the `Default role for created users` dropdown.

Configuring the IDP

The IDP may ask for the following settings:

1) `Entity ID` - this will be site URL and is displayed at the top of User/Authentication Settings. Copy this exactly as is to the IDP.

2) `Service provider metadata` - if a URL is requested, use `https://your-mautic.com/saml/metadata.xml`. If a file, then browse to that URL and save the content as an XML file.

3) `Assertion consumer service` - Use `https://your-mautic.com/s/saml/login_check`

4) `Issuer` - this should be provided by the IDP but is often configurable. If it is a URL, be sure that the scheme (http:// and https://) are not part of it.

5) `Verify request signatures` or a SSL certificate - If the IDP supports encrypting and validating request signatures from Mautic to the IDP, generate a self signed SSL certificate. Upload the certificate and private key through Mautic's Configuration -> User/Authentication Settings under the `Use a custom X.509 certificate and private key to secure communication between Mautic and the IDP.` section. Then upload the certificate to the IDP.

6) `Custom attributes` - Mautic requires 3 custom attributes that must be included in the IDP responses for the user email, first name and last name. Username is also supported but is optional. Configure the attribute names used by the IDP in Mautic's Configuration -> User/Authentication Settings under the `Enter the names of the attributes the configured IDP uses for the following Mautic user fields.` section.

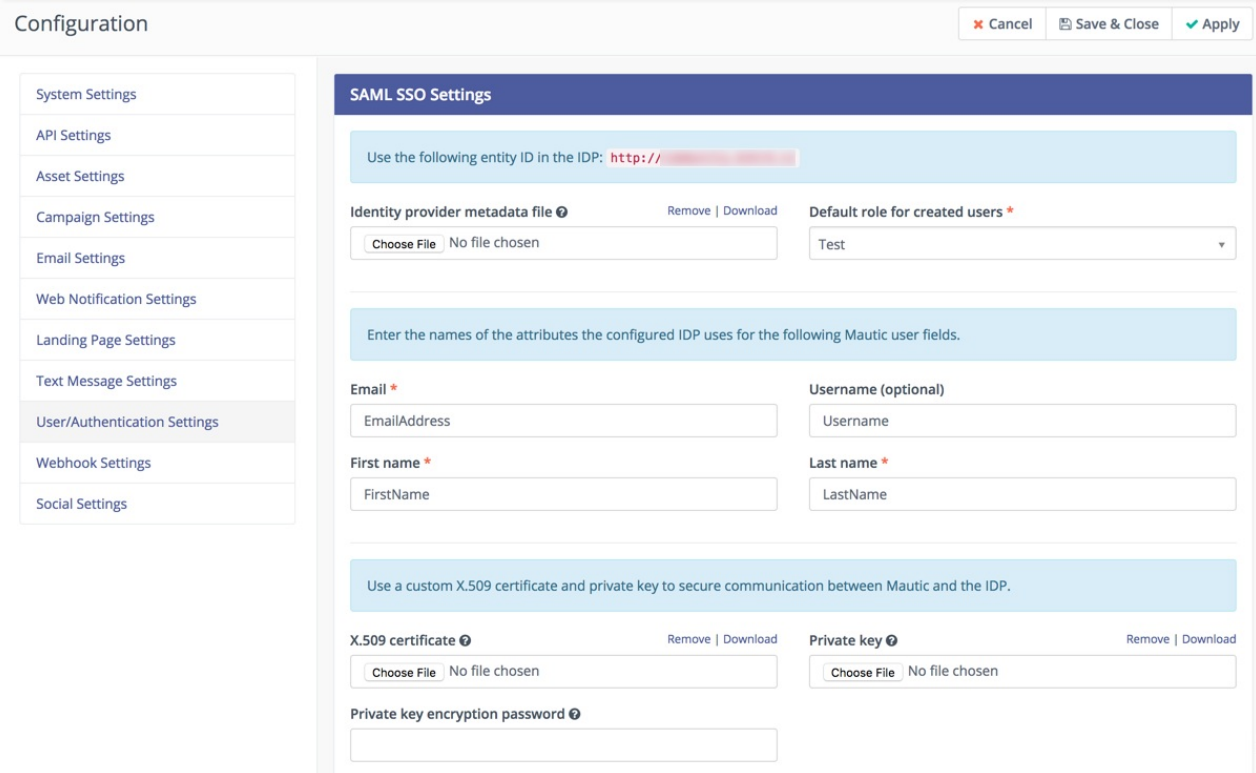
Logging In

Once Mautic is configured with the IDP and the IDP with Mautic, Mautic will by default redirect logins to the IDP's login page. `/s/login` is still available for direct logins but will need to be browsed to directly.

