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Mautic Documentation

Introduction

This Gitbook repository serves as the documentation for Mautic, the open source marketing automation system.

Everyone is welcome to contribute to improve this information as needed.

Download documentation as a PDF

Download the official Mautic documentation as a PDF in:

- English
- French
- Japanese

Mautic Developer documentation

If you are looking for details about the Mautic API, webhooks, theme or plugin development, please see the developer documentation.

Contributing to the Mautic documentation

See CONTRIBUTING

License

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!

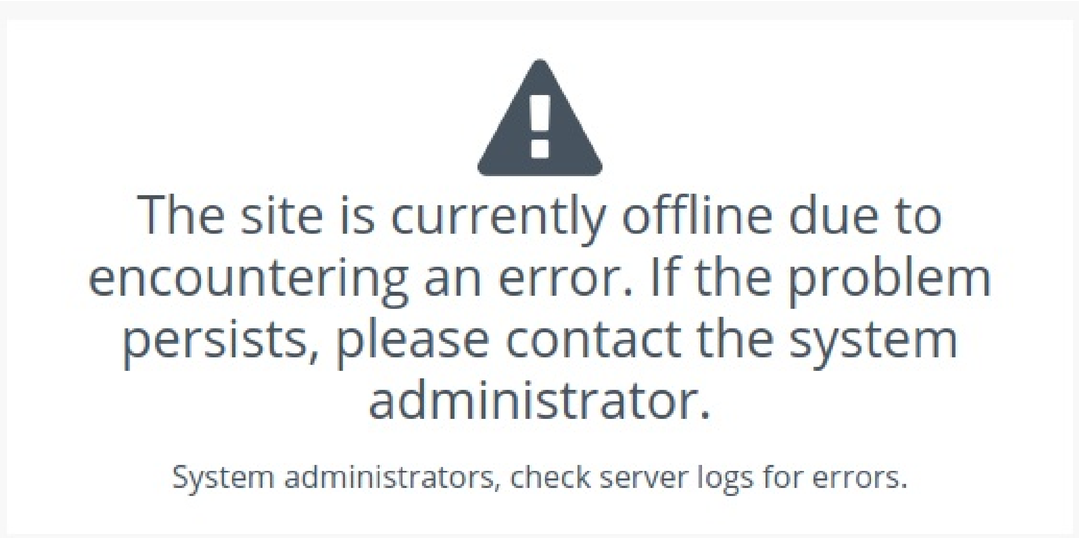
Step 1: Install Mautic

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.

As an example, if your domain is `example.com` and you have unzipped the file into a folder called `mautic`, you would then browse to `https://example.com/mautic` to start the installation process.

Permission errors

If you see errors when you try to access the installation as below:



the problem is likely to be due to the permissions on your files and folders.

If you have access to the command line, you can run the following commands to reset the file and folder permissions. Ensure you are in the directory where Mautic has been installed.

Finding your website root directory

Depending on your server configuration, the default path to a *website* is usually something similar to `/var/www/website` or `/var/www/website/public_html`. For Apache this is the `DocumentRoot` path and for nginx it is the `root` path.

> NB: the *website* is also known as *site*, *vhost*, *virtualhost* or *server block*.

Continuing the example above, that would mean executing these commands within the `/var/www/example.com/mautic` directory.

File ownership

The owner of the files is probably going to be `www-data` in a VPS/EC2/Droplet environment, and your user ID in a shared hosting environment.

In a shared environment, start with this:

```
cd /var/www/example.com/mautic
chown -R $USER:www-data .
```

and continue with the `find` and `chmod` commands below.

In a VPS/EC2/Droplet, you will need to prefix `sudo` to change the permissions and ownership.

```
cd /var/www/example.com/mautic
sudo chown -R www-data:www-data .
```

and continue with the `sudo` prefix for the commands below:

- `sudo find ...`
- `sudo chmod ...`

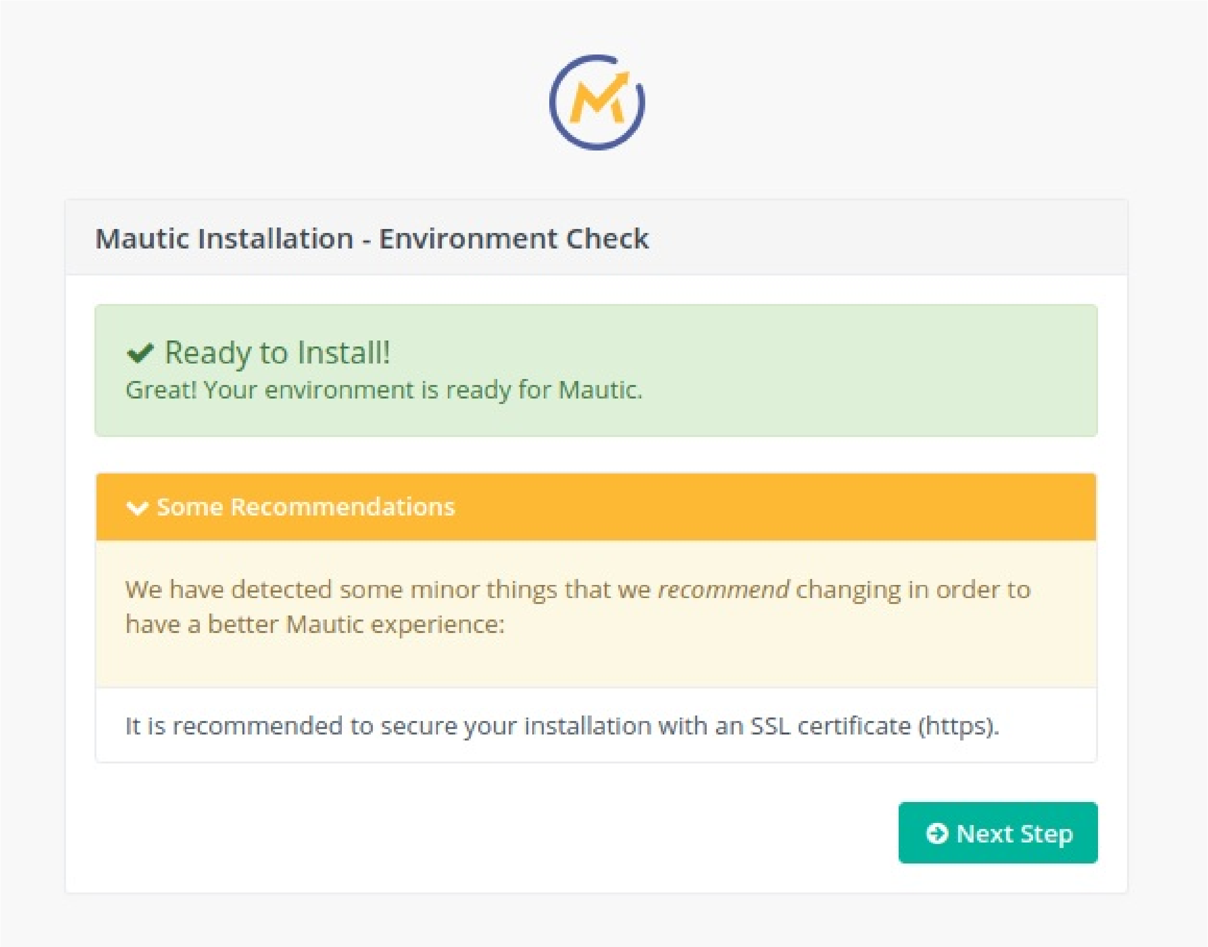
```
find . -type d -not -perm 755 -exec chmod 755 {} +
find . -type f -not -perm 644 -exec chmod 644 {} +
chmod -R g+w app/cache/ app/logs/ app/config/
chmod -R g+w media/files/ media/images/ translations/
```

Pre-flight checks

Once the permissions are correct, you should see the 'pre-flight checks' which ensures that your server is running software compatible with Mautic.

Critical issues will be displayed in red and will not allow you to proceed until you resolve them, as Mautic cannot run unless you fix these problems.

Advisory issues will be displayed in orange. These issues are 'should fix', however you will be able to proceed with the installation without resolving them.

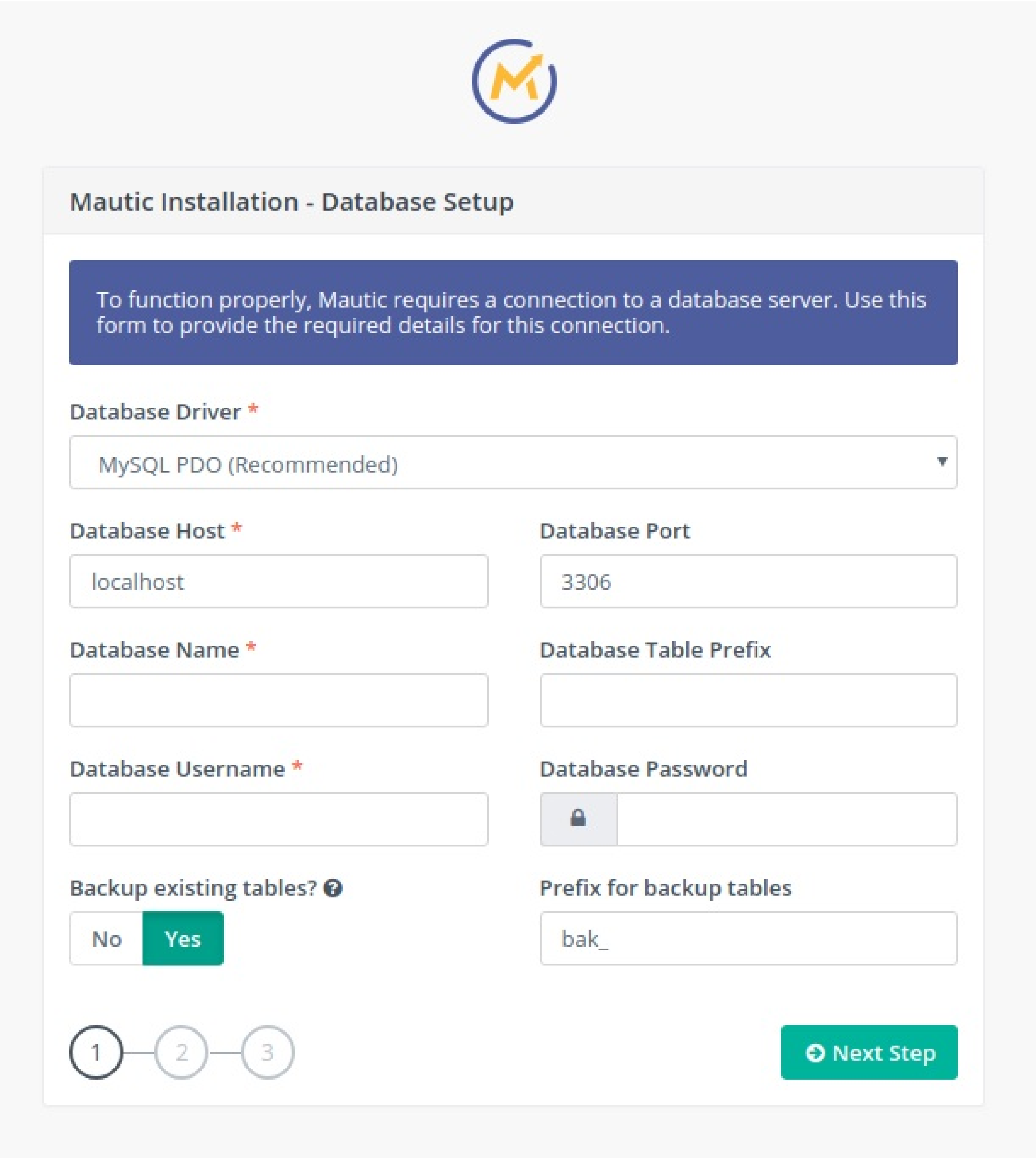


In the example below, you can see that we are being *advised* that we should secure our Mautic instance with an SSL certificate. You might see other warnings relating to PHP extensions that are necessary to provide certain non-essential features such as IMAP email inbox checking and internationalisation - you should determine whether these are important to you, and fix them as appropriate.

Refreshing this screen after fixing the issues (and, where appropriate, restarting your PHP server) will update the list and advise you of any remaining issues to be addressed before installing Mautic.

Database setup

In the next step you will be asked to provide the details for a database that Mautic will use. The database needs to be MySQL with InnoDB support, at a minimum version of 5.5.3.



The host will often be localhost and the port 3306, but check this with your hosting provider if you experience problems. Ideally you will have already created the database for Mautic to use, but if you haven't, ensure that the user has permission to create new databases.

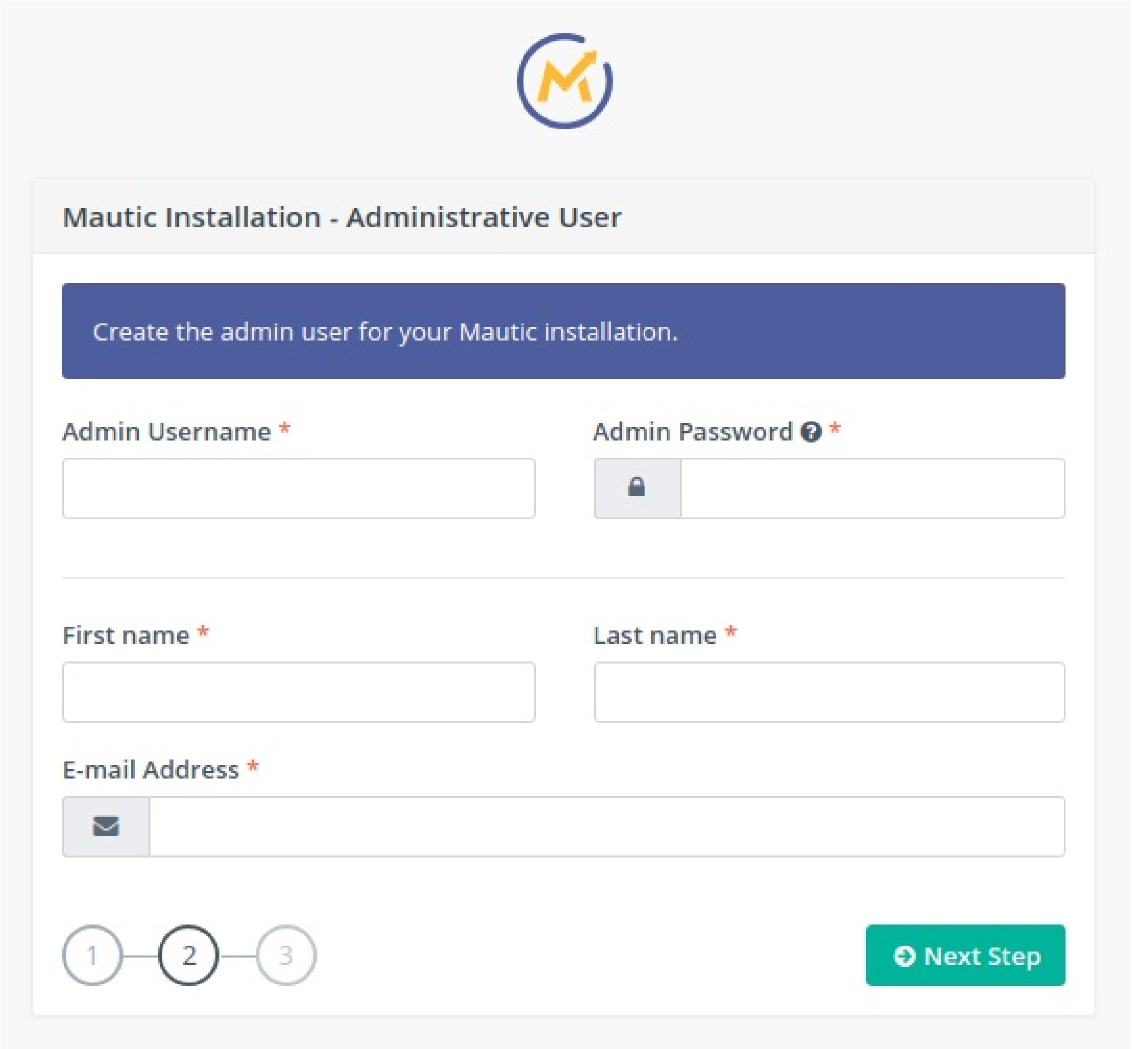
Enter the database name, prefix (eg. mau_) which will be prepended to all tables that are created, and provide the username and password for a user with access to the database.

The options for backing up existing tables only apply if you are installing multiple Mautic instances in the same database - in which case you may want to back up any tables that already exist using the same prefix, using the backup table prefix bak. *This will rename any existing tables it finds using the same prefix of mau* so that they will become bak*mau*. It is safe to leave this enabled, just in case there are tables already existing!

This step may take a few minutes to complete, as the database is created and populated.

Admin user

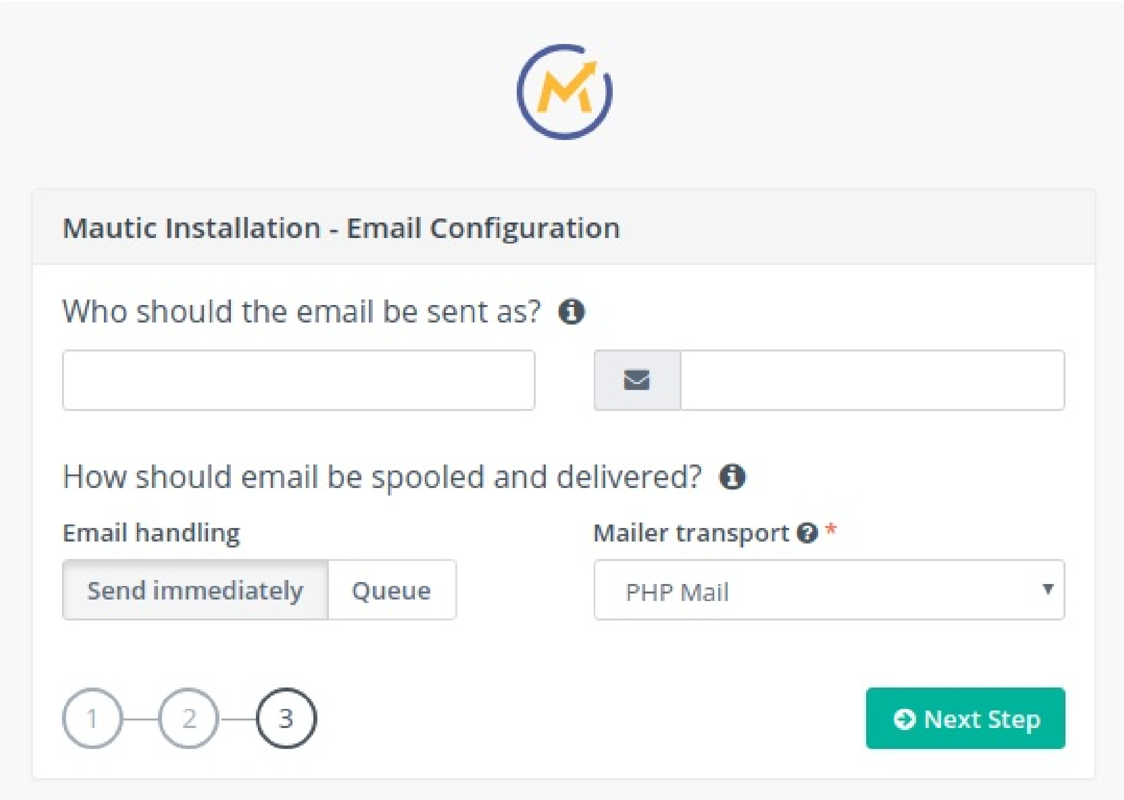
The next step after creating the database is to set up your administrator account. This will be the account you use to log into Mautic for the first time.



Enter a username, password, first and last name and an email address, and the account will be created for you.

Email configuration

The next step allows you to configure the way in which email is sent from your Mautic instance.



If you are testing, whether locally or on a live server, it is highly recommended to make use of Mailhog or similar to capture all outgoing emails, until you are ready to send to real recipients. Otherwise, in a production environment you will need to choose whether you want to send email immediately, or queue email (and process it when the Cron job runs), and provide the appropriate server, port, encryption type, credentials and authentication mode for the systems you wish to use.

Admin login

Now you have completed the setup process, you will be directed to the back-end login screen at `http(s)://example.com/mautic/s/login` - this is where you log into your Mautic to manage your instance, so it's worth bookmarking the login page for future reference.

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. (Please note: "/path/to/mautic..." will reflect the directory where your version of Mautic is installed, and you may need to replace 'php' with the path to PHP on your server. Ask your hosting provider if you are not sure.)

Updating Segments

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

Update Campaigns

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

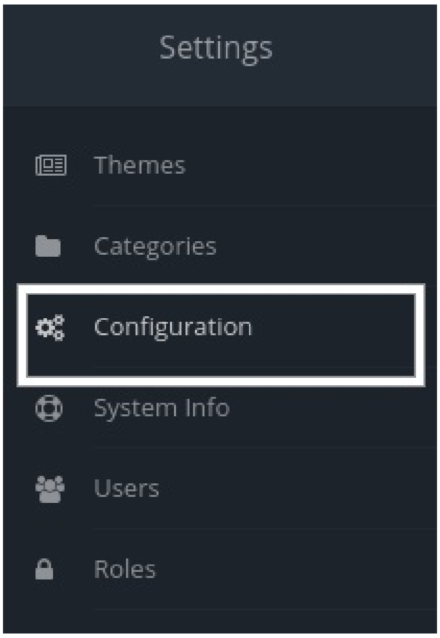
Execute Campaign Actions

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

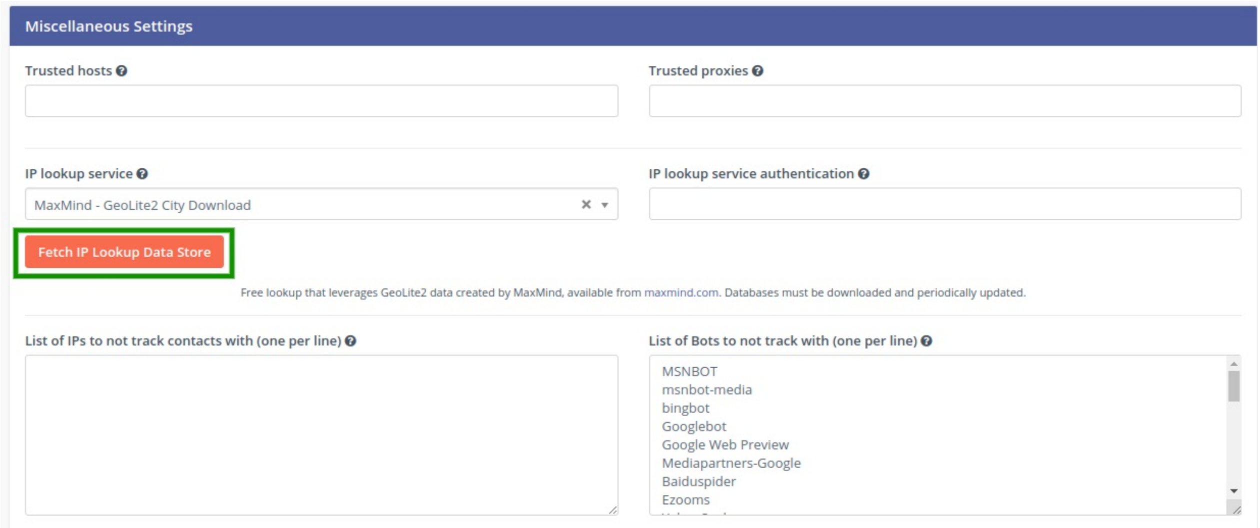
Review Cron Jobs for more information on these and other optional cron jobs.

Step 3: Download the IP lookup service database

By default, Mautic is configured 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. This is where most of the configuration takes place.



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 which you can access by clicking on 'Tracking Settings':

```
(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','https://example.com/mautic/mtc.js','mt');

mt('send', 'pageview');
```

You will need to change the site URL (replace example.com/mautic with the URL to your Mautic instance) 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

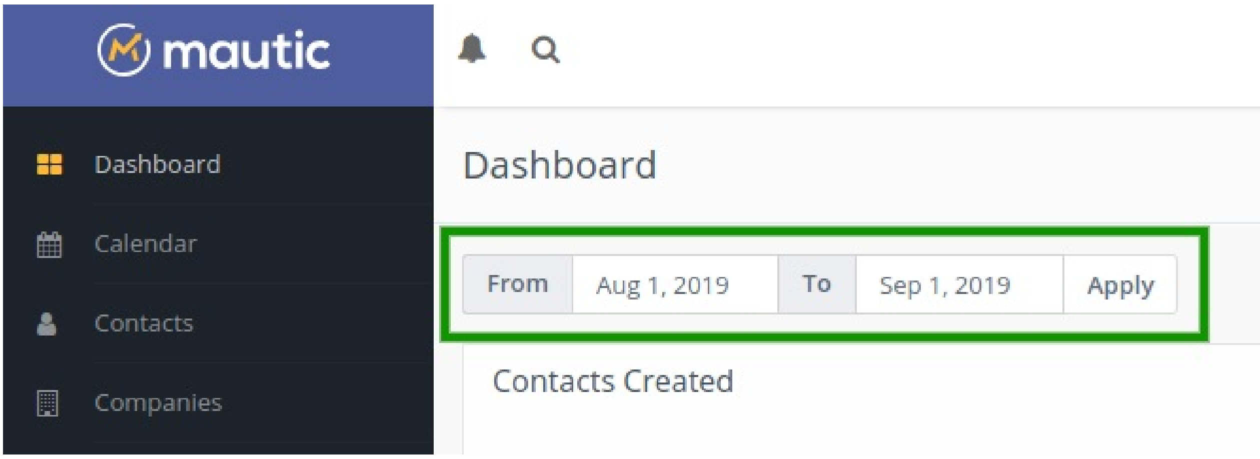
For more information on this watch this video.

Dashboard

Mautic 1.4.0 brought a customizable dashboard where each user can compose widgets with information they want 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: data will be displayed in hours Date range is between 1 and 31 days: data will be displayed in days Date range is between 32 and 100 days: data will be displayed in weeks Date range is between 101 and 1000 days: data will be displayed in months Date range is greater than 1001 days: data will be displayed in 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%. The 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 consistent height for each widget in the same row.

Some widgets have additional options:

Created contacts over time

- Show all contacts: Displays one line with all created contacts.
- Only identified: Displays one line with only created and identified contacts.
- Only anonymous: Displays one line with only anonymous visitors.
- All identified vs anonymous: displays 2 lines with anonymous visitors and known contacts.
- Top segments: Displays up to 6 lines representing the number of 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 representing the top 3 segments for the selected date range. Each segment will show 2 lines with anonymous visitors and known contacts.

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 be moved on the dashboard using the drag and drop interface. Click and hold on the name of the widget to move it to another position.

Dashboard export

Each dashboard, once configured, can be exported to a single file and shared with others. You can make a backup, send it to a colleague or share it online. It exports only the widget configuration - the data which it pulls is not included in the exported file.

Dashboard import

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

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

Previewed - This will display the dashboard widgets for preview. The dashboard will be loaded using your existing Mautic data. Nothing is saved or changed. Applied - This sets the dashboard as your primary dashboard. Warning: Your current widgets will be deleted by this action! Export the current dashboard if you want to go back to it later. Deleted - This will delete the predefined dashboard.

Widget cache

The WidgetDetailEvent automatically caches the widget detail data for a period of time defined in the configuration. The 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, they won't be able to create widgets for that bundle. However, the widget can still be visible on their dashboard. For example if a user creates the widgets and then the admin removes the permission for that bundle, or if a user imports a dashboard which has widgets for bundles they are not permitted to access. In these cases, the widget is displayed on the dashboard, but with a message that the user doesn't have permission to see the data.

If a Mautic user has permission to see only their own data from a bundle, they will see only their own data in the Dashboard widgets. For example only contacts which they own, page hits of the pages they 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

You can use the filter in the Contacts screen to display only visitors by using the following command in the search bar above the contacts list:

```
is:anonymous
```

Screenshot

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

Standard Contacts

The second type of contact is a standard - or known - contact. These contacts have identified themselves via a form or other source. You may also have more information about them from previous interactions, or from a third-party system such as a Customer Relationship Management (CRM) tool. 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 which have enabled you to connect up the activity on your website with a known person. You can nurture these contacts through the Mautic marketing automation platform, learn more about their behaviour, and take specific actions as a result of this information.

The Manage Contacts section provides more information on how you can work with contacts in Mautic.

Manage Contacts

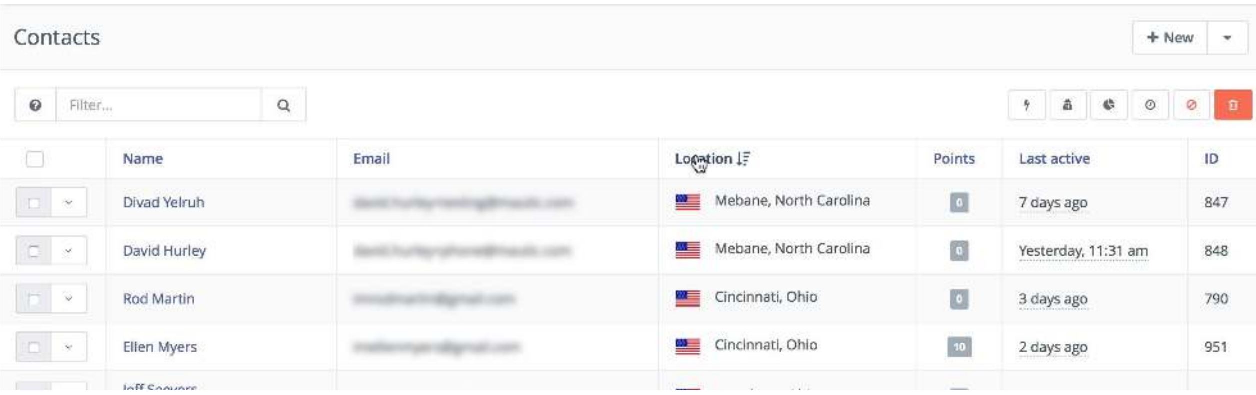
The manage contacts page is the main interface through which you can view and interact with your contacts - both visitors and standard contacts.

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. Using keyboard shortcuts you can enter "t" on your keyboard to dynamically switch to table view (default) and "c" to switch to the card view.

Searching for contacts

A 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 enquiry 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

Note: Before you start adding contacts, you may need to add custom fields to capture all the information you require.

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 populate existing 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. You may need to add custom fields using the steps detailed here.

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 a contact's actions (such as 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

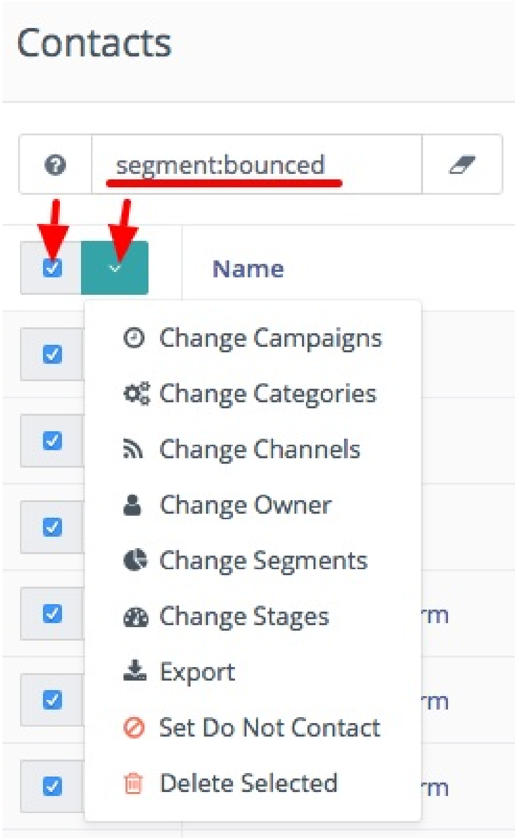
If Mautic knows only the IP address, it will merge the contact action (page hit, form submission etc.) with a contact with the same IP address. If the IP address does not exist in the Mautic database yet, it will create a new contact. But if Mautic knows the unique cookie, it will merge the actions to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

Batch Actions

There are batch actions you can carry out from the user interface. A modal window will be displayed when you click on one of the actions, with more configuration details. You can use this feature to quickly update large volumes of contacts, but it might be better to use a campaign action (e.g. add all the users you need to update into a segment and use a campaign to trigger the change) if you need to change more than a few hundred contacts at a time.



The following batch actions are currently available:

Change Campaigns

Allows you to add/remove the selected contacts to/from campaigns.

Change Categories

Allows you to add/remove the selected contacts to/from global categories.

Change Channels

Allows you to subscribe/unsubscribe the selected contacts to/from communication channels (email, SMS, etc.) and also define frequency rules.

Change Owner

Allows you to assign/unassign the selected contacts to/from an owner (a Mautic user).

Change Segments

Allows you to add/remove the selected contacts to/from segments. Note that if a contact is added or removed to or from segment manually, then segment filters won't apply for them in that particular segment.

Change Stages

Allows you to add/remove the selected contacts to/from a specified stage.

Export

Allows you to export selected contacts to CSV.

Set Do Not Contact (DNC)

This action will set all selected contacts as DNC for the email channel, and it allows you to provide a custom message as "reason" for why the contacts were manually unsubscribed by a Mautic user.

Batch Delete

The batch delete action in the contact table allows the deletion of up to 100 contacts at a time. This limit is there as a performance precaution, since deleting more contacts at a time could cause performance degredation issues.

If you need to delete large numbers of contacts, visit the segment docs awhich explains how to delete thousands of contacts easily.

Contact Overview

Each contact has a detail page where you can see what Mautic knows about them.

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 their 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.

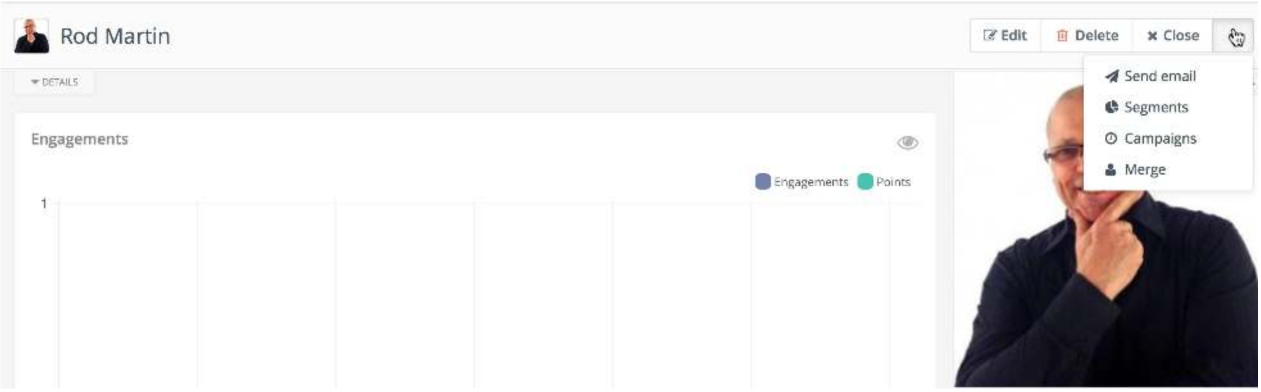
Social

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 their 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 they travel, 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.

Note that by default, Mautic will not track traffic originating from the same private network as itself, but this internal traffic can be configured to be tracked by setting the `track_private_ip_ranges` configuration option to `true` in `app/config/local.php` and then clearing the symfony cache.

Javascript (JS) tracking

JS tracking method was implemented in Mautic 1.4 and recommended as the primary way of website tracking. To implement it,

1. go to Mautic > *Settings* (click the cogwheel at the top right) > *Configuration* > *Tracking Settings* to find the JS tracking code build for your Mautic instance
2. insert the 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.

Beginning in Mautic 2.13, the tracking code also supports company fields. Mautic can assign a company to your tracked contact based on company name. Then you have to add **company** or **companyname** parameter to tracking code along with other companies fields (companyemail, companyaddress1, companyaddress2, companyphone, companycity, companystate, companyzipcode, companycountry, companywebsite, companynumber_of_employees, companyfax, companyannual_revenue, companyindustry, companyindustry, companydescription...):

```
mt('send', 'pageview', {email: 'my@email.com', firstname: 'John', company: 'Mautic', companyemail: 'mautic@mautic.com', comp
```

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.

Identify visitors by tracking URL

Mautic 2.9 add to Configuration option for identifying visitors by tracking URL. If enabled, returning visitors will be identified by tracking URL from channels (especially from emails) when no cookie exists yet.

Note: Email contact field have to be marked as unique indentifier and publicly updatable in Configuration.

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.

Google Analytics and Facebook Pixel tracking support

Mautic supports contact tracking in Google Analytics and Facebook pixel. Go to Mautic Configurations Tracking Settings tab and setup:

- Google Analytics ID
- Facebook Pixel ID

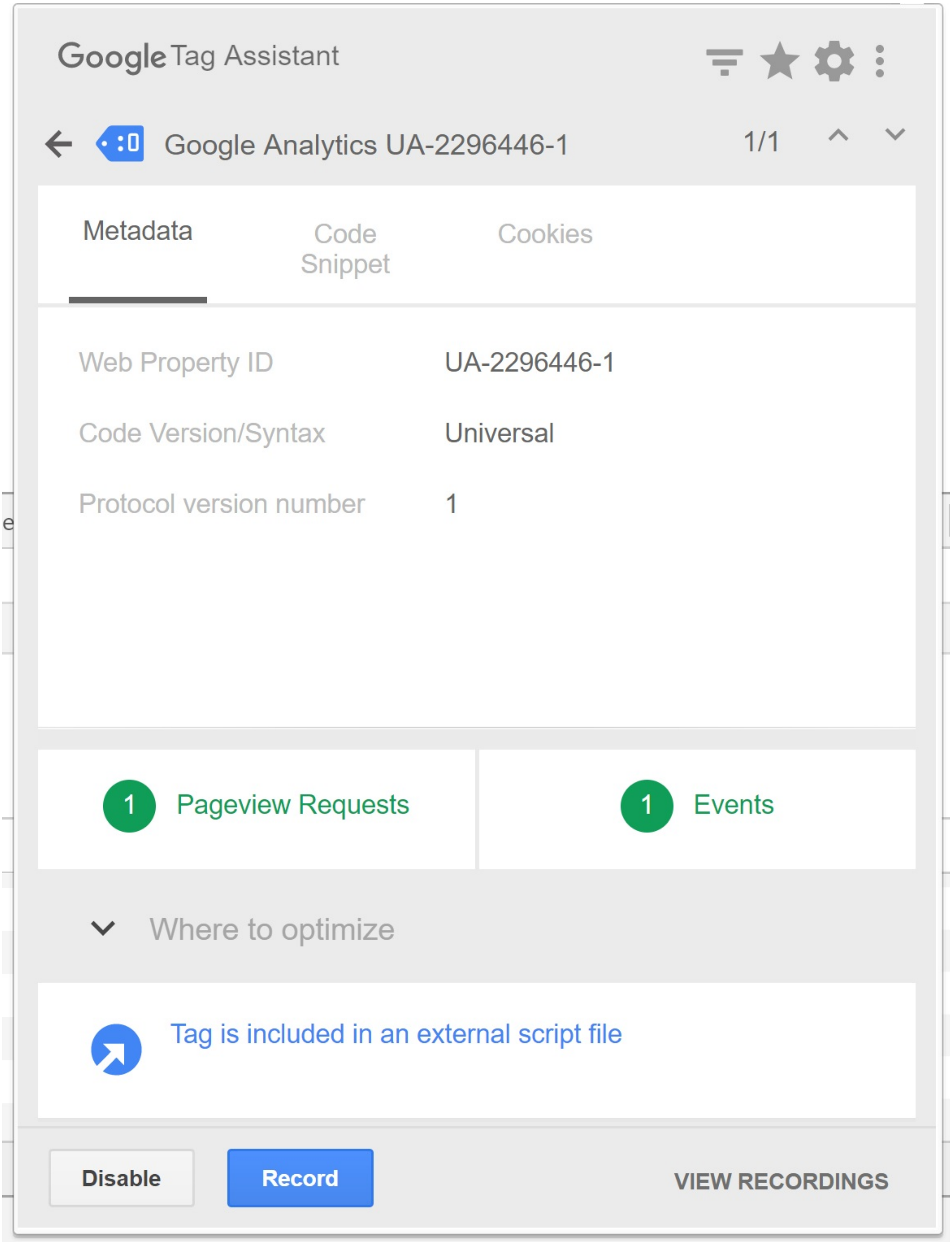
Tracking codes support also Google Analytics USERID and Facebook Pixel Advanced Matching .

Campaign action Send tracking event

Action allow send custom event to Google Analytics or Facebook Pixel and depend on Visits a page decision.

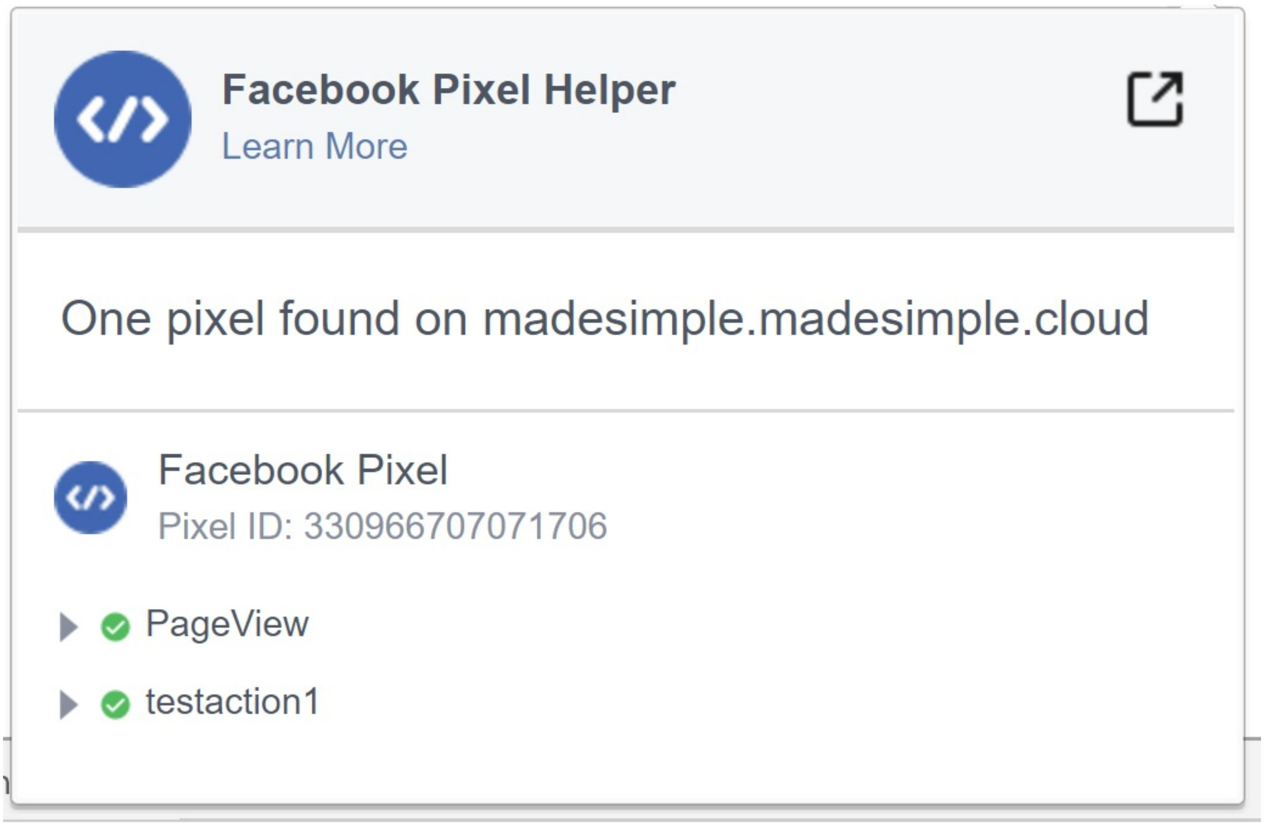
How to test Google Analytics tracking code and campaign action

- Install Tag assistent and enable recording on your website
- Create campaign with Visits a page decision and Send tracking event action
- Test it and see Tag assistent debug window with one Pageview request and 1 events



How to test Facebook Pixel tracking code and campaign action

- Install Facebook Pixel Helper
- Create campaign with Visits a page decision and Send tracking event action
- Test it and see Facebook Pixel Helper debug window with one Pageview and one custom event action



Events should use for Remarketing with Analytics and Remarketing for Facebook Ads

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

Importing Contacts

Contacts can be imported via the user interface from a CSV file. You can import from the browser or in the background via a cron job.

> Background import is recommended.

Since Mautic 2.9, when an import job creates or updates a contact, you'll see that action in the Contact events history.

Import file requirements

- The CSV file must be in UTF8 encoding. Other encodings may cause troubles while importing. Read the documentation of your spreadsheet program on how to export a spreadsheet to UTF8. Google Sheets encodes to UTF8 automatically, Libre/Open Office lets you choose before export.
- For boolean values like `doNotEmail` or custom boolean field, use values `true` , `1` , `on` or `yes` as TRUE value. Anything else will be considered false.
- For date/time values, use ISO8601 notation i.e. `YYYY-MM-DD hh:mm:ss`
    - Example: `2019-01-02 19:08:42` . Other formats may work too, but they may be problematic.

Tips

- Use a header row, with the column names matching the 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 to `{contactfield=firstname}` .

- 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.

> **ProTip**
>
> If using a Linux system, see the GNU parallel command. (sudo apt install parallel)
>
> ```
> cat big_contact_list.csv | parallel --header : --pipe -N 1000 'cat > split_list_part{#}.csv'
> ```
>
> This will generate files:
>
> split_list_part1.csv ...split_list_part9.csv, split_list_part10.csv ...

Types of import

Browser import

Larger CSV files have to be imported in batches to avoid hitting server (PHP) memory and execution time limits. When importing in the browser, your browser is controlling the batches. When one finishes, the javascript starts a new one. This means the browser window **has** to stay opened and connected to the internet the whole time.

Use the browser import method only if you don't have any other choice. Background import is recommended.

Background import

Background import jobs (CLI command triggered manually or via a cron job) have the advantage of benevolent time limits. A CSV background import is not restarted every batch (1 batch = 100 rows by default) - the last row imported is saved, and the next batch continues from that point. Background imports will always be faster and more reliable than browser imports.

This option is available since Mautic 2.9.

Warning background import require the command `php /path/to/mautic/app/console mautic:import` to run periodically. Add it to your cron jobs.

Successful result of the background job can look like this:

```
$ app/console mautic:import
 48/48 [============================] 100%
48 lines were processed, 0 items created, 48 items updated, 0 items ignored in 4.78 s
```

If there is no import waiting in the queue, there won't be any messages (or use `--quiet`).

Automatic import type configuration

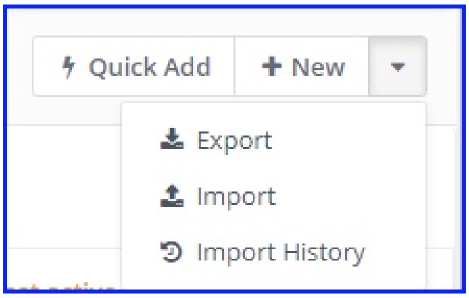
There is an option in the Global Mautic *Configuration* / *Contact* settings to define what is the optimal limit of browser import vs background import. If you enter `500`, that means that if the CSV file being imported has less than 500 rows, it will be imported in the browser. If it has more than 500 rows, it will be queued to be imported by the background job. Default value is 0 (zero), which means it will show two Import buttons instead of one and you have to decide what import option to use during every import.

Parallel imports

The import can take several minutes. It's possible that one import will still run when the other will be started. To prevent running out of server resources, there is the `parallel_import_limit` configurable option. By default only 1 import will run at the same time. This option can be changed when you add it to your `app/config/local.php` file.

Import job list

The list of imports can be found when you go to the *Contacts* area, open the action menu above the contacts table and choose the *Import History* option.



> **ProTip**
>
> The direct URL is `https://example.com/s/contacts/import/1`

The table will show you:

- basic statistics about all imports

- their current status
- original CSV file names
- who created the import
- when it was created
- when the background job (System) last updated the statistics

There is also the toggle switch which will enable you to stop and start **Queued** or **In Process** imports.\ This type of switch is used throughout the Mautic UI to publish and unpublish items.

Import job status

There are several potential statuses for import jobs:

- **Queued** - The import was created and queued for background processing. At this stage the import is waiting for the background job to start the import.
- **In Progress** - The background job started the import and it hasn't finished yet. You can see the progress in the list of the imports.
- **Imported** - The import was successfully processed.
- **Failed** - The import failed for some reason. Most usual cause may be that the uploaded CSV file was removed or Mautic doesn't have permission to read it. Or the import was unresponsive for more than 2 hours.
- **Stopped** - The import has been stopped by the user when it was in the **Queued** or **In Progress** states.
- **Manual** - The user selected to import in the browser "manually". It's similar to **In Progress**.
- **Delayed** - The background job wanted to start the import, but the import process could not start. So it's delayed for later. The reason when this could happen is when the parallel import limit was hit. The import will start ASAP.

Import job detail

Clicking on a filename opens the import job detail page.

The main content area displays information about rows which were ignored for some reason (if any). The table will tell you what row in the CSV file it was and what was the reason, so you can fix those rows and start the import again.

There are two charts:

1. The pie chart shows the ratio between created, updated and failed rows.
2. The line chart shows how many contacts have been added per minute.

More detailed statistics and the import job configuration are available if you click on *Details*. This includes import speed, field mappings, and job timestamps.

Starting and stopping imports

How to start an import

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.

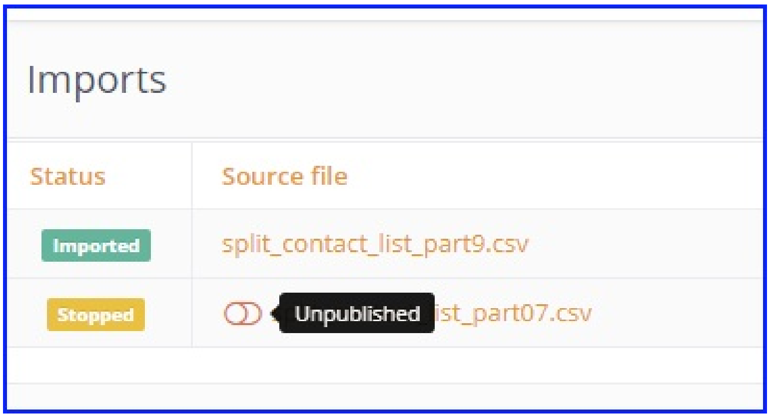
   > **ProTip**
   >
   > The direct URL is `https://example.com/s/contacts/import/new`

3. Select the CSV file with contacts you want to import.
4. Adjust the CSV settings if your file uses a non-standard delimiter or encoding and so on.
5. Upload your CSV file.

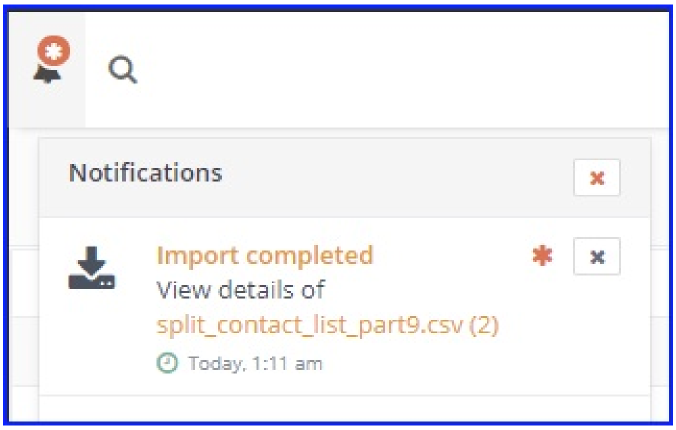
6. The field mapping page should show up. The first set of options will let you select owner, segment and tags to assign globally to all imported contacts. The second set of options will let you map the columns from your CSV file to Mautic Contact Custom Fields. The third set of options will let you map columns from your CSV file to special Contact attributes like *Date Created* and so on.
7. When your field mapping is ready, click on one of the *Import* buttons (described above).

How to stop a background import

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 History* option.
3. Unpublish the import job you want to stop. The import will change status to **Stopped**. It will finish importing the current batch and then stop.
4. To start the import again, simply publish it and the background job will continue with the next cron job execution.



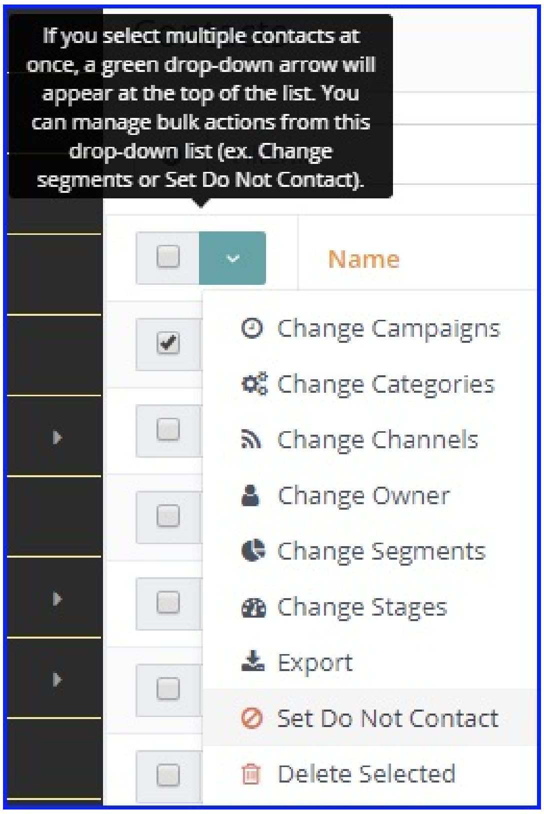
When the background job finishes, either successfully or if it fails, you'll get a notification in Mautic's notification area about it.



FAQ

Q: My import times out. What can I do about that? A: Either use the background job to import or change the batch limit to smaller number than 100.

Q: If I import *Do Not Contact* values, is that stored as a bounce or a unsubscription? A: It is stored as a Manual Unsubscription. It is the same as if the Contact was marked as *Do Not Contact* from the *Contacts* page.

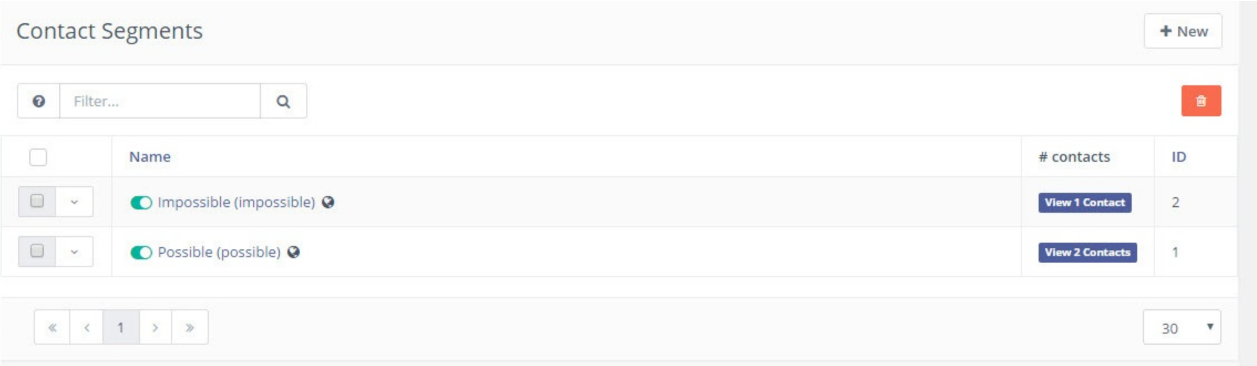

If you select multiple contacts at once, a green drop-down arrow will appear at the top of the list. You can manage bulk actions from this drop-down list (ex. Change segments or Set Do Not Contact).
Name
Change Campaigns
Change Categories
Change Channels
Change Owner
Change Segments
Change Stages
Export
Set Do Not Contact
Delete Selected

Manage Segments

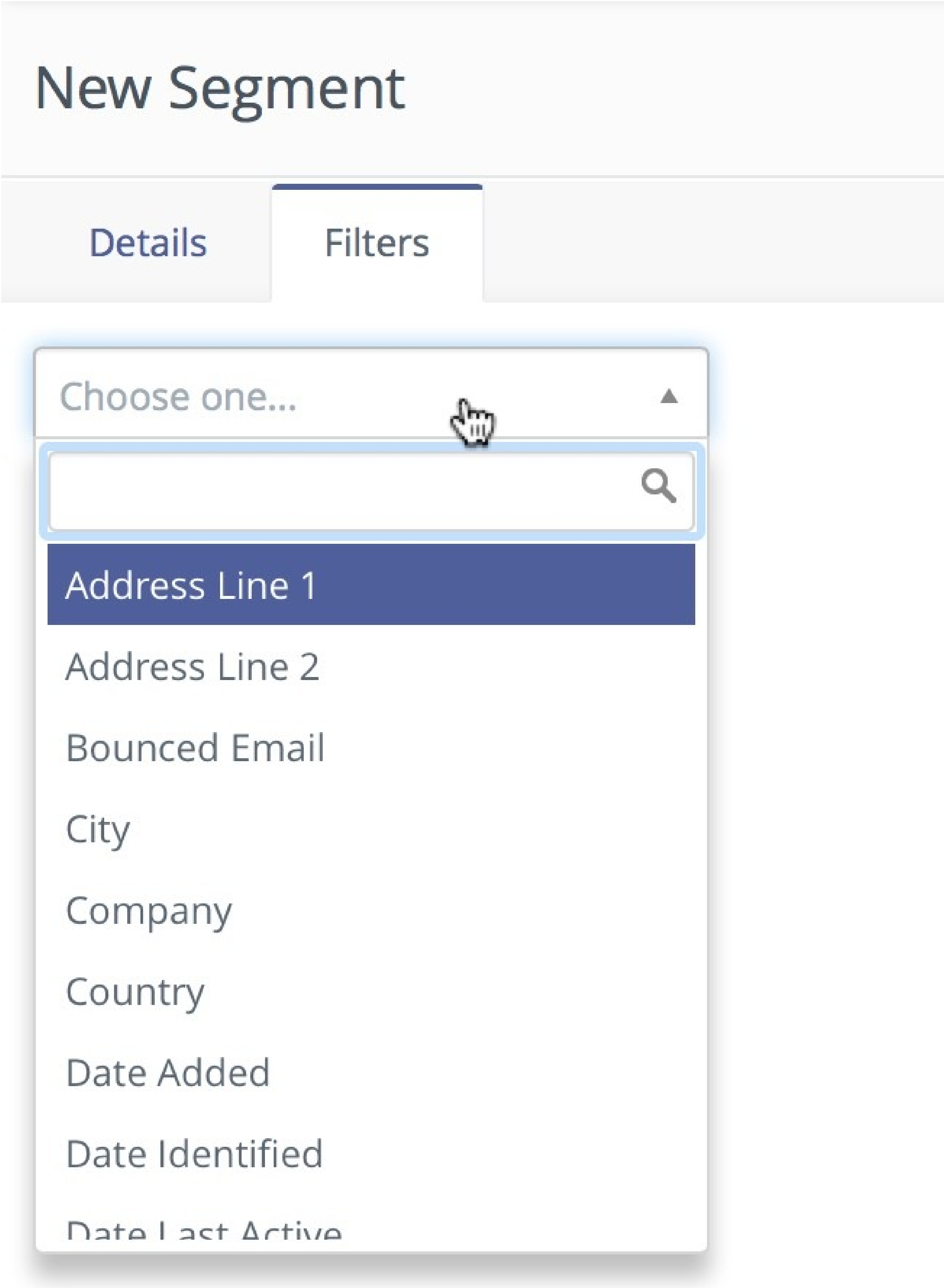
Lead lists were renamed to segments in Mautic 1.4.0.

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

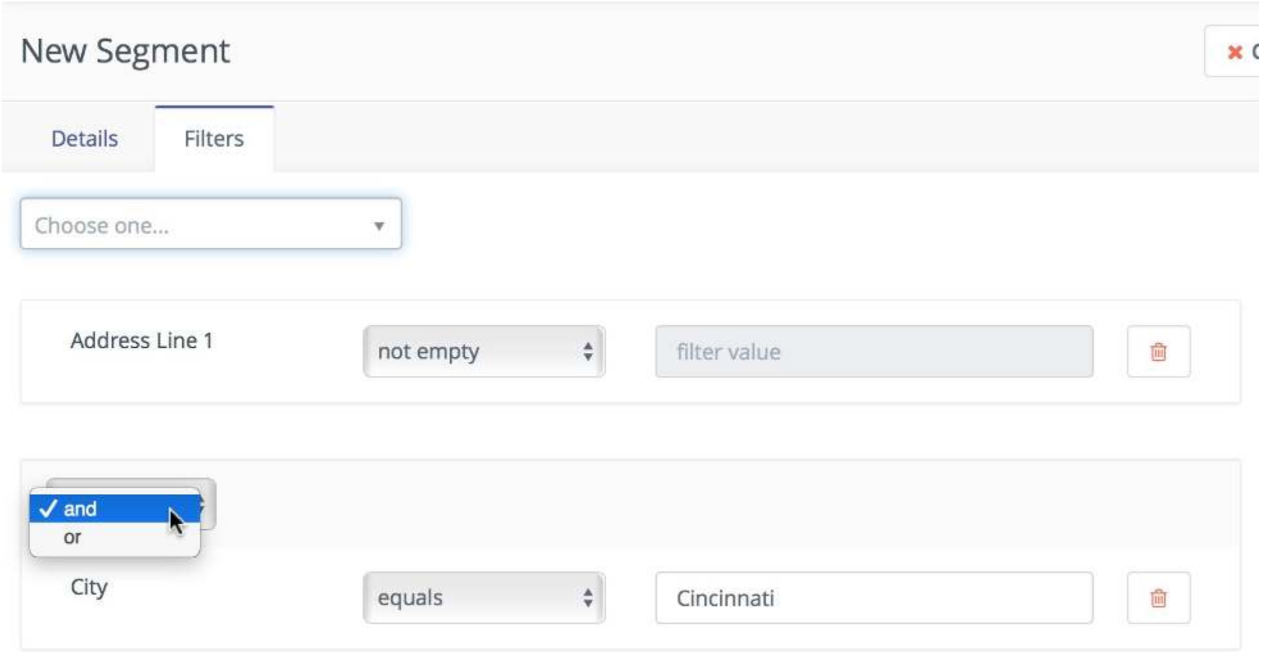
When viewing all segments you will notice the column on the right which shows the number of contacts matching that particular segment.



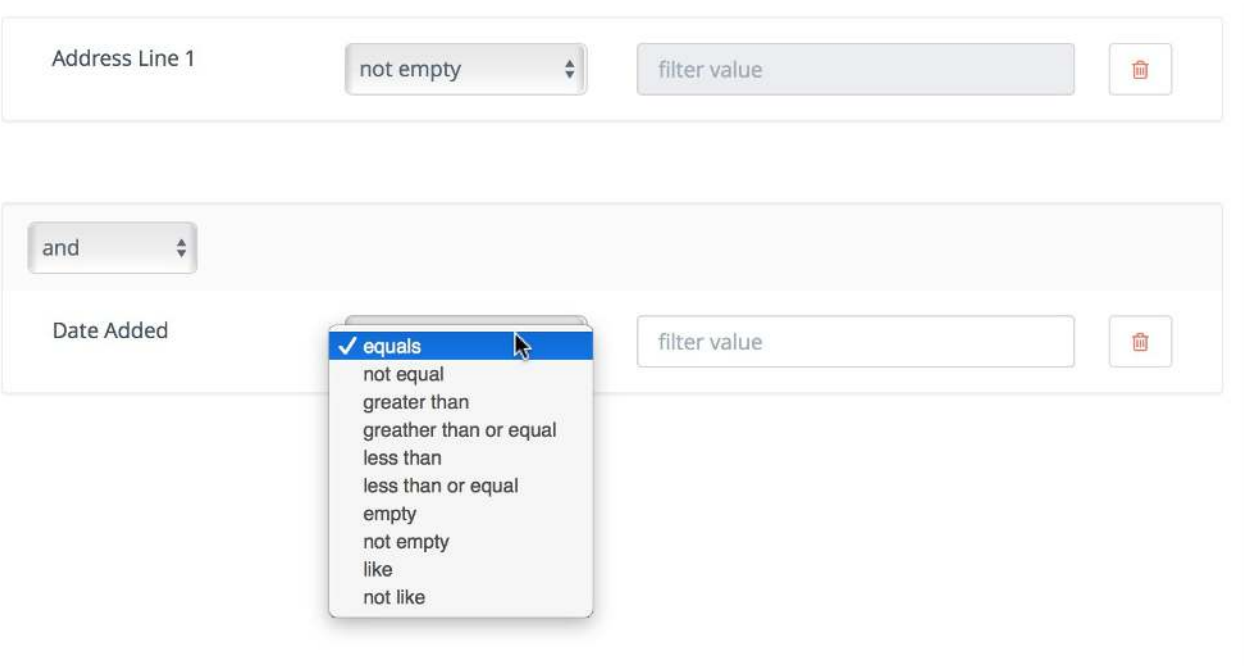
Segment Filters



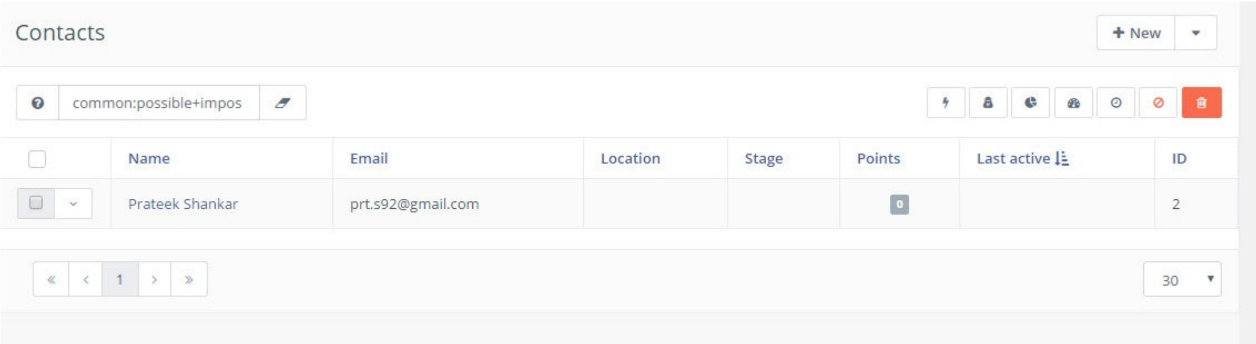
In addition, these filters can be combined to either be inclusive or exclusive depending on your needs.



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.



Matching part of a string

There are 5 filters you can use for matching part of a string - `starts with` , `ends with` , `contains` , `like` and `regexp` . First three filters match strings as you enter it. `like` filter is for advanced users - you can specify which type you want to use with `%` character:

- `My string%` is the same as `starts with` filter with `My string` value.
- `%My string` is the same as `ends with` filter with `My string` value.
- `%My string%` is the same as `contains` filter with `My string` value.
- `My string` is the same as `contains` filter with `My string` value.

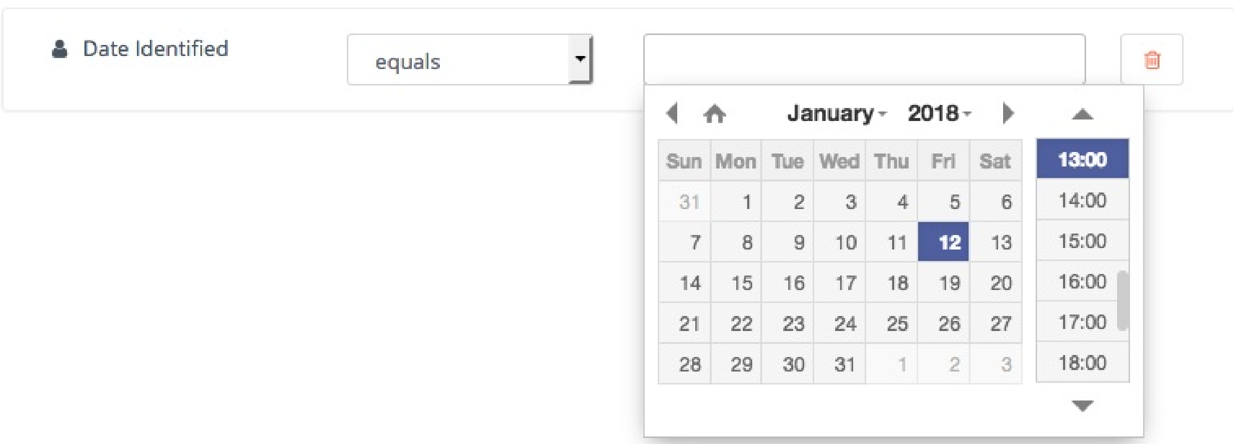
A few notes for text filters:

- `starts with` , `ends with` , `contains` filters were added later than the `like` one, so you can easily specify what you need now.
- `%` character in the middle of the string has no special meaning. `contains` filter with `my % string` will search for a string with `%` in the middle. The same is true for `like` filter with `%my % string%` value. There is no need for escaping this character.
- Mautic searches for `%` character in a value for `like` filter and no modification is performed if at least 1 `%` is found.

You can use regular expressions in a `regexp` filter. Mautic recognises all common operators like `|` for OR (`first string|second string`), character sets (`[0-9]` , `[a-z0-9]` etc.), repetitions (`+` , `*` , `?`) and more. You have to escape special characters with `\` if you want to use them as matching character. [Learn more about regex at https://dev.mysql.com/doc/refman/5.7/en/regexp.html](https://dev.mysql.com/doc/refman/5.7/en/regexp.html). Please note that MySQL (and Mautic) uses POSIX regex, which could behave differently from other types of Regex.

Date options

Date filters allow you to choose a date via DatePicker:



Hovewer you can specify much more here. Mautic recognizes relative formats too (these string are not translatable):

- `+1 day` (you can also use `1 day`)
- `-2 days` (you can also use `2 days ago`)
- `+1 week` / `-2 weeks` / `3 weeks ago`
- `+5 months` / `-6 months` / `7months ago`
- `+1 year` / `-2 years` / `3 years ago`

Example (Consider that today is `2018-03-02`):

- `Date identified equals -1 week` returns all contacts identified on 2018-02-23.
- `Date identified less than -1 week` returns all contacts identified before 2018-02-23.
- `Date identified equals -1 months` returns all contacts identified on 2018-02-02.
- `Date identified greater or equal -1 year` returns all contacts identified 2017-03-02 and after.
- `Date identified greater than -1 year` returns all contacts identified after 2017-03-02.

Beside this you can specify your date with text. These formulas are **translatable**, so make sure you use them in correct format.

- `birthday` / `anniversary`
- `birthday -7 days` / `anniversary -7 days`
- `today` / `tomorrow` / `yesterday`
- `this week` / `last week` / `next week`
- `this month` / `last month` / `next month`
- `this year` / `last year` / `next year`

Example (Consider that today is `2018-03-02`):

- `Date identified equals last week` returns all contacts identified between 2018-02-26 and 2018-03-04 (Monday to Sunday).
- `Date identified less than last week` returns all contacts identified before 2018-02-19.
- `Date identified equals last month` returns all contacts identified between 2018-02-01 and 2018-02-28.
- `Date identified greater or equal last year` returns all contacts identified 2017-01-01 and after.
- `Date identified greater than last year` returns all contacts identified after 2017-12-31.
- `Custom contact date field equal birthday -1 day` returns all contacts identified every year on 03-01 (1st march).
- `Custom contact date field equal anniversary -1 month` returns all contacts identified every year on 02-01 (1st february)

