



# Navigating the Content Library

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Applied Marketing Automation is first and foremost a content library platform that enables you to deliver the right information to the right audience at the right time.

You and your team will have access to this library with over 1,000 pieces of timely and compliant industry-specific content for both internal uses and for your Benefits and/or P&C clients that you can deliver in multiple ways.

Today we will go over the navigation and some key features of the Content Library.

The first thing you see when you enter into Applied Marketing Automation is the Dashboard on the Homepage. This section is divided into two areas - curated content from the content library and the search navigation pane. We will begin with the Curated Content carousels

In the middle of your screen are the three major sections of the Content Library displaying curated content:

- **What's New**

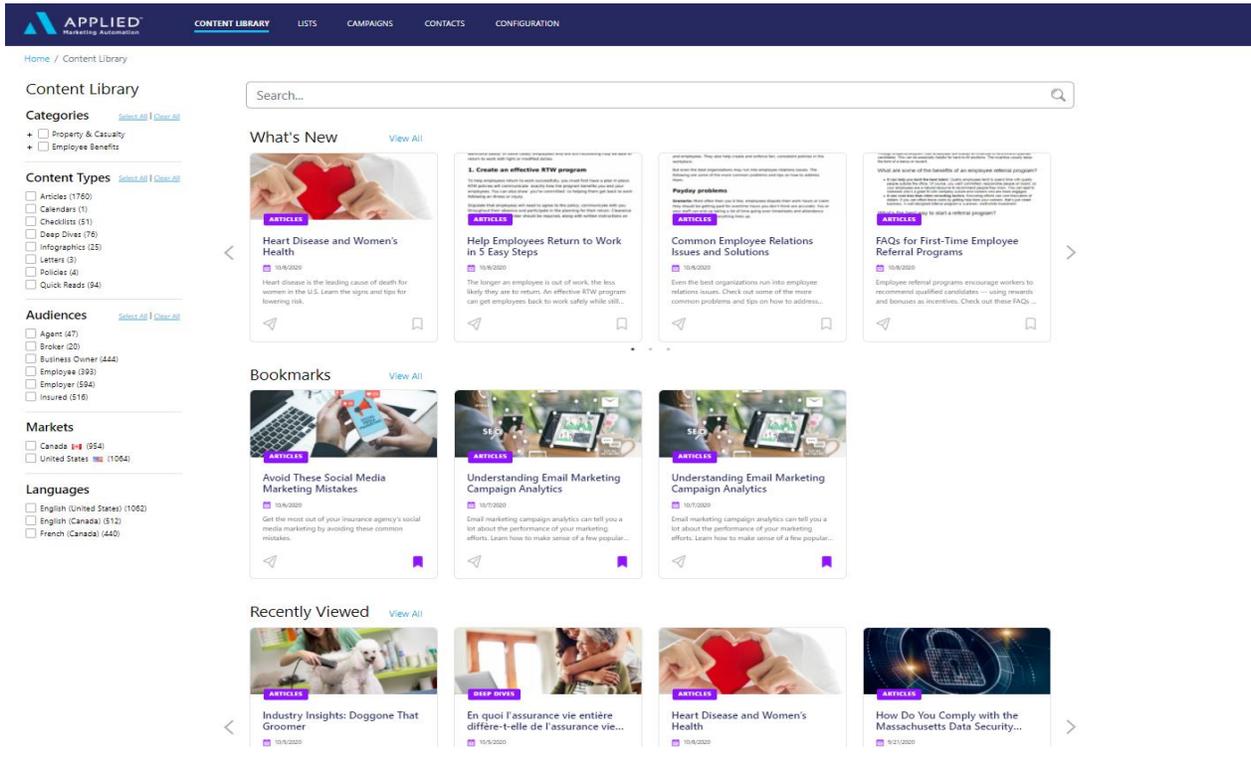
- Shows the last 12 items that were uploaded to the Content Library.
- On the bottom of the thumbnails, you will see the Content Type, Publish Date, Bookmark icon, and Send icon.
- At the top of this section, you'll also see the words "View All" in light blue. You can use this to see Library Content in List View.

- **My Bookmarks**

- Shows content that you have boomed as indicated by the bookmark icon on the bottom right of the thumbnail.
- This feature is user-specific. Each Applied Marketing Automation user will have their own content marked as their personal favorites.

- **Recently Viewed**

- Shows up to 12 of the content pieces the user has recently viewed.
- This, like Bookmarks section, is also specific to the user.