Login to the IDP where you'll be redirected back to Mautic. If the exchange is successful, the user will be created, if it does not already exist, and logged in.

Disable SAML

To disable SAML, simply click the `Remove` link to the right of the `Identity provider metadata file` label.



Themes

Themes control the look and feel of the Mautic landing pages, emails, forms and message screens. A basic Mautic installation will come pre-packaged with a number of themes which can be used 'as-is' or adapted to suit specific projects. It is also possible to create a theme for Mautic from scratch.

Manage themes

Theme Manager

Since Mautic 2.1.0, the Theme Manager was added and you can access it via the Admin Menu (click the cog icon in the top right corner to open it), select the Theme menu item.

The table of installed themes shows you the name of the theme, the author name and the link to his website if provided and what features the theme provides. There is also preview (if provided) to see the screenshot of the theme under the arrow next to the theme name.

Install new theme

A new theme can be installed as a zip package. The zip package must have the same structure as the themes preinstalled at Mautic. Than means there must be the config.json file present in the root folder of the zip package. More on that can be found in the developer documentation.

If you have the theme zip package either created by yourself or downloaded from a theme provider, in the top right corner of the Themes page is the upload form. Click the "Choose File" button to choose the zip file, then click Install. The notice will appear if the installation was successful and if so, the new theme appears in the table of currently installed themes.

Download an existing theme

If you want to create your own theme, the simplest way to do that is to download an existing theme and modify it. The download option is in the drop down menu next to every theme in the Theme Manager table.

Update an old theme

The old theme files will be overwritten by the new one when installing a theme which already exists in your Mautic. Therefore, the theme updates can be also done by the Theme Manager's Install form.

The pre-installed themes cannot be overwritten because the changes would return again after a Mautic update.

Delete a theme

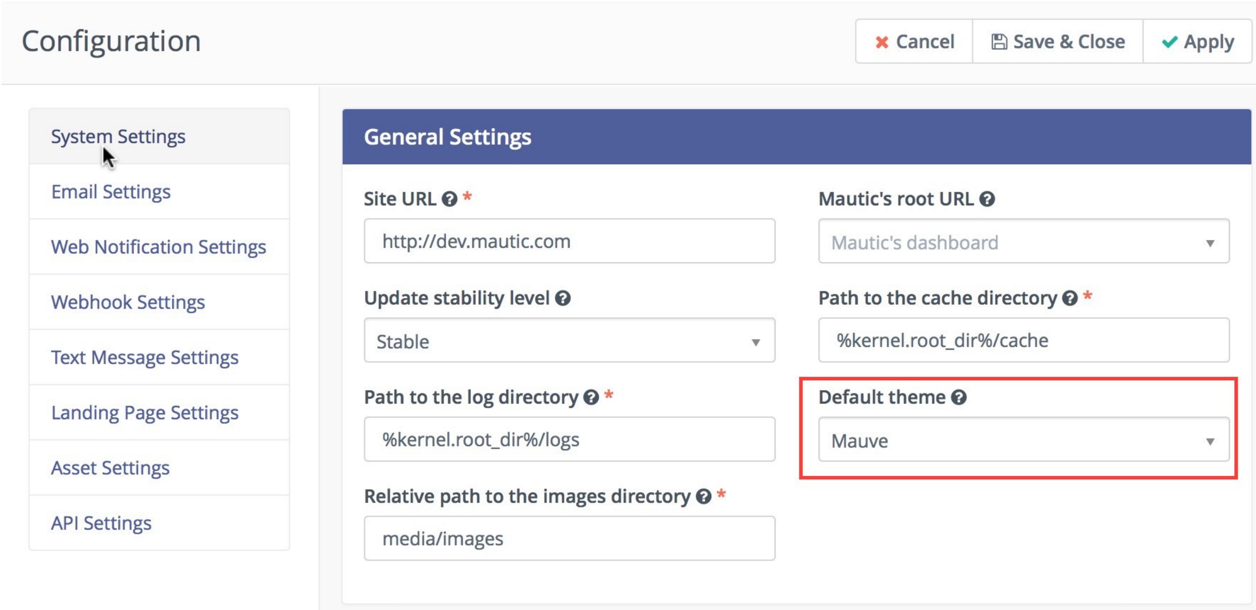
Go to the Theme Manager, check what theme(s) you want to delete and then click the red button above the theme table to delete them.

