

BeetleEye Application

User Documentation

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Welcome to the BeetleEye Application

Overview

BeetleEye (BE) is a cloud-based platform that makes connecting with your customers easy, efficient, and intuitive. As a BE user, you can view and interact with your customers and potential customers. The BE platform automates data collection, via website forms or API calls, and also organizes that data into manageable lists and leads. Using the data collected by the BE platform, you can create email campaigns with which you connect with your customers. See the sections below for more details.

Navigation

Access BeetleEye

You can access BeetleEye at <https://app.beetle-eye.com/> when you subscribe for an account or receive an invitation by a current account owner.

Update account information

You can select a default source, update your account plan, and logout from the dropdown attached to your name in the top left-hand corner of the screen.

Default source

The default source is the source that automatically loads when you log in to the BeetleEye app. If you have multiple sources, select the source that you would like to manage automatically.

To update the default source:

1. Select your name in the top right-hand corner of the screen and select Settings.
2. Within the Default Source dropdown menu, select the source that you would like to have load automatically upon login.
3. Select the **Update** button.

You can select which widgets you would like to see or hide from the Settings dropdown.

Account plan

You have several plan options available to you, depending on your needs. Plans are paid monthly and can be updated immediately. For details on what each plan entails, contact your BeetleEye consultant.

To update your plan:

1. Select your username in the top right-hand corner of the screen and select Payment.
2. Select the plan that you would like to activate.
 - a. The *Recurring Billing* page opens
3. Enter the requested information to set up recurring monthly billing.
4. Select the **Make Payment** button.

Logout

To log out of the BeetleEye application:

1. Select your name in the top right-hand corner of the screen and select Logout.

Welcome to the BeetleEye Application

You are now logged out of the BeetleEye application.

Toolbar components

The following is a high-level description of each section of the BeetleEye application homepage and toolbar:

Hamburger menu – Expand or collapse the navigation bar by selecting the hamburger menu found to on the right of the navigation bar.

BeetleEye logo – Return to the BeetleEye homepage.

Home –Return to the BeetleEye dashboard.

Sources – Manage your sources, including who has access to source data, and your source groups.

Forms – Manage your form data mapping and view received potential lead data. Use the Statistics menu to filter received data by a date range. Additionally, you can set up auto responses to reply when a form is submitted.

Leads – Manage lead data and review information, including connections you have had with each lead.

Lists – Manage lists and dynamic lists to which leads can be added.

Content – Add assets and manage templates for web subscriptions.

Campaigns – Create email templates and set up email campaigns.

Surveys – Create surveys and survey themes.

Advanced Lead Tracking – Manage the events that are tracked on your website and view collected event data.

Sales – Manage auto response emails that are sent to customers before and after a sale is made.

Notifications – Manage email notifications and recipients based on changes in data collected by BeetleEye.

Home / Dashboard

The dashboard is accessed via the Home link in the Navigation bar. The dashboard displays statistics for the source chosen in the dropdown menu at the top of the dashboard. The default source data displays when first loading the dashboard. From the dropdown menu, users can select View All to view all source data.

To change the default source, see the [Default Source](#) section of this guide.

Statistics widgets can be displayed on the dashboard to display a quick view of application data. Users can add available widgets to the dashboard via Settings, found under the profile link. Widgets can be displayed by completing the following steps:

1. Select your name in the top right-hand corner of the screen and select Settings.
2. Within the Select Widgets area, select the box next to each widget that you would like to display on the dashboard.
3. Select the **Update** button.

Selected widgets now display on the dashboard.

Sources

All Sources

BeetleEye is populated with data from a Source, which is often a website that collects this data via forms. You can have multiple sources, with each source having its own data set. When you select a Source, the BeetleEye application displays the data collected from that source.

View sources

To view all sources, complete the following steps:

1. Select the **Sources > All Sources** link in the toolbar.
 - a. The *Sources* page displays.
2. Use the grid tools to search and filter for the desired source.
 - a. **Search** – Use the dynamic search box to search and filter the source results.
 - b. **Grid header** – Use the grid header to sort any column in ascending or descending order.

Add a source

Before adding a new source, a payment plan must be selected. If no plan is selected, the Add Source window will appear after Step 4 and ask you to choose a payment plan.

To add a new source, complete the following steps:

1. Select the **Sources > All Sources** link in the toolbar.
 - a. The *Sources* page displays.
2. Select the **ADD NEW** button.
 - a. The *Add Source* page opens.
3. Enter the requested data.
4. Select the **Save** button.

[See appendices for grid and field descriptions.](#)

Edit a source

To edit an existing source, complete the following steps:

1. Select the **Sources > All Sources** link in the toolbar.
 - a. The *Source* page displays.
2. Select the edit icon [edit icon] for the desired source by hovering your mouse over that row.
 - a. The Source's page opens.
3. Edit the source as desired.
4. Select one of the following actions:
 - a. **Update** button to save changes to the source.
 - b. **Share** button to send an invitation and stay on the Source page.
 - c. Change groups icon [Change groups icon] to change the available data for a shared user.
 - d. Change role icon [Change role icon] to change the permissions level for a shared user.
 - e. Stop sharing icon [Stop sharing icon] to end access for a shared user.

See appendices for grid and field descriptions.

Delete a source

To Delete a source, complete the following steps:

1. Select the **Sources > All Sources** link in the toolbar.
 - a. The *Source* page displays.
2. Select the delete icon [delete icon] for the desired source by hovering your mouse over that row.
 - a. A warning message appears.
3. Select the **Delete** button to delete the source.

Source Groups

A source group is a collection of data from a single source.

Add a source group

To add a new source group, complete the following steps:

1. Select the **Sources > Source Groups** link in the toolbar.
 - a. The *Source Group* page displays.
2. Select the **ADD NEW** button.
 - a. The *Add Source* page opens.
3. Enter the requested data. Refer to the *Source Fields* appendix for a description of the fields.
4. Select the **Save** button.

See appendices for grid and field descriptions.

Edit a source group

To Edit a source group, complete the following steps:

1. Select the **Sources > Source Groups** link in the toolbar.
 - a. The *Source Groups* page displays.
2. Select the edit icon [edit icon] for the desired source by hovering your mouse over that row.
 - a. The *Source Group's* page opens.
3. Edit the source group as desired.
4. Select the **Update** button to save changes and return to the *Source Groups* page.

See appendices for grid and field descriptions.