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
```

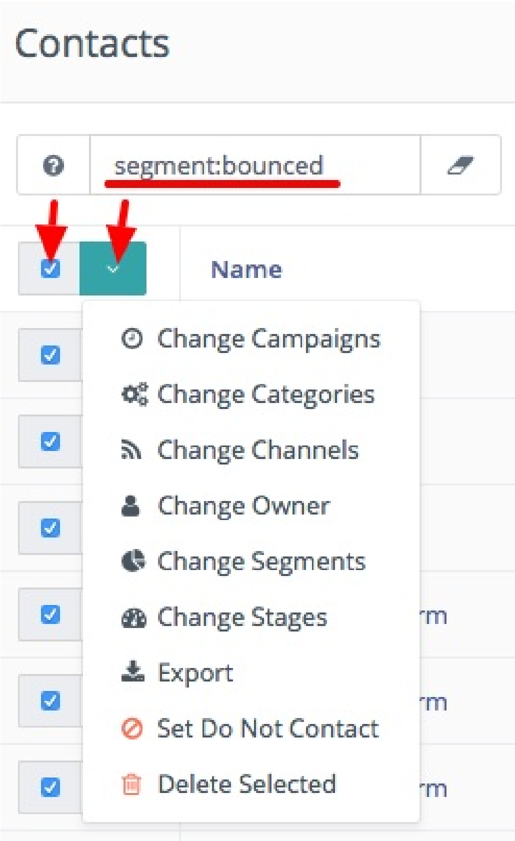
Through the execution of that command, contacts that match the filters will be added and contacts that no longer match will be removed. Any contacts that were manually added will remain part of the list regardless of filters.

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

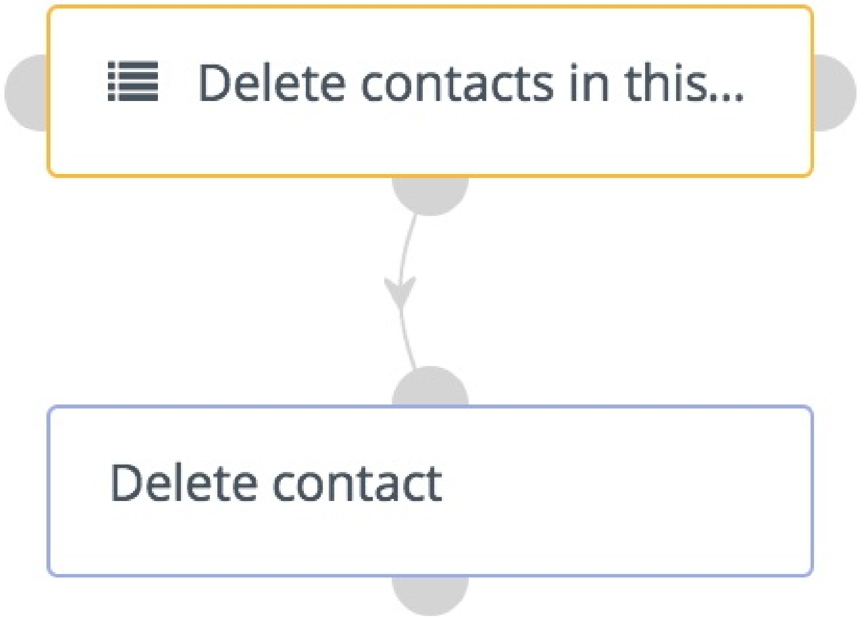
Filter the contacts in the segment. The batch delete action in the contact table allows deletion of up to 100 contacts at one time. This is a performance precaution since deleting more contacts at one time could cause issues. This feature can be used for hundreds of contacts.



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.

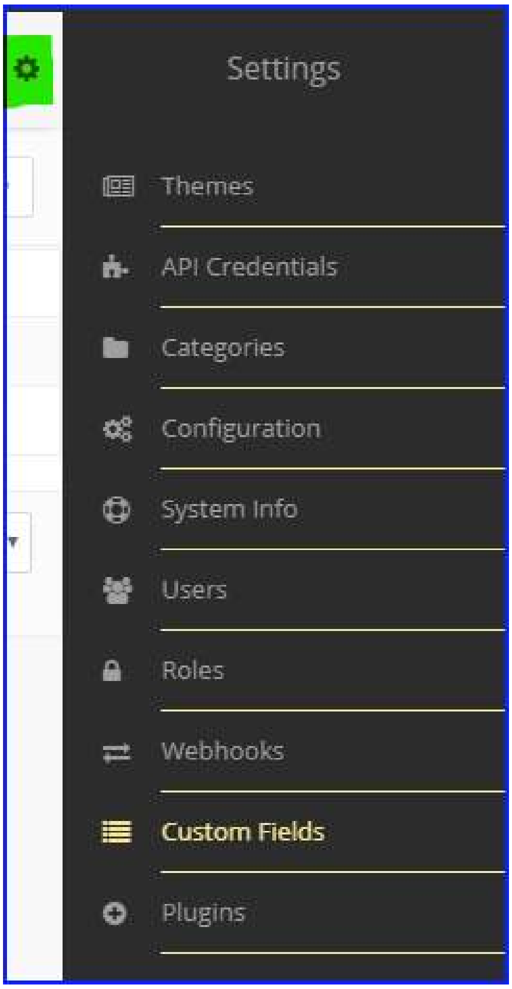
1. Create a simple campaign which has the segment as the source \
2. Use the Delete contact action.

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

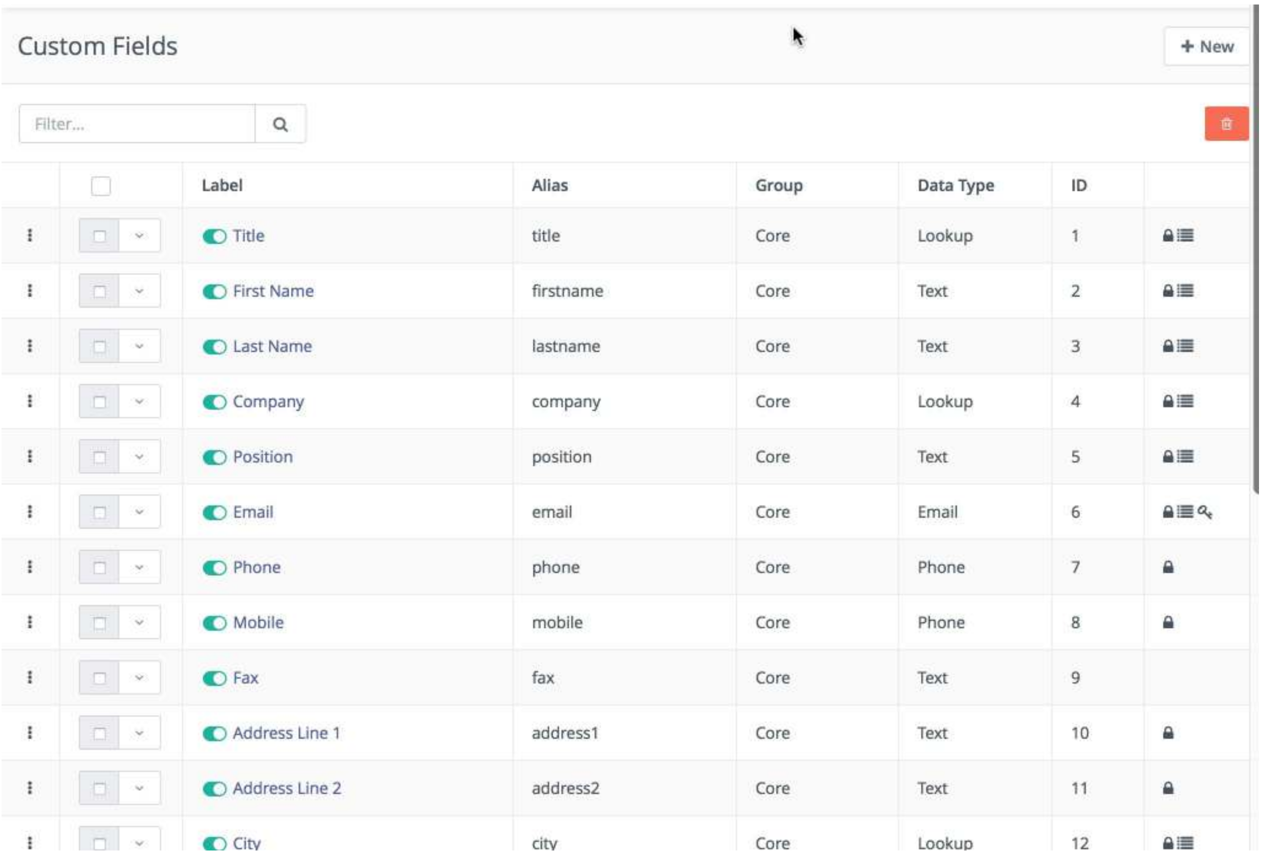
Manage Custom Fields

You can manage Custom Fields through the *Admin* menu (click the cogwheel upper right hand side of Mautic).



Custom Fields

The *Custom Fields* page will let you view all existing Contact fields as well as any custom contact fields you have created.



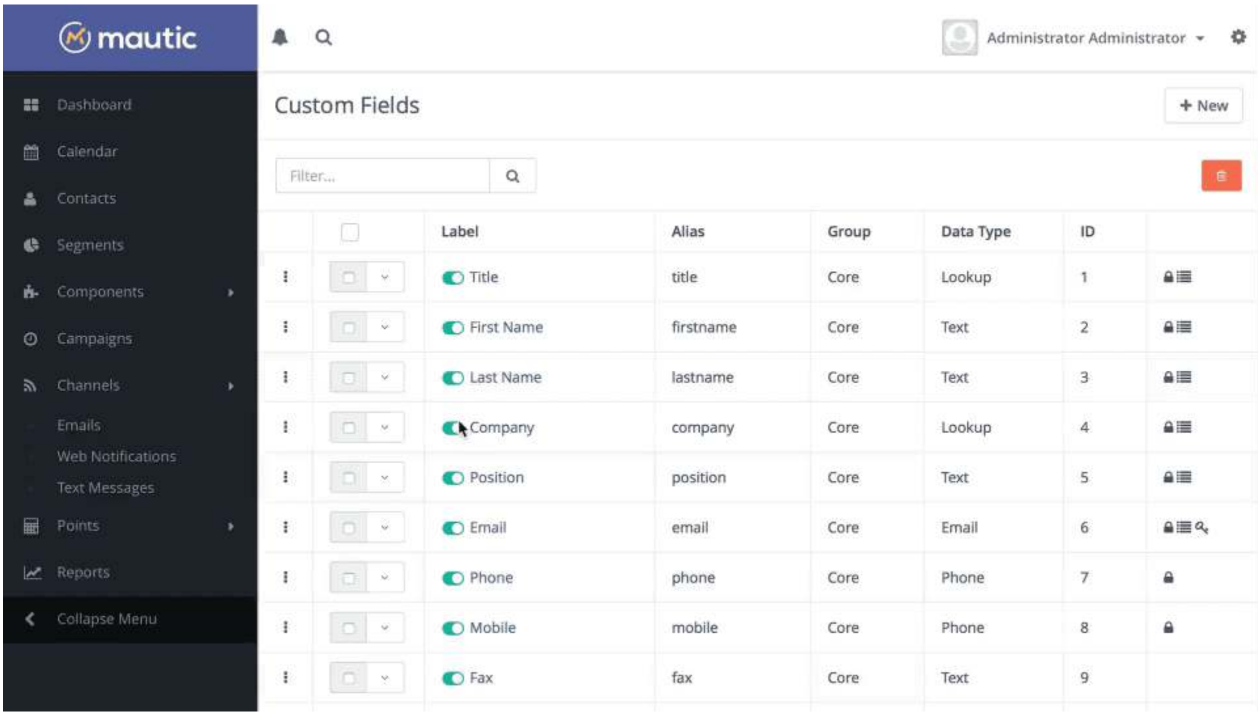
Label	Alias	Group	Data Type	ID
Title	title	Core	Lookup	1
First Name	firstname	Core	Text	2
Last Name	lastname	Core	Text	3
Company	company	Core	Lookup	4
Position	position	Core	Text	5
Email	email	Core	Email	6
Phone	phone	Core	Phone	7
Mobile	mobile	Core	Phone	8
Fax	fax	Core	Text	9
Address Line 1	address1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

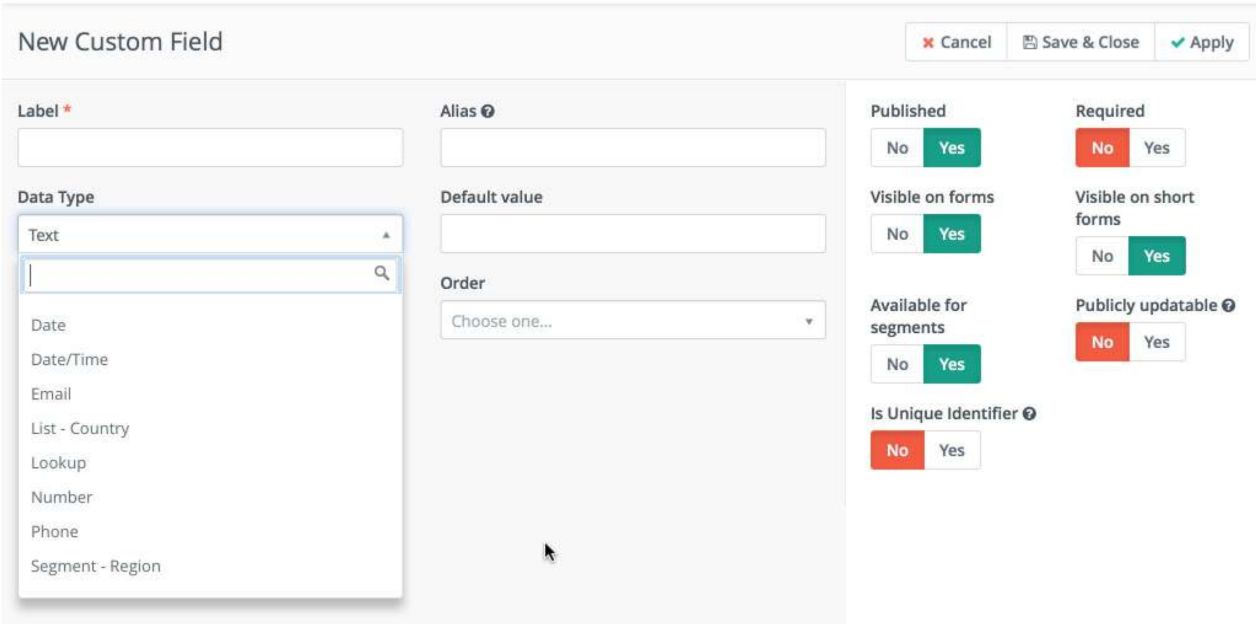
Published Fields

There is a toggle switch which shows before each label title.\ This type of switch is used throughout the Mautic UI to publish and unpublish items.



Adding A 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

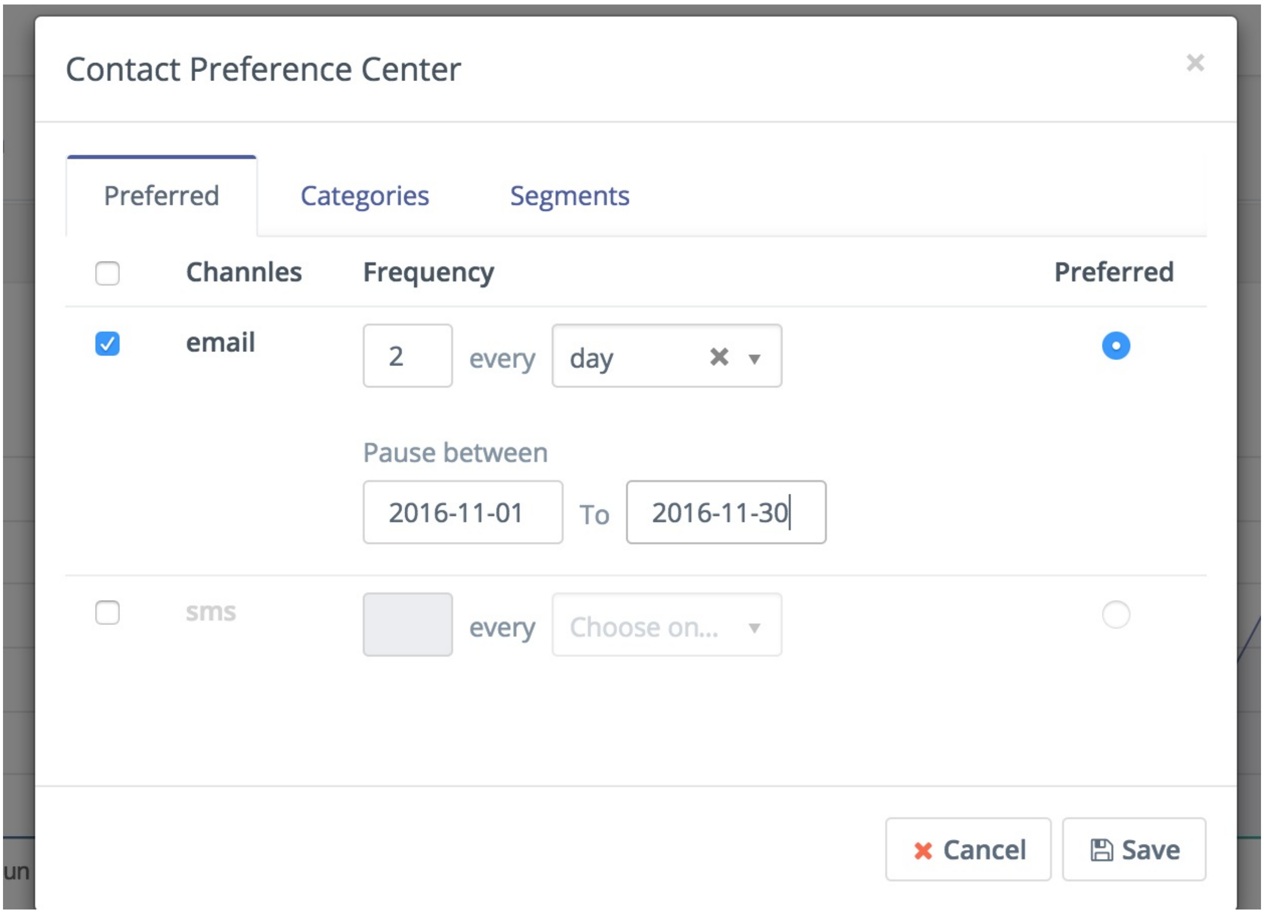
- Frequency rules can be set globally from the configuration panel on both the email and sms settings.

- 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

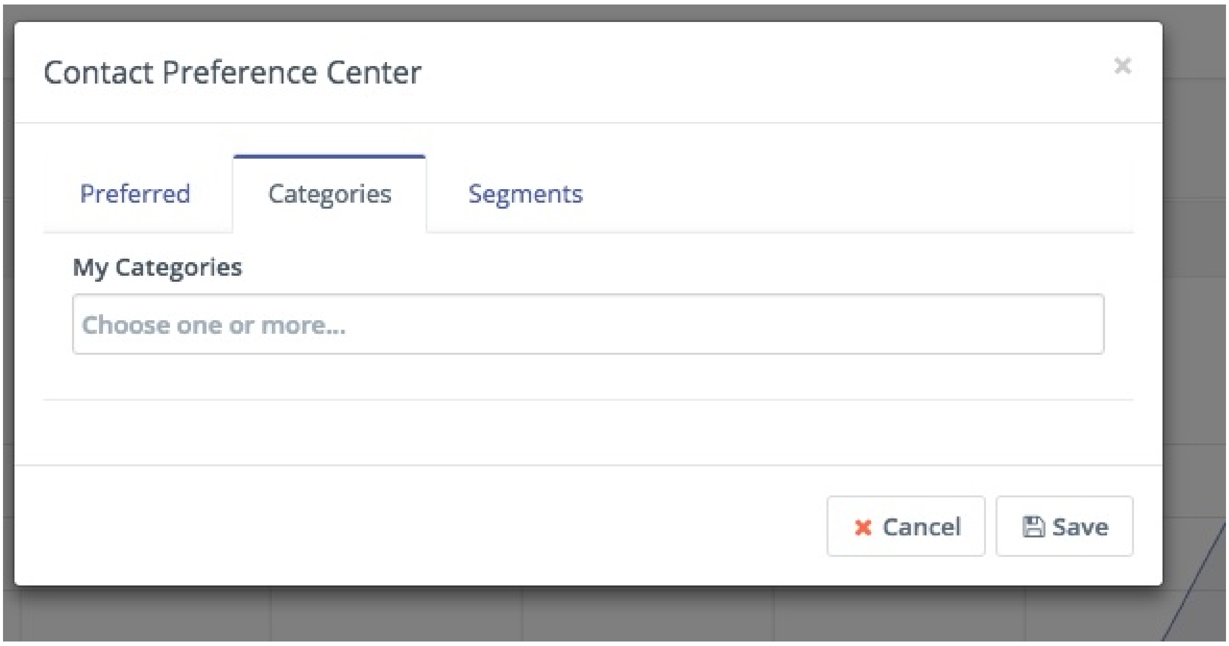


In this window you can enable/disable channels of communication, set the frequency of the communication via each channel enabled, and set one of the channels as a preferred channel.

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.

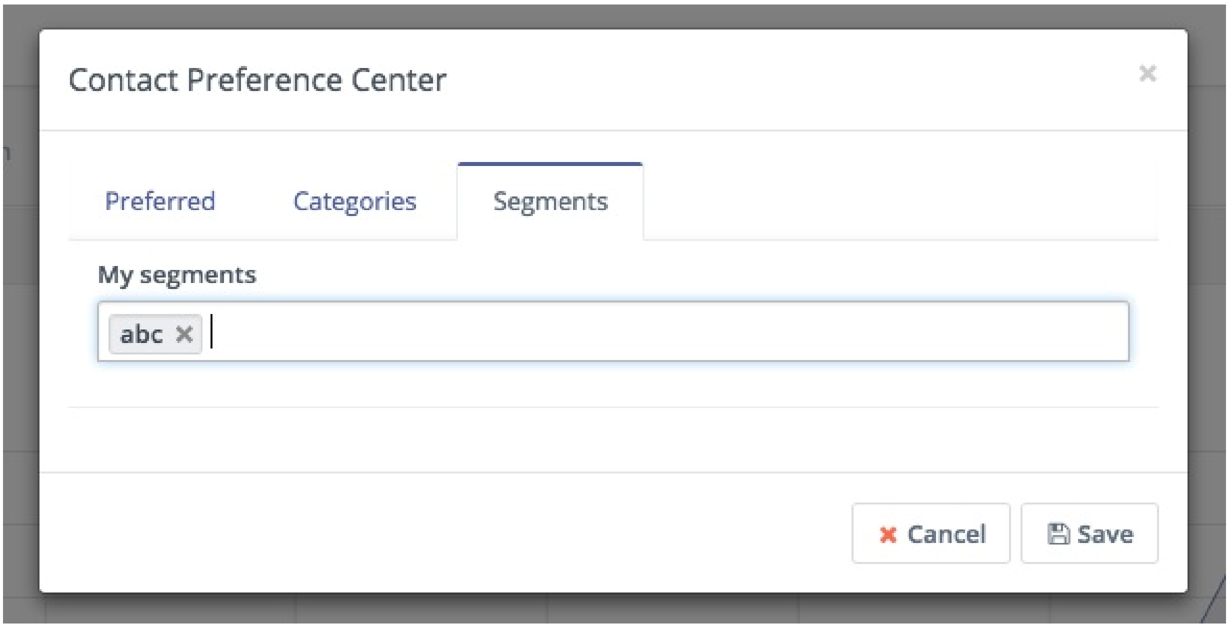
When a channel is selected, these will be used to send marketing messages if there is a message set for any of the channels selected. You can also set the frequency of the communication, as in this example the frequency is set to "Send me emails twice a day" but pause them during the "1st of november 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



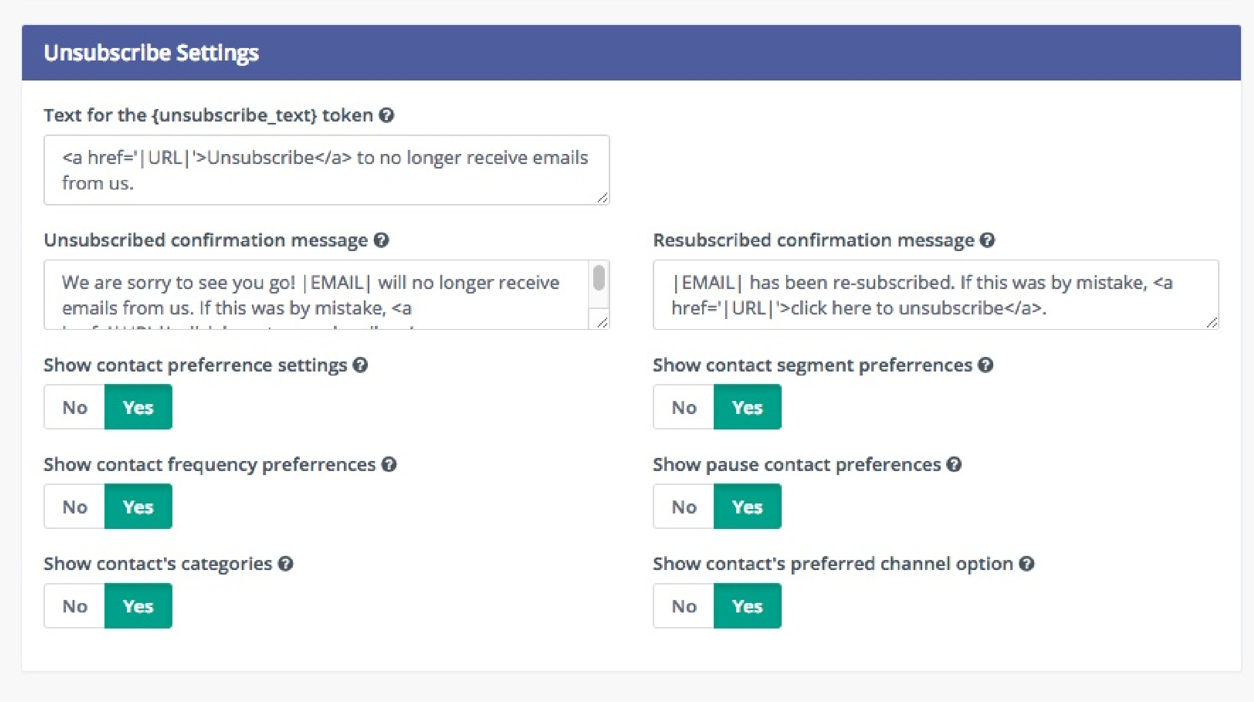
Use the categories tab to add or remove a contact from a global category. Global categories can be used in areas like emails, text messages, campaigns. In combination with the new Subscribed Categories segment filter, contacts can be given the choice to opt out of categorized communications.

Contact Segments

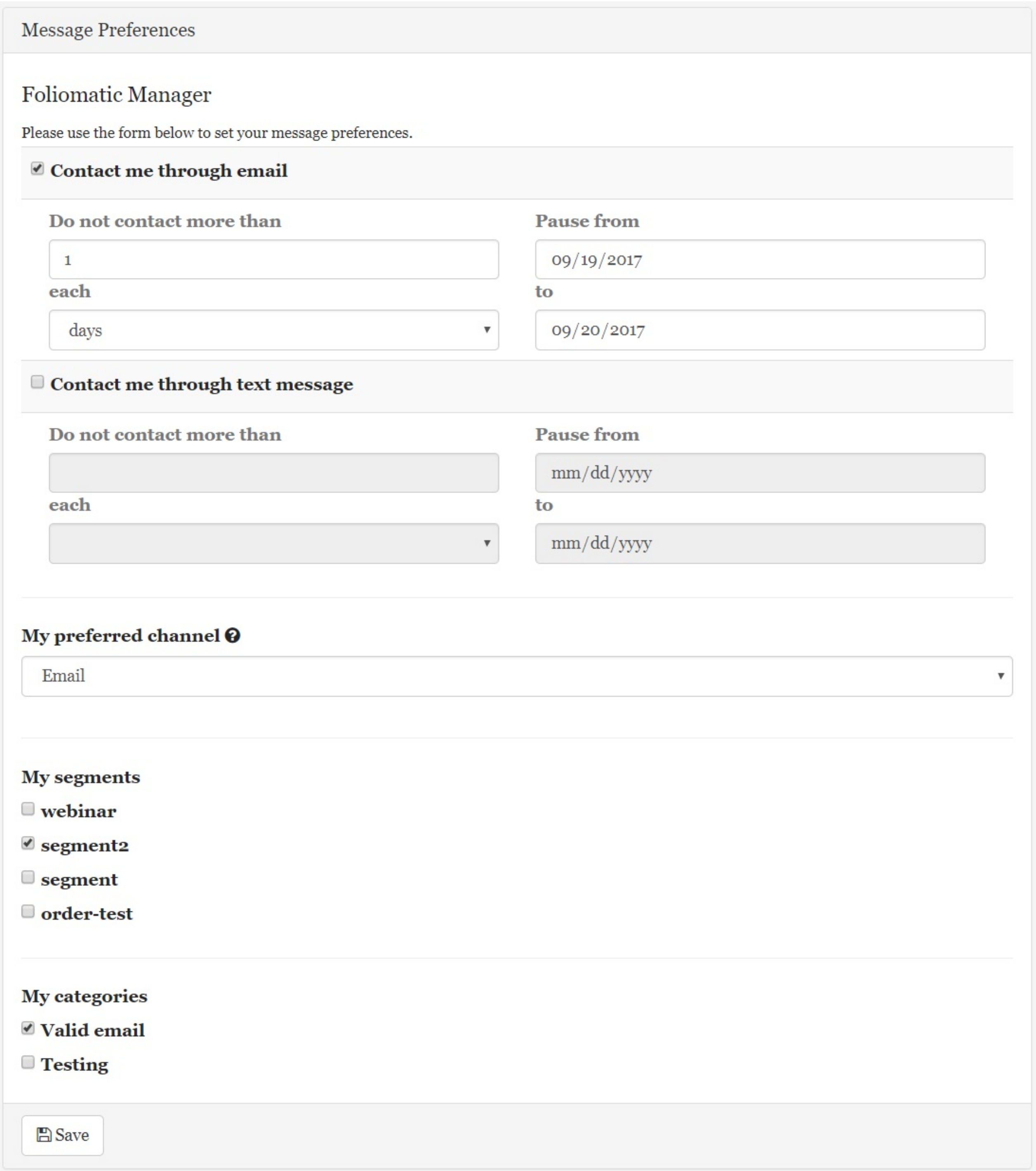


Use the segments tab to add or remove a contact from a segment. Segments are used as a source for campaigns and emails. Any contact in a particular segment will be part of a campaign that has that segment as the source. You can also use a standalone email manually to a segment. If a user has opted out 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.



You can also [Customize the preference center page for individual emails]

Customize Preference Center

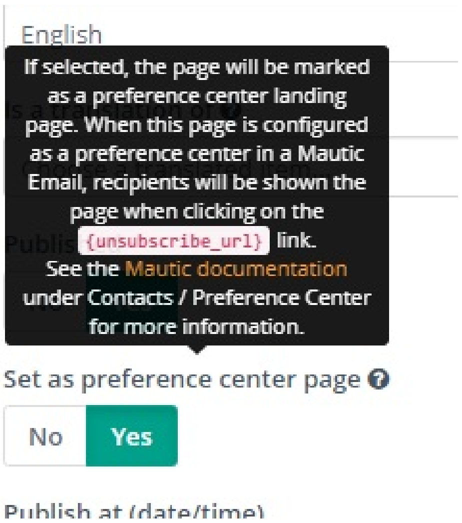
It is possible to customize the personal Preference Center/unsubscribe page and edit text labels, format and apply themes using the landing page builder.

Creating a Preference Center Landing Page

When creating/editing a landing page, there is a toggle switch labeled *Is Preference Center*. If selected, the page will be marked as a preference center landing page.

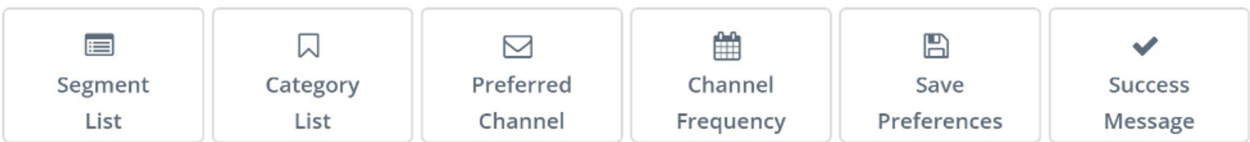
> **Note**
>
> When PR#7915 is merged it will be labeled *Set as preference center page*

When this page is configured as a preference center in a Mautic Email, recipients will be shown the page when clicking on the `{unsubscribe_url}` link. It also shows or hides the Preference Center slots in the builder.



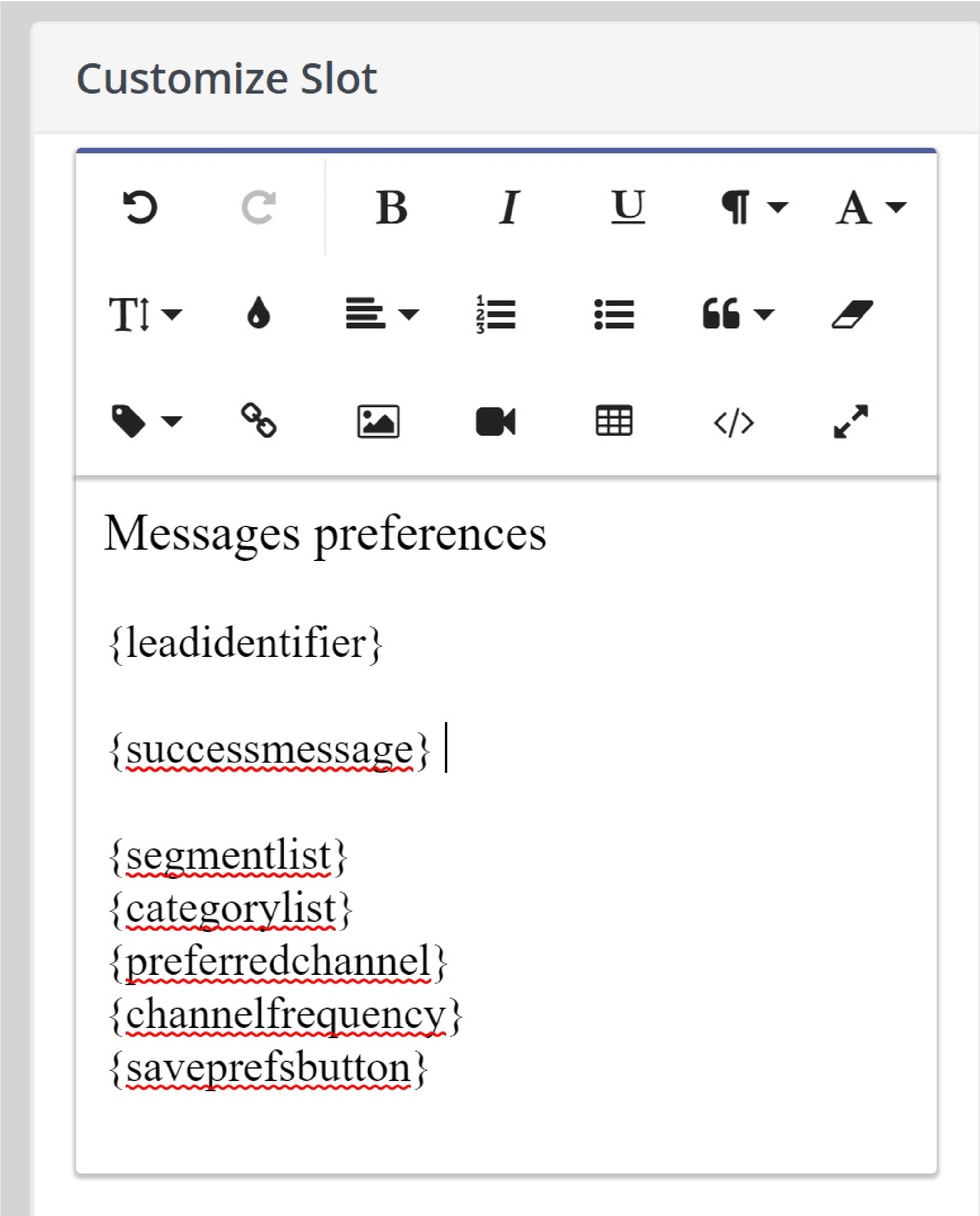
Builder slots

These slots in the builder are used to customize the page:



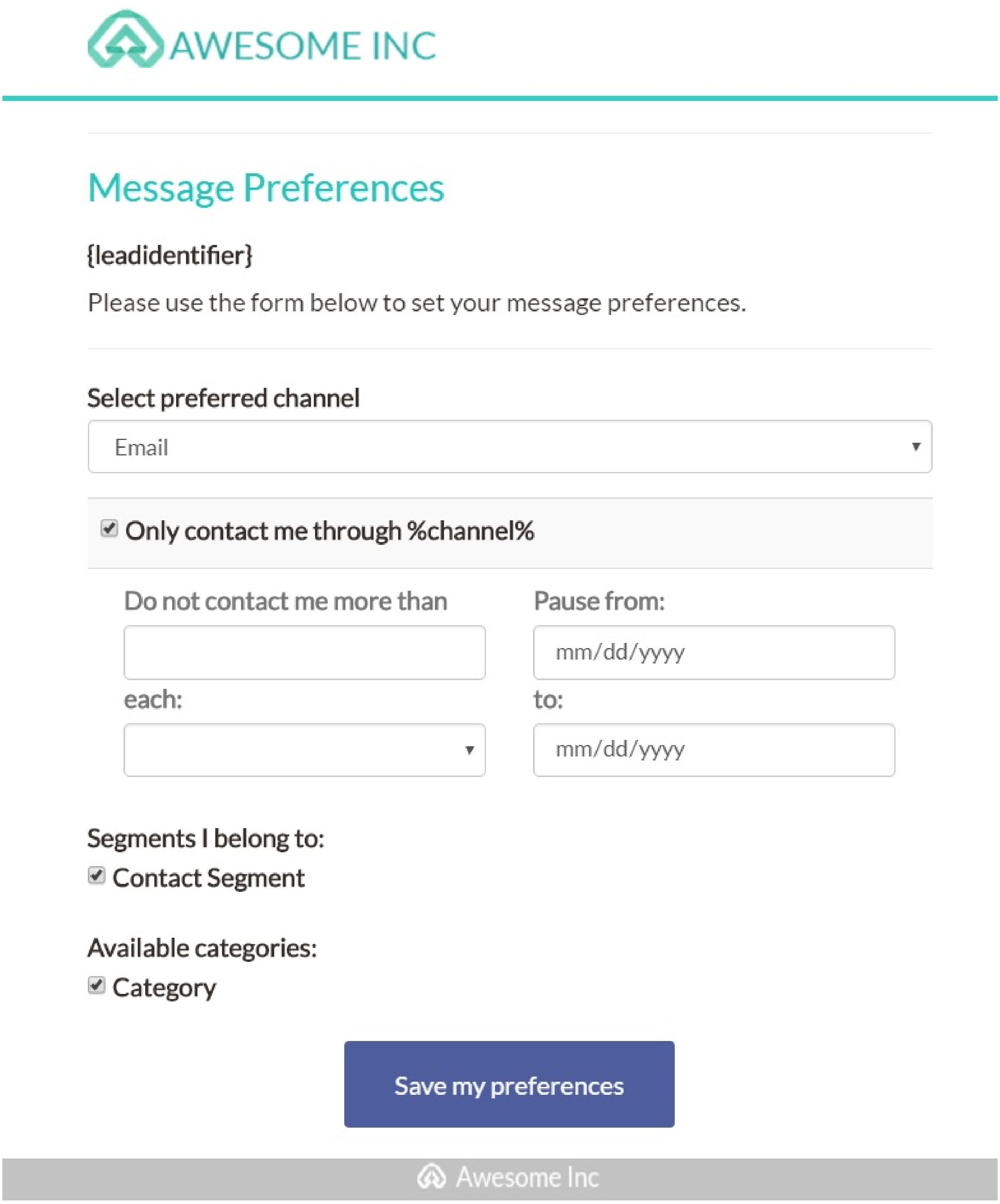
Tokens

Optionally, you can use tokens to insert the different slots. Keep in mind that if you use tokens, you lose the ability to customize the labels and styles of the slots because it uses the default ones.



See the VARIABLES page for a full list of tokens.

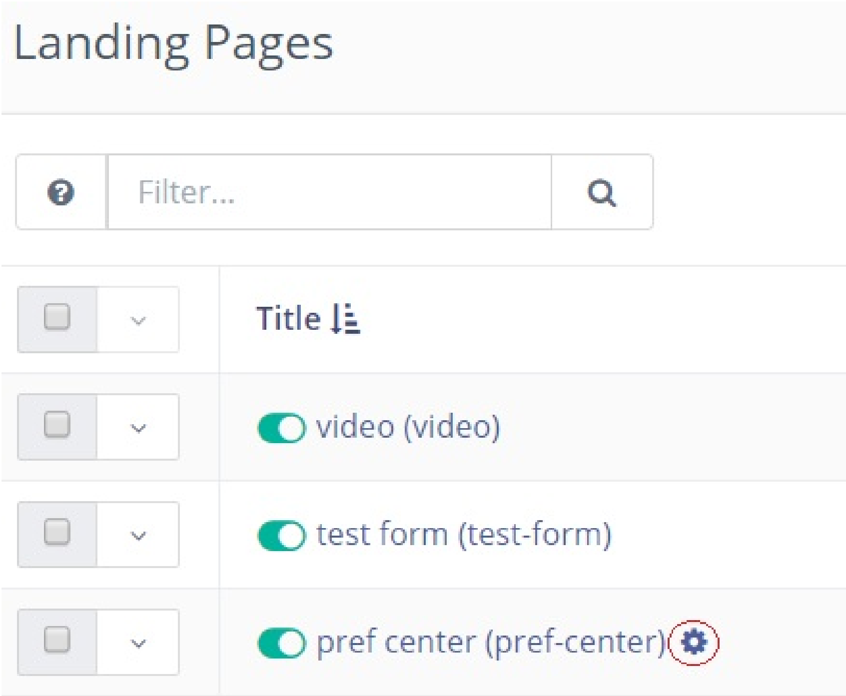
To finish, don't forget to include a "save preferences" button, otherwise the preferences can't be saved:



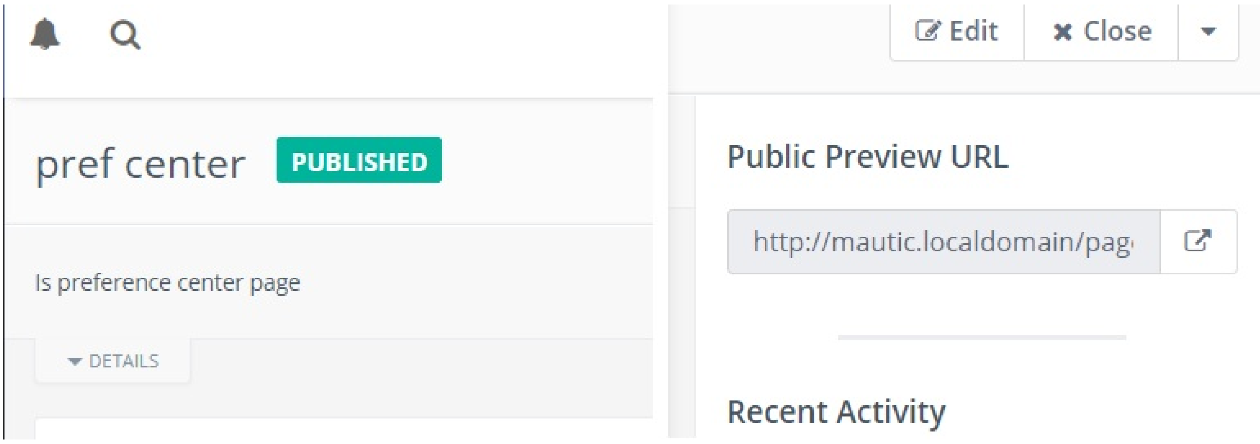
Save the page and the Preference Center landing page is ready.

Landing Pages

Now in the landing pages list, the icon with the little cog indicates that the page is a Preference Center one.

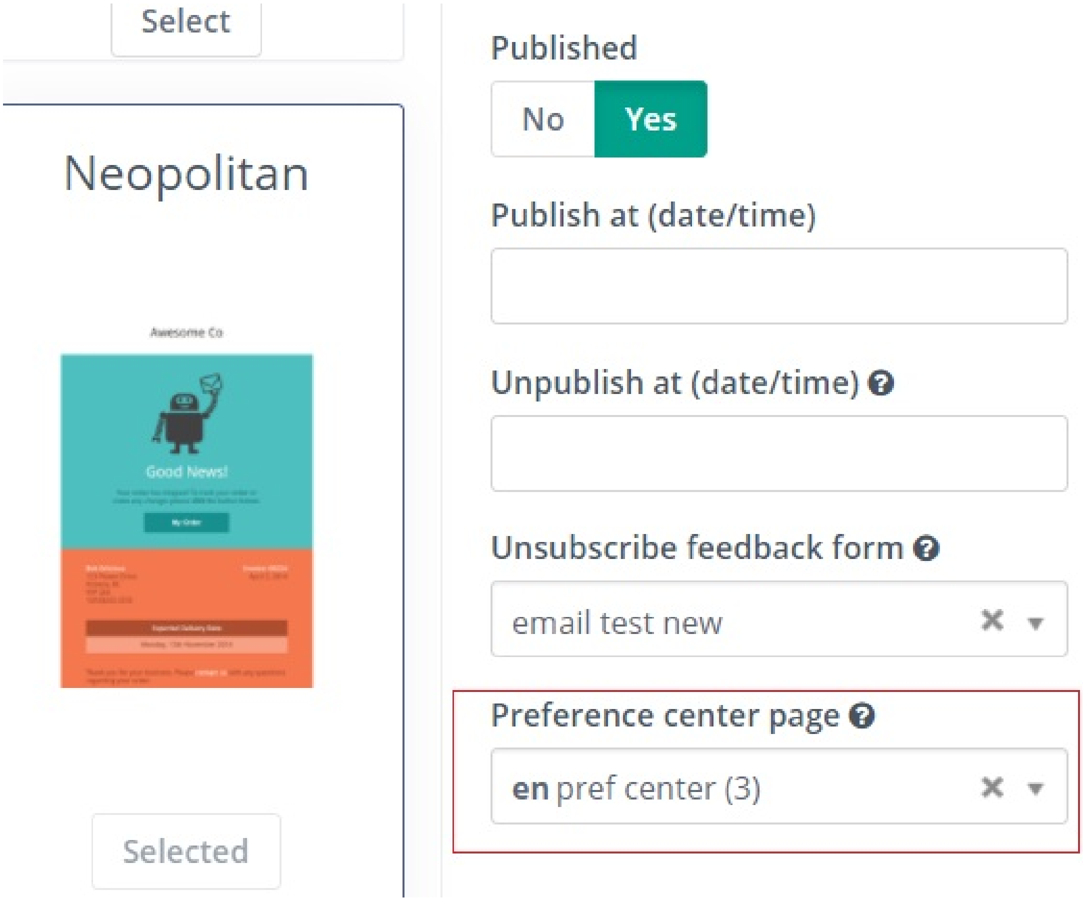


When viewing a Preference Center page, there is a header indicating its purpose and the page URL is not available, only the preview URL.



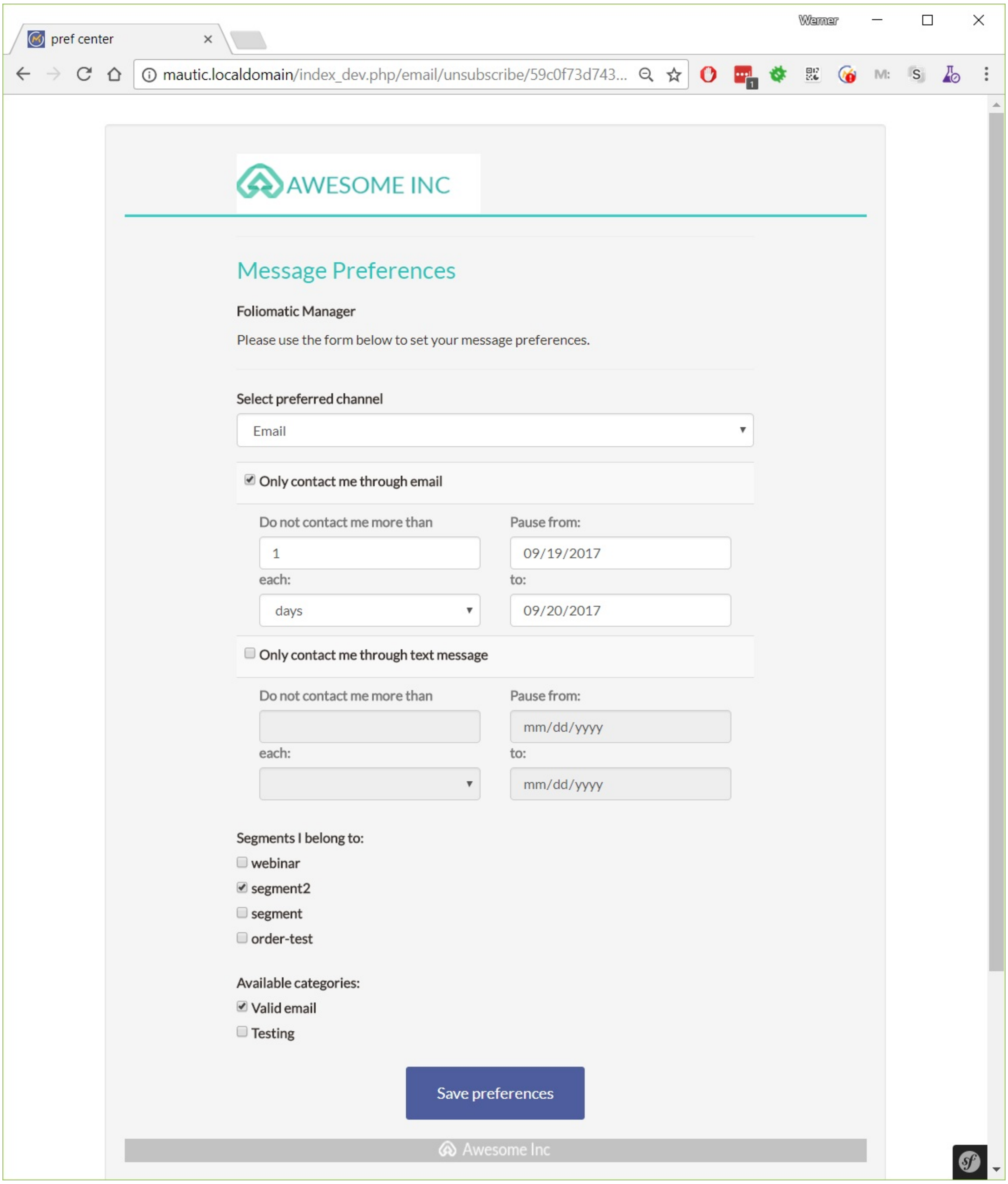
Setting Preference Center Pages in Emails

When creating or editing an email, you can select the Preference Center page from the list as shown:

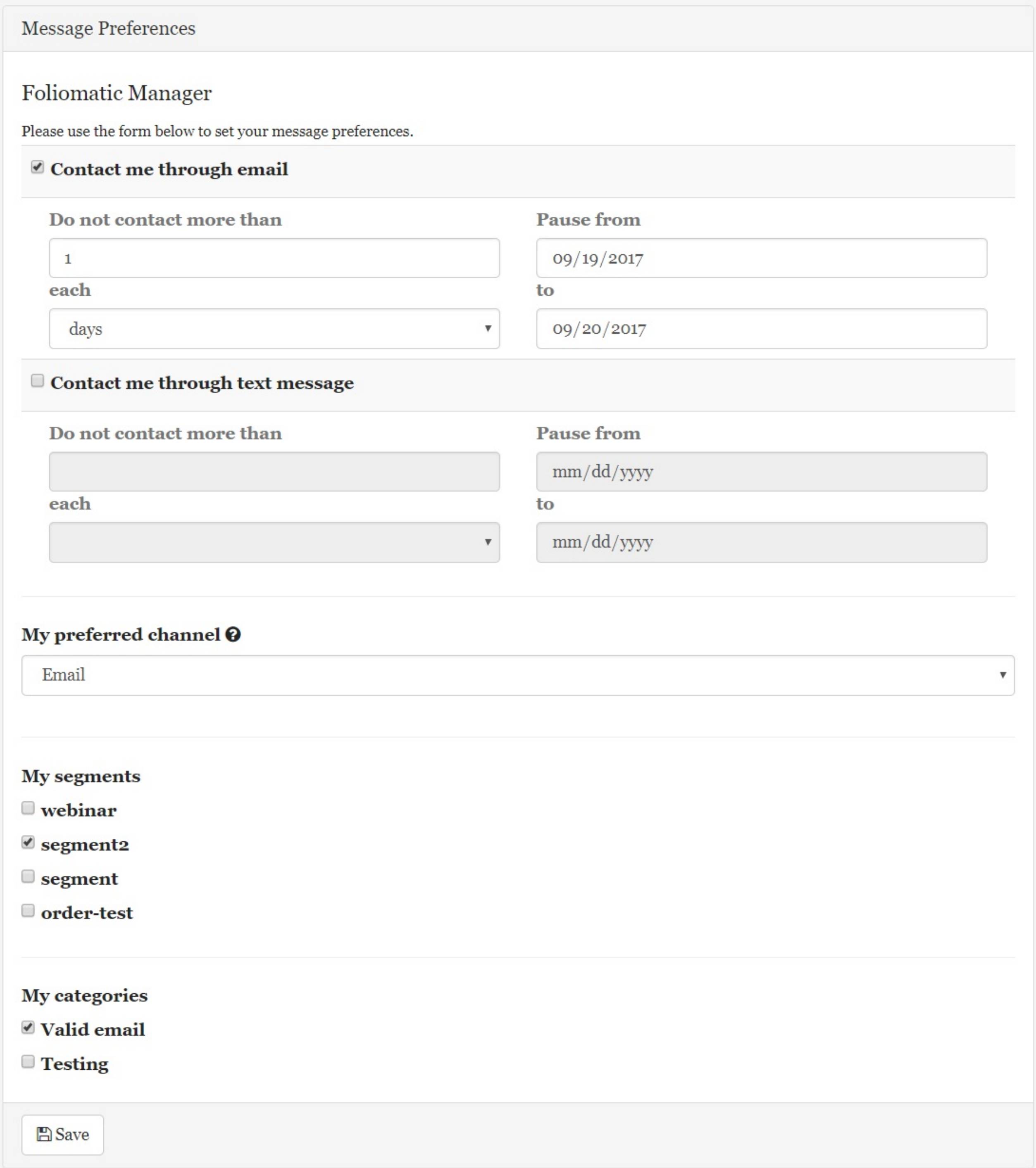


Keep in mind that your mail must use the same langugage as the Preference Center landing page - if not, default Preference Center will be shown.

Now when the email is sent, all recipients will be able to click on the Unsubscribe link (`{unsubscribe_text}` and `{unsubscribe_url}`) and the new Preference Center page will be displayed.



If no Preference Center page is selected in an email, the default page is displayed.

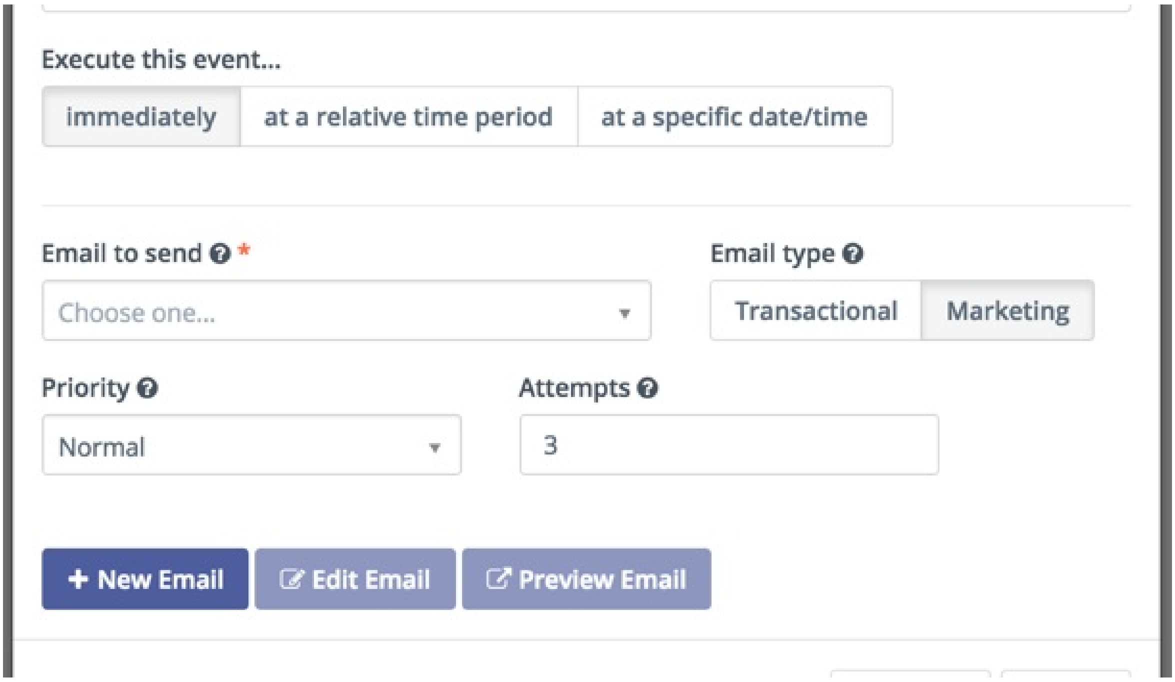


Message Preferences
Foliomatic Manager
Please use the form below to set your message preferences.
Contact me through email
Do not contact more than
1
each
days
Pause from
09/19/2017
to
09/20/2017
Contact me through text message
Do not contact more than
each
Pause from
mm/dd/yyyy
to
mm/dd/yyyy
My preferred channel
Email
My segments
webinar
segment2
segment
order-test
My categories
Valid email
Testing
Save

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).

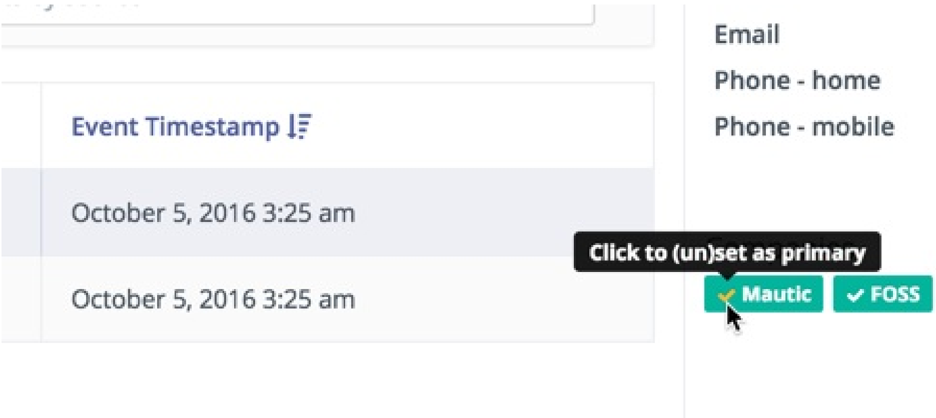
Company Scoring

A companies 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

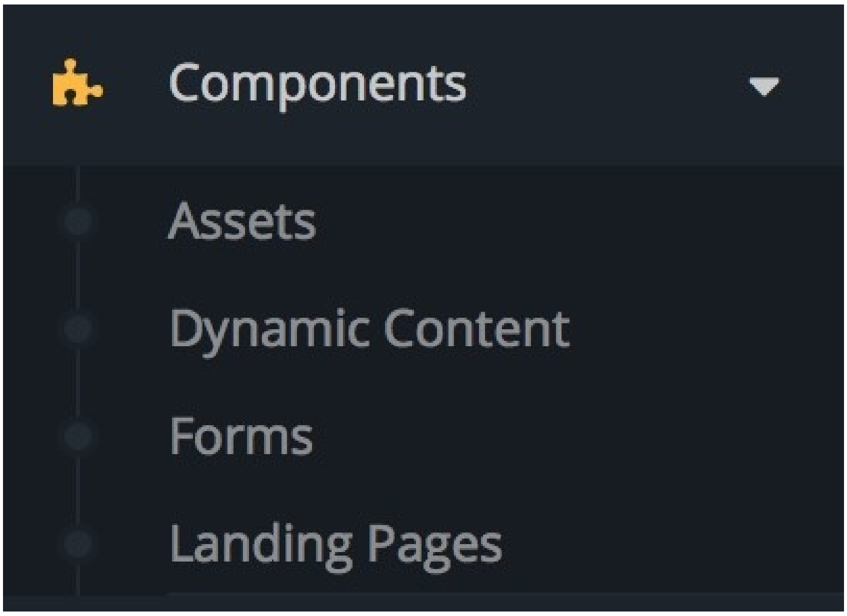
As of Mautic 2.3.0, it is now possible to set primary company through the Contact details page.



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

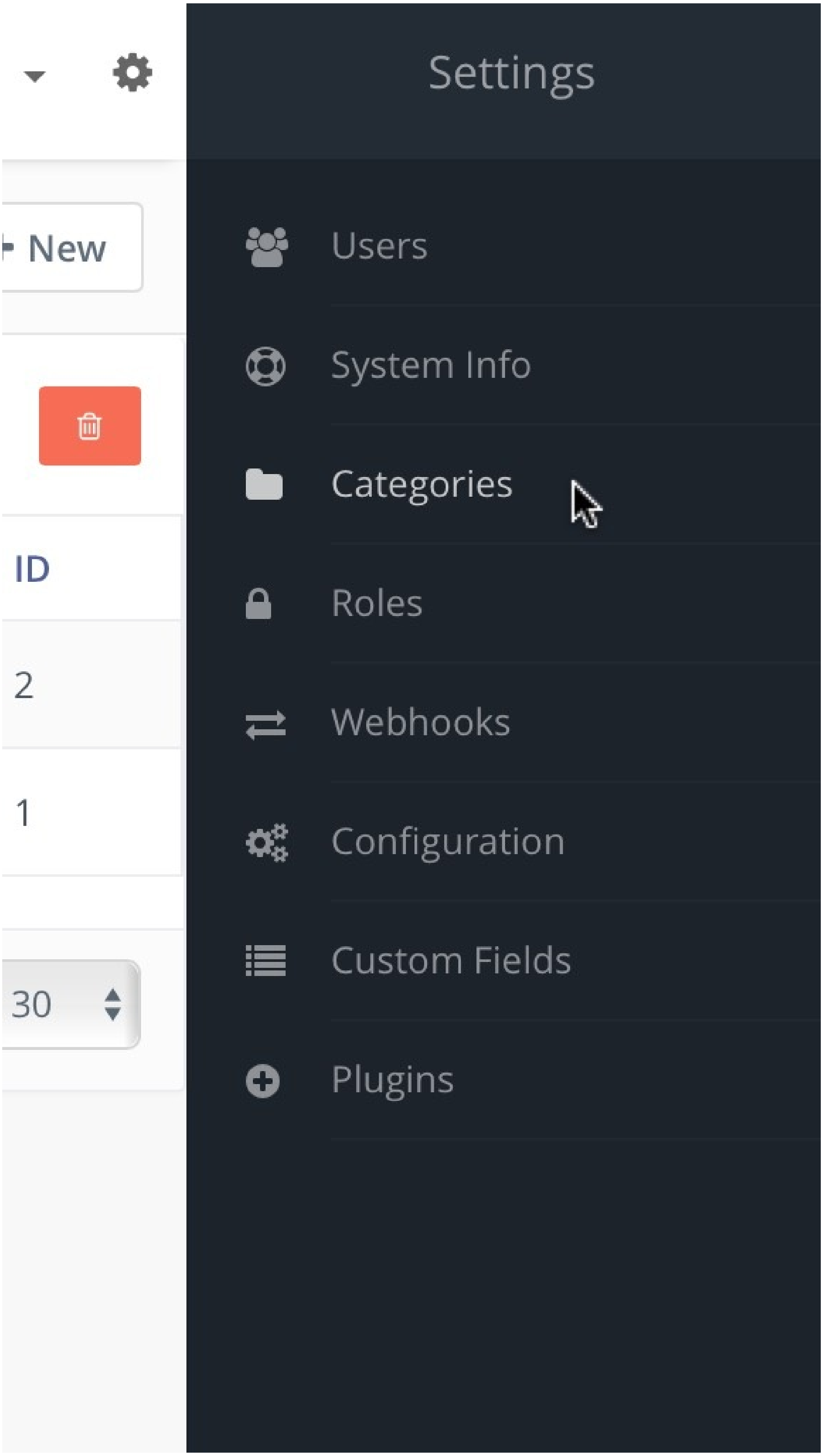
A few common examples of assets include:

- 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

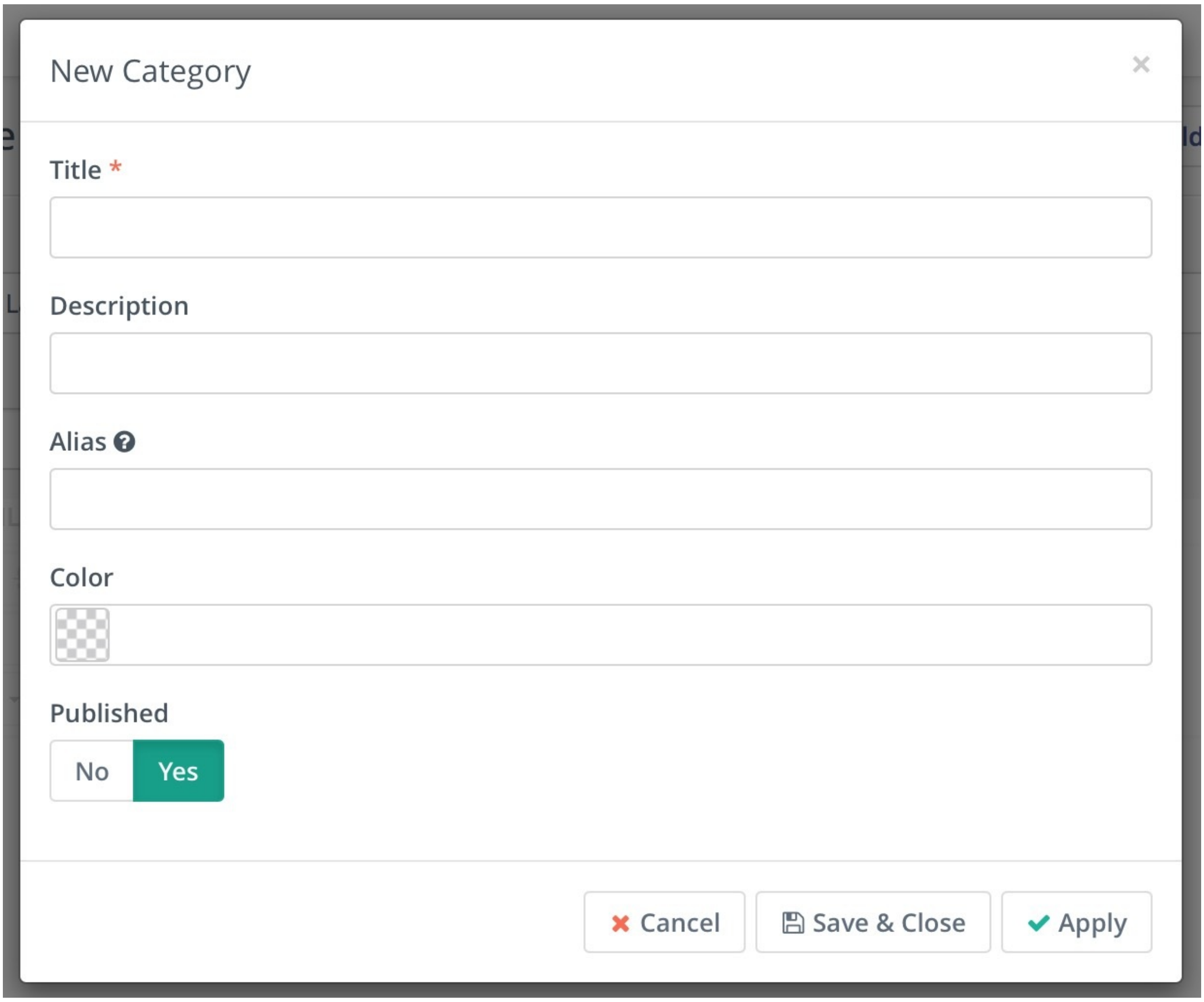
Categories

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.

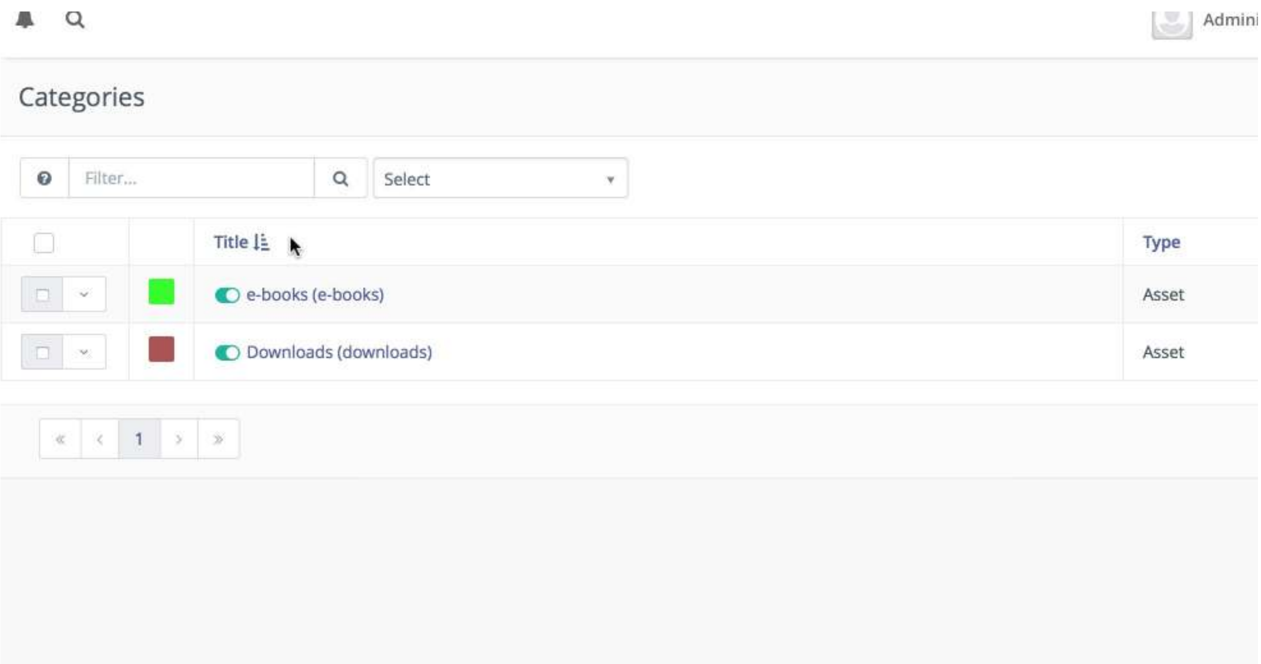
To save the changes and continue editing, press 'Apply'. To save the changes and go back to the categories screen, press 'Save & Close'. To cancel changes and return to the categories screen, press 'Cancel'

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

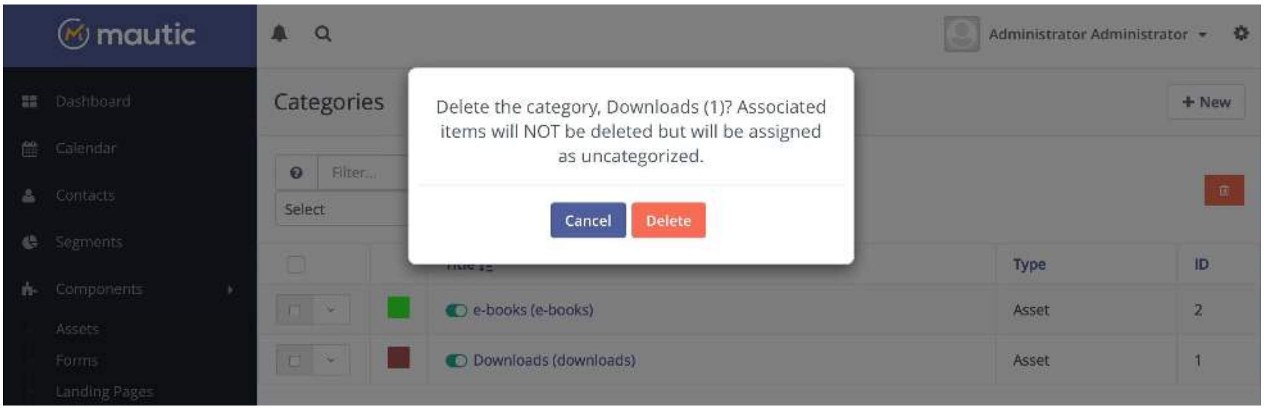
Categories can be sorted by title or ID. Click on the column header to search by the required field - clicking again will reverse the sort order.



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.

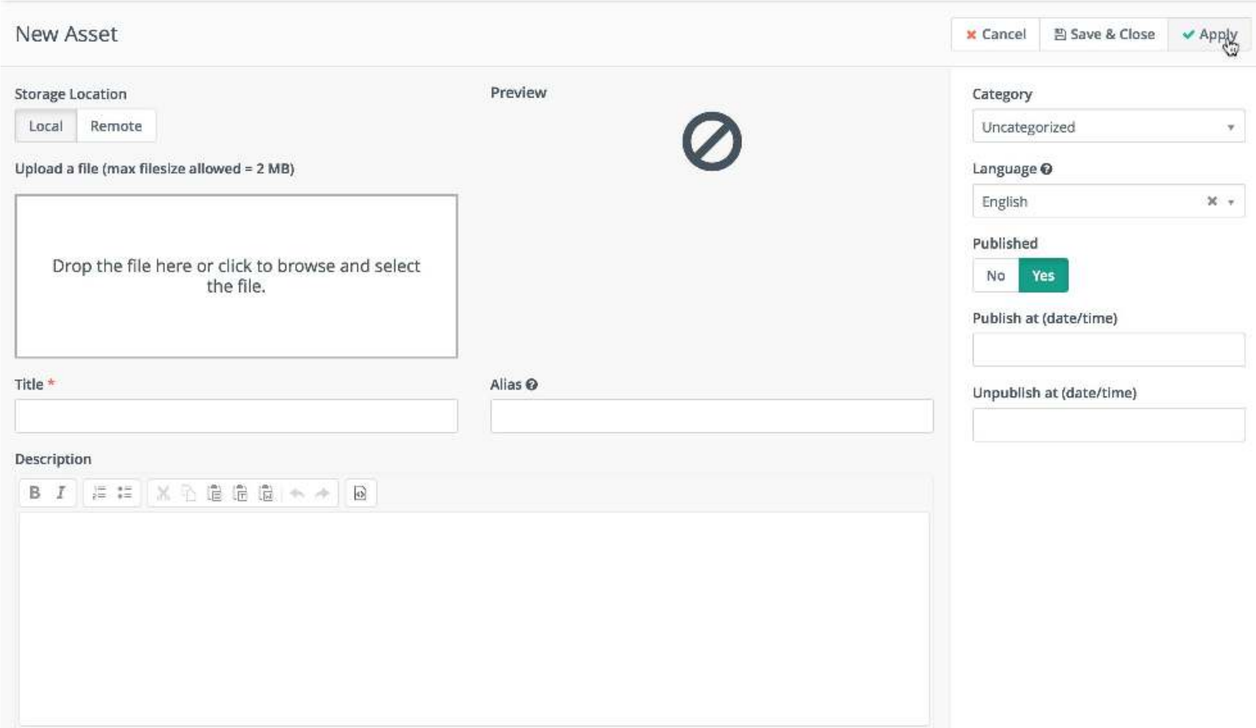


Assets

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.

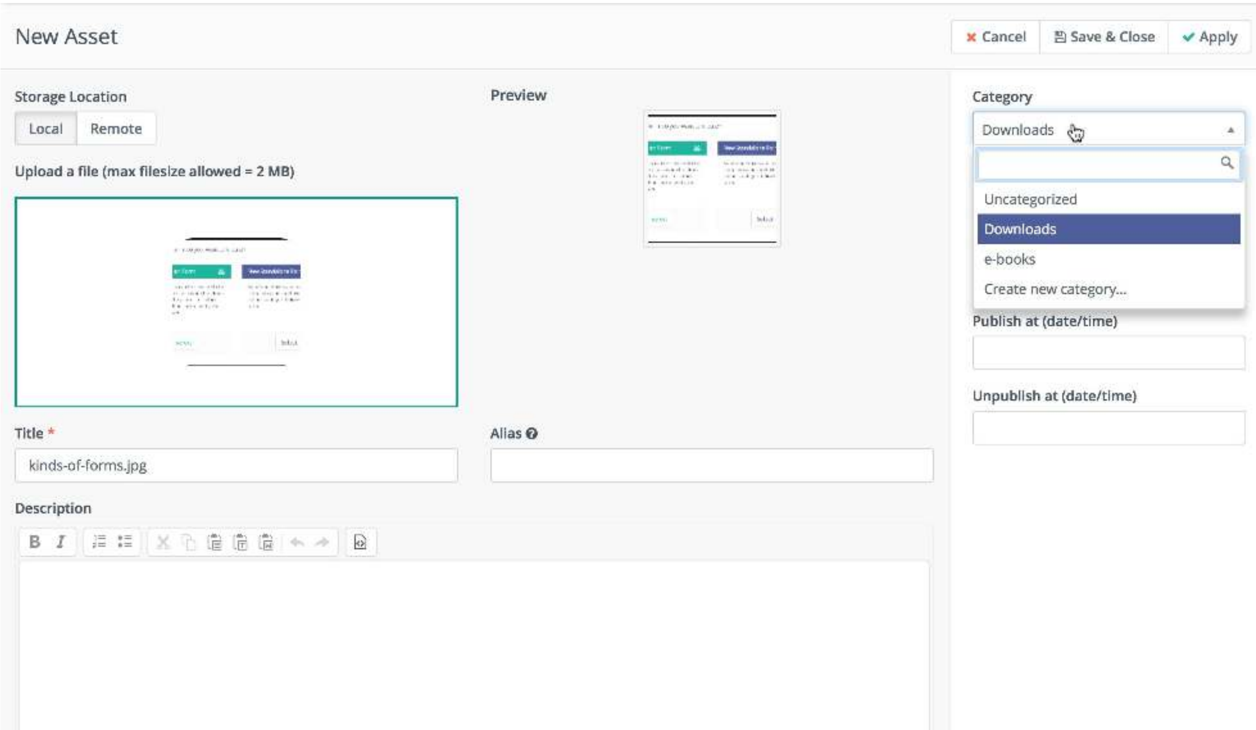
Navigate to 'Components' -> 'Assets', and click 'New' to begin creating an asset.



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.

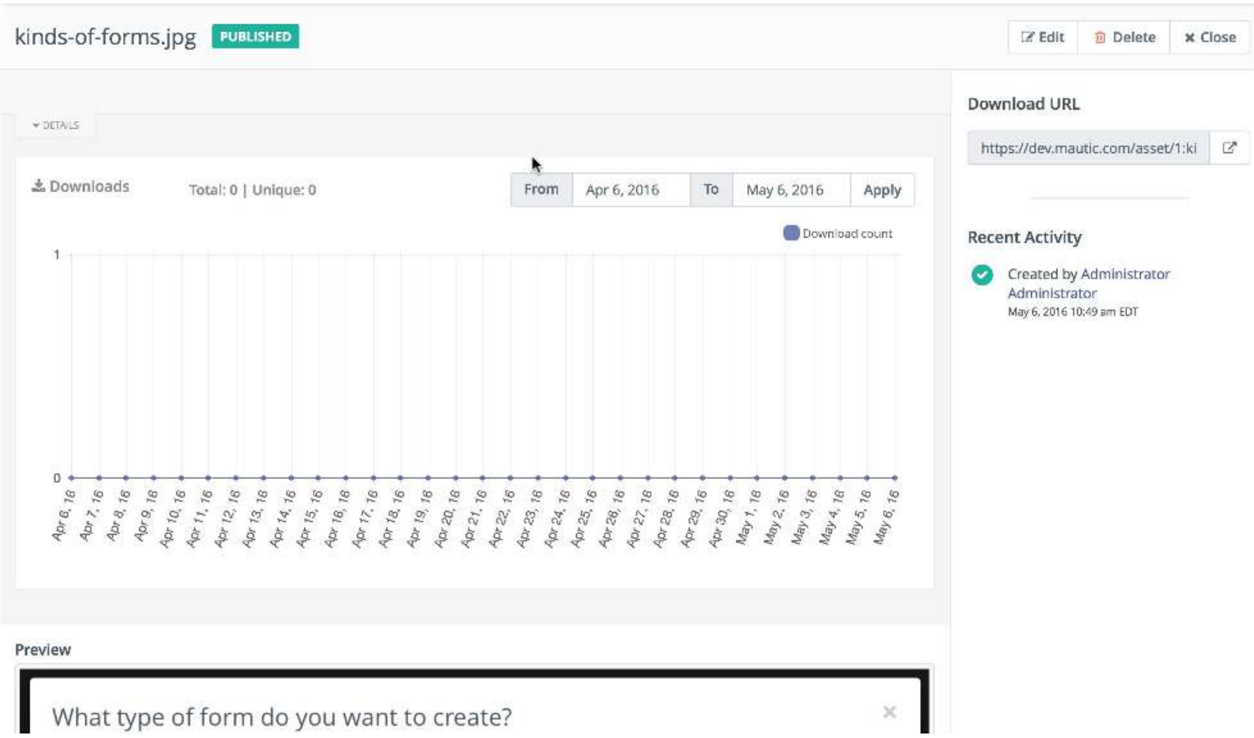


The title of the asset can be set, along with a description and an alias as above with categories. Assets can only be assigned to published categories, therefore the dropdown list for category selection will not feature unpublished categories. It is also possible to set the language, whether the asset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

Disable files from search engines (Google etc.)

Search engines crawl content of various files like PDF etc. If you don't want see your files in search results then enable option Not to index by search bots.

See Fetch as Google tool to validate, refresh index or remove already cached files from search.

Dynamic Web Content

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

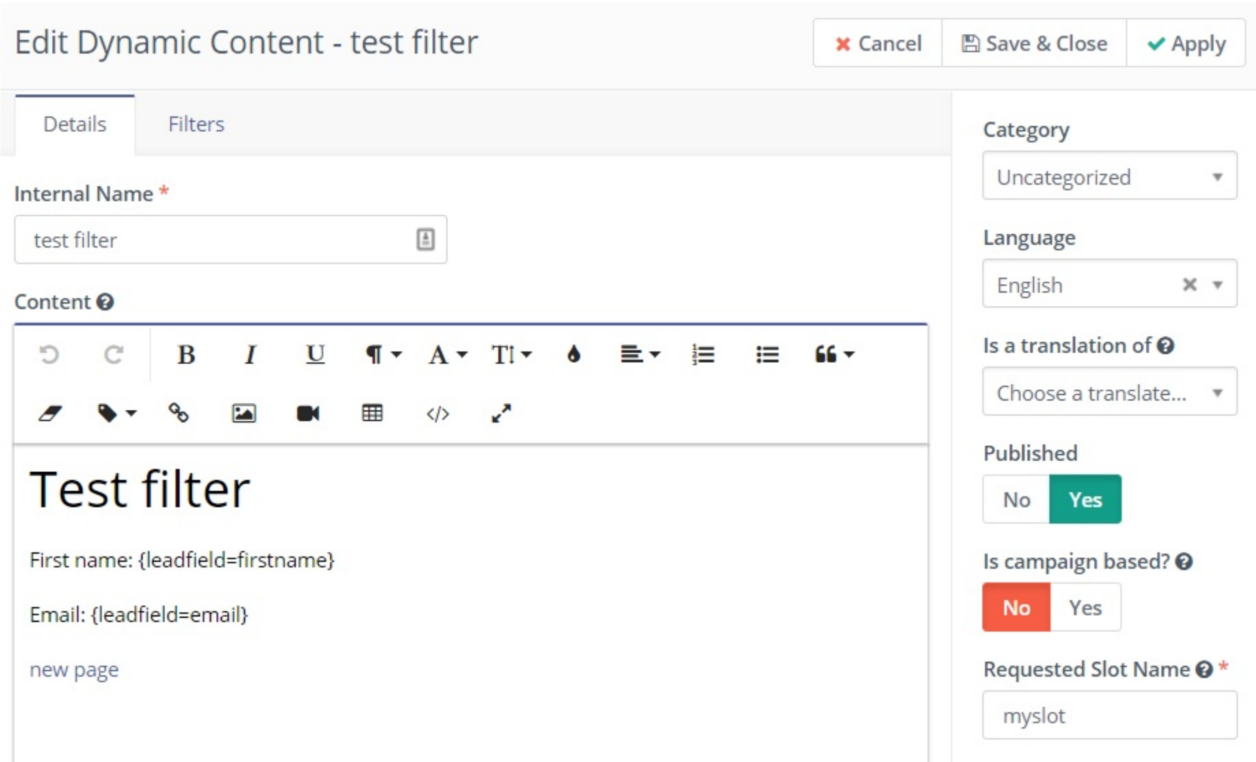
There are 2 types of Dynamic Web Content items (or DWC):

Filter based

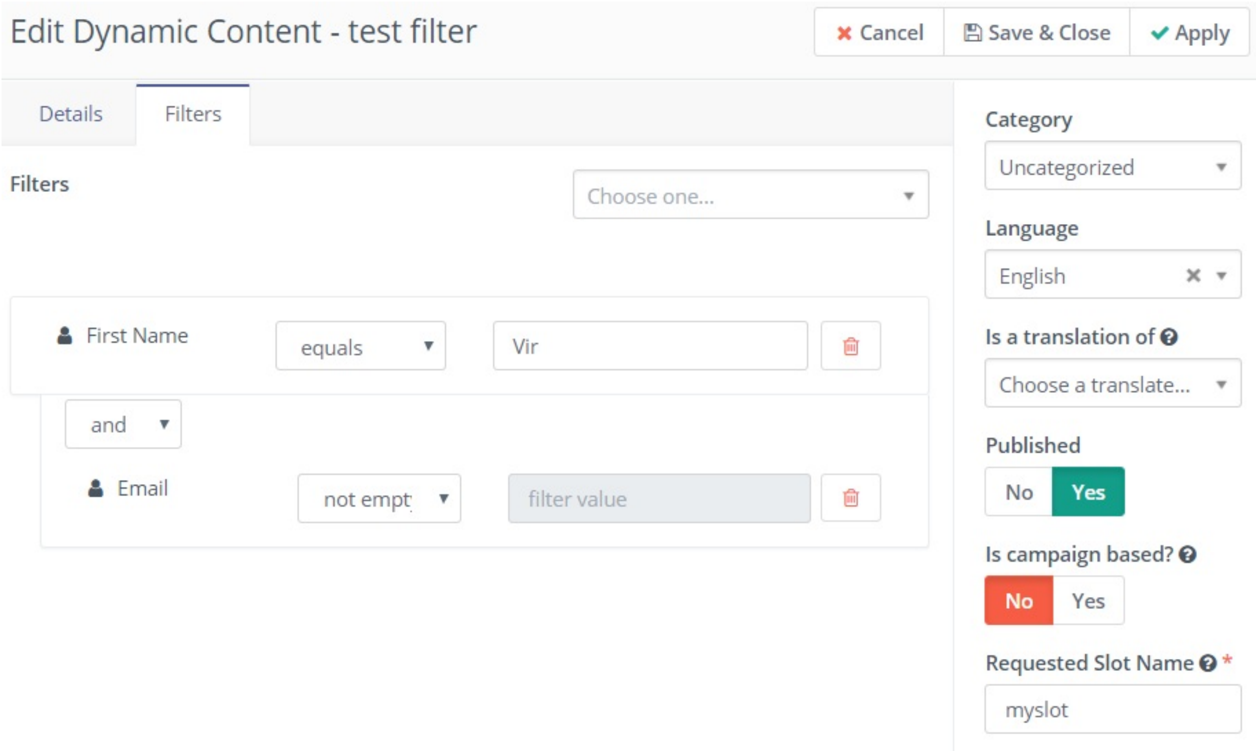
This feature allows you to configure filters (like in segments) so a Landing Page with a DWC token or slot can show content based on specific conditions.

Setup

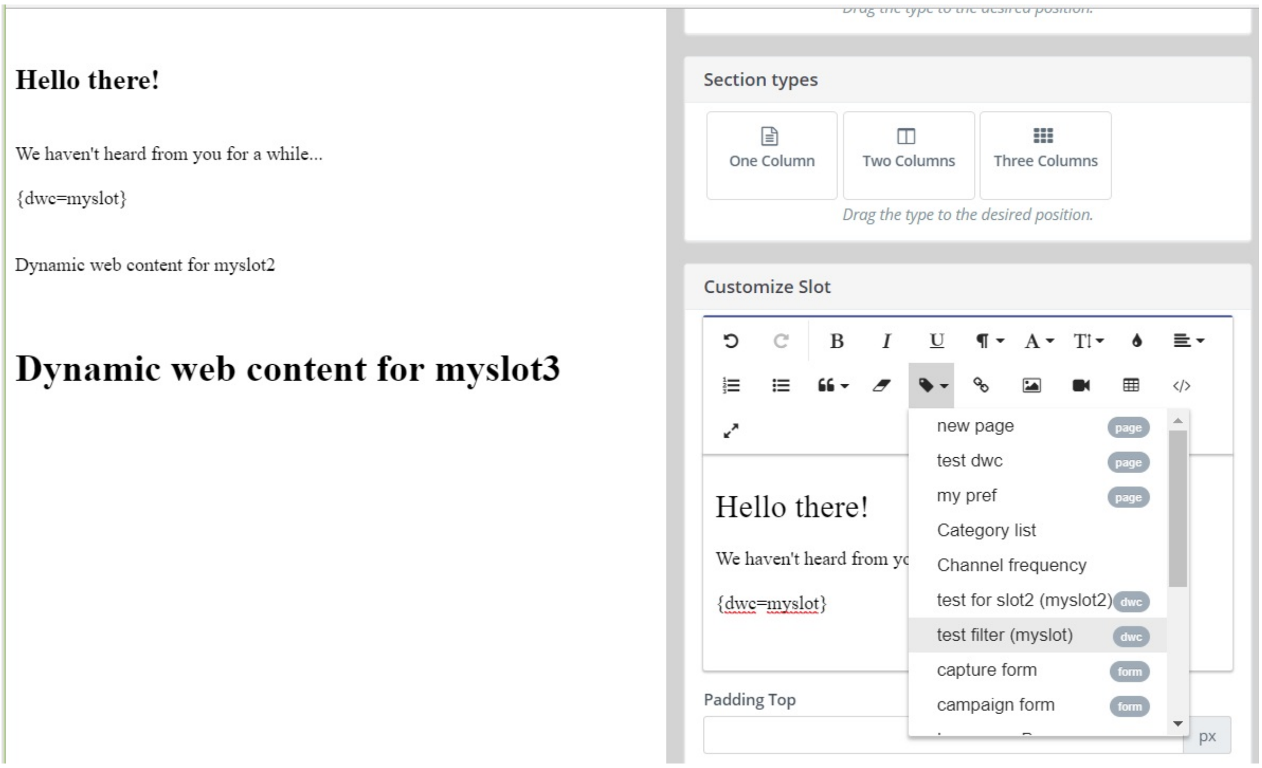
1. Create or edit a Dynamic Web Content item.



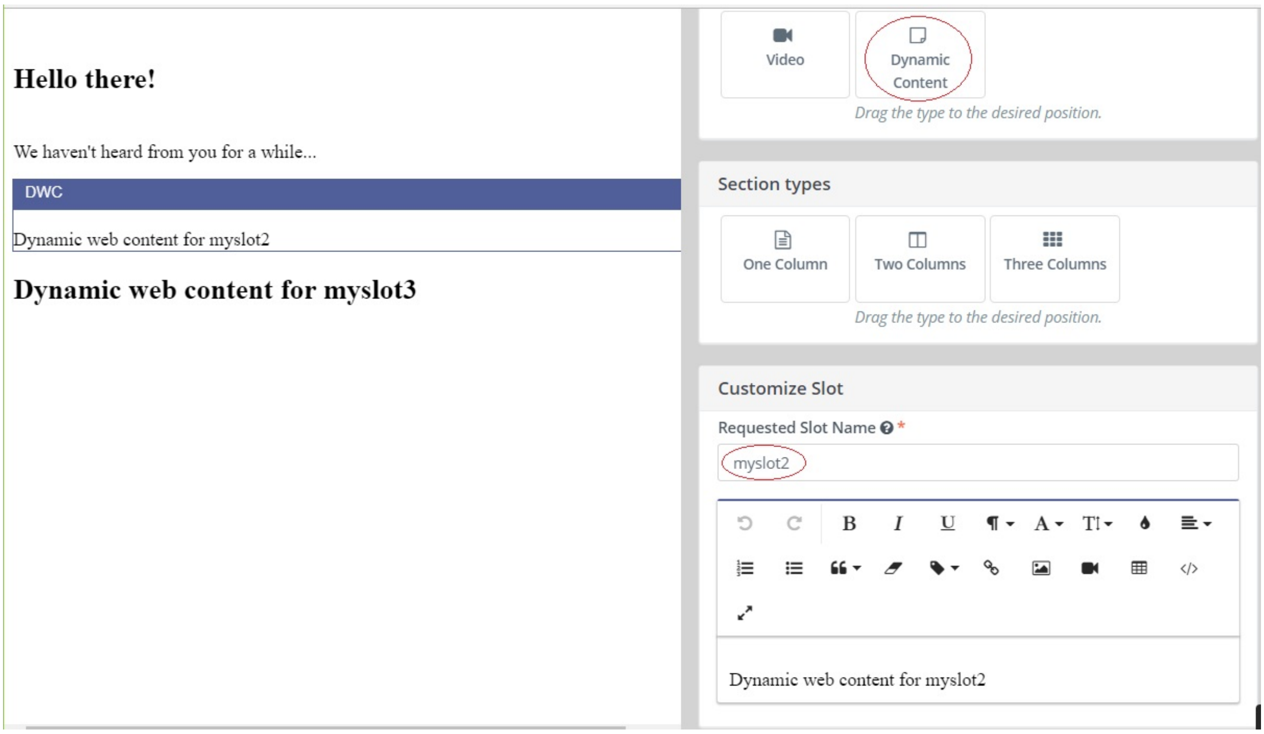
1. Toggle the "*Is campaign based*" button to **No** (Notice how when No is selected, the "*Slot Name*" field is available and the filters tab is displayed so new filters can be created.



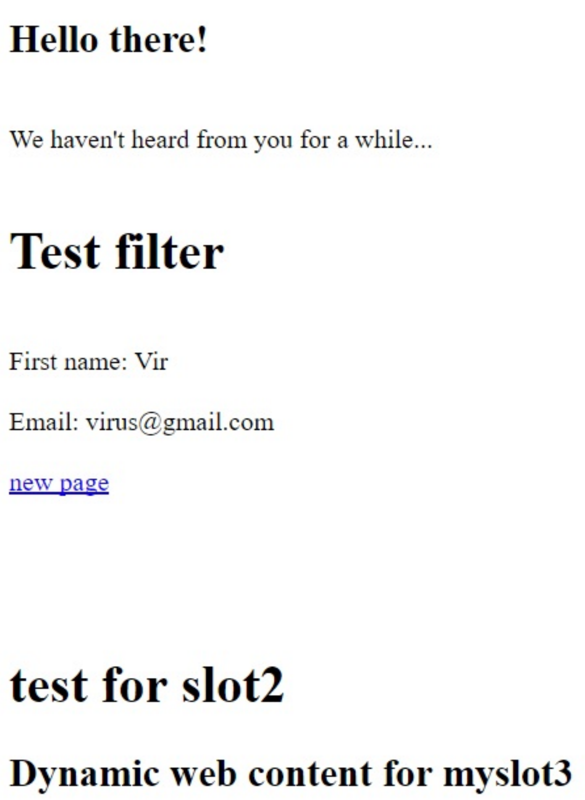
1. On a landing page, add a token or a slot for the new dynamic web content you just created.



1. When using DWC slots, you need to provide the requested slot name.



1. When someone visits the page and if the conditions on the filters are met, the DWC will be displayed.

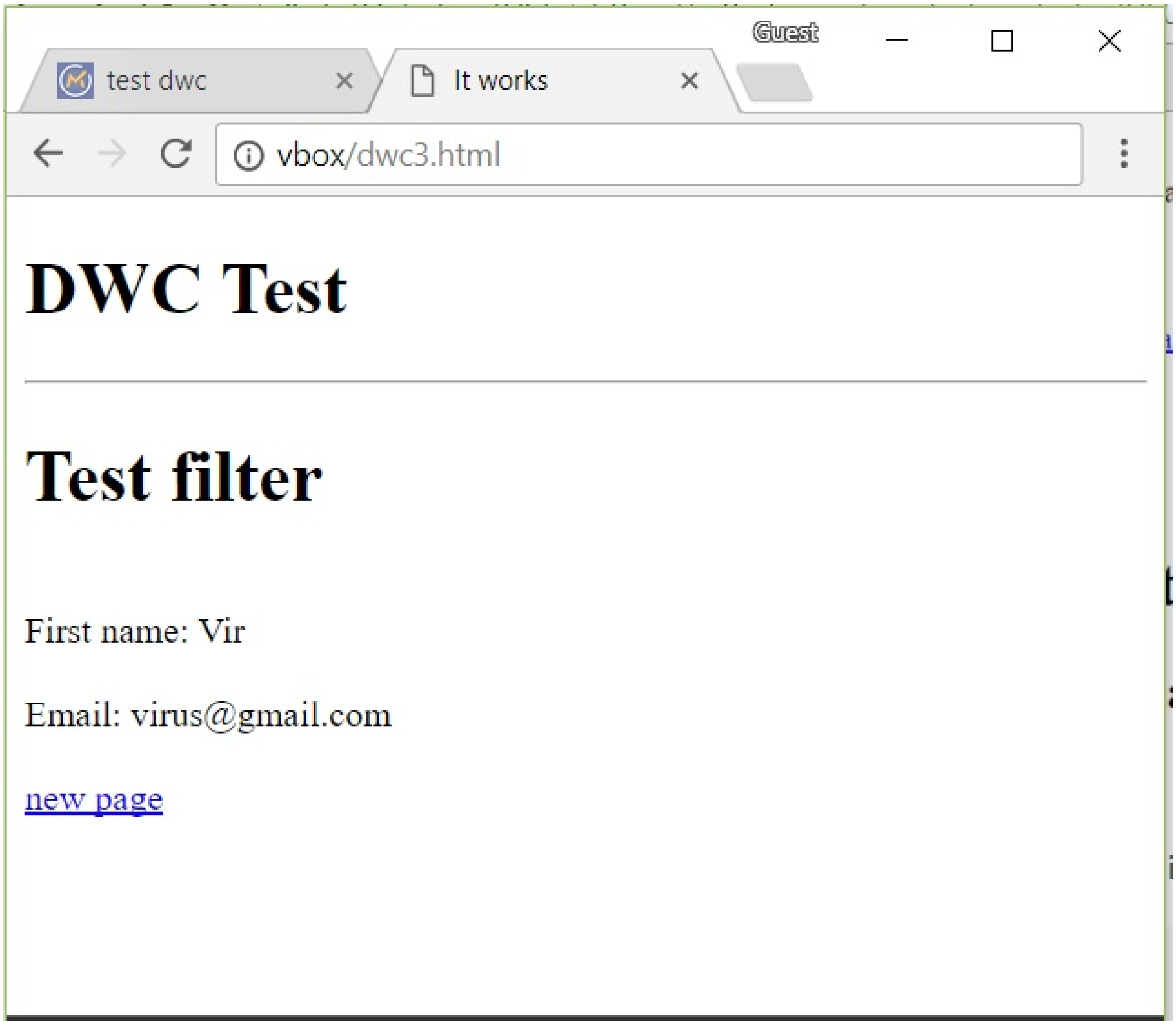


1. To add a DWC item with filters in a third party page, you can use the following code (just change `myslot` in `data-param-slot-name="myslot"` to the *Requested Slot Name* of your DWC item):

```
<div data-slot="dwc" data-param-slot-name="myslot">
```

```
  <h1>Dynamic web content for myslot</h1>
</div>
```

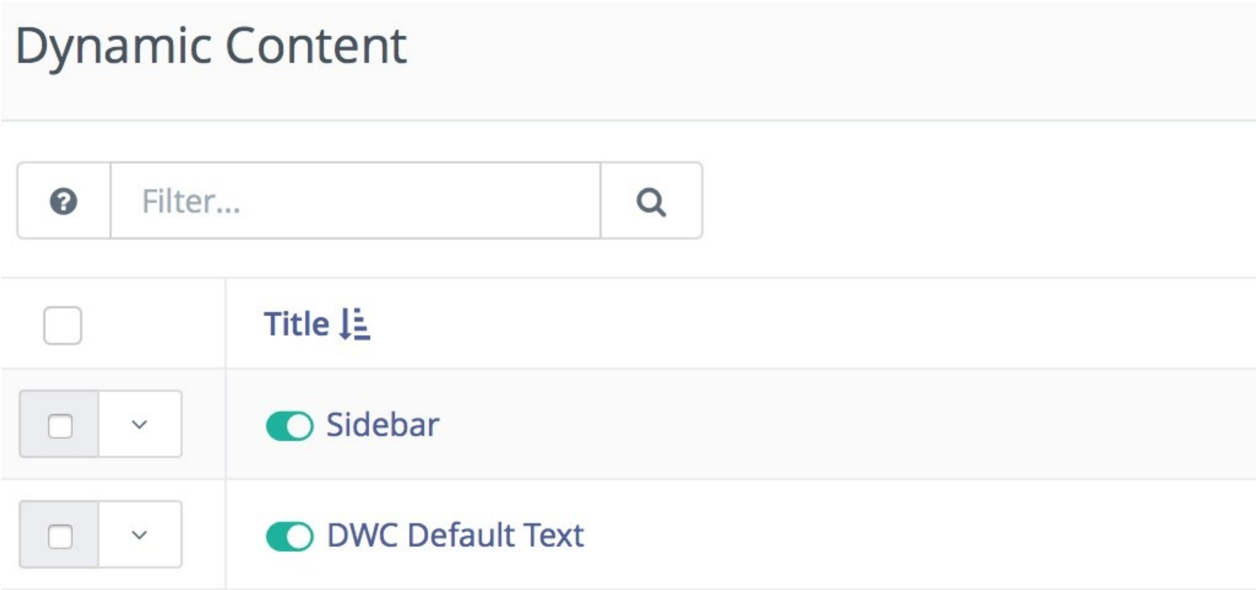
1. Again, when someone visits the page the DWC slot will be replaced if the filters match:



Campaign based

There are several steps involved in setting this up.

Add the default content

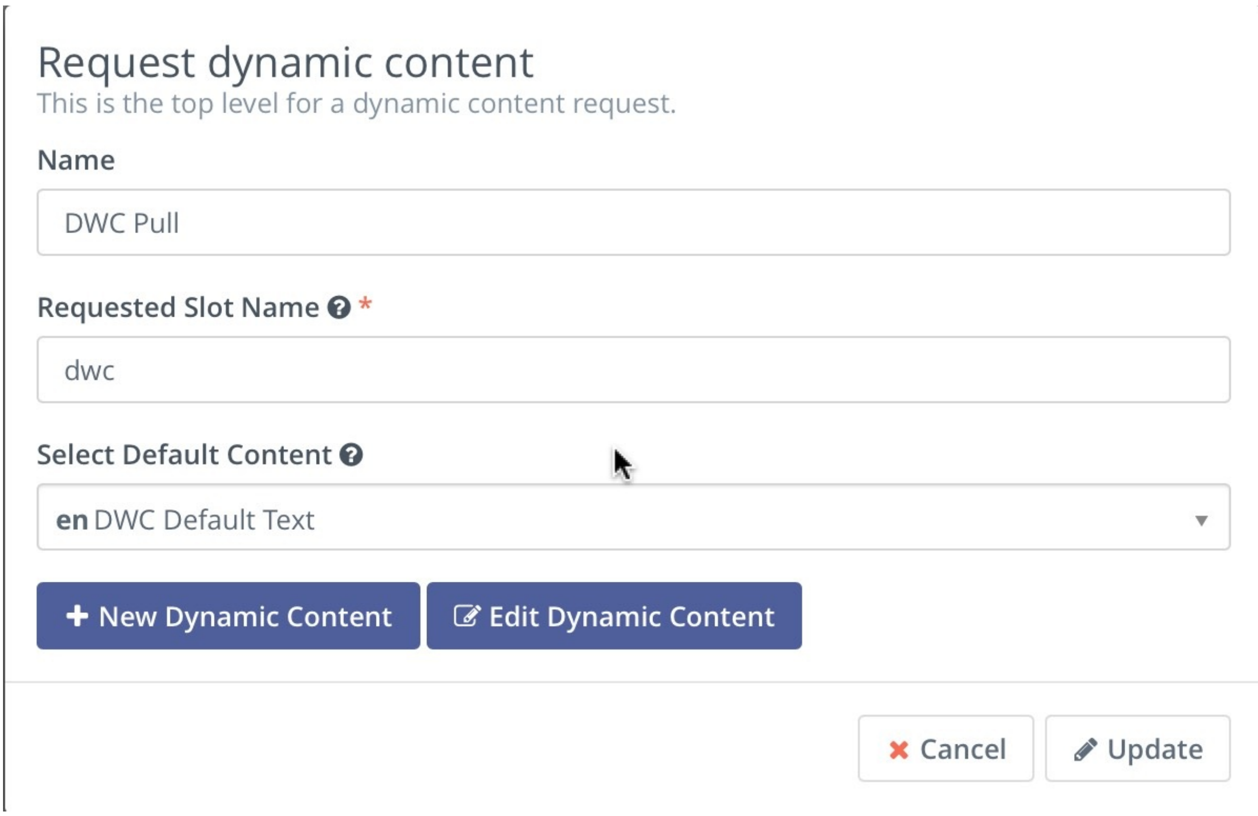


Add alternative content if desired

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

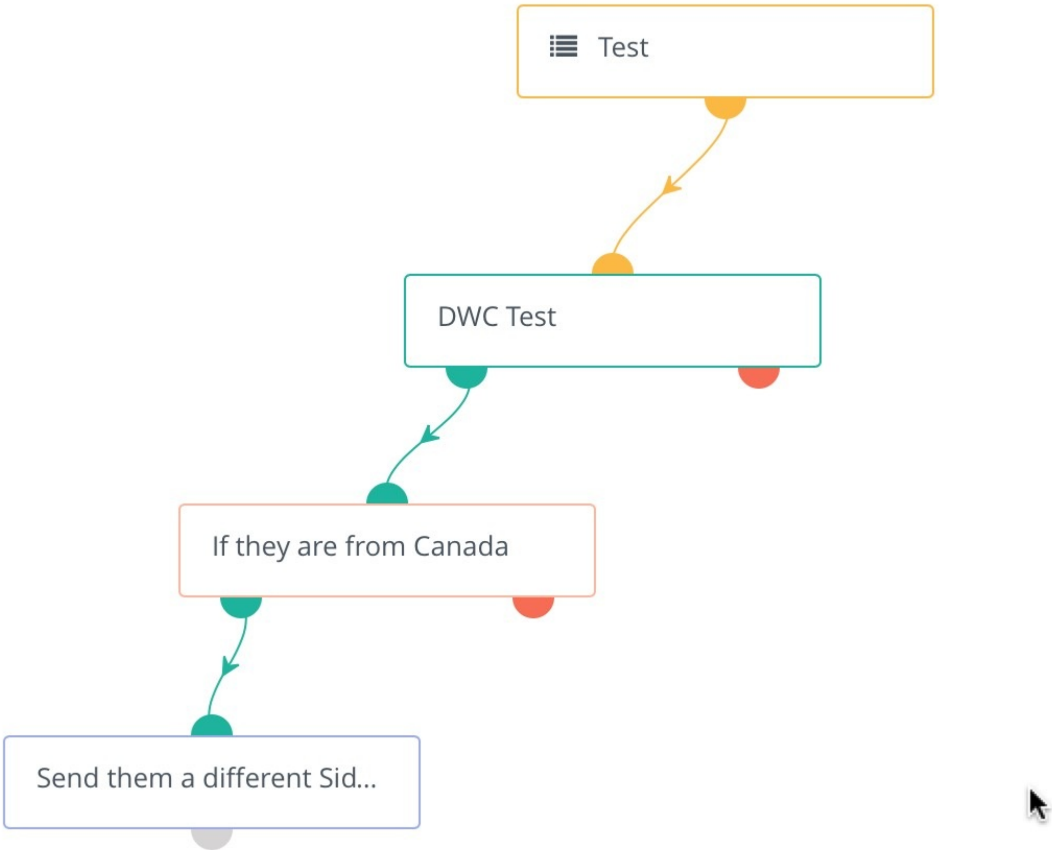
The key to this step is naming the "slot". This can be anything you want as long as it's unique across your dynamic content campaigns. The pull request is processed and determines if the person on the landing page is a known contact.



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 data-slot="dwc" data-param-slot-name="dwc">
  <h1>Dynamic web content for myslot</h1>
</div>
```

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

Watch a video tutorial.

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

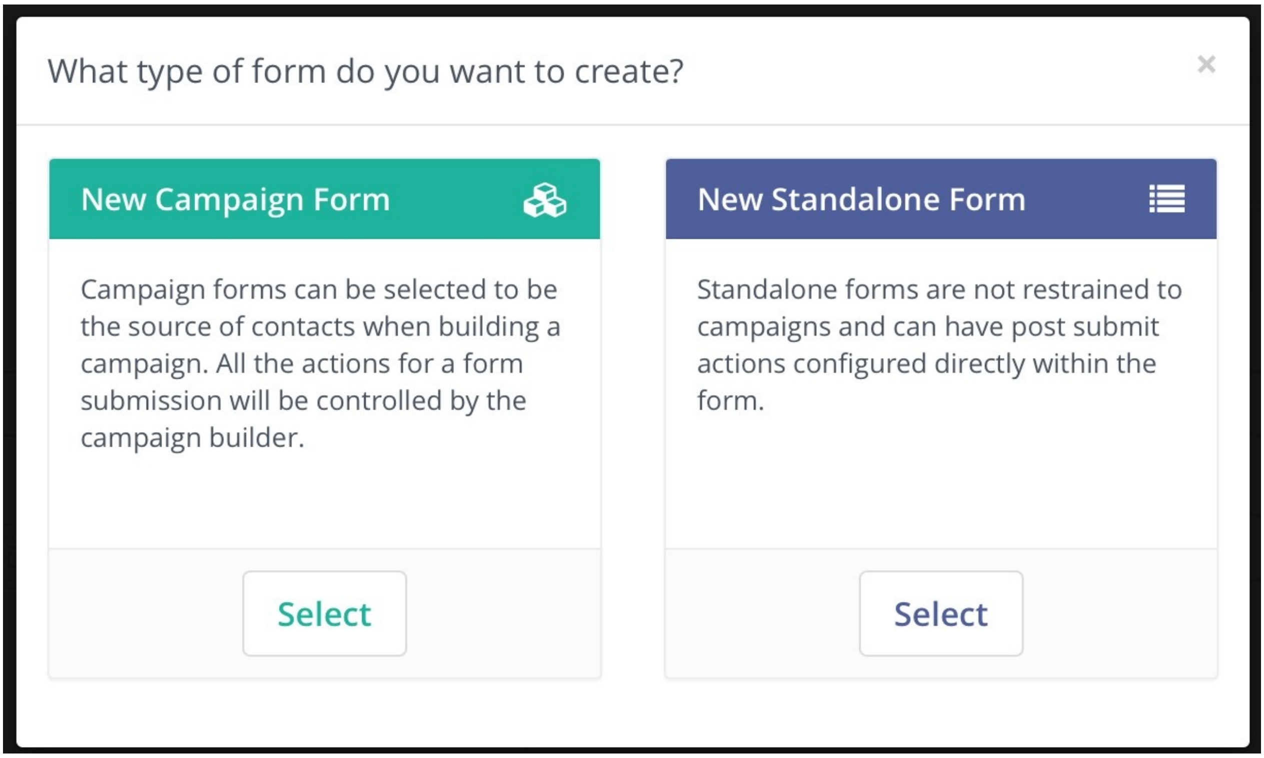
Dynamic web content supports these tokens:

- 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.