The pre-installed themes cannot be deleted because they would appear again after a Mautic update.

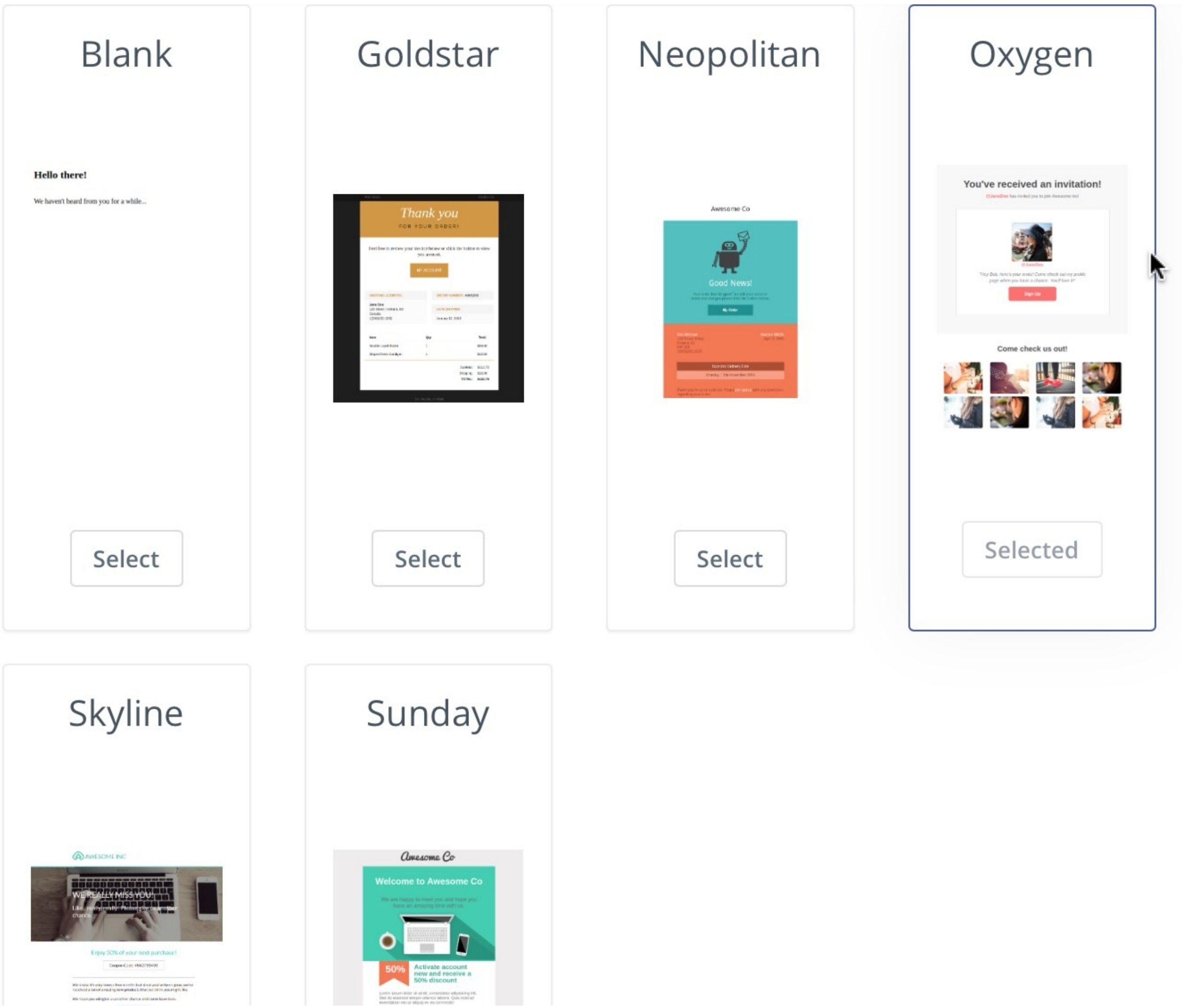
Assigning a default theme

It is possible to assign a default theme to a Mautic instance by editing the global configuration. To access the global configuration you must be logged in with sufficient access. Click on the cog icon beside the logged in user, and select 'Configuration'.

