APPLIED®

Applied Marketing Automation

FAQs

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Brand Profiles

How many brand profiles can I create?

You can create as many brand profiles as your company needs. Applied Marketing Automation requires you to at least have one.

Campaigns

What does included vs. excluded mean on my list detail?

The "included" list consists of contacts that are eligible to receive marketing campaigns. The "excluded" list consists of contacts that have either opted-out of marketing communications or have been manually excluded.

Content Library

Can I add my own content?

You can create your own content using the basic HTML editor in the "add content" section of the campaign hub. The content you create will be saved to the specific campaign you are building but will not be saved to the content library.

How do I submit custom content requests?

You can submit custom content requests through the PAC site.

Email Sends

Is there a maximum number of emails allowed to be sent per month?

There is no maximum.

How do I edit a scheduled email send?

You must select "Cancel Scheduled Delivery" in order to edit or change the email send.

Based on who is creating/sending the email, how do email signatures differ?

While creating or sending an email, the user will select the preferred brand profile, including email signature, to associate to the email.

First Time Use

How do I access Applied Marketing Automation for the first time?

A user must log in and access Applied Marketing Automation through Applied Epic, in order to become a user within the system. The user must have a primary email address associated with their Applied Epic Employee account.

How do I add a new user to the Applied Marketing Automation system?

Once an admin user has been created by logging in for the first time, you can utilize the Import Users function found in within Applied Marketing Automation's Configure area to add your Applied Epic users. You can access this within Applied Marketing Automation by clicking Configuration-> Configuration Basics-> Users tab. You can then configure the individual user permissions within this Users tab so they are fully set up before granting security permissions from within Applied Epic in Configure-> Security-> Users.

Within Epic Users you will want to modify the User's Program Access to ensure they are granted access to Marketing Automation, or this can be done by editing the Program Access for their Security Group. This permission is found within Program Access in the General area.

How do I know the Applied Marketing Automation system is active?

You will receive an email from your Applied Marketing Automation Specialist stating that your DNS is active. Once you receive this email, you can then start using Applied Marketing Automation to generate marketing emails.

Reporting

What Applied Epic ctivities (Events/Codes) are available to be created from Applied Marketing Automation?

@OME	One-Off Marketing Email Sent
@MES	Marketing Campaign Email Sent

How do I see what was sent to each client/prospect?

In Applied Marketing Automation, you can view the history of emails for contacts. You can locate these by searching by the contact name, business name, account name or their email address.

With the Applied Epic Activity Events/Codes defined to automatically be created from Applied Marketing Automation, you can also view what was sent to each client/prospect by reviewing the activities for that account within Applied Epic.

If you have not chosen to turn off the event or hide the activities, all emails sent from Applied Marketing Automation will add either the One-Off Marketing Email Sent or the Marketing Campaign Email Sent so you can easily filter and view just the Applied Marketing Automation history in their activities.