Delete a source group

To delete a source group, complete the following steps:

1. Select the **Sources > Source Groups** link in the toolbar.
 - a. The *Source Groups* page displays.
2. Select the delete icon [delete icon] for the desired source by hovering your mouse over that row.
 - a. A warning message appears

Sources

3. Select the **Delete** button to delete the source group.

Forms

BeetleEye collects data using forms submitted via your website and then sends this data to a cloud-based database. Once data is received, you decide how the form data is matched against the SDL using visual dropdown lists. This keeps the data structured and unified. Based on user-defined rules, submitted data may or may not result in a lead on a specific list. All form data can be browsed and searched at any time by the user.

All Forms

View forms

To view forms from which data is being collected, complete the following steps:

1. Select the **Forms > All Forms** link in the toolbar.
 - a. The *All Forms* page displays.
2. Use the grid tools to search and filter for the desired form.
 - a. **Search** – Use the dynamic search box to search and filter the results.
 - b. **Grid header** – Use the grid header to sort any column in ascending or descending order.

Edit a form

When editing form data, users have the ability to

- Change the form name
- Update the data mapping of form data
- Add or Remove the user-defined rules applied to the form data

To edit form data, complete the following steps:

1. Select the **Forms > All Forms** link in the toolbar.
 - a. The *All Forms* page displays.
2. Select the edit icon [edit icon] for the desired form by hovering your mouse over that row.
 - a. The *Edit Form* page opens.
3. Edit the form properties as desired.
4. Edit lists rules as desired:
 - a. Add rule – Use the **ADD RULE** button to add new rule criteria.
 - b. Delete – Use the **REMOVE** button to delete rule criteria.
5. Select the **UPDATE FORM** button.

The form is updated in the system.

Export form data

Users can send a range of form data directly to email recipients of their choosing. Form data exports can be completed as a one-time event or as a repeated, scheduled event.

One-time export event

To complete a one-time form data export, complete the following steps:

1. Select the **Forms > All Forms** link in the toolbar.

Forms

- a. The *All Forms* page displays.
2. Select the export icon [export icon] for the desired form by hovering your mouse over that row.
 - a. The *Export Form* page displays.
3. Select the **EXPORT** button located next to the page title.
 - a. The *Export Form* page displays.
4. Edit the form properties as desired.
5. Select the **EXPORT** button to export and send the form data.

See appendices for grid and field descriptions.

Scheduled export event

To complete a repeated, scheduled form data export, complete the following steps:

1. Select the **Forms > All Forms** link in the toolbar.
 - a. The *All Forms* page displays.
2. Select the scheduled exports icon [scheduled exports icon] for the desired form by hovering your mouse over that row.
 - a. The *Scheduled Exports* page displays.
3. Select the **ADD NEW** button located next to the page title.
 - a. The *New Schedule* window displays.
4. Enter the requested data.
5. Select the **CREATE** button to activate the new form export schedule.

See appendices for grid and field descriptions.

View form data

All submitted form data can be browsed and searched at any time by the user.

To view submitted form data, complete the following steps:

1. Select the **Forms > All Forms** link in the toolbar.
 - a. The *All Forms* page displays.
2. Select the view data icon [view data icon] for the desired form by hovering your mouse over that row.
 - a. The *Form Submissions* page opens.
3. Enter desired search criteria, or simply select the **Search** button to search all data records.
 - a. All applicable data records populate the grid.
4. Select the View lead data icon [view lead data icon] on any data row to view details.

You can mark suspicious submissions as spam using the mark as SPAM icon [mark as SPAM icon] on the data row, or using the **MAKE SPAM** button within the Form Data page.

See appendices for grid and field descriptions.

Statistics

BeetleEye users can analyze the number of forms submitted.

Forms

View statistics

To view statistics on submitted forms, complete the following steps:

1. Select the **Forms > Statistics** link in the toolbar.
 - a. The *Forms Statistics* page displays.
2. Select the date range of which you would like to see the number of submitted forms, and then select the **SHOW** button.
 - a. A graphical representation of data is displayed.

Auto Responses

BeetleEye users can save time by setting up auto responses to submitted forms. For example, a lead submits an initial contact form through the website. The lead receives a welcome email, confirming their form was successfully received and asking them to fill out a short survey to hear about what products or topics the lead would like to learn more about.

Add a sales events response

To add a form submission auto response, complete the following steps:

1. Select the **Forms > Auto Responses** link in the toolbar.
 - a. The *Forms Auto Responses* page displays.
2. Select the **ADD NEW** button located next to the page title.
 - a. The *Forms Auto Responses Add* page displays.
3. Enter the requested data.
4. Select the **SAVE** button.

A response email will be sent automatically once the specified form is submitted.

[See appendices for grid and field descriptions.](#)

Leads

A lead represents a single profile that came into the system either via form or API submission, or via a sales record.

The cornerstone of the lead is the unique email address.

Manage lead profiles

Under each lead profile, one can review all the information that is collected for that particular lead, including:

- General data
- Forms submitted
- Sales data
- User collection data
- Campaign data
- Administrative comments
- Associated source groups
- Lead quality*

Many factors are taken into consideration when computing the quality of the lead. For example, a lead that has completed a sale (has a completed sales record) has a lead quality of 100% because this lead is already a customer.

To review and edit lead data, complete the following steps:

1. Select the **Leads** link in the toolbar.
 - a. The *All Leads* page displays.
2. Enter desired search criteria, or simply select the **Search** button to search all data records.
 - a. All applicable data records populate the grid.
3. Select the Edit icon [edit icon] to manage lead profile data.

See appendices for grid and field descriptions.

Add a lead to a list

You can manually add individual leads to a list.

To add a lead to a list, complete the following steps:

1. Select the **Leads** link in the toolbar.
 - a. The *All Leads* page displays.
2. Enter desired search criteria, or simply select the **Search** button to search all data records.
 - a. All applicable data records populate the grid.
3. Select the Add to list icon [Add to list icon] to add the lead to a lead list.
 - a. The *Add to list* window displays.
4. Select the desired list from the dropdown list.

Leads

5. Select the **ADD** button.

The lead is now included in the chosen list.

Before adding a lead to a list, that list must be created using the **Lists** link. See the List section for more information about lists.

To remove a lead from a list, see the Delete a lead section.

See appendices for grid and field descriptions.

Lists

A list is a grouping of leads that are used to build email campaigns. Lists can be created manually or dynamically using the tools under the **Lists** link. A manual list allows a user to add any number of leads. Once a manual list is created, leads are added manually via the **Leads** link. See the Add a lead to a list section for more information. A dynamic list is based on common criteria of leads, as defined by the user. Once a dynamic list is created, all leads that satisfy the indicated criteria are added to that list.