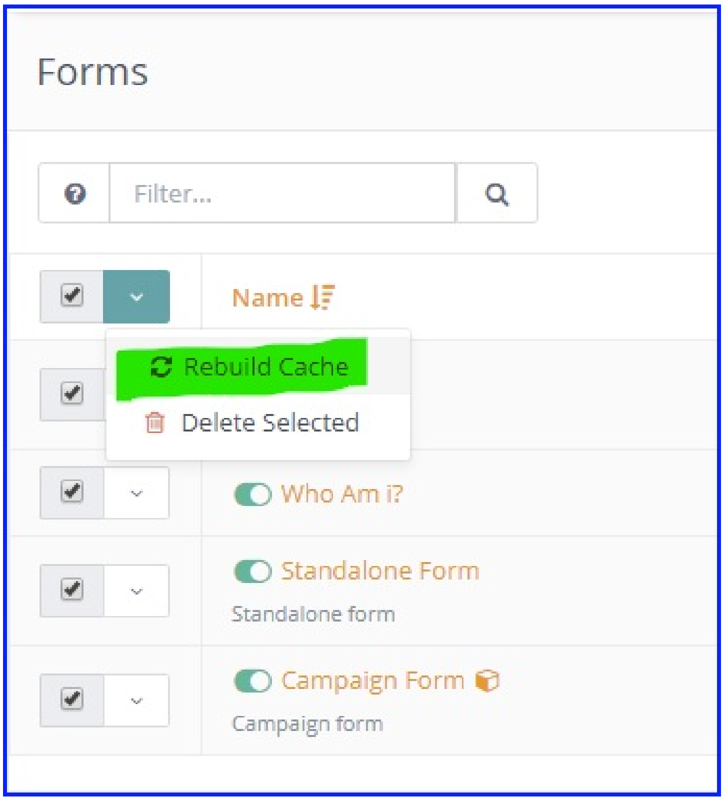
Form Troubleshooting

Form error messages does not show up or form redirect is not working

This is usually caused by URL mismatch. You can confirm this by going into the form preview page. Open the browser dev tools by pressing F12 on Windows or Linux or Option+Command+I on Mac. Go to the console tab and you should see 404 error on form JS.

To fix that, go to the Mautic Configuration and make sure the **Site URL** field is the correct Mautic URL root address (the one you see before the `/s/config/edit` part in the browser address bar) including the `http://` or `https://` . Save the configuration.

Now go to the Components / Forms and rebuild the forms HTML.



The 404 error should disappear after refres of the form preview page and the form validation messages should start working again.

FAQ

How to open an opt-in form in a modal window when the call-to-action button is clicked?

Often you need to show not an embedded form but a form that is showing up in a modal when a trigger button is clicked. Here is a short example how you can do that:

```
<html>
  <script type="text/javascript" src="https://example.com/form/generate.js?id=2"></script>

  <body>
  {mauticform id=2 style=modal element=.call-to-action-btn} <!-- setup modal form -->

  <a class="btn btn-default call-to-action-btn" href="#">Click me</a> <!-- trigger button -->

  </body>
</html>
```

Manage Forms

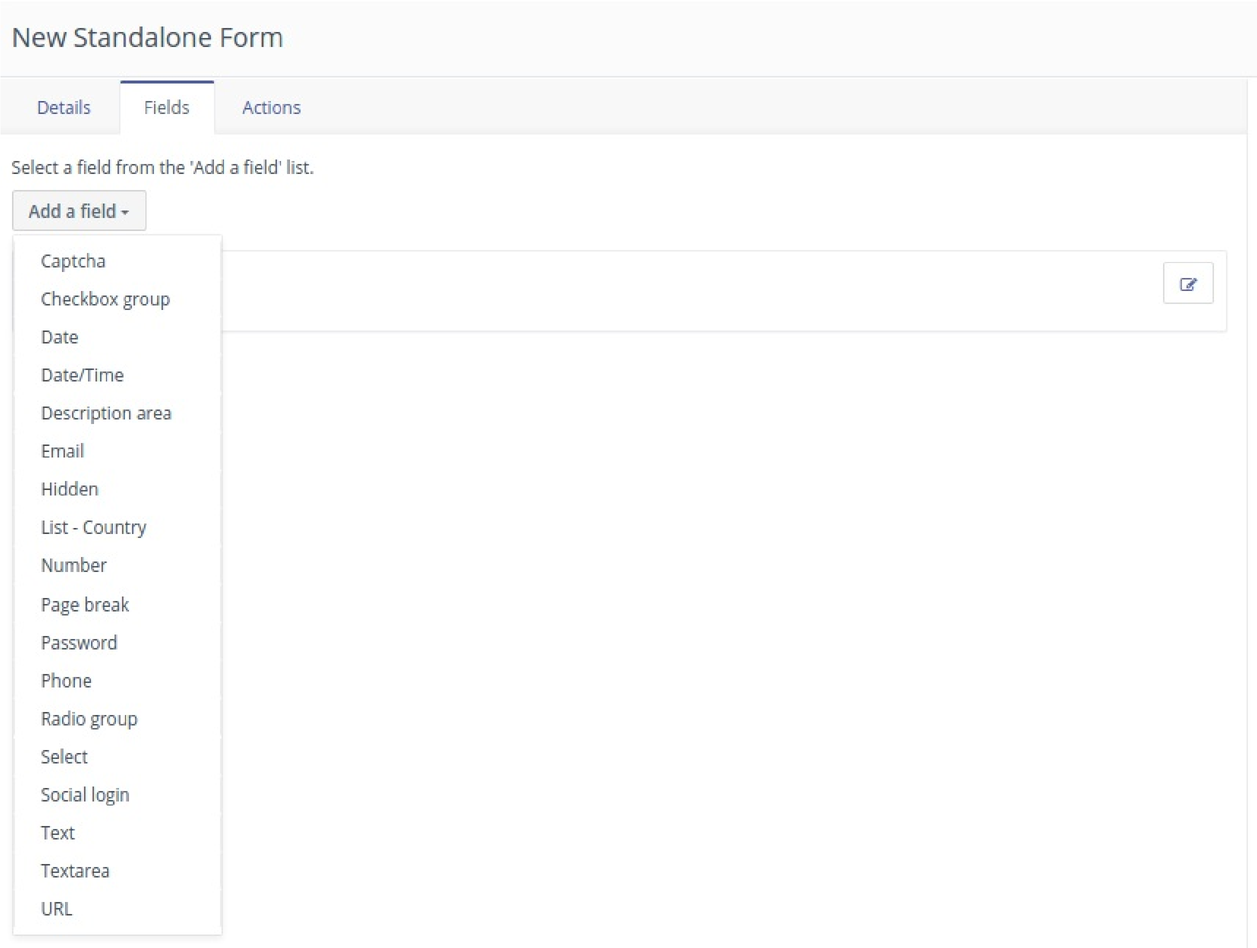
The new form view lets you create a form and attach any fields you want to collect from your users. After you've created the fields you can then define what actions you want to perform after the user submits the information.

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

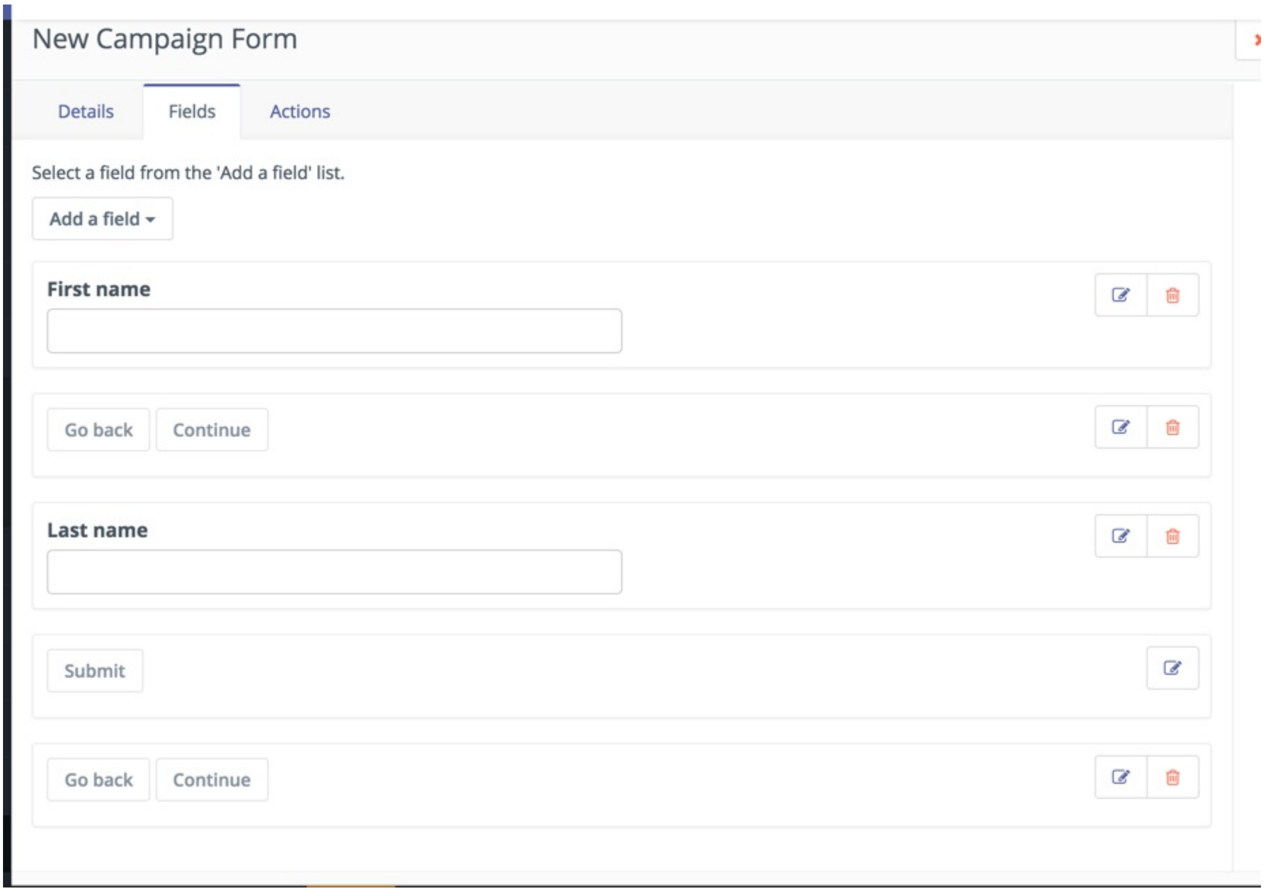
A form can contain as many fields as needed. These fields can be laid out dynamically by the system or handled via HTML if you want more control.



Page Breaks

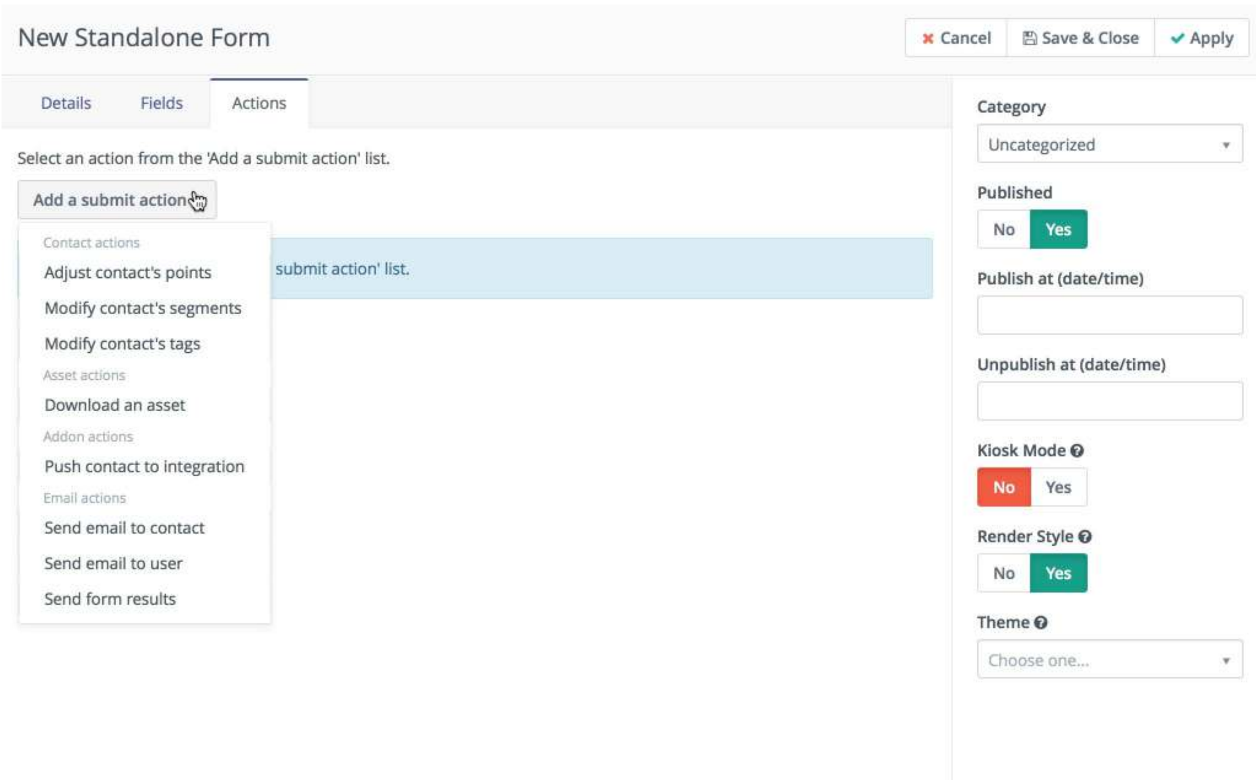
Page breaks is a new feature in Mautic 2.2.0 that allows multi-paged forms. Note that the submission does not happen till the final page and the submit button is pressed.

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 Mautic 2.2.0, different actions are available based on form type.



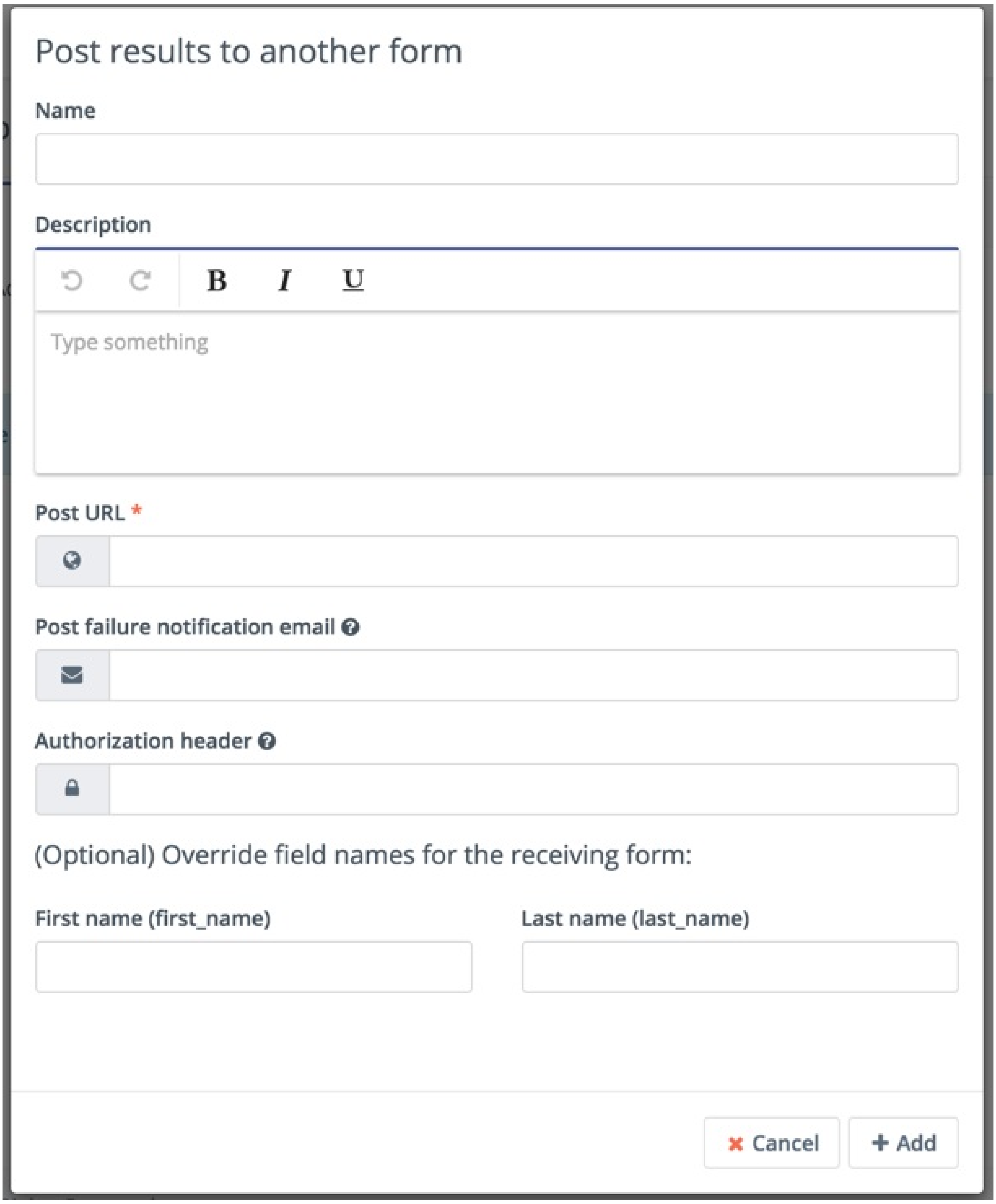
Form Re-Post Action

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*.

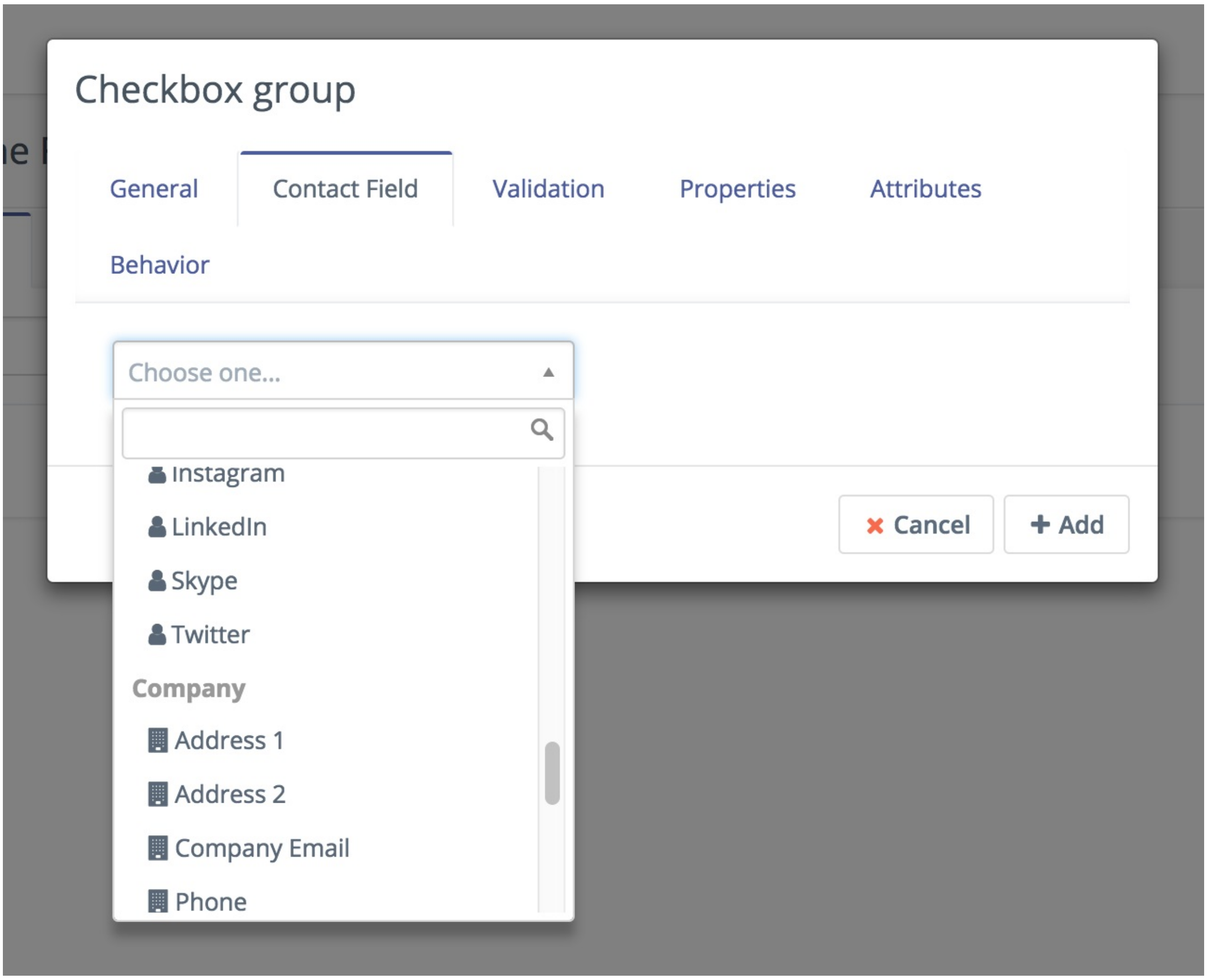
In addition to the form data, an array of `mautic_form` with details like ID, name, and the URL the form was submitted to (if available) along with `mautic_contact` with the details of the contact that submitted.



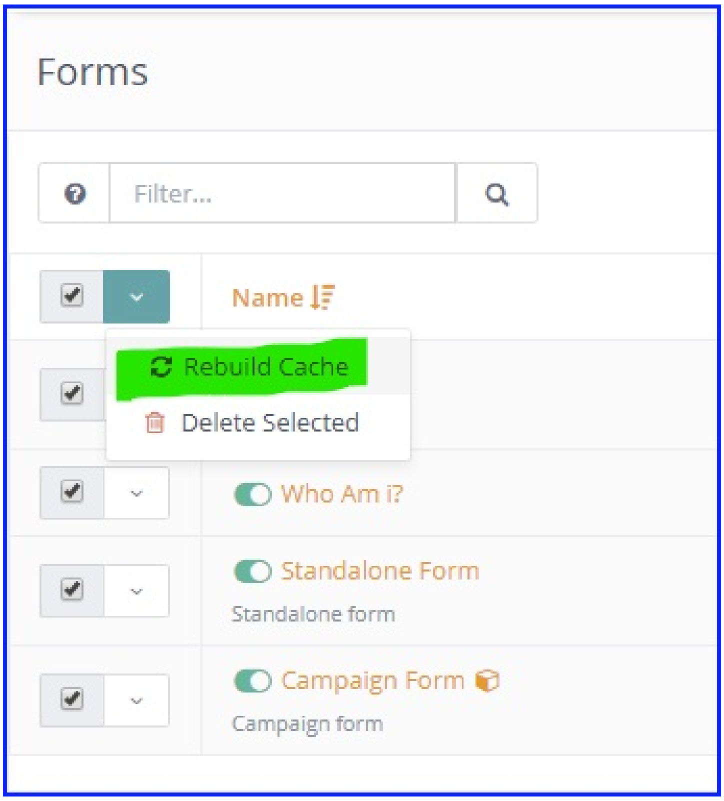
Creating and Updating Contacts and Companies with Forms

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 Mautic 2.10.0 you are now able to match form fields with company fields in order to create a company and link it to the contact created through the form. You will only be able to create a company if the company name field is populated. It will update the company if it can identify it through Company Name and Country, City and State.



As of Mautic 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.

No index mode

In Mautic 2.15.0, [Mautic][mautic] introduced the ability to disable search engines from indexing forms. With this option you can disable search engines from indexing `https://example.com/form/{formid}` if set to "Yes".

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.

> **ProTip**

> **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.**

```
<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','https://example.com/mtc.js','mt');

    mt('send', 'pageview');
</script>
```

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 `FIELDNAME` from the value of the `<input name=mauticform[FIELDNAME]` attribute.

```
<div id="mauticform_democampaignform_email" data-validate="email" data-validation-type="email" class="mauticform-row mauticform-
    <label id="mauticform_label_democampaignform_email" for="mauticform_input_democampaignform_email" class="mauticform-label">E
    <input id="mauticform_input_democampaignform_email" name="mauticform[email]" value="" placeholder="user@example.com" class="
    <span class="mauticform-errormsg" style="display: none;">This is required.</span>
</div>
```

Pre-populate the values automatically in an email

Embed the tokens `{contactfield=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={contactfield=email|true}
```

In the rendered email sent to a contact, the URL may be converted into something like: `http(s)://example.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 `{contactfield=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 *button* field. We recommend use email field visible because it is the identifier of a contact. 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. From Mautic 2.9 email can be hidden, but be aware of that. Email as identifier of a contact could be unusable if same PC is used by more people (public library, schools...).

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.

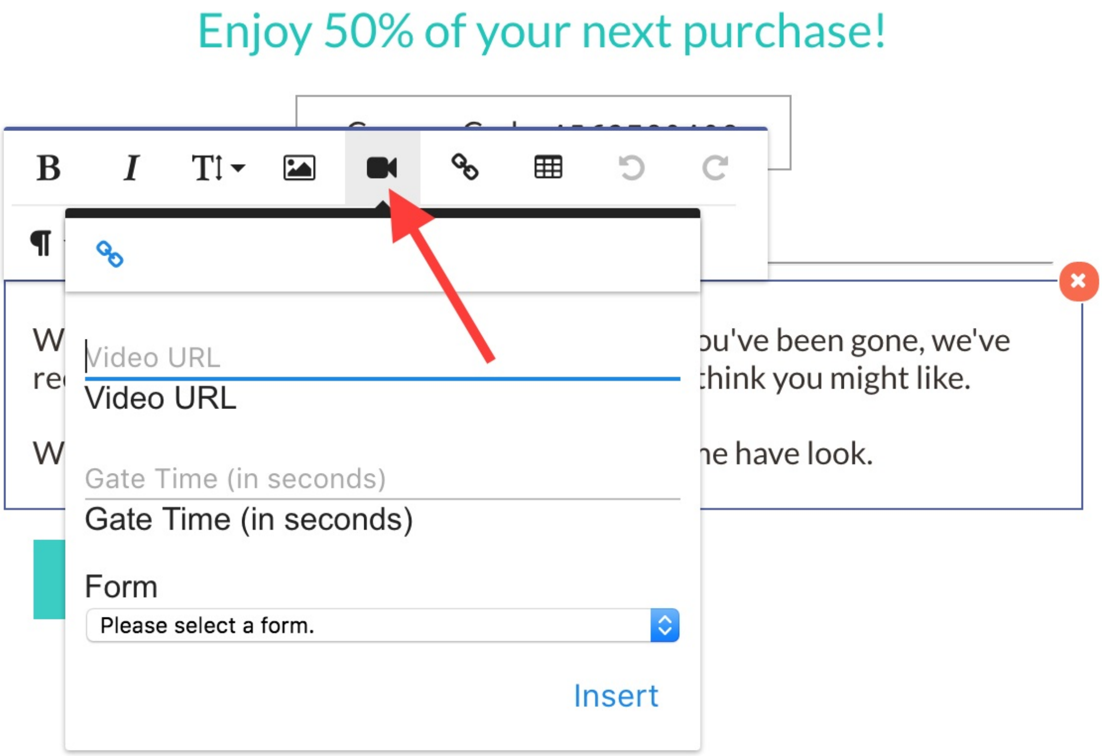
Any `<video>` tag found by the javascript that has a `data-form-id` and `data-gate-time` attribute will be treated as a gated video by the Mautic javascript. The simplest way to embed a gated video is to embed the HTML below on a page where the Mautic tracking javascript is installed.

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.



Tracked videos (Mautic 2.9.1 and above)

Mautic allow track contacts play/stop/time length action without gated feature. Any `<video>` tag found by the javascript that has a `data-mautic-video="true"` attribute will be treated as a tracked video by the Mautic javascript.

```
<video width="640" height="360" data-mautic-video="true">
    <source type="video/mp4" src="https://example.tld/video.mp4" />
</video>
```

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.

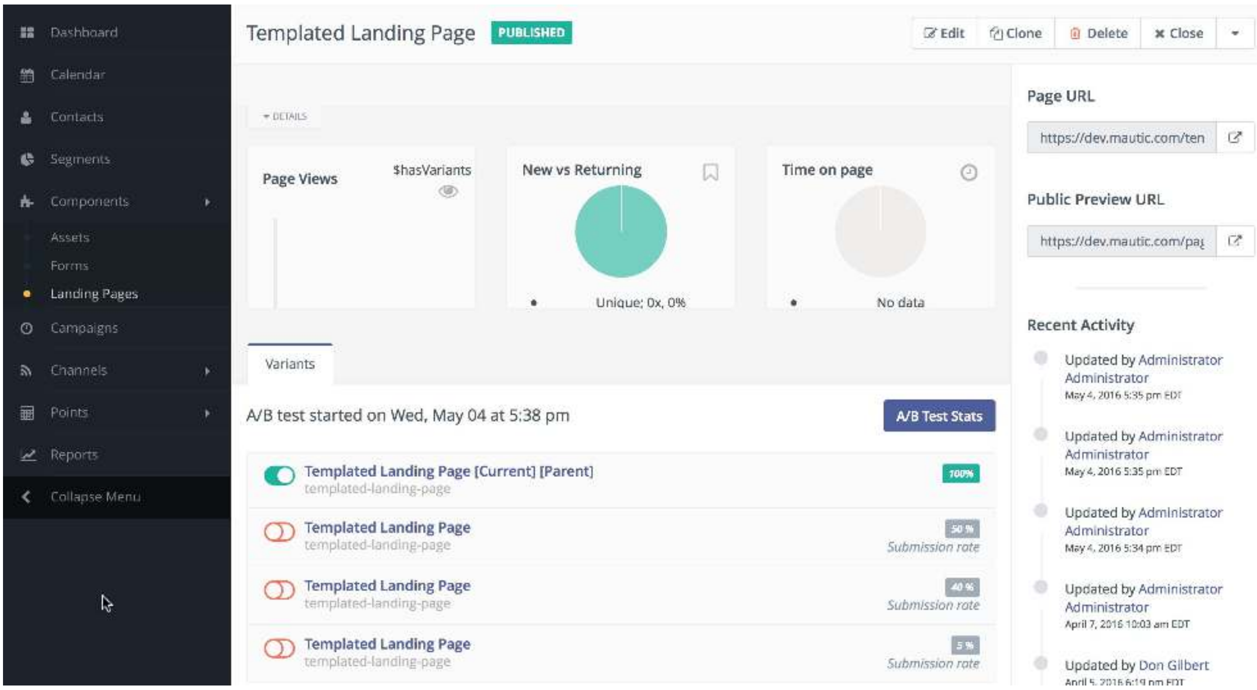
Features of Landing Pages

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

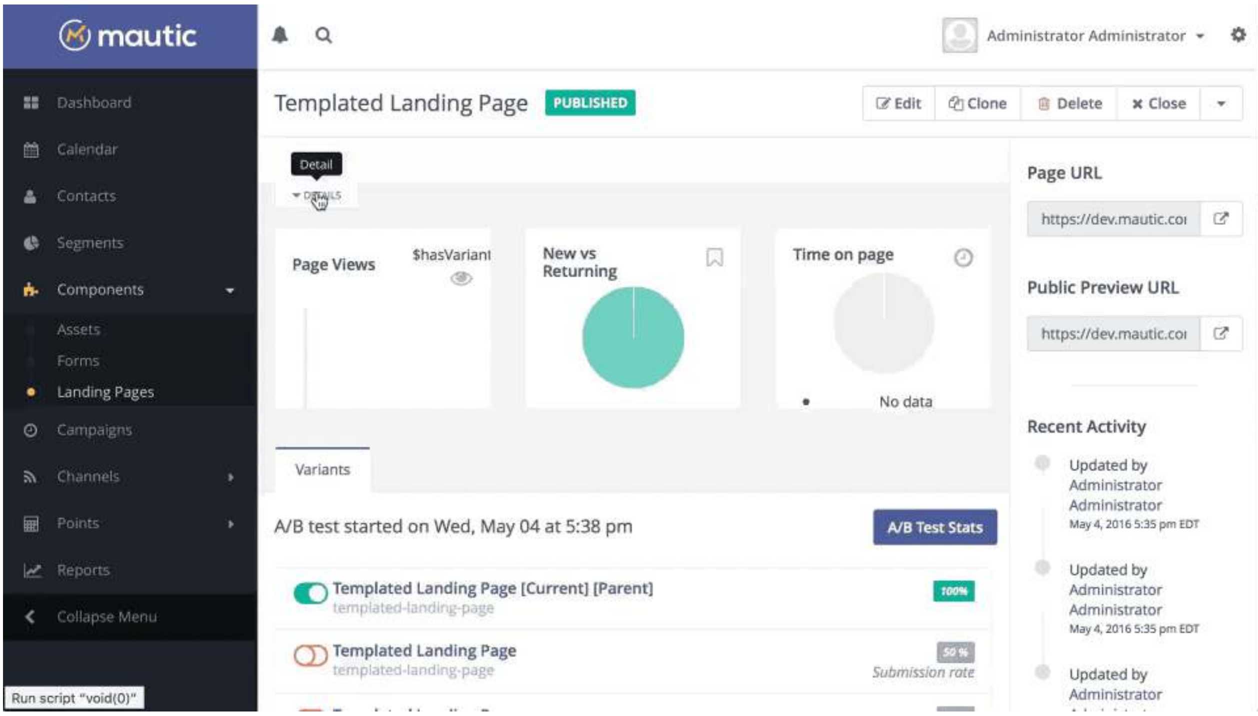
When viewing a page within Mautic you can find a tremendous amount of information on a single page overview.



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.

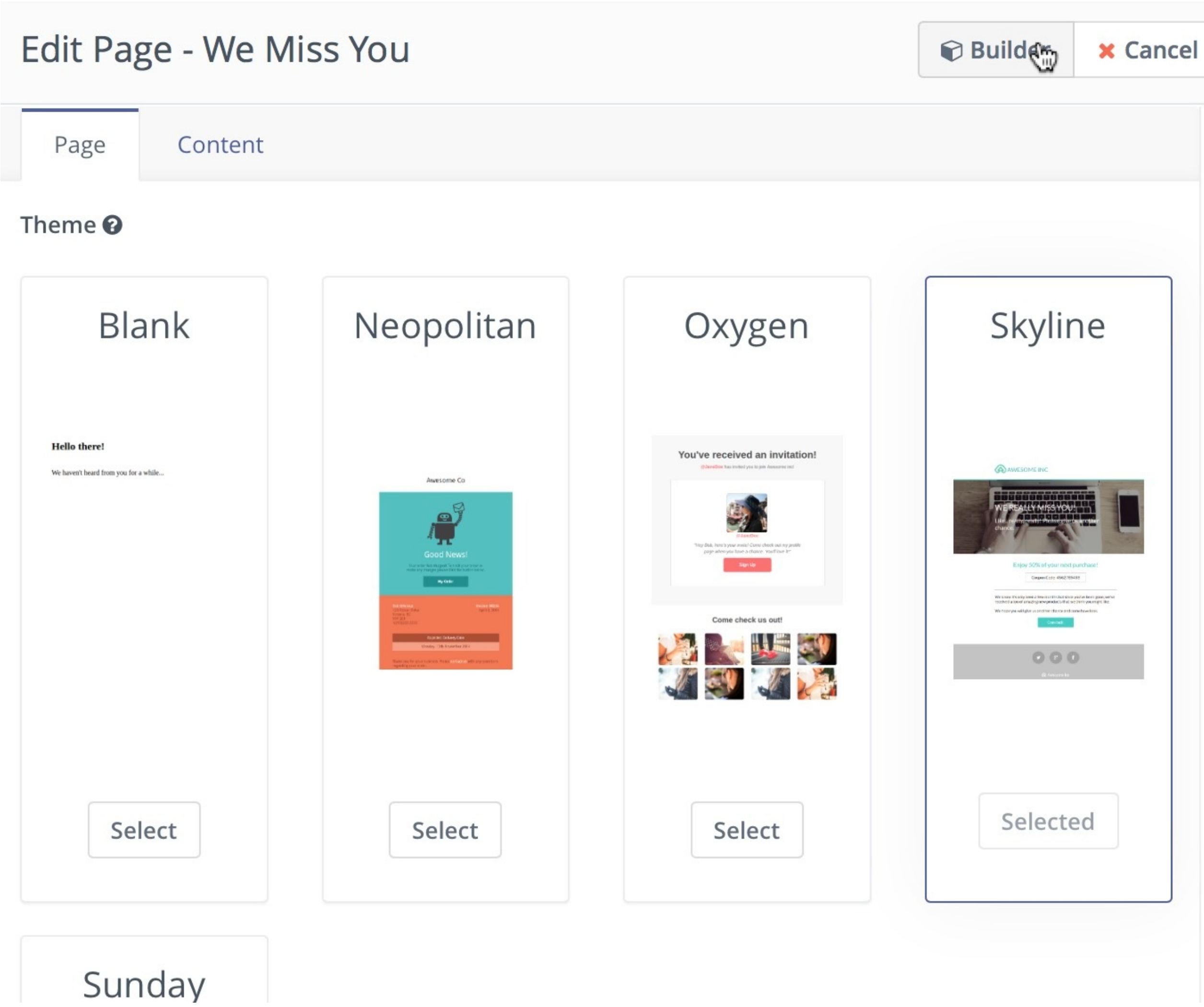
When creating/editing a landing page, there are the options to configure a language and translation parent. By selecting a translation parent, the current item is then considered to be a translation in the selected language of that parent item.

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.

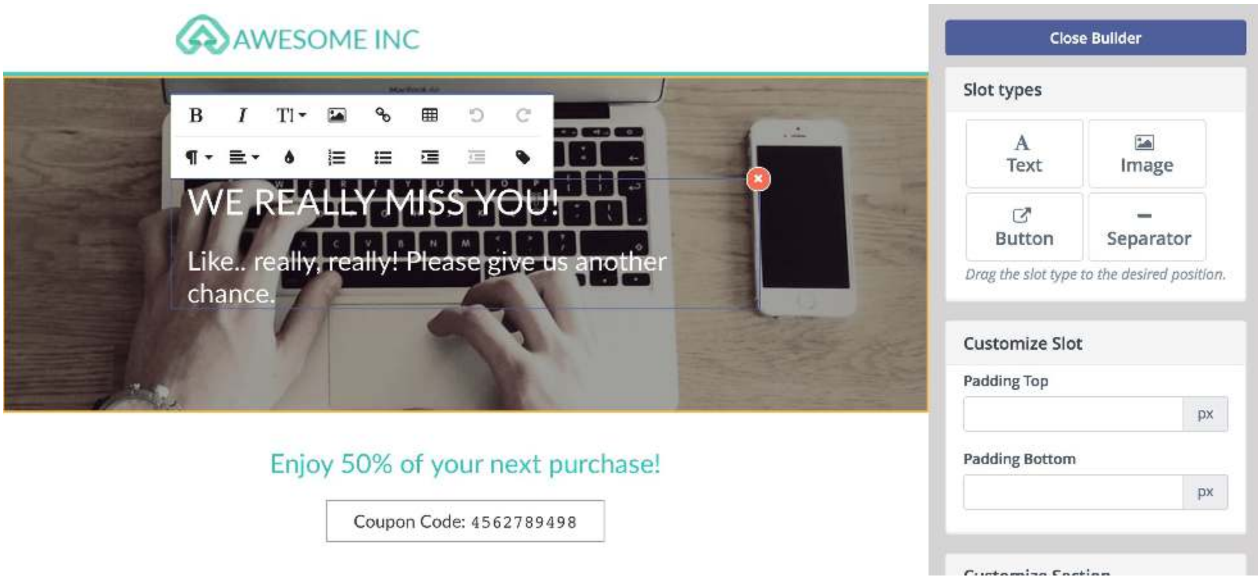
It is also possible to have translations of A/B test variants.

New/Edit Pages

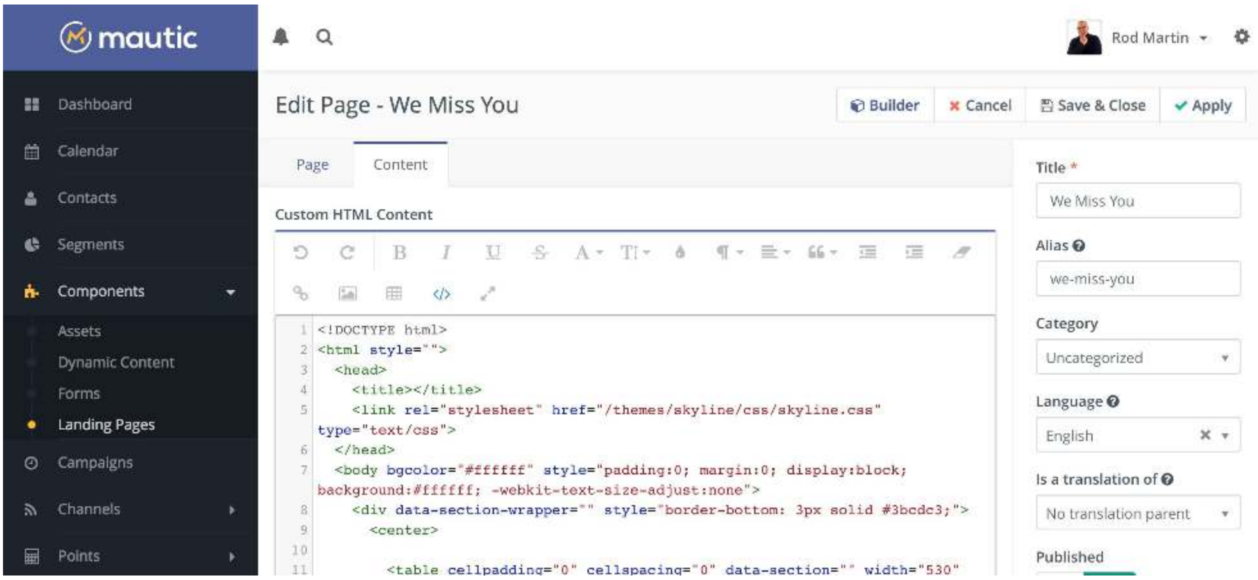
The page form allows you to create new pages and offers a number of fields for your convenience. You will notice most of them in the following screenshot. In particular you will notice the Page Builder button on the top toolbar. This is where you will launch the page builder to easily create your page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

Disable search indexing

Mautic 2.13 added new option Block search indexing with noindex. You can prevent a page from appearing in search engines like Google, Bing etc.

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.

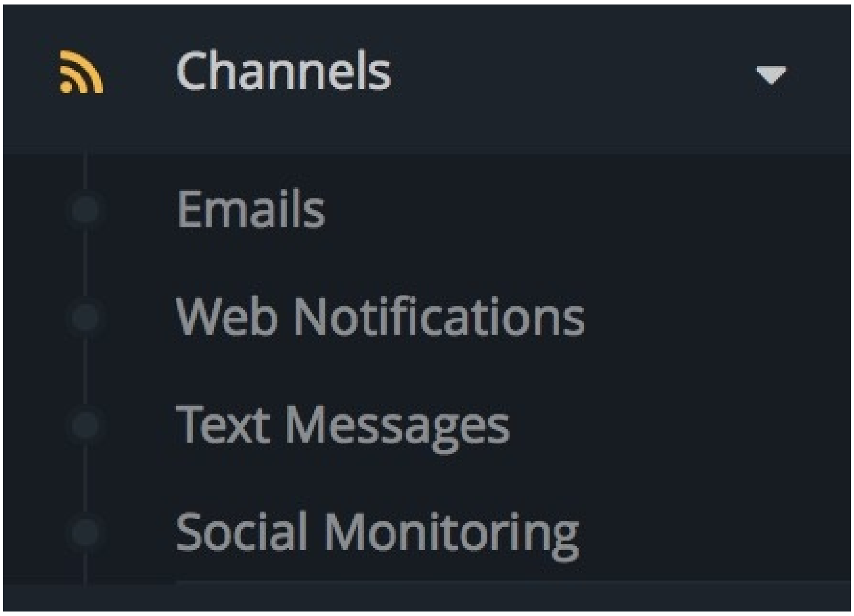
How to use this feature

- 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
- Social Monitoring
- Mobile Notifications
- Tweets
- Social Monitoring

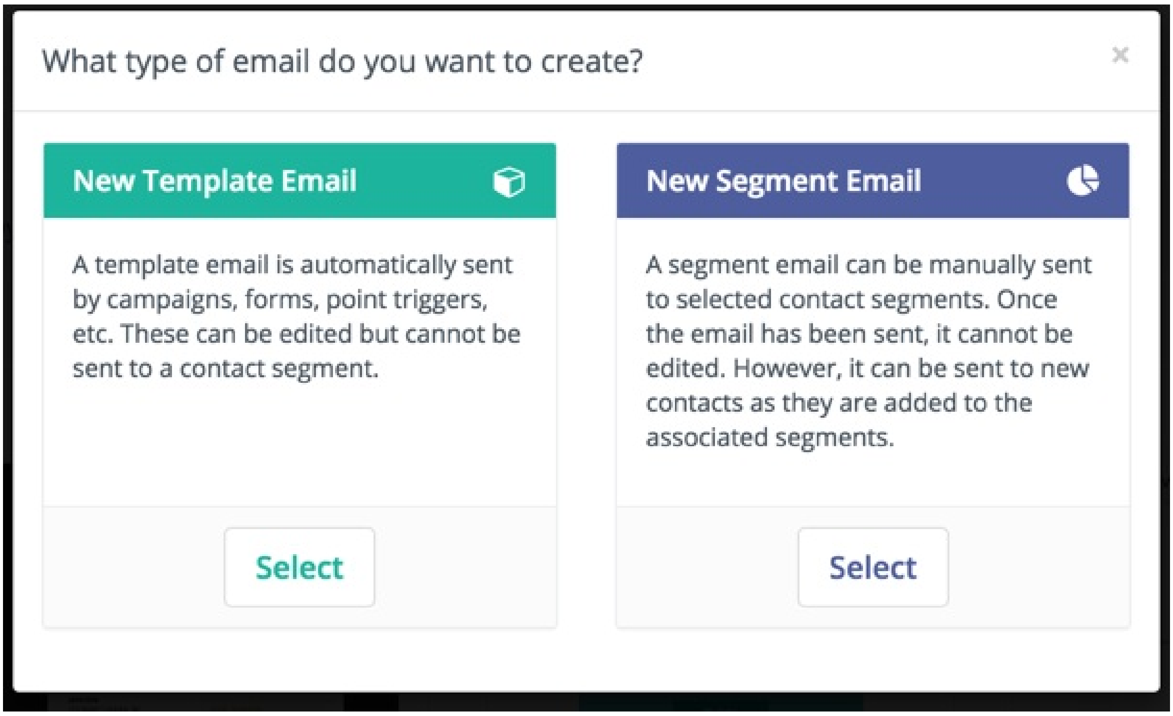
All of these must be created or configured before you can use them in a campaign.



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.

By default, the tracking pixel image is added at the end of the message, just before the `</body>` tag. If needed, one could use the `{tracking_pixel}` within the body content token to have it placed elsewhere.

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.

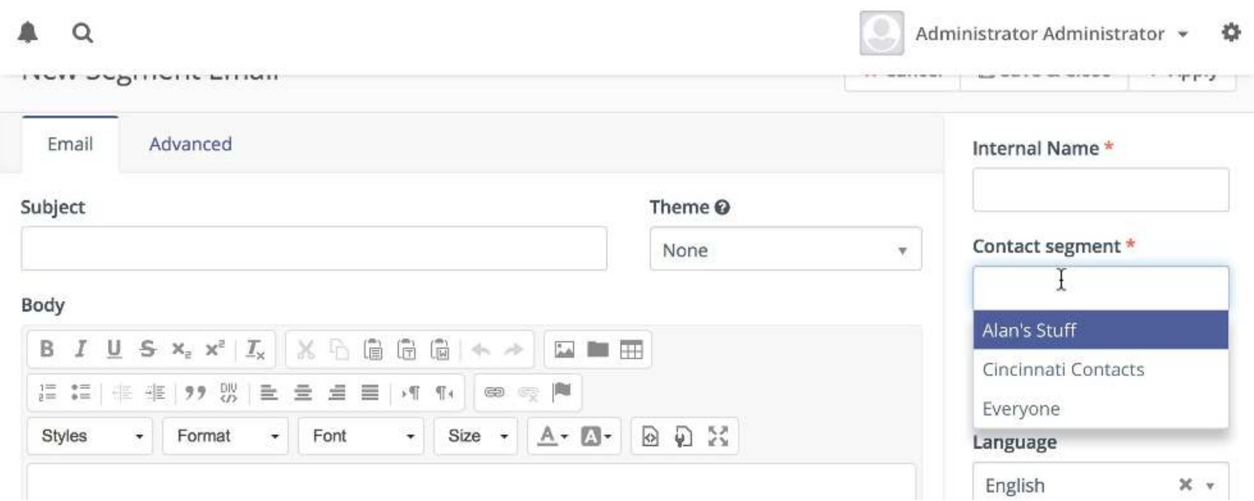
Translations

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.

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, Webview link and the Tracking pixel:

- `{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.
- `{tracking_pixel}` - Creates a 1 pixel image that allows to track email open.

Contact token modifiers

Default value

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}.

Encoded value

Embed the tokens as `{contactfield=FIELDALIAS|true}`. The |true tells Mautic to encode the value used for example in urls.

Date format

For custom date fields use:

- `{contactfield=DATEFIELDALIAS|datetime}`
- `{contactfield=DATEFIELDALIAS|date}`
- `{contactfield=DATEFIELDALIAS|time}`

Your date will displayed as human reading format taken from Configuration > System Settings

- Default format for date only
- Default Time Only Format

Tracking Pixel

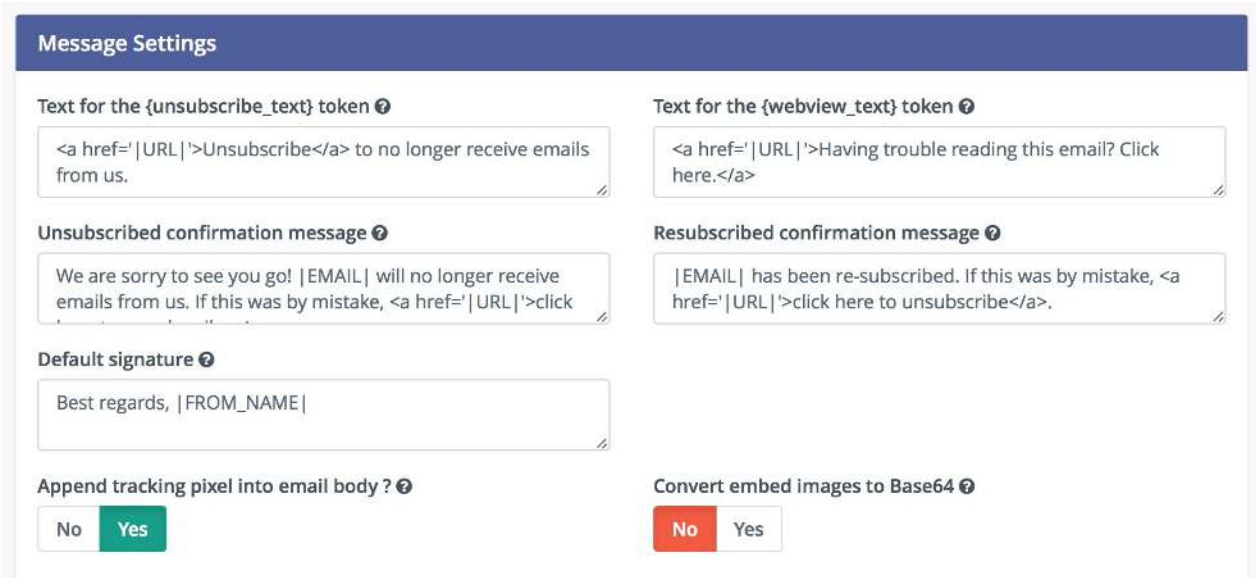
The tracking pixel image is usually appended to the email message, if enabled. If needed, one could insert the tracking pixel image with the special token `{tracking_pixel}` at any place other within the text body. Beware that it should not be inserted directly after the opening `<body>` because this prevents correct display of pre-header text on some MUAs.

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

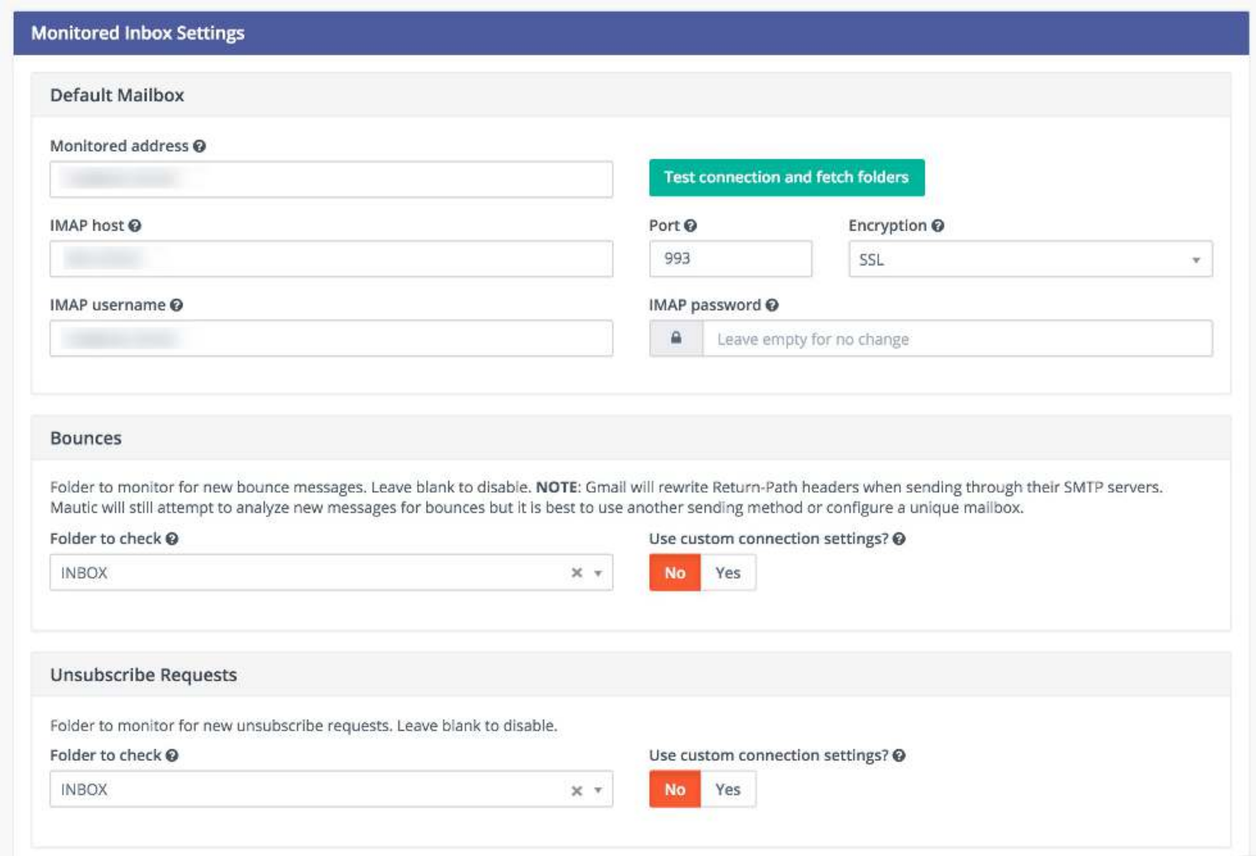
Since version 1.2.0 Mautic has provided a feature which allows monitoring of IMAP accounts to detect bounced emails and unsubscribe requests.

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.

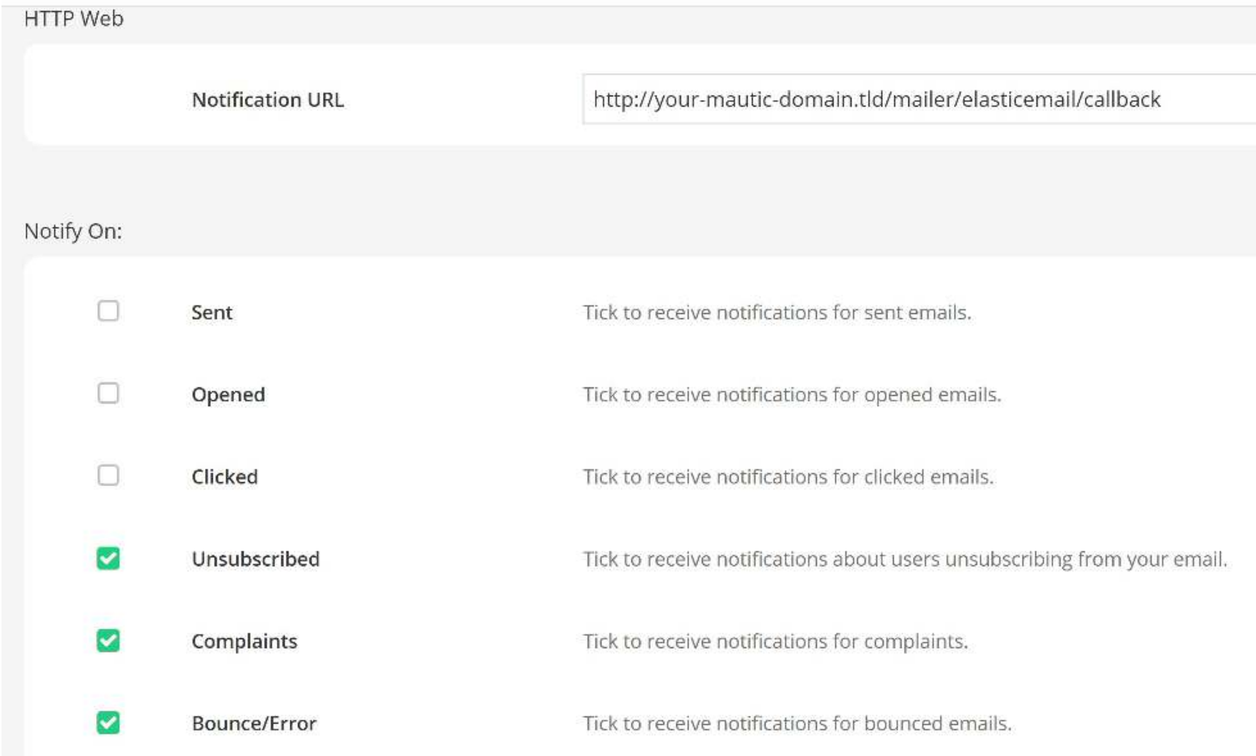
All contacts with bounced emails should appear in this segment.

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



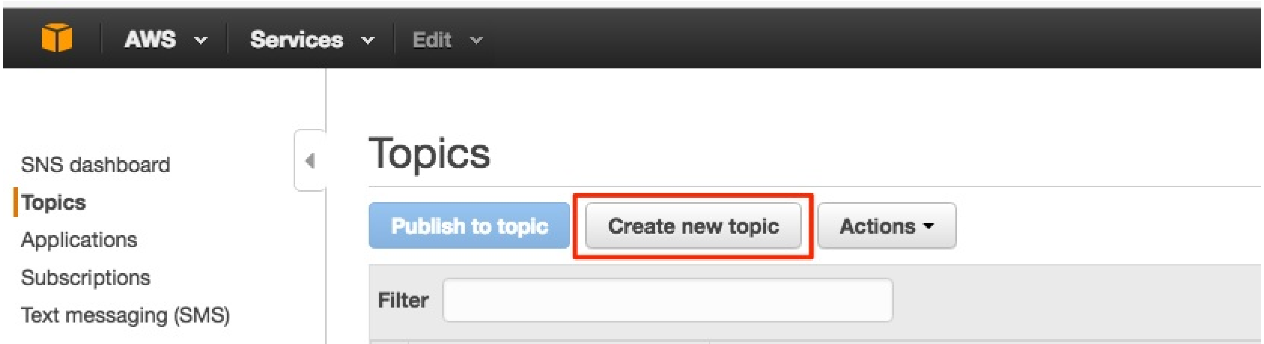
Links

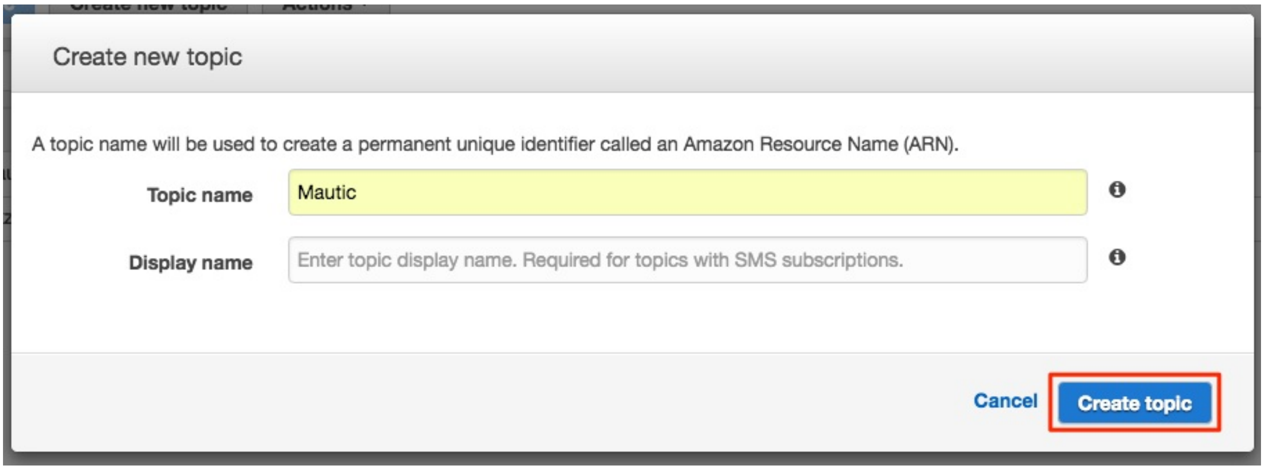
Elastic Email Help & Support Support via email

Amazon Webhook

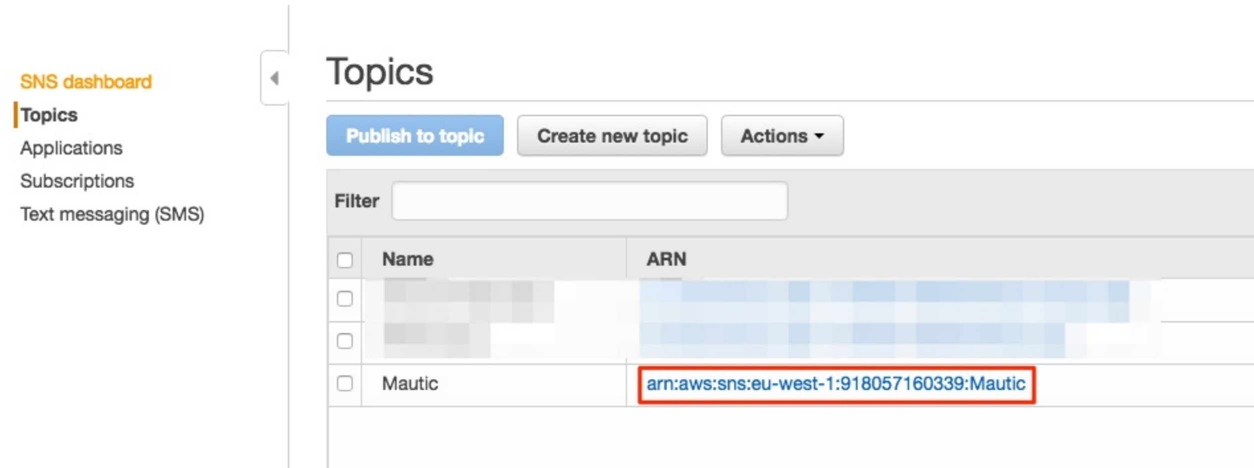
Mautic supports the bounce and complaint management from Amazon Simple Email Service (Amazon SES).

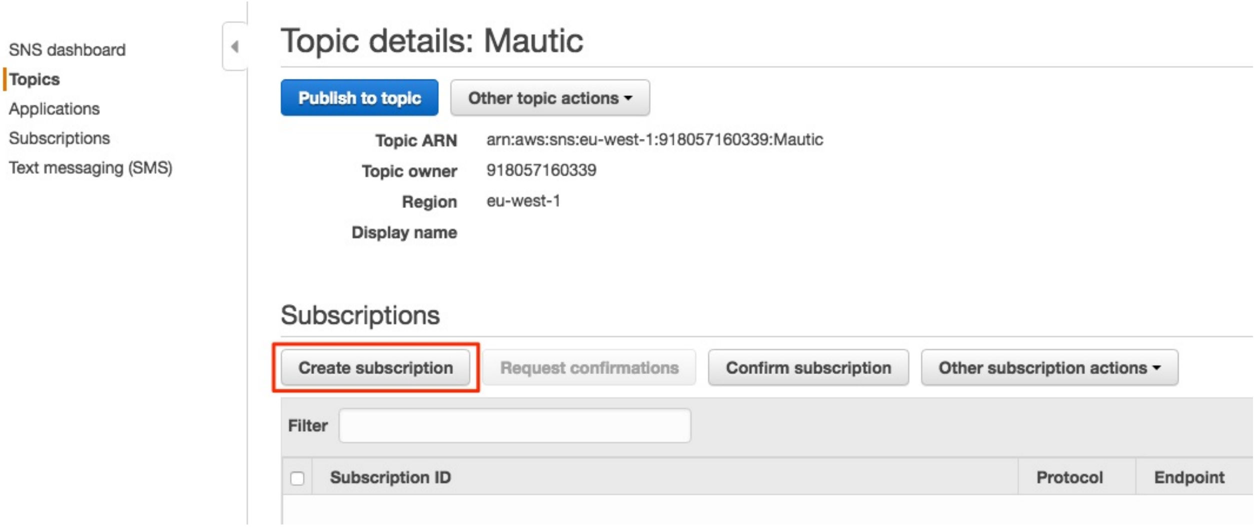
1) Go to the Amazon Simple Notification Service (SNS) and create a new topic



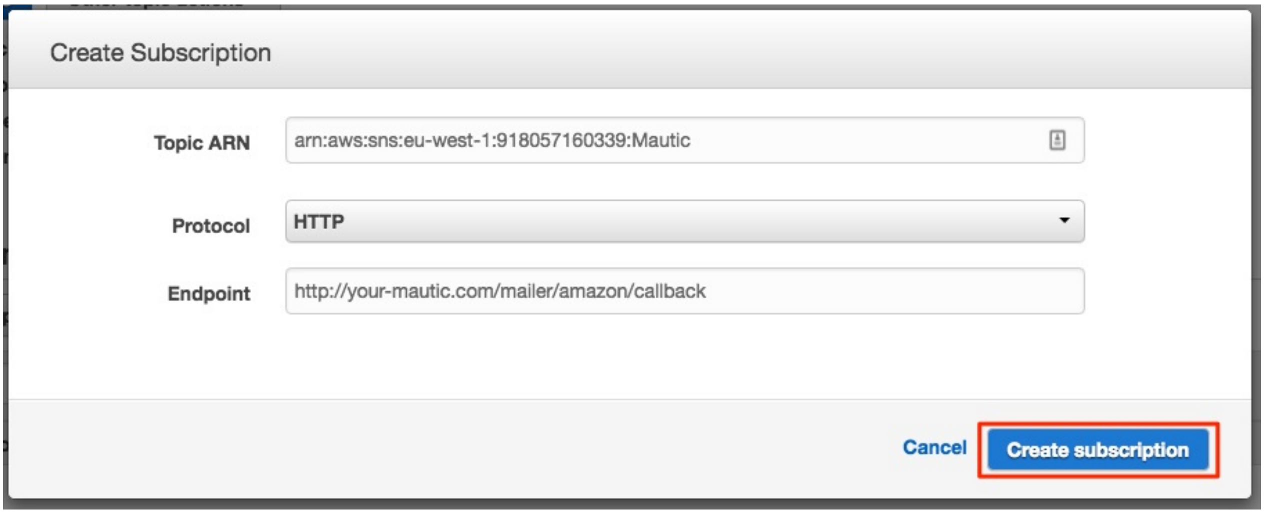


2) Click on the newly created topic to create a subscriber





3) Enter the url to the Amazon webhook on your Mautic installation. It should usually be your mautic URL followed by `/mailer/amazon/callback`

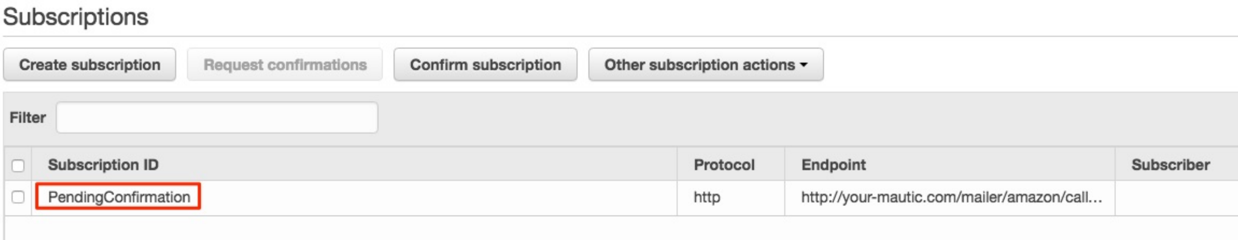


4) The subscriber will be in the pending state till it is confirmed. AWS will call your Amazon webhook with a SubscriptionConfirmation request including a callback url. To confirm Mautic will send a request back to this callback url to validate the subscription. Therefore make sure your Mautic installation is allowed to connect to the internet, otherwise the subscription will remain in the pending state and won't work. If your webhook is HTTPS, you also need to make sure that your site is using a valid SSL certificate which can be verified by Amazon.

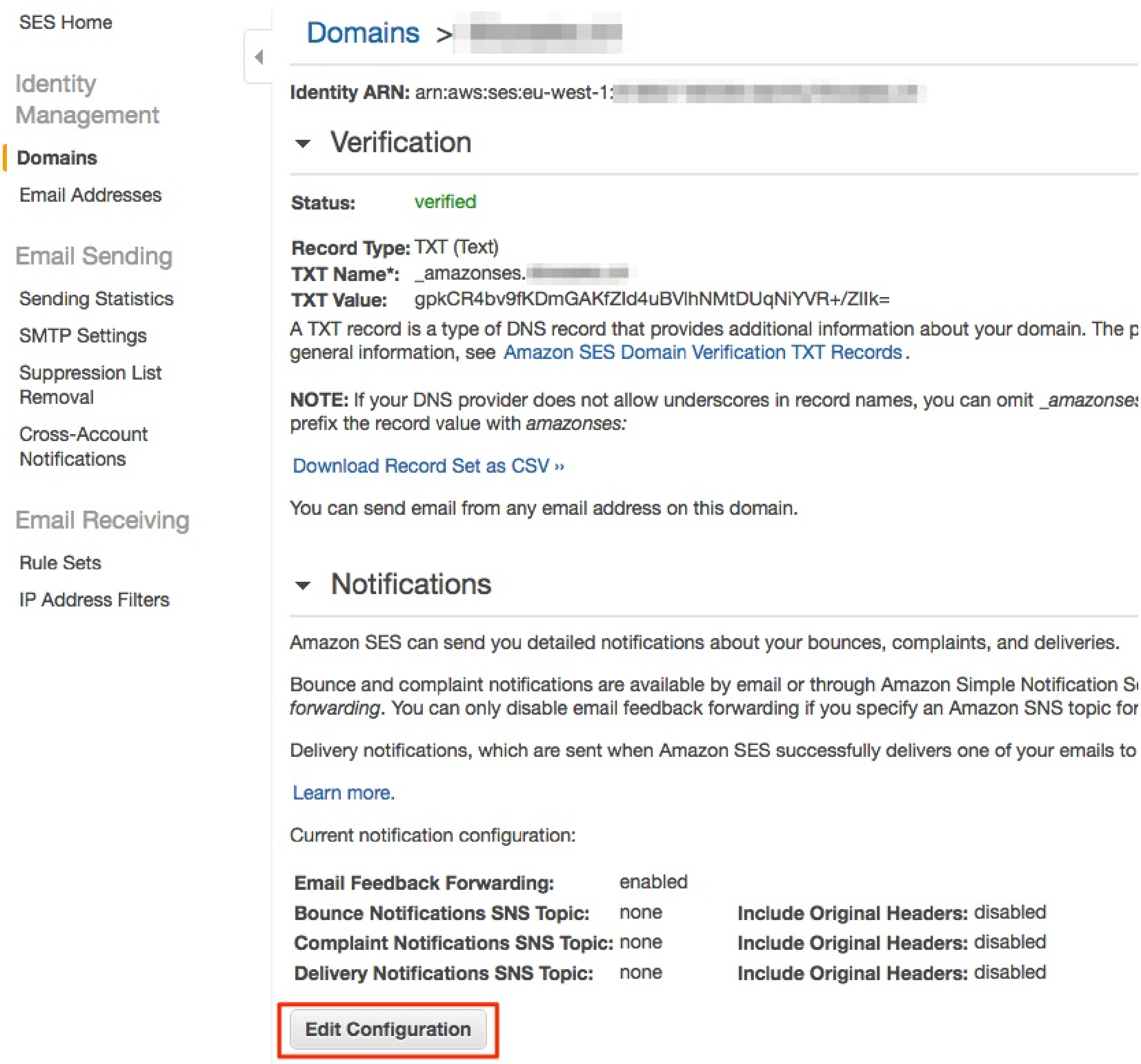
Check the logfile for more information. If you are having problems getting the subscription out of the pending state, it may also help to configure the topic's "Delivery status logging" settings, so that delivery status (at least for HTTP/S) gets logged to CloudWatch. Then you can visit the Logs section of the CloudWatch Management Console and see the exact details of delivery failures. For example, an invalid SSL certificate might result in an event like the following appearing in the CloudWatch logs:

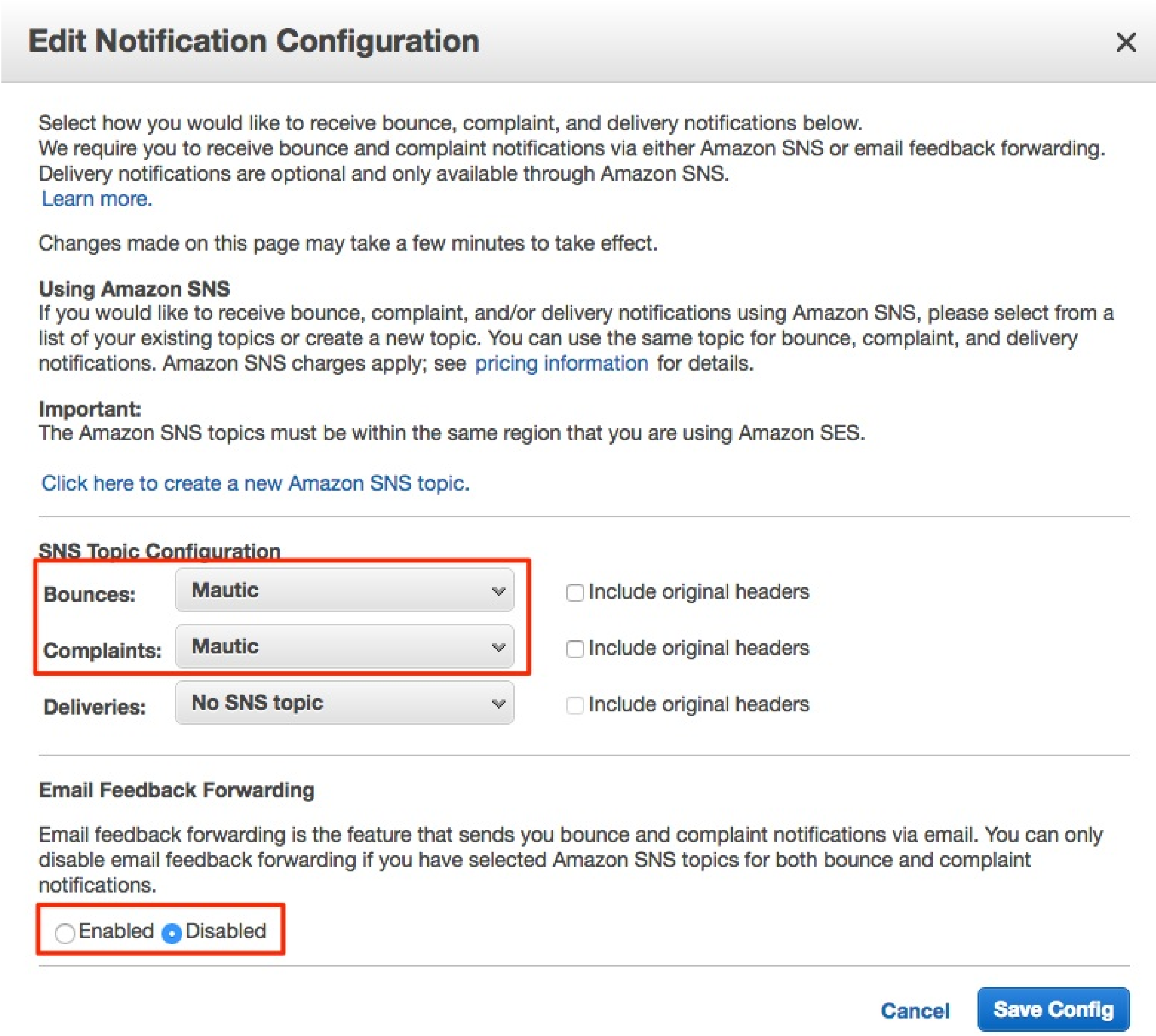

```
{
    "notification": {
        "messageId": "337517be-f32c-4137-bc8d-93dc29f45ff9",
        "topicArn": "arn:aws:sns:eu-west-1:012345678901:Mautic",
        "timestamp": "2019-05-31 15:34:13.687"
    },
    "delivery": {
        "deliveryId": "a5dab35d-83f9-53c3-8ca6-e636c82668d4",
        "destination": "https://my.mautic.site/mailer/amazon/callback",
        "providerResponse": "SSLPeerUnverifiedException in HttpClient",
        "dwellTimeMs": 42266,
        "attempts": 3
```