From the configuration screen, the available themes will be listed in a dropdown box, which can be selected. On saving, this setting will apply for all resources which do not have a theme explicitly specified.



Themes are available for emails and landing pages on each one's main editing page



Customizing themes

It is possible to customize themes, or even to create your own from scratch, with Mautic. To do this go to the Theme Manager, open the drop down menu next to the pre-installed theme you want to modify and download it.

Customizing an existing theme

To customize the downloaded theme, unzip the files to an empty folder. Name the folder as the new name of your theme. Then edit the following files to amend the theme paths and name:

- theme.css - rename to match your theme name
- config.php - amend theme name
- base.html.php - amend file path for CSS import to use new folder and CSS filename; amend the default page title from 'Mautic'

Mautic themes are written in HTML and TWIG, to make amendments to the structure or layout simply edit the files in the new theme and upload them to your instance. Ensure that your hosting provider does not have caching enabled, as this can sometimes prevent changes to CSS files being replicated instantly.

Theme structure

Visit the Developer documentation about themes for details about the theme structure.

Code Mode

Code Mode is an option available in the Email and Page edit form. It will allow you to create/insert/edit your content in HTML code. It's helpful for situations where you don't want to use a Mautic theme and you want to use an HTML theme copied from a 3rd party theme builder or if you enjoy editing HTML code so much.

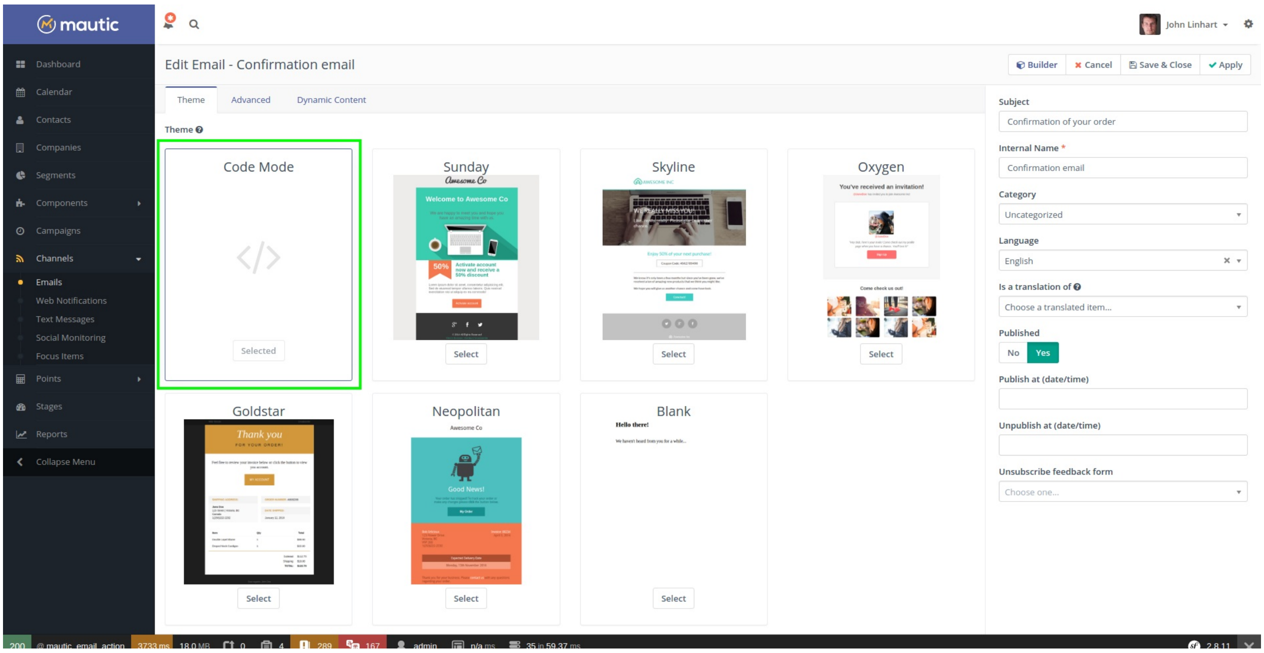
Code Mode was introduced in Mautic 2.3.0 and replaced the full page Froala (WYSIWYG) editor which manipulated the HTML code in some cases. Code Mode will not modify any of the code you paste in. The other option to edit a page/email content is to use the Builder. It uses Froala editor only to edit the text/image content, not the full page, so it won't modify the page layout.