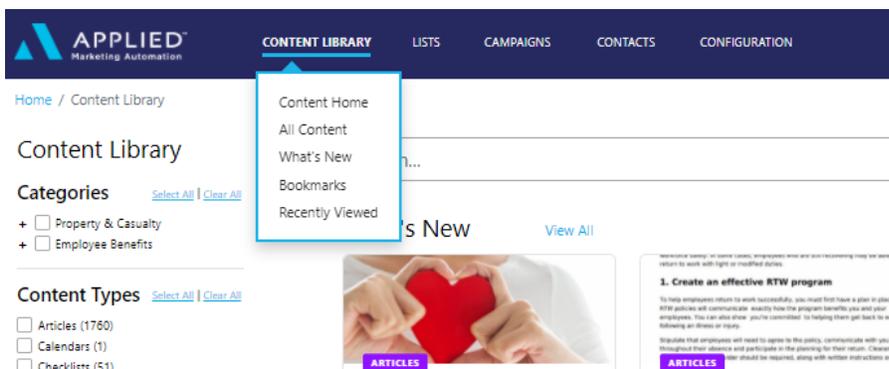


## Search Navigation Pane and Toolbar

On the top left you will see a full navigation bar with tabs labeled: Content Library, Contacts, Lists, Campaigns, Configuration. We are going to start by going into the Content Library tab.

- **Content Library Tab**

- The Content Library can be used to navigate to the three content curated sections as well as All Content within the Content Library.



## Search Panel

### Content Library

#### Categories

[Select All](#) | [Clear All](#)

- +  Property & Casualty
- +  Employee Benefits

#### Content Types

[Select All](#) | [Clear All](#)

- Articles (1760)
- Calendars (1)
- Checklists (51)
- Deep Dives (76)
- Infographics (25)
- Letters (3)
- Policies (4)
- Quick Reads (94)

#### Audiences

[Select All](#) | [Clear All](#)

- Agent (47)
- Broker (20)
- Business Owner (444)
- Employee (393)
- Employer (594)
- Insured (516)

#### Markets

- Canada 🇨🇦 (954)
- United States 🇺🇸 (1064)

#### Languages

- English (United States) (1062)
- English (Canada) (512)
- French (Canada) (440)

Across the top of the page is a Search bar where you can search by key terms and phrases to find content. The left panel is where you can filter down your search to find specific articles. You'll see the following filter options:

- **Search** - The Search feature can be used to find specific titles or library content that may have a specific keyword or topic.
- **Categories** - Shows articles specific to the department you'd wish to search within (i.e., P&C and Benefits)
- **Library Content-Type** - Shows all of the types of content within the Content Library
  - Checklist(s): includes sales funnel creation checklists, OSHA first aid, loss exposure checklists, etc.
  - Infographics for employers
  - Web Articles that contain industry-specific thought leadership, cross-sell, upsell, and legislative news
  - Deep dives
- **Market** - The Market filter helps you find library content that is specific to your country or region.

## Drilling Down – Bookmarks, Metadata, & Action Buttons

Now, to dive into some of the key features when interacting with the Library Content - let's start with "Bookmarks"

- Before we choose a favorite, move to list view in "What's New" by clicking "View All"
- Click one of the bookmarks next to an article - you have now bookmarked this article. When we go back to the home screen you will see this article under "What's New".

The screenshot displays the 'Content Library' interface. On the left, there are filters for Categories (Property & Casualty, Employee Benefits), Content Types (Articles, Checklists, Deep Dives, Infographics, Quick Reads), Audiences (Agent, Broker, Business Owner, Employee, Employer, Insured), Markets (Canada, United States), and Languages (English, French). The main area is titled 'What's New (97)' and features a search bar, a 'Sort Order' dropdown set to 'Newest to Oldest', and a 'View' dropdown set to 'What's New'. A list of six articles is shown, each with a thumbnail, title, description, and a 'New' badge. The articles are: 'Heart Disease and Women's Health', 'Help Employees Return to Work in 5 Easy Steps', 'Common Employee Relations Issues and Solutions', 'FAQs for First-Time Employee Referral Programs', 'Understanding Email Marketing Campaign Analytics', and 'What Are Your Federal Poster Requirements?'. A pagination bar at the bottom indicates 'Displaying 1 - 25 of 97'.

Now that we have an article bookmarked, let's see the components of an article in Applied Marketing Automation.

- Click the article we just added to "Bookmarks" to open it
  - You can also do this in List View by simply clicking the article name

- **Metadata**

On the left side, you'll see what we call the article's metadata. **Metadata** is a set of data that describes and gives information about other data or information such as articles and other literature. The metadata shown here includes:

- The **title** of the article
  - Both on the left and above the article graphic
- A short **description** of what the article is about
- The **date** the article was published
  - This will help with picking content that is the most up to date for your insured
- **Categories** this article belongs in (i.e., Employee Benefits or P&C)
- **Keywords** - or topics associated with this article and its contents
- The **content type** (i.e., article, whitepaper, table, etc)
- **Audience** (employers, employees, insureds, etc.)
- **Market** - or which country this should appeal to
- **Translation** - this is relevant for organizations in Canada as they can toggle between English and French.
  - If French is not listed, the article is only available in English
- Lastly, the **Bookmarks** icon, which will be filled if this has been added as a bookmark.