```
    },
    "status": "FAILURE"
}
```



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

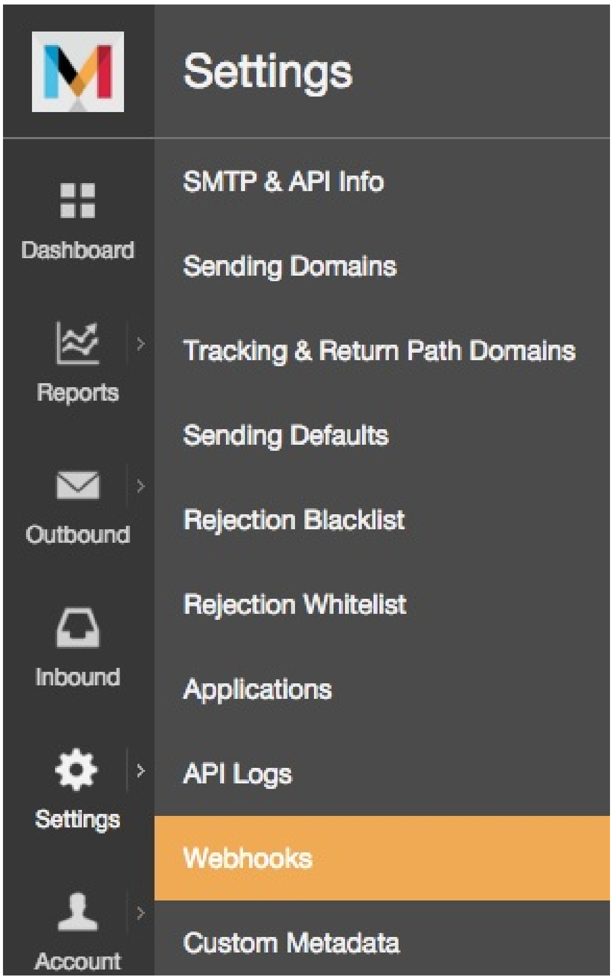




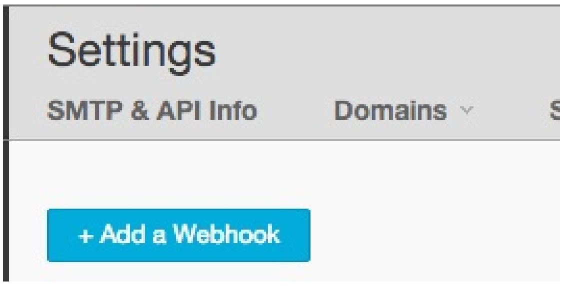
Mandrill Webhook

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

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



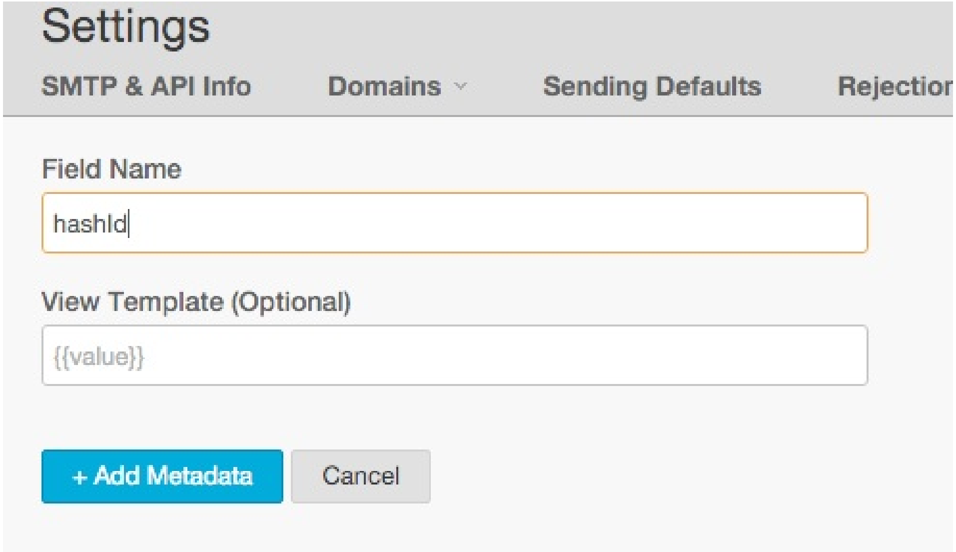
2) Click Add a Webhook

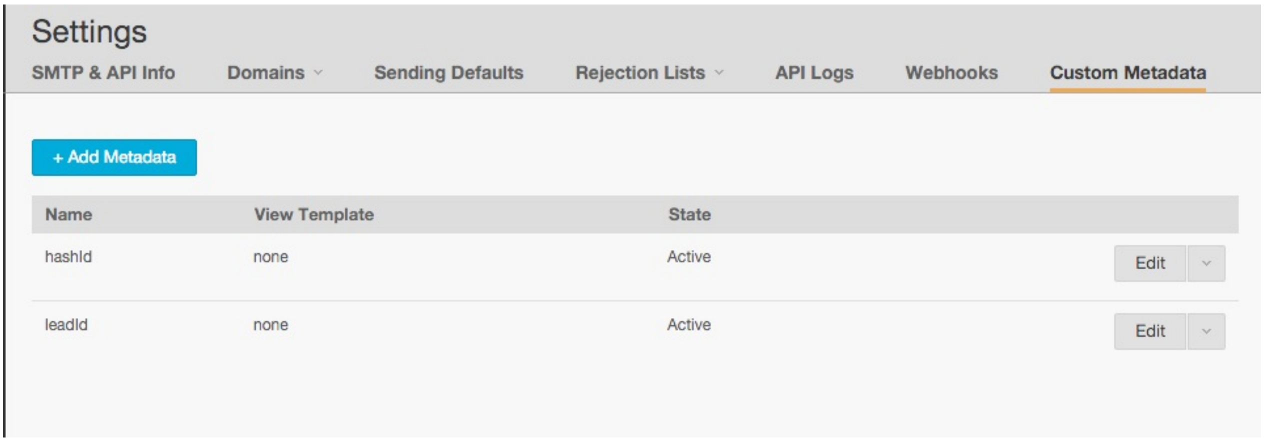


3) Mautic 1.2.2 supports the following webhooks: Message is Bounced, Message is Soft-Bounced, Message is Rejected. As of 1.2.3, Message is Marked as Spam and Message Recipient Unsubscribes will be supported.

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`

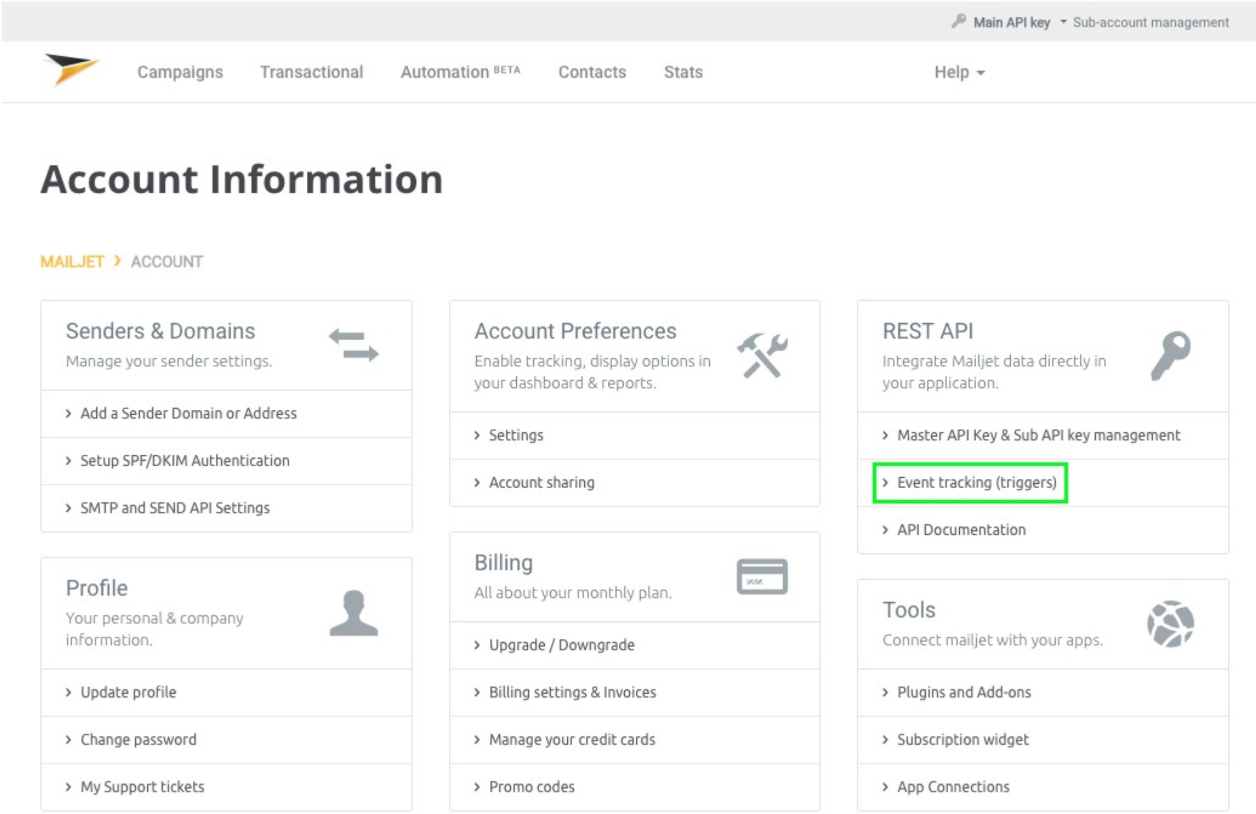




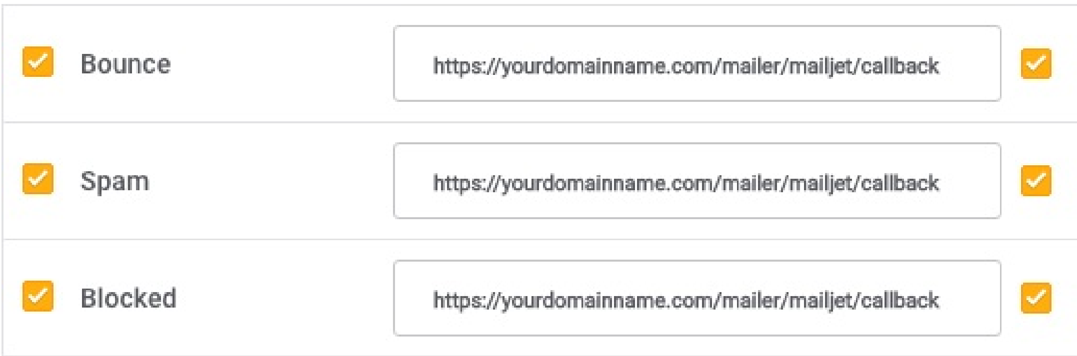
Mailjet Webhook

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

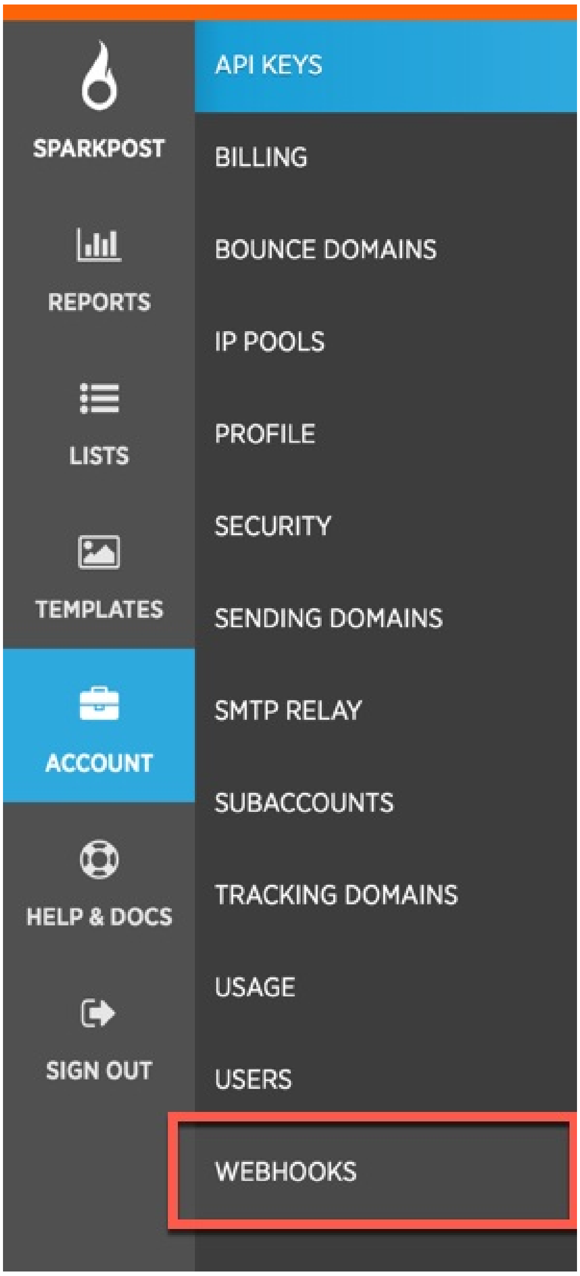


3) Mautic 2.2.0 supports the following webhooks: Message is Bounced, Message is Blocked, Message is Spam.

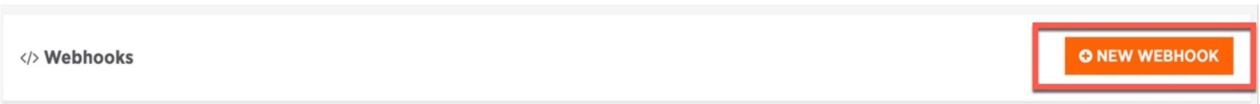
4) Fill in the URL boxes as `http://your-mautic.com/mailer/mailjet/callback` .

Sparkpost Webhook

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

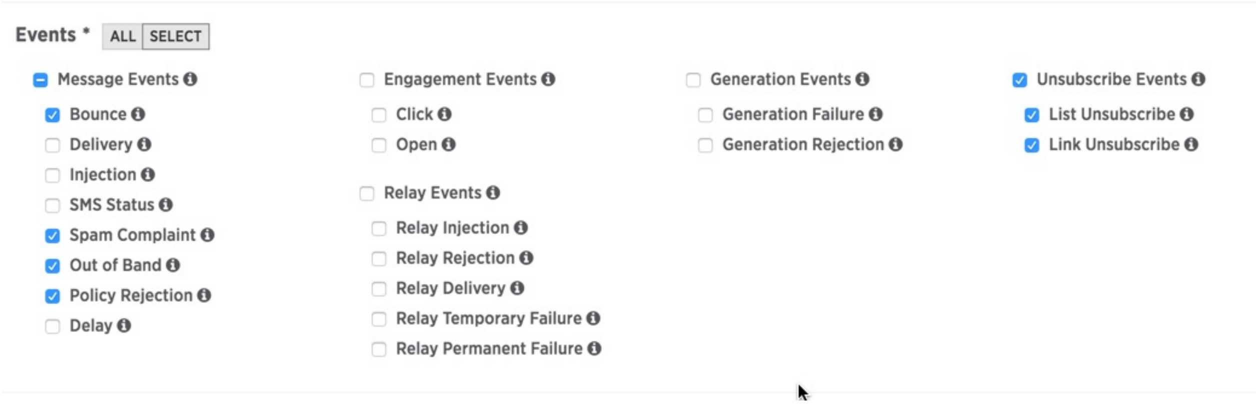


2) Click the New Webhook button top right



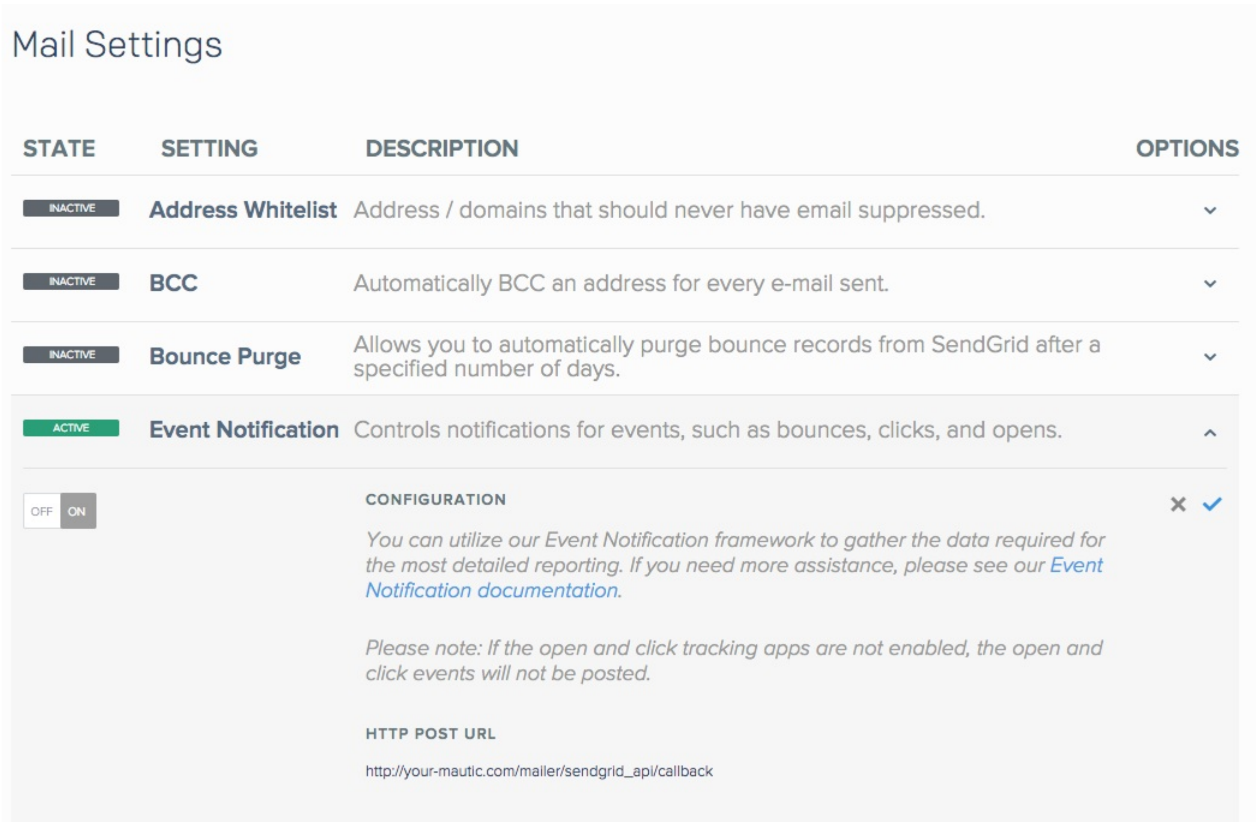
3) Fill in the Target URL as `http://your-mautic.com/mailer/sparkpost/callback`

4) Select the following Events



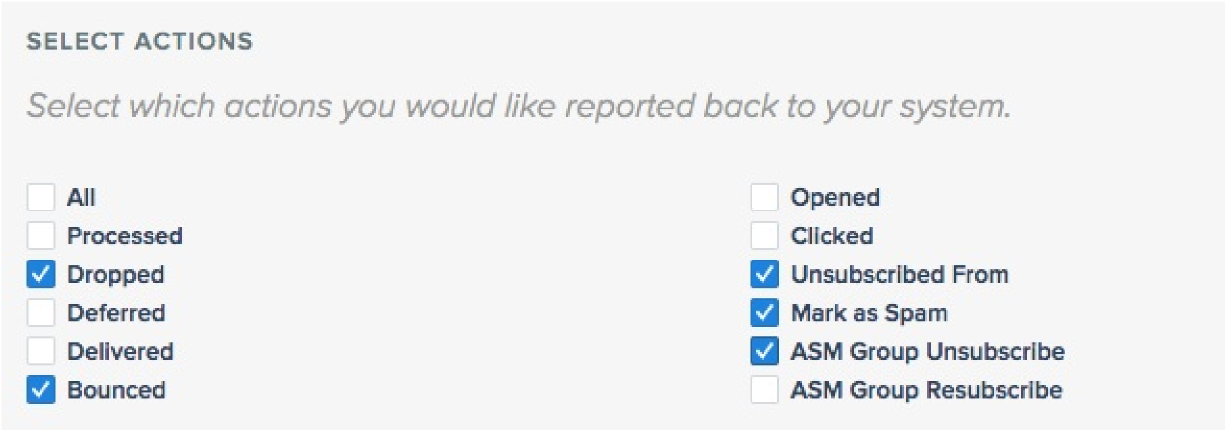
SendGrid Webhook

1) Login to your SendGrid account and go to Settings -> Mail Setting -> Mail Settings

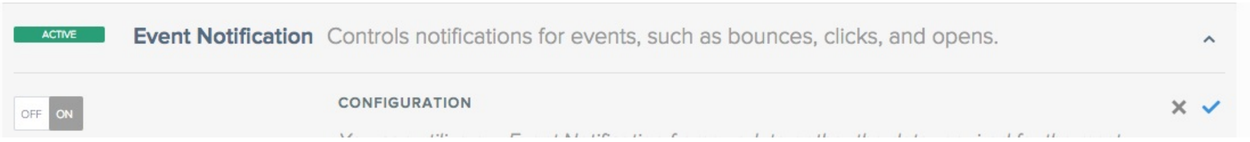


3) Fill in the Target URL as `http://your-mautic.com/mailer/sendgrid_api/callback`

4) Select the following Events



5) Save setting (on the right side of "Event Notification" row:



Contact Replies

Setup

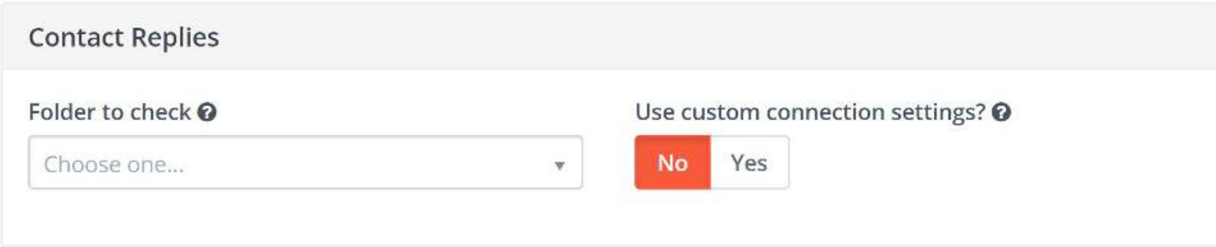
Contact Replies were added in Mautic 2.12.0. To use it you must have access to a non-Google or Yahoo email IMAP server as they will overwrite return paths.

To use the Monitored email feature you must have the PHP IMAP extension enabled (most shared hosts will already have this turned on).

Configure all Mautic sender/reply-to email address as send copy to to one single inbox (the most of the email providers support this feature in their configuration panel).

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.

Then go to the Mautic configuration and setup the inbox to monitor replies.

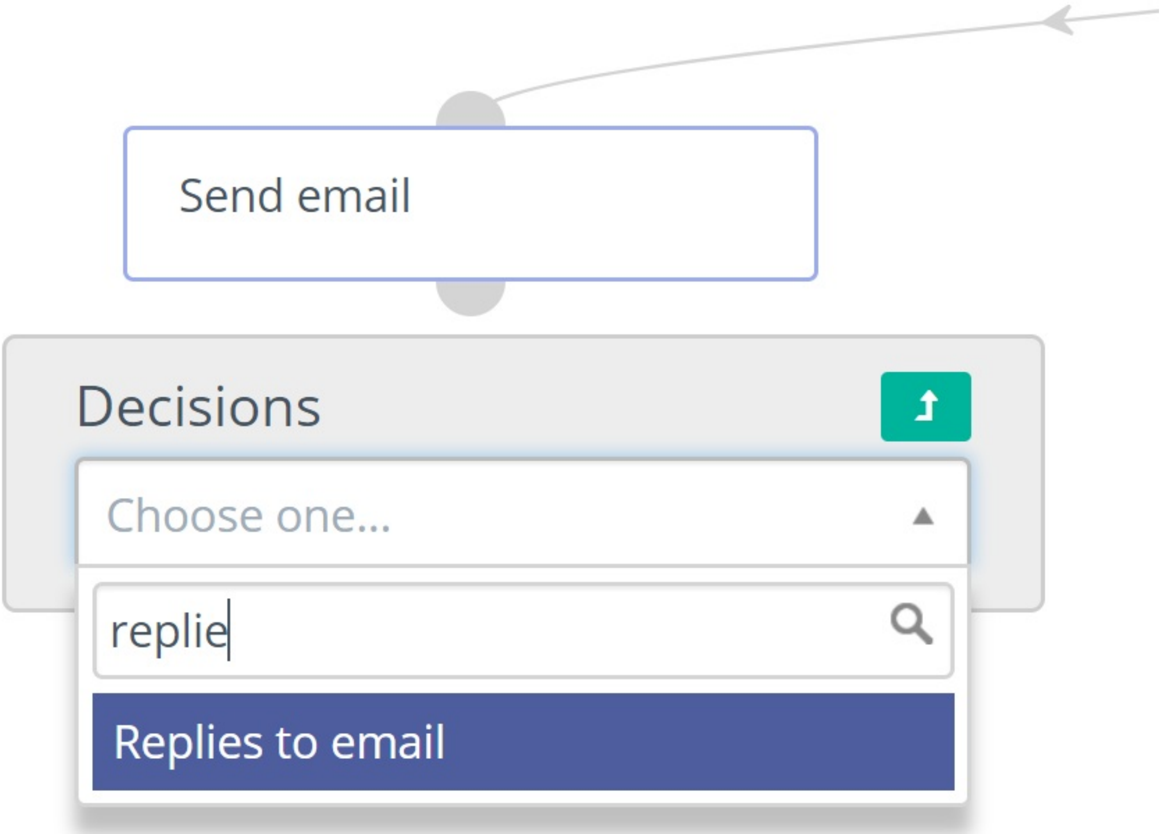


To fetch and process the read messages reply, run the following command:

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

Usage

Contact replies use with campaigns as decision after send email. Mautic tried read inbox, parse messages and find reply from contact. Then go to positive path immediately after reply exist.


Send email
Decisions
Choose one...
replie
Replies to email

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 their 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.

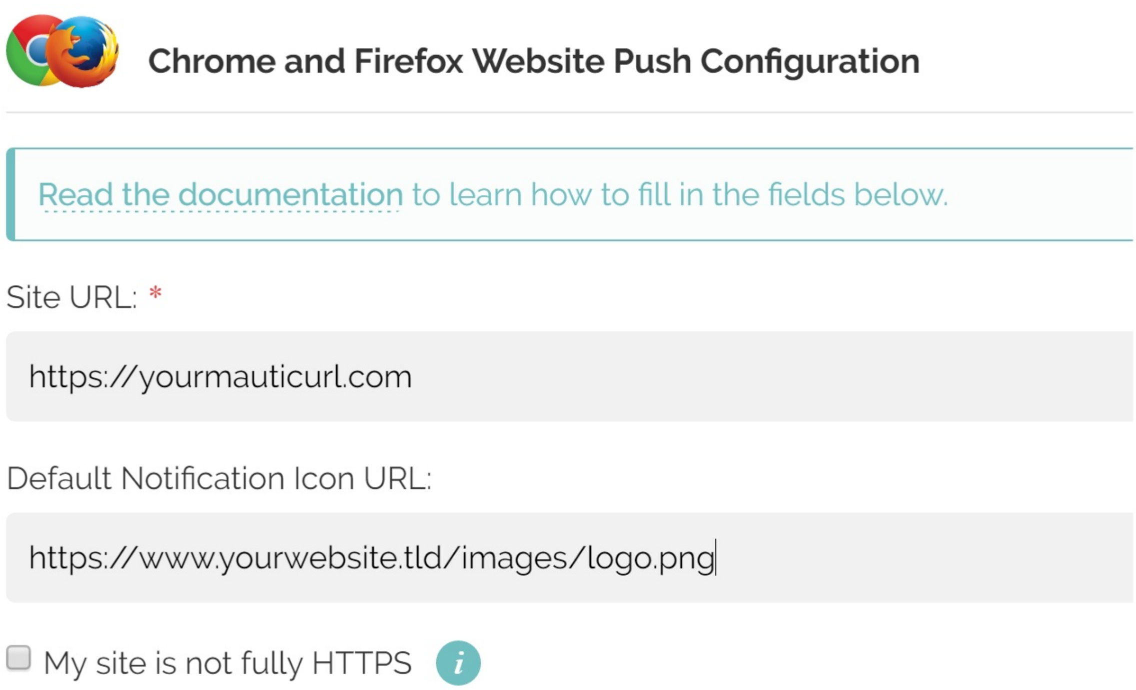
For more information see One Signal documentation

Setup

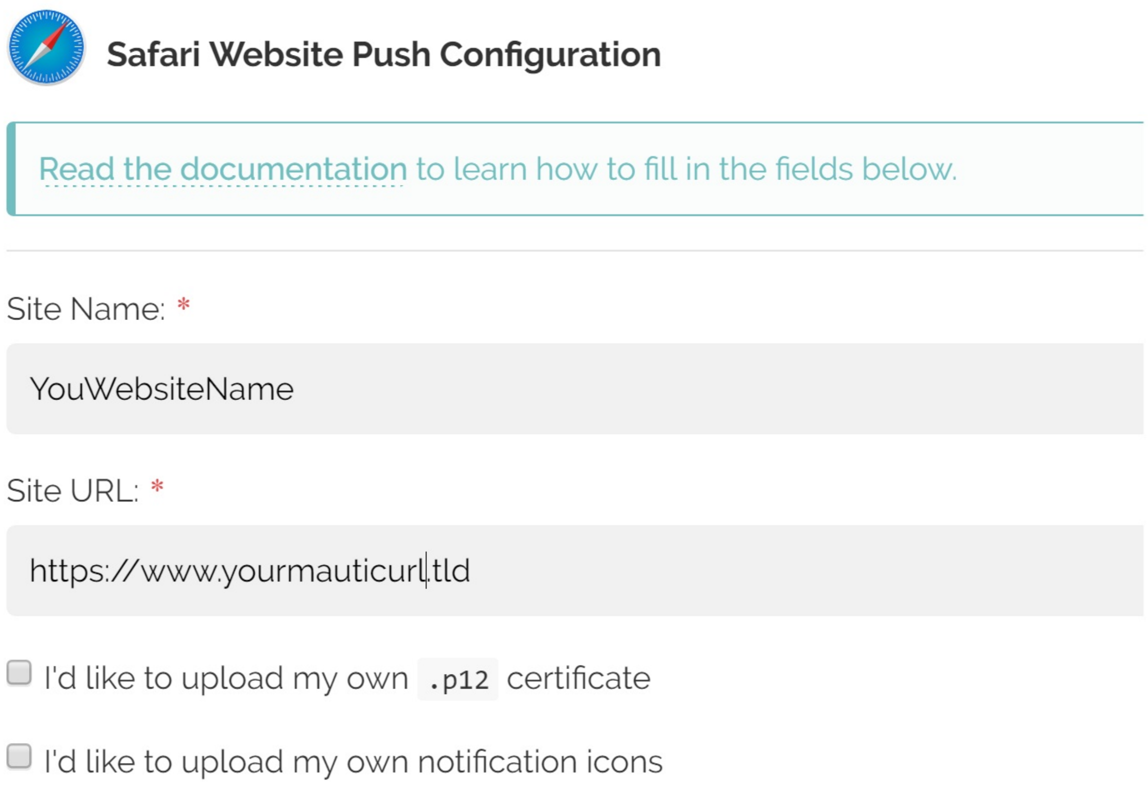
1. Create One Signal account and app

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

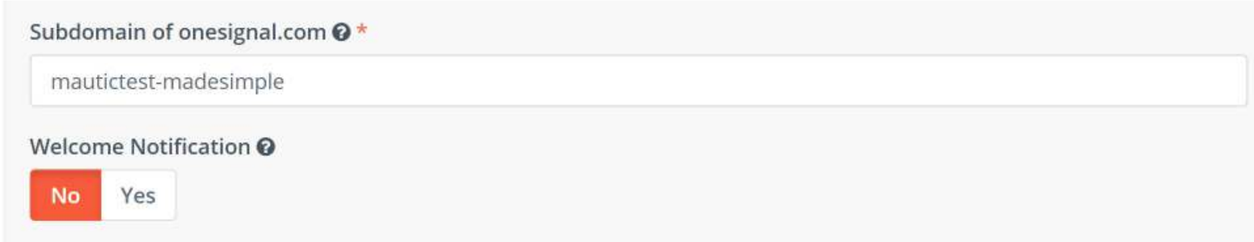
gcm_sender_id

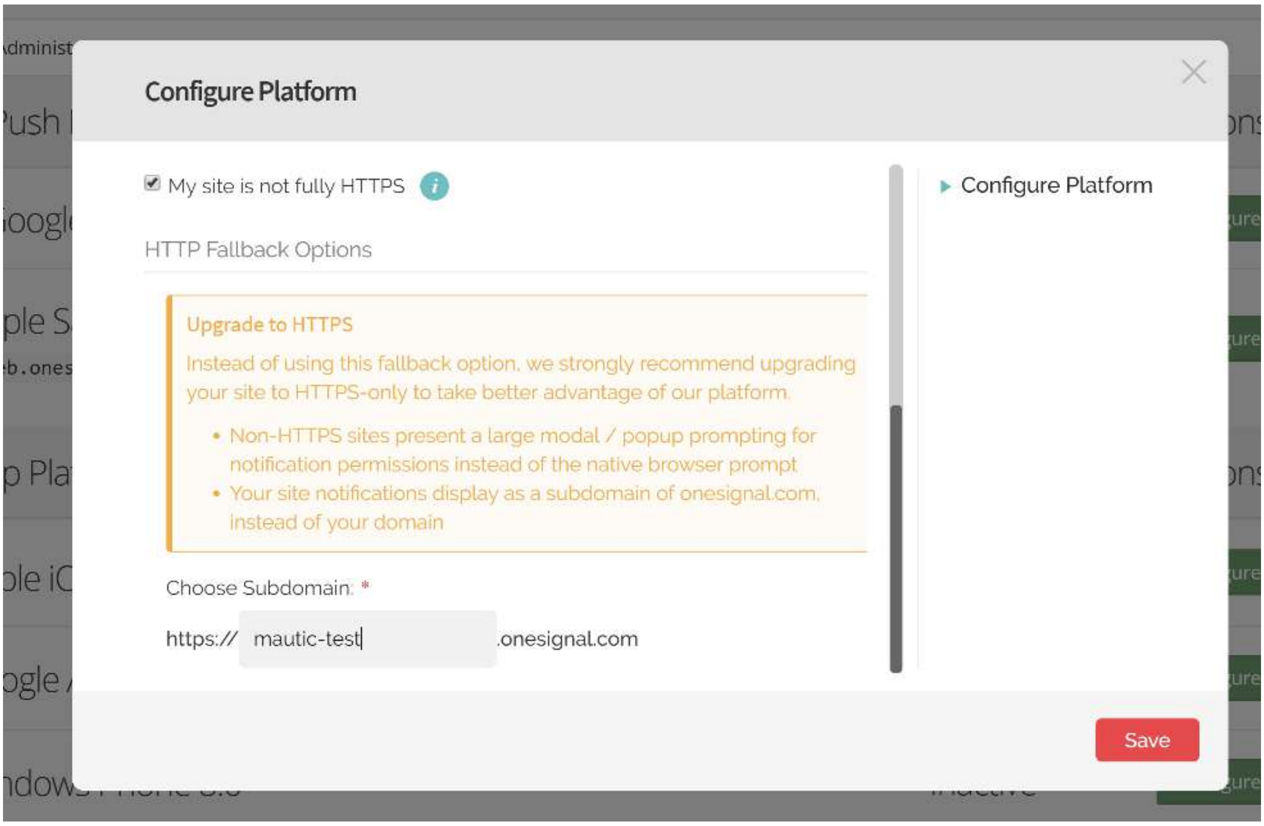
Option gcm_sender_id is a shared key used for push notifications. Use default value 482941778795. Previously it required your own key. Due backwards compatibility is editable (for older Mautic).

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.

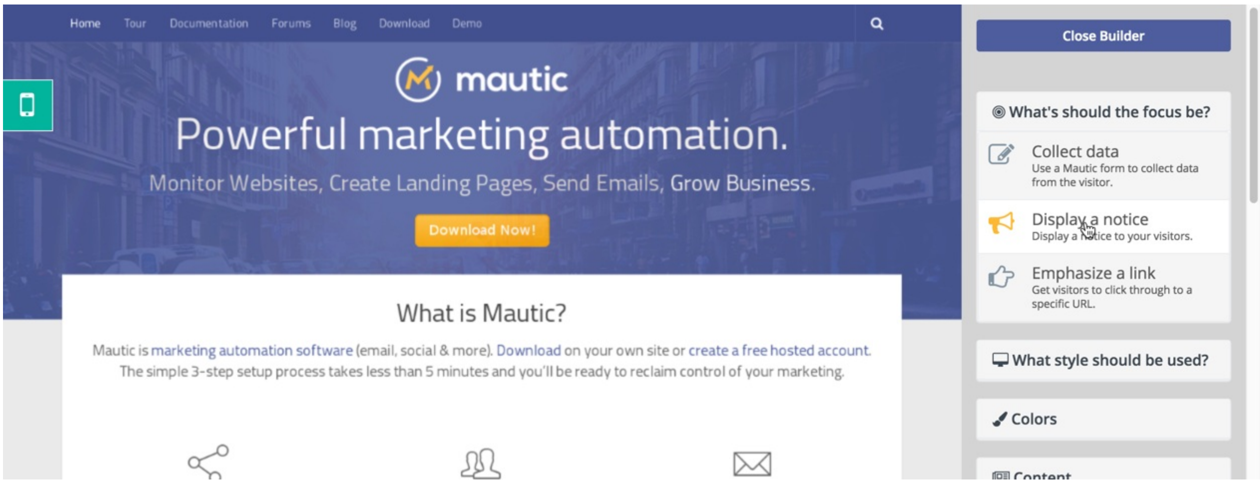
Focus Items are listed under the Channels menu.

Creating a Focus Item

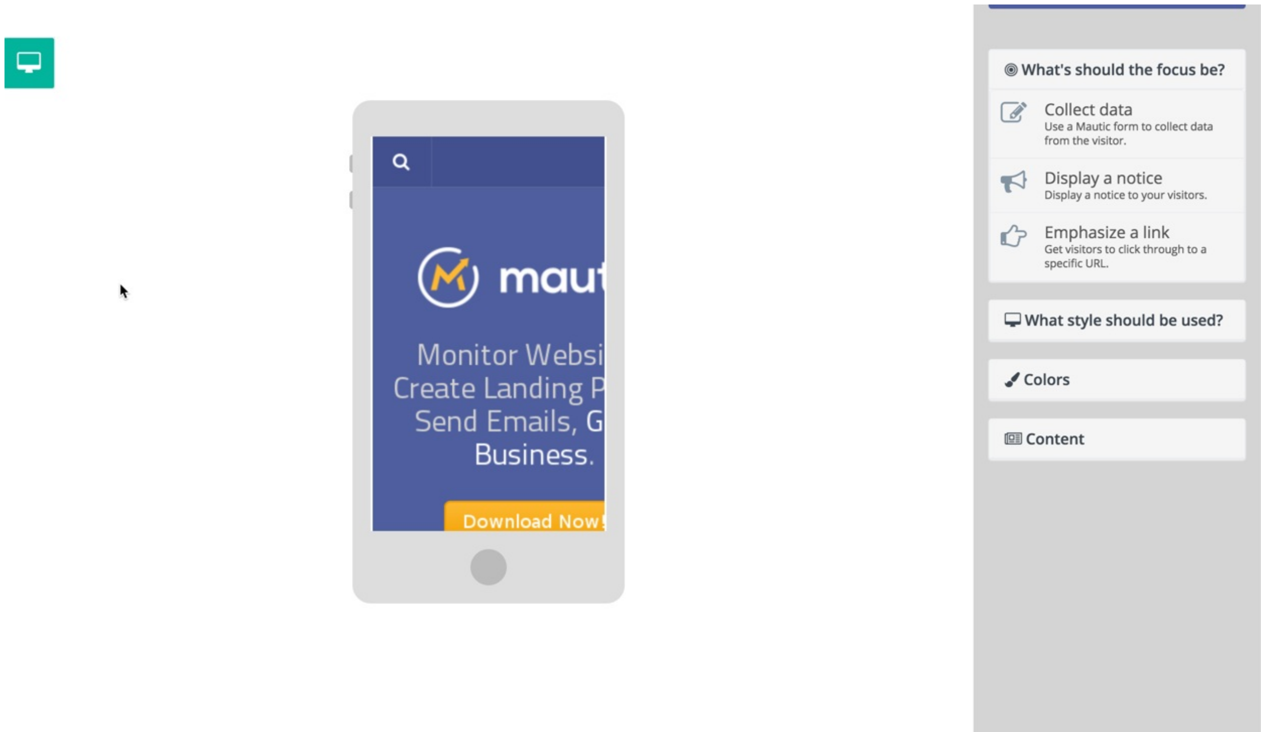
When creating a focus item, you'll see that there is a place to enter a website. This is currently integrated into a service offered by mautic.com to generate a snapshot of the given website to use a preview when building the focus item. If the website is a very complex website - the snapshot may not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



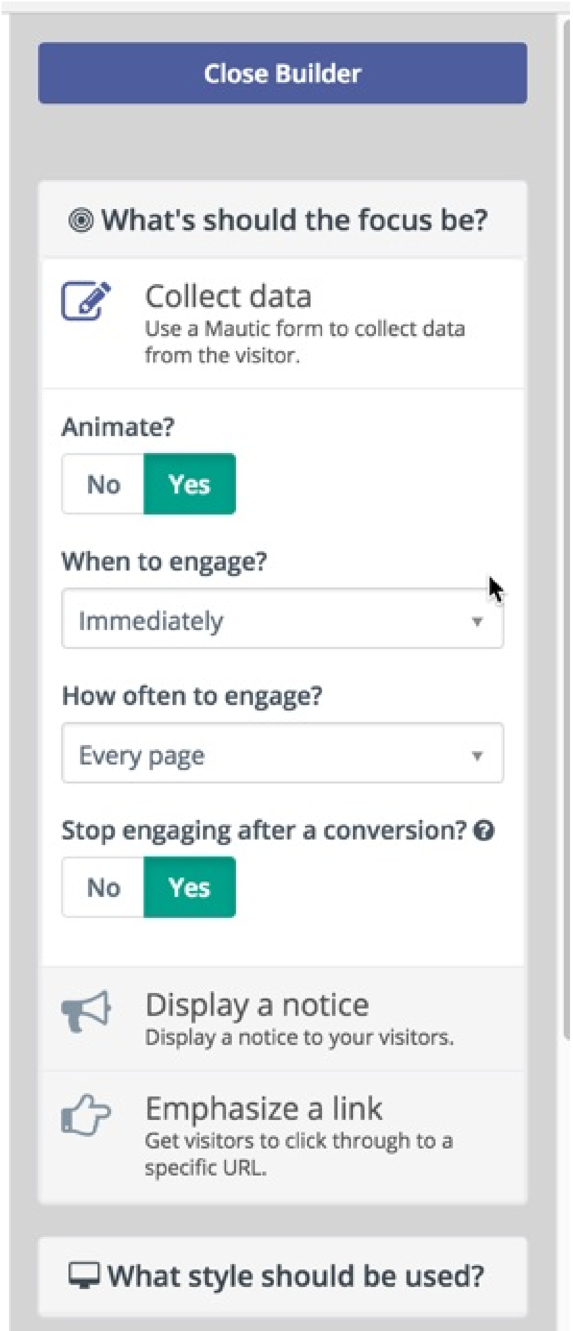
On the left, you'll see a button to switch between mobile and desktop views. A mobile snapshot is also attempted - it may not match your website exactly due to the snapshot process but it should at least give you the general look. On the right is the builder toolbar.



Focus/Goal

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

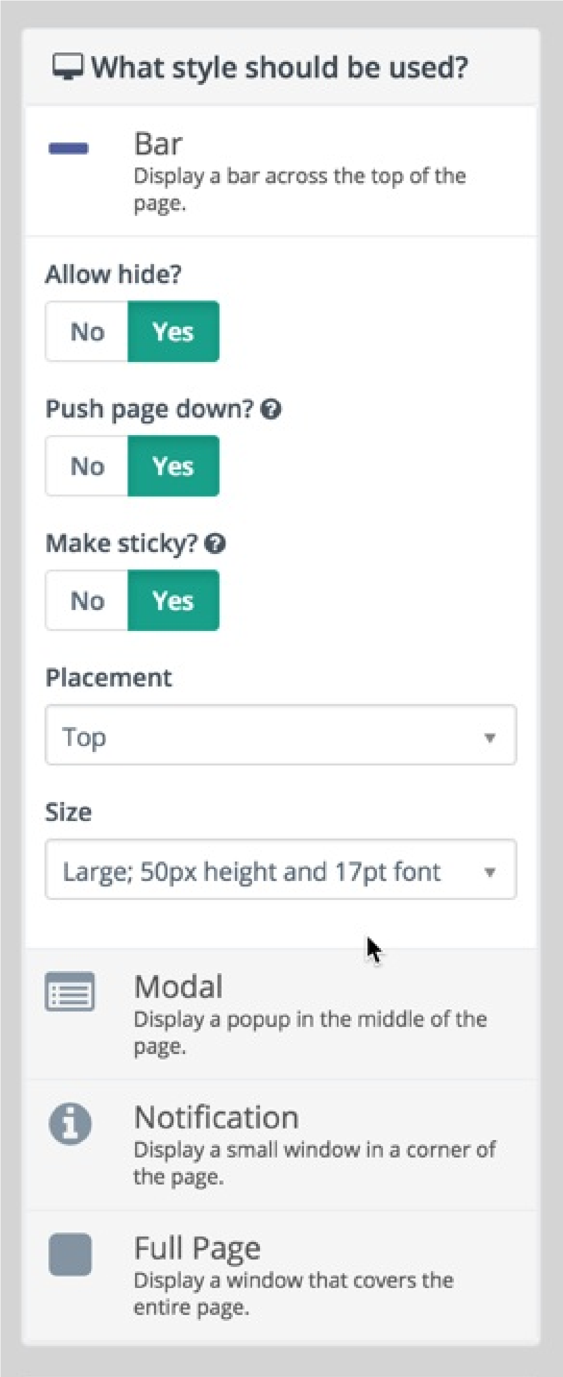
1. Collect data - will use a Mautic form in the output as the content. Note that it should be a very simple form (One or or two inputs) as there is very little room to work with in some of the styles. But this is great for capturing emails for a newsletter signup.
2. Display a notice - information only 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? - determines whether the focus item animates into view or just appears.
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

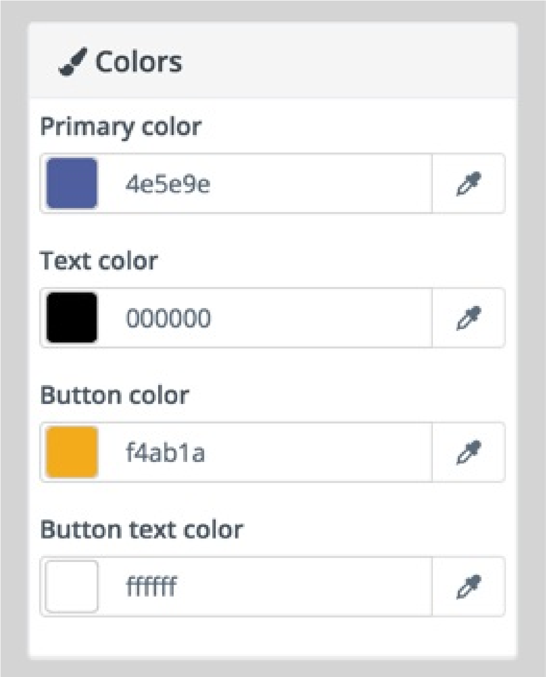


There are four styles supported -

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.

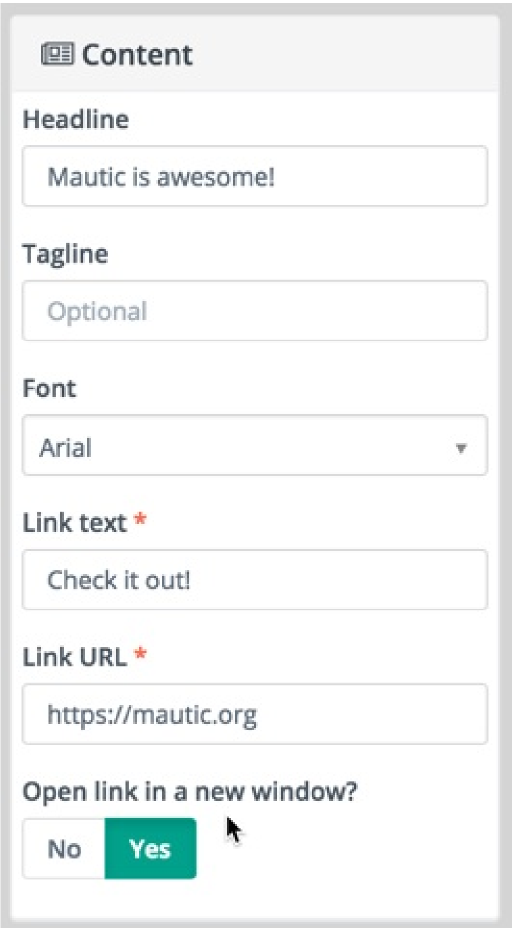
Each style has its own settings such as position, size, sticky, etc.

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

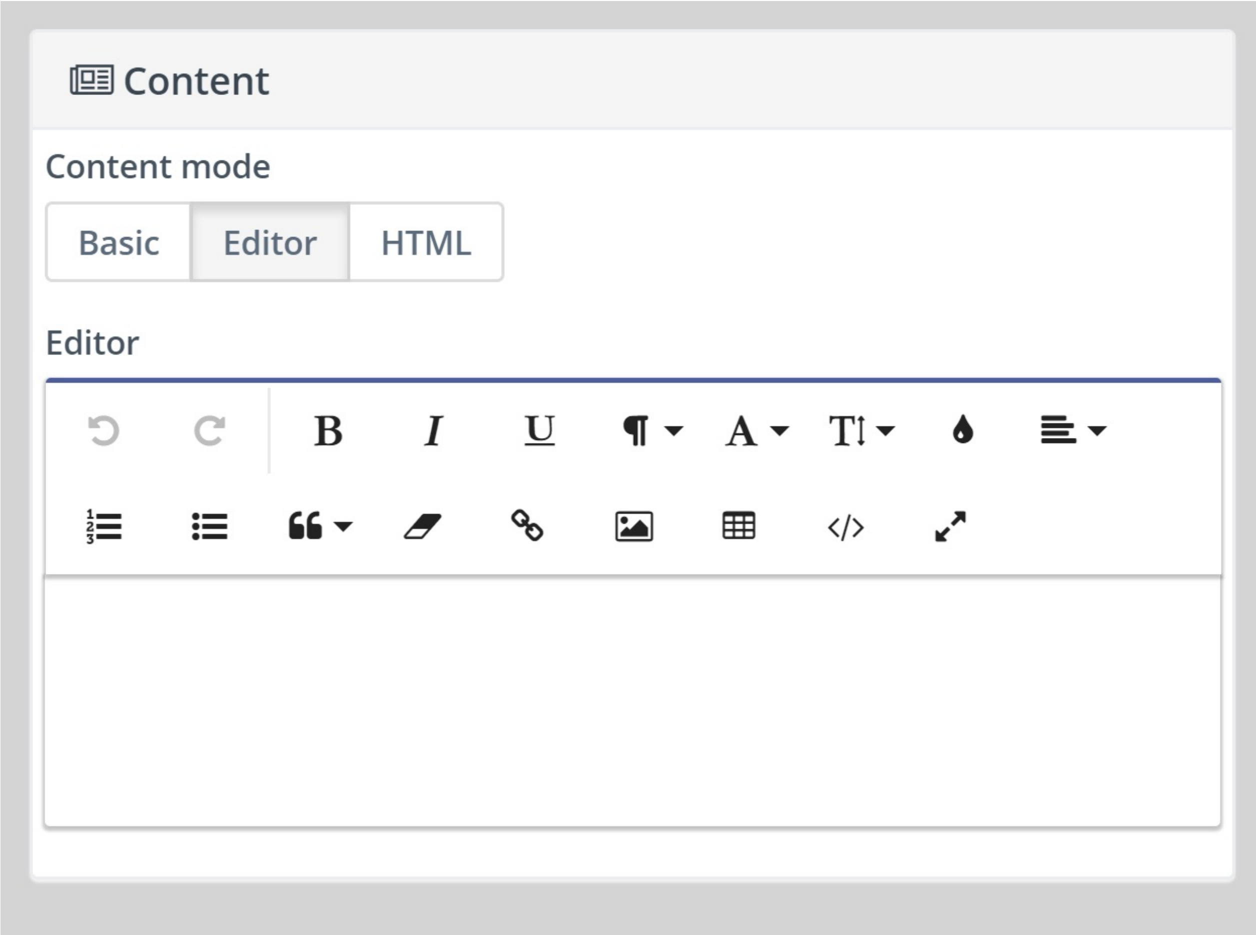


Again this will vary based on the selected focus/goal and style is chosen. Some support a headline and a tagline while some support only a headline due to space constraints. If the goal is to collect data, a list of forms will be available to choose from. Remember that the form should be simple.

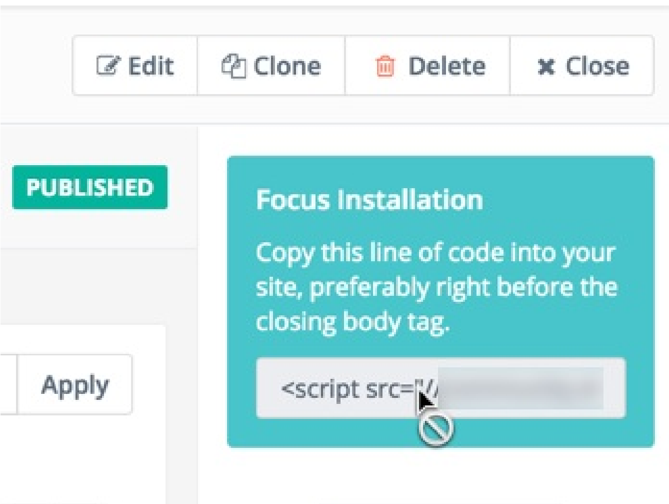
For Advanced Users

Content Mode

A new section called ‘content’ has been added to the builder for focus items that enables you to format content in basic, editor or html mode. This opens the door for even more creativity when engaging visitors to your site.



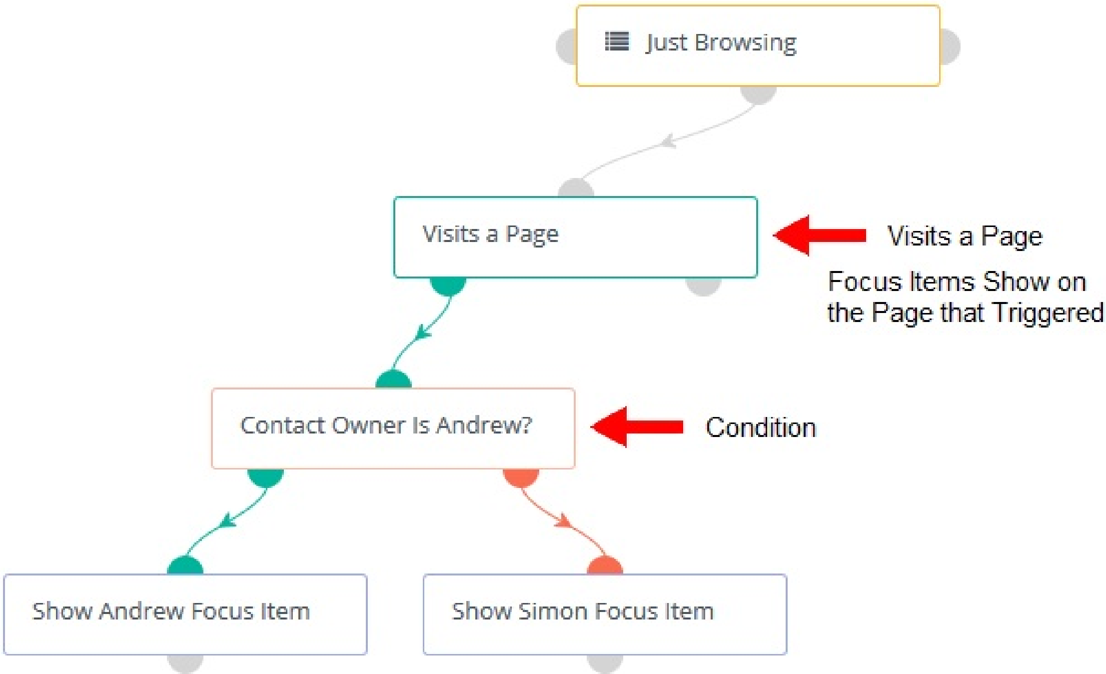
Inserting Focus Items Into a Website



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.

Focus Items in Campaigns

Focus items can be shown through a campaign action in response to a page visit. In order to do this, the page(s) you wish to show the focus item on must have the Mautic tracking script and the focus item should **not** be manually inserted. The focus item action depends on a page visit, which means **you have add it just after, or after a condition that follows a `Visits a page` decision**. The focus item will only show if it meets its own requirements for showing, for example the `How often to engage` setting will be respected.


Just Browsing
Visits a Page
Visits a Page
Focus Items Show on the Page that Triggered
Contact Owner Is Andrew?
Condition
Show Andrew Focus Item
Show Simon Focus Item

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 text messages from campaigns.

Configure Text Messages

Before you start to send text messages 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. In Mautic, go to *Settings* (cog icon) > *Plugins*.
3. Open *Twilio* plugin and activate it.
4. Copy the *Account SID* from Twilio account and paste it to *Account SID* field in the Twilio plugin configuration.
5. Unlock and copy the *Auth Token* and paste it to *Auth Token* field in the Twilio plugin configuration.
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. Add a *Send Text Message* action 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.

Alphanumeric Sender ID

Alphanumeric Sender ID allows you to send Twilio Programmable SMS messages using a personalized sender name, in supported countries (see International Support for Alphanumeric Sender ID).

Instead of using an E.164 formatted Twilio Phone number for the "From" value, you can use a custom string like your own business' branding.

Note: Additionally, messages sent out using an **Alphanumeric Sender ID can not be replied to directly**.

Alphanumeric Sender ID requirements

Alphanumeric Sender ID is automatically supported on all new upgraded (paid) Twilio accounts. It is not supported for Free Trial accounts.

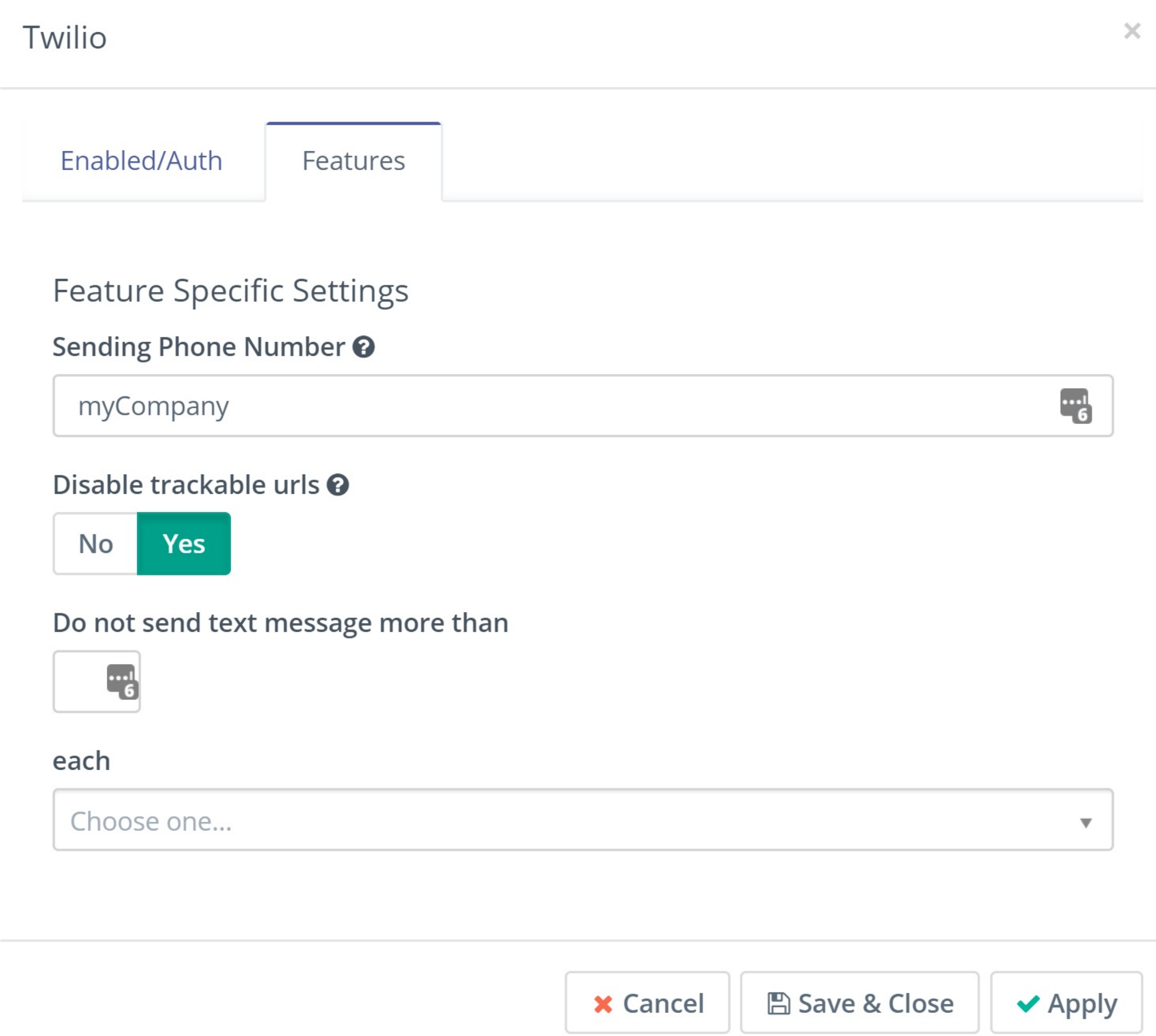
You can validate that Alphanumeric Sender is enabled on your account by following these steps:

1. Login to your account at www.twilio.com.

2. From the left side navigation bar, click Programmable SMS.
3. Click Settings.
4. Verify that "Alphanumeric Sender ID" is set to Enabled.

Send SMS Messages using an Alphanumeric Sender ID with Mautic

Just setup your alias in plugin settings:



Read more info about Alphanumeric Sender ID on Twillio site.

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

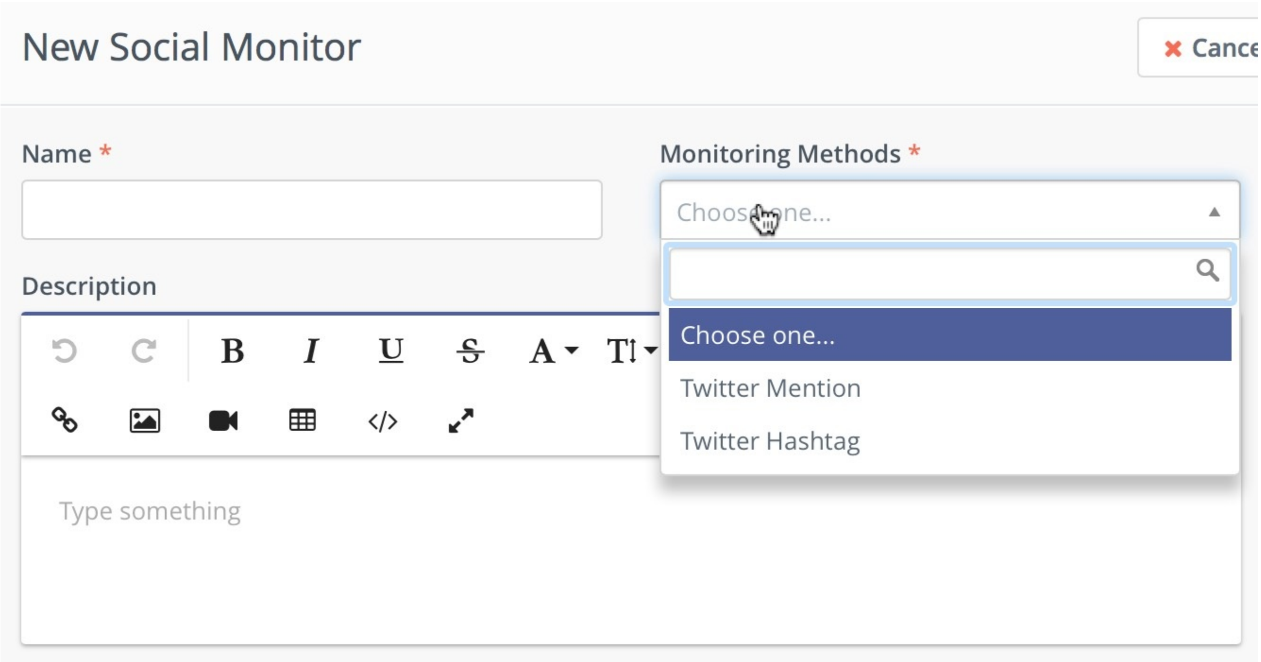
The original idea was that Mautic will search for additional information about a contact in various social platforms. But since the time the social plugins were written, social platforms restricted the API search only to the username.

Social Monitoring

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

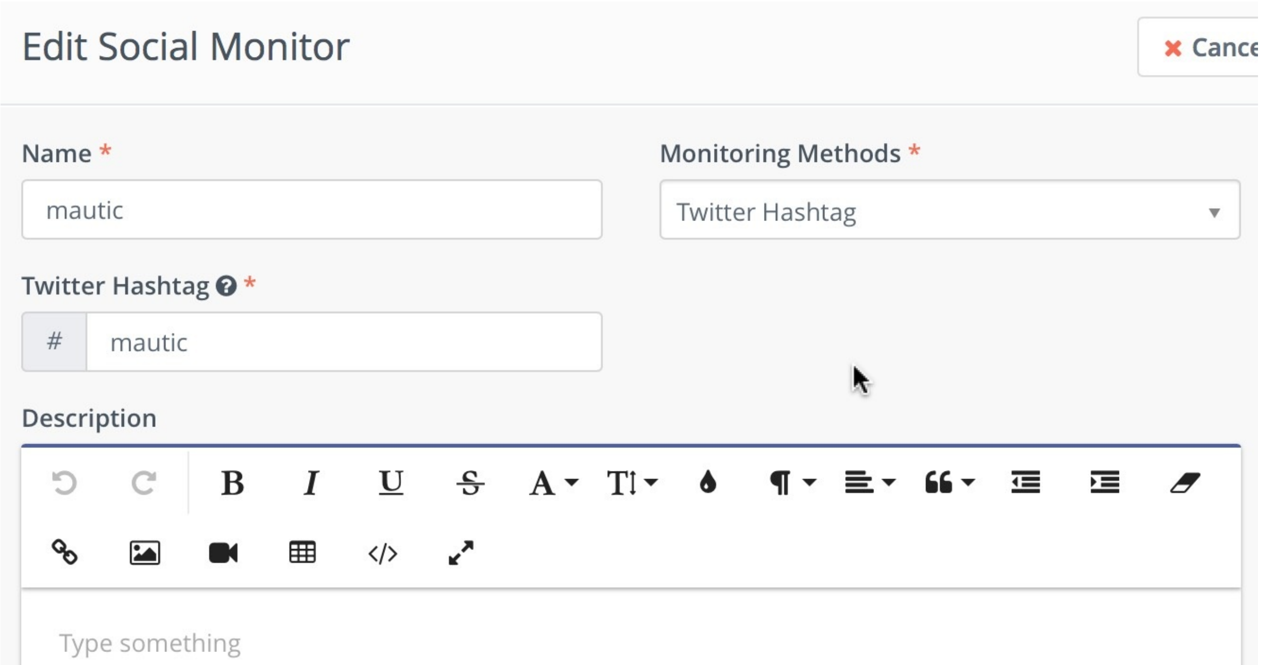
Requirements

- Twitter plugin must be configured.
- `app/console mautic:social:monitoring` command must be triggered periodically. Add it to your cron configuration.



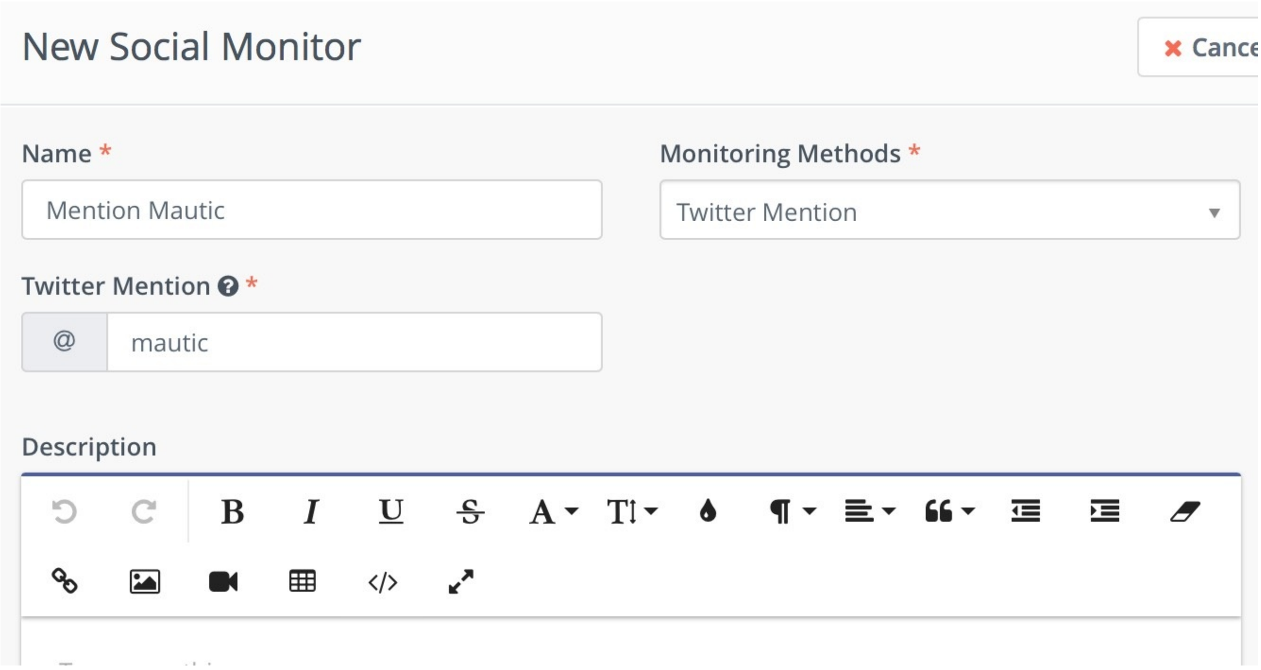
Hashtags

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.

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:

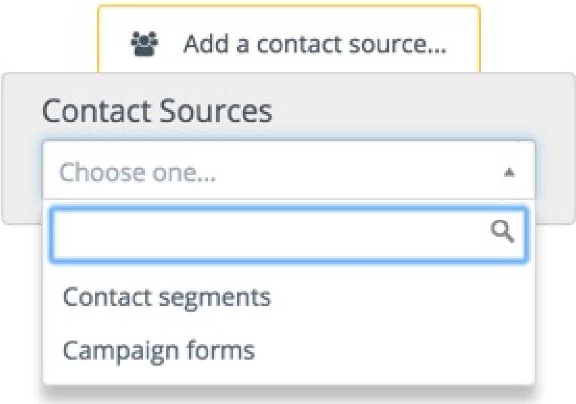
```
php /path/to/mautic/app/console mautic:campaigns:update --env=prod
```

Campaign Builder

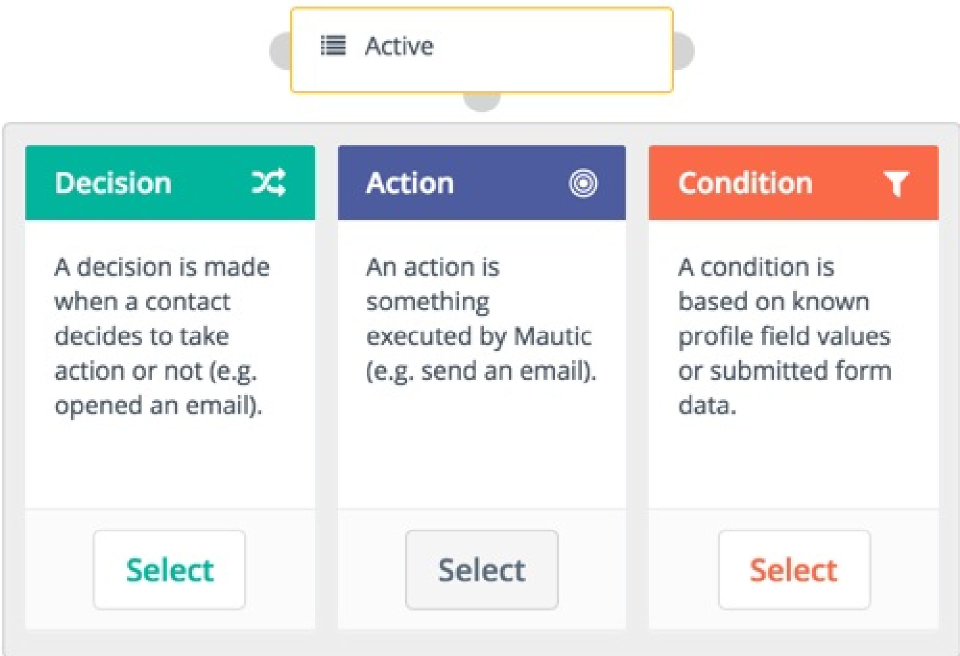
The Mautic campaign builder gives you a blank canvas upon which to build your campaign workflow. The overall interface is clean and simple with easy to use events. These actions, decisions, or conditions can be added through clicking the "anchors" of events.

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.



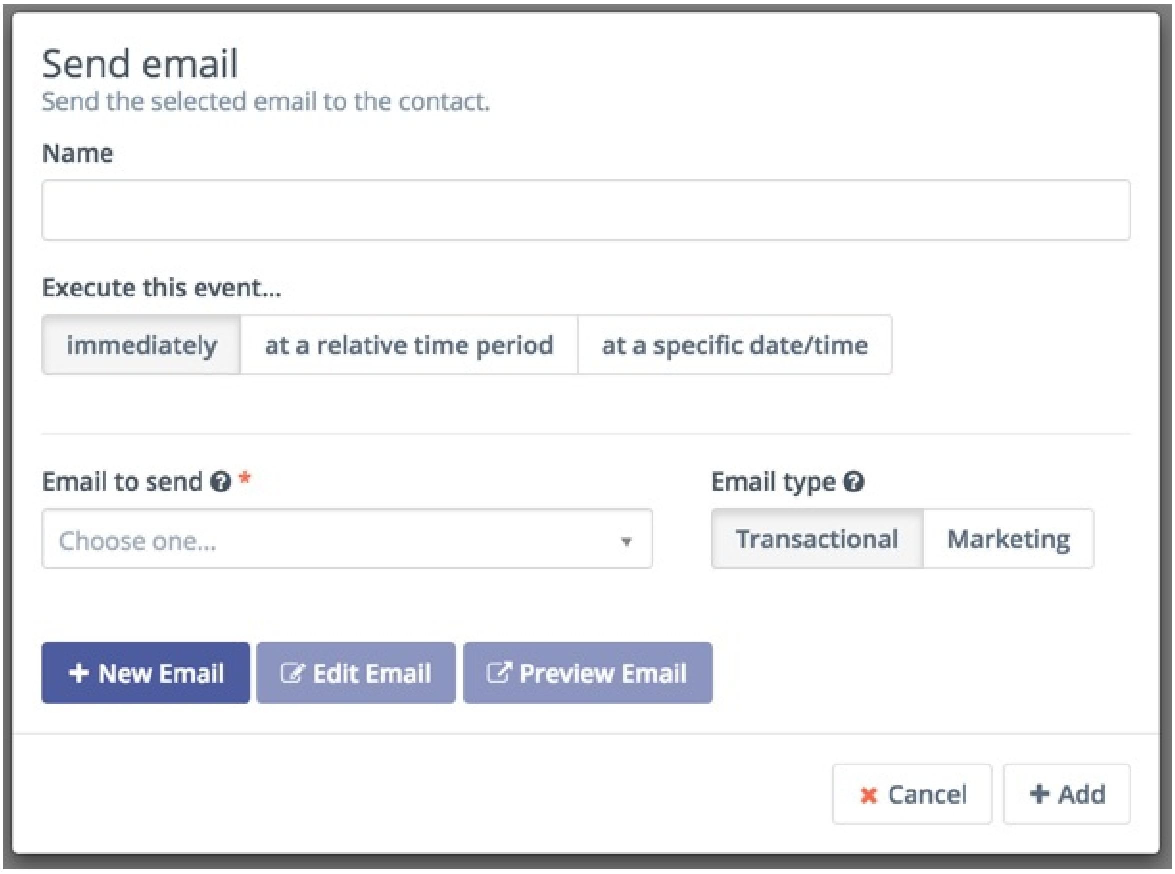
After selecting one or more sources, the next step will be to add one or more actions (most likely), decisions and/or conditions:



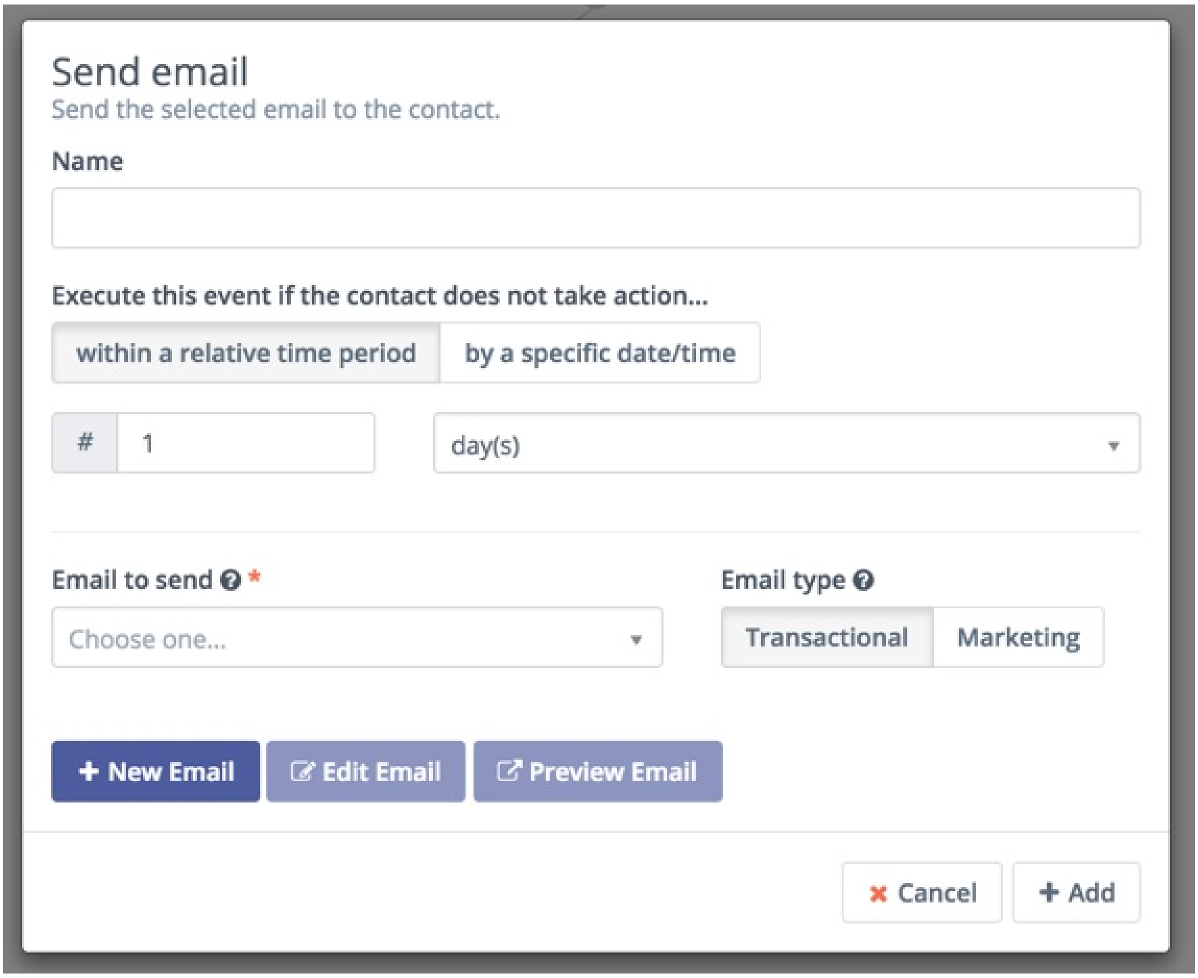
Actions

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.

Usage:

One thing to remember is that campaign conditions are evaluated immediately. So if the date in the field matches the condition, then the positive action is executed. If the date doesn’t match, the negative action is executed. The contact doesn’t kind of “hang around” waiting for the condition to be true.

In order to run campaigns based on a particular date where a contact may or may not be "included" today:

- create a segment with a filter where the date field = TODAY.
- initiate the campaign based on that segment.
- as people move in and out of the segment, the campaign will run.
- you can elimiate the condition since the segment is changing daily.
- note: this will NOT work for an anniversary - only an actual date.

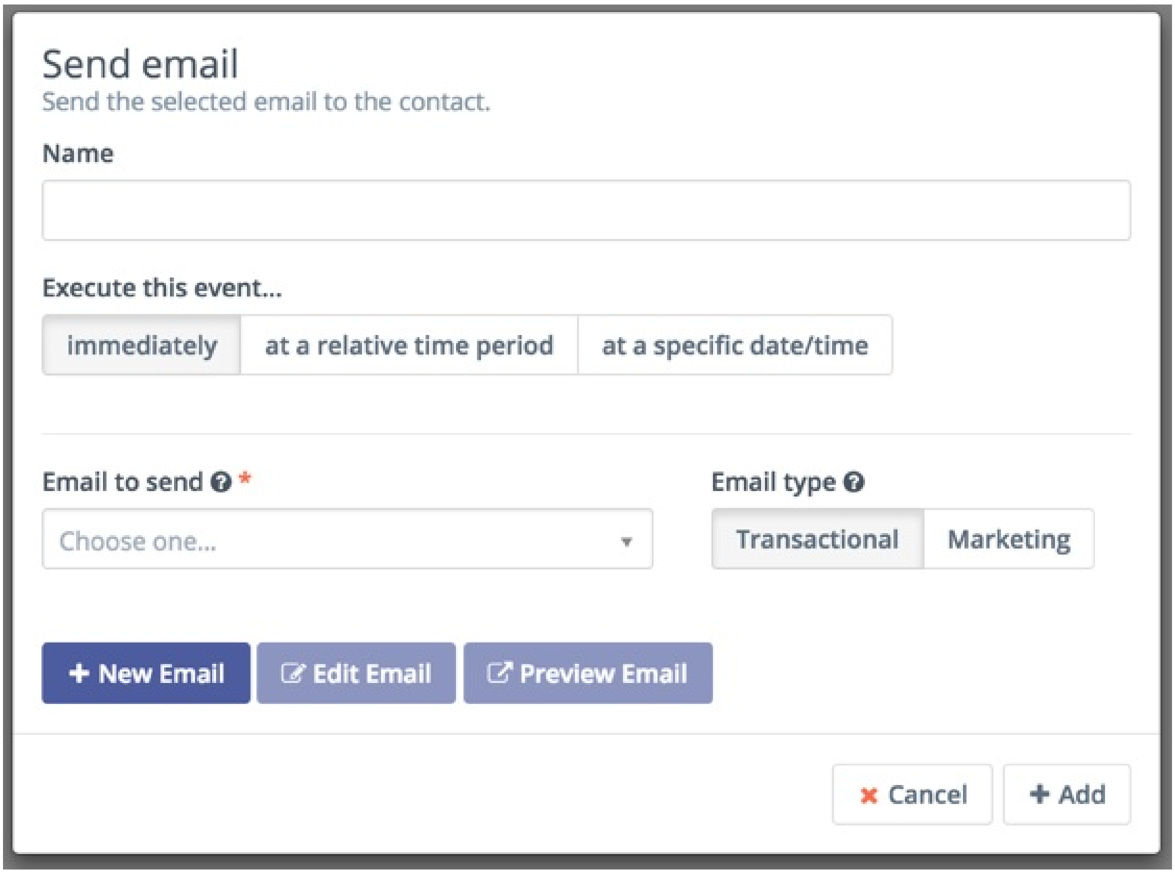
Of course if someone appears again at a later date in that segment because the value of the date is changed, they’ll still only go through the campaign once and hence will NOT be included in the campaign again.

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.

Send email to user

This action will allow you to send email to:

- any Mautic user
- contact's owner
- any email addresses (TO, CC, BCC).

Emails sent through this action will not generate any statistics for contacts nor emails.

The email tokens will get populated with the real values including contact field values. But the email hash is bogus so the links like unsubscribe won't work correctly. It's similar behaviour like when a user sends itself a test email.

Send a Webhook

Action Send a Webhook with GET, POST, PUT, PATCH, DELETE, TRACE request support (curl). It was created based on GitHub discussion. Return true if page status code is 200/201. Data and headers values support contact field tokens (`{contactfield=firstname}` etc.).

Mautic 2.15.0 adds possibility to use contact's IP address as a token `{contactfield=ipAddress}` .

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.

Focus items

See in the Focus docs

Update contact's primary company

Action added in Mautic 2.14 and allow edit contact's primary company via campaign. Read also about Mautic's companies support.

Action update contact's primary company based on company custom fields.

If you try update company name, then action will add new or existed company with same name to contact and mark it as primary.

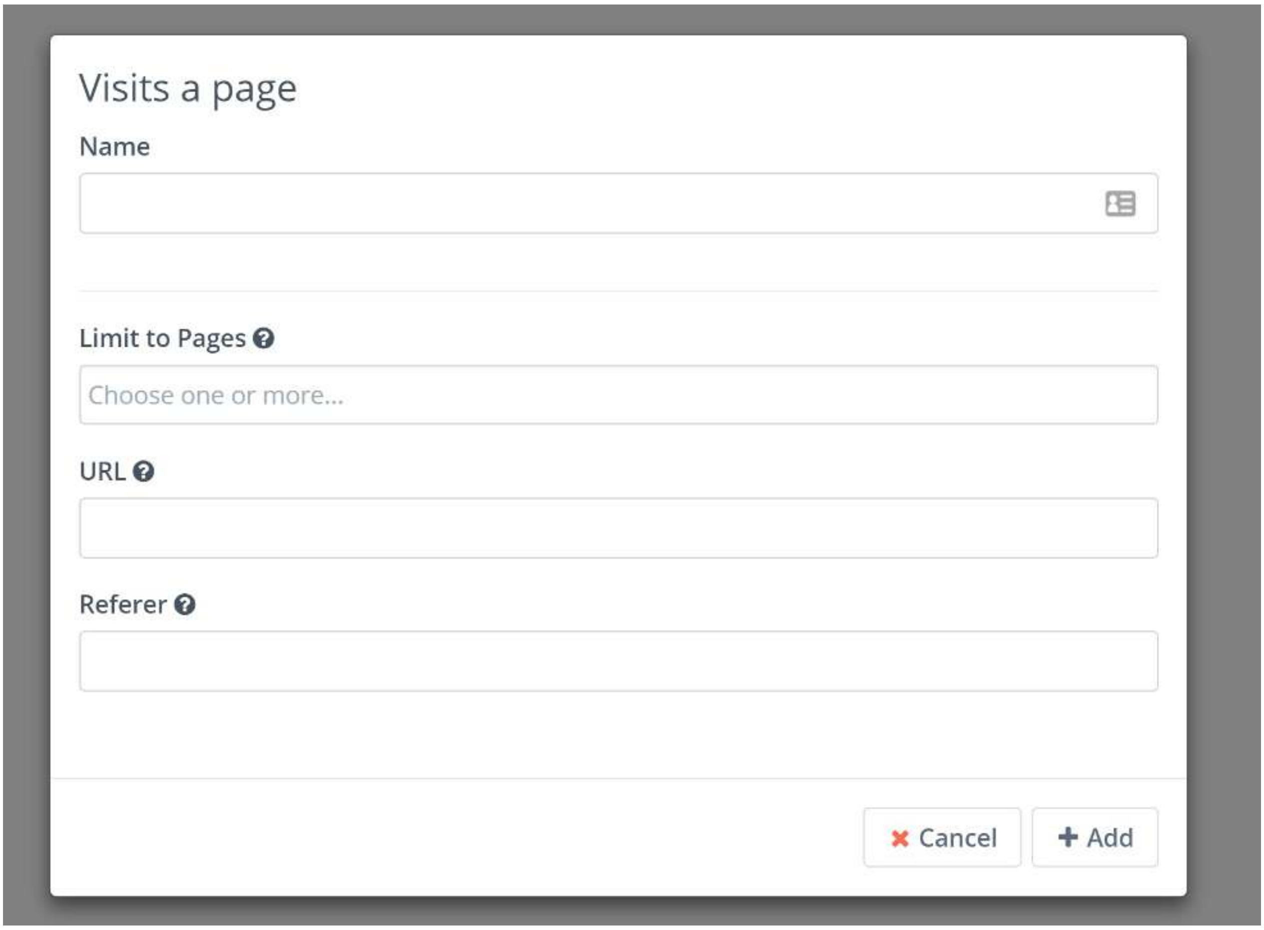
Campaign Decisions

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).


Visits a page
Name
Limit to Pages
Choose one or more...
URL
Referer
Cancel
Add

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.

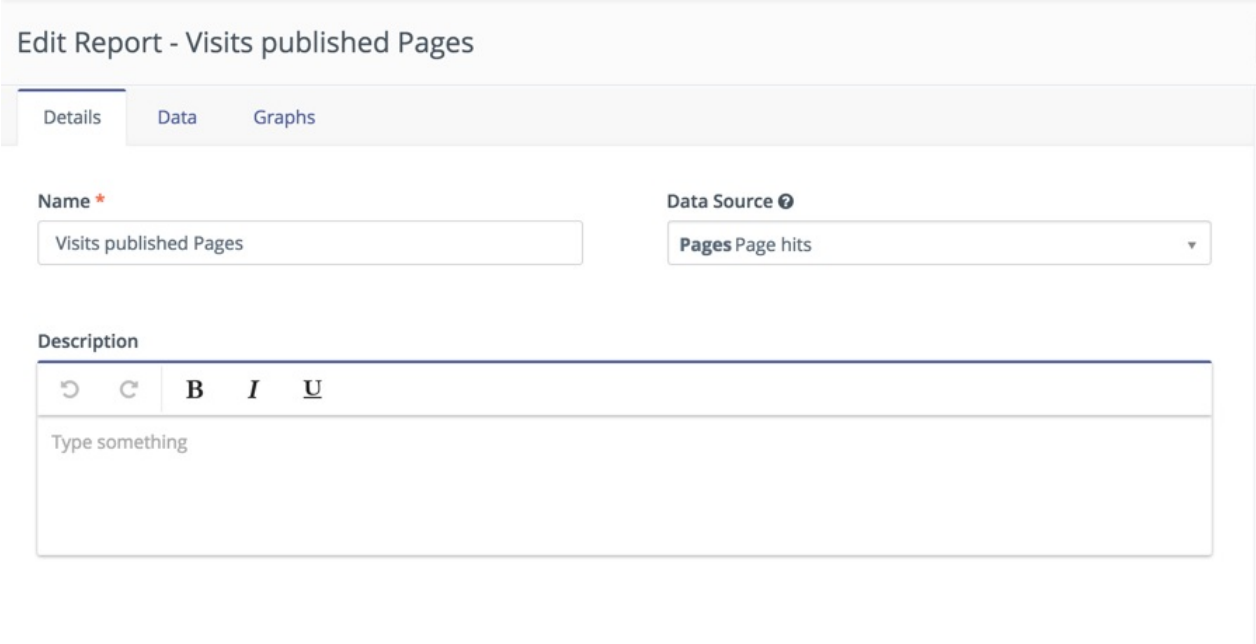
Another example is if you want to associate different page hits with specific campaigns. Let's say you have Campaign A and Campaign B. You want to use the same base URL and path for both campaigns but differentiate with a query parameter. For Campaign A, you can define a Visits a Page decision with `http://example.com/my-page?utm_campaign=A*`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

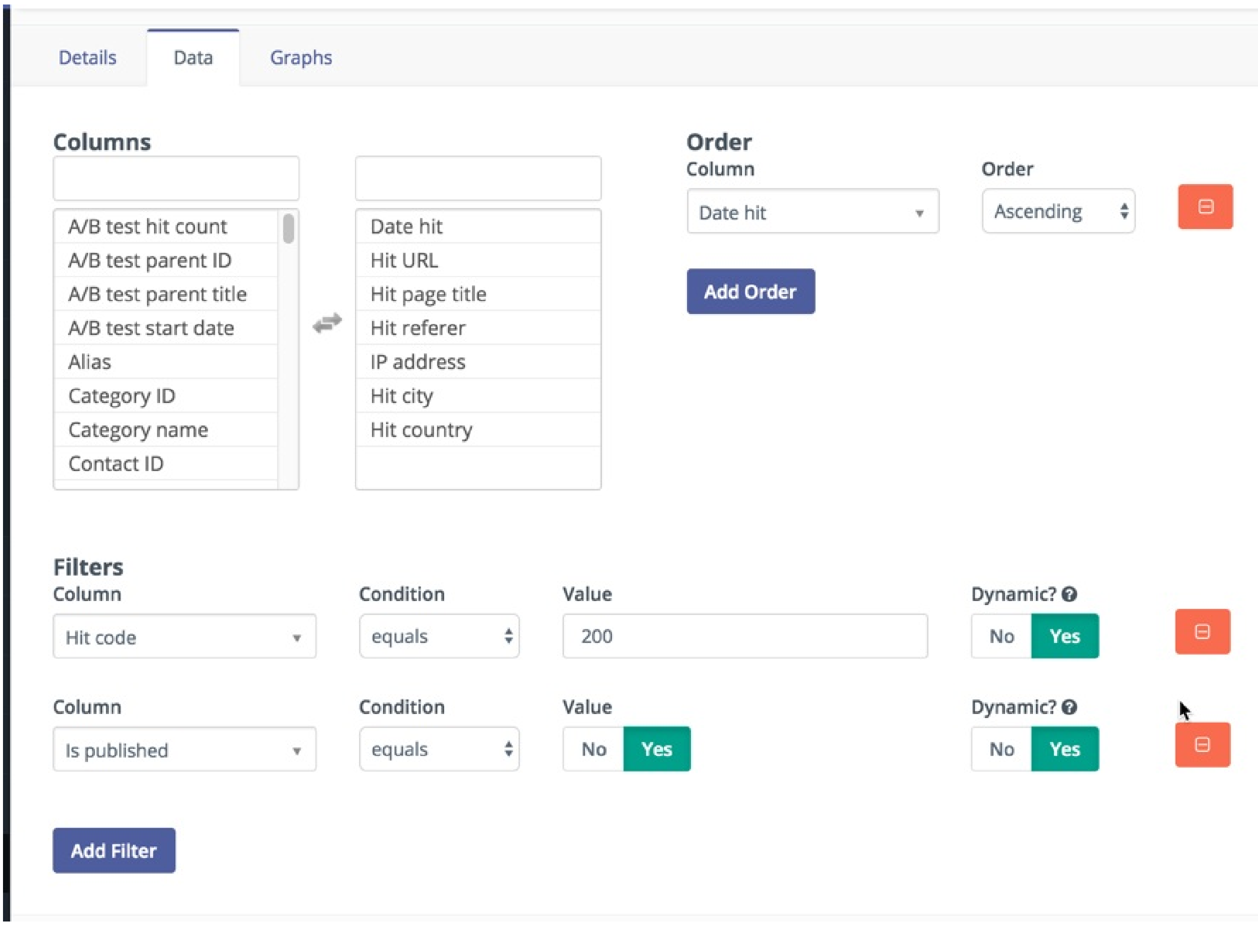
Data Sources

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



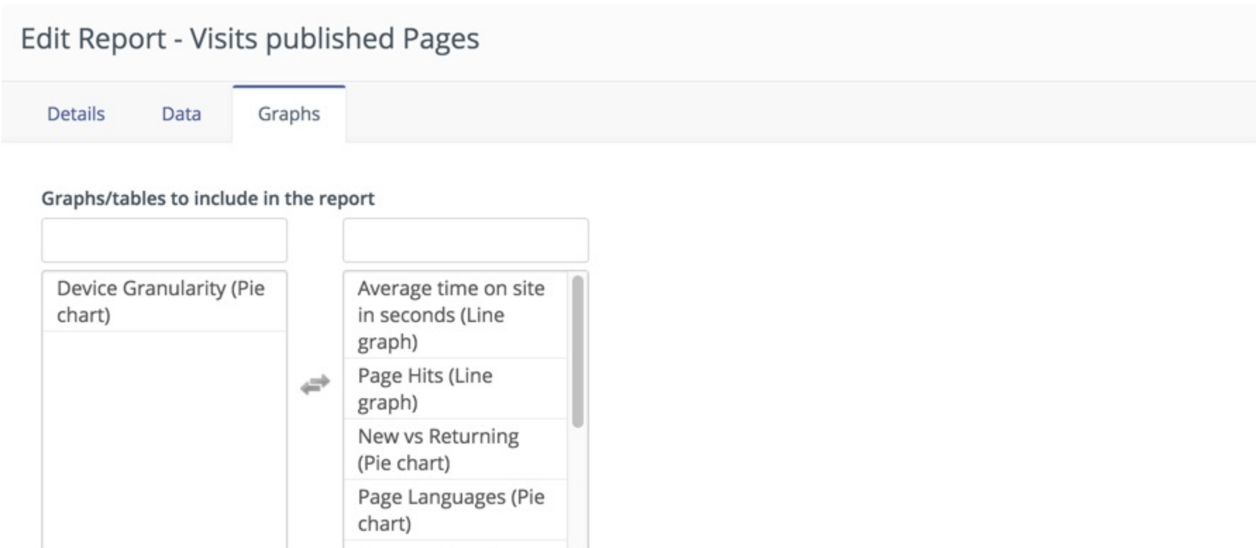
Configuration

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.



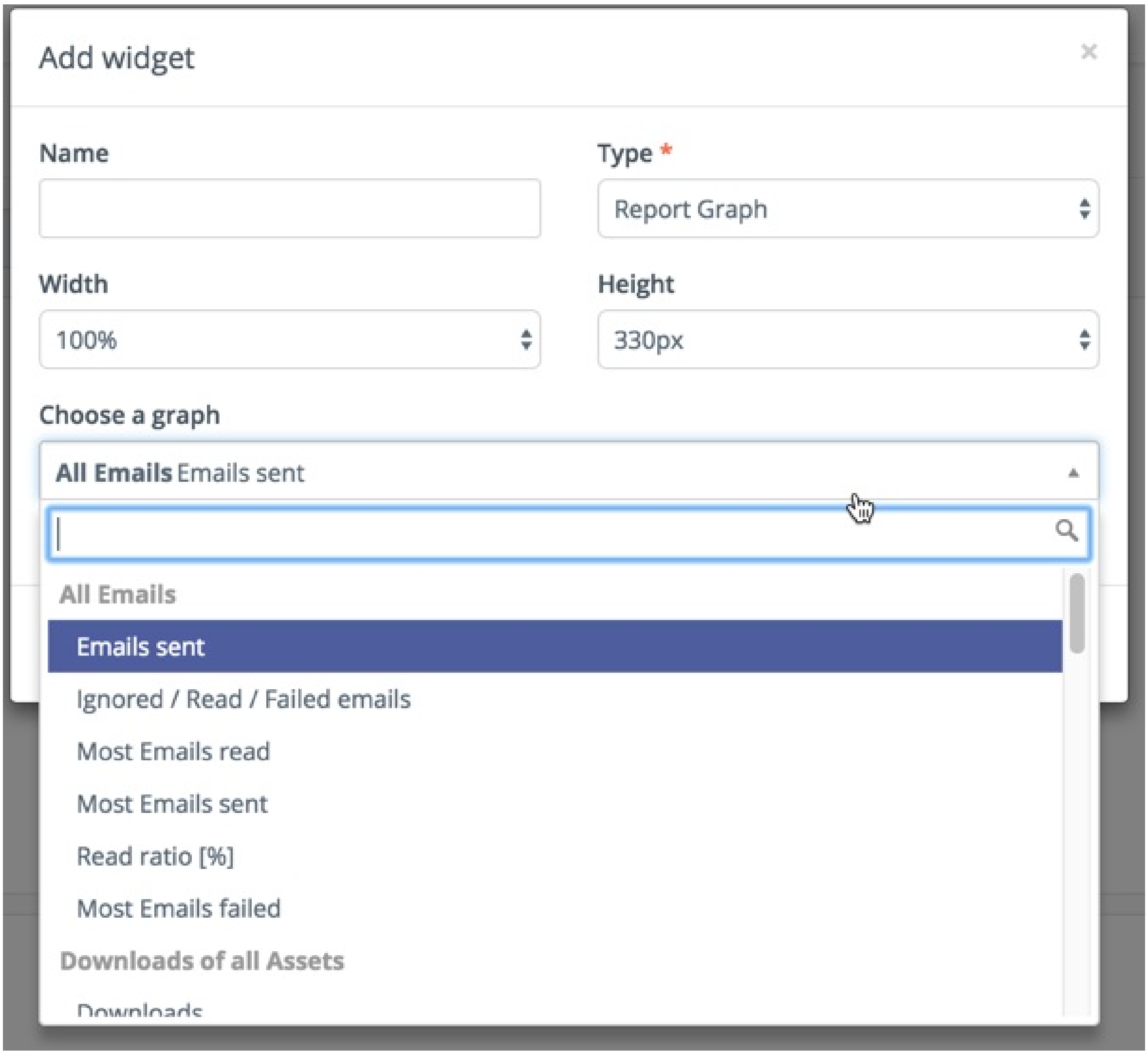
Graphs

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.



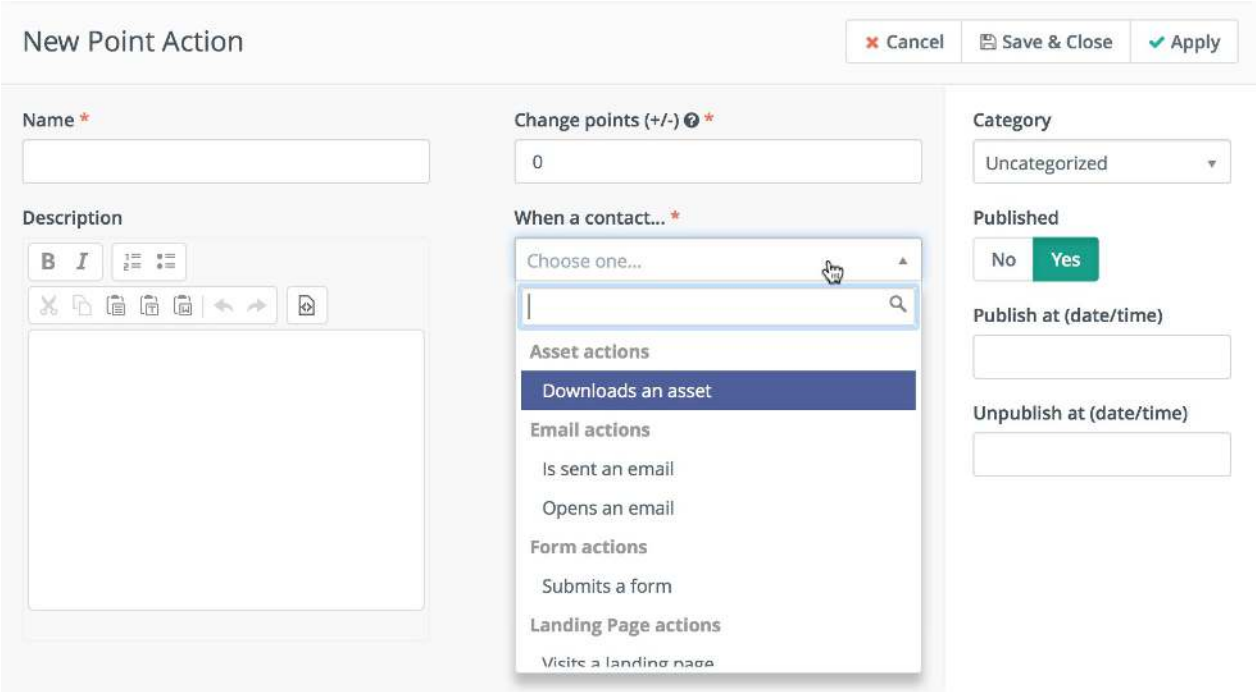
Points

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.

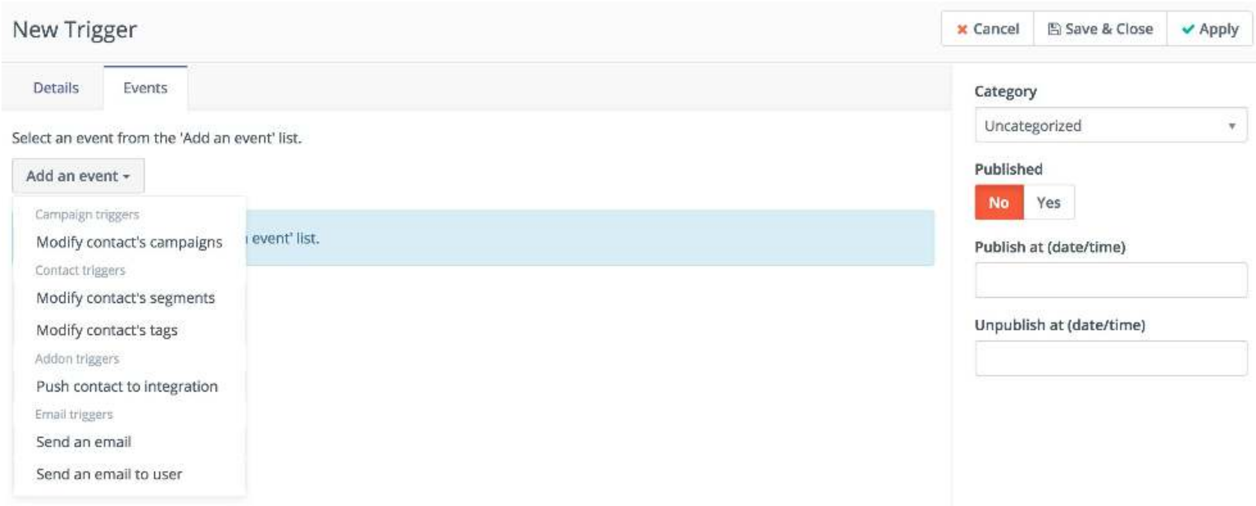


Clearly these actions can be expanded upon as needed. This is the essence of point actions. The other part of the points system are the triggers. They are defined next.

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.

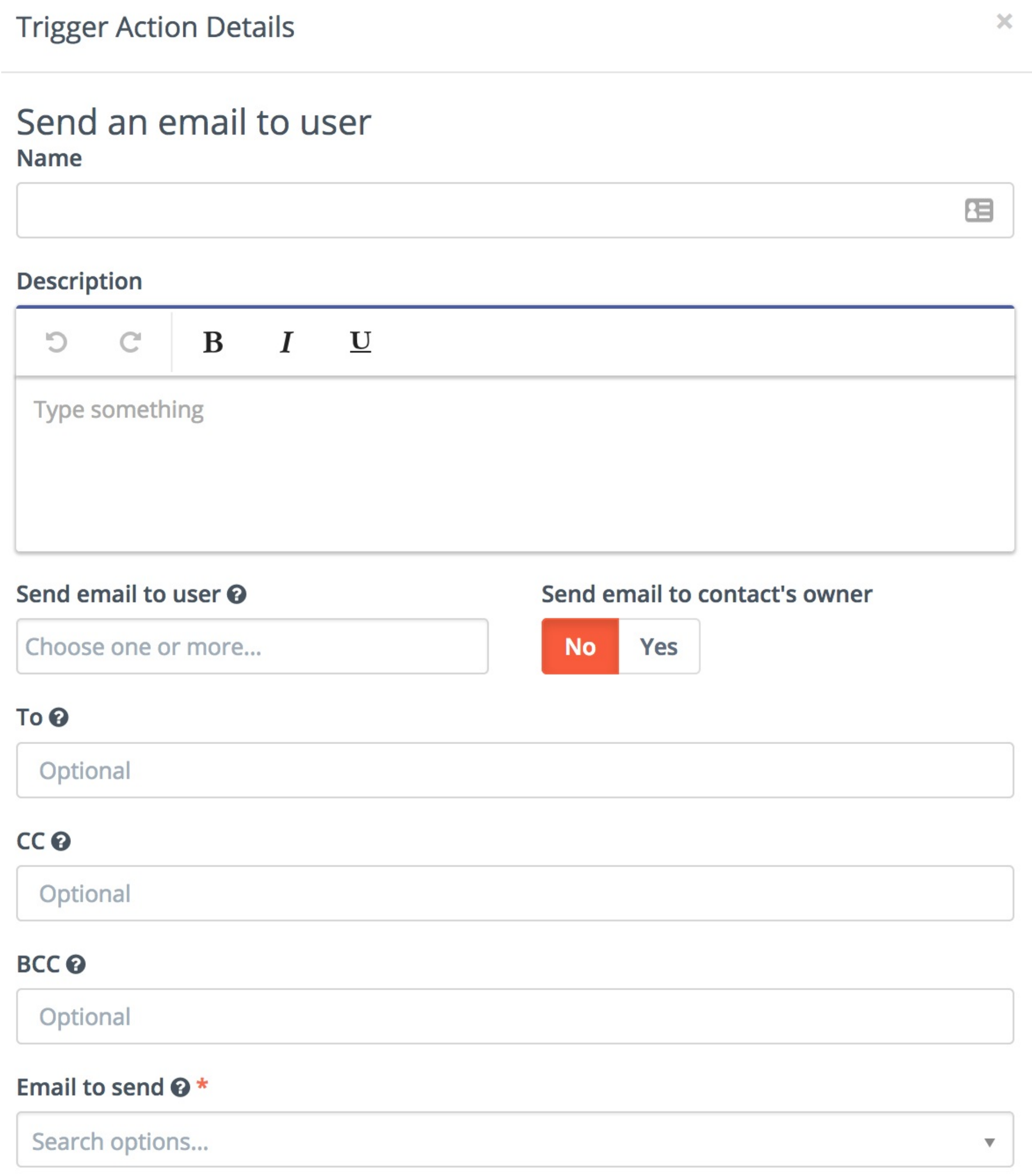
When creating a point trigger you have the option to apply the trigger to all existing and applicable contacts as well as new contacts.



These point triggers and associated events are also fully customizable.

Send an email to user

This event lets you send an email to any user or any email address:



- If you select an user and check "send email to contact's owner" option, both contact will be notified.
- If user has no owner or owner is same as user, only one email will be send.
- You can add more emails to "to", "cc" and "bcc" fields - separate emails with coma (,). You can add space after each coma too.
- Notification will be send to all address - user's email, owner's email, to, cc and bcc.

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 contact's 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.

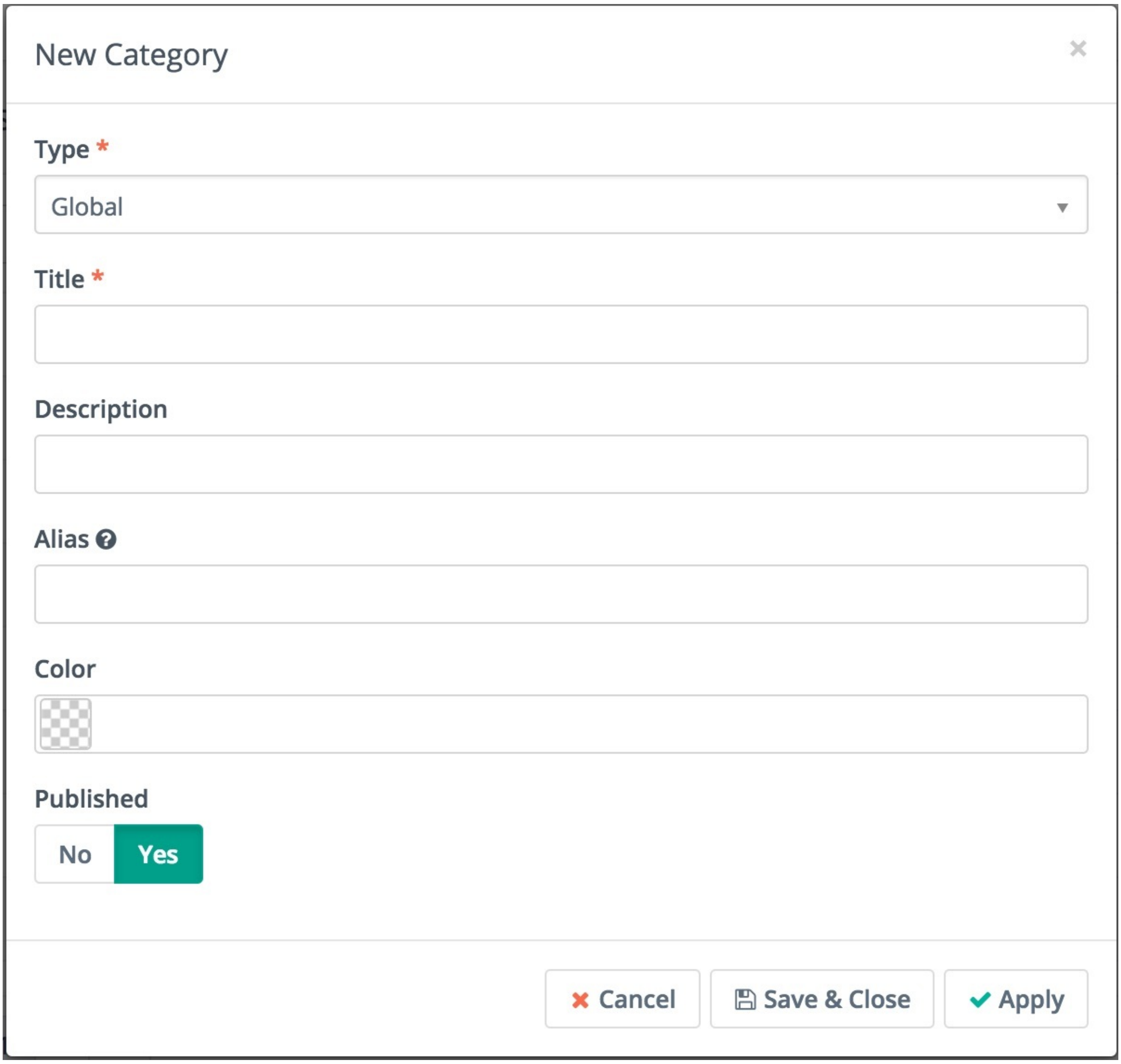
Categories Overview

Categories are a way to organize Mautic elements. They are available for assets, campaigns, emails, focus items, forms, pages, points, social monitoring and stages. There are two ways to use categories:

1. Create element-specific categories (e.g. only for assets, emails or forms)
2. Create global categories for all Mautic elements

Creating/Managing Categories

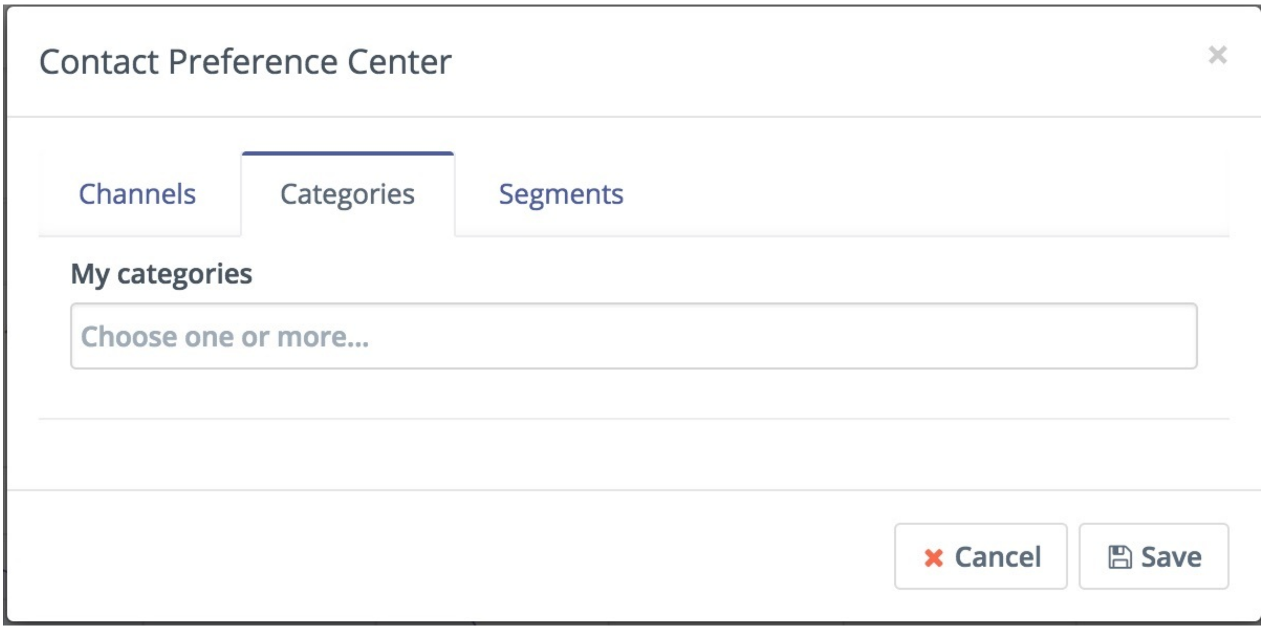
To create a new categories, go to settings menu in the top right corner of Mautic. There choose categories.



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

Using Categories for Contacts

In addition to organizing various Mautic elements categories can be used to organize contacts. In contact details use the Preference menu to open Contact Preference Center.

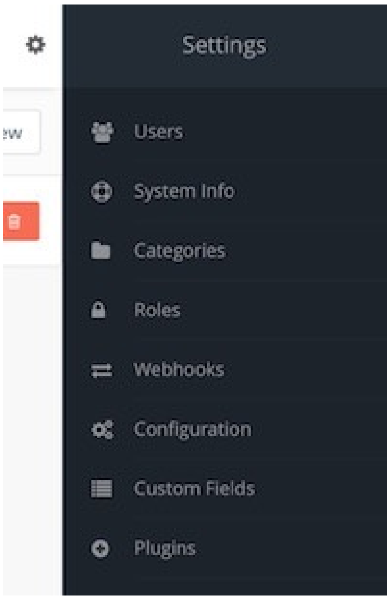


Contact categories can be used in segment and dynamic content filters.

Plugins

Mautic plugins are installable packages which can extend Mautic functionality or integrate 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*** button 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 plugins", clear your Mautic cache and try the ***Install/Upgrade plugins*** button again.

Citrix Plugins

Description

The plugins pull data from Mautic and push data to Mautic from these products:

- *GotoMeeting*
- *GotoWebinar*
- *GotoTraining*
- *GoToAssist*

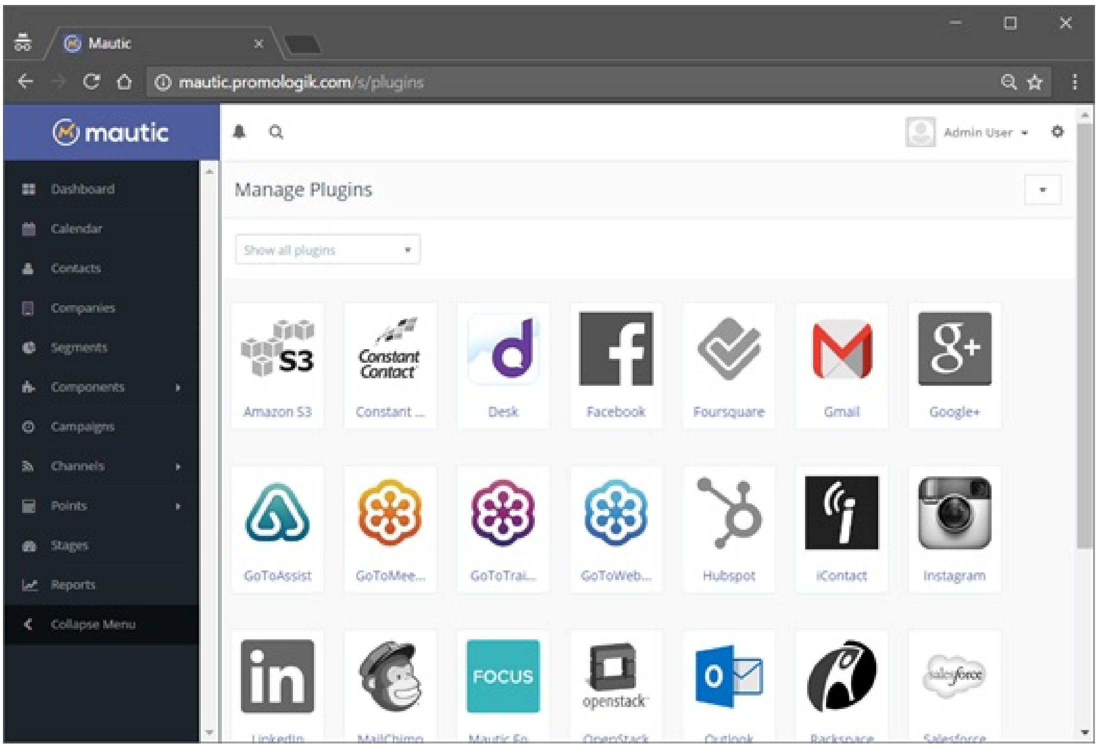
Features

1. Create registrants in *GoToWebinar* and *GoToTraining* based on Campaign decisions, Contact data and also from registration Forms in Mautic
2. Use registrant and attendee information in Segments (filters), Forms and Campaigns (actions and decisions).
3. Display *GoToWebinar* and *GoToTraining* attendance as an additional activity on the Contact timeline
4. Send emails with buttons to start *GoToMeeting*, *GoToTraining* and *GoToAssist* sessions

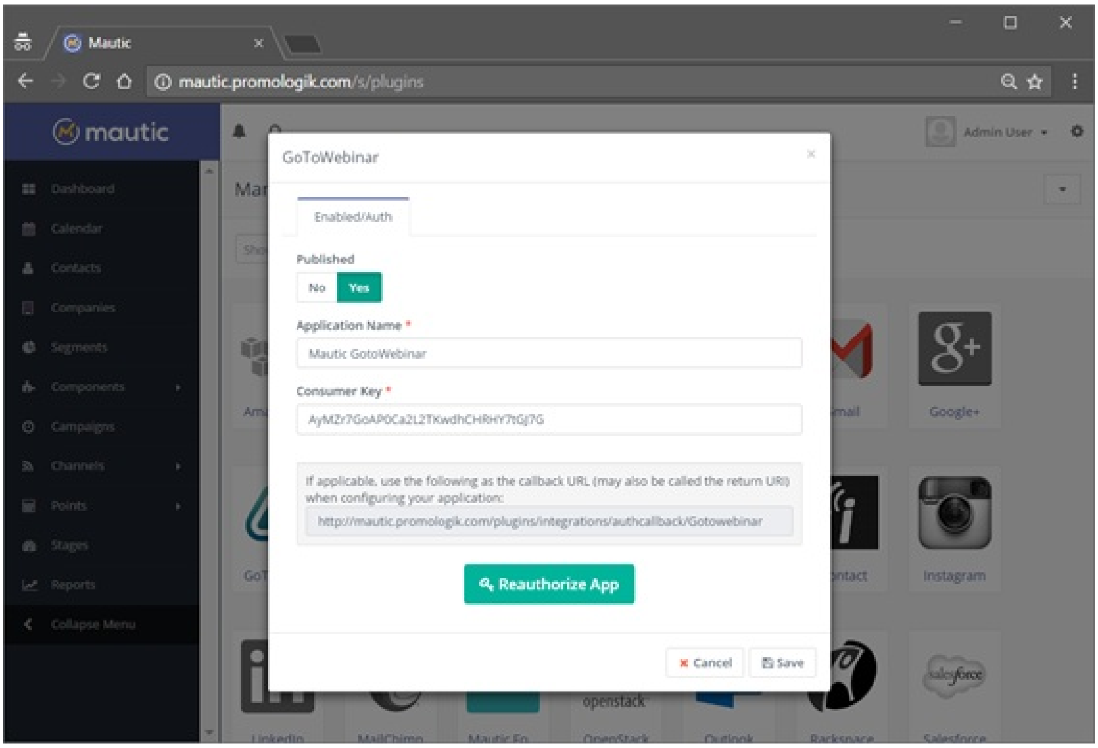
Plugin activation instructions

> **Note**
>
> These examples use *GoToMeeting* and *GoToWebinar*, but it's the same for *GoToTraining* and *GoToAssist*

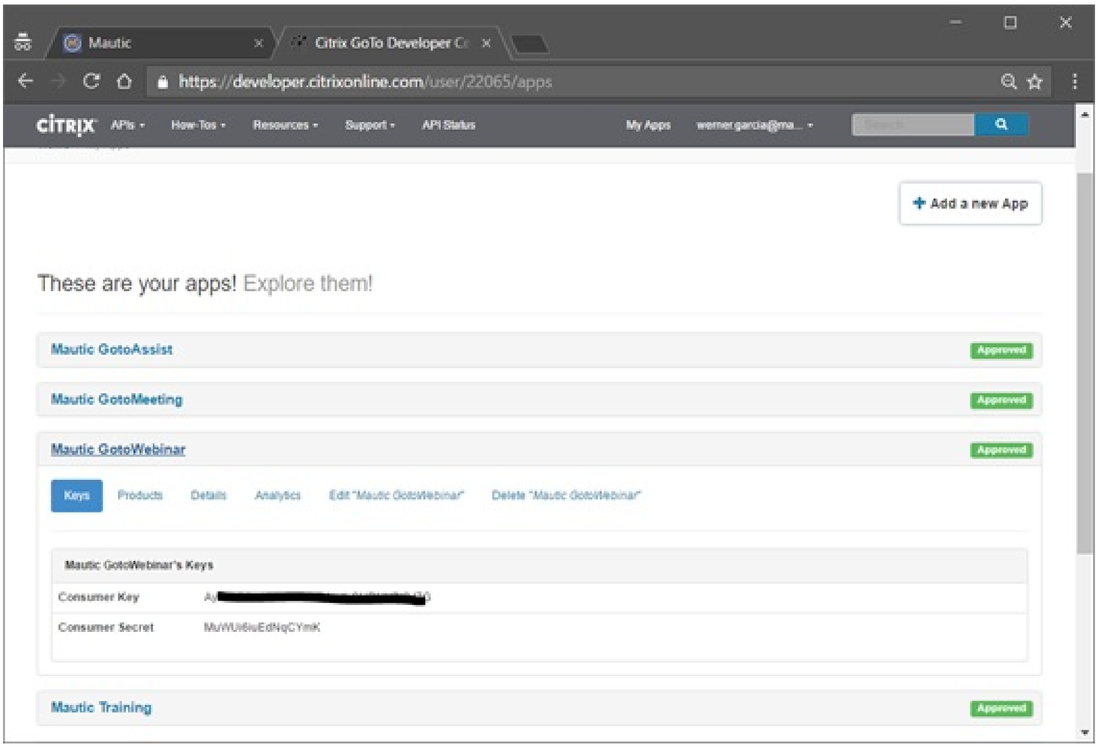
1. Enable the plugins you need



1. Activate the plugins with the Citrix Developer API keys



- Use the Consumer Keys from the Citrix developer website

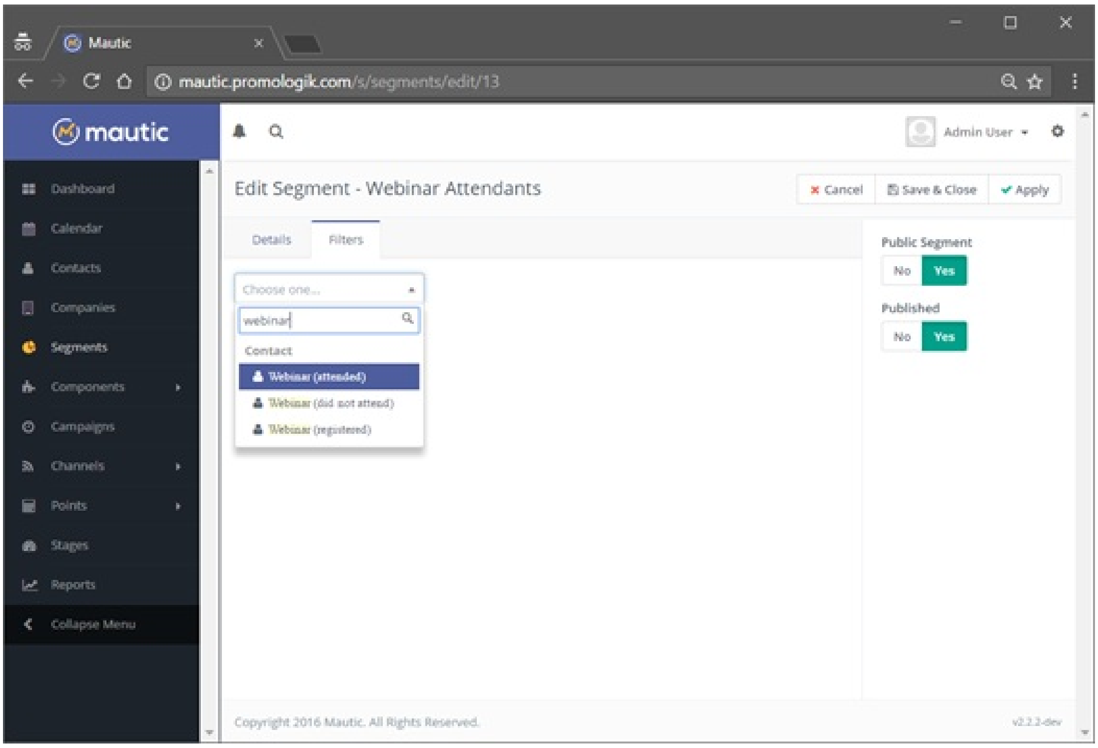


New integrations

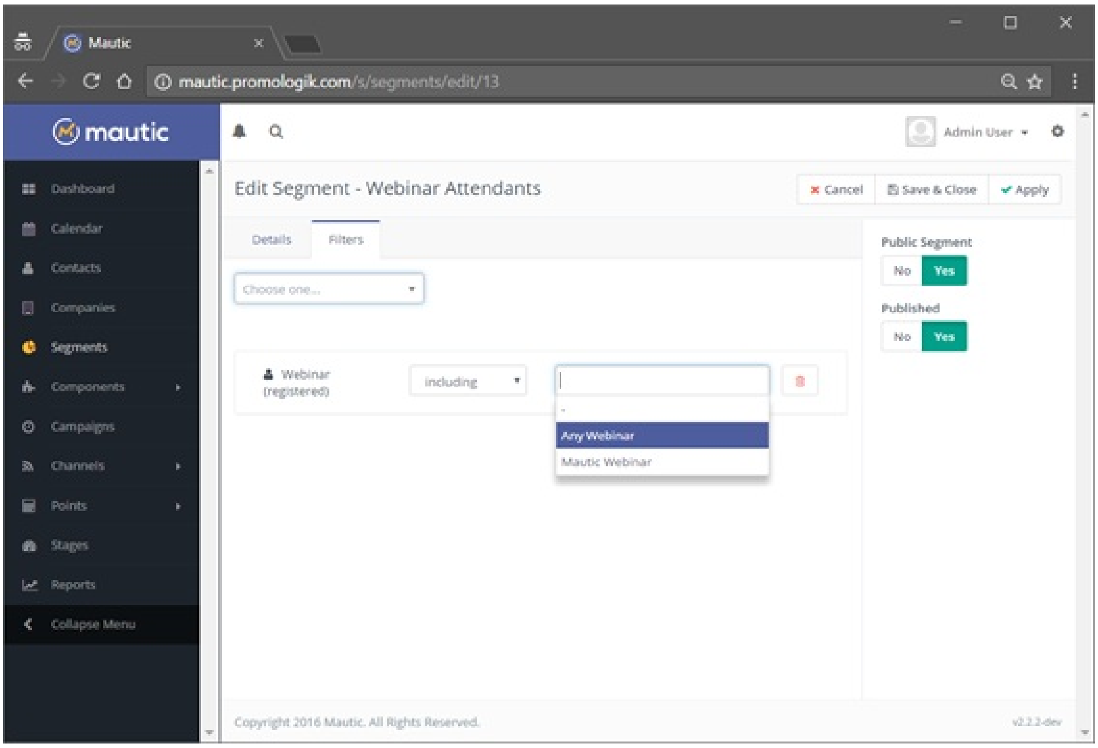
Segments

New filters

New Segment filters will be available



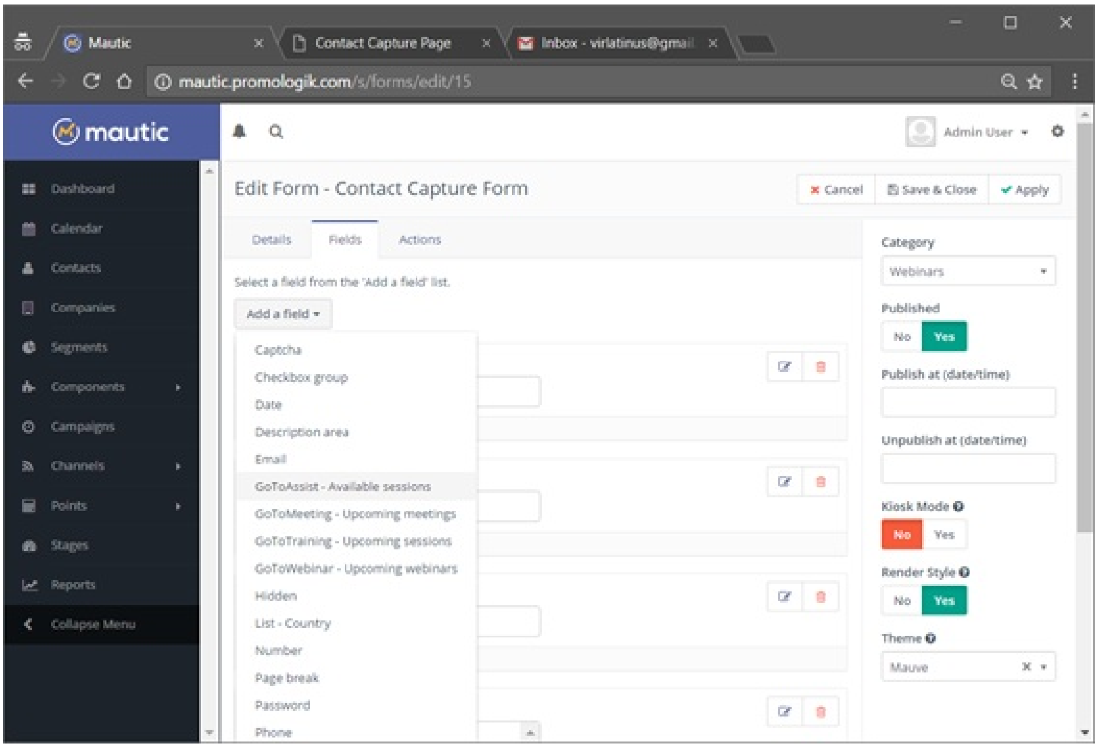
- Past *GoToProduct* sessions will be available to choose from



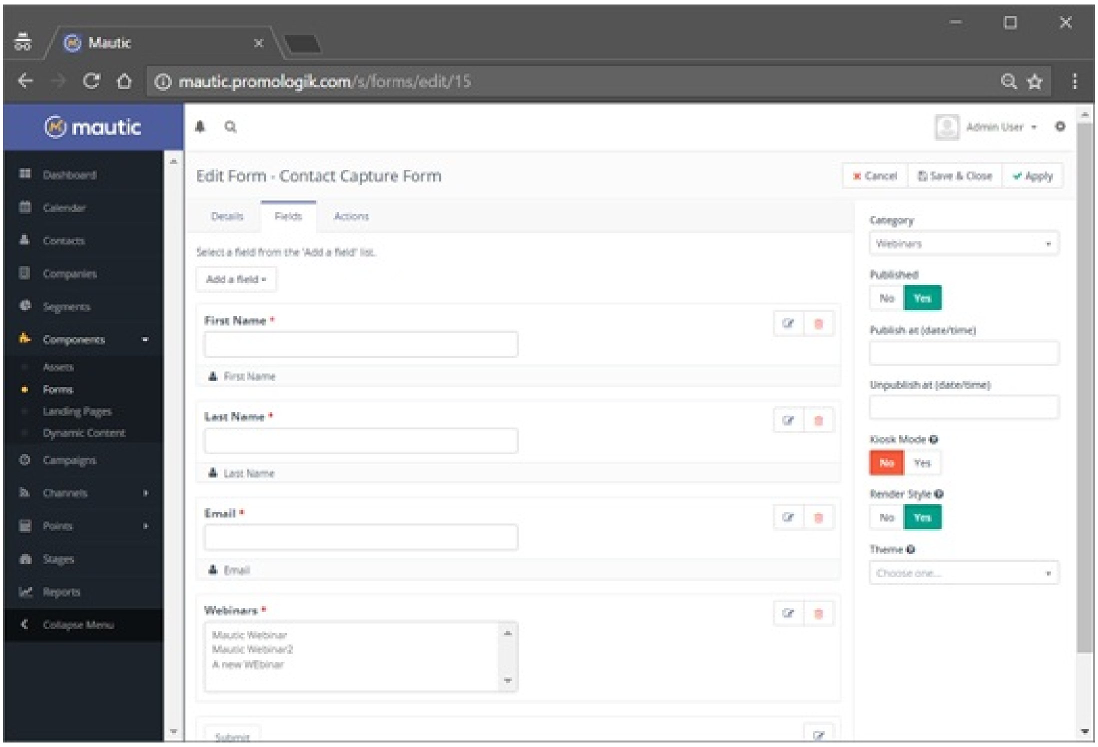
Forms

New fields

New Form fields will be available

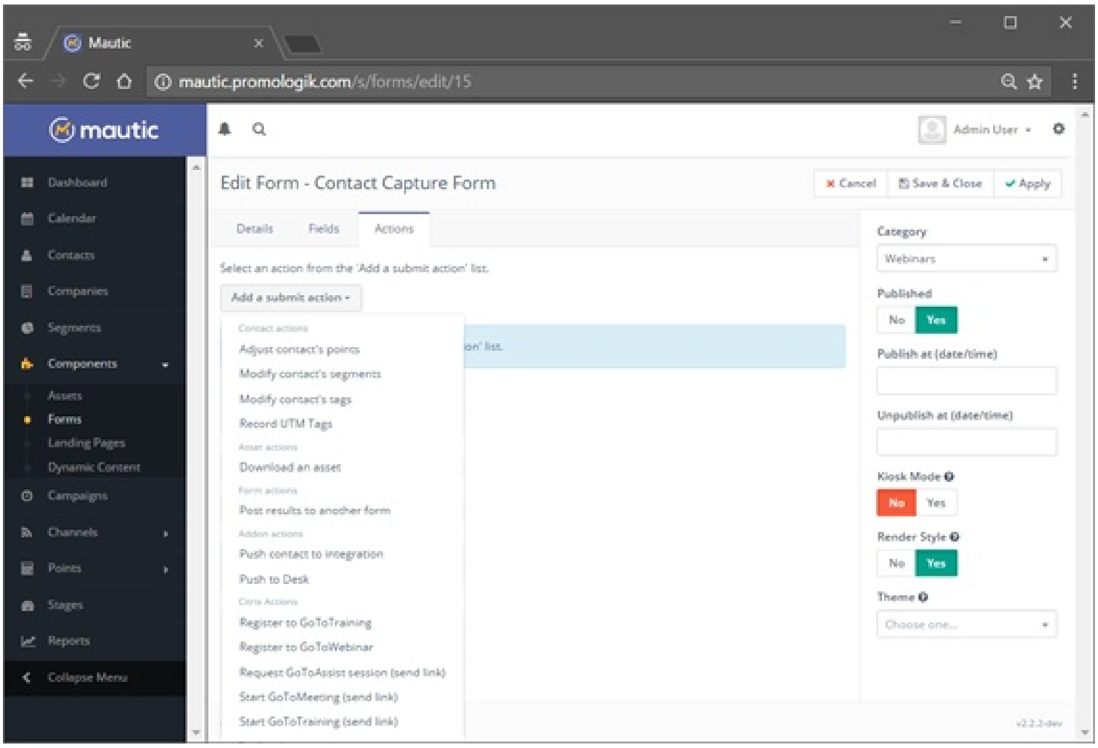


- The fields will display the available events for each product
- The Form will validate that the mandatory fields are present

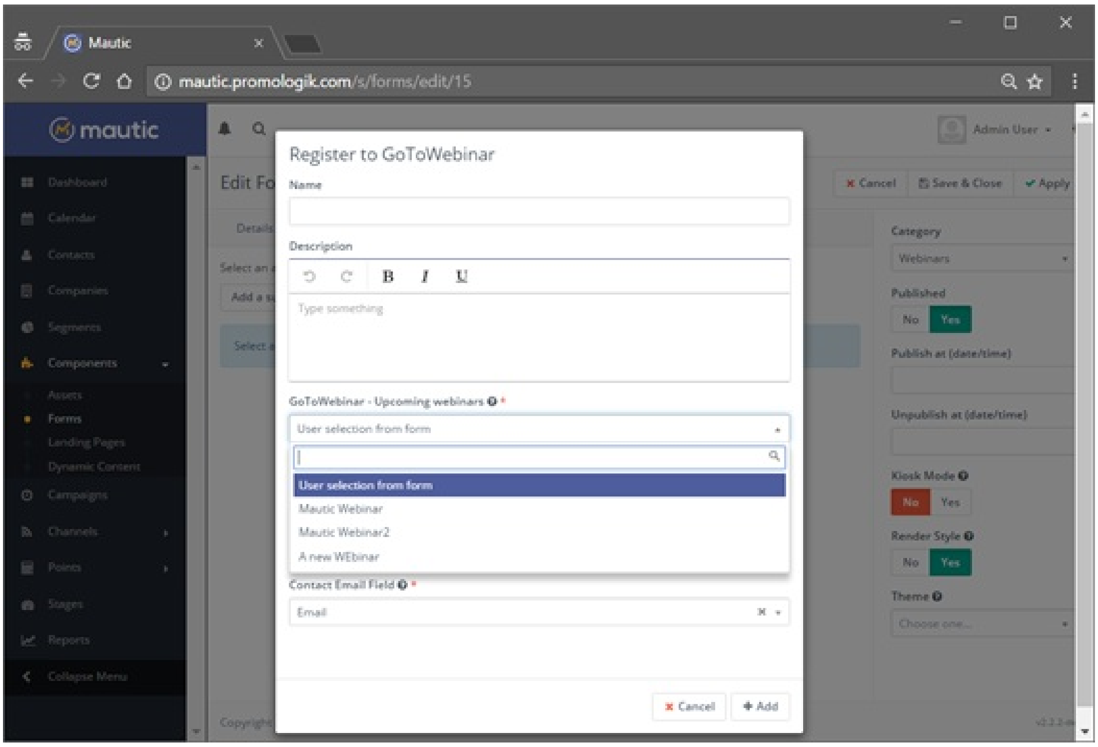


New actions

New Form actions will also be available



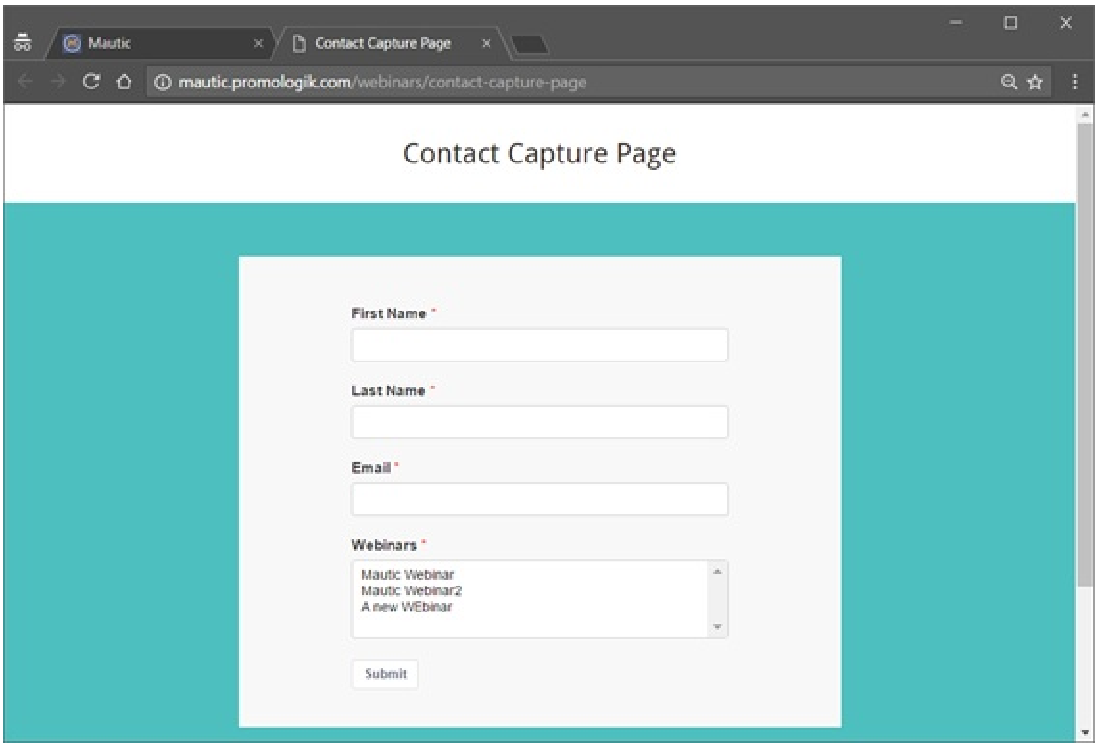
- Each action will permit to select a single event or let the user select from the form.
- They also include fields to map to obligatory lead fields



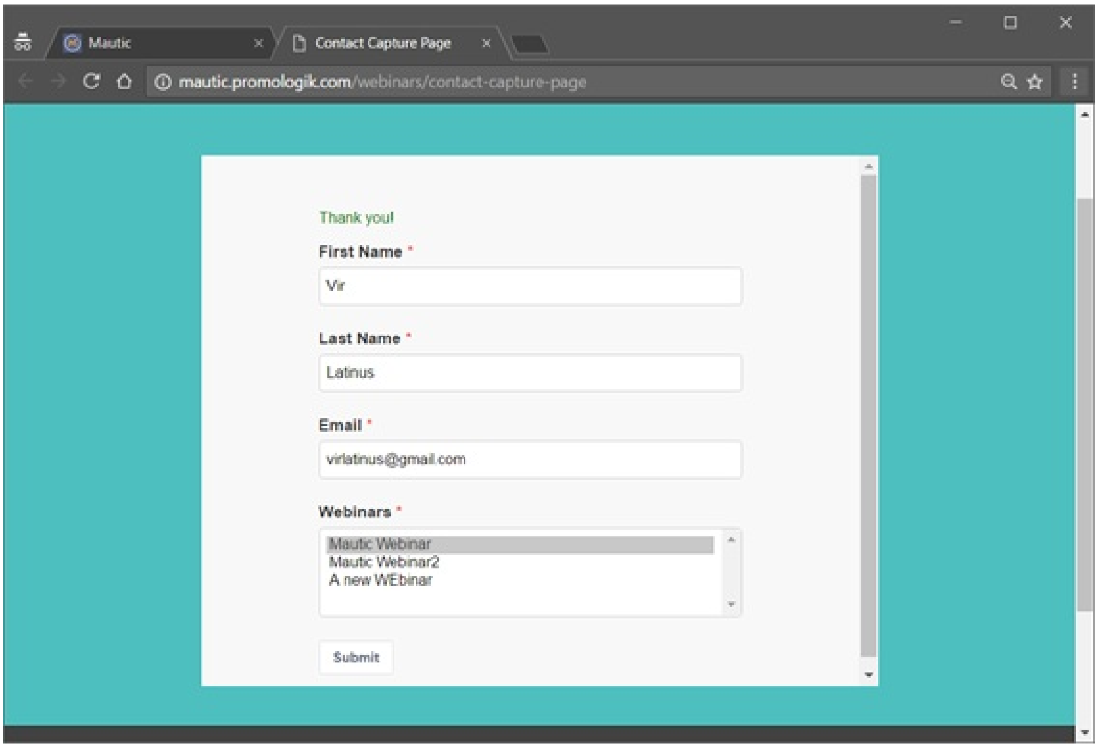
Form examples

User selects an event from a list

- Select event

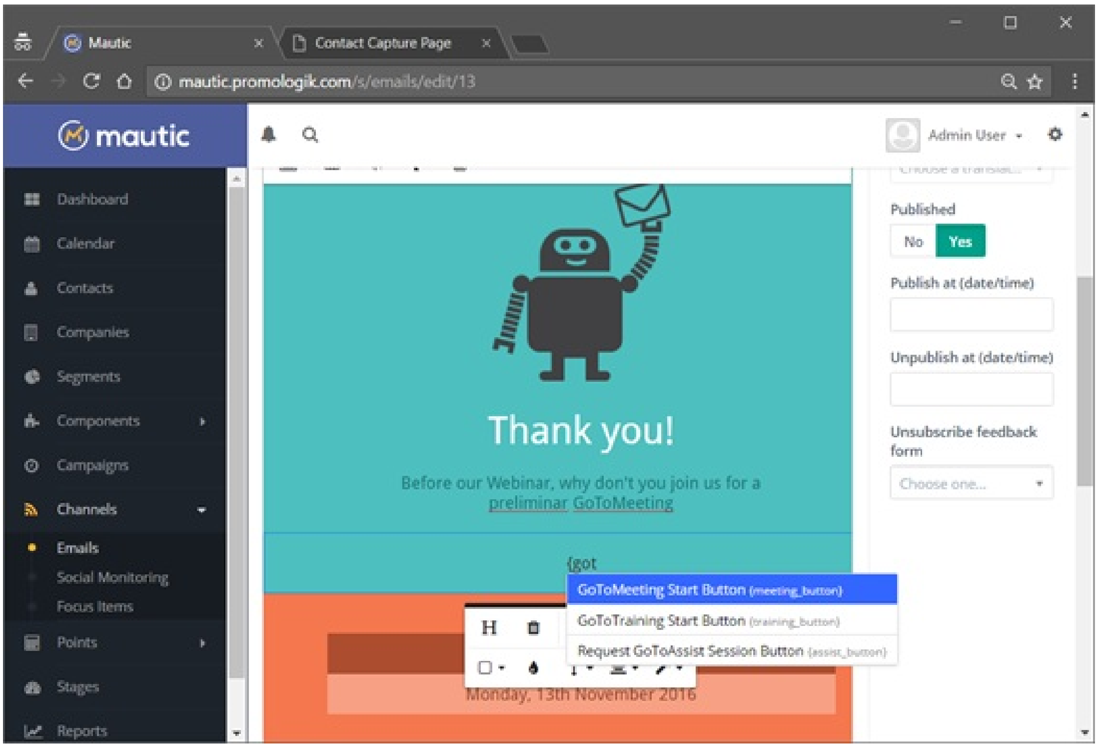


- Form submitted



Send Start button link

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

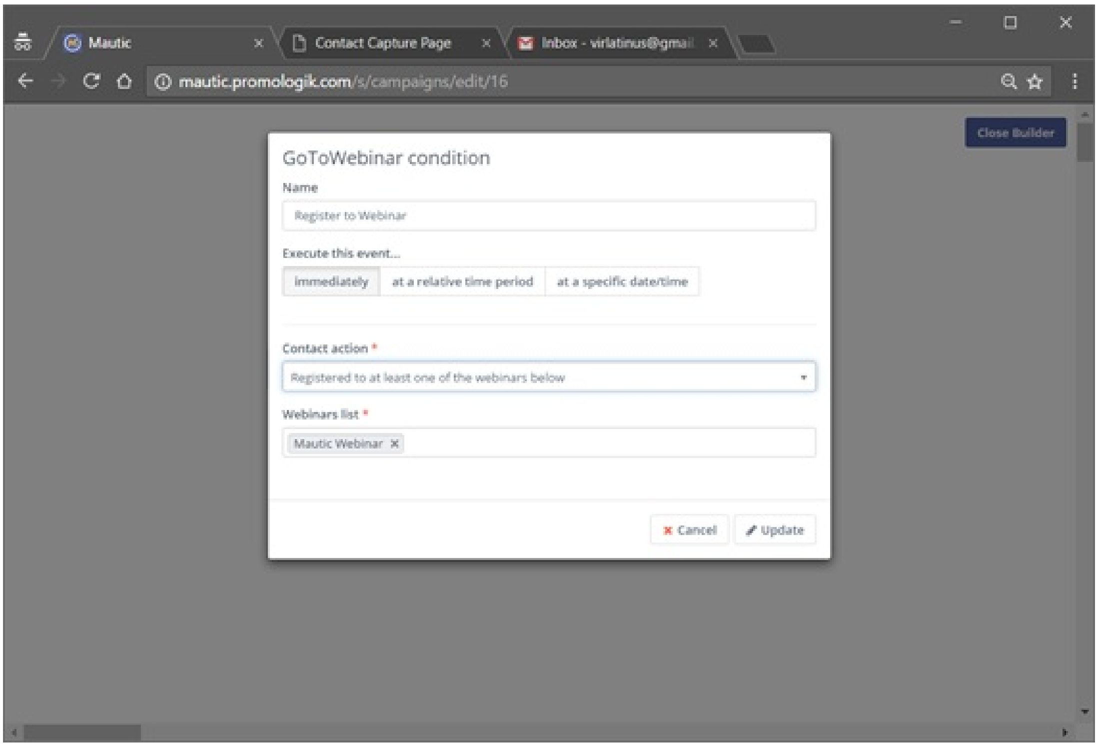


Campaigns

New Campaign conditions

New Campaign actions will be available

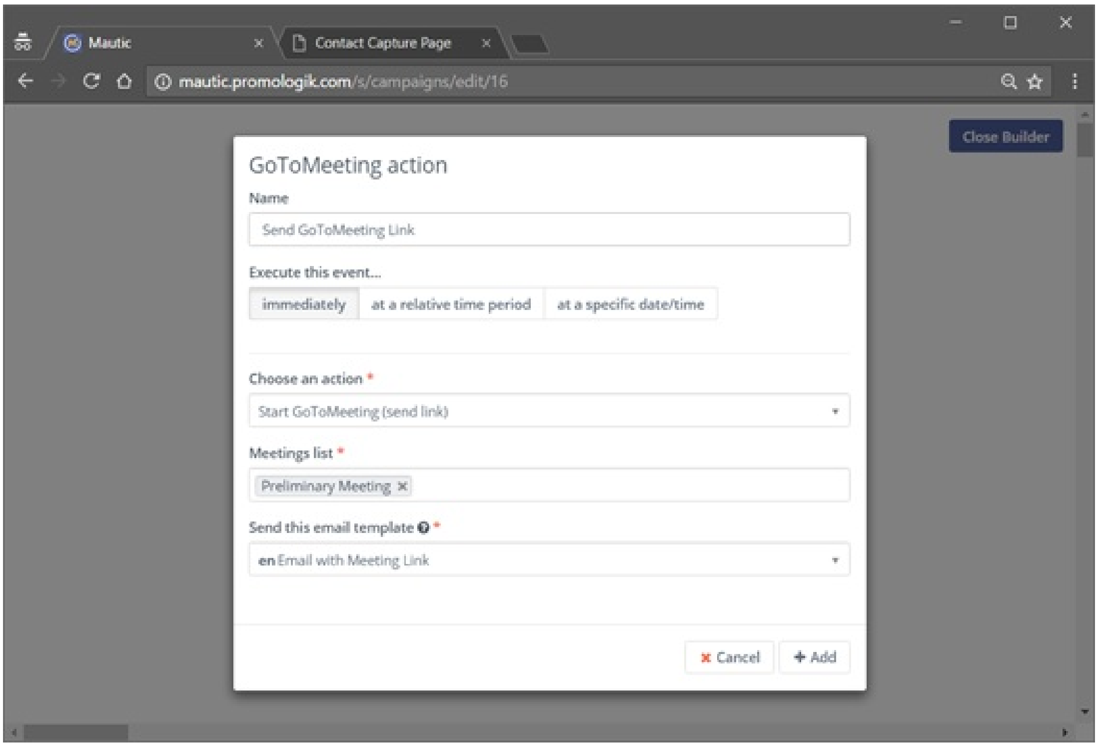
- New conditions for registered and attended contacts



New Campaign actions

New Campaign actions will be available

- Select the event and the email template to send (if applicable)

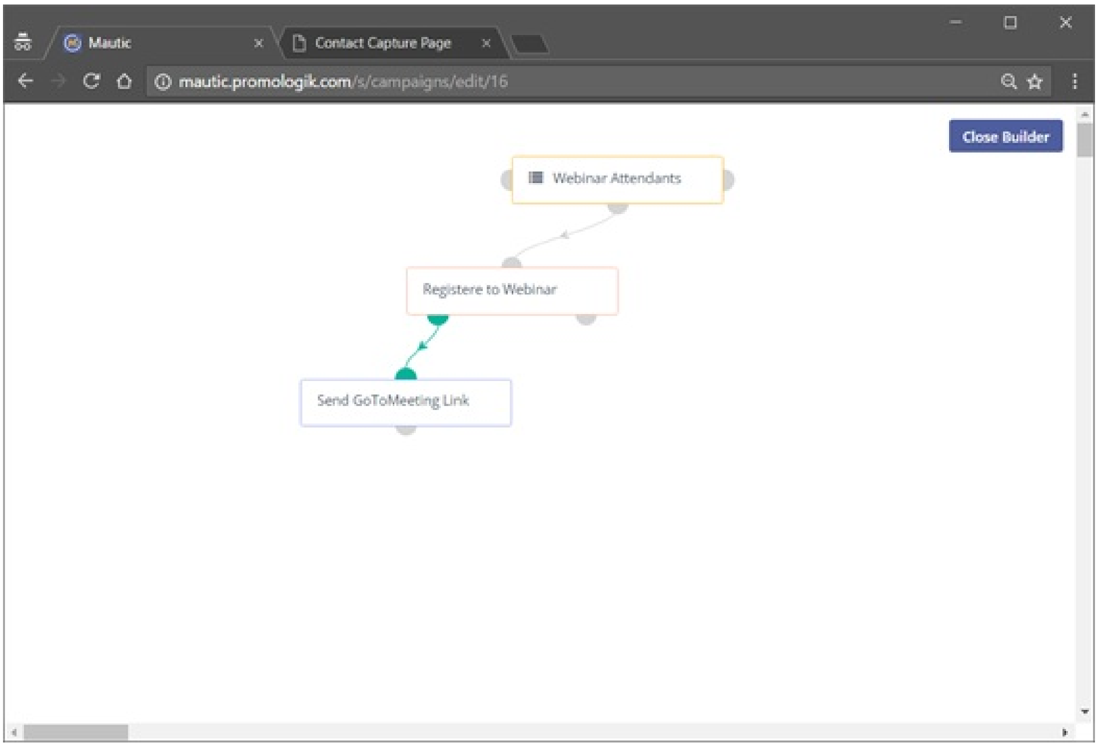


Campaign examples

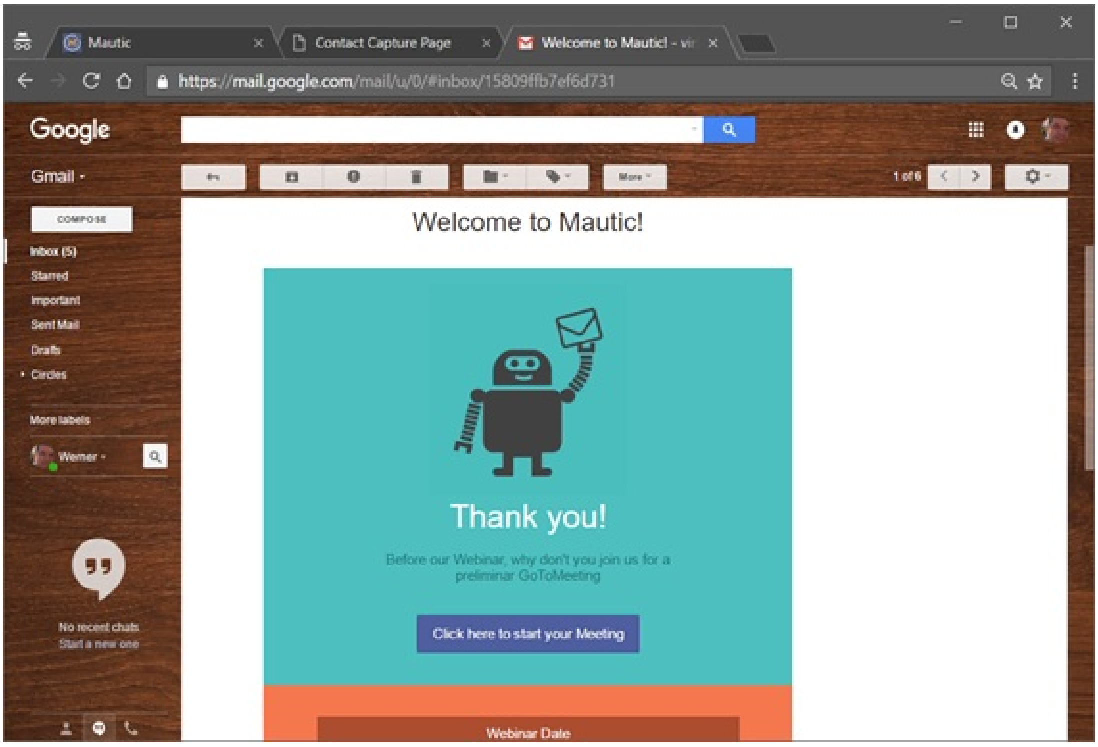
Send a webinar start link to registered Contact

This is an example of a Campaign that:

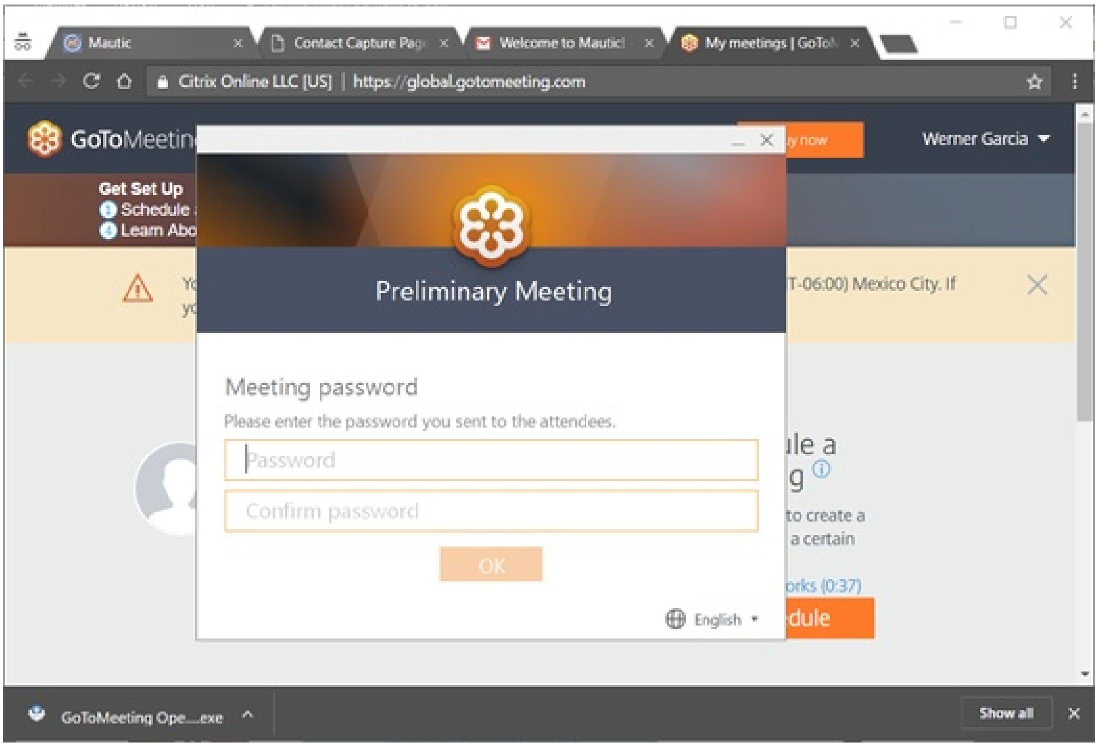
- includes Contacts from a source Segment
- identifies Contact as having registered for a webinar
- sends a start link to event *Preliminary Meeting*



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



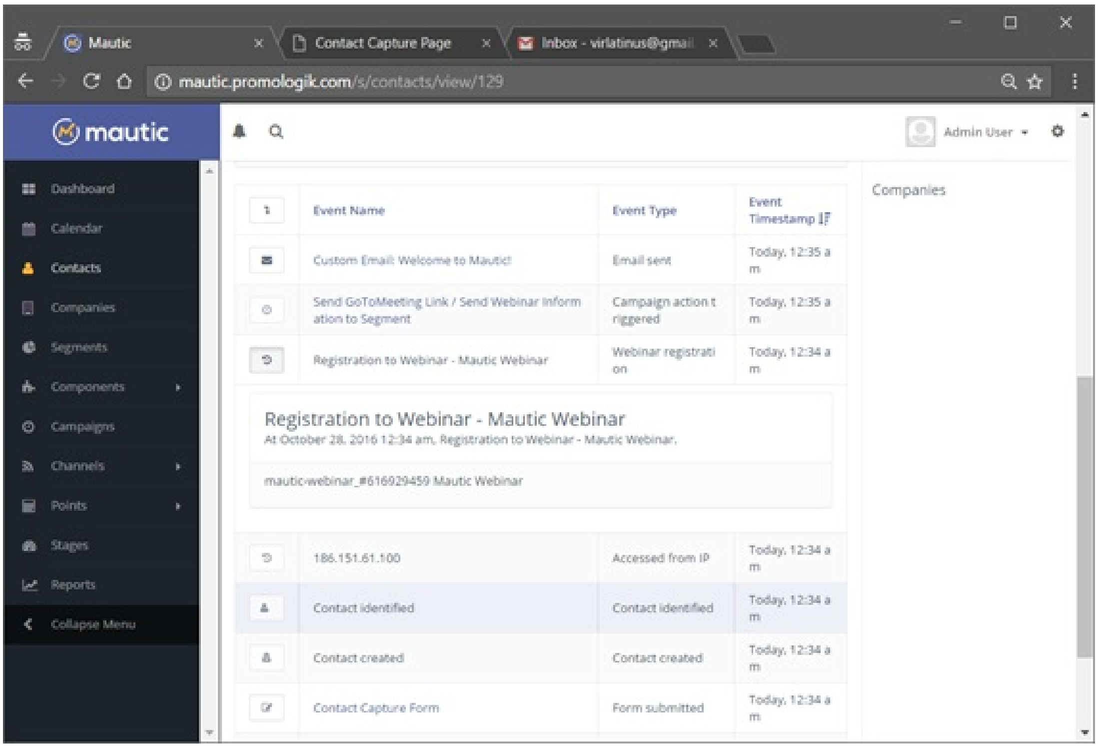
- When the contact clicks on the link, it redirects to *GoToMeeting* to start the meeting



Contacts

Contact timeline

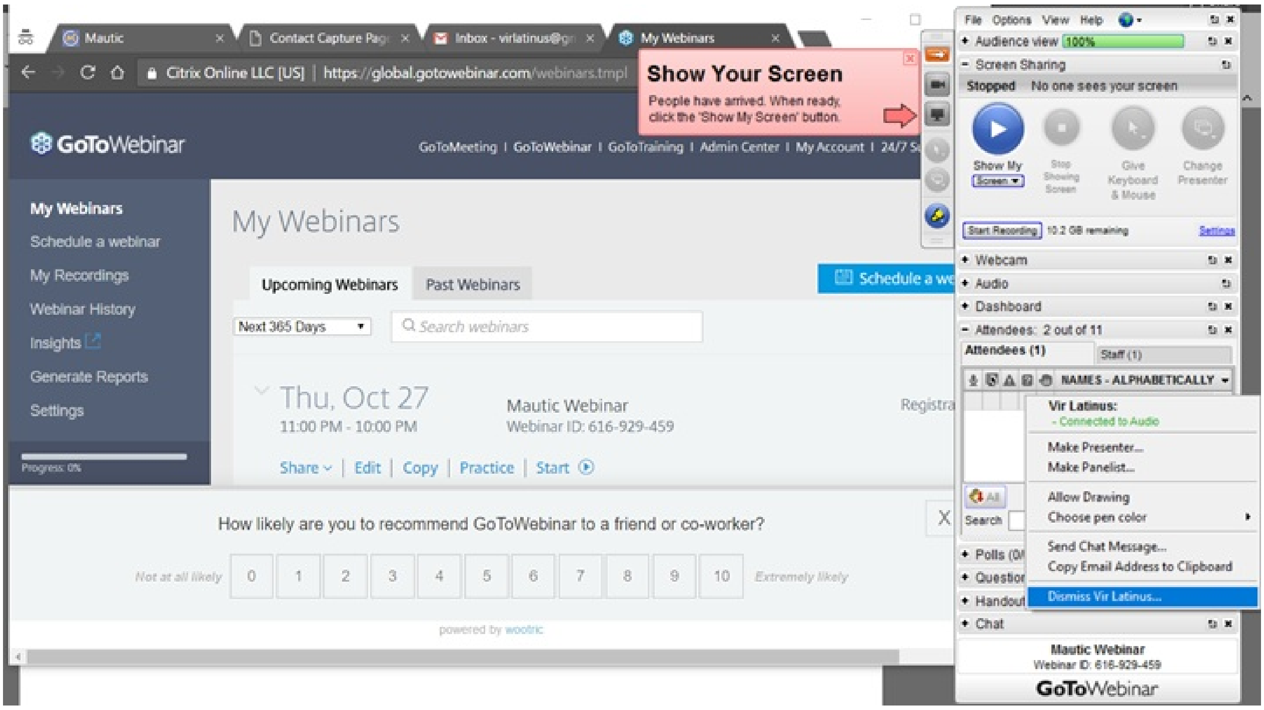
New events appear in the Contact's timeline



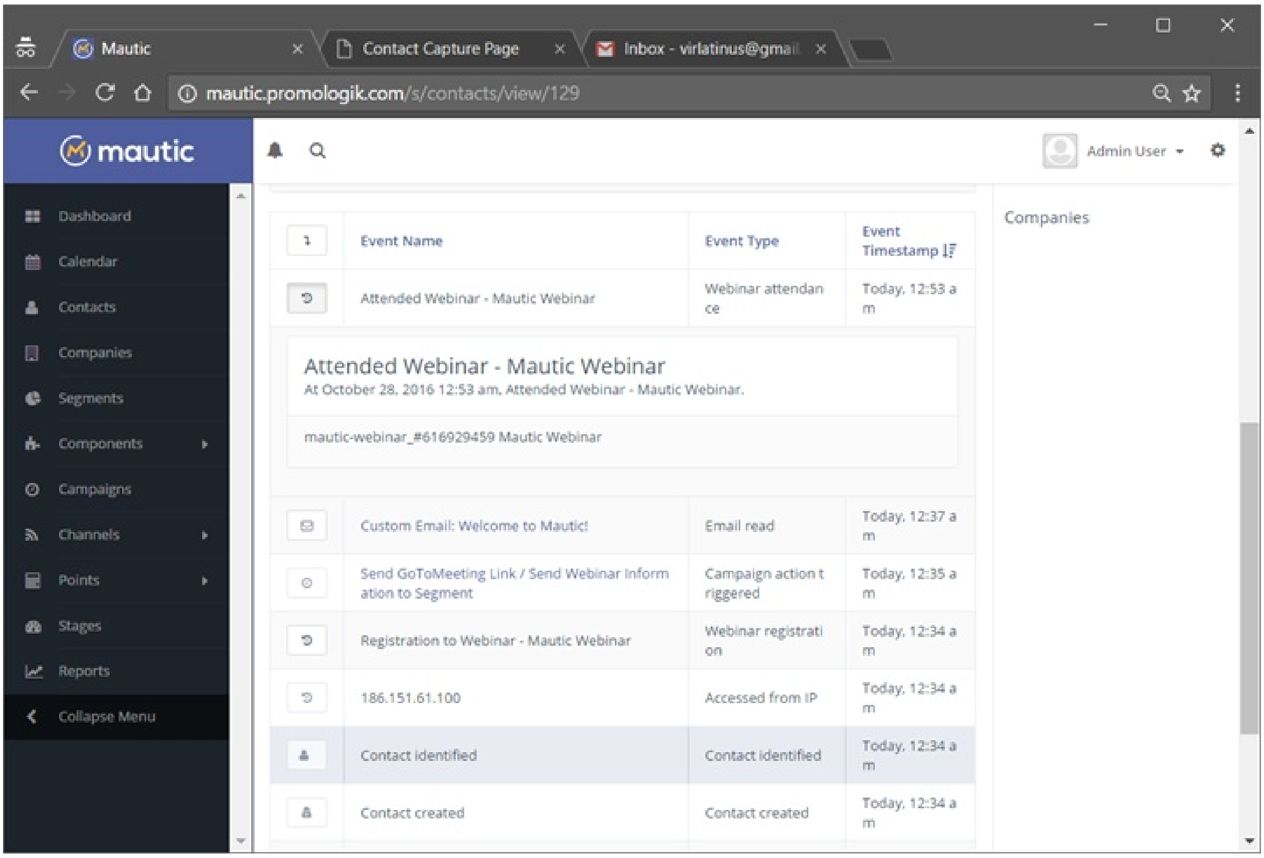
Contact examples

Attended webinar

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



When the cron job that synchronizes the data runs, it retrieves the new state of the contact and the data is visible on the timeline as an attended event



Synchronize events data cron job

The cron job to synchronize the events is

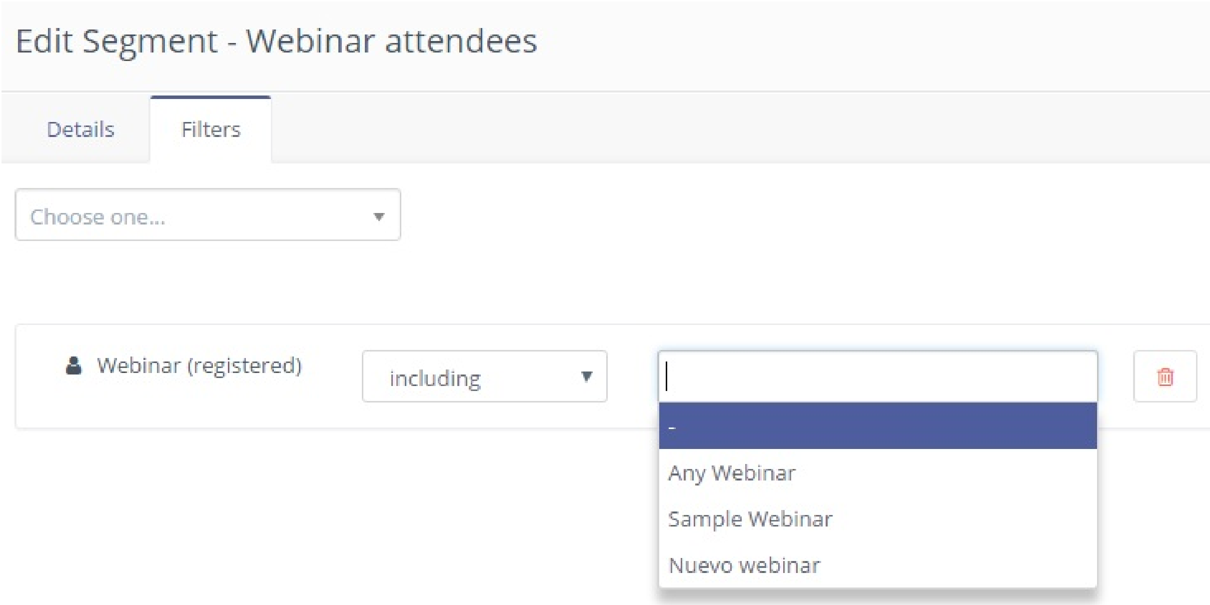
```
php app/console mautic:citrix:sync