Select the Code Mode

The Code Mode can be selected in the theme select after you create/edit the page/email. To open the Code Mode Builder after you select the Code Mode theme option, click the Builder button.

Limitations

If you use a Mautic theme to create the page/email and you want to edit the HTML code of it in the Code Mode Builder, you can do so, but you cannot switch back to the theme again. You will always have to edit the content in the Code Mode Builder. Selecting a theme will always refresh the content to the default theme HTML and so you'll lose your modifications.

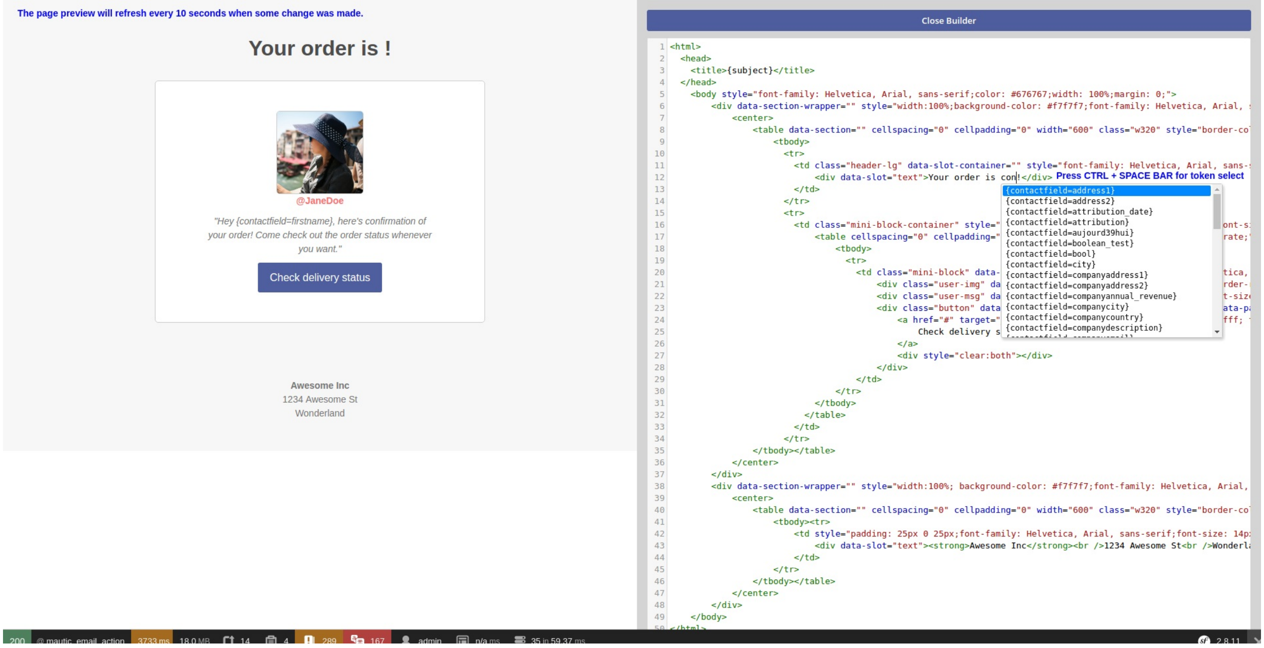


Edit the HTML content in the Code Mode Builder

When the Code Mode Builder is opened, you can see the preview on the left, the HTML code editor on the right. The preview will automatically refresh every 10 seconds if some change has been made to the code.