Lists Manager

The Lists Manager allows you to manually add new lists and manage existing lists. You can also edit lead data directly from the List Manager. Refer to the Manage lead profiles section for details about editing a Lead.

Add a list

To add a new list, complete the following steps:

1. Select the **Lists > Lists Manager** link in the toolbar.
 - a. The *Lists Manager* page displays.
2. Select the **ADD NEW** button next to the page title.
 - a. The *Add List* page displays.
3. Enter the requested data.
4. Select the **Save** button.

The new list now appears in the Lists Manager page grid.

See appendices for grid and field descriptions.

Edit a list

To edit a list, complete the following steps:

1. Select the **Lists > Lists Manager** link in the toolbar.
 - a. The *Lists Manager* page displays.
2. Select the edit icon [edit icon] for the desired list by hovering your mouse over that row.
 - a. The *Edit List* page displays.
3. Enter the requested data.
4. Select the **UPDATE** button.

The list data is updated.

You can edit the lead profiles of the leads that are included in this list by selecting the **SHOW LEADS** button at the top of the *Edit List* page. Refer to the Manage lead profiles section for details about editing a lead.

See appendices for grid and field descriptions.

Lists

View list leads

Once you have created a list using Lists Manager and added leads to the list via the **Leads** link, you can use the Lists Manager to view the profiles of the added leads. To view and manage leads from the Lists Manager, complete the following steps:

1. Select the **Lists > Lists Manager** link in the toolbar.
 - a. The *Lists Manager* page displays.
2. Select the view leads icon [view leads icon] for the desired list by hovering your mouse over that row.
 - a. The *All Leads* page displays.
3. Enter desired search criteria, or simply select the **Search** button to search all data records.
 - a. All applicable data records populate the grid.
4. Select the Edit icon [edit icon] to manage lead profile data.

[See appendices for grid and field descriptions.](#)

Delete a lead from a list

To remove a lead from a list, complete the following steps:

1. Select the **Lists > Lists Manager** link in the toolbar.
 - a. The *Lists Manager* page displays.
2. Select the view leads icon [view leads icon] for the desired list by hovering your mouse over that row.
 - a. The *All Leads* page displays.
3. Enter desired search criteria, or simply select the **Search** button to search all data records.
 - a. All applicable data records populate the grid.
4. Select the Delete icon [delete icon] for the desired lead by hovering your mouse over that row.
 - a. The *Delete* window displays.
5. Select the **Delete** button to remove the lead from the list.

The lead is removed only from the specific list. The lead remains in the system, and remains on any other lists to which it has been added.

[See appendices for grid and field descriptions.](#)

Delete a list

To delete a list, complete the following steps:

1. Select the **Lists > Lists Manager** link in the toolbar.
 - a. The *Lists Manager* page displays.
2. Select the delete icon [delete icon] for the desired list by hovering your mouse over that row.
 - a. The *Delete* window displays.
3. Select the **Delete** button to delete the list.

The list is now removed from the system.

Dynamic Lists

A dynamic list is based user-defined criteria that all leads on the list have in common. These criteria, known as Rules, are defined by the user during the list creation process. The rules included in a dynamic list are used to filter the leads in the system to include only those that meet the user-defined criteria.

For example, Jerry wants to create a list that includes only leads with previous sales of greater than \$200.00. He builds a rule in his dynamic list that has a type of Sales and looks at the field total cost with tax. Jerry selects the greater than operator and he enters a value of \$200.00.

Type	Field	Operator	Value
Sales	total_cost_with_tax	>	\$200.00

After validating the rule, he adds the rule to the dynamic list. Now, his dynamic list will use this criterion when pulling leads that have come in to the system.

Jerry can further filter the lead results by adding a second rule. Jerry wants to focus on leads within a 100-mile radius of Atlanta, GA, which is where his office is located. He builds a second rule in the same list that has a type of Near By and indicates the range (100 miles) and city (Atlanta).

Type	Range	Metric	Value
Near By	100	Miles	Atlanta

He again validates the rule before adding the rule to the dynamic list. Now, his dynamic list is based on two criteria: the total amount of a sale and the location of a lead.

Add a dynamic list

To add a dynamic list, complete the following steps:

1. Select the **Lists > Dynamic Lists** link in the toolbar.
 - a. The *Dynamic Lists - Filters* page displays.
2. Select the **ADD NEW** button next to the page title.
 - a. The *Add Filter page* displays.
3. Under Search Rules, define each rules criterion and then select the **CHECK RULE RESULTS** button to validate the criterion.
 - a. If [error icon] is returned, the criterion is invalid and changes are required.
 - b. If [success icon] is returned, the criterion is valid and the rule can be added.
4. Once validated, select the **ADD RULE** button.
 - a. The rule is added and additional rules criterion fields appear.
5. Repeat Steps 3 and 4 for each additional rules criterion.
6. Use the remove rule icon [remove rule icon] to clear any rules criterion.
7. Under New Filter, enter a name for the dynamic list and select the **CREATE** button.

The new list now appears in the *Dynamic Lists - Filters* page grid.

[See appendices for grid and field descriptions.](#)

Edit a dynamic list

To edit a dynamic list, complete the following steps:

1. Select the **Lists > Dynamic Lists** link in the toolbar.

Lists

- a. The *Dynamic Lists - Filters* page displays.
2. Select the edit icon [edit icon] for the desired list by hovering your mouse over that row.
 - a. The *Edit Filter* page displays.
8. Under Search Rules, define each rules criterion and then select the **CHECK RULE RESULTS** button to validate the criterion.
 - b. If [error icon] is returned, the criterion is invalid and changes are required.
 - c. If [success icon] is returned, the criterion is valid and the rule can be added as-is.
3. Once validated, select the **ADD RULE** button.
 - a. The rule is added and additional rules criterion fields appear.
4. Repeat Steps 3 and 4 for each additional rules criterion.
5. Use the remove rule icon [remove rule icon] to clear any rules criterion.
6. Under Search Filter, select the **UPDATE** button.

The list details are updated.

[See appendices for grid and field descriptions.](#)

Delete a dynamic list

To delete a dynamic list, complete the following steps:

1. Select the **Lists > Dynamic Lists** link in the toolbar.
 - a. The *Dynamic Lists - Filters* page displays.
2. Select the delete icon [delete icon] for the desired list by hovering your mouse over that row.
 - a. The *Delete* window displays.
3. Select the **DELETE** button.

The dynamic list is removed.

Content

Users can store campaign-related content directly in BeetleEye, where they can easily organize and manipulate images, files, and other content. In addition, users can build and host subscription forms within BeetleEye, eliminating the need to host these forms on your website. Content and forms are hosted using high-speed Amazon S3 storage engines.