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

Follow these steps to include a *GoToWebinar Join Button* in a Segment email:

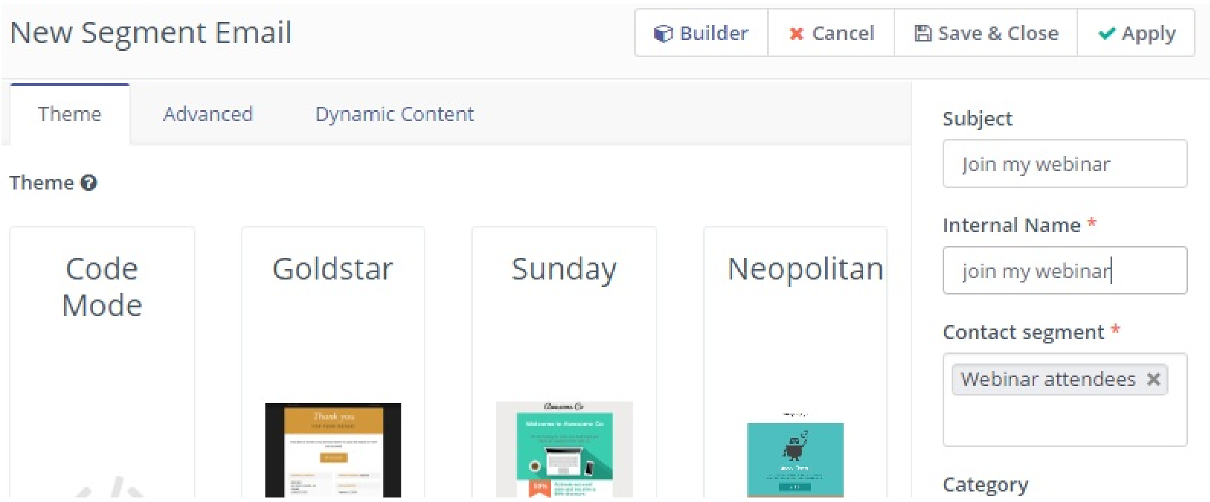
1. Create a webinar in the GotoWebinar website
2. Create a new contact and use the email address to register for the new webinar
3. Run the Citrix Sync console command: `php app/console mautic:citrix:sync` so that the webinar information is retrieved to the database.
4. Create a Segment with a "Webinar (registered)" filter.

> **Note**
>
> This is mandatory, and it will be validated when trying to save the email with the token in the body

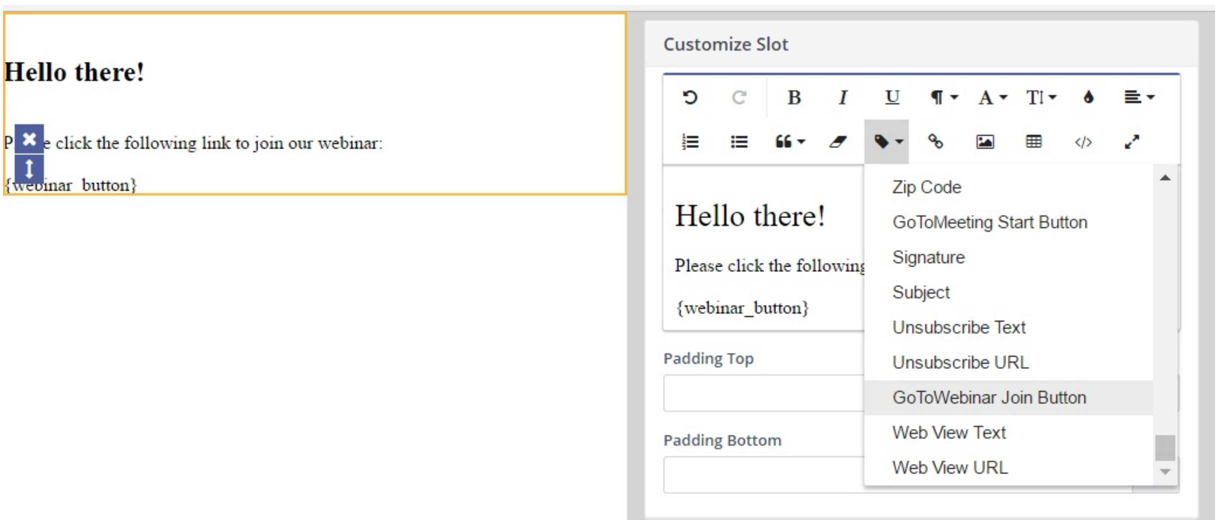


5. Add the Contact to the Segment manually or by running `php app/console mautic:segments:update`

6. Create a new Segment Email and assign the previously created segment.



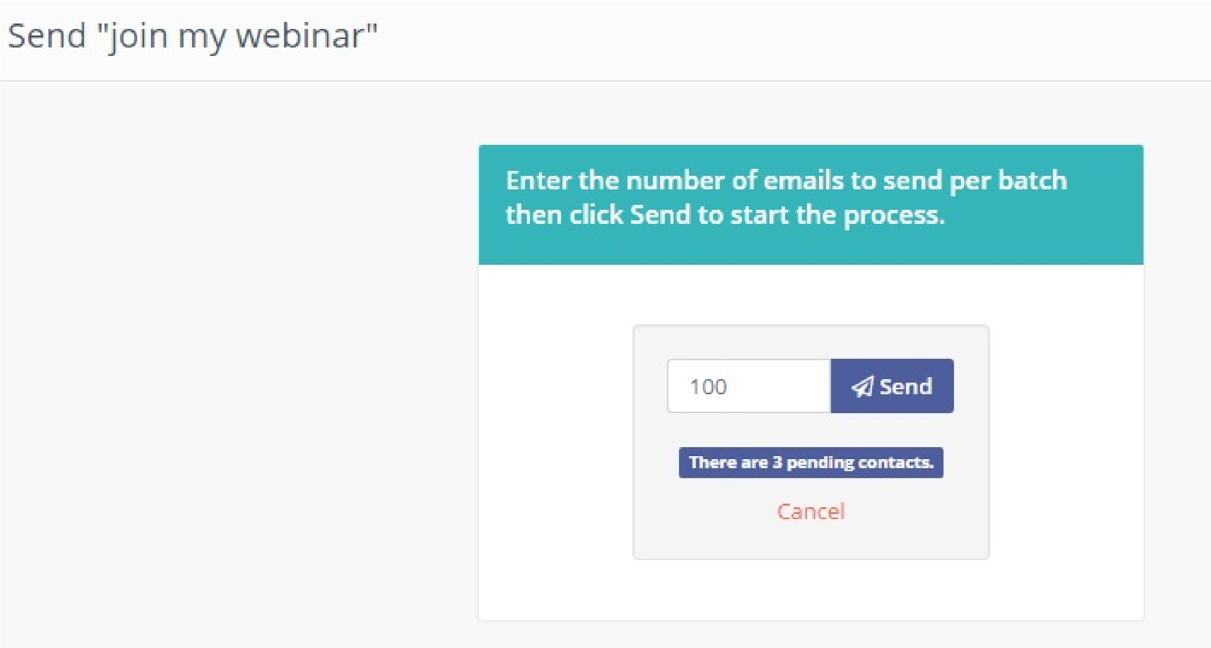
7. Open the email Builder and insert the *GotoWebinar Join Button* token:



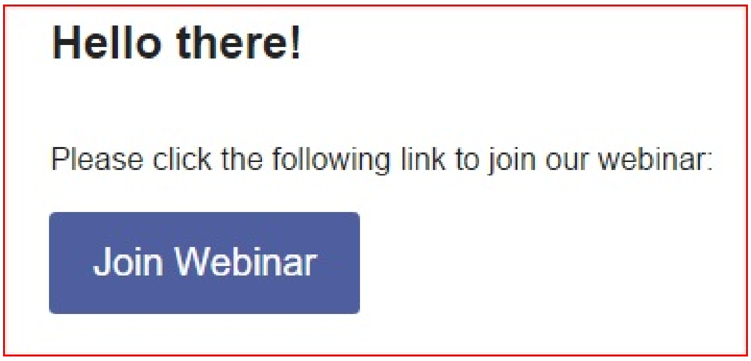
The button can be styled by overriding the `citrix-start-button` CSS class.

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

8. Send the email to the Segment contacts.



9. The email arriving in the new Contact's Inbox should include a button to join the webinar with the appropiate URL for the contact.



Update: How to Create a GotoWebinar Campaign From Scratch

Instructions and best practices for [Mautic] campaigns and emails in a GoToWebinar campaign - from Mautic Inc.

Mautic - Clearbit plugin

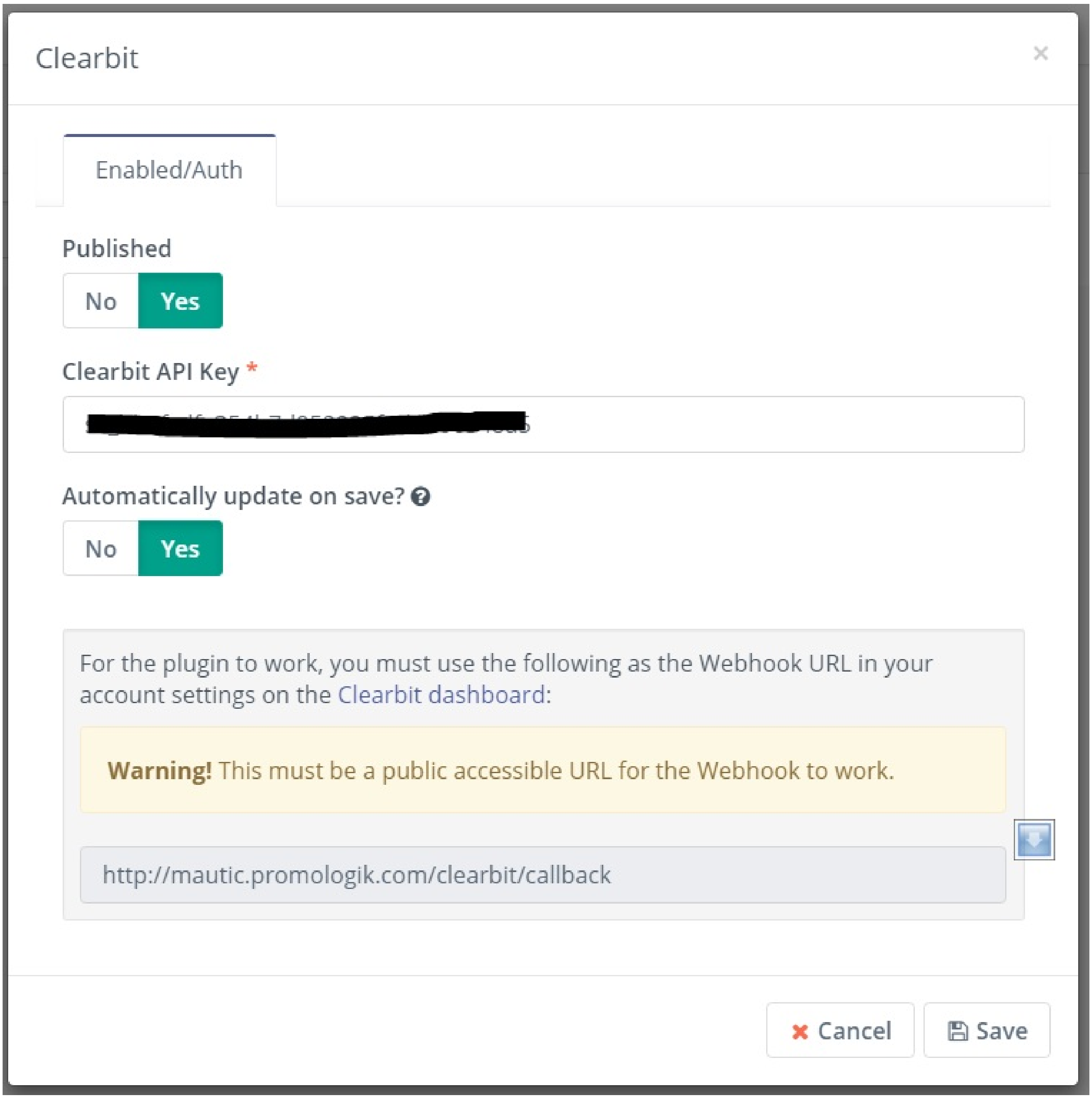
This plugin can:

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

Requirements

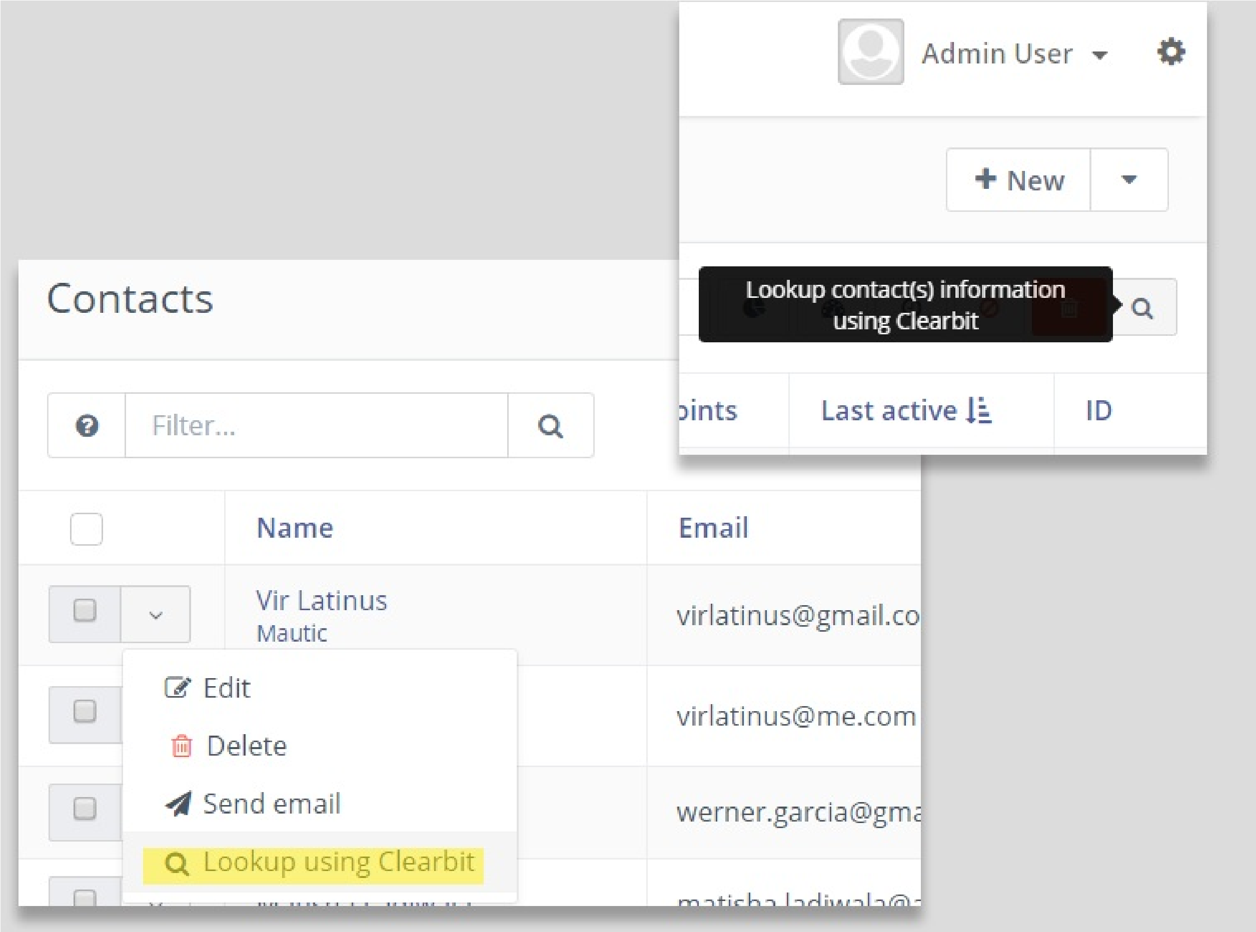
- Mautic installed on a publicly accessible URL. This plugin won't work on a localhost because callbacks from Clearbit to Mautic are necessary.
- Get a Clearbit API key

Authorize the plugin

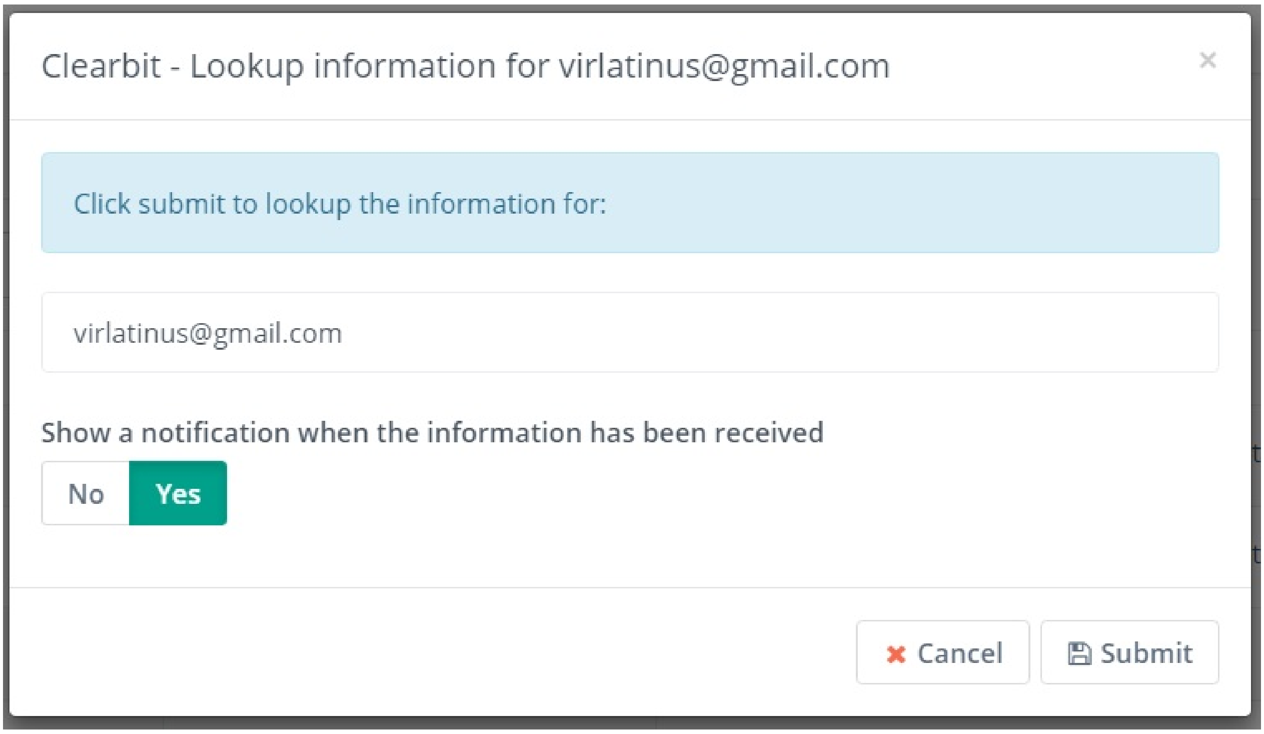


Usage

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 - Connectwise CRM plugin

This plugin can push/pull a contact to/from Connectwise Manage.