Mautic Tokens

You can use the tokens in the Code Mode Builder when you type them directly. For example when you type `{contactfield=firstname}` or you can select them from the dropdown. The dropdown will open when you press `CTRL` + `SPACE BAR`. You can type to search for the token you wish to insert.



Media Manager

There is a button at the top of code area where you can open the Media Manager to upload and/or select an image or other file. If you select a file, the URL of that file will be inserted to the current position of the cursor. Use this to create links and IMG tags.

Code Formatter

It might happen that your older emails or pages appear as HTML code on one line. Or if you insert an HTML code with odd formatting, use the Format Code button. It will automatically go through the code and format it so it is easier to navigate in it.

Translations

Mautic is used by a world-wide community and therefore it can be localized to any language. If you cannot find your language yet, take a look to the section about how to translate Mautic.

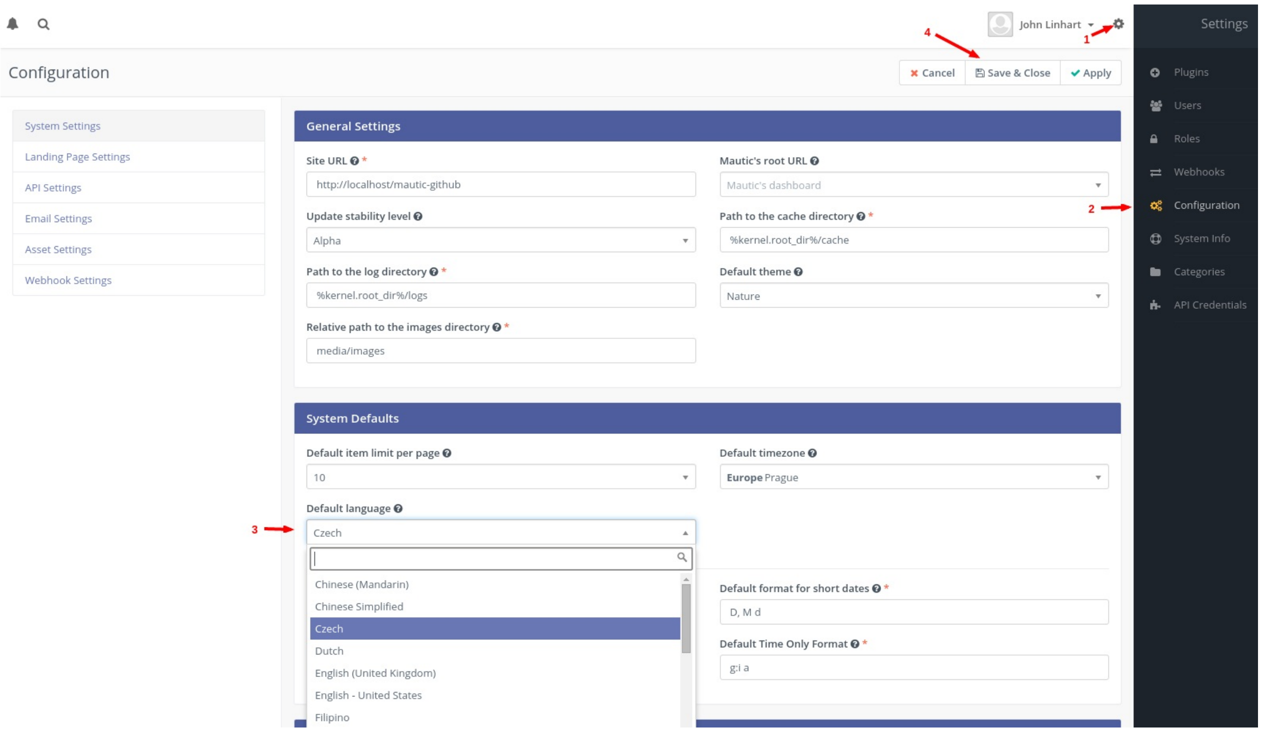
How to select a language in Mautic

Language can be selected in 2 places.

1. Default language

In the Mautic configuration the default language can be configured. It is pre-set to `English - United States` by default. Every user will see this language if she doesn't configure her language in her profile.