Assets Manager

The Assets Manager allows for easy asset manipulation. Email assets, such as images and files, are easily uploaded to the Asset Manager where users can then access them and include them in email campaigns.

Upload an asset

To upload an asset, complete the following steps:

1. Select the **Content > Assets Manager** link in the toolbar.
 - a. The *Assets Manager* page displays.
2. Select the **ADD NEW** button next to the page title.
 - a. The *Upload Assets* page displays.
3. Drag and drop assets into the greyed box area, or click the greyed box area to open a windows explorer selection window through which you can find the desired assets.
4. Once all assets are listed in the greyed box area, select the **UPLOAD** button.

The assets are now available for email campaigns.

Share an asset

To share a link to an asset, complete the following steps:

1. Select the **Content > Assets Manager** link in the toolbar.
 - a. The *Assets Manager* page displays.
2. Select the Copy file path icon [Copy file path icon] for the desired asset by hovering your mouse over that row.

The asset's file path is now on your clipboard and can be pasted as desired.

Preview an asset

To preview an asset, complete the following steps:

1. Select the **Content > Assets Manager** link in the toolbar.
 - a. The *Assets Manager* page displays.
2. Select the Preview icon [Preview icon] for the desired asset by hovering your mouse over that row.
 - a. The asset displays in a larger window.
3. Select the X in the upper right-hand corner to close the preview window.

Delete an asset

To delete an asset, complete the following steps:

Content

1. Select the **Content > Assets Manager** link in the toolbar.
 - a. The *Assets Manager* page displays.
2. Select the delete icon [delete icon] for the desired source by hovering your mouse over that row.
 - a. The *Delete* window displays.
3. Select the **DELETE** button.

The asset is removed from the system.

Web Subscriptions

Web subscription forms, or white labels, can be built directly in BeetleEye. Users can add individual branding and color schemes to these forms.

In addition, BeetleEye generates subscribe and unsubscribe form links that can be embedded in emails or published on a website.

Create a template

The Create Template feature offers a free-form editor in which certain tokens can be inserted. In addition, any assets that have been uploaded to the Asset Manager can be inserted into the template.

To create a web subscription form template, complete the following steps:

1. Select the **Content > Web Subscriptions** link in the toolbar.
 - a. The *Subscribe / Unsubscribe Template* page displays.
2. Under the Create Template tab, enter the subscription form information into the editor. Users have the ability to add tokens and assets.
3. Select the **UPDATE** button under the editor.

The web subscription template is now created.

Upload a template

Users can upload a template that includes all the files that should be included in the web subscription form. File should be in zip format.

To upload a web subscription form template, complete the following steps:

1. Select the **Content > Web Subscriptions** link in the toolbar.
 - a. The *Subscribe / Unsubscribe Template* page displays.
2. Under the Upload Template tab, select the **Choose File** button.
 - a. A File Explorer window displays.
3. Locate the file on your computer and select the **Open** button.
4. Optionally, check the **Host my Assets** checkbox to add any assets in the zip file to the Assets Manager.
5. Select the **UPDATE** button.

The web subscription template is now uploaded.

Content

Get subscribe / unsubscribe links

Once a web subscription template is available in BeetleEye, subscribe and unsubscribe links can be created.

To get subscription links, complete the following steps:

1. Select the **Content > Web Subscriptions** link in the toolbar.
 - a. The *Subscribe / Unsubscribe Template* page displays.
2. Select the **Get Links** button next to the page title
 - a. The *Links* window displays.
3. Copy the link or links to your clipboard and paste in an email or directly on a website.

Delete a template

To delete a template, complete the following steps:

4. Select the **Content > Web Subscriptions** link in the toolbar.
 - a. The *Subscribe / Unsubscribe Template* page displays.
1. Select the delete icon [delete icon] for the desired template by hovering your mouse over that row.
 - a. The *Delete* window displays.
2. Select the **DELETE** button.

The web subscription template is now removed from the system.

Campaigns

Campaigns are the culmination of data collected within BeetleEye that allows users to connect with customers. Email templates carry the campaign messages to your customers. Email campaigns are where all the details of your campaign are managed. BeetleEye uses Amazon high-deliverability SES engines that guarantee a high level of email delivery success.

Email Templates

BeetleEye allows you to create a new, or upload a pre-made, email template that can be used in your campaigns. You are given a set of tokens that can be embedded into your email templates and that will be replaced in runtime with user data. BeetleEye offers you the ability to preview the completed template in your browser. Templates can be reused multiple times in different campaigns; they are not bound to a specific campaign.

Create email template

To create an email template, complete the following steps:

1. Select the **Campaigns > </> Email Templates** link in the toolbar.
 - a. The *Email Templates* page displays.
2. Select the **CREATE TEMPLATE** button located next to the page title.
 - a. The *Add New Email Template* page displays.
3. Enter a name for the email template.
4. Under the Create Template tab, enter the subscription form information into the editor. Users have the ability to add tokens and assets.
5. Select the **SAVE** button under the editor.

The email template is now created.

Upload Template

Users can upload a template that includes all the files that should be included in the email. File should be in zip format.

To upload an email template, complete the following steps:

1. Select the **Campaigns > </> Email Templates** link in the toolbar.
 - a. The *Email Templates* page displays.
2. Select the **CREATE TEMPLATE** button located next to the page title.
 - a. The *Add New Email Template* page displays.
3. Enter a name for the email template.
4. Under the Upload Template tab, select the **Choose File** button.
 - a. A File Explorer window displays.
5. Locate the file on your computer and select **Open**.
6. Optionally, check the **Host my Assets** checkbox to add any assets in the zip file to the Assets Manager.
7. Select the **SAVE** button.

Campaigns

The email template is now uploaded.

Delete an email template

To delete a template, complete the following steps:

1. Select the **Campaigns > Email Templates** link in the toolbar.
 - a. The **Email Templates** page displays.
2. Select the delete icon [delete icon] for the desired campaign by hovering your mouse over that row.
 - a. The *Delete* window displays.
3. Select the **DELETE** button.

The email template is now removed from the system.

Email Campaigns

Email campaigns are highly configurable and are built using the data collected by BeetleEye and the data defined by the user. Before beginning an email campaign, all data that will be used in the campaign must already be loaded into BeetleEye. For example, before launching a campaign, BeetleEye must have the lead data, list data, assets, and email templates prepared.