Requirements

- A Connectwise Manage account.
- Connectwise company id
- Connectwise api member with administrative role

Configure the Mautic Connectwise plugin

Authorize App

You will need your company id in order to authenticate the Connectwise plugin.

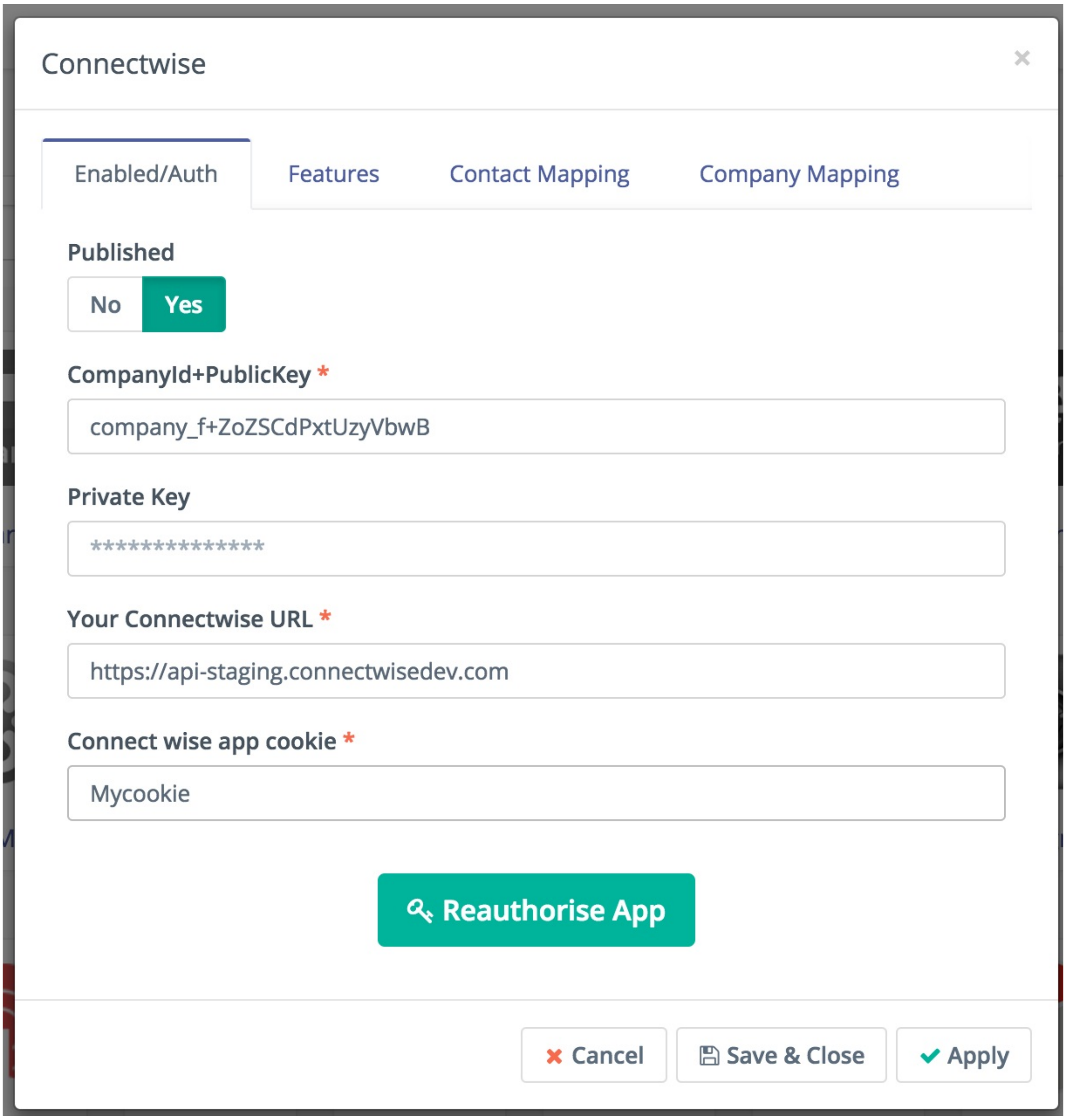
Use the thick client to create a new API member. Dowload think client from here.

1. Go to *System/member*
2. Create a new API member.

   You will also have a link to get your public and private keys.

3. Copy the public and private keys.

4. Insert the keys to the Mautic Connectwise plugin and authorize it.



5. Configure the field mapping.

Please map all fields marked in red, as these are required fields.

Features

Enabled features

- You can pull leads and/or push leads from and to the integration.
- Push leads is done through a Form action or a Campaign action.
- Pull leads is done through command line and it can be setup as a cron job.

Feature specific settings

- Select the objects you wish to pull or push records from. You can push contacts to the Contacts modules in connectwise.
- Pulling records will be done from Contacts module in Connectwise to Contacts in Mautic and Companies from

Connectwise will be pulled into Mautic companies.

Command to push/pull records from Connectwise

To push or pull records from Connectwise you need to run the Mautic integration commands:

Pull records from the Leads object in Connectwise

```
php app/console mautic:integration:synccontacts --integration=Connectwise
```

`mautic:integration:fetchleads` is a alias of this command.

Push activities to the Connectwise custom object described below

```
php app/console mautic:integration:pushactivity --integration=Connectwise
```

`mautic:integration:pushleadactivity` is a alias of this command.

Usage

Both commands take these parameters:

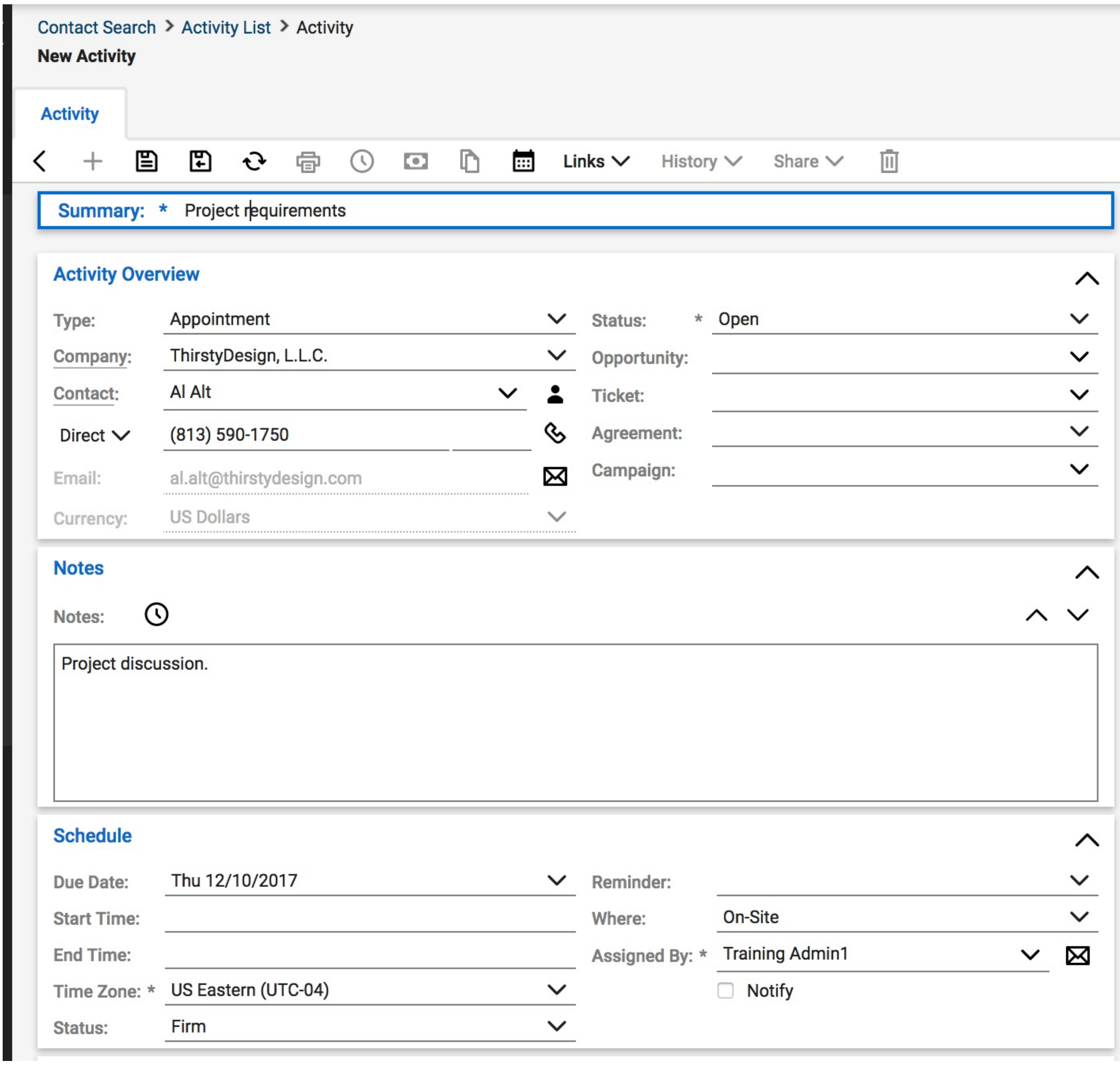
```
Usage:
  mautic:integration:pushactivity [options]
  mautic:integration:synccontacts [options]

Options:
  -i, --integration=INTEGRATION        Integration name. Integration must be enabled and authorised.
  -d, --start-date=START-DATE          Set start date for updated values.
  -t, --end-date=END-DATE              Set end date for updated values.
  -a, --time-interval[=TIME-INTERVAL]  Send time interval to check updates on Connectwise, it should be
                                       a correct php formatted time interval in the past eg:(-10 minutes)
```

`--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".

Test the plugin

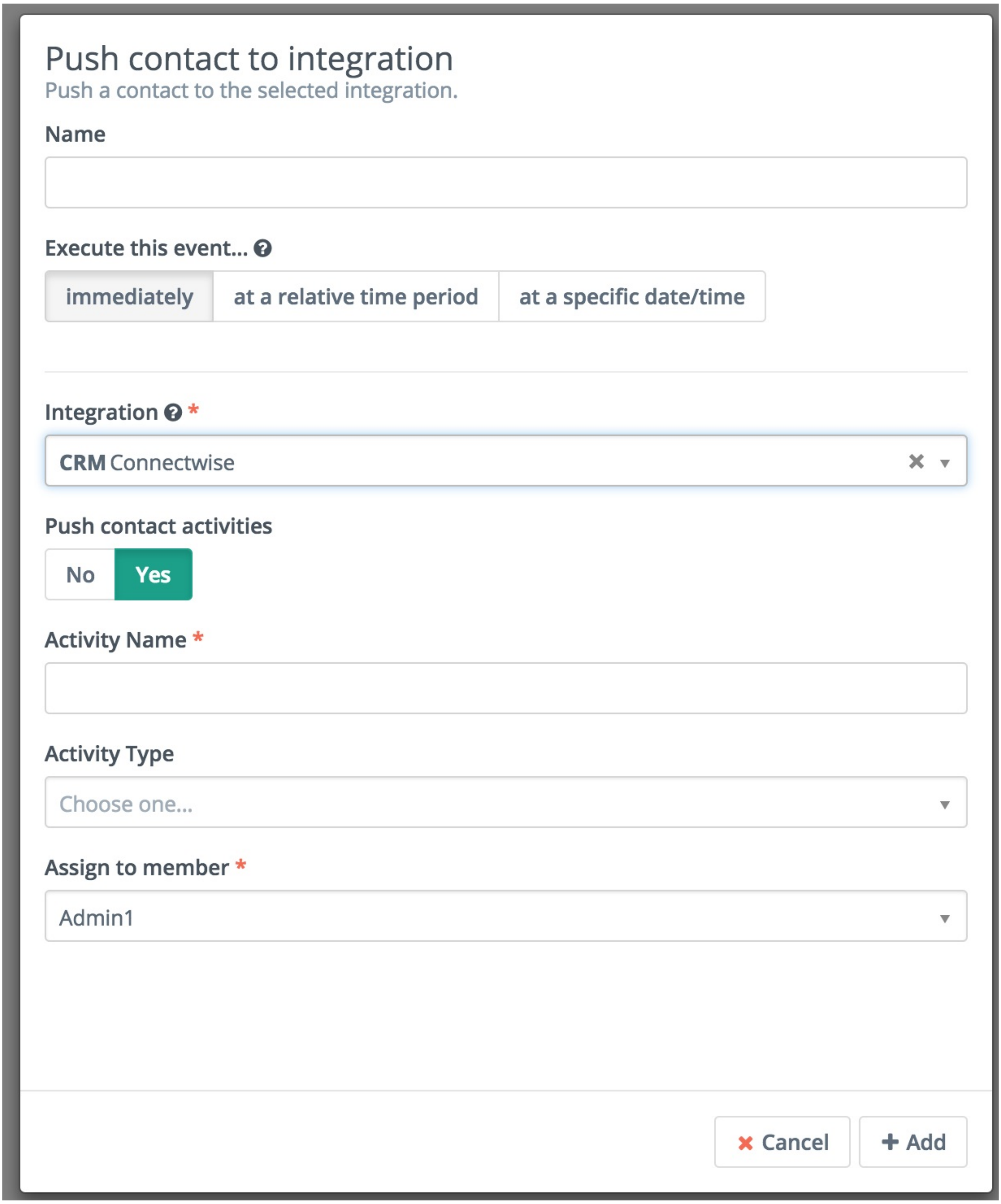
Follow these steps to test the integration.

Connectwise Contact Activities



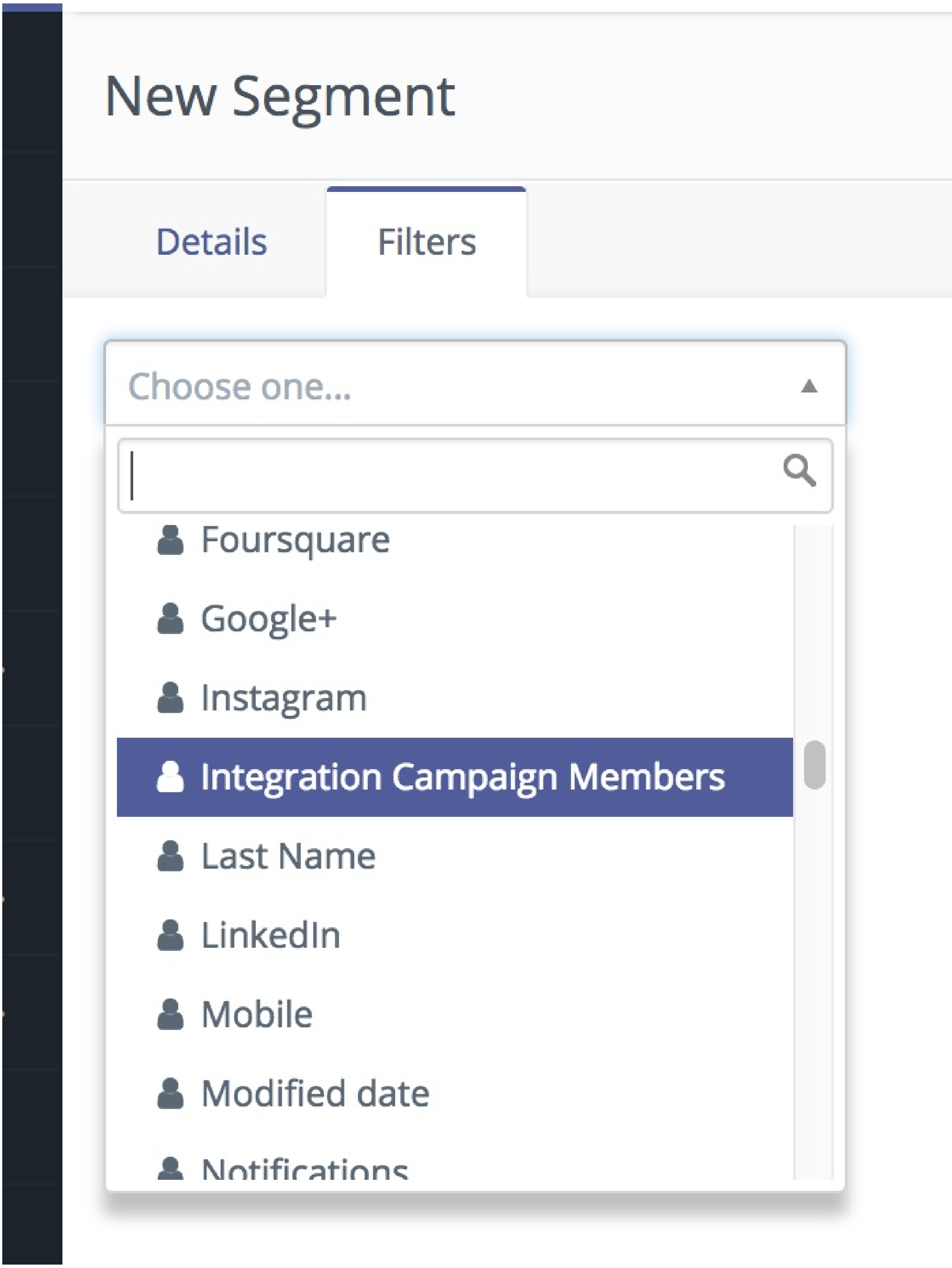
You can create new contact activities in Connectwise through a Campaign action. To do so follow these steps.

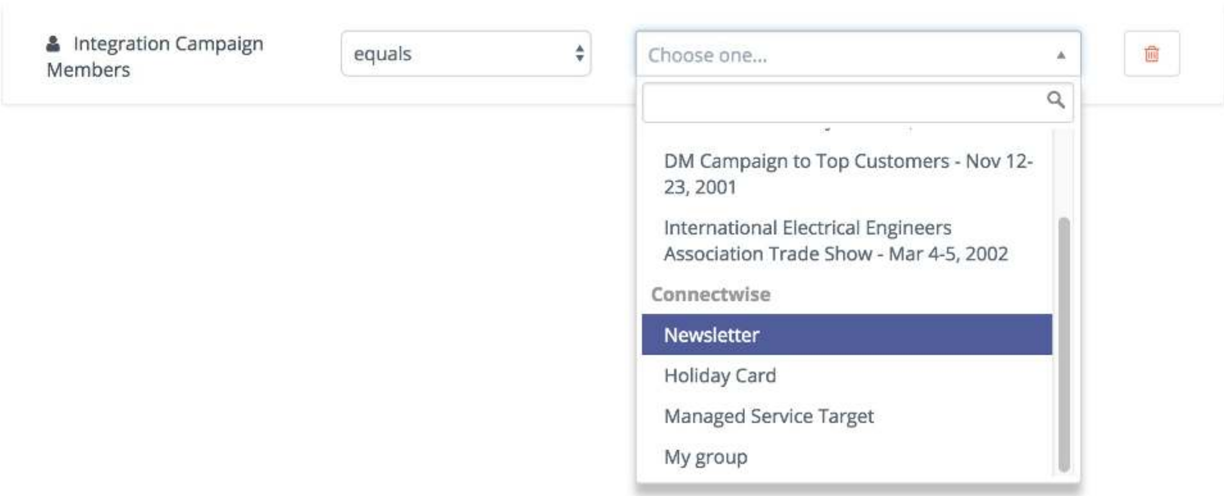
1. Create a new campaign or use an existing one.
2. Use a push to integration action and select Connectwise. You should see the option to push activites.
3. Select No if you only wish to push campaign contacts to your Connectwise integration.
4. Select Yes and fill in required fields if you wish to push contacts and ativities related to each campaign contact. Activity name and member owner are required fields.



In Mautic Segments

You can create a Mautic Segment composed of contacts that are in a Connectwise campaign group. To do this create a segment filter ***Integration Campaign Member*** option, then in the filter properties select the name of the campaign group you wish to get group members from.


New Segment
Details
Filters
Choose one...
Foursquare
Google+
Instagram
Integration Campaign Members
Last Name
LinkedIn
Mobile
Modified date
Notifications


Integration Campaign Members
equals
Choose one...
DM Campaign to Top Customers - Nov 12-23, 2001
International Electrical Engineers Association Trade Show - Mar 4-5, 2002
Connectwise
Newsletter
Holiday Card
Managed Service Target
My group

Mautic - FullContact plugin

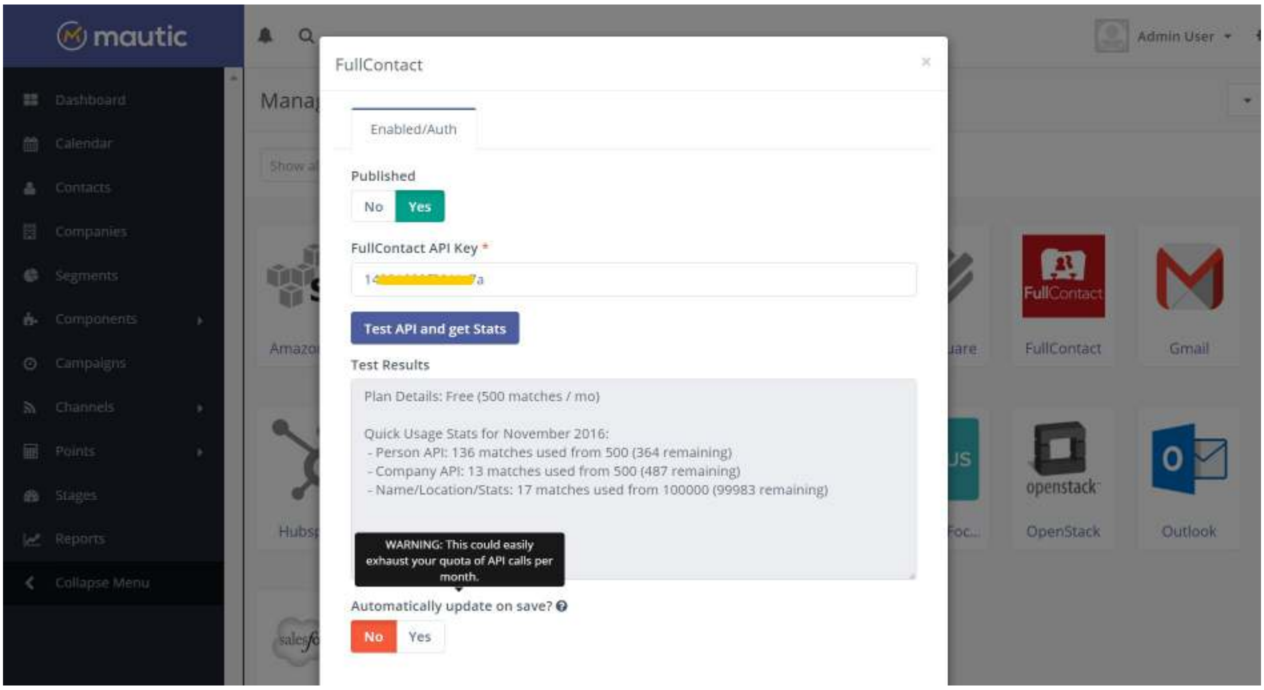
This plugin can:

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

Requirements

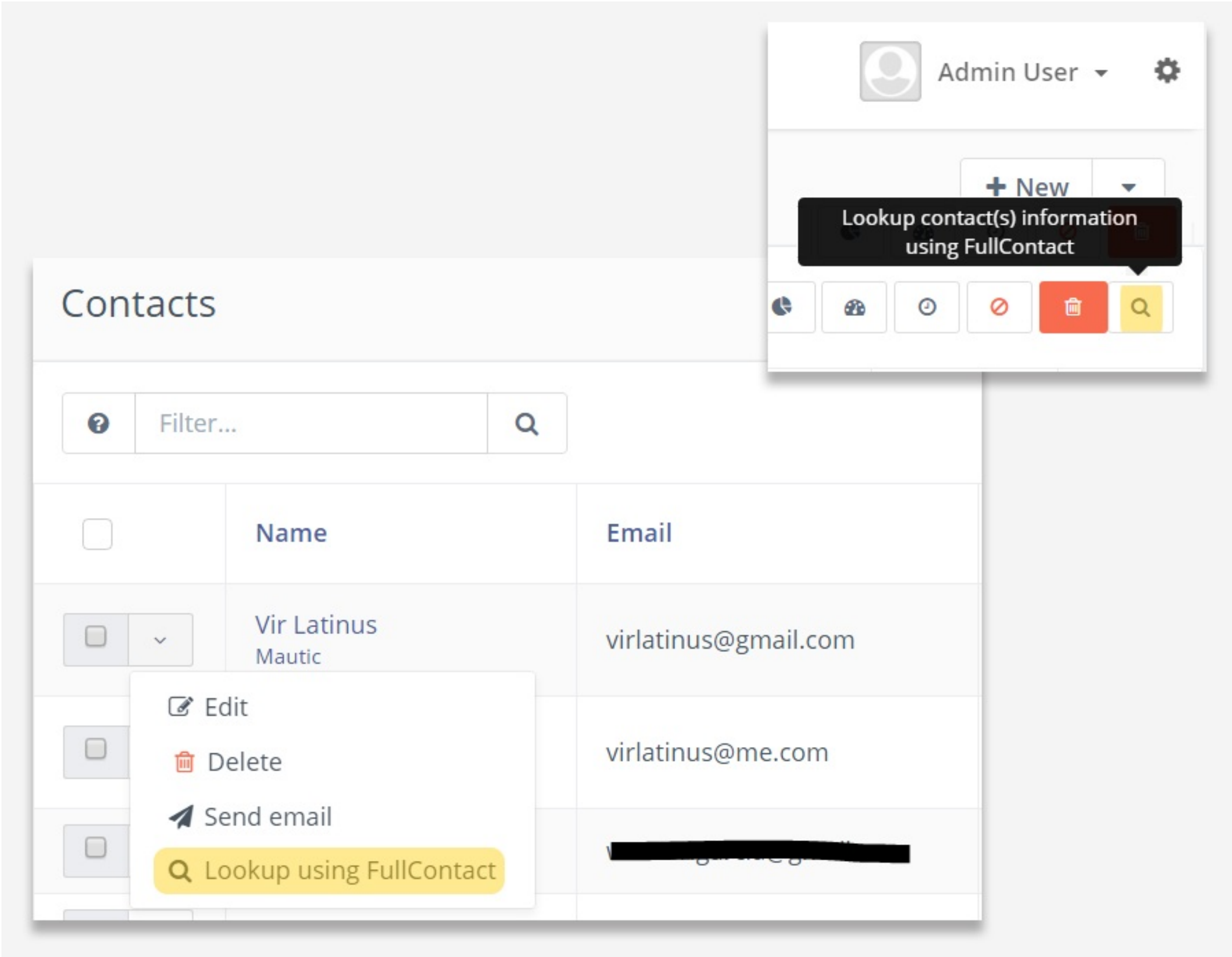
- Mautic installed on a publicly accessible URL. This plugin won't work on a localhost because callbacks from FullContact to Mautic are necessary.
- Get a Full Contact API key

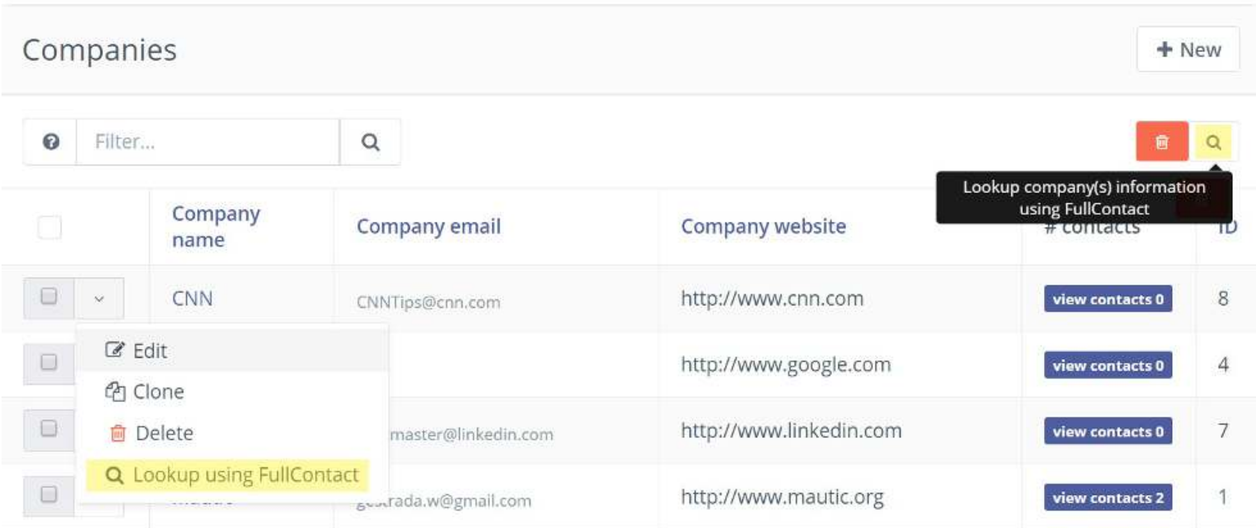
Authorize the plugin



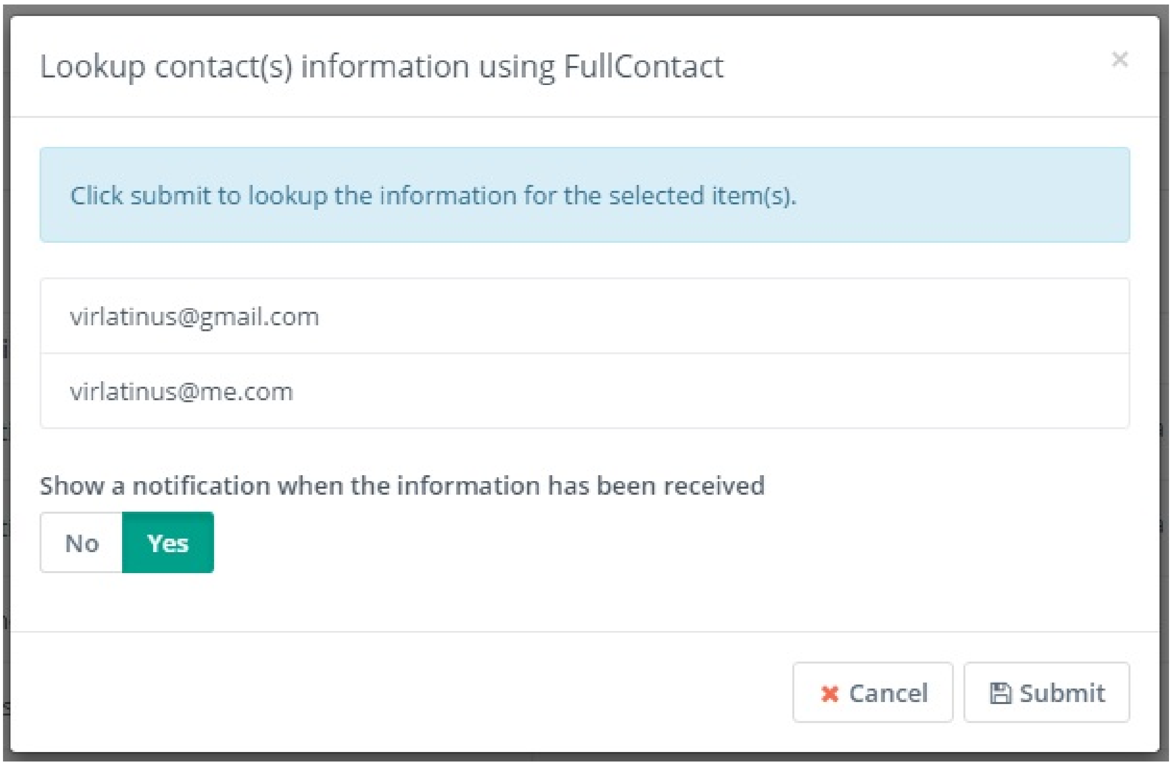
Usage

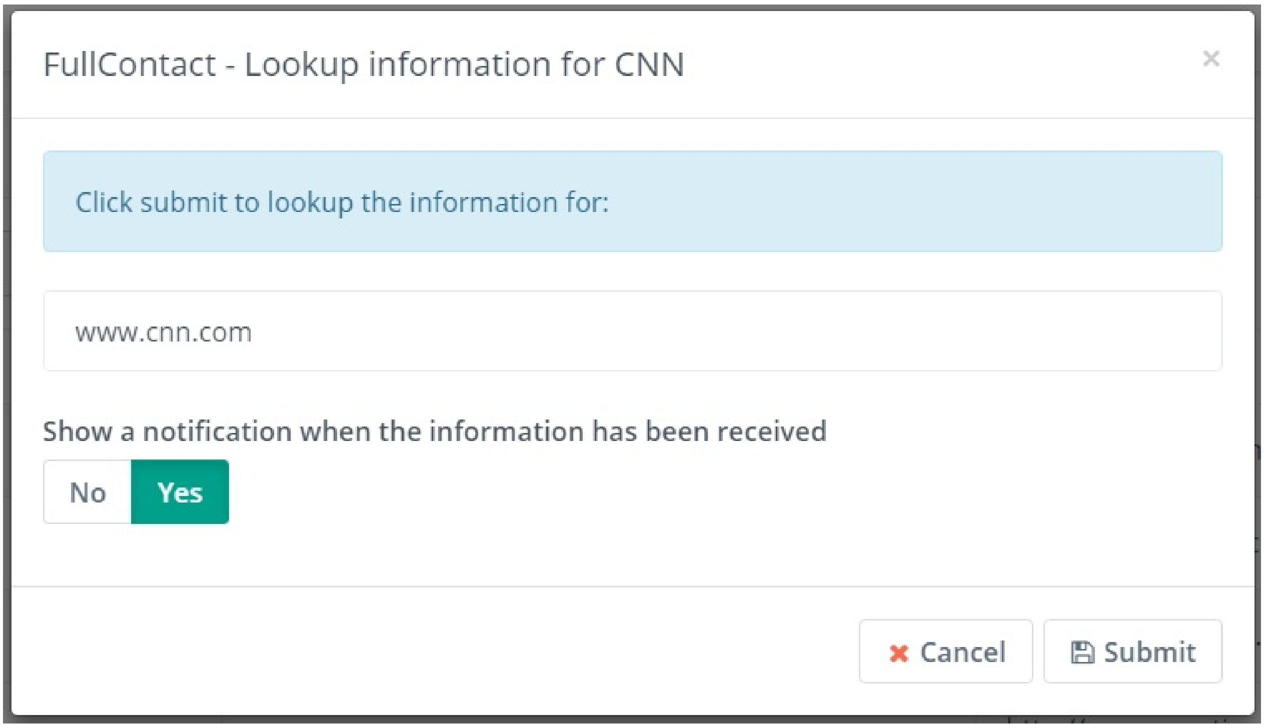
On the contacts and on the companies pages, there are two buttons: One on the row dropdown menu, and another one on the toolbar at the top:





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

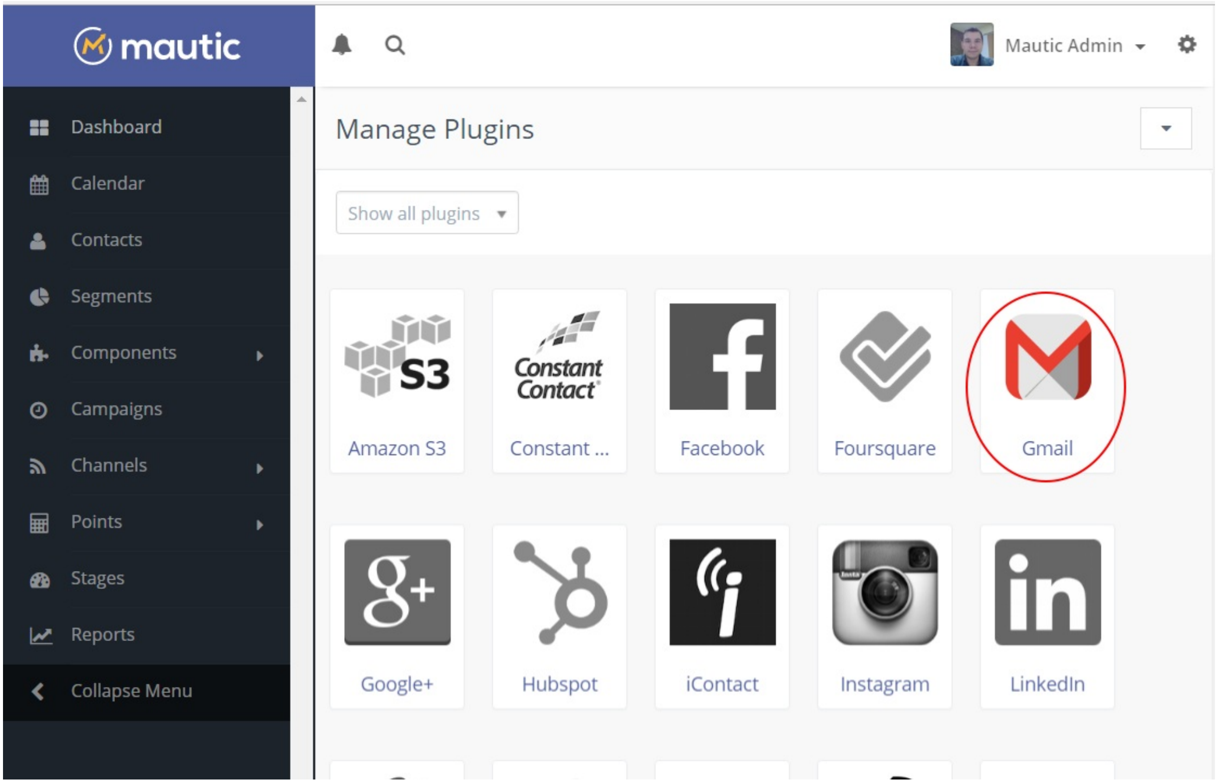
This plugin allows for the Mautic Helper Chrome Extension to keep track of emails sent to leads from within Gmail.

Requirements

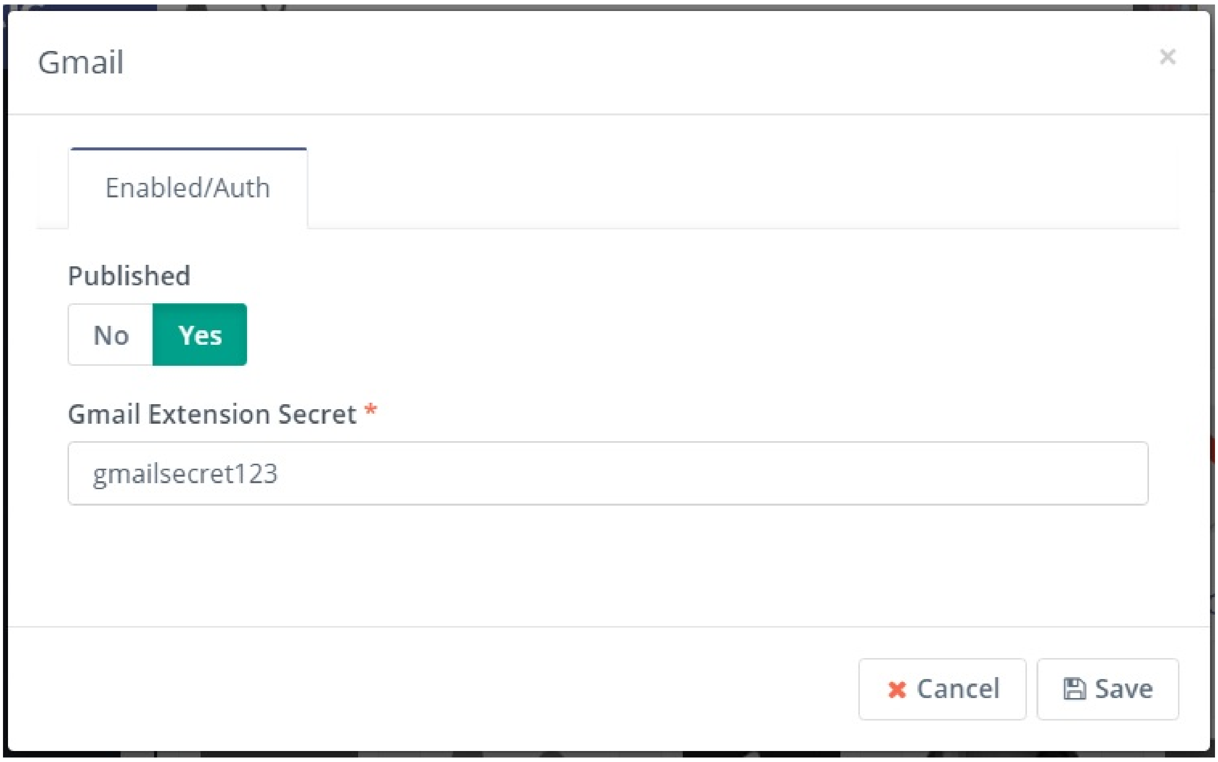
- Mautic installed on a publicly accessible URL.
- Gmail account (for email tracking).
- Mautic Helper Chrome Extension

Configure the plugin

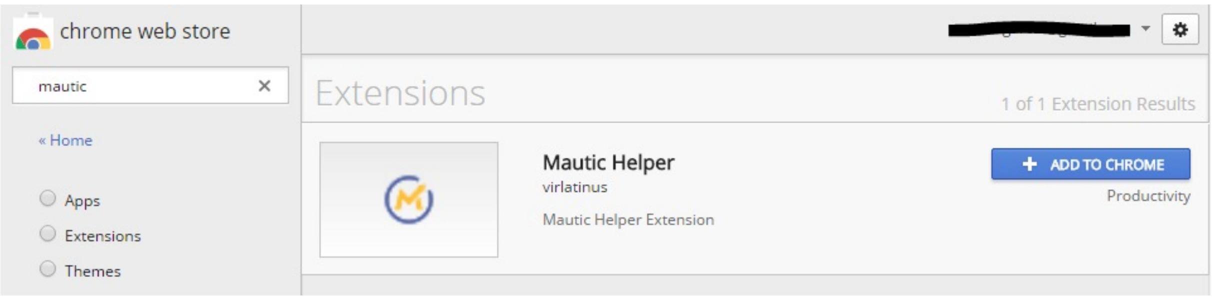
1. Install the Mautic plugin as usual. It will appear on the plugins page in Mautic.



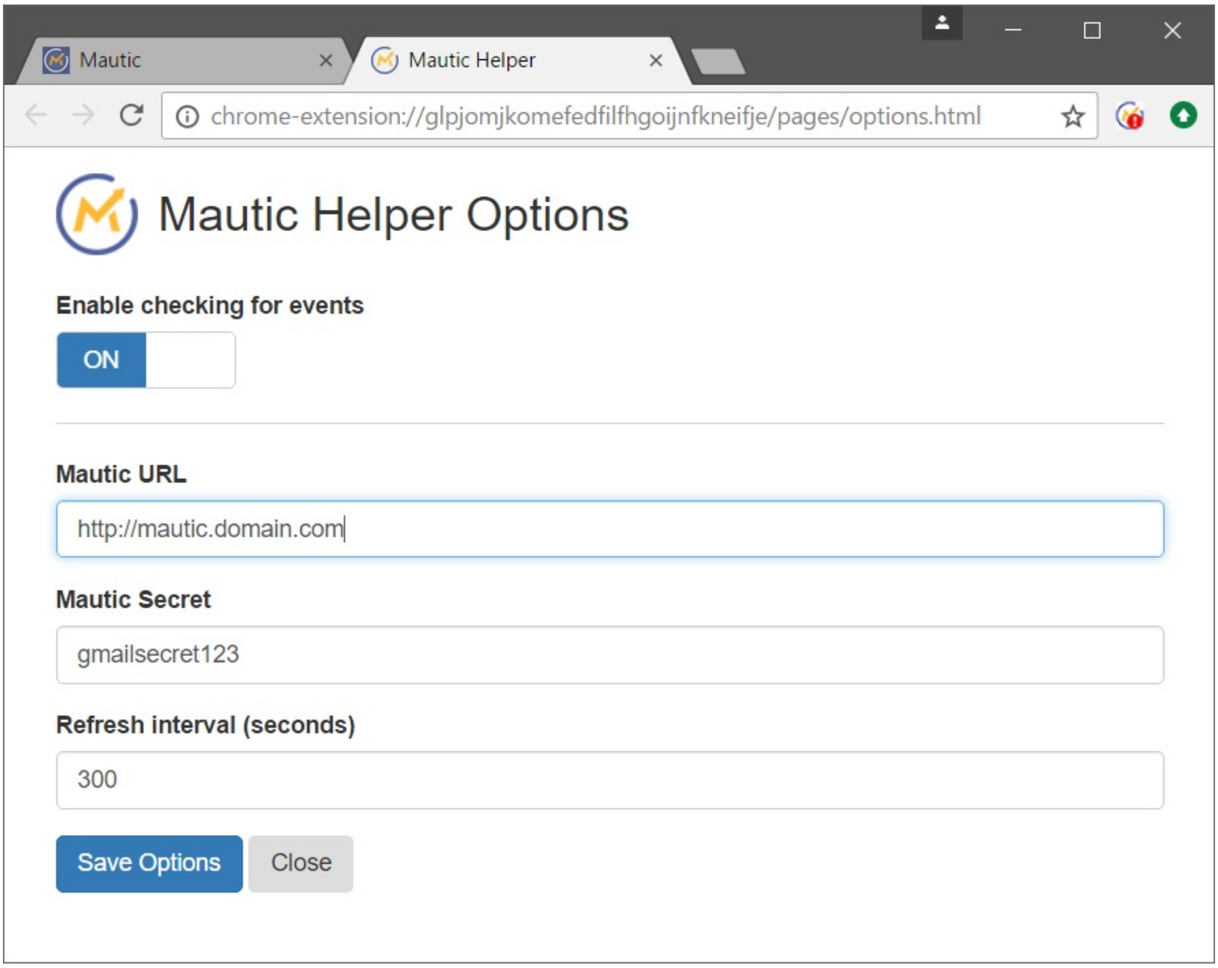
2. Click on the Gmail plugin button and enter a secret or key to validate the Mautic Helper Chrome Extension



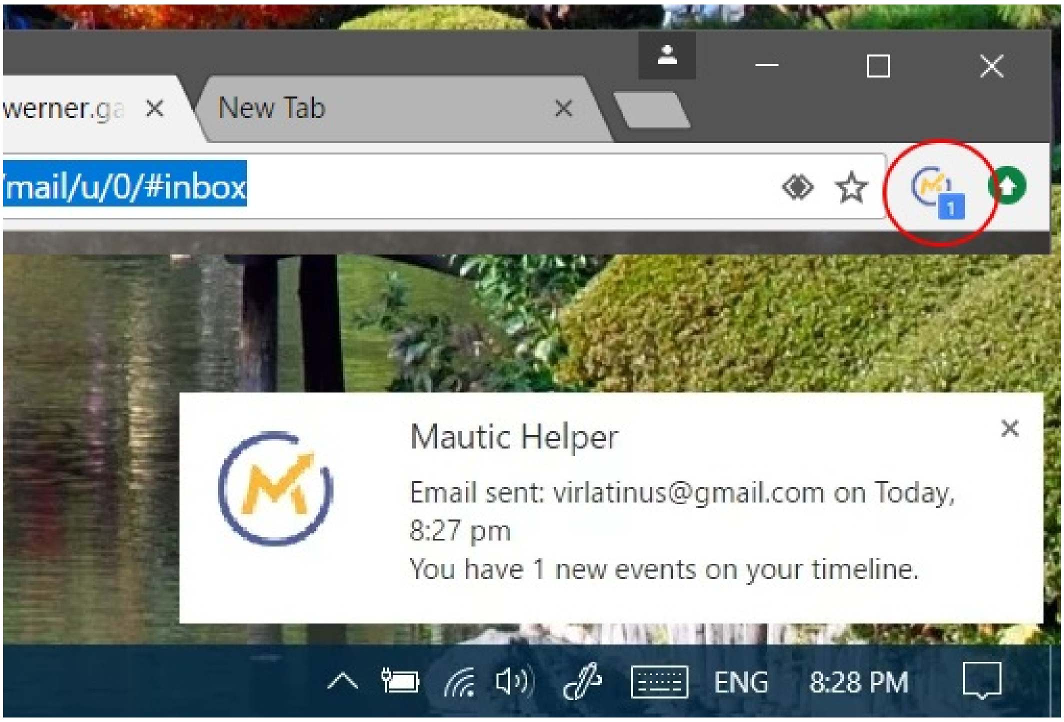
3. Install the Mautic Helper Chrome Extension from the Chrome Web Store



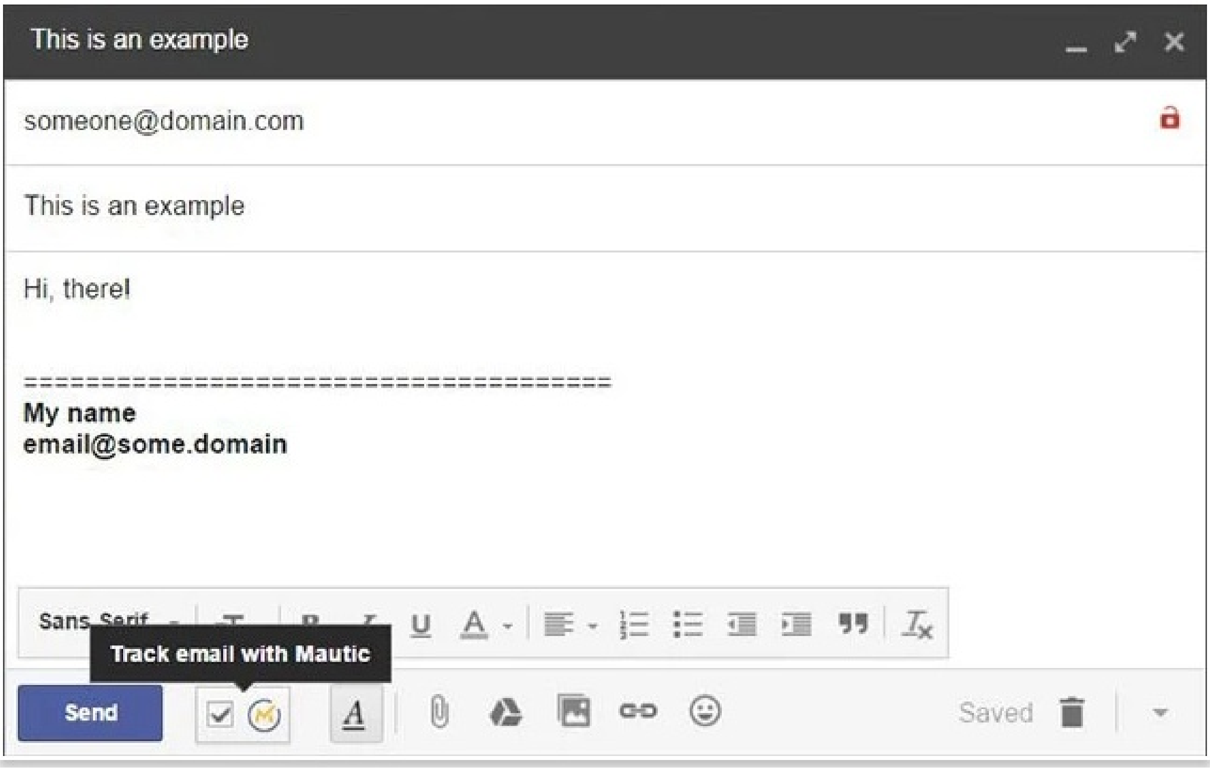
4. Configure the extension using the options page that will automatically be displayed. (Remember to use the same secret you entered in Mautic)



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

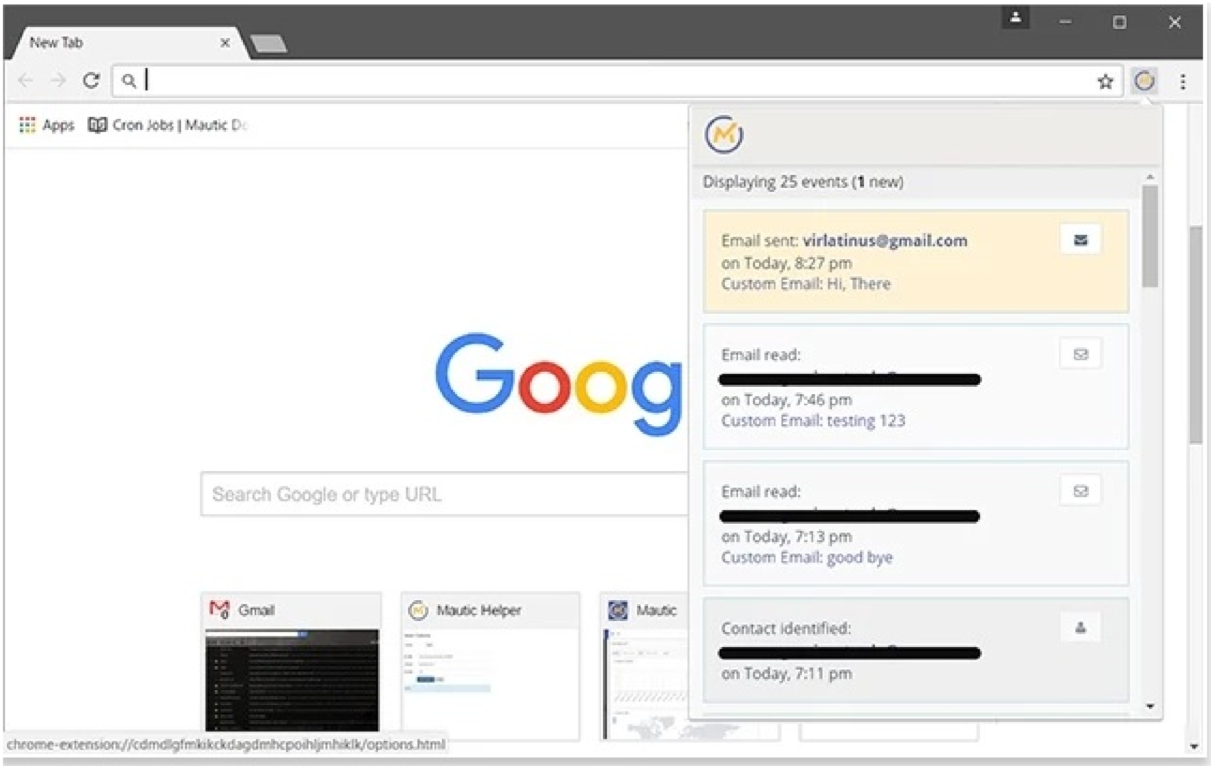


6. To track an email sent to a lead, click the Track Email button on the Compose window in Gmail



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%2BCQ16HdgmeAenKewpflU3lvfIO6nGyy75HNXO8LQAN3984R2X5tqMpkwnjOejrfg19%2FBJIHBJsskS3M1MOvOedChUA5HaPBAsp54a7UyBH%2BAw9YWECRrsMc6PHvFd2iR0NfW1QbcjUDwMjhctYqqq0YxkQU6SqMhNxi85GeoD8p0134zaBom%2By4ezIPMxTPFeCH5TLzI%2BdgizeEu5aIUQixmIubjSG5WAY8bC8kyC%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

Mautic - Hubspot CRM plugin

Mautic can push contacts to Hubspot CRM based on Contact actions or Point Triggers.

> **Note**
>
> In this document, there may be references to outdated terminology such as
>
> - *leads*,
> - *lists* or *lead lists*, and
> - *anonymous leads*
>
> In Mautic version `1.4`,
>
> - *leads* were renamed to ***contacts***
> - *lead lists* were renamed to ***segments***
> - *anonymous leads* were renamed to ***visitors***

Hubspot API key

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

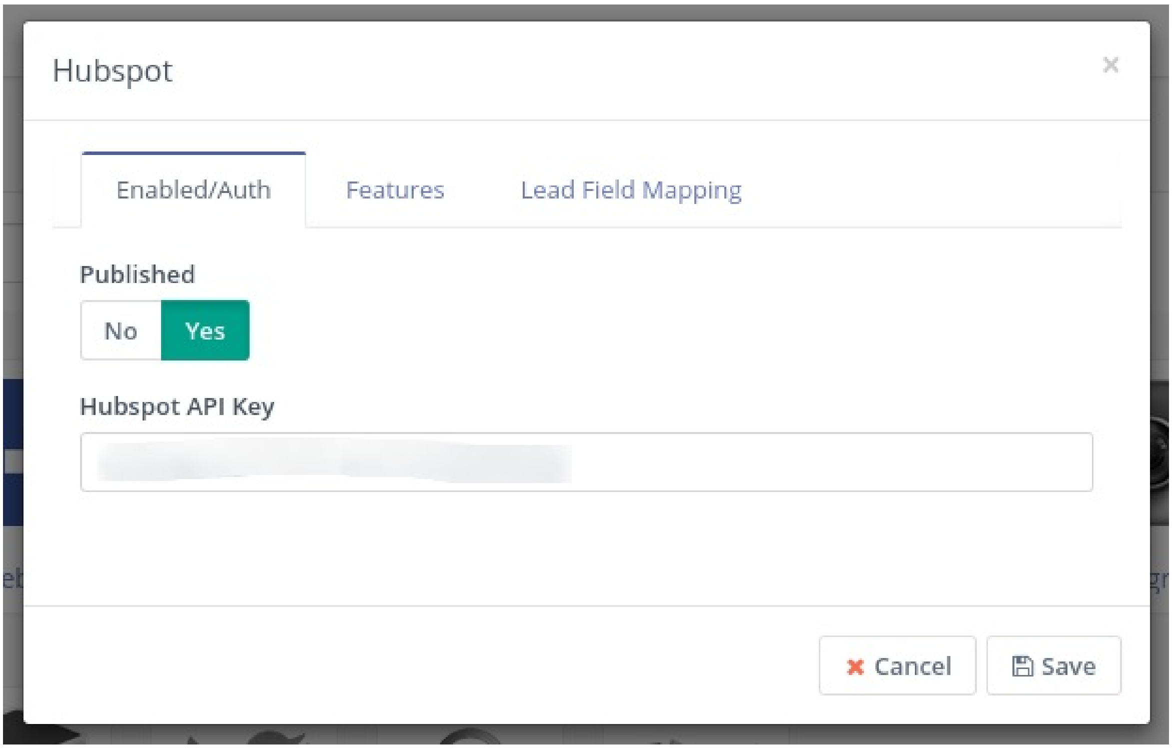
Configure the Hubspot CRM plugin

1. Create a Hubspot CRM account if you don't have one already.

2. Open the Hubspot Plugin configuration

    - Paste the API key into the *Hubspot API key* input field.

    - If you want to use the plugin, set the *Publish* switch to *Yes*.



3. In the *Features* tab select *Push contacts to this integration* checkbox.

   It is checked by default. If you uncheck it, the plugin will not push contacts to Hubspot CRM any more.

4. Configure the field mapping.

5. Save the plugin configuration.

Test the plugin

Follow these steps to test the integration.

Troubleshooting

If the contact has not been created, ensure the email address you tested with is valid. Hubspot will only create a new contact when the email address is valid.

Credit

This plugin had been developed by @gpassarelli.

iContact integration

Mautic can push contacts to iContact based on Contact actions or Point Triggers.

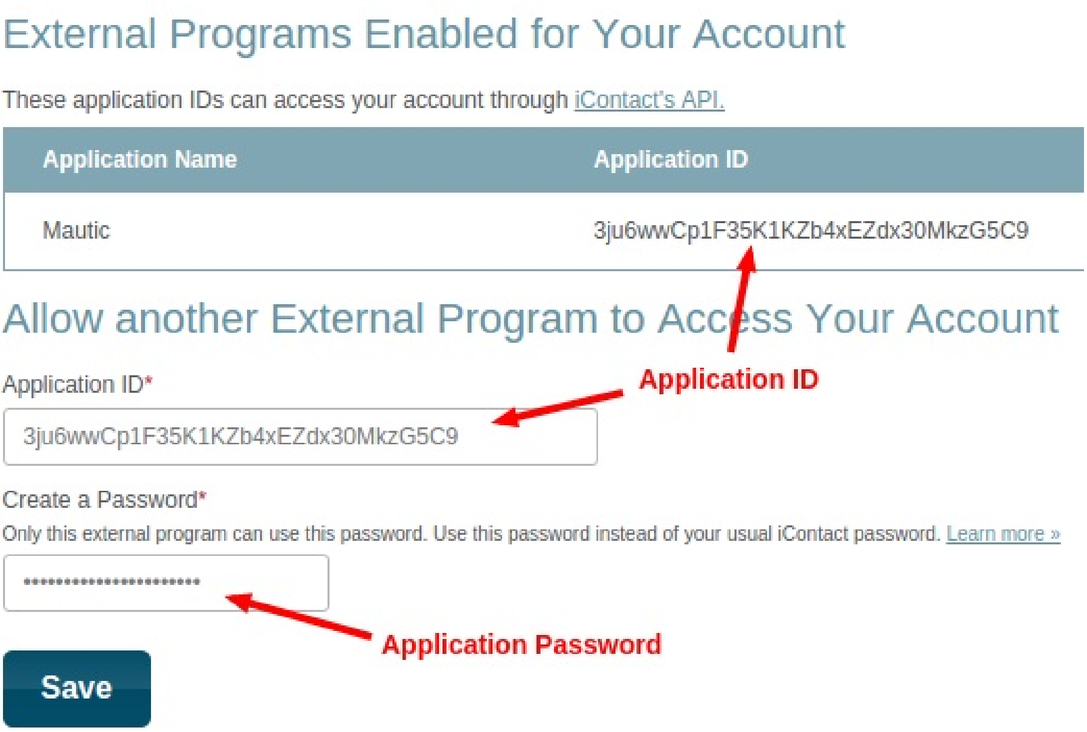
> **Note**
>
> In this document, there may be references to outdated terminology such as
>
> - *leads*,
> - *lists* or *lead lists*, and
> - *anonymous leads*
>
> In Mautic version `1.4`,
>
> - *leads* were renamed to ***contacts***
> - *lead lists* were renamed to ***segments***
> - *anonymous leads* were renamed to ***visitors***

Authorize

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

Follow the tutorial to create your iContact APP.

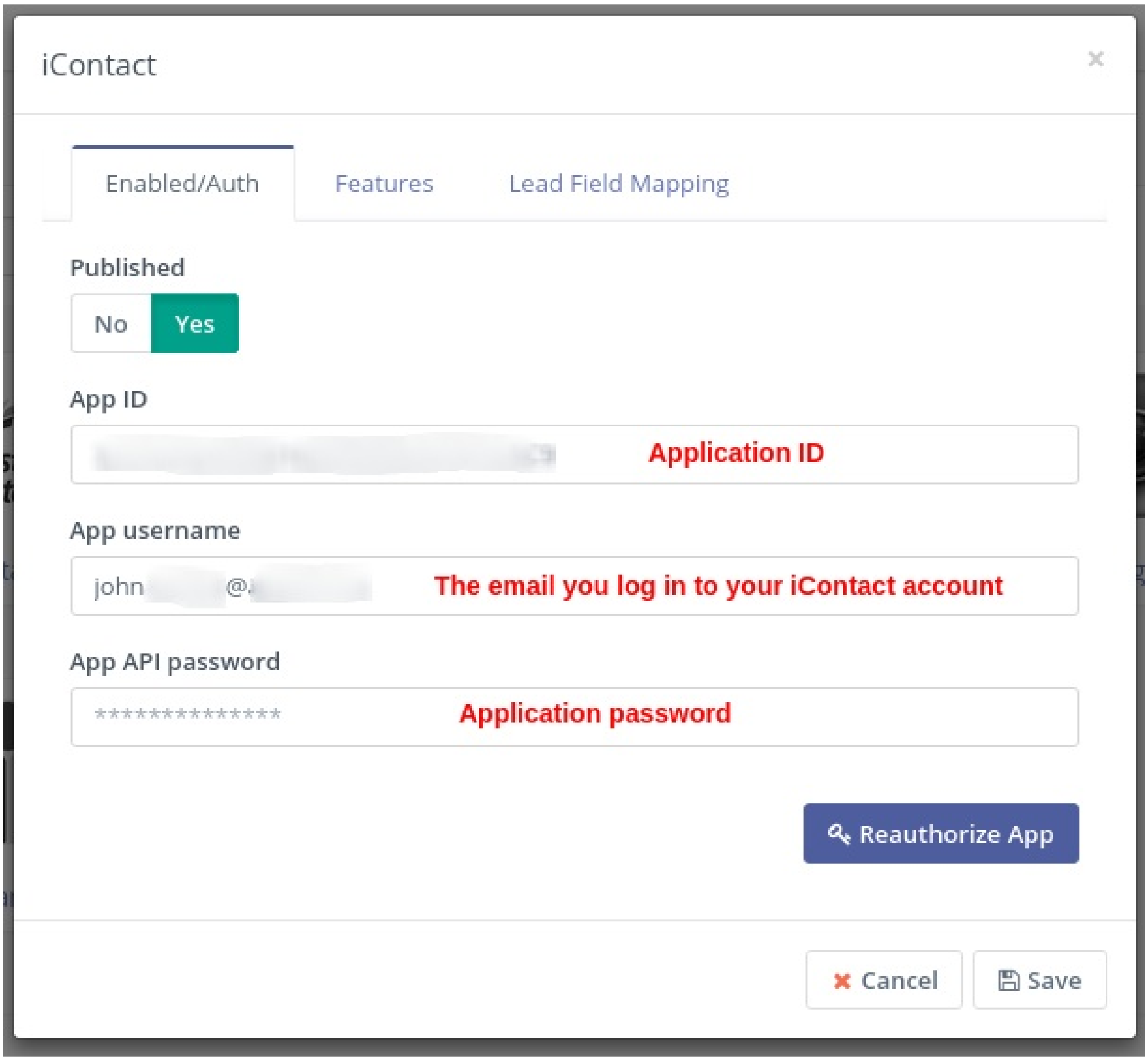
When you have your APP created, you should be able to see this screen:



Configure the plugin

1. Fill in the new credentials for Mautic - iContact integration:

- APP ID = the Application ID you created
- APP username = the email you use to log into your iContact account. (Not the APP name)
- APP password = The password chosen when saving the APP.



2. Navigate to the *Features* tab in the plugin configuration modal box.

   i. Select the *iContact* Segment where the Mautic Contacts should be pushed into.

      There should be one Segment created by default.

   ii. In the *Features* tab select *Push contacts to this integration* checkbox.

      It is checked by default. If you uncheck it, the plugin will not push contacts to iContact any more.

3. Configure the field mapping.

4. Save the plugin configuration.

Test the plugin

Follow these steps to test the integration.

MailChimp integration

Mautic can send Contacts to MailChimp based on Contact actions or Point Triggers.

Version notes

- For Mautic 1.2.3 and later, the authentication is based on the API key.

  This is covered in this document.

- For Mautic 1.2.2 and older

  - a MailChimp app has to be created
  - the authentication is made via oAuth2
  - Client key and secret credentials are needed for authentication
  - SSL (https) connection is required

This plugin is backward compatible.

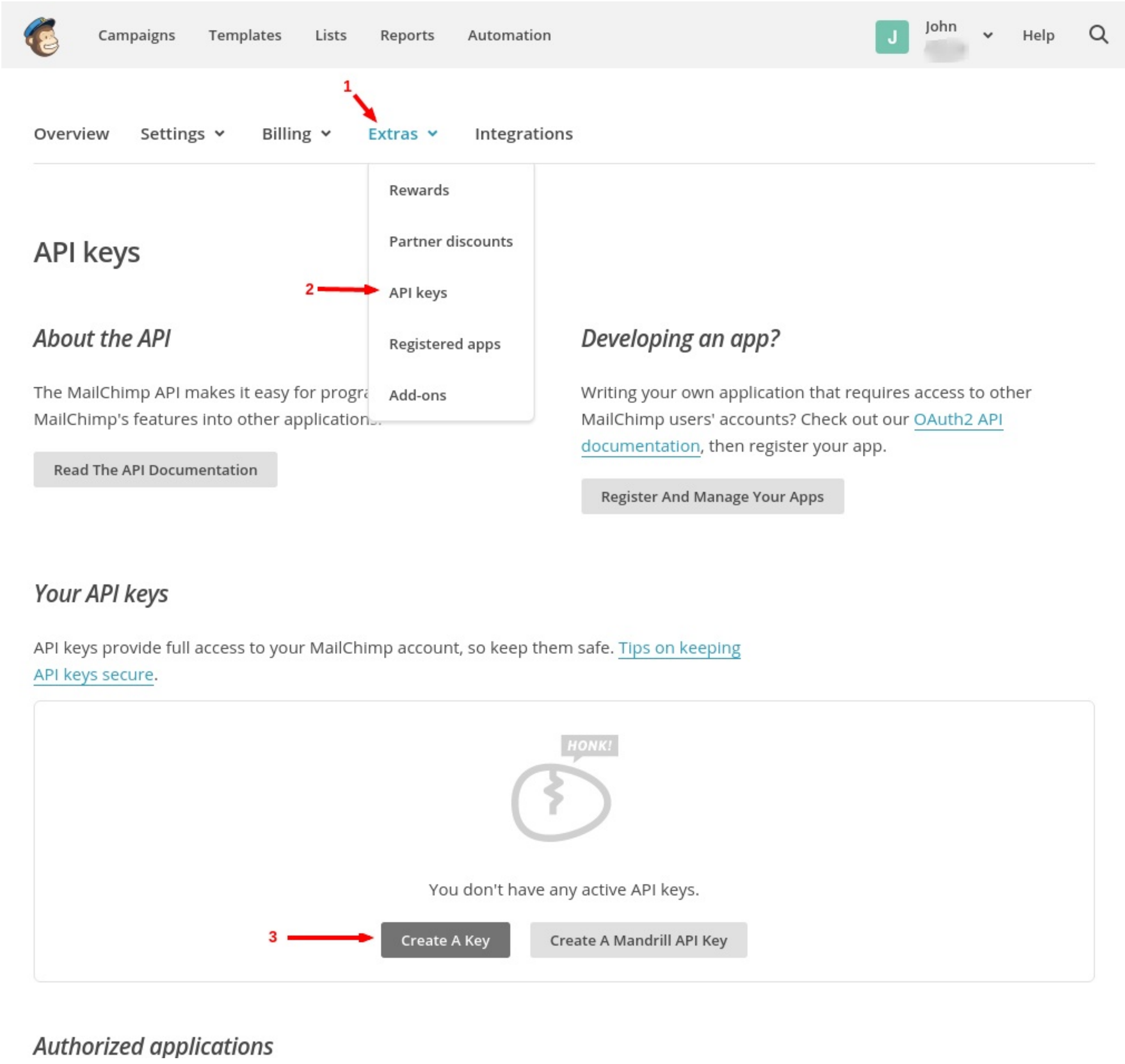
- If the client ID is filled, the plugin will use oAuth2.
- If the client ID is empty, the plugin will let you insert the API key.

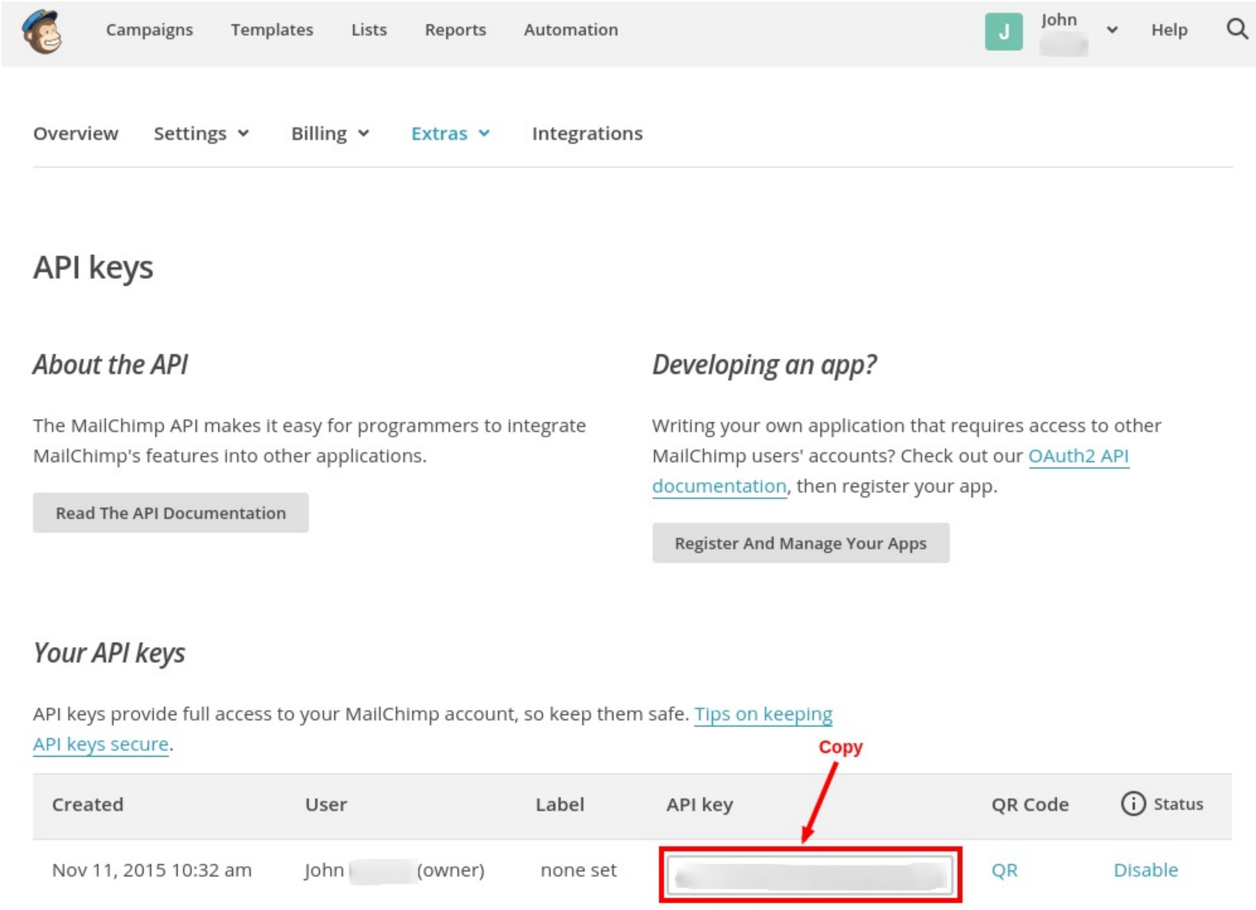
> **Note**
>
> In this document, there may be references to outdated terminology such as
>
> - *leads*,
> - *lists* or *lead lists*, and
> - *anonymous leads*
>
> In Mautic version `1.4`,
>
> - *leads* were renamed to ***contacts***
> - *lead lists* were renamed to ***segments***
> - *anonymous leads* were renamed to ***visitors***

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
API keys
2
API keys
Registered apps
Add-ons
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



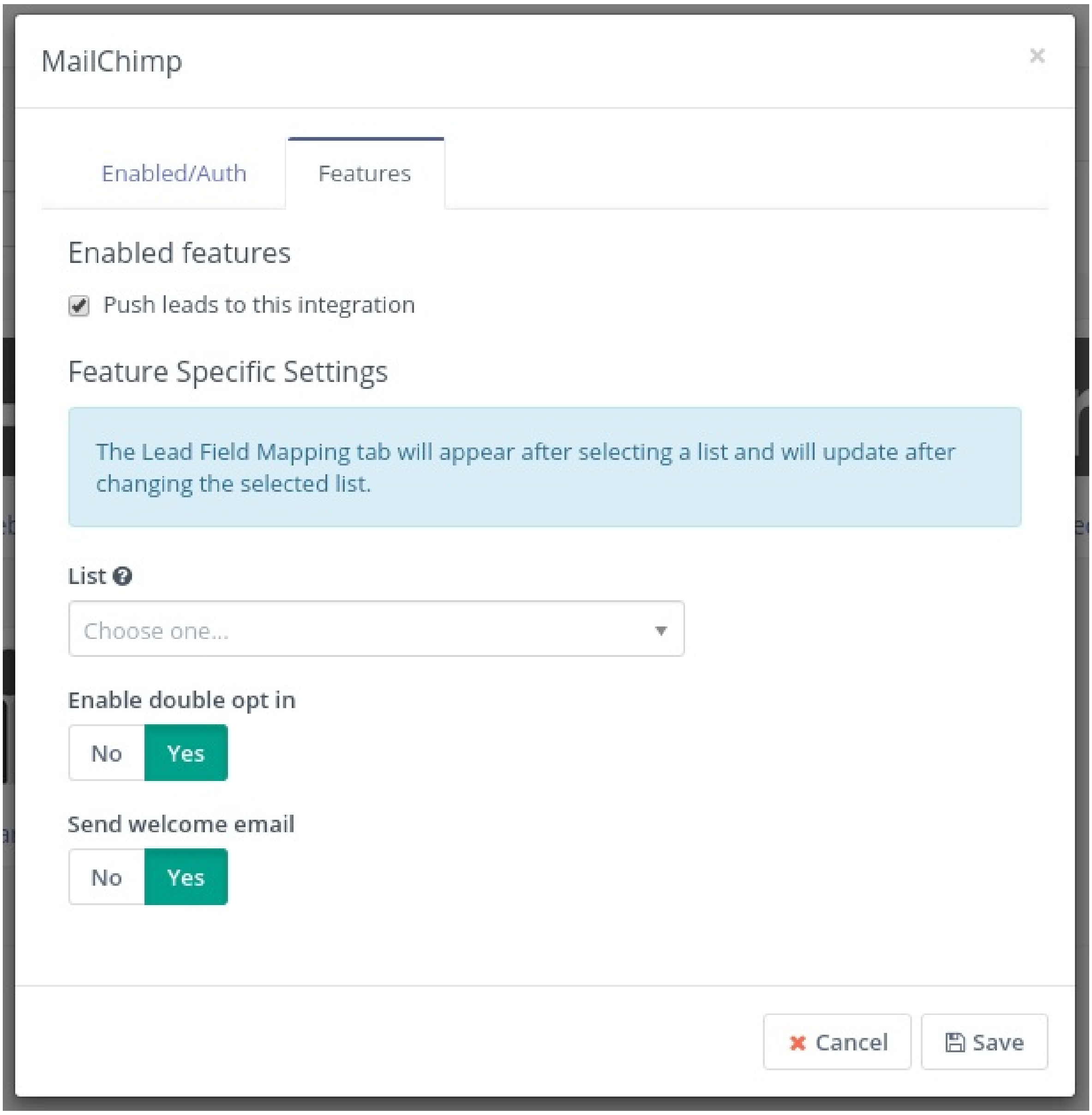
Authorize Mautic - MailChimp plugin

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.



1. Select the Segment.

   If you don't have a segment in MailChimp created yet, go to *MailChimp dashboard / Segments / Create List* and create one.

2. Save the plugin configuration

3. Open it again.

   The *Contact Field Mapping* tab should appear now.

4. Configure the field mapping.

Other configuration options

- **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.

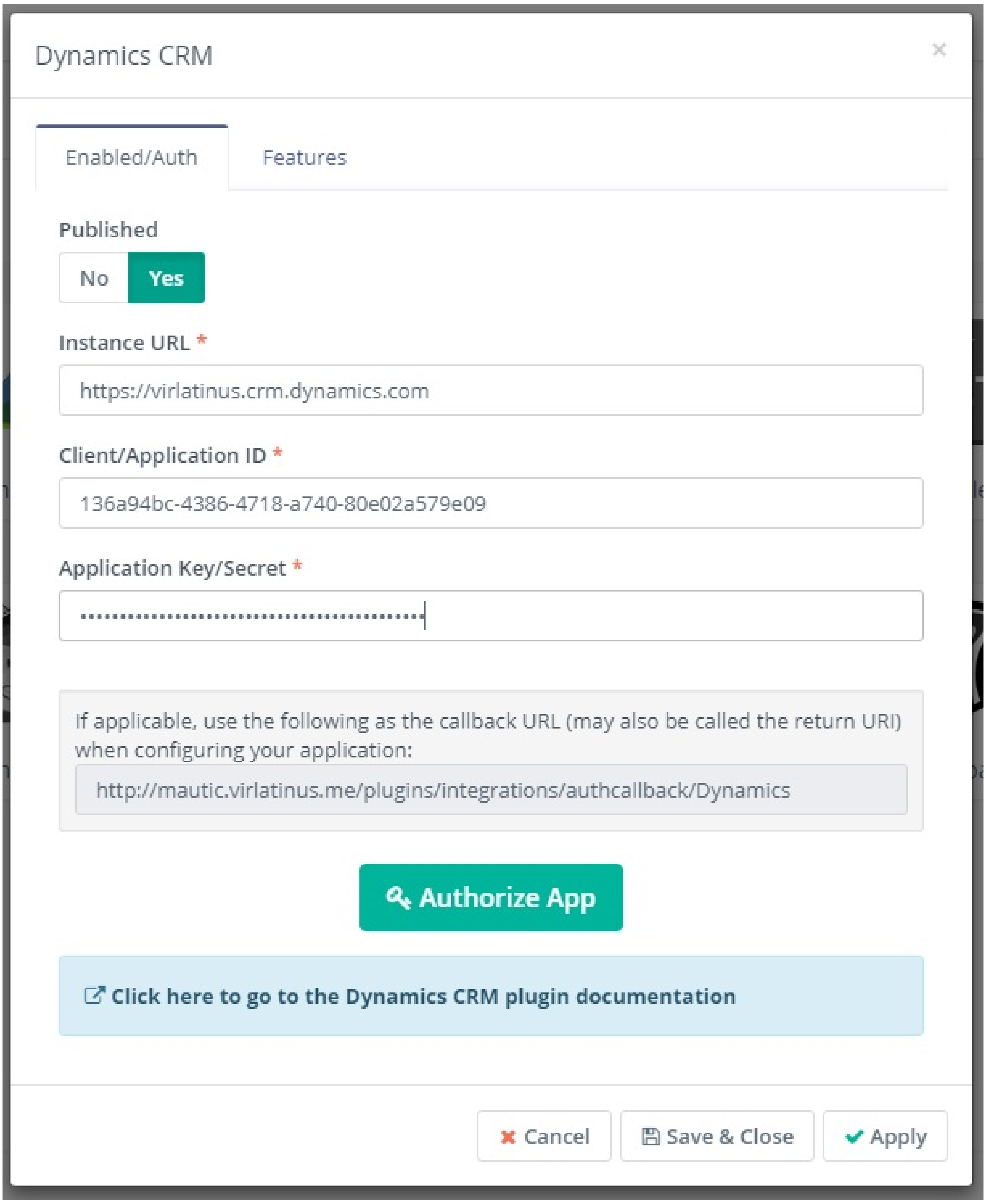
Mautic - Microsoft Dynamics CRM bi-directional plugin

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

1. 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.

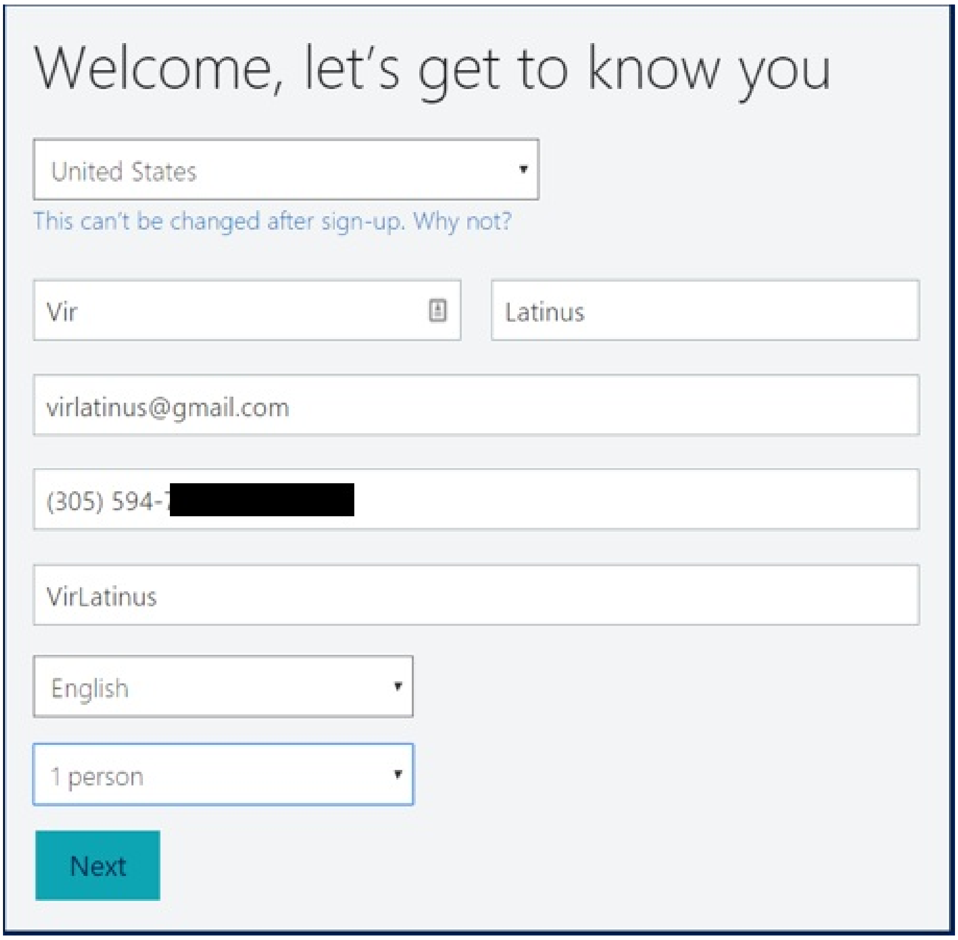


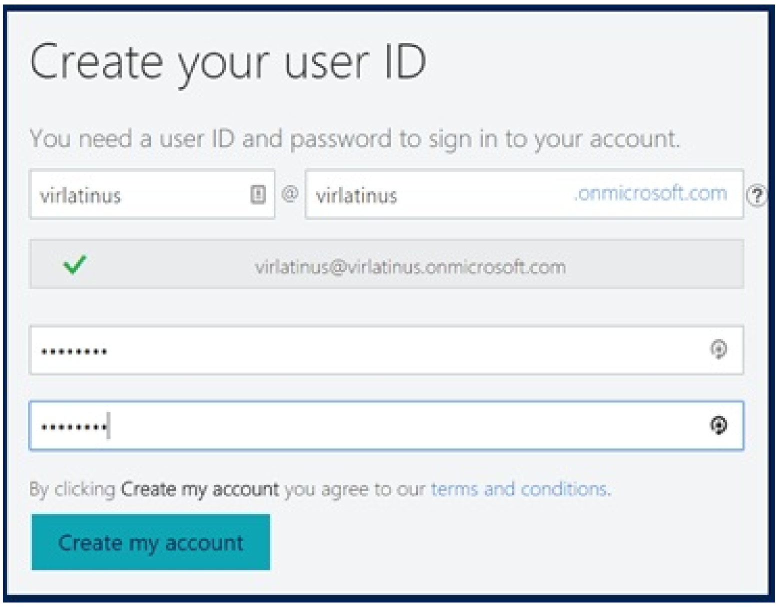
2. Select the features you like in the Features tab. *Push contacts to this integration* checkbox is checked by default.
3. Configure the field mapping.
4. Save the plugin configuration.