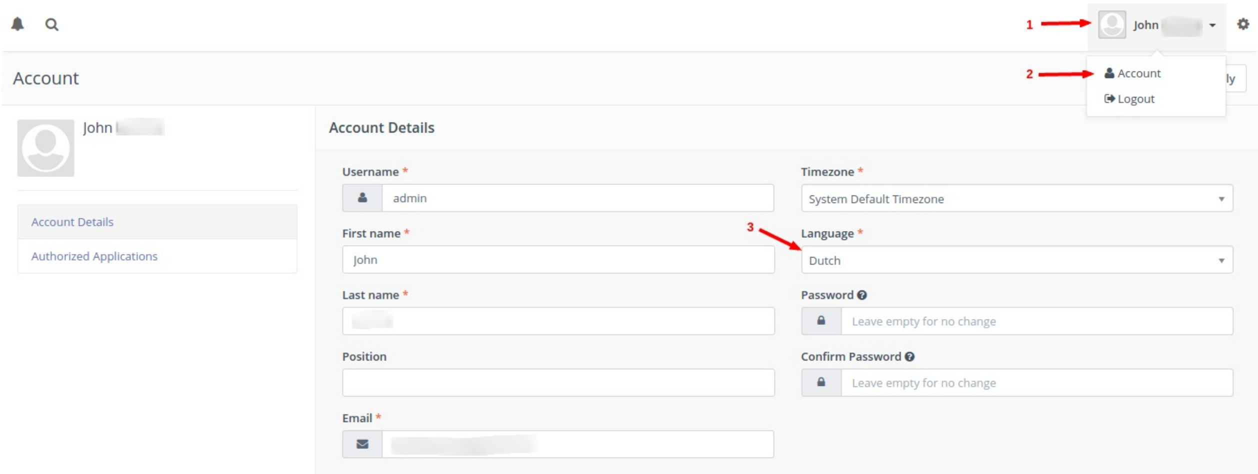
1. Open the right admin menu by clicking on the cog icon in the top right corner.
2. Select the *Configuration* menu item.
3. Select the default language.
4. Save the configuration.



2. User language

A user can define her own language and override the default language. This lets a multilangual team work on the same Mautic instance.

1. Open the user menu by clicking on the user name in the top right corner.
2. Click on *Account* menu item.
3. Select the user language.
4. Save the user profile.



How to translate Mautic

Mautic can be translated to any language. As Mautic is a community project, it can be translated by any community member to any language. Translations are made in the Transifex web app.

1. Create an account at Transifex if you don't have one already.
2. Take a look at the list of languages which were created for the project already.
3. Create a language if your language is missing or apply for an existing language.

Take a look at official Transifex Documentation if you have any questions about the translation process.

How to update a language

A language is downloaded automatically every time the configuration is saved and the language hasn't been downloaded already. The tricky part is that Mautic won't download a language if it has been already downloaded. So to update a language:

1. Open the Mautic file system via SFTP or SSH.
2. In the Mautic root folder you should see the folder called *translations*. Open it.
3. In the *translations* folder are the languages stored. Remove the folder of the language you want to update.
4. Go go Mautic configuration and save it with the language you've deleted.

The language should be downloaded again with the latest translations. The translations are generated from Transifex once a day.

If you have any questions about translations, join the community in the Slack #Translations channel.

General troubleshooting

Follow these steps to solve your issue as fast as possible.

My Mautic is acting weird

Even through the effort of the dev and test teams, it might happen. At first, let's try a few tricks which might fix it fast.

1. Clear the cache

There are several ways to do that. The easiest is to go to the `/app/cache` folder and delete its content. If you want to do it via CLI command, navigate to the Mautic root folder and run `rm -rf app/cache/*`. The new cache files will generate itself after the next Mautic refresh in the browser.

It might happen that the files won't generate itself. It can be caused by the wrong folder permission and Mautic doesn't have permission to write the new cache files. Contact your sysadmin and ask him to fix it for you.

Tip: Don't execute Mautic commands as the root user yourself and do not run Mautic commands in the root crontab. This way all the files which will be created by the command will have the root as the author and Mautic won't be able to rewrite those files.

2. Try to fix the database schema

Go to `http://[your-mautic-url]/s/update/schema`. It will update your database schema if there are some known updates to be applied.