When building a campaign, you can select a single list or multiple lists of leads. BeetleEye keeps track of communications and if an email address bounces back as undeliverable, that lead is updated and moved out of your active leads. Additionally, campaign statistics are tracked and displayed in graphical charts under the **Advanced Lead Tracking > Statistics** link.

Add a campaign

To add a campaign, complete the following steps:

1. Select the **Campaigns > Email Campaigns** link in the toolbar.
 - a. The *Email Campaigns* page displays.
2. Select the **ADD NEW** button located next to the page title.
 - a. The *Add Campaign* page displays.
3. Enter the requested data.
4. Select the **CHECK PRICE AND SAVE** button.
 - a. The *Estimated Campaign Cost* window displays.
5. To accept the price and save the campaign, select the **YES** button.
 - a. The campaign is saved.
6. To launch the campaign, select the **START CAMPAIGN** button.

The email campaign is now active.

Users can send a test email by selecting the **SEND TEST E-MAIL** button that appears after the campaign is saved.

Edit a campaign

To edit a campaign, complete the following steps:

1. Select the **Campaigns > Email Campaigns** link in the toolbar.

Campaigns

- a. The *Email Campaigns* page displays.
2. Select the edit icon [edit icon] for the desired campaign by hovering your mouse over that row.
 - a. The *Edit Campaign* page displays.
3. Edit the requested data.
4. Select the **CHECK PRICE AND SAVE** button.
 - a. The *Estimated Campaign Cost* window displays.
5. To accept the price and update the campaign, select the **YES** button.
6. To launch the campaign, select the **START CAMPAIGN** button.

The email campaign is now updated.

Users can send a test email by selecting the **SEND TEST E-MAIL** button that appears after the campaign is saved.

Delete a campaign

To delete a campaign, complete the following steps:

4. Select the **Campaigns > Email Campaigns** link in the toolbar.
 - a. The *Email Campaigns* page displays.
5. Select the delete icon [delete icon] for the desired campaign by hovering your mouse over that row.
 - a. The *Delete* window displays.
6. Select the **DELETE** button.

The email campaign is now removed from the system.

Surveys

Users can create a survey that can be sent to customers or linked to on their website, and is hosted on BeetleEye. Creating a survey does not require any code knowledge. Survey data is gathered and analyzed by BeetleEye, and is viewable via the survey's statistics page within the Survey Manager.

Add a survey

To add a survey, complete the following steps:

1. Select the **Surveys** link in the toolbar.
 - a. The *Surveys Manager* page displays.
2. Select the **ADD NEW** button located next to the page title.
 - a. The *Add survey* page displays.
3. Under Survey information, enter the requested data.
4. Under the Questions area, enter questions information.
5. Complete Step 4 until all questions have been added.
6. To save the survey, select either button:
 - a. Select the **CREATE SURVEY** button to save and return to the Survey Manager.
 - b. Select the **CREATE & EDIT THEME** button to first save the survey and then edit the survey theme. See Edit a survey theme section for details.

The survey is now created.

[See appendices for grid and field descriptions.](#)

Edit a survey

To edit a survey, complete the following steps:

1. Select the **Surveys** link in the toolbar.
 - a. The *Surveys Manager* page displays.
2. Select the edit icon [edit icon] for the desired survey by hovering your mouse over that row.
 - a. The *Edit Survey* page displays.
3. Under the survey name, enter the requested data.
4. Under the Questions area, update question information. Users can edit or delete existing questions, or add new questions, to a survey.
 - a. Edit – Expand a question row using the down-facing caret icon [expand icon] on the question row.
 - b. Delete – Delete a question by selecting the X on the question row.
 - c. Add – Add a question by selecting the **ADD QUESTION** button.
5. Repeat Step 4 until all questions have been updated.
6. To save changes, select either button:
 - a. Select the **UPDATE SURVEY** button to save and return to the Survey Manager.
 - b. Select the **UPDATE & EDIT THEME** button to first save the survey and then edit the survey theme. See the Edit a survey theme section for details.

Surveys

The survey is now updated.

From the *Edit* page, buttons are located next to the page title that allow a user to complete the following actions:

1. View a survey URL
2. Preview a survey
3. View statistics on a survey

See the relevant sections for more information on these actions.

See appendices for grid and field descriptions.

View a survey URL

Once a survey is complete and ready for participants, you can copy the URL and then submit that URL to participants via email, a link on a website, or any other way you would like to share the URL.

To view a survey URL, complete the following steps:

1. Select the **Surveys** link in the toolbar.
 - a. The *Surveys Manager* page displays.
2. Select the View URL icon [View URL icon] for the desired survey by hovering your mouse over that row.
 - a. The *Want to give a link to people in order for them to take your survey?* window displays.
3. Copy the survey URL to your clipboard.
4. Select the **CLOSE** button.

The survey URL is now on your clipboard and you can paste the URL in an email, on a website, or any other text box.

Preview a survey

Once a survey is complete, you can preview the survey to ensure the content and the formatting is correct before sharing it with participants.

To preview a survey, complete the following steps:

1. Select the **Surveys** link in the toolbar.
 - a. The *Surveys Manager* page displays.
2. Select the Preview survey icon [Preview survey icon] for the desired survey by hovering your mouse over that row.
 - a. The survey link opens in a new tab or window.
3. Close the new tab or window to return to the *Surveys Manager* page.

Edit a survey theme

A survey has a default theme that can be changed by the user. This allows a user to include their logo and change the color scheme of a survey. Users can access the *Survey Settings* page three different ways:

Surveys

1. *Add survey page*
2. *Edit Survey page*
3. Theme settings icon [Theme settings icon]

From either page, users will find a **CREATE AND EDIT THEME** or an **UPDATE AND EDIT THEME** button that takes them to the *Survey Settings* page.

These steps assume a user is navigating to the survey settings page from the Theme settings icon [Theme settings icon].

To edit a survey theme, complete the following steps:

1. Select the **Surveys** link in the toolbar.
 - a. The *Surveys Manager* page displays.
2. Select the Theme settings icon [Theme settings icon] for the desired survey by hovering your mouse over that row.
 - a. The *Survey Settings* page displays.
3. Enter the requested data.
4. Select the **SAVE CHANGES** button.

The survey theme is now updated.

From the *Survey Settings* page, buttons are located next to the page title that allow a user to complete the following actions:

1. *View a survey URL*
2. *Preview a survey*
3. *View statistics on a survey*

See the relevant sections for more information on these actions.

View statistics on a survey

Users can analyze survey results from a survey's statistics page.