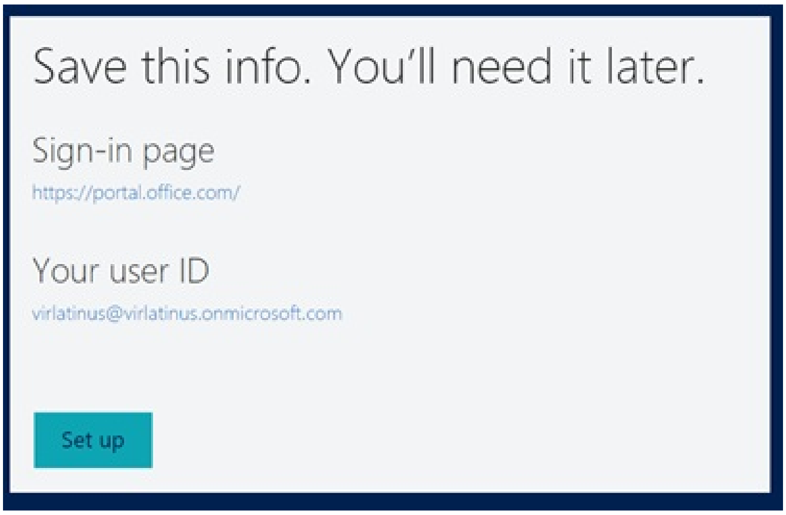
Set Up Dynamics 365

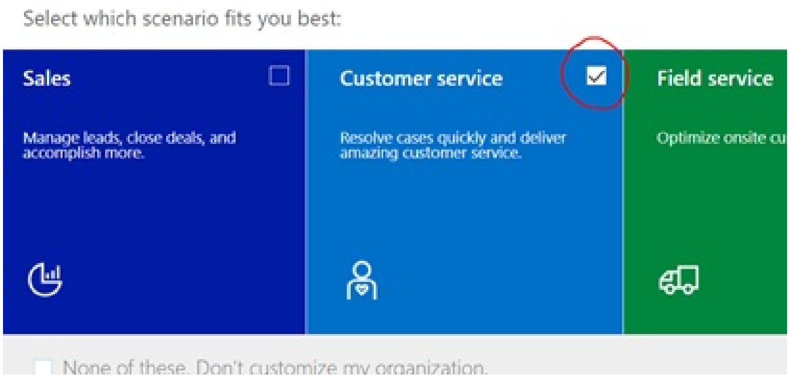
How to create a Dynamics 365 Trial account

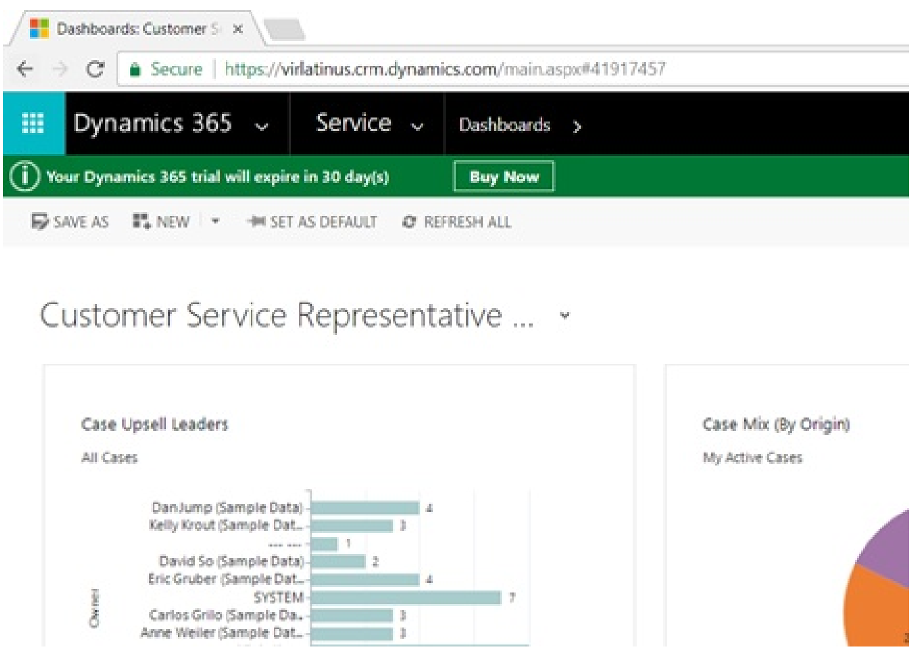
1. Go to the Dynamics 365 Trial website


Welcome, let's get to know you
United States
This can't be changed after sign-up. Why not?
Vir
Latinus
virlatinus@gmail.com
(305) 594-[redacted]
VirLatinus
English
1 person
Next


Create your user ID
You need a user ID and password to sign in to your account.
virlatinus
@
virlatinus
.onmicrosoft.com
virlatinus@virlatinus.onmicrosoft.com
By clicking Create my account you agree to our terms and conditions.
Create my account

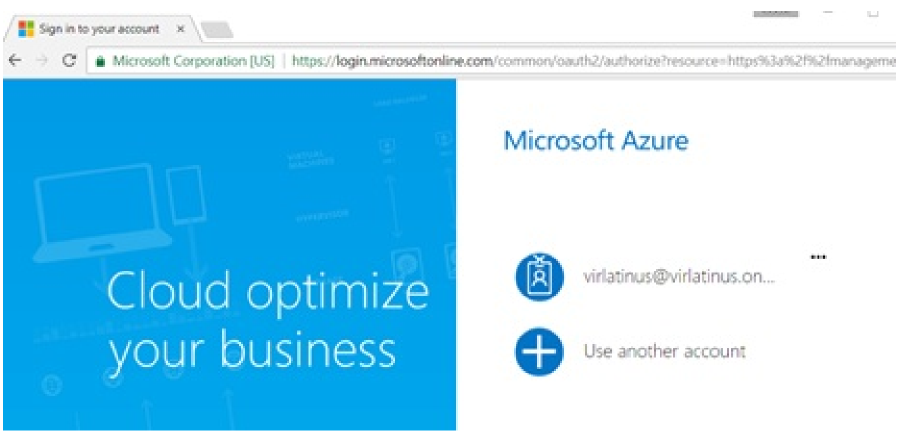




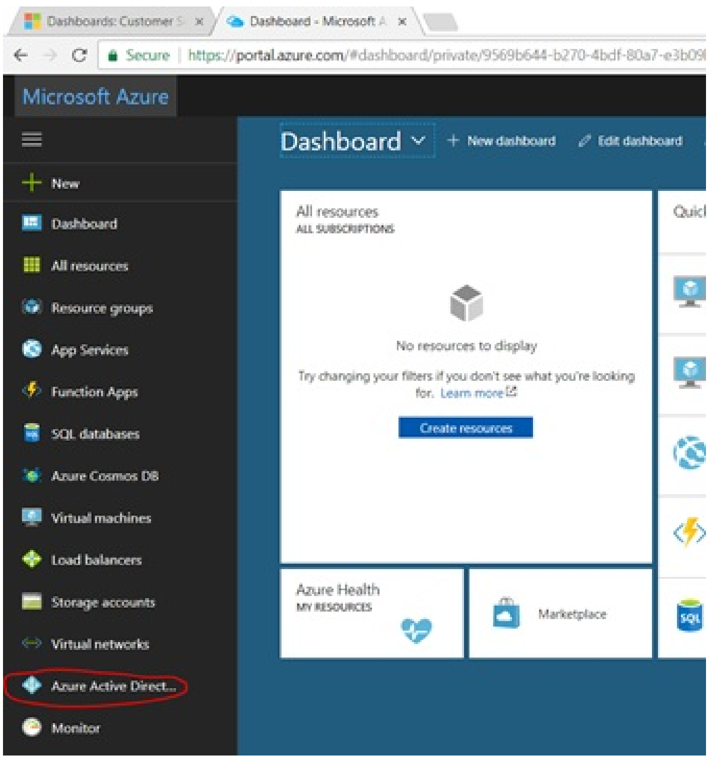


Set Up Azure

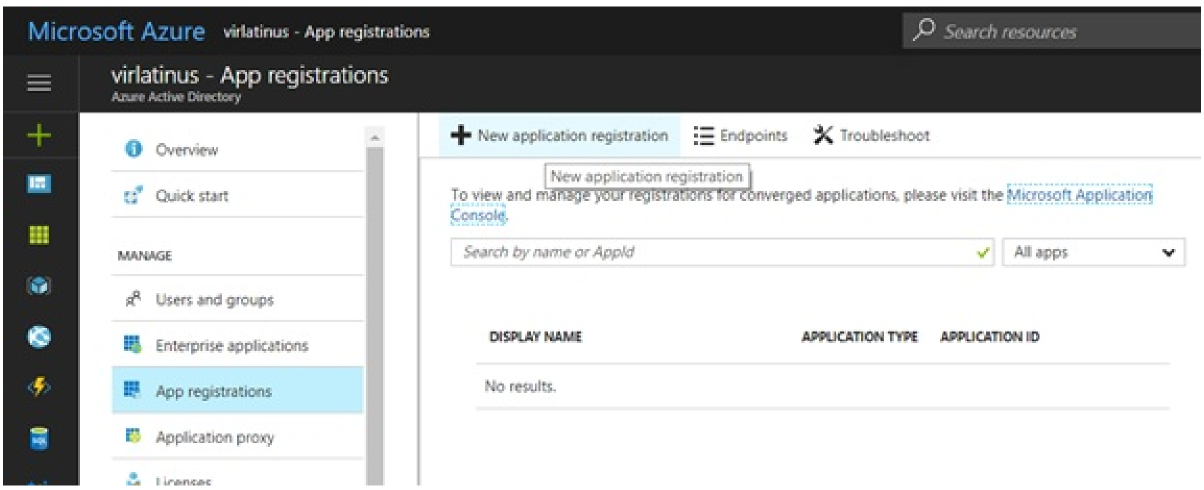
1. Go to the Azure Portal
2. Log in with your onmicrosoft.com account



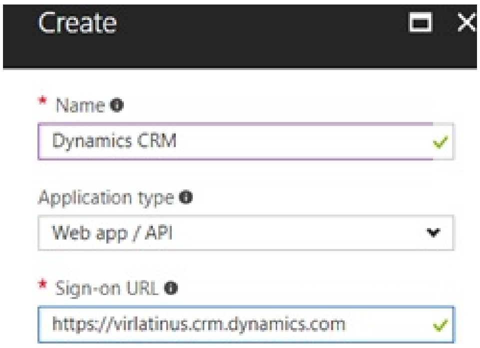
3. Go to Azure Active Directory



4. Add a new Application Registration

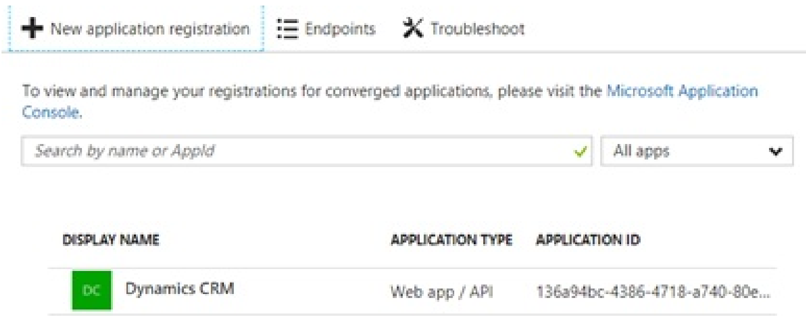


5. Fill in the CRM Application information

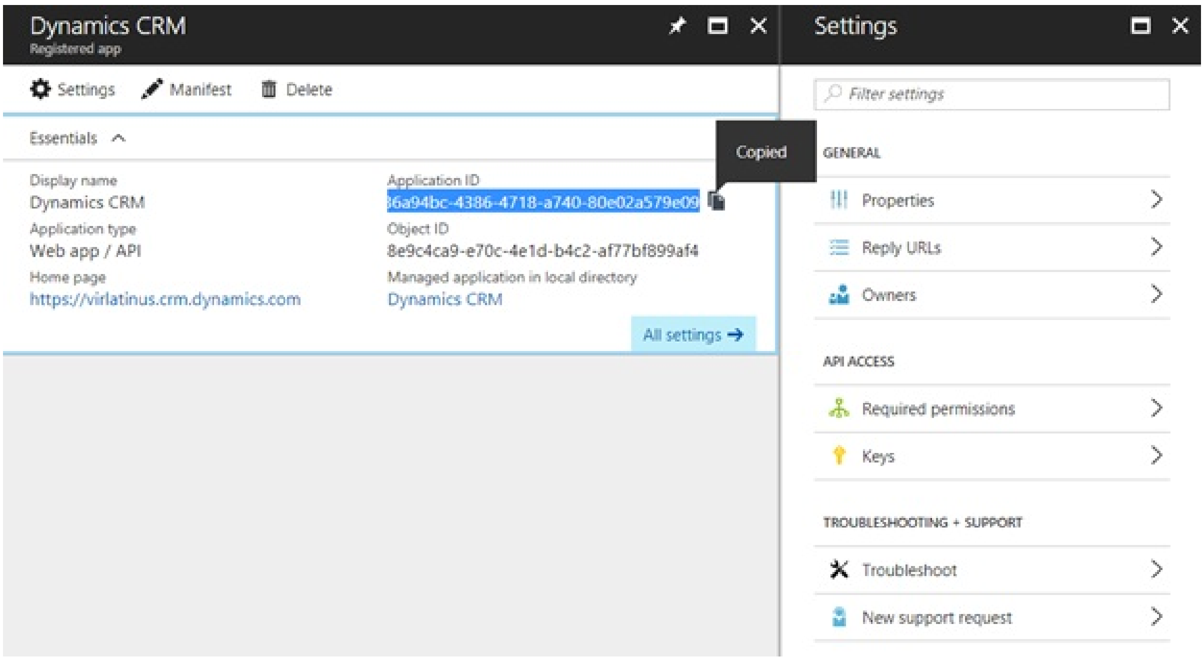


6. Click on Create

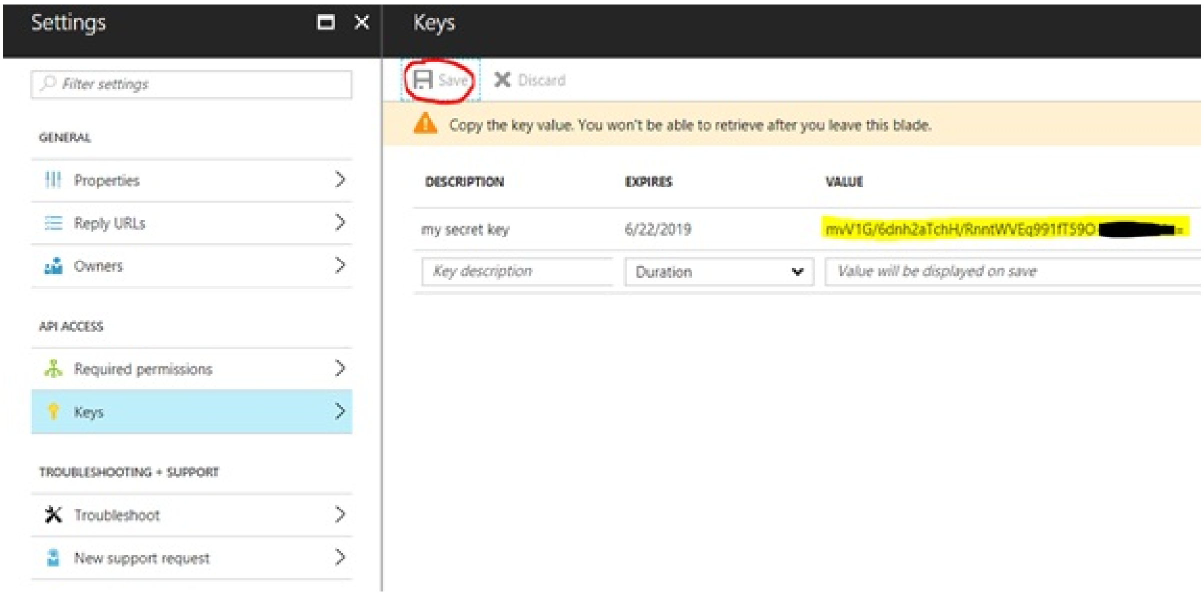
7. Click on the Application you just created

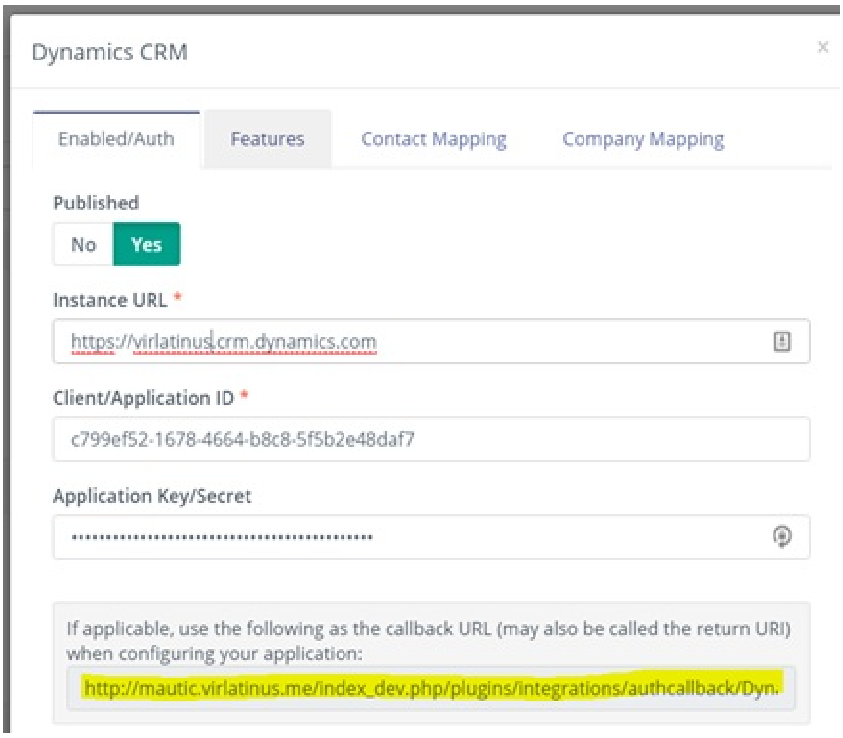


8. You will use the Application ID when configuring the plugin in Mautic

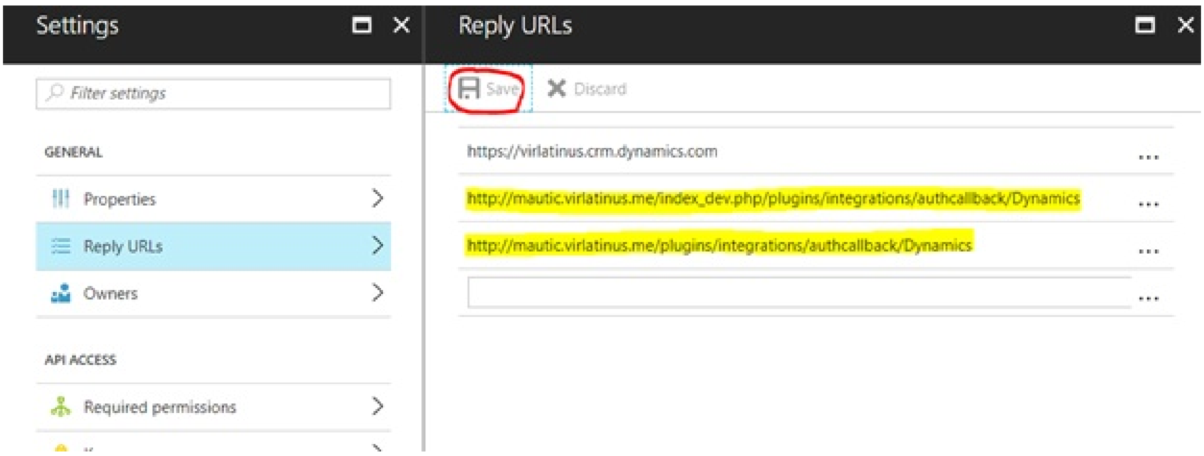


9. Add a new Key. Use any name, click on save and copy the value. You will use it as the plugin secret in Mautic.

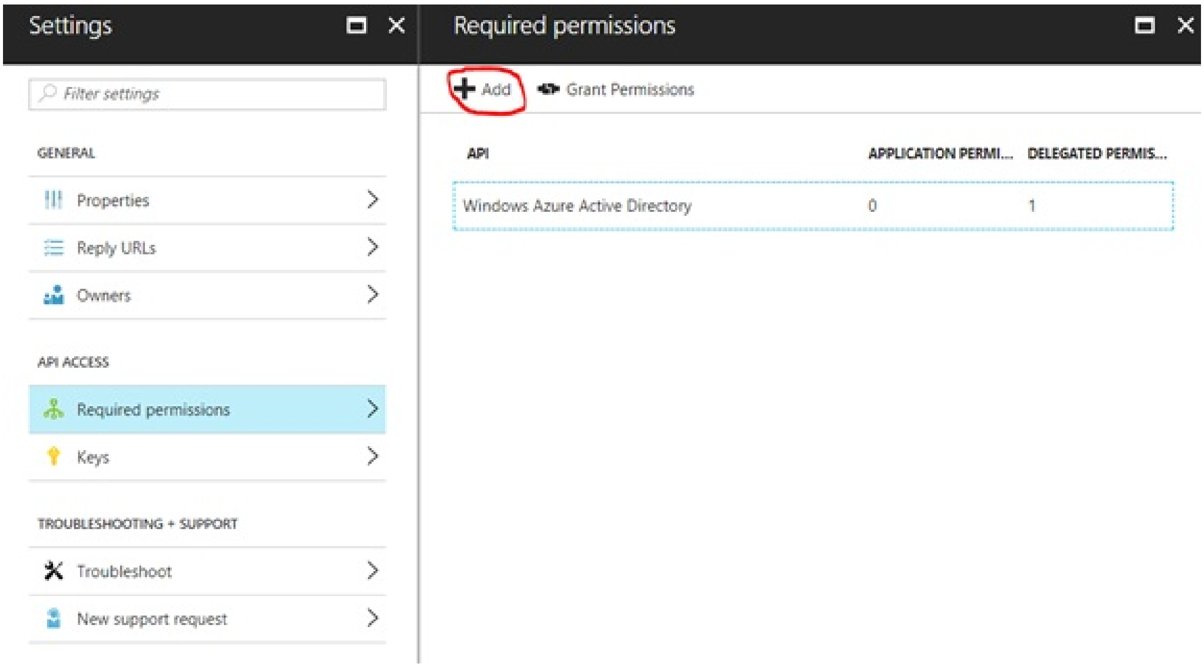




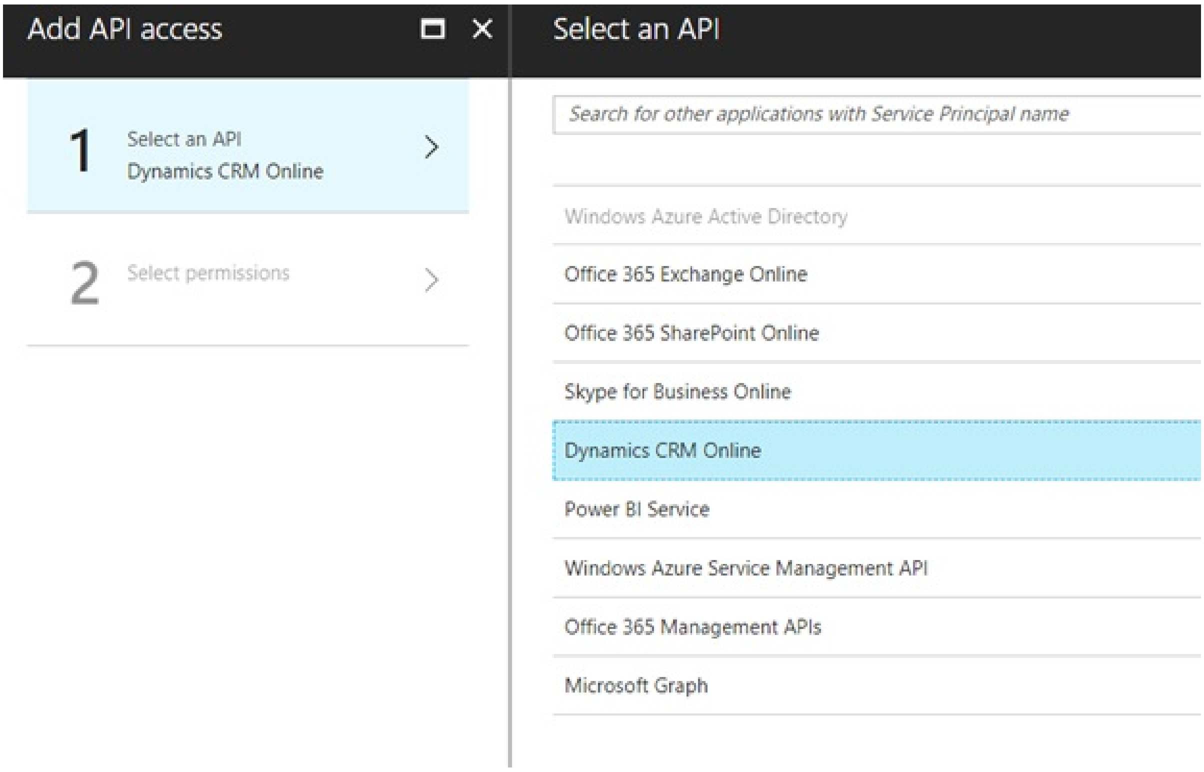
10. Configure the reply URLs using the callbacks from the plugin settings in Mautic. Click Save



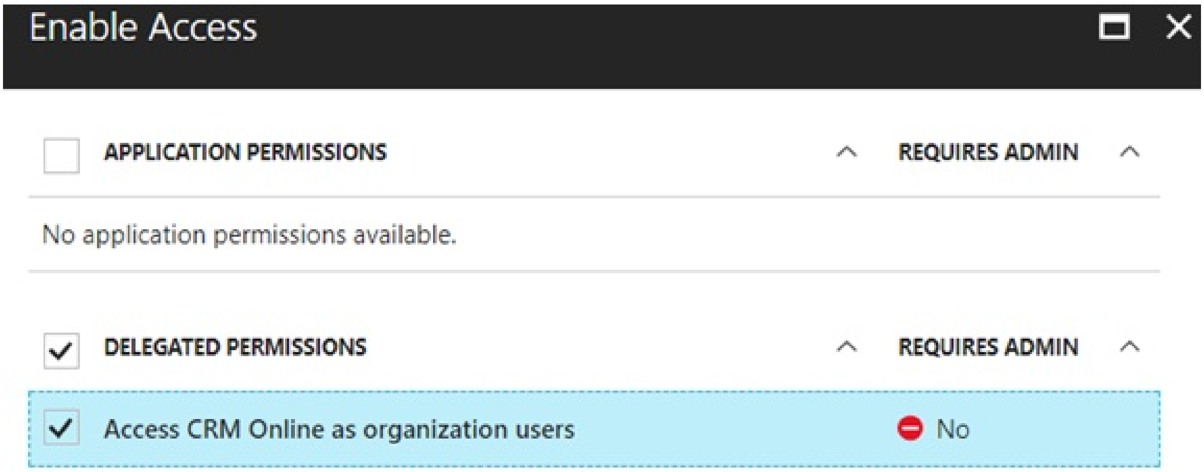
11. Configure the Required Permissions. Click on Add



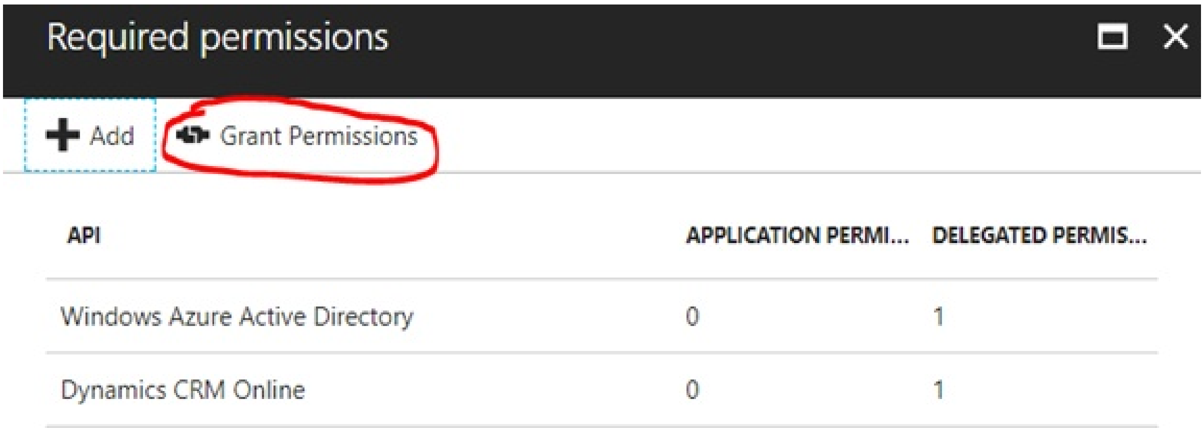
12. Add Dynamics CRM Online Api Access. Click Select



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

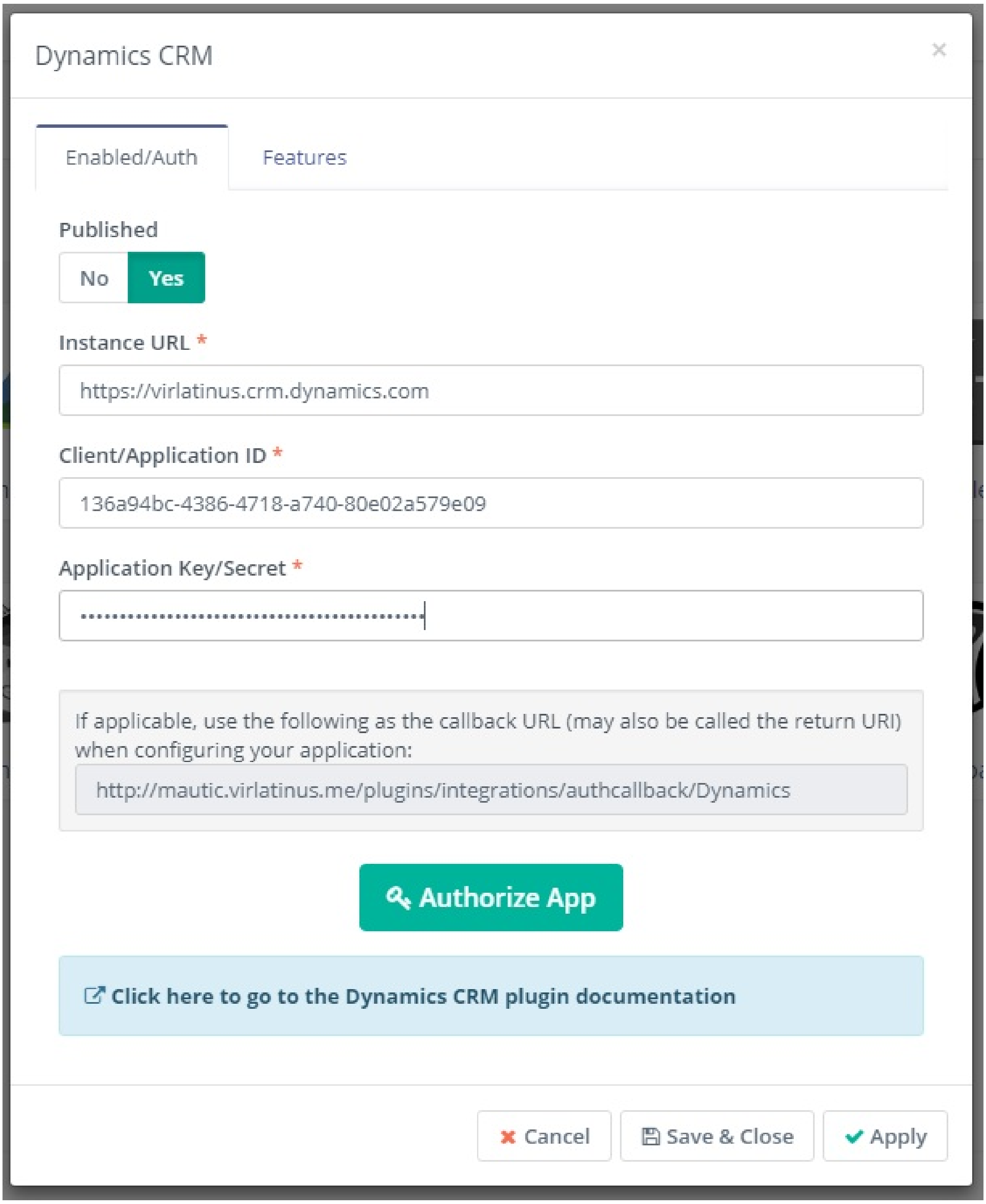


14. Activate the permissions by clicking "Grant Permissions". Click Yes

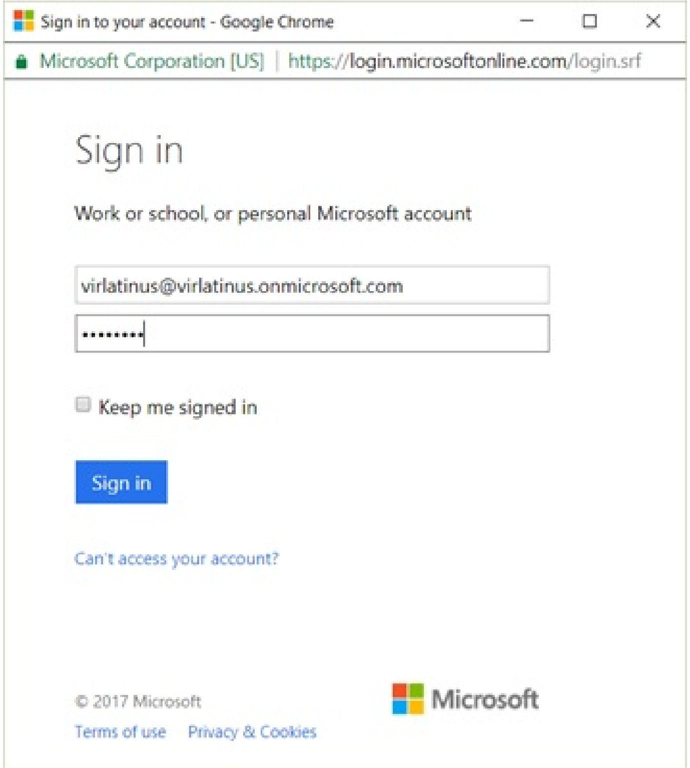


15. Go back to Mautic

16. Authorize the plugin



17. Use your onmicrosoft.com account to authenticate:



Test the plugin

Follow these steps to test the integration.

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 - Outlook plugin

This plugin allows for the Outlook Add-In to keep track of emails sent to leads.

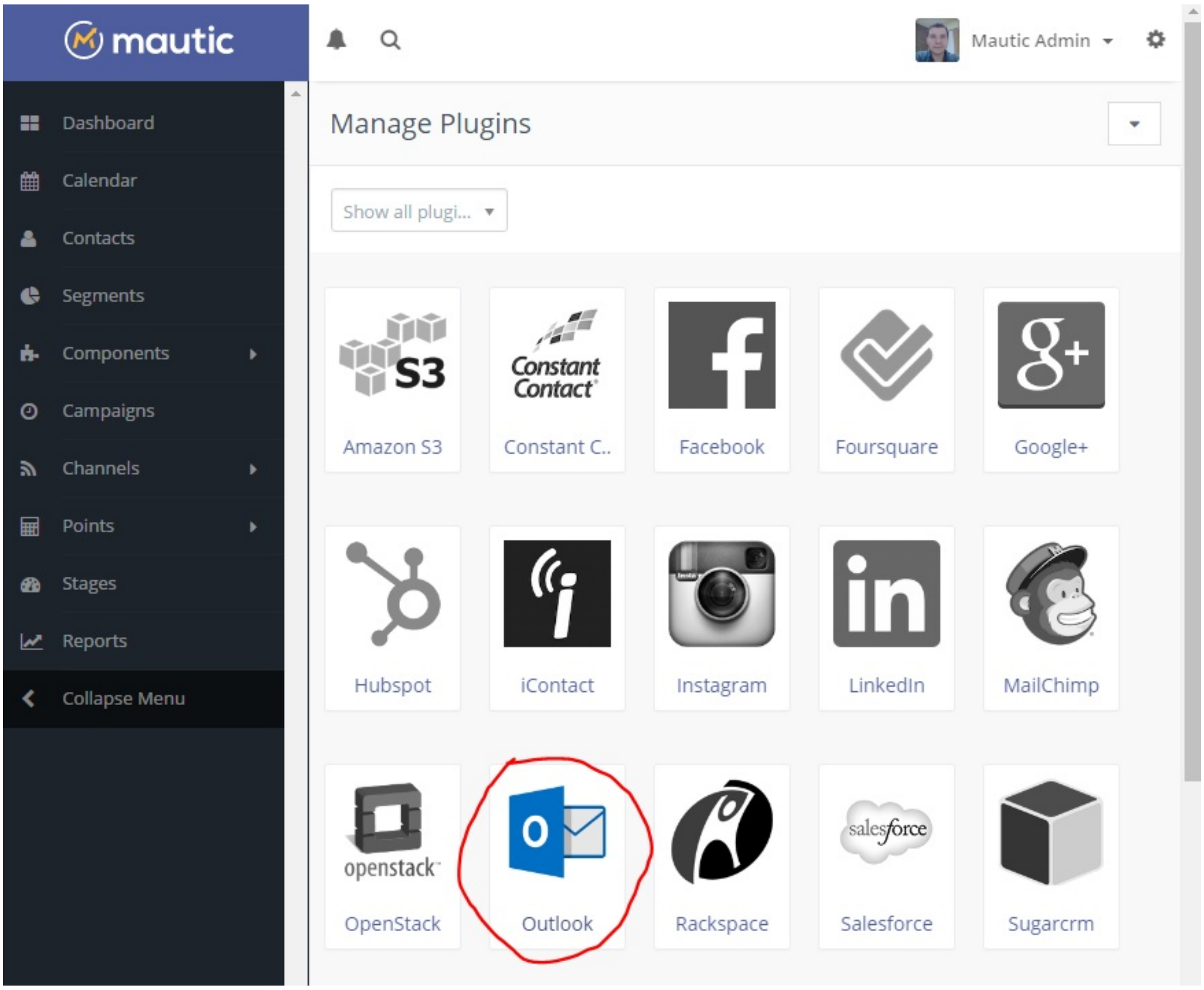
Requirements

- Mautic installed on a publicly accessible URL.
- Microsoft Outlook 2013 or 2016.
- Mautic Outlook Add-In for Outlook 2013/2016
- Emails should be sent in HTML format.

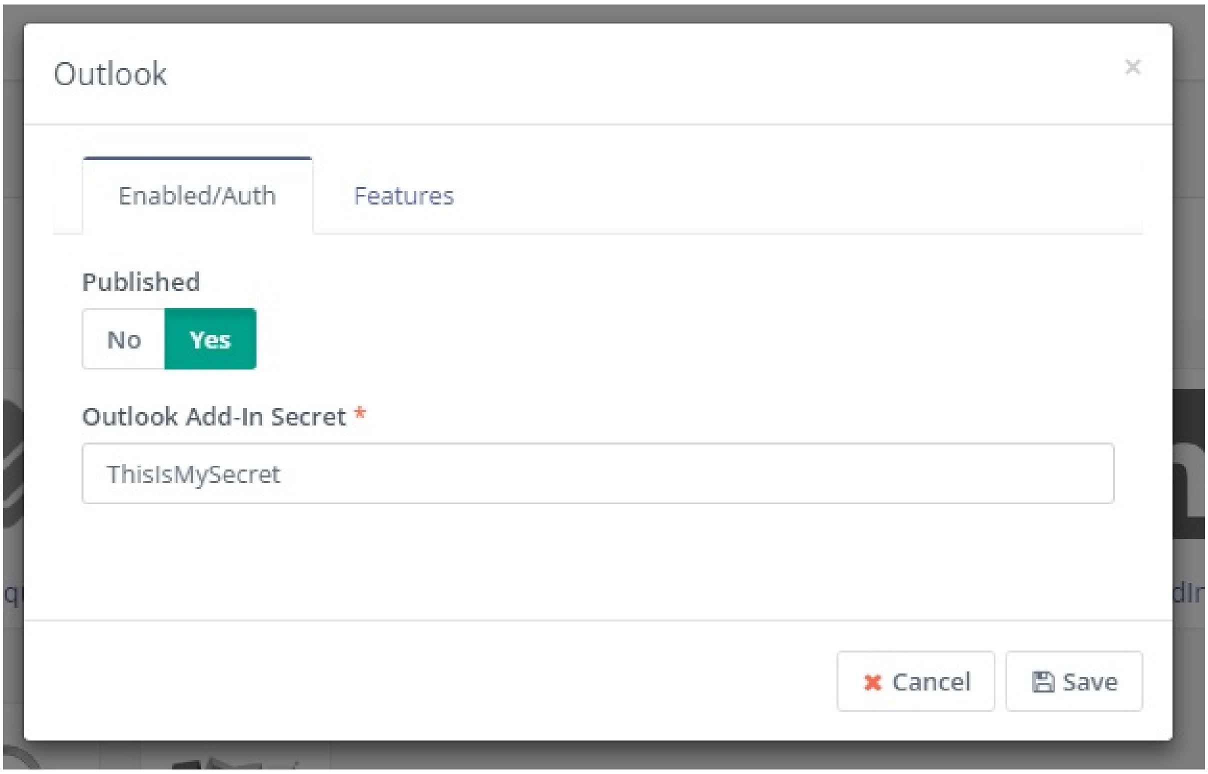
Configure the plugin

Even if the plugin is compatible to Outlook 2013, this will describe the installation of the most recent compatible version, 2016.

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

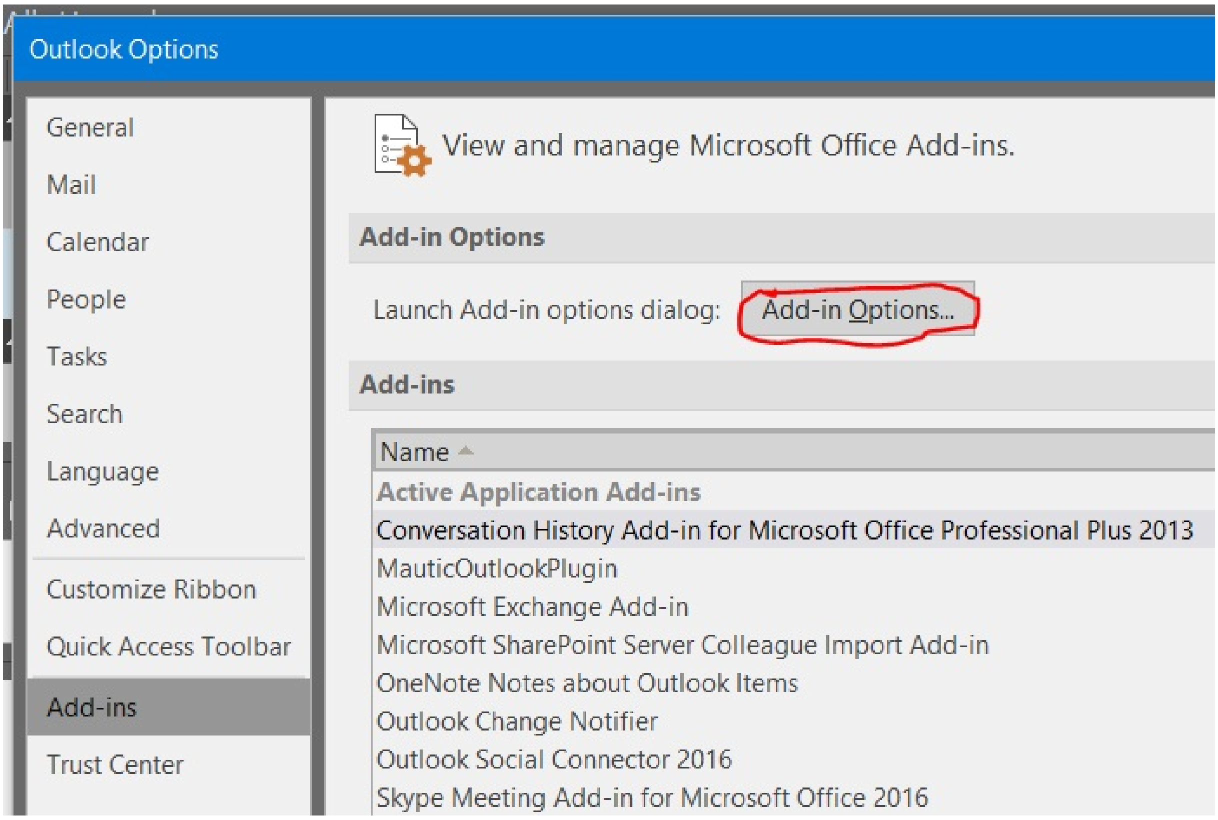


2. Click on the Outlook plugin button and enter a secret or key to validate the Outlook Add-In

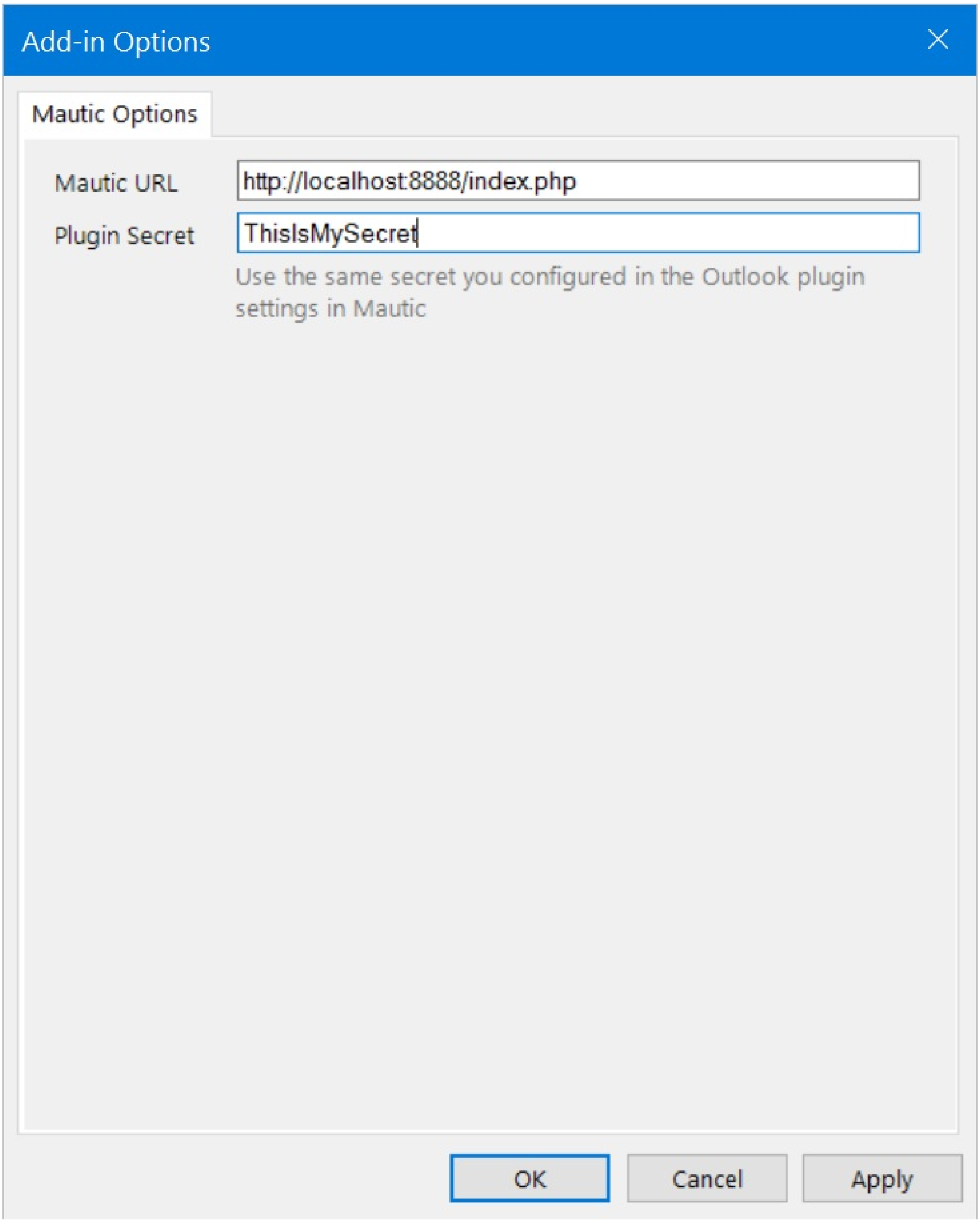


3. Run the Mautic Outlook Add-In Installer on a Windows machine with Outlook 2016

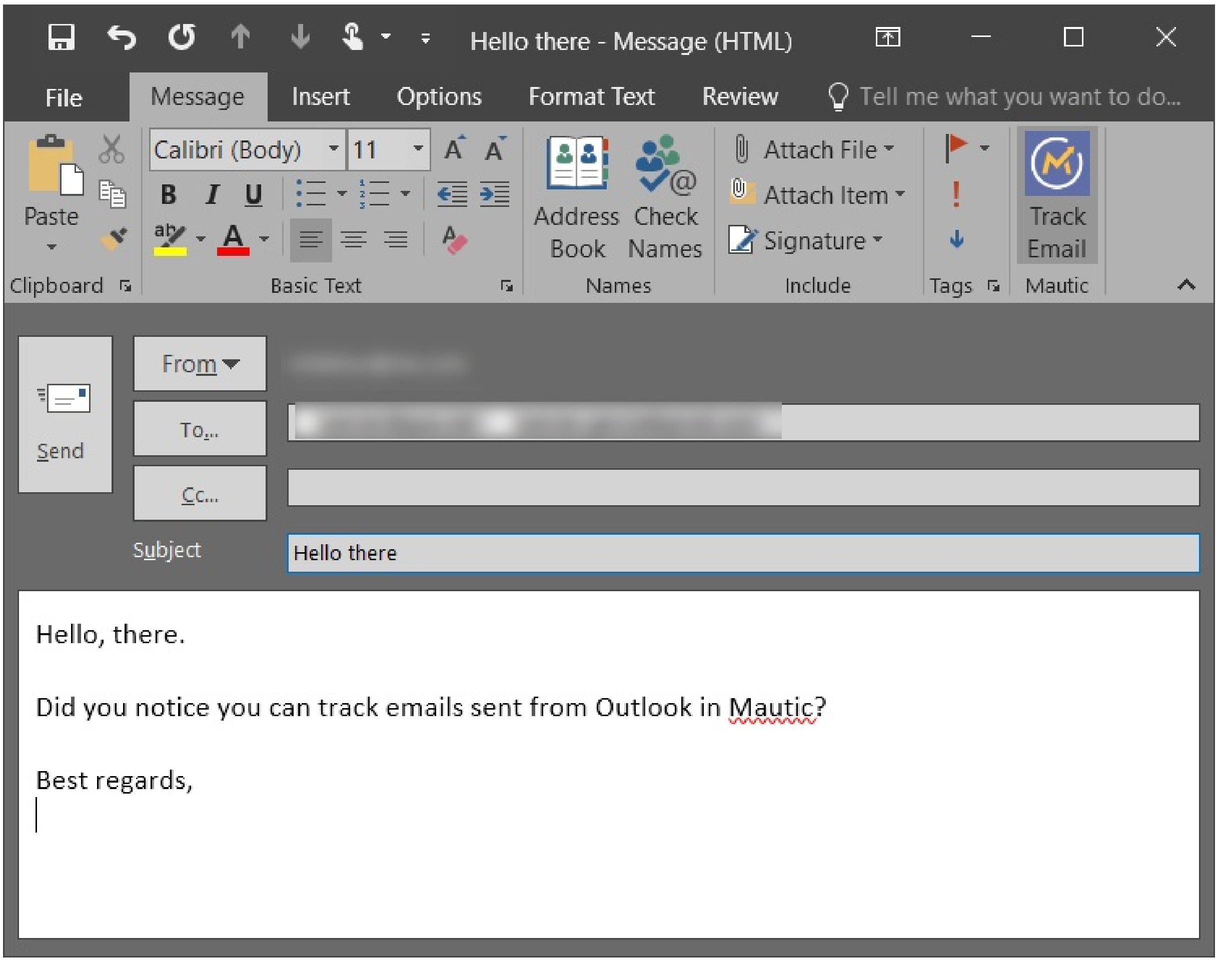
4. On the Outlook 2016 Options window, select Add-Ins and click on the Add-In Options button



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

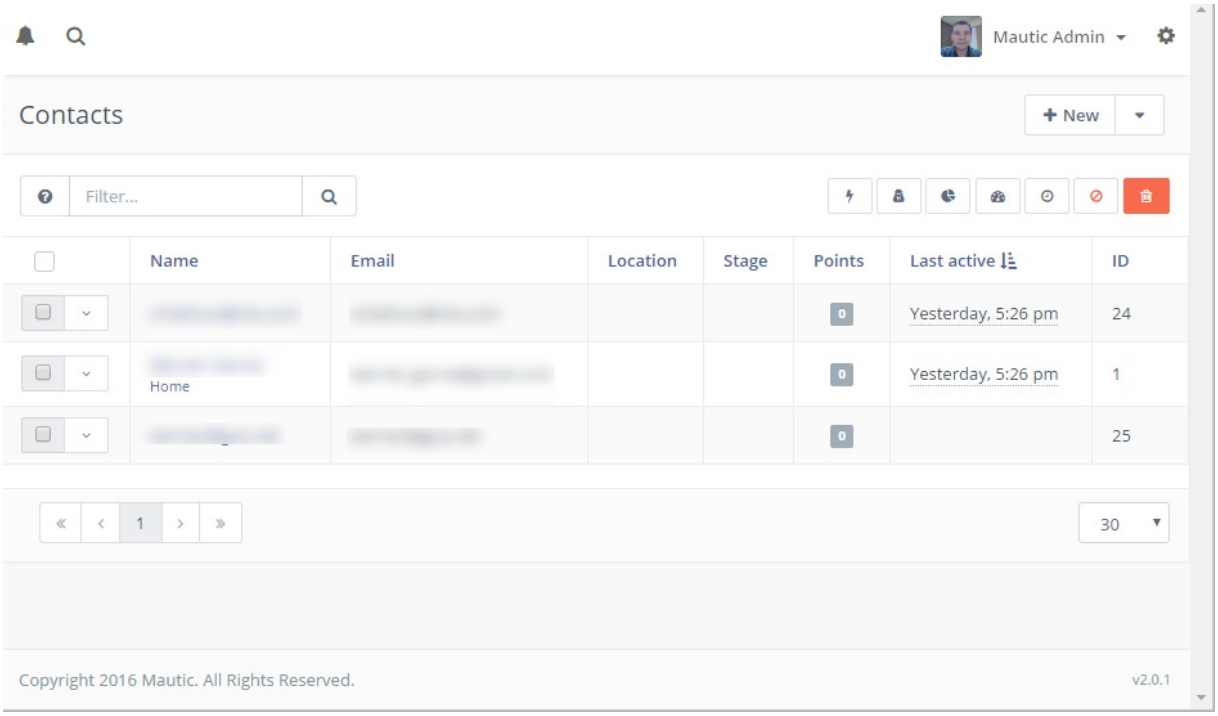


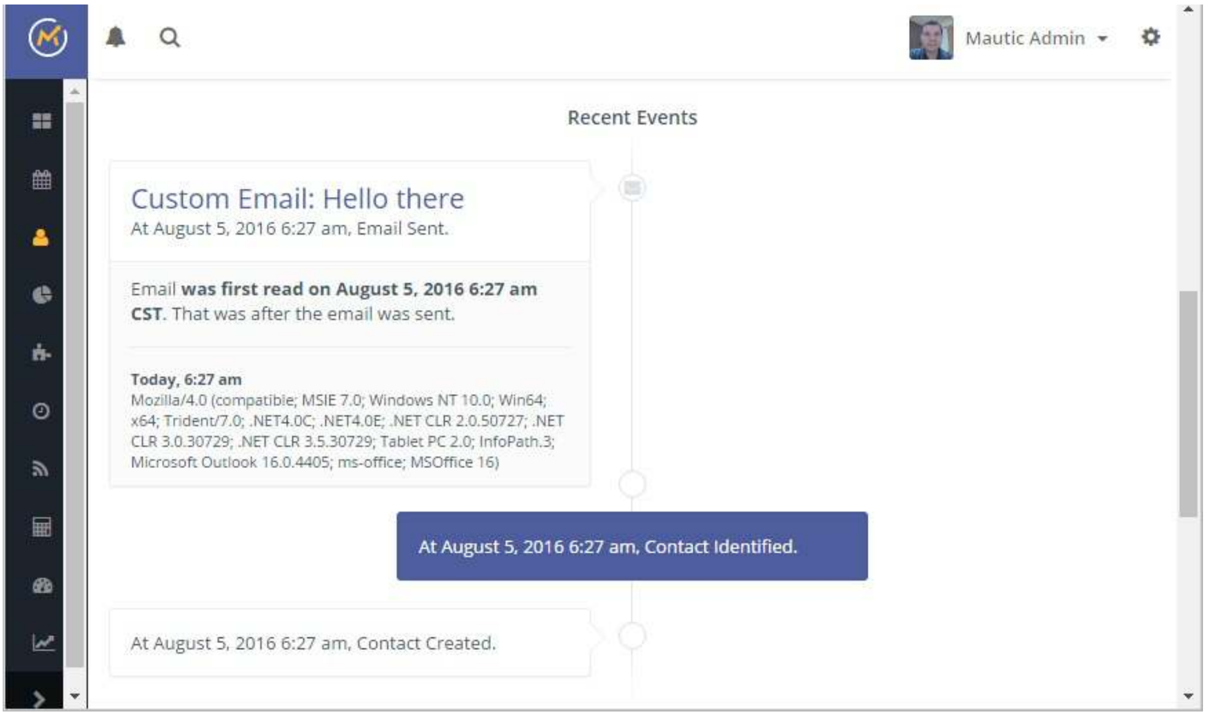
7. This will append a tracking GIF to the email with the following syntax:

```
https://example.com/index.php/outlook/tracking.gif?
d=H4sIAAAAAAAEAIVRTW%2FCMAz9LRyCtgNVlFBpHHroWsRuk8ak7RpaUzqaGCUp0H8%2Fpy0TH4dJUZy892w921uLOvkCa8BGK2WLWi2dt6pUbM7PYPEcFainoFXd
JKdBVvUy4quA9rxrNz9Q%2BCQ16HdgmeAenKewpfIU3lvfIO6nGyy75HNXO8LQAN3984R2X5tqMpkwnjOejrfg19%2FBJIHBJsskS3M1MOvOedChUA5HaPBAsp54a7
UyBH%2BAw9YWECRrsMc6PHvFd2iR0NfW1QbcjUDwMjhctYqqq0YxkQU6SqMhNxi85GeoD8p0134zaBom%2By4ezlPMxTPFeCH5TLzI%2BdgizeEu5aIUQixmIubjSG
5WAY8bC8kyC%2FvxSBX%2Flcvl3bT%2Fvr8k1oBgIQIAAA%3D%3D&sig=cf078d5b
```

> **Important**
>
> Appending a tracking pixel via the Outlook plugin means that there is a possibility for false positives on email opens. This edge case occurs if the user's Outlook has the Preview Pane enabled for Sent Messages.

1. 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





Sending emails in HTML format from Outlook

This is mandatory to append the tracking pixel.

There are 3 places to manage that:

1. In each new email window
2. In Settings > Mail > Compose messages
3. In Settings > Mail > Message format

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
```

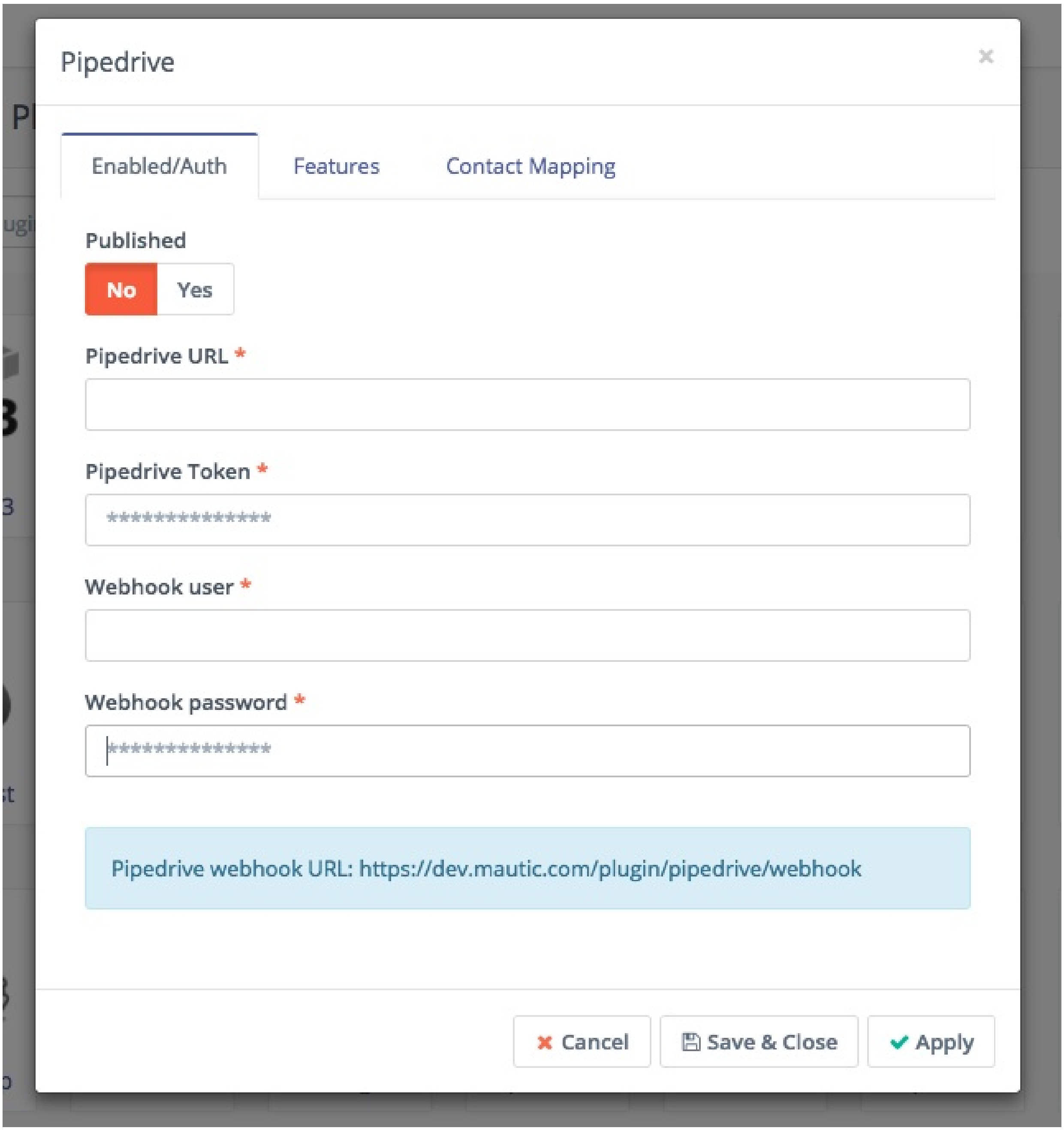
Mautic - Pipedrive CRM plugin

This plugin allows for synchronization between Mautic and Pipedrive.

Create a Pipedrive account if you don't have one already.

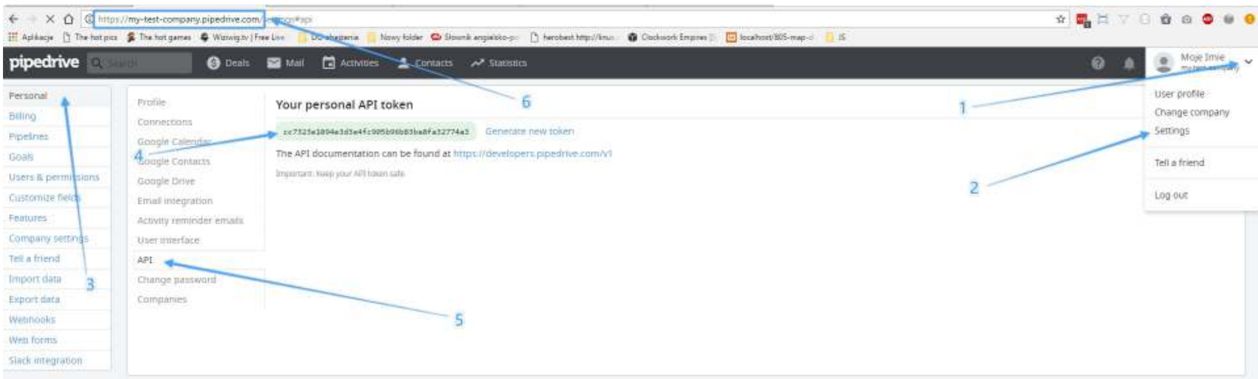
Configure the plugin in Mautic

To integrate Mautic with Pipedrive, fill out the following fields:



1. Pipedrive URL: Pipedrive API URL
2. Pipedrive Token: Pipedrive API token
3. Webhook user: the username of your choice (used in Pipedrive webhooks)
4. Webhook password: the password of your choice (used in Pipedrive webhooks)

Get the Pipedrive URL and API Token from Pipedrive. The API URL looks just like your own Pipedrive URL, but you have to add */v1* at the very end. In this example the URL will look like this: `https://my-test-company.pipedrive.com/v1` .



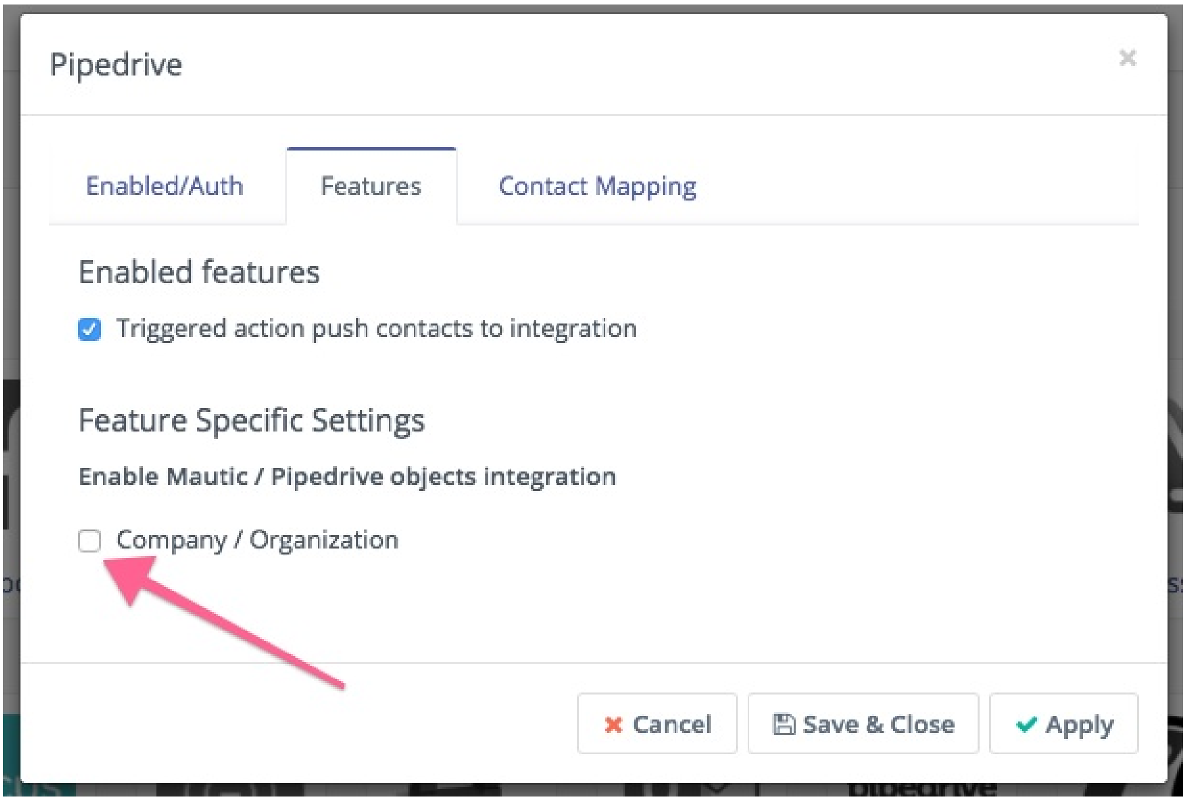
When you are filling out the form for the first time, set Published field to No. When you save the form and open the configurator again, you will be able to map the fields pulled from the Pipedrive API with Mautic fields. Having mapped the fields correctly, activate the integration by setting Published to Yes to start the synchronization.

Be extra careful when matching the fields to make sure that the correct data is saved.

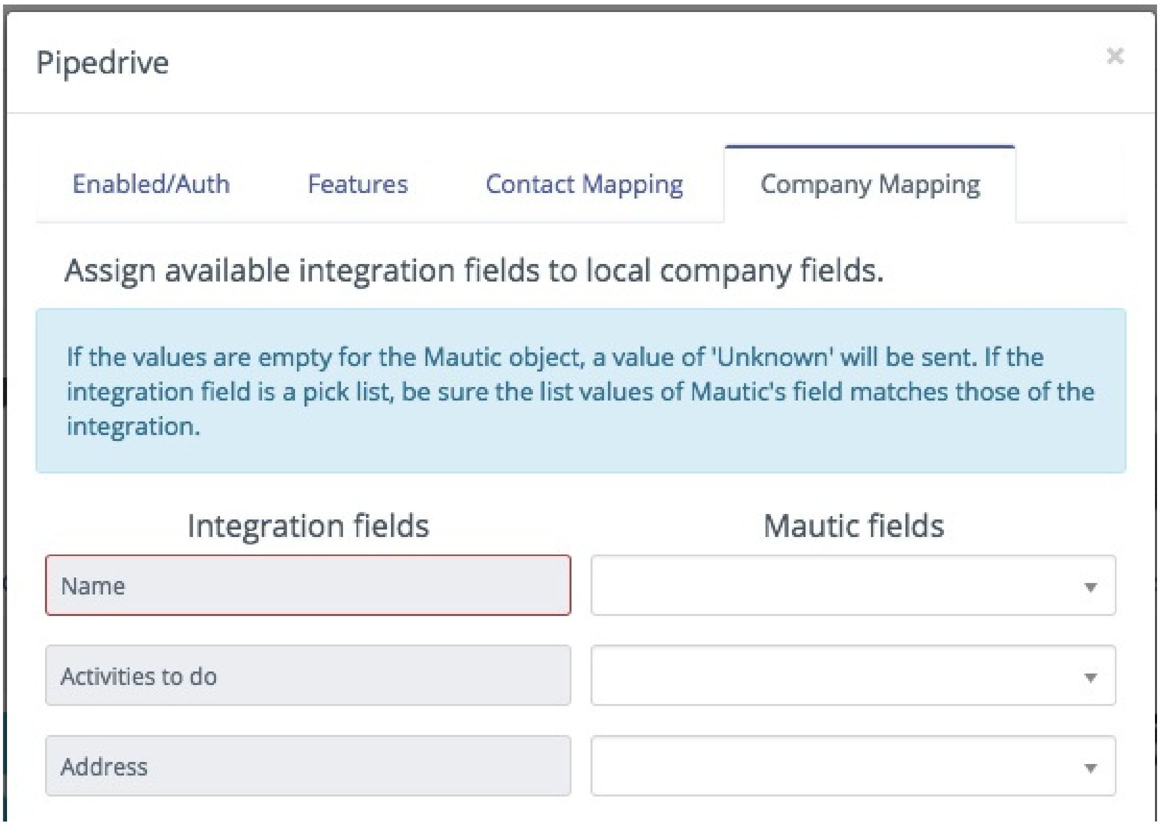
Features

Company / Organization Synchronization

To enable Company/Organization Synchronization, go to Features tab and tick *Company / Organization*:



After closing and re-opening the window you will be able to map the company/organization fields – they will be pulled from Pipedrive automatically.

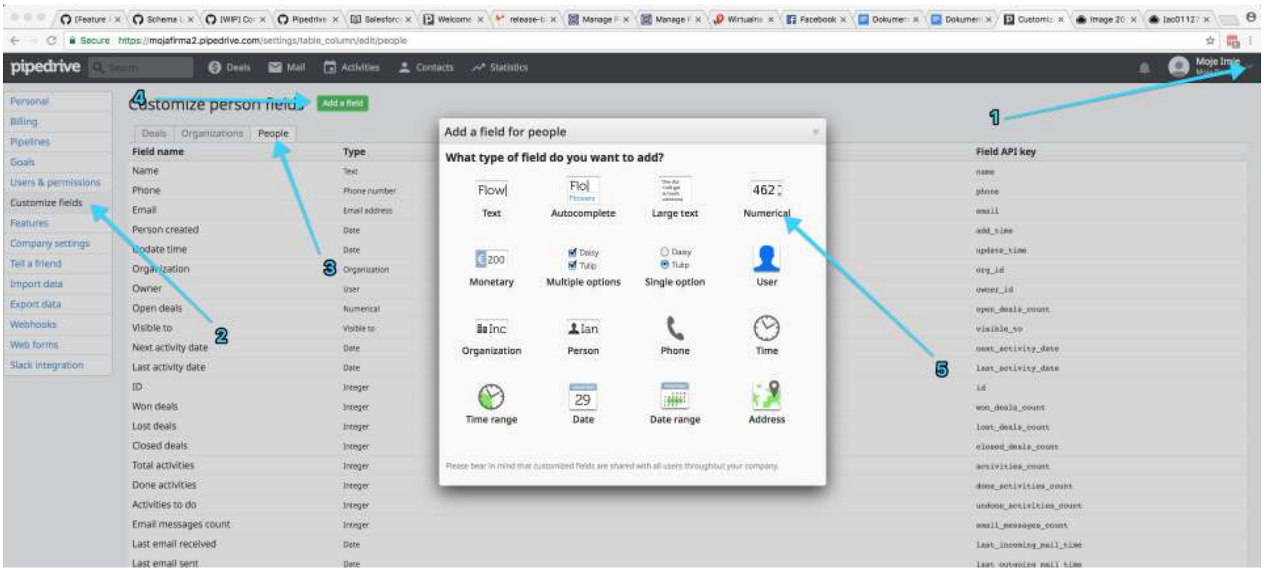


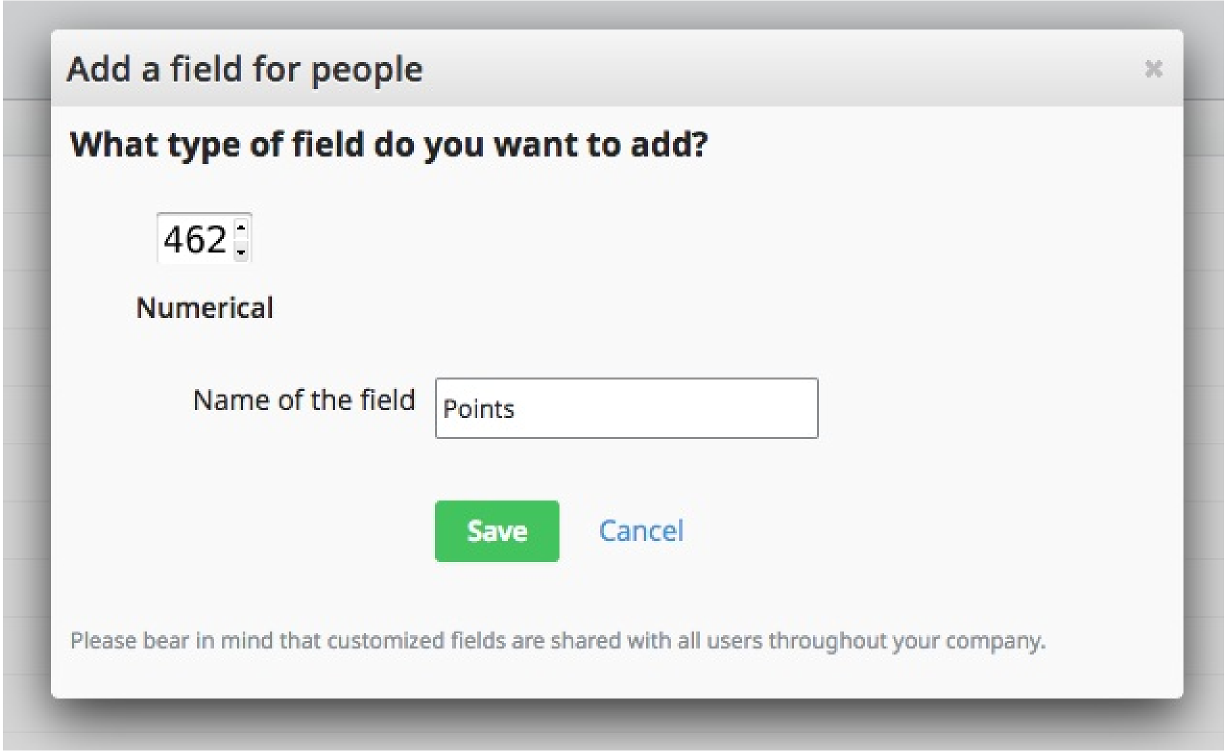
Owners Synchronization

The plugin can also assign Owners to Lead/Person and Company/Organization. If you have a user with the same e-mail address both in Pipedrive and in Mautic, the plugin will synchronize the Owner automatically.

Points Field Synchronization

The plugin can synchronize Points field as well. To use this feature, add such field to Person in Pipedrive (Pipedrive doesn't support this field by default):

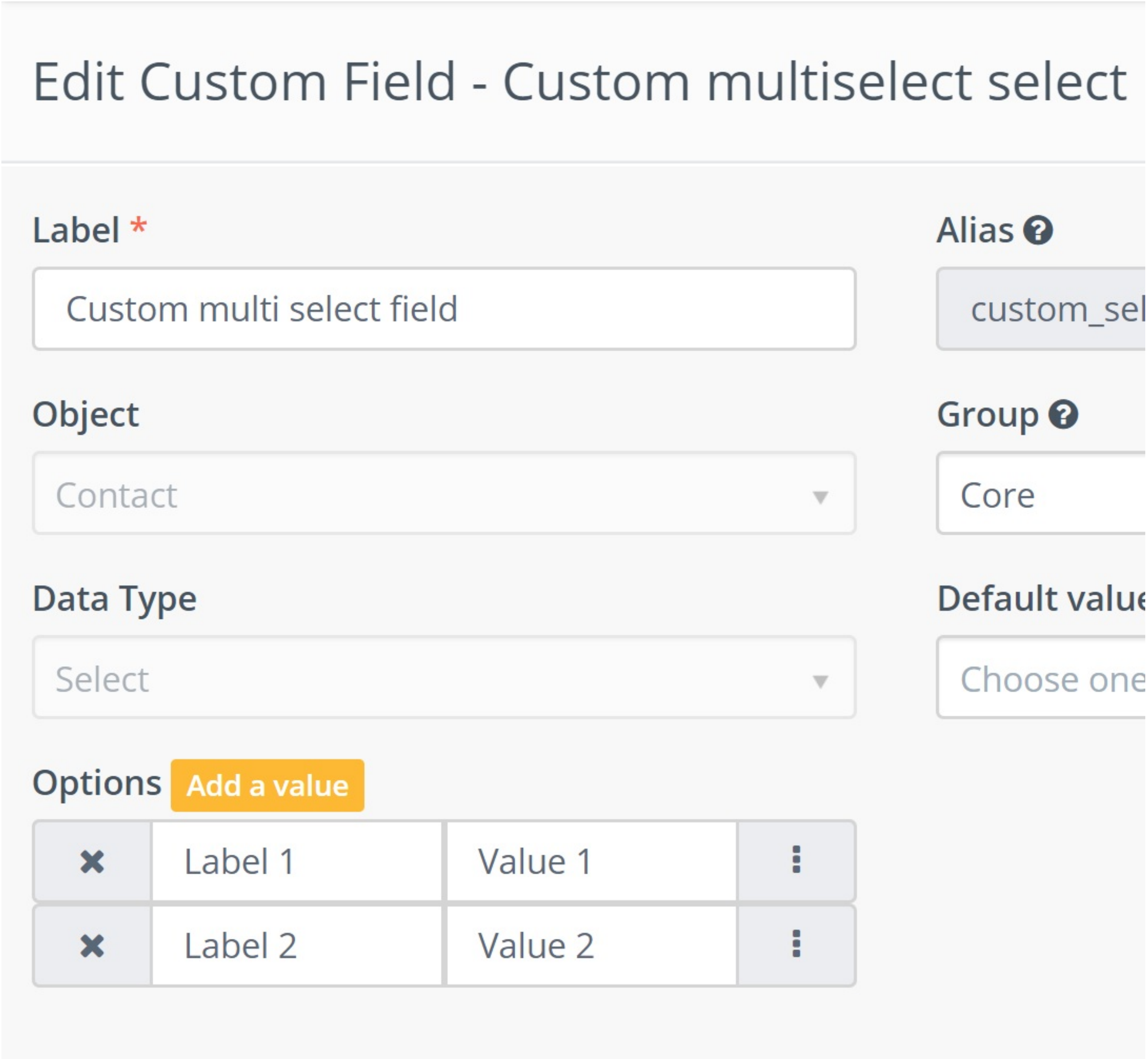


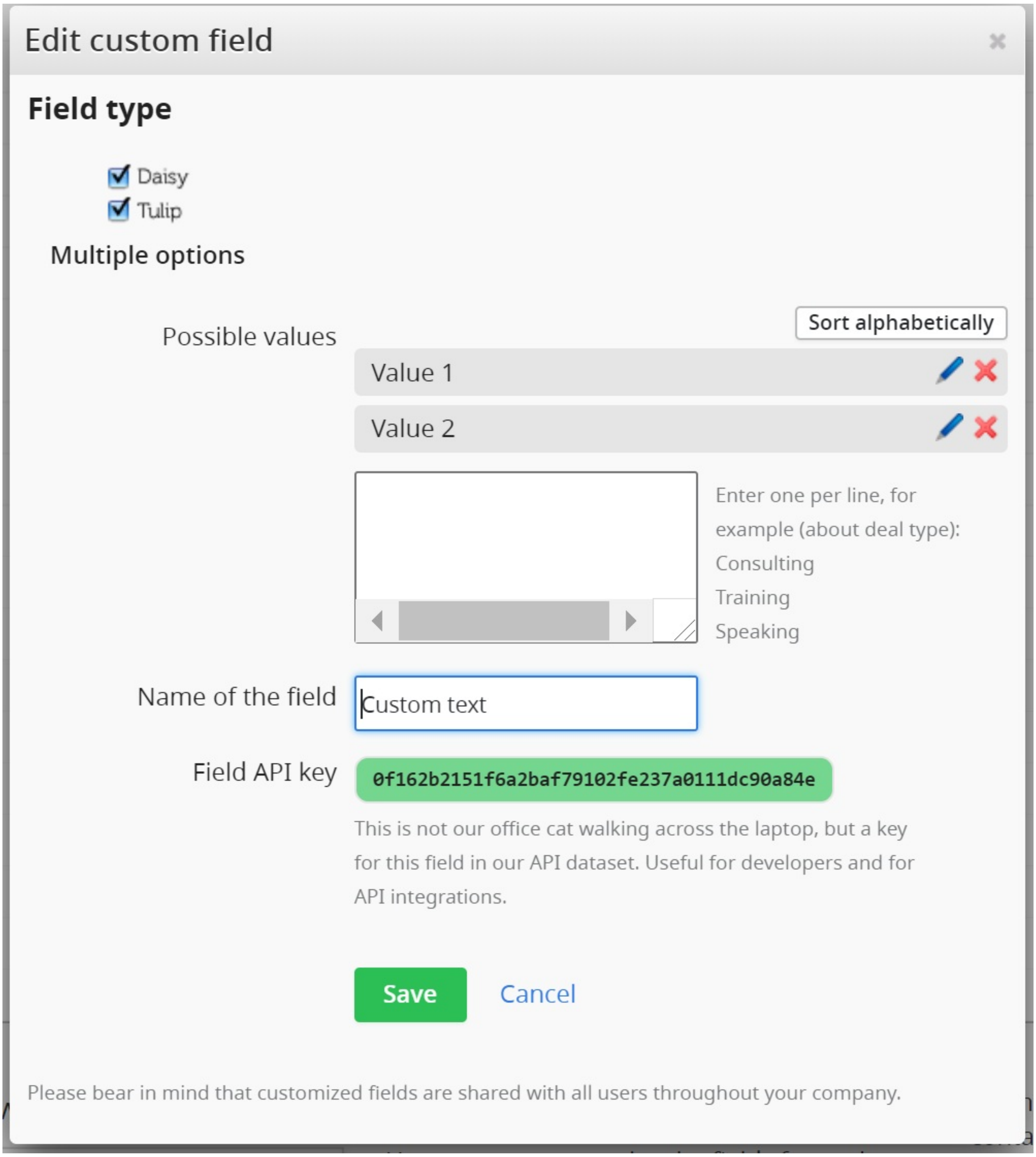


Having done that, open the plugin configuration screen in Mautic again to see a new mapping option:

Multiselect custom field

Multiselect custom field required values in Mautic setup equal to Pipedrive labels.

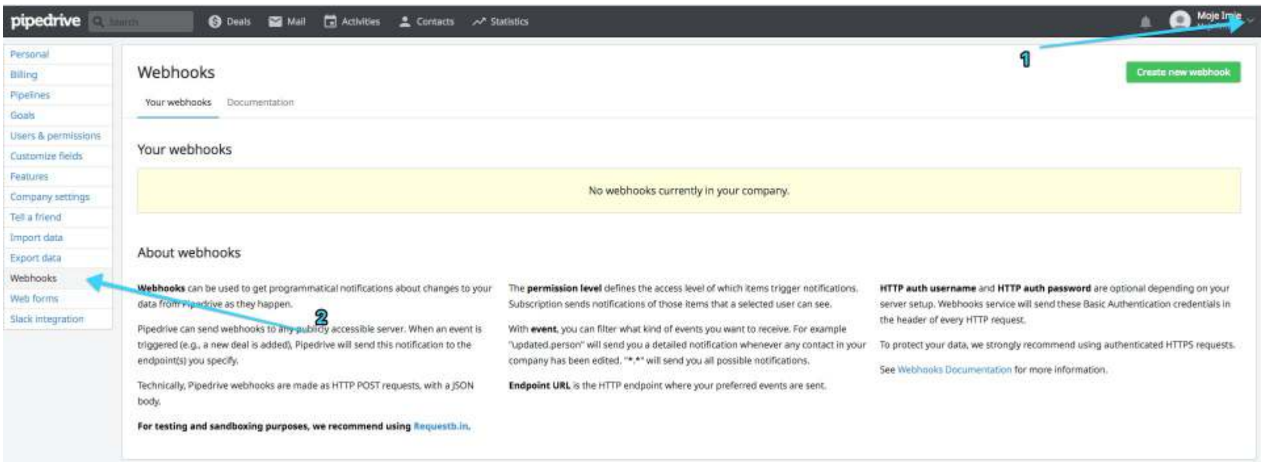

Edit Custom Field - Custom multiselect select
Label *
Custom multi select field
Alias
custom_sel
Object
Contact
Group
Core
Data Type
Select
Default value
Choose one
Options
Add a value
Label 1
Value 1
Label 2
Value 2

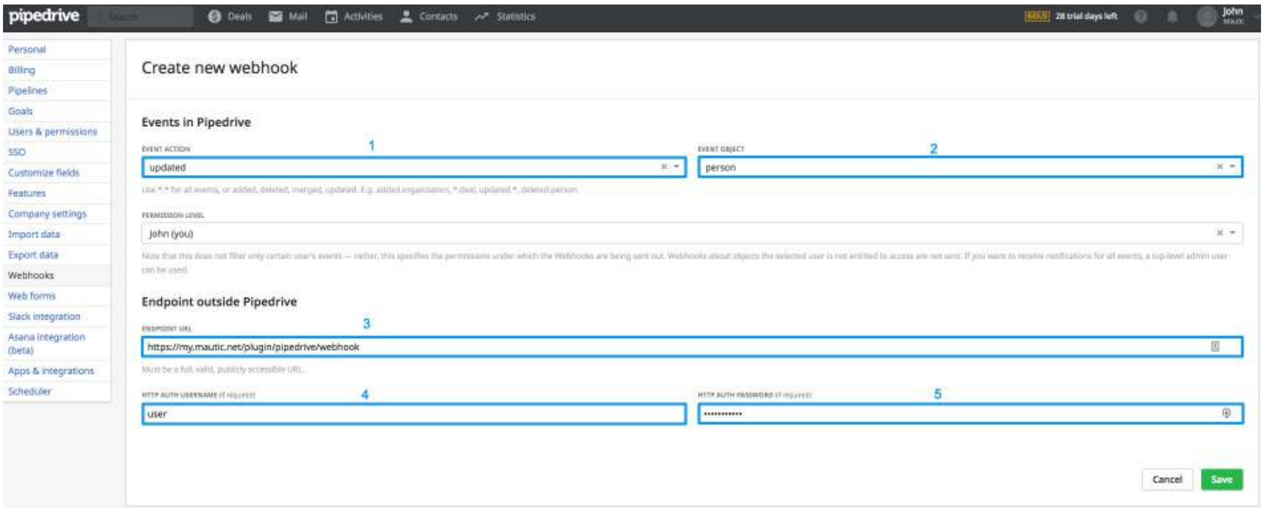


Configure the plugin in Pipedrive

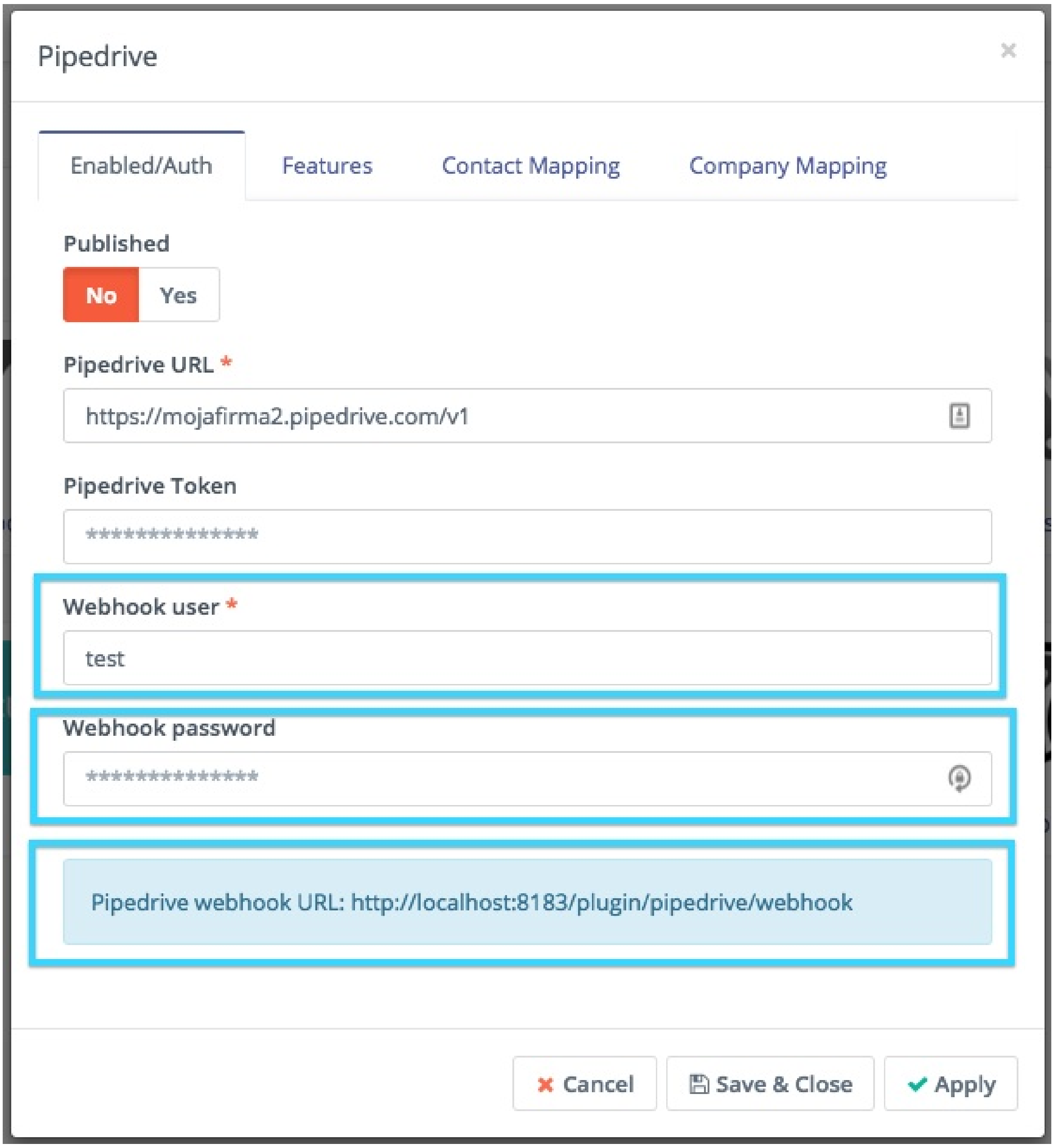
To exchange the data between Pipedrive and Mautic, configure the webhooks in Pipedrive so that Mautic records are updated automatically.

You have to create webhooks for Person, User and optionally for Organization.

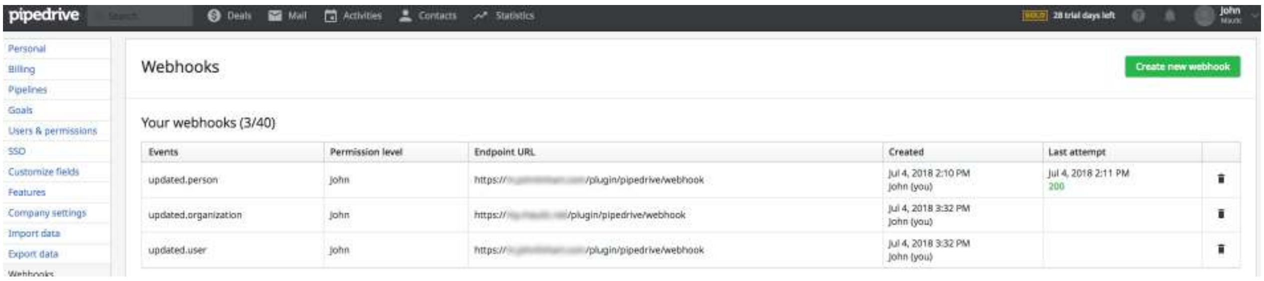




1. Select `updated` to send to Mautic updated events for the given object. Do not select `*` as Pipedrive will send the `updated` events on create event too. If you select `*` the contacts/companies/users will be duplicated.
2. Choose which object you want to synchronize (Person, Organization, User)
3. Enter your Mautic URL address (you can find it on the Pipedrive plugin configuration page)
4. Enter the webhook user that you used for plugin configuration
5. Enter the webhook password that you used for plugin configuration



Repeat for Person, User and Organizations. When you're done, the webhook view should look like in the screenshot below. Keep in mind that Company/Organization synchronization is optional, so you don't have to add a webhook for it if you don't want to use it.



Command line scripts

The scripts try merge older contacts, but we recommend it just for the initial Mautic <-> Pipedrive data exchange. You shouldn't use them to make updates with CRON.

- `mautic:integration:pipedrive:fetch` – pulls the data from Pipedrive and sends it to Mautic
- `mautic:integration:pipedrive:push` – pushes the data from Mautic to Pipedrive

Realtime update

If you create or edit contact in Pipedrive, Pipedrive should send update via webhook and Mautic should recognize the contact's status and add or update it dedending on last date of integration. If you don't want to use this way of contact's synchronization, just don't setup webhook in Pipedrive.

If you create or edit contact in Mautic, Mautic should send this update to Pipedrive via API. Mautic should recognize the status of the contact and add or update it depending on last date of integration. By default is disabled this feature. You are able to enable it by option **Import contacts to Pipedrive immediately on change in Mautic** in plugin settings.

Mautic - Salesforce CRM plugin

Mautic can push a contact to Salesforce CRM based on Contact actions or Point Triggers.

> **Note**
>
> In this document, there may be references to outdated terminology such as
>
> - *leads*,
> - *lists* or *lead lists*, and
> - *anonymous leads*
>
> In Mautic version `1.4`,
>
> - *leads* were renamed to ***contacts***
> - *lead lists* were renamed to ***segments***
> - *anonymous leads* were renamed to ***visitors***

Requirements

1. Create a Salesforce CRM account if you don't have one already.
2. Your Mautic instance has to run on `https://`.

   Salesforce will not allow you to create an App with a `http://` callback URL.

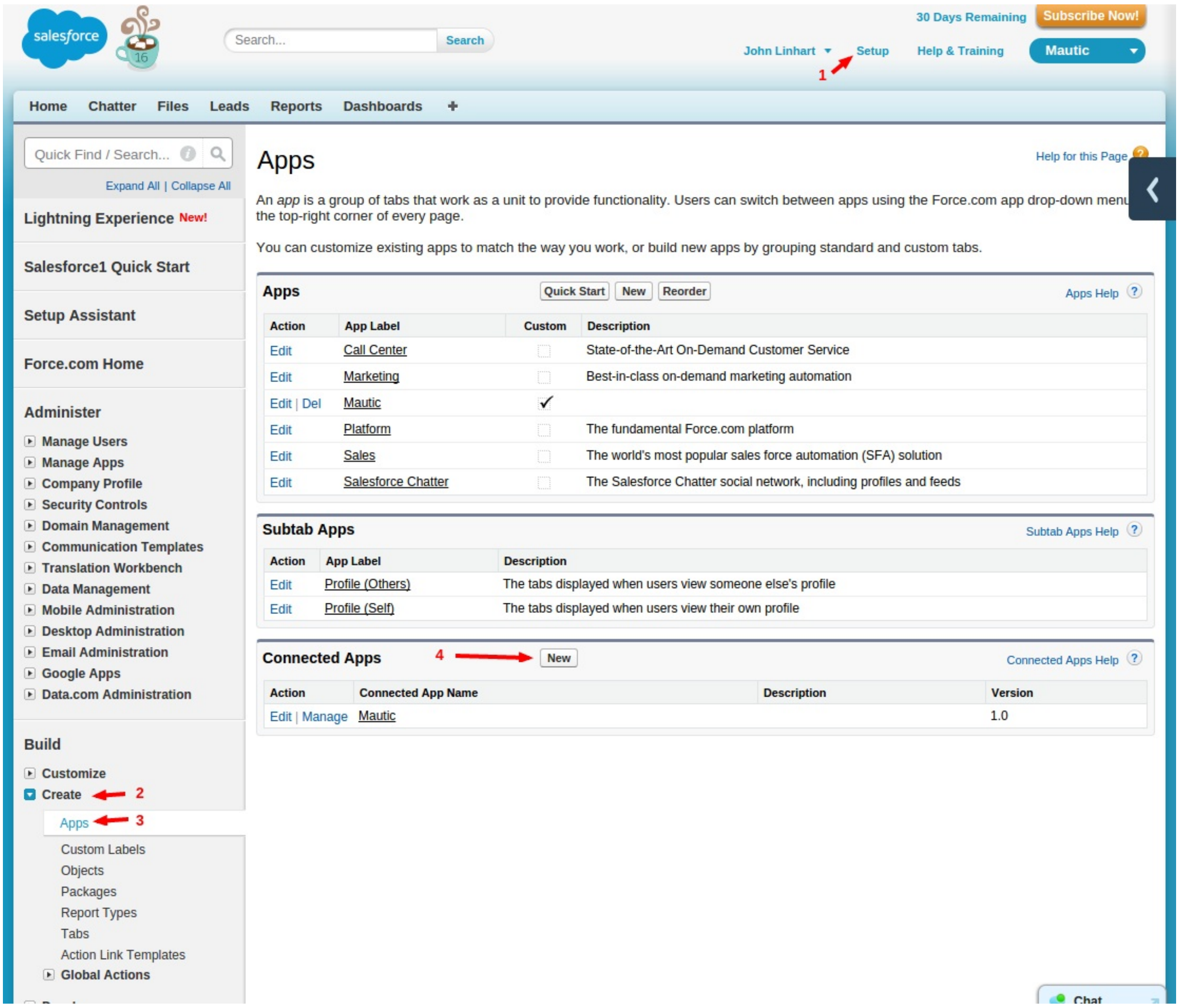
Configure the Mautic Salesforce plugin

Authorize App

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

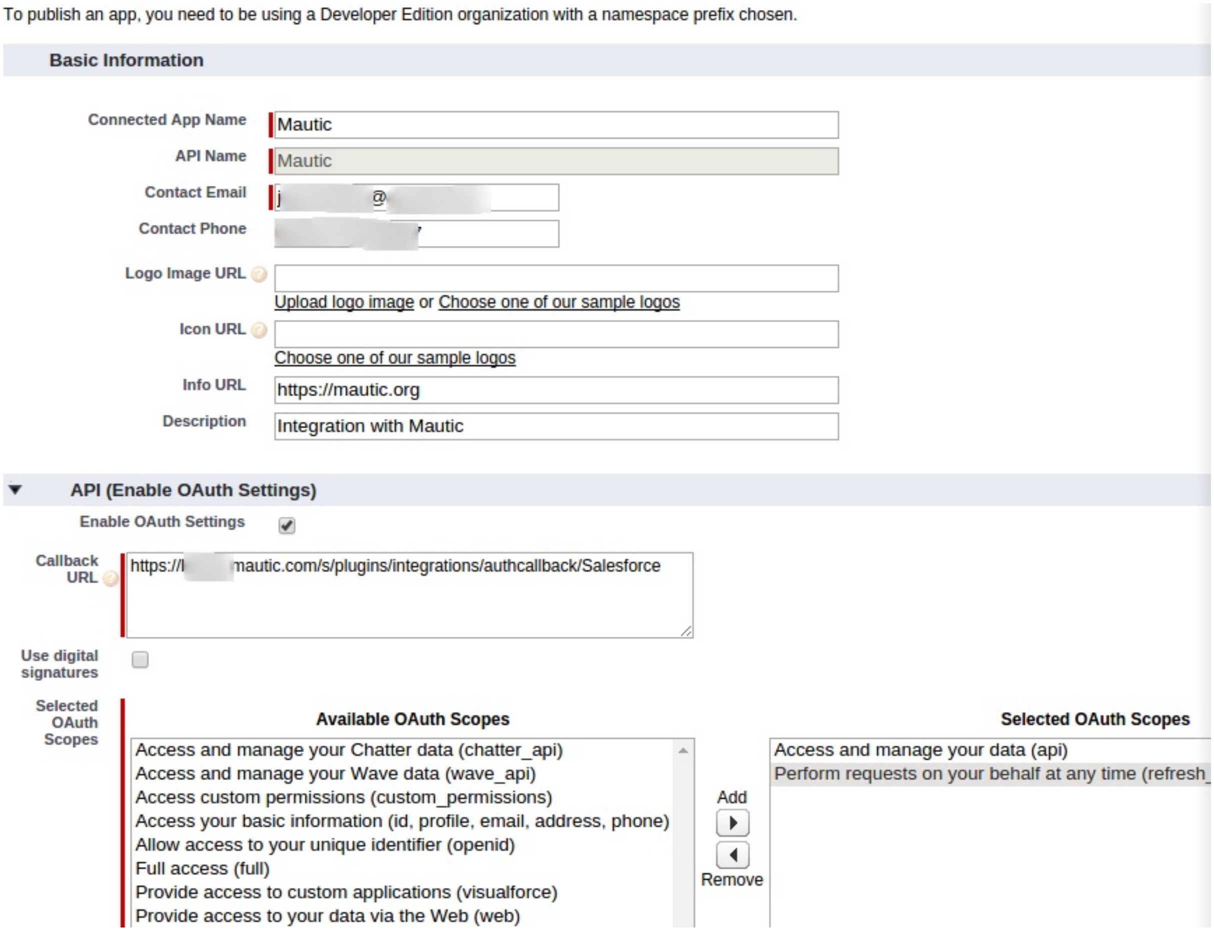
Follow these steps to get the Salesforce *Consumer* credentials

1. Click on *Setup* (top right corner)
   - Scroll down to *Build* in bottom left corner
2. *Create*
3. *Apps*
   - Scroll down to *Connected Apps*
4. Click *New*



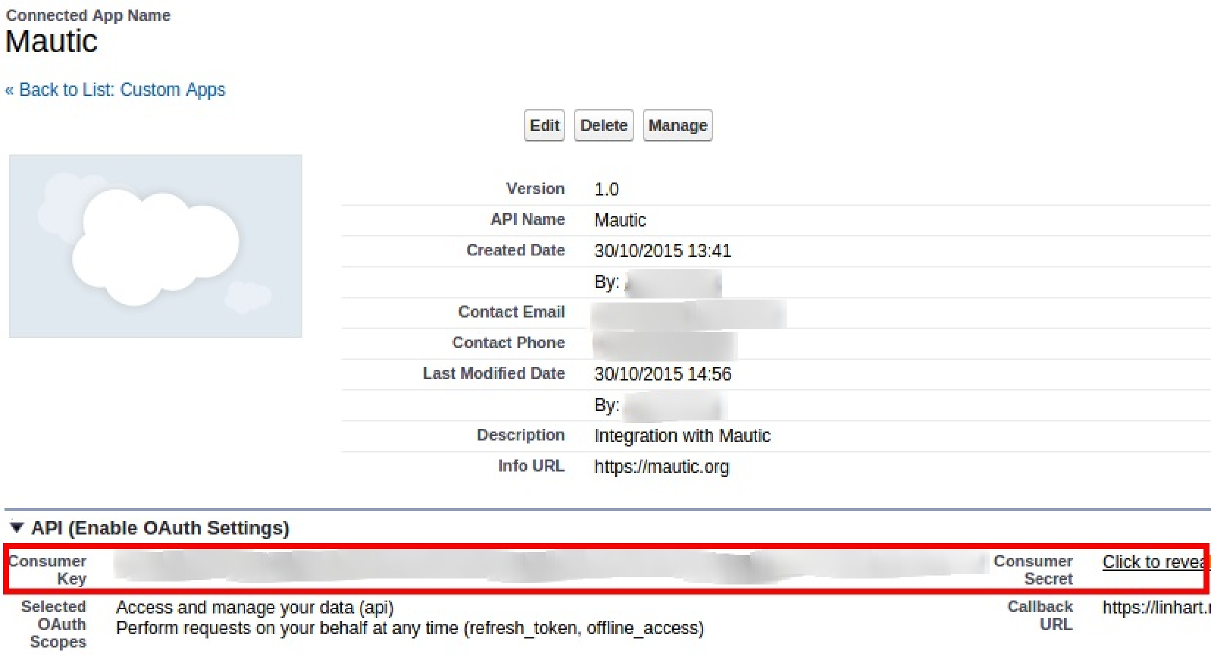
5. Create a new app like this:

| Field | Value | | ----: | :---- | | Connected App Name | Mautic | | API Name | Mautic | | Contact Email | your Salesforce account email | | Description | Integration with Mautic | | Enable OAuth Settings | <ticked> | | Callback URL (in [Mautic version 2.15](#)) | https://example.com/plugins/integrations/authcallback/Salesforce | | Selected OAuth Scopes | *Access and manage your data (api)*, *Perform requests on your behalf at any time (refresh_token, offline_access)* |



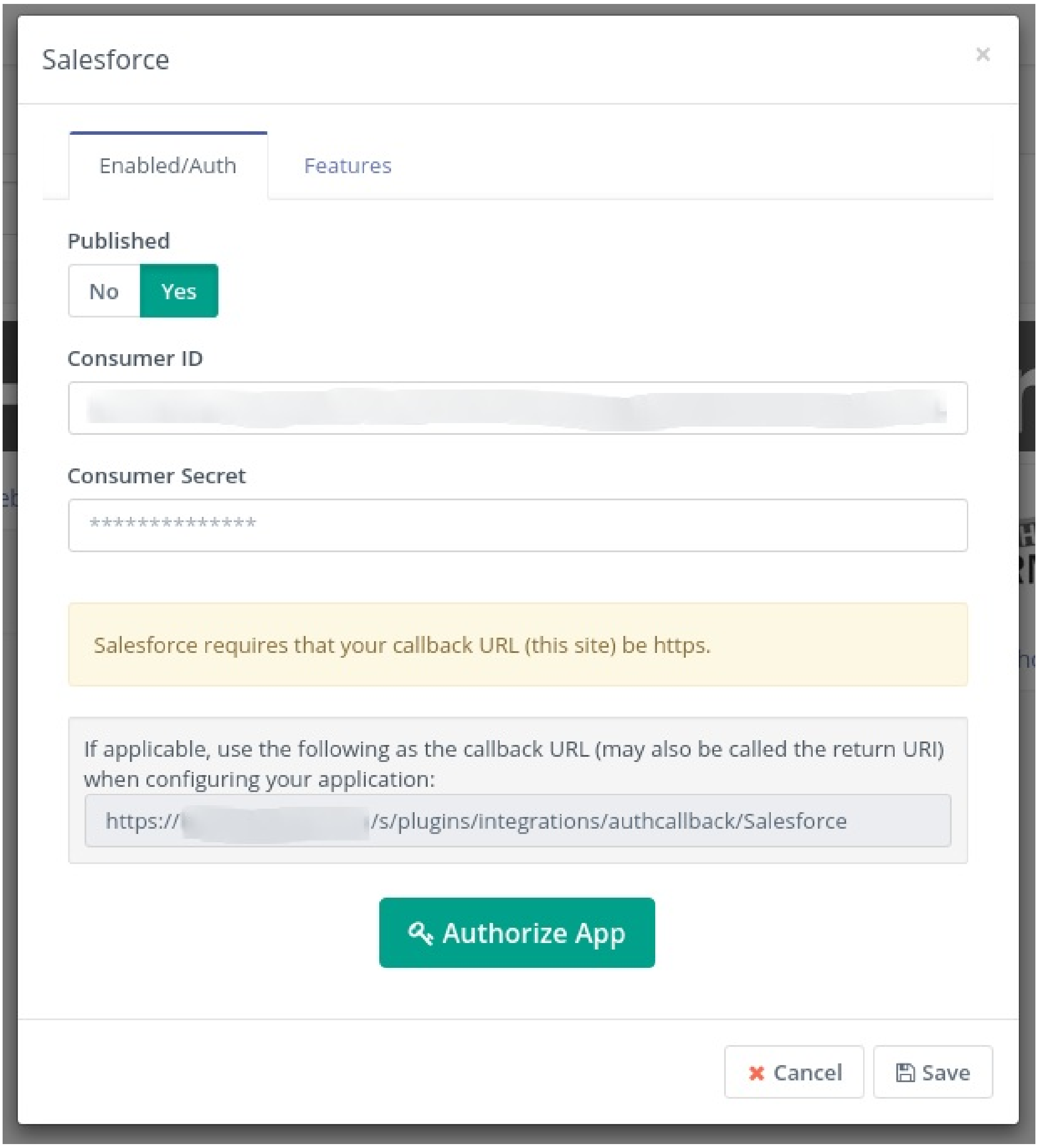
Make sure the Selected OAuth Scopes are *Access and manage your data (api)* and *Perform requests on your behalf at any time (refresh_token, offline_access)*.

6. Copy the Consumer Key and Secret.



7. Insert the credentials from the Salesforce App into the Mautic Salesforce plugin and *Authorize App*.

   Consumer ID is the *Consumer Key*



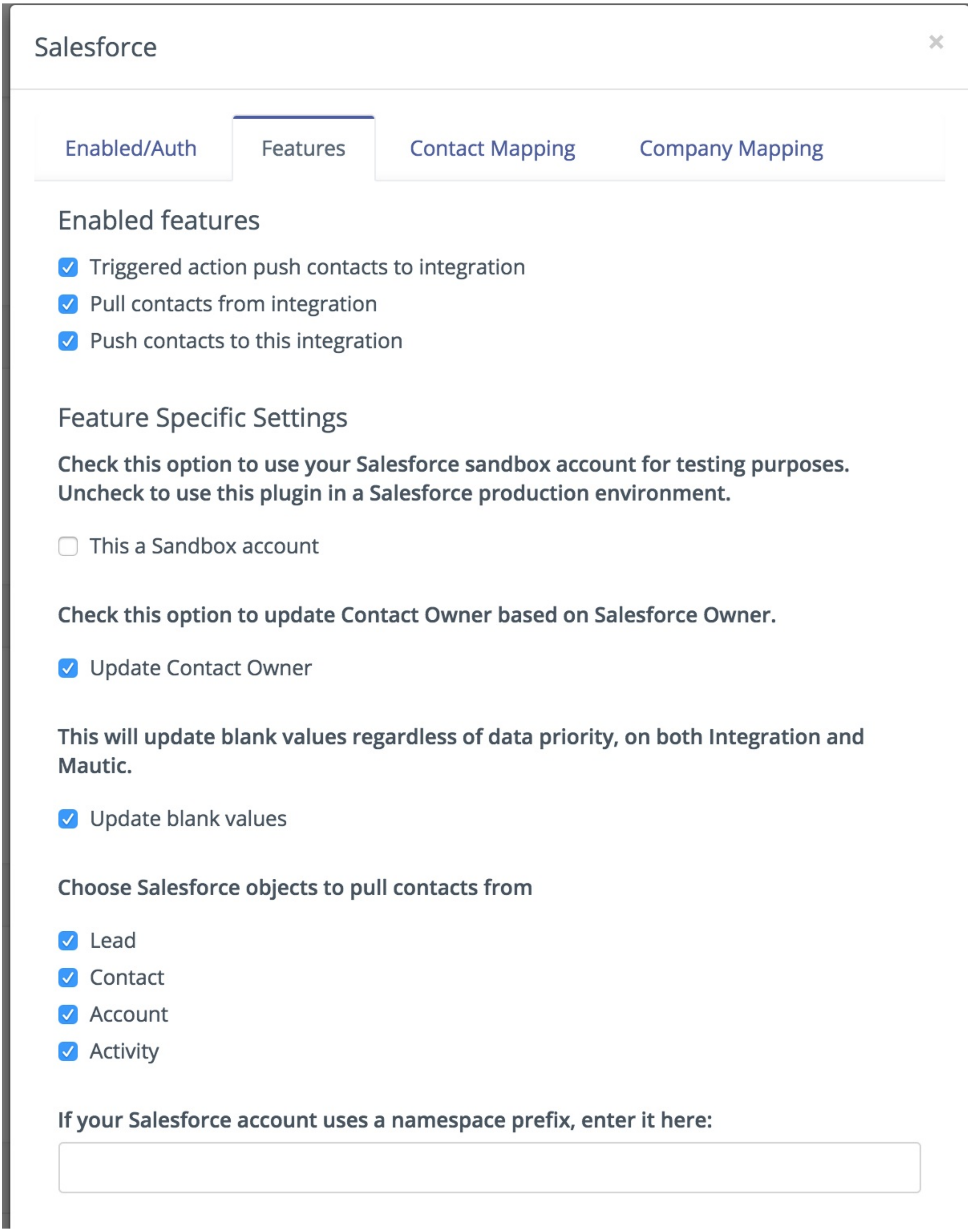
8. Configure the field mapping.

   - Formula fields from Salesforce will be pulled and can be saved into a Mautic custom field.
   - Salesforce's lead Id can be matched to 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 action or a Campaign action.
- Pull leads is done through command line and it can be setup as a cron job.



Feature specific settings

- Sandbox - when using a sandbox account to test, Mautic will use the test URL for the API provided by Salesforce.
- 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.
- If *Update blank values* is checked

- When pulling contacts from Salesfoce: it will check for fields mapped fields in Mautic and it will update these fields with Salesforce data regardless of the arrow direction set in the configuration.
- When pushing data to Salesforce it will check for blank mapped fields in Salesforce and it will update these with Mautic's data regardless of the directions of the arrows setup in the configuration.

- Select the objects you wish to pull or push records from.

  - You can push Mautic Contacts to the Lead and Contact object in Salesforce.
  - You can push activities (Contact's timeline records) to a custom object in Salesforce.
  - Pulling records will be done from Leads and/or Contacts objects into Contacts in Mautic and *Accounts* from Salesforce will be pulled into Mautic *Companies*.

Command to push/pull records from Salesforce

To push or pull records from Salesforce you need to run the Mautic integration commands:

Pull records from the Leads object in Salesforce