The screenshot displays the 'APPLIED' Content Library interface. The top navigation bar includes 'CONTENT LIBRARY', 'LISTS', 'CAMPAIGNS', 'CONTACTS', and 'CONFIGURATION'. The main content area is titled 'Heart Disease and Women's Health' and includes a sub-header: 'Heart disease is the leading cause of death for women in the U.S. Learn the signs and tips for lowering risk.' Below this, it shows 'Last updated: 10/9/2020'. The metadata section lists: Categories: Employee Benefits; Keywords: stroke, heart attack, heart disease, women's health, cardiovascular disease; Type: Article; Audience: Employee; Market: United States; Translations: English (United States); and a Bookmarks icon. At the bottom, there are dropdown menus for 'Branding Profile' (set to 'ISA Agency Branding') and 'Format' (set to 'PDF'), along with 'Download' and 'Send' buttons. A preview window on the right shows the article's title, a red heart graphic, and introductory text.

## Action Buttons

Underneath the metadata, we see two drop-downs (Branding Profile and Format) and some action buttons (Download and Send) that lead to different actions within Applied Marketing Automation.

- **Branding Profile (Dropdown)**

The Branding Profile dropdown allows you to set the desired branding to apply to the content item. The options displayed within this dropdown are based on what your admin has set up within Configuration and added to your User permissions.

You can change the branding profile by clicking the dropdown and selecting a different profile. This is helpful for organizations that brand based on department or producer

The content preview to the right will update to display the selected branding profile.

- In the Content Body section, you will see the logo, agency name, and (if added to the branding profile) your organizations tag line and website appear above the content title
- As you scroll down, you will see the branding continue in the footer of the content showing the organization name, contact information, social media links (if configured), and any standard footer text to be included with communications you send.

- **Format (Dropdown)**

The Format dropdown provides options for what file types the content can be downloaded as. For most content it may only be available to download as PDF, but some document-based content types may also be available to download in Word document format to allow for additional customization or branding.

- **Download (Action Button)**

Below the dropdowns, you see the Download button. Clicking the Download button from here will download the full content item as shown in the preview in the chosen format.

- Downloading this content is helpful for quick personal emails that may not require an Applied Epic Activity being logged or for internal agency use.

- **Send (Action Button)**

Now that we have downloaded the content, let's choose the Send feature. We can also choose to send directly from any content library view using the Send icon, but right now let's click the Send button on the Content Details page.

This is the email form - which is relatively standard, however, there are some key features to keep in mind as you send your email through Applied Marketing Automation:

- The recipient of your email in the To section must be in Applied Epic as a contact first.
- Click the Find Contact buttons to search your Applied Epic database to find the right contact(s) you would like to send to. Once you have selected contacts, you will be returned to the email form with those contacts in the To field.

Find Contacts

Locate Epic contacts. You may select up to 10 contacts for this email.

Search Options

Search for contacts who are internal employees

First Name: Enter full or partial contact first name  
Last Name: melton  
Business Name: Enter full or partial business name  
Email Address: Enter full or partial email address  
Account Name: Enter full or partial account name  
Search

CONTACT NAME ▲	CLIENT TYPE	CONTACT TYPE	ACCOUNT NAME	EMAIL ADDRESS
<input type="checkbox"/> Patricia Melton	Epic Insured	Individual	Patricia Melton	mmelton@appliedsystems.com

Displaying 1 - 1 of 1

Select

Heart Disease and Women's Health

Preview Email

- The **From** as well as the **Reply-to** must be an email address in Applied Marketing Automation
  - Often, users will send from a producer or other member of the organizations but reply to a universal mailbox that is checked regularly (ex: [info@appliedsystems.com](mailto:info@appliedsystems.com))
- The **Branding Profile** is the same feature as when we clicked the Branding Profile dropdown earlier.

- The **Subject line** must be filled in, but it is customizable so you can put anything you'd like!
  - For tips on Subject Line best practices, check out our helpful Subject Line Best Practices doc in our Applied Marketing Automation Hub.
- **Email Body** is where you can add additional notes or a lead into the content to personalize it a little more to the recipient

APPLIED Marketing Automation

CONTENT LIBRARY | LISTS | CAMPAIGNS | CONTACTS | CONFIGURATION

Home / Content Library / What's New / Details / Send Email

Send Email

To: \*  [Find Contacts](#)

From: \*

Reply To: \*

Subject: \*

Branding Profile: \*

Email Body: \* 

Paragraph **B** *I* U
  
  
 0 WORDS

[Insert Merge Variable](#) [Test Merge Variables](#)

Link: [Heart Disease and Women's Health](#)

[Preview Email](#)



- Once all of this is filled out you can preview the email to see exactly what will be sent to your contact(s). From the preview, once you press "Send" there will be an email confirmation letting you know this content has been sent to your recipient.

After the email is sent an Activity is created in Applied Epic. To see this Activity, let's go to Applied Epic:

1. Access Applied Epic
2. Locate the Account
3. Click "Activities"
4. Click "Closed Activities"
  - Note: If you have customized your Activity configuration to leave these Open by default you will find them under Open Activities
5. From here you can see who sent the email, a note that links to the email that was sent, and that the Activity is automatically closed.



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