To view responses to a survey, complete the following steps:

1. Select the **Surveys** link in the toolbar.
 - a. The *Surveys Manager* page displays.
2. Select the View statistics icon [View statistics icon] for the desired survey by hovering your mouse over that row.
 - a. The *Survey Statistics* page displays.
3. Expand each question to view results. Depending on your question type, results may be graphical or text-based.

Delete a survey

To delete a survey, complete the following steps:

1. Select the **Surveys** link in the toolbar.
 - a. The *Surveys Manager* page displays.

Surveys

2. Select the Delete icon [Delete icon] for the desired survey by hovering your mouse over that row.
 - a. The *Delete* window displays.
3. Select the **DELETE** button.

The survey is removed from the system.

Advanced Lead Tracking

Installing a simple JavaScript snippet into the client website allows BeetleEye users to track specific events, automating both the data collection process and any follow-up actions. For example, if a BeetleEye user wants to track when a visitor interacts with any element with a class of <track>, that user can simply add a tracking event in BeetleEye and then upload that snippet to their website. BeetleEye then tracks all events that correspond with the user-defined action.

BeetleEye takes this tracking one step further and tracks form submissions along with anonymous data, which allows BeetleEye to connect personal lead data with anonymous actions. The result is that the lead record within BeetleEye can then be updated with previously anonymous data and viewed by users.

User Journey

Within Advanced Lead Tracking, the User Journey feature allows you to gain an in-depth view of how users interact with your site. The feature displays a visual representation of all a user's recorded events, which can be viewed as all-encompassing, or filtered by campaign. A User Journey begins with a "start event," or the first in a series of events. For example, a user navigates to your site by clicking a link within an email that you sent. Once the user clicks this link, that event is considered the "start event" and any events that are completed after are added to a user's journey.

The collected events are available within the Dynamic Lists feature, where you can filter for select events when building campaigns.

Events

Add an event

BeetleEye tracks all events that have been defined within the BeetleEye system.

To add an event, complete the following steps:

1. Select the **Advanced Lead Tracking > Events** link in the toolbar.
 - a. The *Advanced Lead Tracking Events* page displays.
2. Select the **ADD NEW** button located next to the page title.
 - a. The *Add Advanced Lead Tracking Event* page displays.
3. Enter the requested data.
4. Select the **SAVE** button.

The event will now be tracked by the system.

See appendices for grid and field descriptions.

Statistics

BeetleEye users can analyze tracked events.

To view statistics on tracked events, complete the following steps:

1. Select the **Advanced Lead Tracking > Statistics** link in the toolbar.

Advanced Lead Tracking

- a. The *Advanced Lead Tracking Statistics* page displays.
2. Select the date range in which you would like to see tracked events, and then select the **SHOW** button.
 - a. A graphical representation of event data is displayed.

Sales

Users can automate and customize sales events responses and track sales statistics via the **Sales** link.

Sale Events Response

BeetleEye users can save time by setting up auto responses to sales and scheduling these responses relative to the receipt date. For example, a customer books a hotel reservation through your website. The customer receives a reminder for the reservation three days' prior (pre-sale rule) to the booking start date. That same customer receives a survey email two days after (post-sale rule) the checkout date.

Add a sales events response

To add a sales events response, complete the following steps:

1. Select the **Sales > Sales Events Response** link in the toolbar.
 - a. The *Sales Events Response* page displays.
2. Select the **ADD NEW** button located next to the page title.
 - a. The *Add Sales Events Response* page displays.
3. Enter the requested data. You can configure a pre-sale rule, a post-sale rule, or both.
4. Select the **SAVE** button.

A response email will be automatically sent when the rule criteria is met.

See appendices for grid and field descriptions.

Statistics

BeetleEye users can analyze sales events.

View statistics

To view statistics on tracked events, complete the following steps:

3. Select the **Sales > Statistics** link in the toolbar.
 - a. The *Sales - Statistics* page displays.
4. On any tab, select the date range of which you would like to see sales events, and then select the **SHOW** button.
 - a. A graphical representation of event data is displayed.

You can navigate among tabs using the same date range.

See appendices for grid and field descriptions.

Notifications

BeetleEye can be configured to automatically send an email notification when a form submission meets certain criteria. For example, a notification can be sent every time a form is submitted. A notification can also be configured to send every time a particular field on a form equals a value, such as when a form is submitted with a “Country” value of “Canada.”

Add a notification

To add a notification, complete the following steps:

1. Select the **Notifications** link in the toolbar.
 - a. The *Notifications* page displays.
2. Select the **ADD EMAIL NOTIFICATION** button located next to the page title.
 - a. Rule criteria fields appear on the page.
3. Enter the requested data.
4. Select the **UPDATE** button.

A notification email will be sent automatically when the rule criteria is met.

[See appendices for grid and field descriptions.](#)

Edit a notification

To edit a notification, complete the following steps:

1. Select the **Notifications** link in the toolbar.
 - a. The *Notifications* page displays.
2. Update the rule criteria for the rule that you want to edit.
3. Select the **UPDATE** button.

A notification email will be sent automatically when the rule criteria is met.

[See appendices for grid and field descriptions.](#)

Delete a notification

To delete a notification, complete the following steps:

1. Select the **Notifications** link in the toolbar.
 - a. The *Notifications* page displays.
2. Select the **REMOVE** button next to the rule that you wish to delete.
 - a. The *Delete* window displays.
3. Select the **REMOVE** button.

The notification is removed from the system.

APPENDICES

Icon Descriptions

Throughout the BeetleEye application, icons are used to represent available functions. Refer to the table below for a high-level description of each function.

Icon	Action	Description
[Delete icon]	Delete	Removes the resource from the site.
[Edit icon]	Edit	Edit the properties for the selected resource.
[export icon]	Export data	Launch the Export Form page.
[scheduled exports icon]	Schedule a data export	Launch the Scheduled Exports page.
[view data icon]	View data	Launch the Form Submissions page.
[view lead data]	View lead data	Launch the Form data page.
[Mark as SPAM]	Mark as spam	Mark data from a form submission as spam.
[Add to list icon]	Add to list	Add a lead to a lead list.
[view leads icon]	view leads	View leads on a list.
[error icon]	Invalid Criteria	Criteria entered is invalid. Please edit and try again.
[success icon]	Valid Criteria	Criteria entered is valid. The rule can be added to the list.
[remove rule icon]	Remove a rule	Remove a rule from the dynamic list.
[expand icon]	Expand a row	Expand a collapsed data row.
[View URL icon]	View URL	View a URL that can be copied to the clipboard.
[Copy file path icon]	Copy file path	Copy a file path of an asset.
[Preview icon]	Preview	Preview an asset or email template.
[Preview survey icon]	Preview	Launch URL to preview resource.
[Theme settings icon]	Edit settings	Edit settings for a survey theme.
[View statistics icon]	View statistics	View statistics about resource.
[Change groups icon]	Change groups	Change the available source data for a shared user.
[Change role icon]	Change role	Change the permissions level on a source for a shared user.
[Stop sharing icon]	Stop sharing	End access to a source for a shared user.