Nope, it didn't help

Alright. Let's figure out what the issue really is.

Check the logs

Mautic logs

Please do not report the following two errors:

> The site is currently offline due to encountering an error. If the problem persists, please contact the system administrator

or

> Uh oh! I think I broke it.

Those are generic error messages which provide absolutely no valuable information about the cause of the error. It is on purpose. The detailed error message isn't displayed in the production environment because if it did, it could tell possible crackers some valuable information about your server, Mautic or integration which they could use to attack it. That's why this generic error message is shown instead and the real error message is logged into the logs. Long story short, that's why reporting it doesn't make any sense.

There are different logs in your system which could tell us more. Let's start from the Mautic log.

If your Mautic administration works, go to the Admin menu (click the **cog icon** in the top right side corner), then **System Info**, then **Log**. You will see the error messages recorded by Mautic today.

If your Mautic administration doesn't work, open the logs in via the file system. Go to `[mautic_root]/app/logs` folder. You should see one file for every day called `mautic_prod-YYYY-mm-dd.php`. Open the latest one.

Server logs

I don't have experience with all operating systems and servers. I can tell you that Apache2 saves the server logs at Ubuntu in `/var/log/apache2/error.log`. If you don't know where the server logs are stored, contact your sysadmin or try to google it.

MySql logs

If your Mautic says it is not able to connect to MySql for some reason, you can check what information is stored in the MySql log. Again, I can only advise where the log is in Ubuntu: `/var/log/mysql/error.log`. But to be honest, the database connection error is in 90% of cases caused by wrong credentials.

The log file is too big

If the log is so big that a normal editor cannot open it and you have the CLI access, try to read only the few last rows of it with command `tail [mautic_root]/app/logs/mautic_prod-YYYY-mm-dd.php`. You have to add the current date instead of the `YYYY-mm-dd` part. If you want to see more rows than the default is, use the `-n 40` attribute at the end of the command to see the last 40 rows.

But I don't understand the error message

Take a deep breath and try to read the error messages. Some error messages actually have the solution written in them. Look at this one:

```
Fatal: Automatically populating $HTTP_RAW_POST_DATA is deprecated and will be removed in a future version. To avoid this warning
```

You see the advice in it?

> To avoid this warning set 'always_populate_raw_post_data' to '-1' in php.ini

But you still don't know what it means? Simplest thing in this case is to contact your sysadmin and tell them just that.

Let's look at some examples

Errors:

```
PHP Fatal error:  Allowed memory size of 67108864 bytes exhausted (tried to allocate 10924085 bytes) in ...
```

```
Fatal: Maximum execution time of 120 seconds exceeded - in file ...
```

Solution: This means Mautic needs more memory / time than your server limit is. Again, contact your sysadmin and consult your possibilities.

Error:

```
Fatal: Class 'ZipArchive' not found
```

Solution: It can be ZipArchive, MCrypt or any other PHP module missing. Again, consult you know who to install it.

Error:

```
PHP Parse error:  syntax error, unexpected T_OBJECT_OPERATOR in
```

Solution: This usually means your PHP is outdated. Check what Mautic requirements are.

Error:

```
exception 'RuntimeException' with message 'Unable to create the cache directory ...
```

Solution: It means that the file permissions aren't right and Mautic cannot write the cache files.

Error:

```
mautic.WARNING: IP LOOKUP: The file "../app/cache/prod/../ip_data/GeoLite2-City.mmdb
```

Solution: It means that you just didn't download the IP lookup library. Go to Mautic's Configuration, scroll to the bottom and click the button to download it.

Error:

```
Uncaught PHP Exception Doctrine\DBAL\DBALException: "An exception occurred while executing 'INSERT INTO
```

Solution: This is a SQL error. It might either mean that your database schema is outdated or there is a bug in some part of Mautic. In the first case, the step 2 from this article should fix it. In the second case, look at the error reporting below.

Error:

```
PHP Fatal error: Call to a member function isRendered() on a non-object in ...
```

Solution: Usually means a bug.

How and where to report a bug

Help your fellow developers and report the bug correctly the first time. Go to GitHub issue tracker and answer at least the following 3 questions:

Mautic version: PHP version: Steps to reproduce the error:

And paste in the error message(s) obviously.