Grids

Many sections of the BeetleEye application display data using a grid. Grids offer a user-friendly way to organize and manage resources. Grids allow a user to sort by column, search on, perform bulk actions on, and manage records.

Source

Column	Description
NAME	Name of the source Actions: <ul style="list-style-type: none"> Edit Delete
KEY	Key by which the system identifies the source
OWNER	The owner of the source
MY ROLE	The role of the owner
SHARED	Number of users with whom the source data is shared

Source Groups

Column	Description
NAME	Name of the source group Actions: <ul style="list-style-type: none"> Edit Delete
DESCRIPTION	Description of the source group

Forms

Column	Description
NAME	Name of the form Actions: <ul style="list-style-type: none"> Edit Export Scheduled Exports View data
VALID SUBMISSIONS	Number of valid submissions
SPAM SUBMISSIONS	Number of spam submissions
UPDATED	Amount of time since the last submission

Export Form

Available Exports

Column	Description
NAME	Name of the form
SIZE	Size of the export file
CREATED	Amount of time passed since the export file was created

Scheduled Exports

Column	Description
NAME	Name of the scheduled export

APPENDICES

SCHEDULED REPEAT	Frequency of export Options: <ul style="list-style-type: none">• Every Day• Every Week• Every Month• Every Year
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Form Submissions

Column	Description
IP	The IP address from which the form data was submitted Actions: <ul style="list-style-type: none">• View lead data• Mark as SPAM
POSTED	Amount of time passed since the data was collected
STATUS	Indicates whether the data is considered valid or SPAM

Forms Auto Responses

Column	Description
FORM	Name of the form
TEMPLATE	Name of the applied email template
UPDATED	Amount of time since the auto response was last updated

All Leads

Column	Description
NAME	First and last name of the lead Actions: <ul style="list-style-type: none">• Edit• Add to list
EMAIL	Email address of the lead
QUALITY	Percent rating that indicates the lead data's quality based on criteria such as: <ul style="list-style-type: none">• Quality of forms received• Number of completed sales
UPDATED	Amount of time since the lead record data was updated.

Edit Lead

Forms Tab

Column	Description
FORM NAME	First and last name of the lead Actions: <ul style="list-style-type: none">• View lead data
POST URL	The URL from which the form was submitted
IP	The IP address from which the form data was submitted
STATUS	Indicates whether the data is considered valid or SPAM
POSTED	Amount of time passed since the data was collected

Sales Tab

Column	Description
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APPENDICES

ITEM NAME	Name of the item sold
TOTAL COST WITH TAX	Total cost of the item, including tax
ADDED	Amount of time passed since the item was sold

Advanced Lead Tracking Data Tab

Column	Description
ACTION	Action taken by the user that prompted data collection
VALUE	Element on the website on which user action was taken
URL	The URL from which the data was collected
ADDED	Amount of time passed since the data was recorded

Email Campaigns Tab

Column	Description
CAMPAIGN	Name of the email campaign
STATUS	Current status of the email campaign
OPEN	
RECEIVED	Amount of time passed since the lead received the email campaign

Timeline Tab

Visual representation of the lifecycle of the lead.

Column	Description
LEAD CREATED	Date and time of lead creation
ACTION TAKEN	The type and when an action occurred. Actions: <ul style="list-style-type: none">• Event occurred• Campaign sent• Event triggered

Lists Manager

Column	Description
NAME	Name of the list Actions: <ul style="list-style-type: none">• Edit• View leads• Delete
COUNT	Number of leads included in the list
UPDATED	Amount of time since the list data was updated.

Dynamic Lists - Filters

Column	Description
NAME	Name of the list Actions: <ul style="list-style-type: none">• Edit• Delete
UPDATED	Amount of time since the list data was updated.

Assets Manager

Column	Description
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APPENDICES

PREVIEW	Thumbnail of the asset
NAME	Name of the asset Actions: <ul style="list-style-type: none">• Copy file path• Preview• Delete
SIZE	Size of the asset
CREATED	Amount of time since the asset was added.

Email Template

Column	Description
NAME	Name of the email template Actions: <ul style="list-style-type: none">• Edit• Delete
UPDATED	Amount of time since the email template was updated.

Email Campaigns

Column	Description
NAME	Name of the email campaign Actions: <ul style="list-style-type: none">• Edit• Delete
STATUS	Current status of the email campaign
UPDATED	Amount of time since the email campaign was updated.

Surveys Manager

Column	Description
SURVEY NAME	Name of the survey Actions: <ul style="list-style-type: none">• Edit• View URL• Preview survey• Theme settings• View statistics• Delete
UPDATED	Amount of time since the survey was updated.

Advanced Lead Tracking Events

Column	Description
NAME	Name of the advanced lead tracking event Actions: <ul style="list-style-type: none">• Edit• Delete
ACTION	Action taken by the user that prompted data collection
UPDATED	Amount of time passed since the advanced lead tracking event was updated

Sales Events Response

Column	Description
NAME	Name of the response
UPDATED	Amount of time passed since the response was updated

Resource Fields

Sources

Field	Description
Edit Details	
Timezone	The time zone of the source
Common Name	The name that displays within the BeetleEye application
Send Invitation	
Source Groups	Option to limit shared data by source group
Role	The role assigned to invitees Options: <ul style="list-style-type: none"> • Admin • Edit • View
E-Mail Address	Email address to which an invitation is sent
Shared With	
Search	Search the Shared With grid using data that would appear in any field
NAME	Name of current invitee
E-MAIL	Email address of current invitee
ROLE	Role of current invitee Options: <ul style="list-style-type: none"> • Admin • Edit • View

Source Groups

Field	Description
Name	Name of the source group
Description	Description of the source group

Forms

Edit Form

Field	Description
Form Fields	
Name	Update the name of the form
FIELD NAME	Form field from which data is collected
VALIDATE	Button that validates data
ASSIGNED FIELD NAME	BeetleEye field to which field name data is mapped
RECEIVED DATA	Sample field name data
Lists Rules	

APPENDICES

Select Rule	Rule definition that indicates what data must be present to add a lead to a list Rules: <ul style="list-style-type: none"> • Insert always in list – If form is submitted, add lead to selected list • Insert if field exist – If data is present in the indicated field, add lead to selected list • Insert if field have value – If the indicated field has the indicated value, add lead to selected list
Select Field	Field to which the rule definition applies
Insert Value	Value that the selected field must have for the rule definition to apply
Select List	List to which the lead record is added if the rule criteria is met

Export Form

Field	Description
From	Start of the export date range
To	End of the export date range
Send Export E-Mail to	Email addresses to which exported data is sent

New Schedule

Field	Description
Name	Name of the scheduled export
Type	Frequency of export Options: <ul style="list-style-type: none"> • Every Day • Every Week • Every Month • Every Year
Send Export E-Mail to	Email addresses to which exported data is sent

Statistics

Field	Description
From	Beginning date of queried data
To	Ending date of queried data
View by	Time span by which to view queried data Options: <ul style="list-style-type: none"> • Day • Week • Month • Year
The “View by” option is not available on all Statistics screens	

Forms Auto Responses

Field	Description
Email From Name	Text which appears in the email “From” field
Email Subject	Text which appears in the email “Subject” line
Reply-To Email	Email address to which replies are directed
Select Form	Name of the form being sent
Select Template	Name of the email template to be applied

APPENDICES

Send only if new lead is created.	<p>Checkbox that indicates when to send an auto response</p> <p>Options:</p> <ul style="list-style-type: none"> • If checked, the auto response is sent only if a new lead is created • If unchecked, the auto response is sent every time the form is submitted
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Edit Lead

General Tab

Field	Description
Contact Information	Summary of contact information gathered via forms, APIs, and other sources
Edit Personal Information	Editable fields that allow the user to update contact personal information
Edit Company Information	Editable fields that allow the user to update contact company information
Edit Custom Fields	Editable fields that allow the user to update contact custom fields

Comments Tab

Field	Description
Write Comment	Text box in which the user can add a comment about a lead
SEND MAIL	<p>Link that allows user to email the user who made a previous comment</p> <p><i>This link only appears if comments exist</i></p>

Quality Tab

Field	Description
Quality rating	Explanation of the quality rating given to a lead

Source Groups Tab

Field	Description
Source Groups	<p>List of source groups to which the lead is associated</p> <p><i>If the lead is not associated with any source groups, the user will see the message, "This lead is not associated with any groups."</i></p>

Add to list

Field	Description
Add [email address] to list	Dropdown list of available lead lists to which the lead can be added

Lists

Field	Description
Name	Name of the list
Description	Description of the list
Search Rules	

APPENDICES

Type	Select the type of rule being applied. The selection in this field determines which other fields appear. Options: <ul style="list-style-type: none"> • Leads/Customers • Sales • Near By • Events
Field	Select which collected data field is to be analyzed
Operator	Select how the collected data field will be analyzed
Value	Enter the value the rule criteria is based on
Range	Enter the numerical distance
Metric	Select the distance metric Options: <ul style="list-style-type: none"> • Miles • Kilometers
City	Enter the city from which the range is based
Event	Select the event that will result in a lead being added to the dynamic list
Data Binding Operator	Select whether the rules are cumulative Options: <ul style="list-style-type: none"> • AND • OR
New Filter	
Filter Name	Name of the dynamic list

Email Templates

Field	Description
Name	Name of the email template
Create Template tab	Text editor in which a user can build an email template
Upload Template tab	Area in which user can upload a pre-made email template

Email Campaigns

Field	Description
Email From Name	Text which appears in the email "From" field
Email Subject	Text which appears in the email "Subject" line
Reply-To Email	Email address to which replies are directed
Campaign Name	Name of the email campaign
Email Template	Dropdown list that allows user to select existing email template to apply to the campaign
Start date	Date on which the campaign begins
Start time	Time on which the campaign begins Start time is relative to the source time zone
Select list	Checkboxes that indicate whether leads from a list are included in the email campaign
Test E-Mails (comma separated)	Email addresses with which the email campaign is tested

Surveys Manager

Field	Description
Survey Information	
Title	Name of the survey
Questions to show to users per step	Number of questions that will appear on each page
Text, displayed before the survey	Enter text in this text box to include introductory text on the first screen of the survey
Success text, displayed after the survey has been sent	Enter text in this text box to enable a concluding screen to the survey
Questions	
Question	Text box in which question text is entered
Answers type	Dropdown list of answer-type choices Options: <ul style="list-style-type: none"> • Short Text • Long Text • Multiple-choice • Checkboxes • Dropdown
Answer Validation	Dropdown list of validation choices Options: <ul style="list-style-type: none"> • Number • Email • Required
Horizontal order	Checkbox that indicates answer choices should appear horizontally rather than vertically <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;">Checkbox only appears for some answer types</div>
New Option	Text box in which an additional answer option can be entered <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;">Text box only appears for some answer types</div>
Dropdown title	Text box in which the entered text appears above the answer options
Survey Settings	
Pick your Theme	Dropdown list of available themes to which you can apply to a survey
Customize your Theme	Add a logo or icon to your theme

Advanced Lead Tracking

Field	Description
Name	Name of the advanced lead tracking event
Attribute	Dropdown list of available HTML attributes that can be tracked Options: <ul style="list-style-type: none"> • ID • CLASS • URL PARAMETER
Attribute Value	Text box that indicates the value of the attribute

APPENDICES

Action	Dropdown list of available website actions that can be tracked Options: <ul style="list-style-type: none"> • CLICK • HOVER • PAGE LOAD
Action Value	Text box that indicates the value of the action

Sales

Field	Description
Name	Name of the sales event response
Select field with date	Dropdown list of available date-type fields that are available Options: <ul style="list-style-type: none"> • Arrival Date • Booking Date • Date Reservation was Cancelled • Departure Date • Order Date
Days	Number of days before or after the chosen date that the email is to be sent
Select email template	Dropdown list of available email templates that can be applied to the sales event response

Notifications

Field	Description
Select Rule	Dropdown list of rule criteria that can trigger a notification Options: <ul style="list-style-type: none"> • Send if new lead is created • Send if new form is submitted • Send if field have value (EQUAL) • Send if field have value (LIKE)
Select Form	Dropdown list of available forms which can be selected to trigger a notification
Select Field	Dropdown list of fields on the selected form that can be selected
Insert Value	Text box in which a value is entered Options: <ul style="list-style-type: none"> • If the EQUAL operator is chosen, enter the exact value • If the LIKE operator is chosen, enter the value plus valid wildcards
Send Notification E-Mail to (comma separated)	Email addresses to which notifications are sent