```
php app/console mautic:integration:synccontacts --integration=Salesforce
```

`mautic:integration:fetchleads` is a alias of this command.

Push activities to the Salesforce custom object described below

```
php app/console mautic:integration:pushactivity --integration=Salesforce
```

`mautic:integration:pushleadactivity` is a alias of this command.

Usage

Both commands take these parameters:

```
Usage:
  mautic:integration:pushactivity [options]
  mautic:integration:synccontacts [options]

Options:
  -i, --integration=INTEGRATION       Integration name. Integration must be enabled and authorised.
  -d, --start-date=START-DATE         Set start date for updated values.
  -t, --end-date=END-DATE             Set end date for updated values.
  -a, --time-interval[=TIME-INTERVAL]  Send time interval to check updates on Salesforce, it should be
                                      a correct php formatted time interval in the past eg:(-10 minutes)
```

`--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".

Setting up Mautic's Custom Object in Salesforce

To be able to push **Contact timeline** activities to the Salesforce integration you need to setup a Custom Object in Salesforce, as described below.

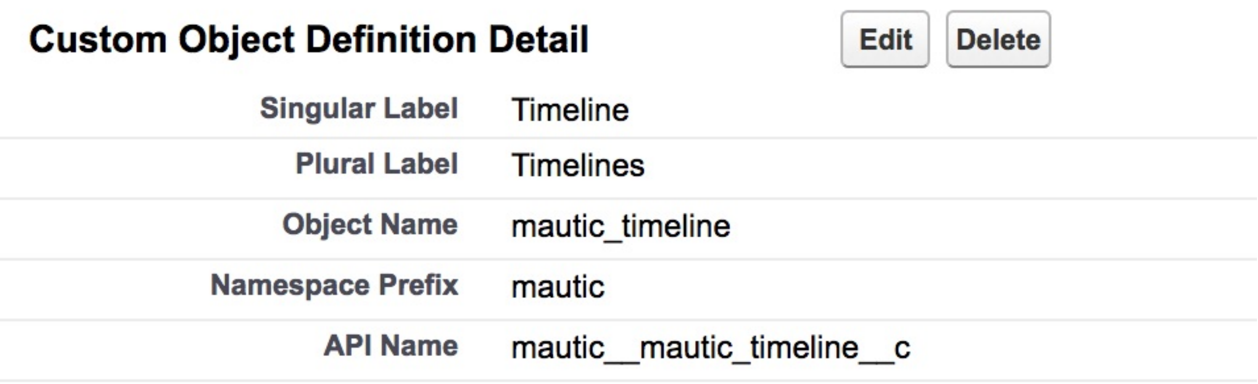
We will describe the name of the fields and object that result after completing the process of creating the Custom Object.

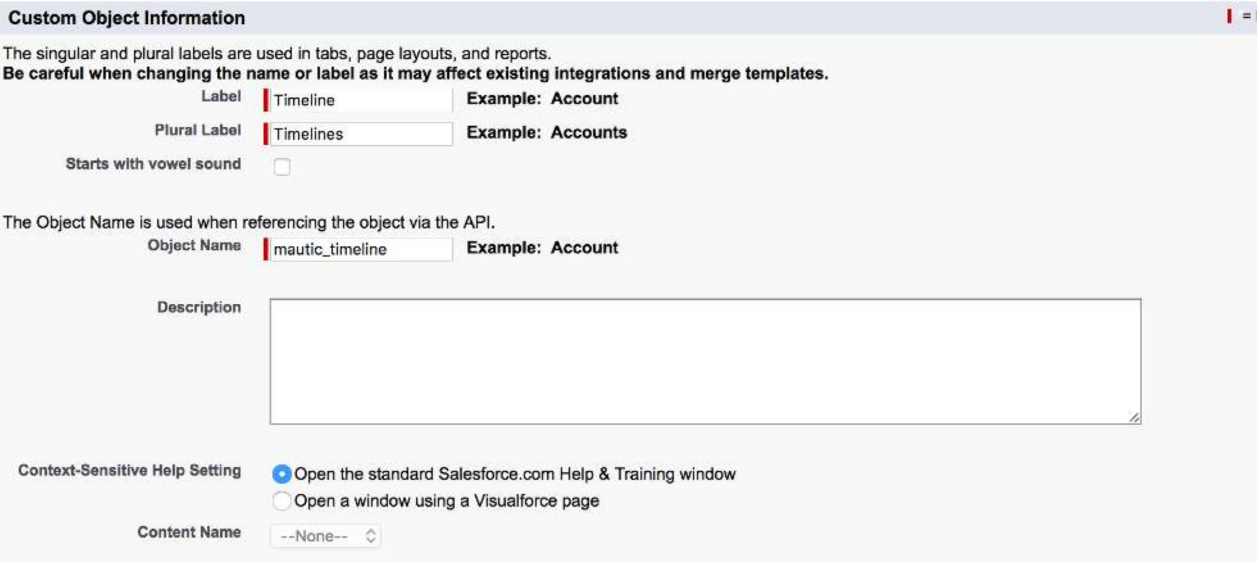
In this example, Salesforce has given the Custom Object a *namespace name* of `mautic__` . (Note: there are two underscores with no space between).

Use the text in bold when creating your custom fields.

Custom Object Information

Field	Value
Custom Object name	(namespace)**mautic_timeline**
Label	Timeline
Plural Label	Timelines
Object name	**mautic_timeline**
Namespace Prefix	mautic (no underscores)
API name	(namespace)**mautic_timeline**__c



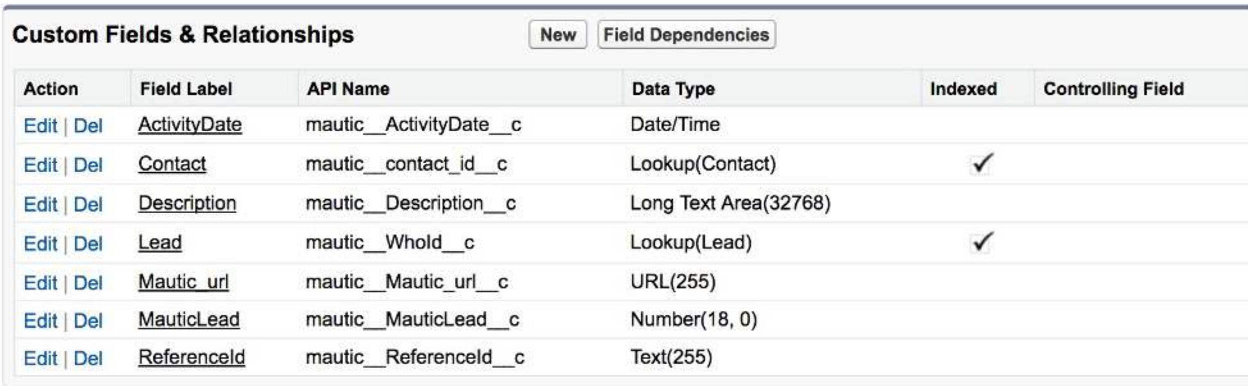


Custom Fields & Relationships

API names of fields:

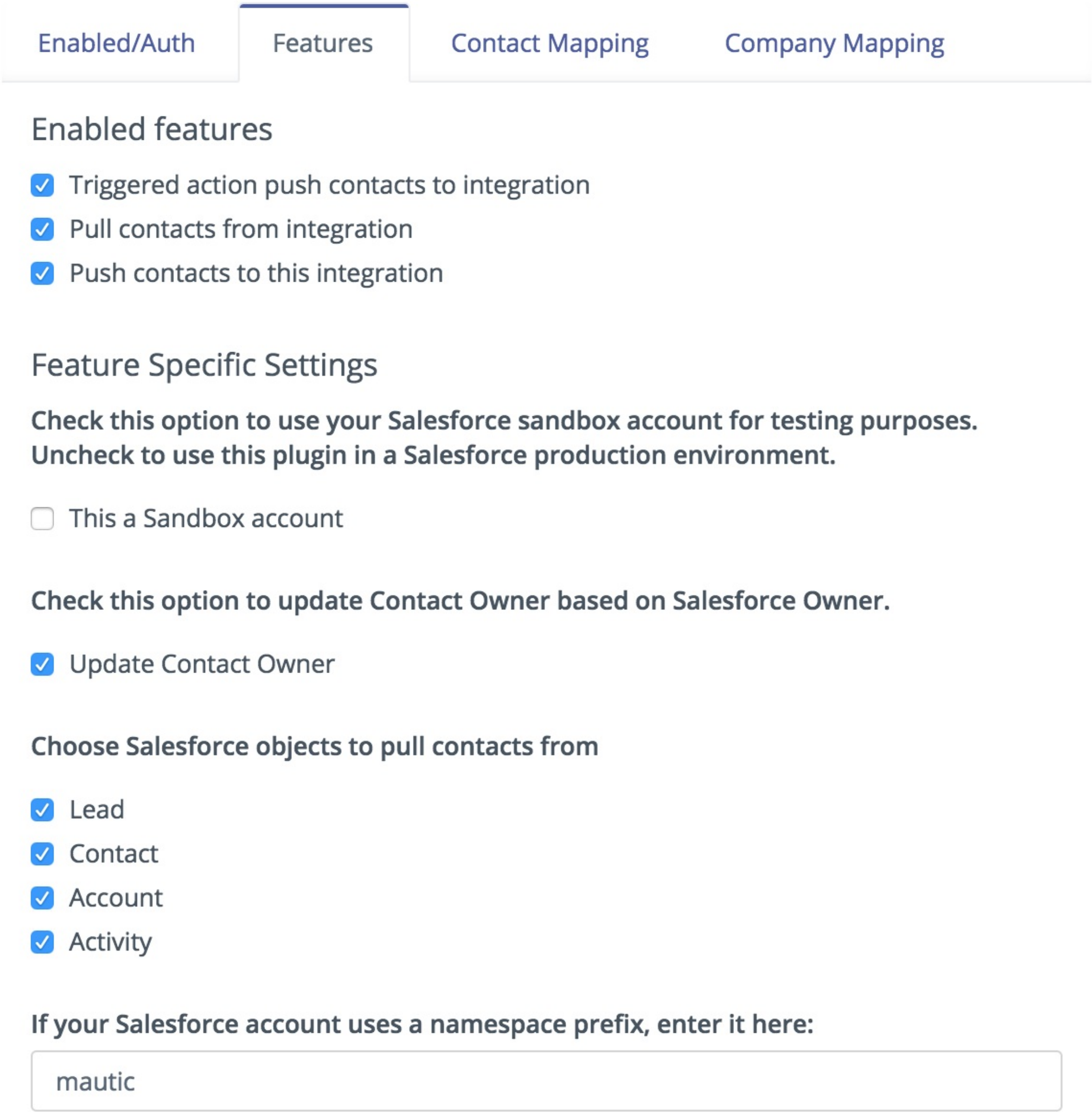
> `ReferenceId` must be set as a unique field in Salesforce to prevent duplicating activity entries

Field Label	API Name	Data Type	Indexed
ActivityDate	(namespace)**ActivityDate**__c	Date/Time	.
Contact	(namespace)**contact_id**__c	Lookup(Contact)	x
Description	(namespace)**Description**__c	Long Text Area(131072)	.
Lead	(namespace)**WhoId**__c	Lookup(Lead)	x
Mautic_url	(namespace)**Mautic_url**__c	URL(255)	.
MauticLead	(namespace)**MauticLead**__c	Number(18, 0) (External ID)	.
ReferenceId	(namespace)**ReferenceId**__c	Text(255)	.

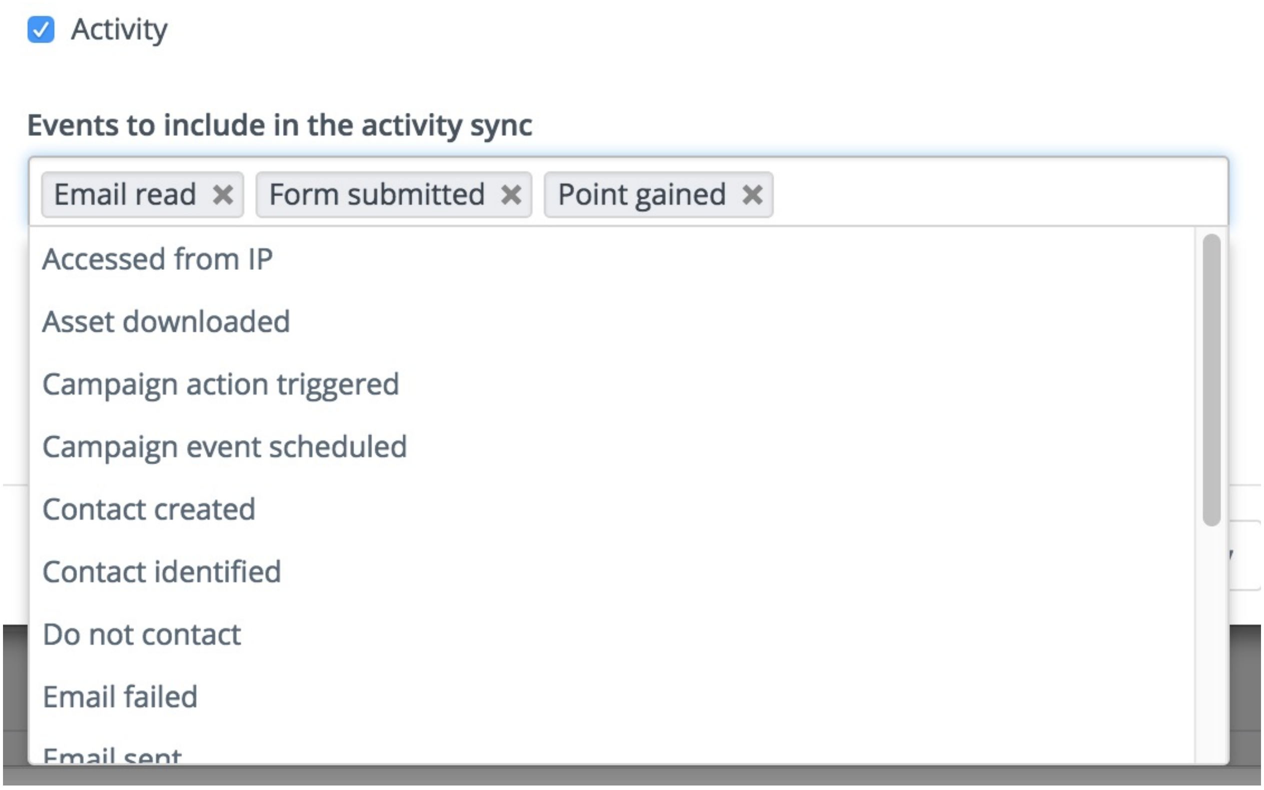

Custom Fields & Relationships New Field Dependencies

Action	Field Label	API Name	Data Type	Indexed	Controlling Field
Edit | Del	ActivityDate	mautic__ActivityDate__c	Date/Time		
Edit | Del	Contact	mautic__contact_id__c	Lookup(Contact)	✓	
Edit | Del	Description	mautic__Description__c	Long Text Area(32768)		
Edit | Del	Lead	mautic__WhoId__c	Lookup(Lead)	✓	
Edit | Del	Mautic_url	mautic__Mautic_url__c	URL(255)		
Edit | Del	MauticLead	mautic__MauticLead__c	Number(18, 0)		
Edit | Del	ReferenceId	mautic__ReferenceId__c	Text(255)		

When enabling the activity object, you need to tick the Activity checkbox in the Mautic plugin configuration and also specify the namespace prefix if it's available in Salesforce



You can filter what contact timeline activities to push to your custom object in Salesforce using the **Events to include in the activity sync** selector. If this is left blank all activity types will be pushed to your activity object in Salesforce.



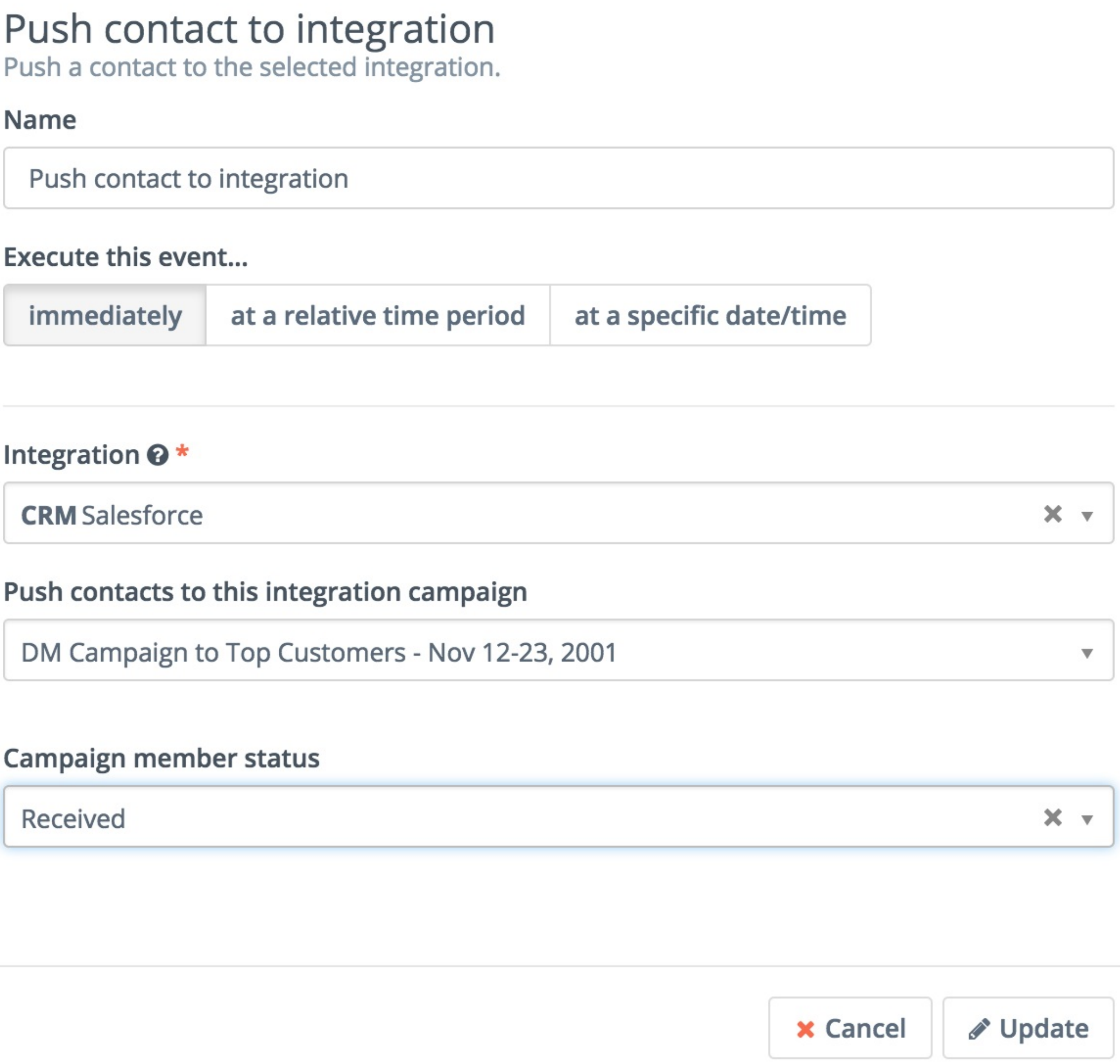
Salesforce Campaigns and Mautic

Mautic can communicate with Salesforce campaigns through trigger actions in Mautic Campaigns and Forms, and through Mautic Segments.

In Mautic Campaigns

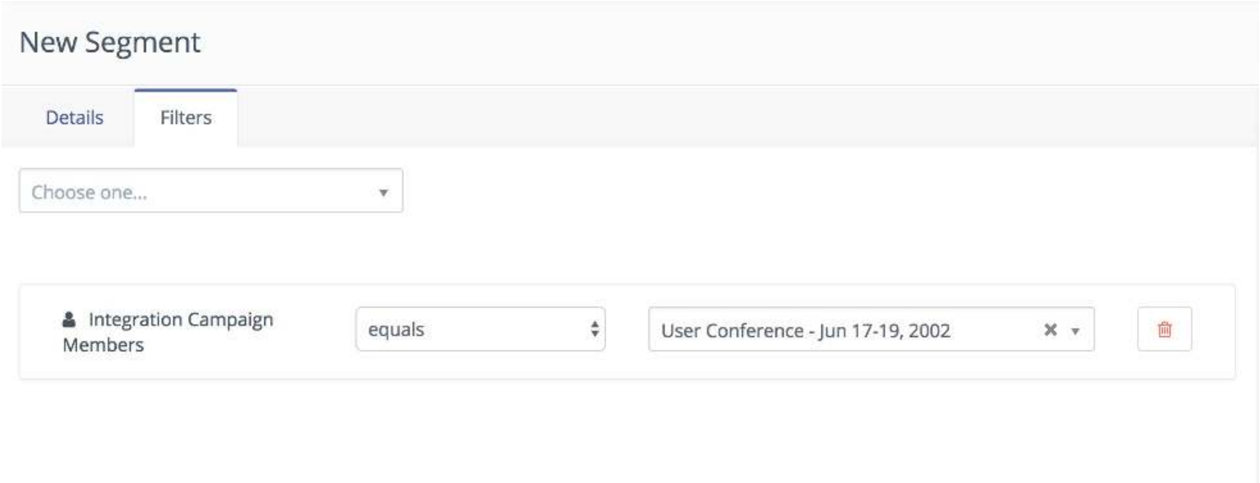
In a campaign you can Push contacts to Salesforce integration, to a specific campaign. From the configuration window you can select the campaign and the status you wish your campaign members to have when inserted to the Salesforce campaign.

Follow similar procedure for a Form action to push to Salesforce integration.



In Mautic Segments

You can create a Mautic Segments composed of Contacts that are in a Salesforce campaign. To do this create a segment filter ***Integration Campaign Member*** option, then in the filter properties select the name of the campaign you wish to get campaign members from.

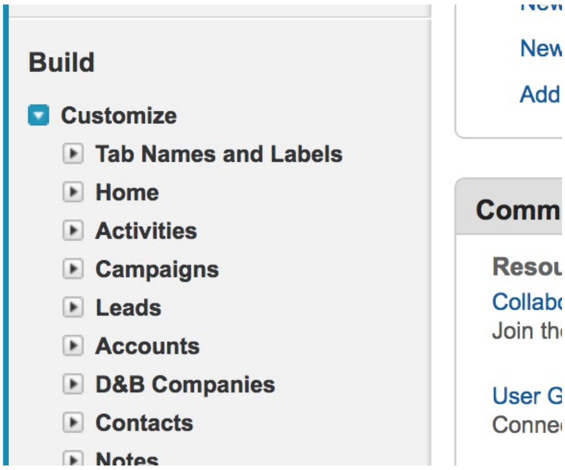


Syncing Salesforce Email Opt Out with Mautic Do Not Contact

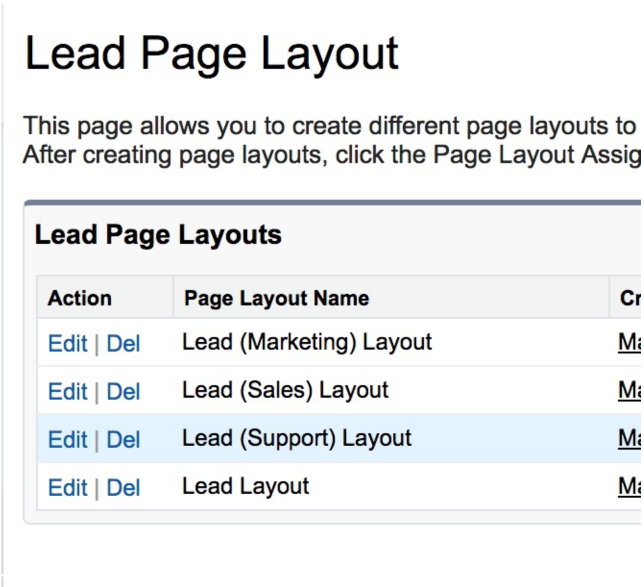
Prepare Salesforce

In Salesforce, make sure the *Email Opt Out* field is visible to edit and that field history tracking has been set for the *Email Opt Out* field.

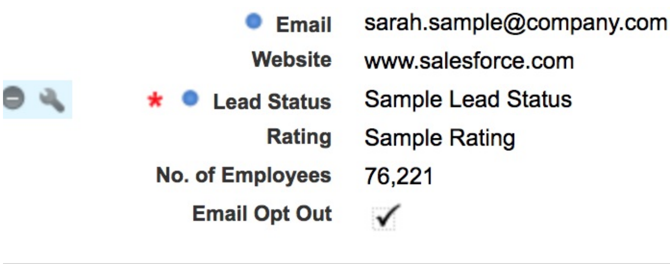
a. Under the Setup menu, go to Build -> Customize then do the following for each of Lead and Contact's layouts



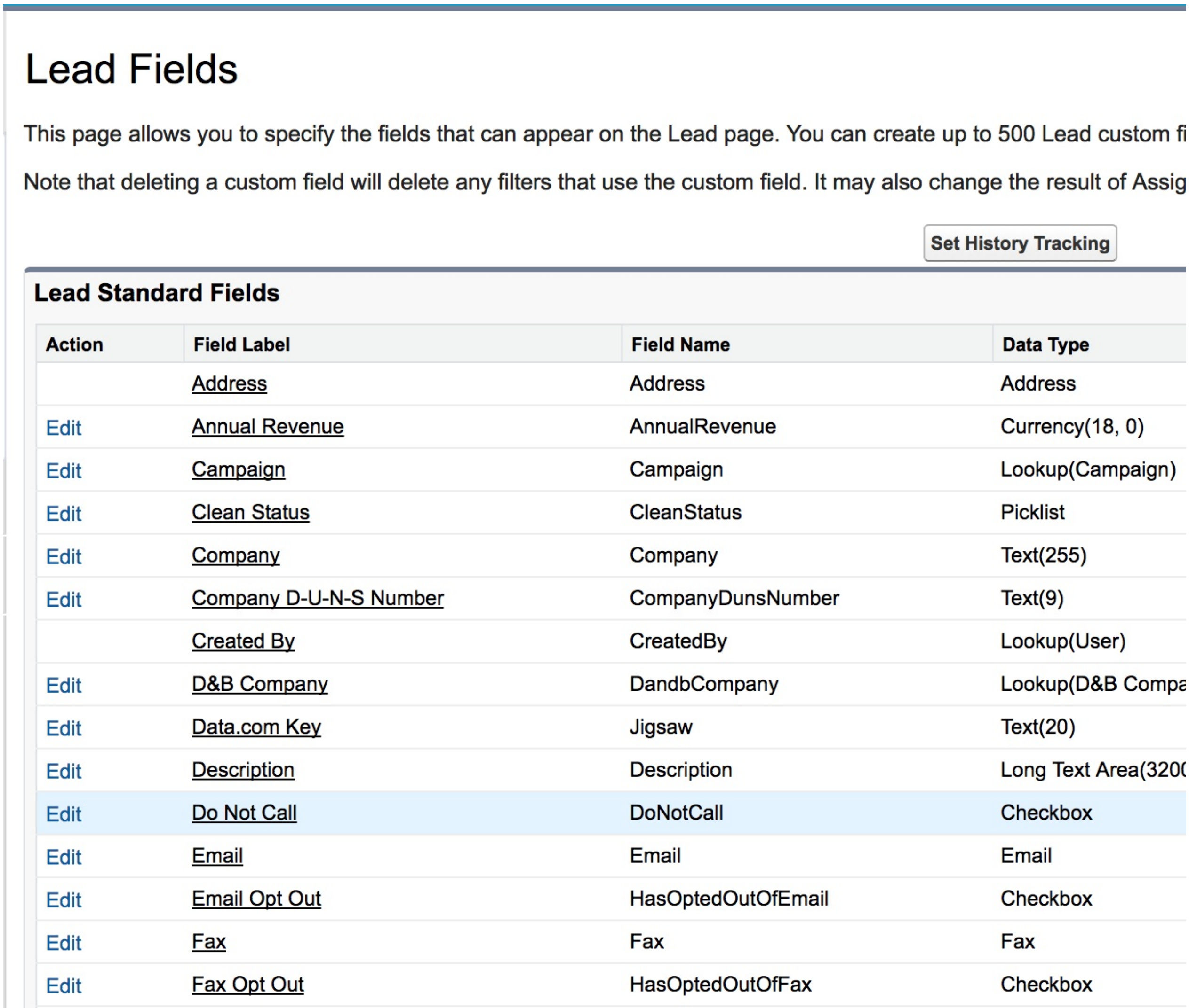
a. Add the Email Opt Out field



a. Continue by going to the customise fields



a. Select the *Email Opt Out* field and edit the field level security option



Lead Fields

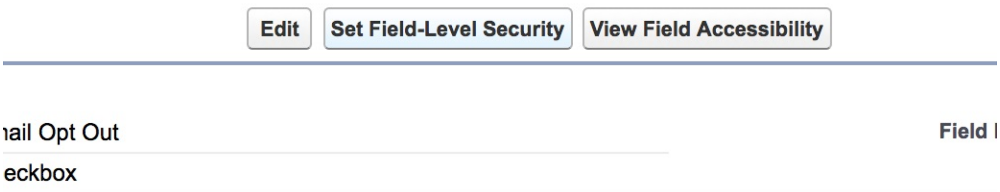
This page allows you to specify the fields that can appear on the Lead page. You can create up to 500 Lead custom fi

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assig

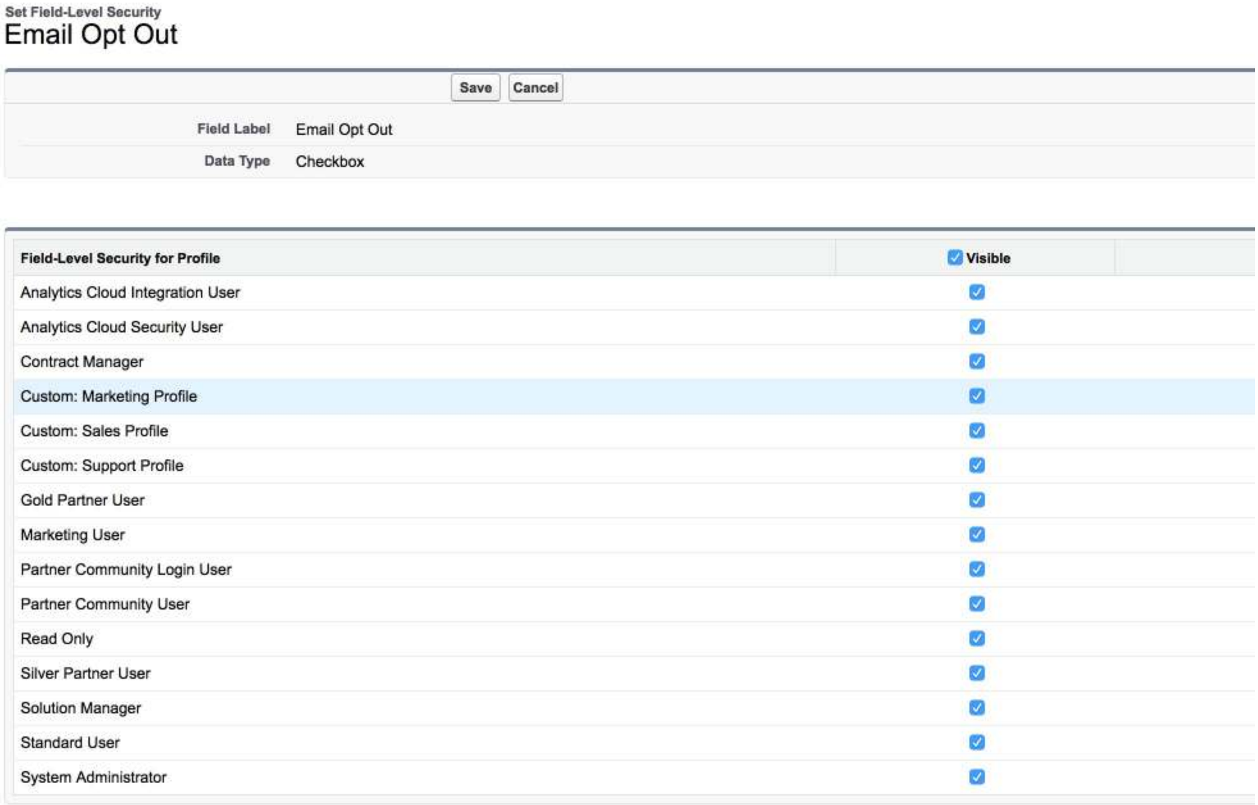
Set History Tracking

Lead Standard Fields

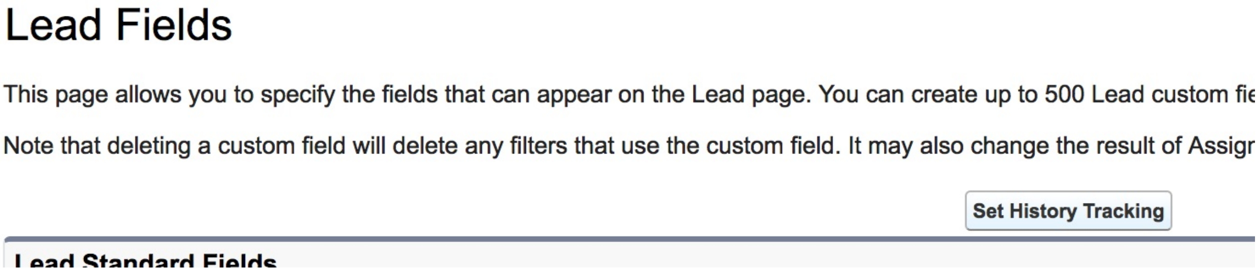
Action	Field Label	Field Name	Data Type
	Address	Address	Address
Edit	Annual Revenue	AnnualRevenue	Currency(18, 0)
Edit	Campaign	Campaign	Lookup(Campaign)
Edit	Clean Status	CleanStatus	Picklist
Edit	Company	Company	Text(255)
Edit	Company D-U-N-S Number	CompanyDunsNumber	Text(9)
	Created By	CreatedBy	Lookup(User)
Edit	D&B Company	DandbCompany	Lookup(D&B Compa
Edit	Data.com Key	Jigsaw	Text(20)
Edit	Description	Description	Long Text Area(320(
Edit	Do Not Call	DoNotCall	Checkbox
Edit	Email	Email	Email
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox
Edit	Fax	Fax	Fax
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox

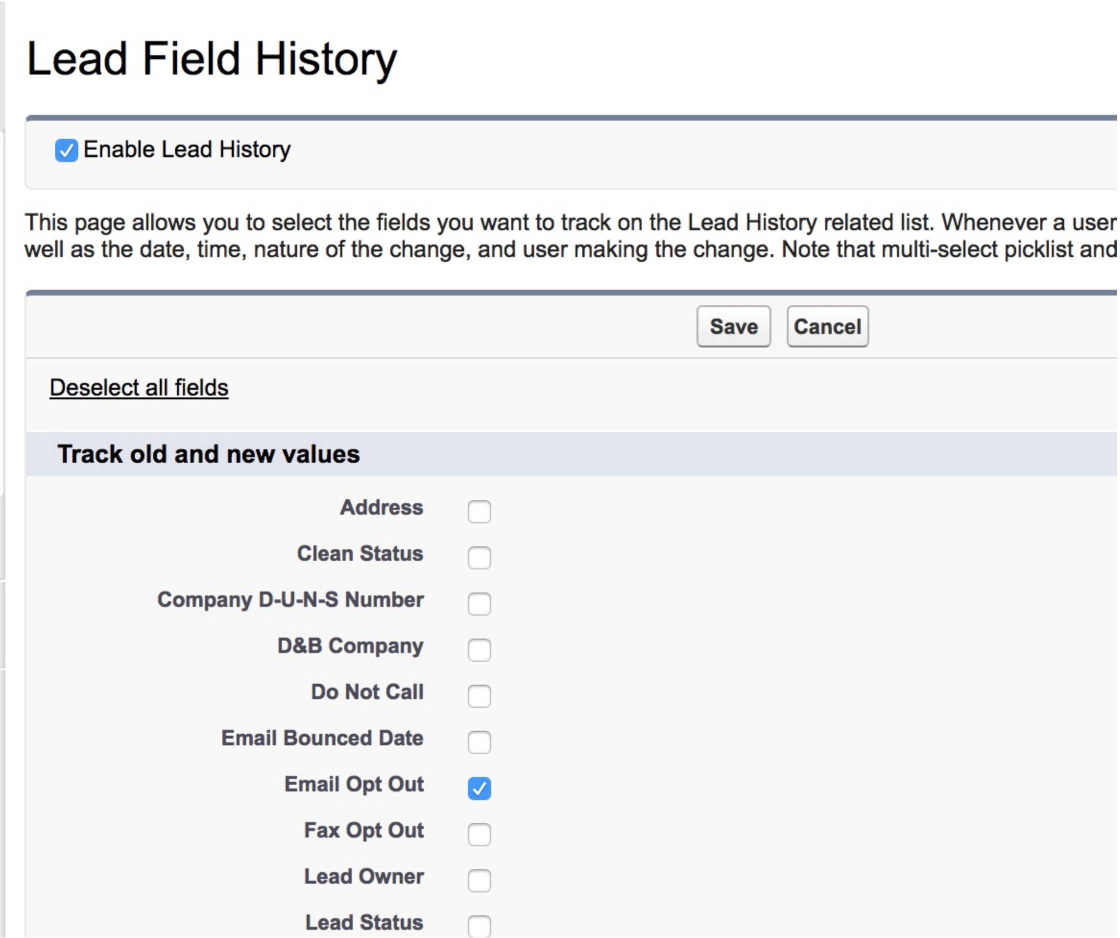


a. Check to see if the field is visible at all levels. If not, select it and save.



a. Setup Field History by going to Setup->Customize->Leads->Fields menu (and also the Contacts fields menu) and *Set History Tracking* on the *Email Opt Out* fields





Prepare Mautic

1. In Mautic's configuration for the Salesforce integration, on the *Features* tab, check the box to `Use latest updated Do Not Contact record`
2. Map the Salesforce `Email Opt Out` field to Mautic's `Do Not Contact by email` field
3. Now the Do Not Contact status will update to the integration

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 - SugarCRM plugin

Bi-directionnal sync. has been added in Mautic 2.8.0, this plugin can push a contact to SugarCRM when a contact makes some action (SugarCRM 6 Community & 7.x) or if updated (SugarCRM 6 Community). It can also pull leads, contacts and companies from SugarCRM (SugarCRM 6 Community). If you don't have the SugarCRM account yet, create it.

Requirements

SSL. Your Mautic instance has to run on HTTPS. SugarCRM will not allow you to synchronize with an application in HTTP.

Get the SugarCRM client credentials

To enable the SugarCRM plugin, you'll need to get API credential (Oauth keys) from your SugarCRM account (public and private key) and a valid username and password.

Configure the Mautic SugarCRM plugin

1. Insert the keys to the Mautic SugarCRM plugin and authorize it.
2. Configure the features you want to enable
3. Configure the field mapping for contacts
4. Configure the field mapping for companies
5. Save and close the configuration panel

Features

Enabled features:

- You can push contacts to the integration anytime the contact is created/modified by checking the "push contacts to the integration" checkbox.
- You can push contacts to the integration only when the contact go through a "push contacts to the integration" action in campaigns, forms and point triggers by uncheck the "push contacts to the integration" checkbox.
- You can pull records from integration
- You can select which type of records you want to push/pull to/from SugarCRM: Leads, Contacts and Companies.
- You can synchronize contact owner between SugarCRM and Mautic
- You can select which Contacts/Leads/Companies field values you want to synchronize.
- Select a priority in terms of data when the targeted field is already mentioned with a value.

Command line script to push/pull records to/from SugarCRM

To synchronize records from/to SugarCRM you need to use a command from CLI. Use this command:

- `php app/console mautic:integration:fetchleads`

To push activities of synchronized contacts from Mautic to CRM use the following command:

- `php app/console 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". Default for both commands is “15 minutes”.
- **--integration=Sugarcrm** to use with SugarCRM integration. In future this command may be used for other integrations. Parameter specific to php app/console mautic:integration:fetchleads
- **--fetch-all** To synchronize all contacts to and from integration. Preferably, use this command only after installation.

These commands may be used for other integrations.

Do Not Contact integration

Enable option **Update emails Do Not Contact** on plugins features tab allow:

- Sugar CRM to Mautic - sync just unsubscribed status to Mautic due Sugar CRM api limitations
- Mautic to Sugar CRM - sync both unsubscribed and bounced status

Test the plugin

Follow these steps to test the integration.

Credits

This feature has been developed by @Webmecanik and @canal-web.

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.

Warning The cloud Vtiger instances have the *Leads* module disabled by default. This will cause error message `Permission to perform the operation is denied` on plugin edit form. Enable the *Leads* module and the plugin load the custom field mapping form.

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 *Push contacts to this integration* checkbox and it is checked by default.

You can also configure whether you want to map Vtiger's *Leads* to Mautic's *Contacts* and/or Vtiger's *Organizations* to Mautic's *Companies*.

Configure the field mapping.

Save the plugin configuration.

Test the plugin

Follow these steps to test the integration.

Mautic Zapier Integration

This integration integrates any Mautic instance with 1.100+ third party web services via the Zapier web automation service.

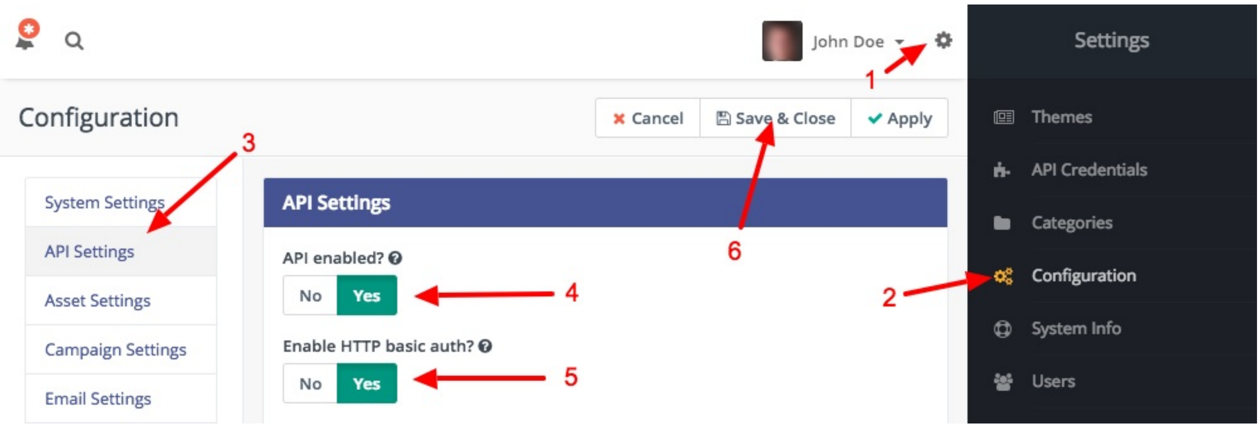
Requirements

1. Mautic version 2.9.0 or newer with SSL - basic authentication requires HTTPS to be secure.
2. Zapier account. Free or Paid. View Zapier pricing.

Installation

There is no need to install any additional plugin to your Mautic instance. Zapier works with the API and webhooks already available within Mautic. This Zapier integration use Basic Authentication to access Mautic API. It is disabled by default so enable this first.

1. Open the admin menu
2. Go to Mautic's global configuration
3. Go to API Settings
4. Set **API enabled?** to **Yes**.
5. Set **Enable HTTP basic auth?** to **Yes**.
6. Save the configuration.



Zapier will be able to create actions and triggers with your Mautic installation.

Sign up for a Zapier account

1. Go to the Zapier website.
2. Select the "Sign Up for Free" button.

Or log into your existing Zapier account.

Setup and configuration

The configured Zapier integrations are called Zaps. The main types of Zaps are Triggers and Actions.

- Triggers send data about some actions that happen in Mautic in realtime to Zapier. Zapier then transforms the data and sends it to the next app you have configured in the Zap.
- Actions send data from some other app into Mautic.

Supported Triggers

- [x] **New Contact** - *contains contact info and field values*
- [x] **Updated Contact** - *contains contact info and field values*
- [x] **Contact Points Changed** - *contains contact info, point value and field values*
- [x] **Email Viewed** - *contains contact info and field values and info about the email*
- [x] **New Page Hit** - *contains contact info and field values, info about the page hit and the page itself*
- [x] **New Form Entry** - *contains contact info and field values, info about the form and about the submission including submitted values*

Supported Actions

- [x] **Create or Update Contact**

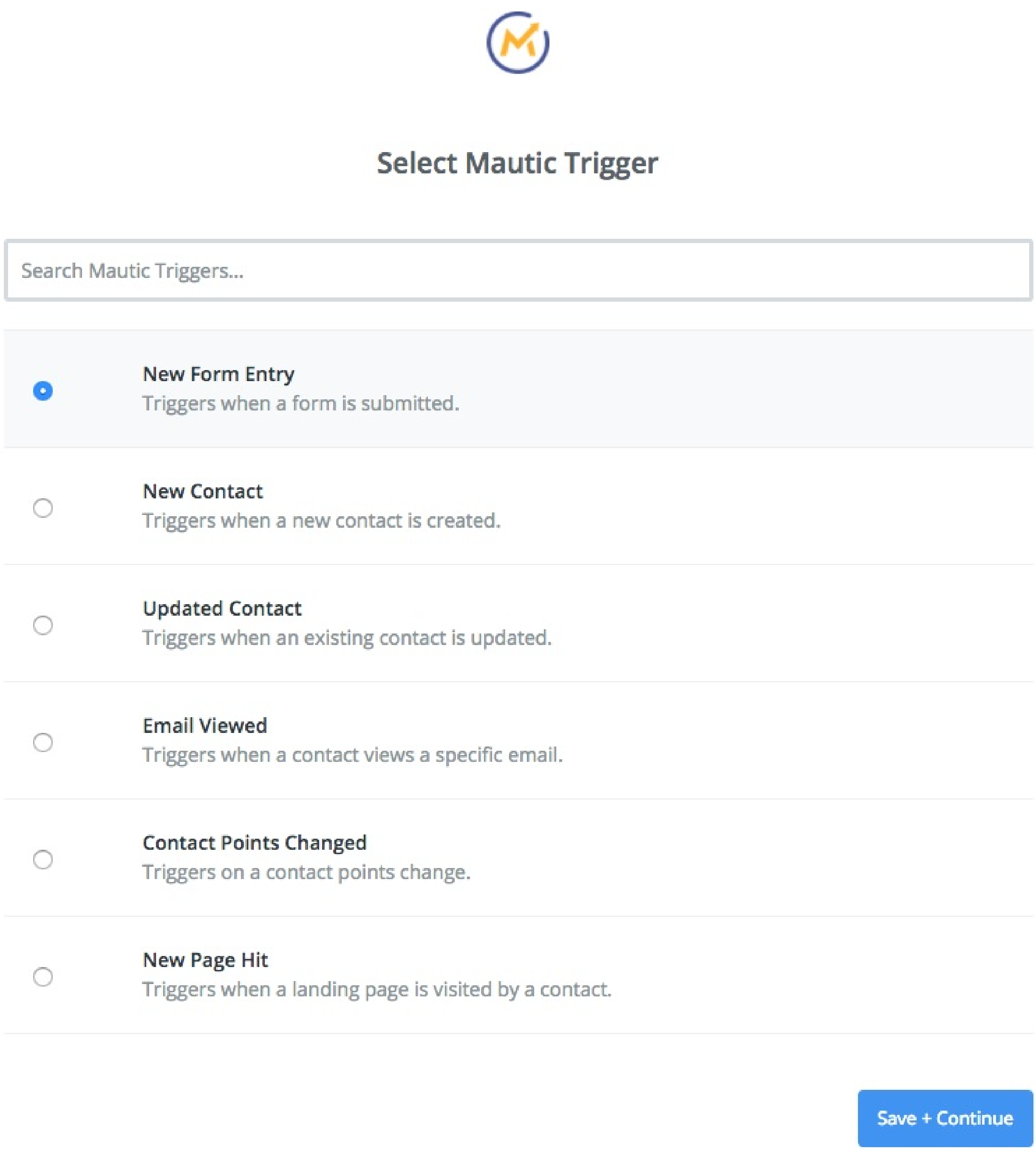
1. Find Mautic integration

When you click on *Make a Zap!* button, search for Mautic. You may see some unofficial Mautic integrations there. We recommend to use this one. It will always be called "Mautic (2.1.0)". Of course the version number will change in time. The latest version number is available within each changelog at https://github.com/mautic/mautic-zapier/releases.

If you want some inspiration or speed up the process of creating a Zap use preconfigured Mautic Zap templates:

2. Choose a Trigger or Action

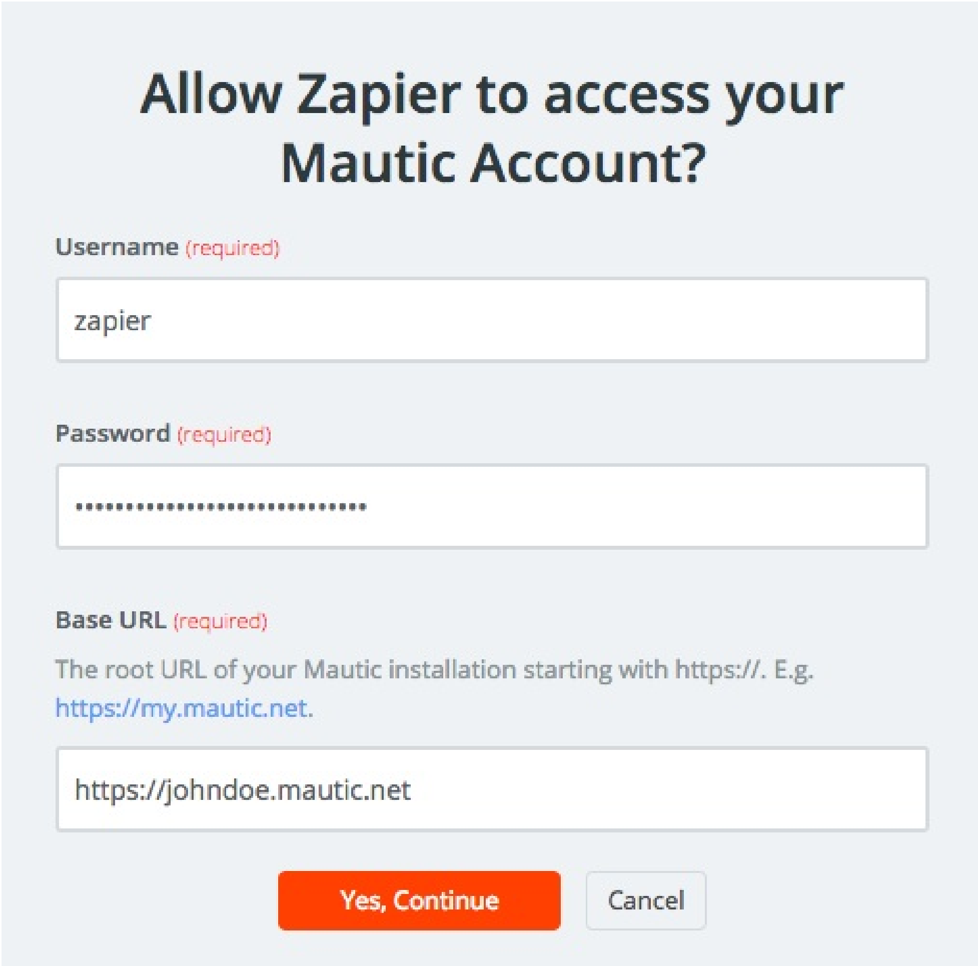
At this point choose which Trigger or Action you need. Each trigger will get you some data about the Mautic event (page hit, email viewed, form submitted) and about the contact who did the event.



3. Authorize Mautic instance

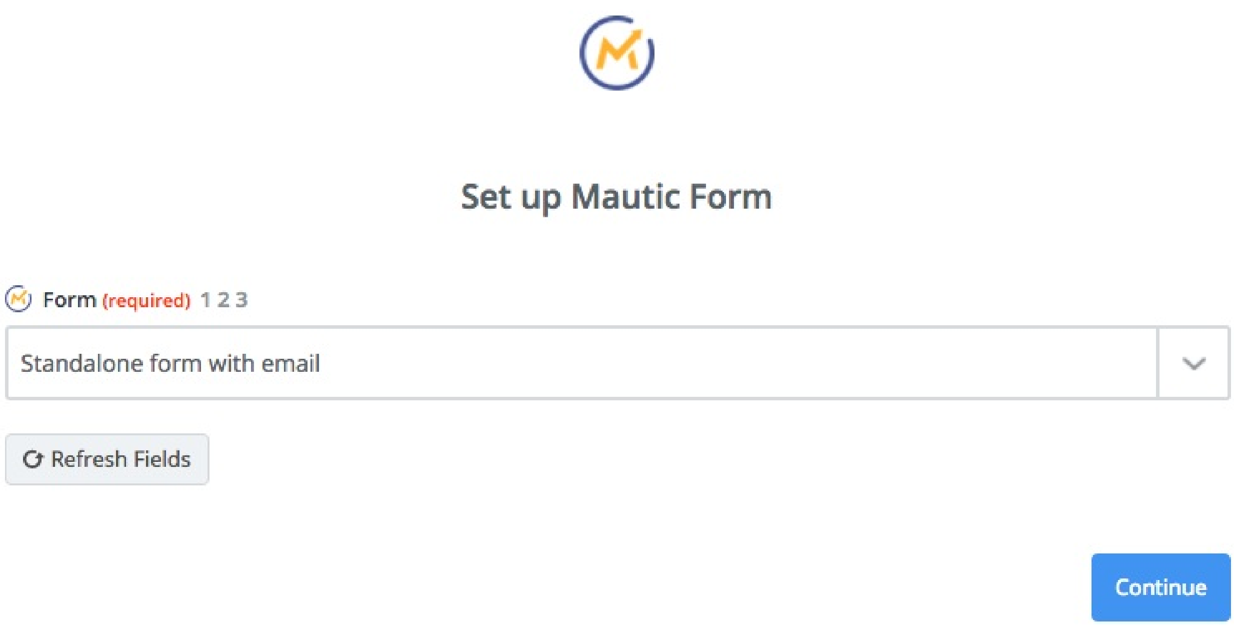
Once you choose to use Mautic integration you'll need to authorize your Mautic to it. Mautic use basic auth as mentioned earlier. So all you need is a Mautic user credentials and URL of where your Mautic lives. It's recommended to create a new user for Zapier which will have some advantages:

1. Giving a third party app credentials to your Mautic is a security risk. If something happens you simply delete this special Zapier user and your admin user will be safe.
2. You will see what contacts were created by Zapier simply by looking at the created by user.



4. Select an item for Triggers

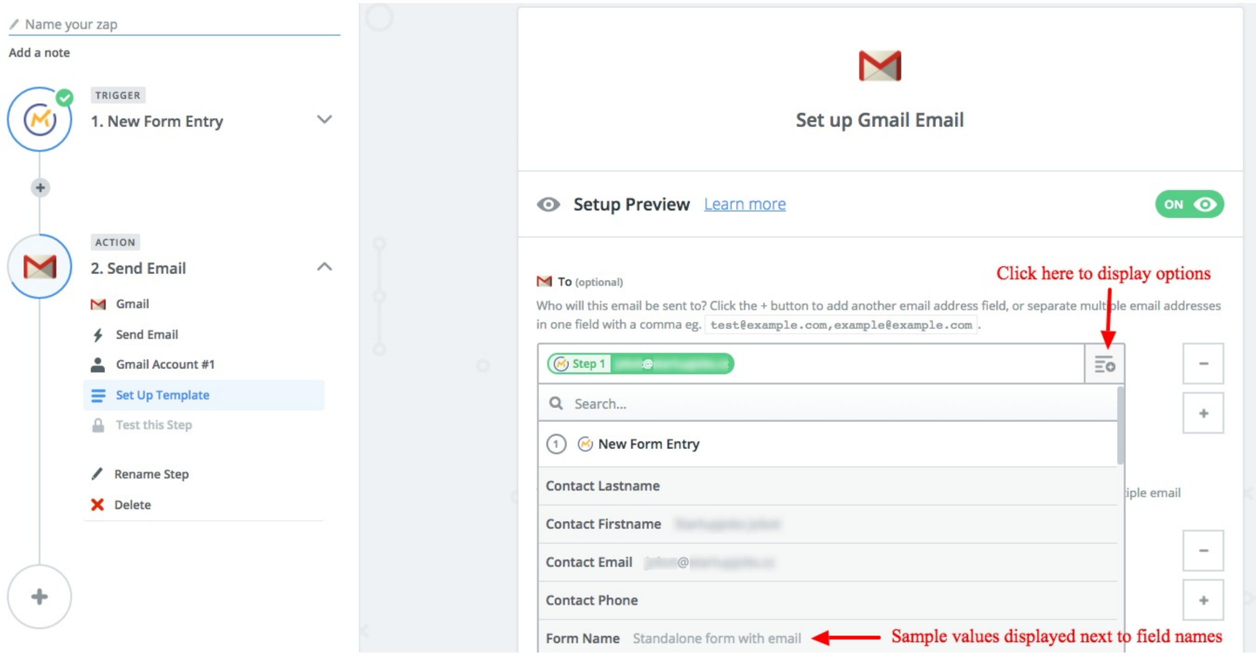
Triggers will ask you to choose which entity you want to record events about. This step is required for Form Submission trigger because every form has different form fields, but it's optional for others. If you skip this step for for example Page Hits trigger Zapier will process all page hit events.



Zapier will let you test the integration you just configured.

5. Map fields

Now map the Mautic fields to the fields of the other app. In the image below is an example of mapping Mautic fields from Mautic's New Form Entry Trigger to GMail's Send Email Action.



That's it! Now if a contact submits a Mautic form the contact gets an email. Okay, so Mautic can do that on its own, but you get the general idea.

How does this work

This happens when you create a new action or trigger at Zapier.

1. Zapier creates a new webhook via Mautic API at your Mautic instance specifically for this one Zap. Mautic will then send all events related to the trigger or action type to Zapier.
2. Zapier lets you map Mautic fields to the fields of the integration you want to connect to Mautic.
3. Once you make your Zap active Mautic will start receiving data (in the case of actions) and sending data (in the case of triggers).

Integration development

Even this integration is developed as an open source software as is usual with Mautic community. Learn more at https://github.com/mautic/mautic-zapier.

Mautic - Zoho CRM plugin

Mautic can push a contact to Zoho CRM based on Contact actions or Point Triggers.

Language configuration warning

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

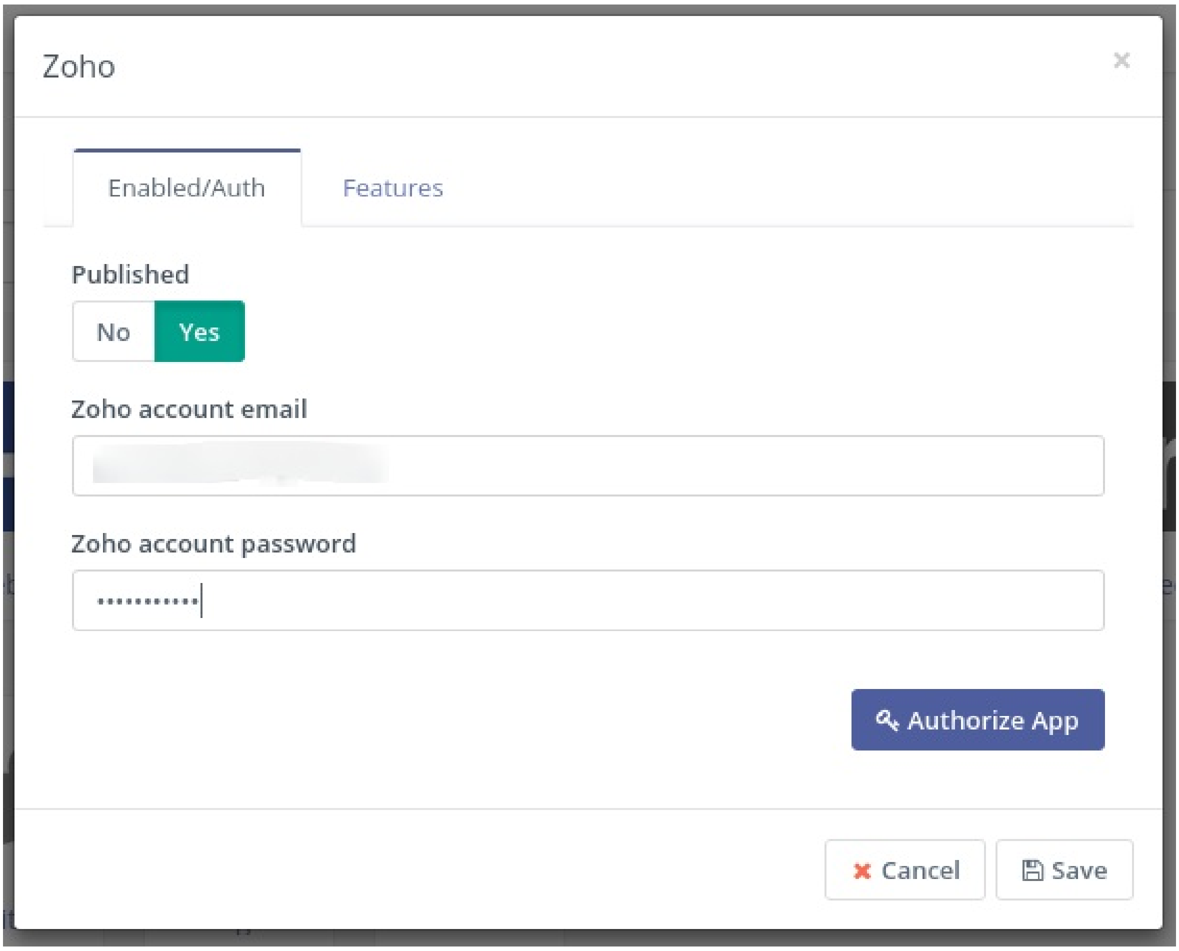
Configure the Zoho CRM plugin

1. Create a Zoho CRM account if you don't have one already.

2. Insert the email and password you created the Zoho account with into the Mautic Zoho integration plugin and Authorize it.

   If Zoho Two Factor Authentication is enabled, an Application Specific Password will need to be generated and used.

3. Set the *Publish* switch to *Yes*. Save.



4. In the *Features* tab select *Push contacts to this integration* checkbox.

   It is checked by default. If you uncheck it, the plugin will not push contacts to Zoho CRM any more.

5. Configure the field mapping.

6. Save the plugin configuration.

Test the plugin

Follow these steps to test the integration.

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

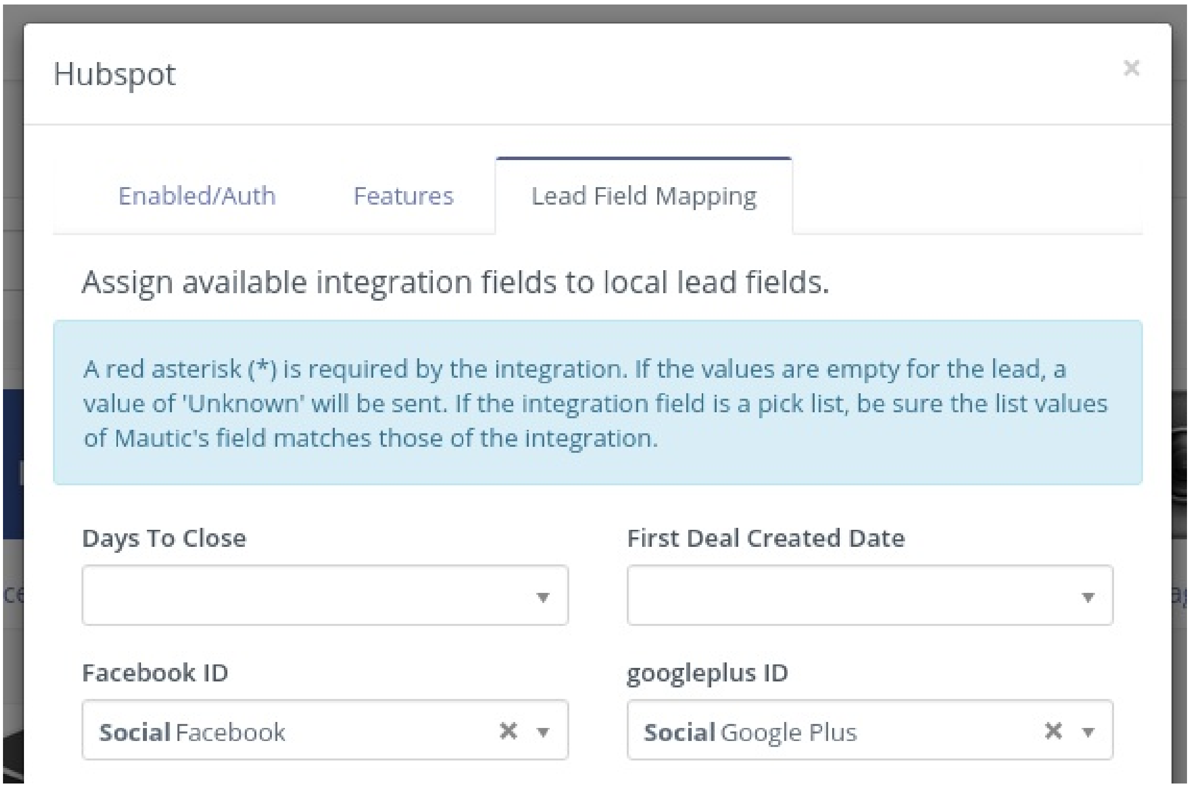
'firstName','lastName','maidenName','formattedName','headline','location','summary','specialties','positions','publicProfileUrl','emailAddress'

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.

> **Note**
>
> You don't have to map every field. Map only those you want to push into the integration.

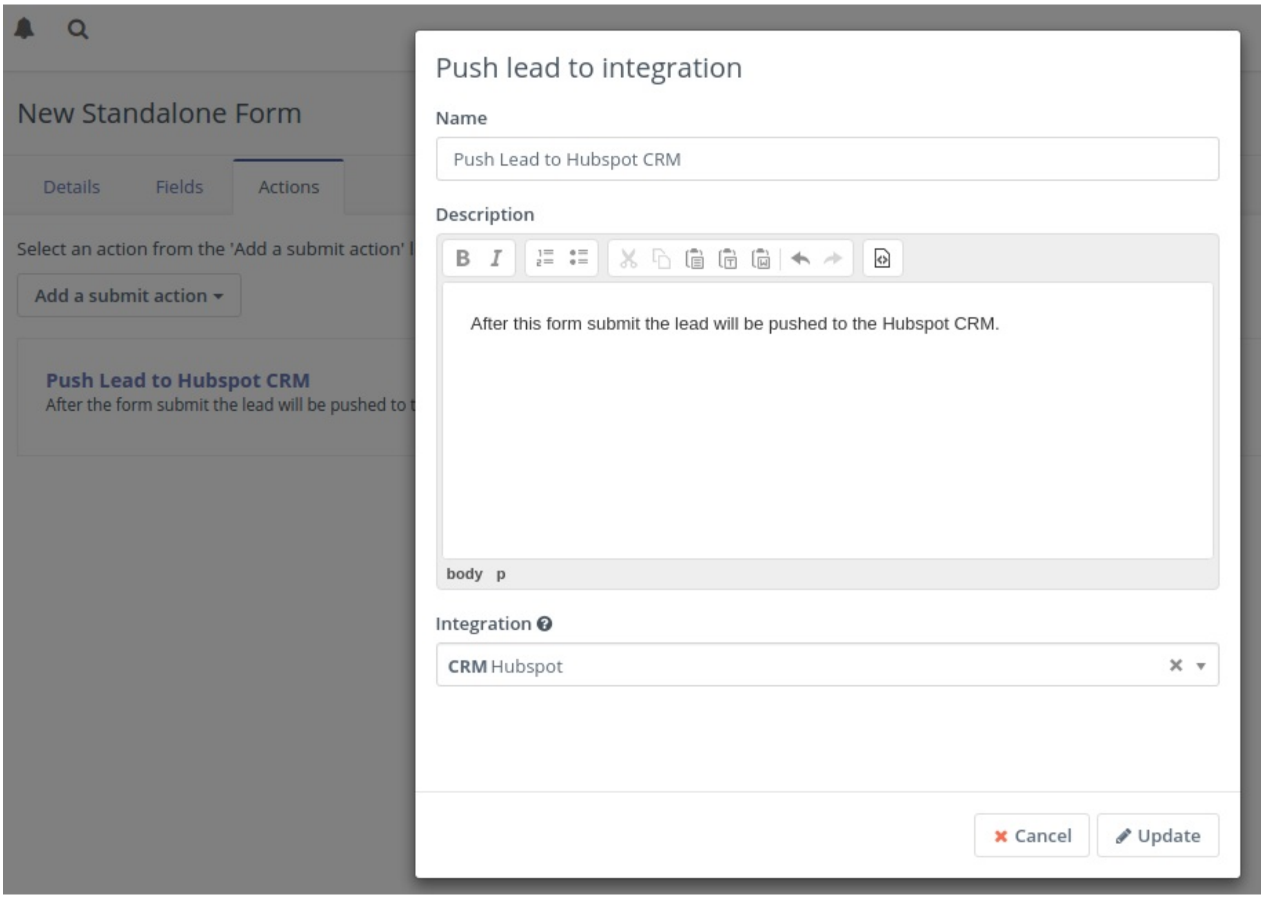


How to test an integration

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

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

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



1. Create a form with some fields

   (e.g. an `email` and a `firstname` field)

2. Add the *Push contact to integration* action

   (e.g. Hubspot CRM)

3. Browse to the form's public URL

   `https://example.com/form/[formID]`

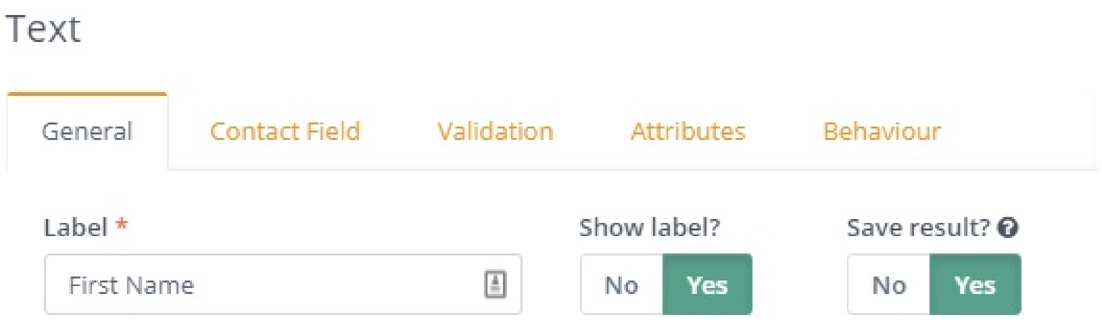
4. Fill in the fields with sample contact information and submit

5. Check the integration to see if the new contact was created

Troubleshooting

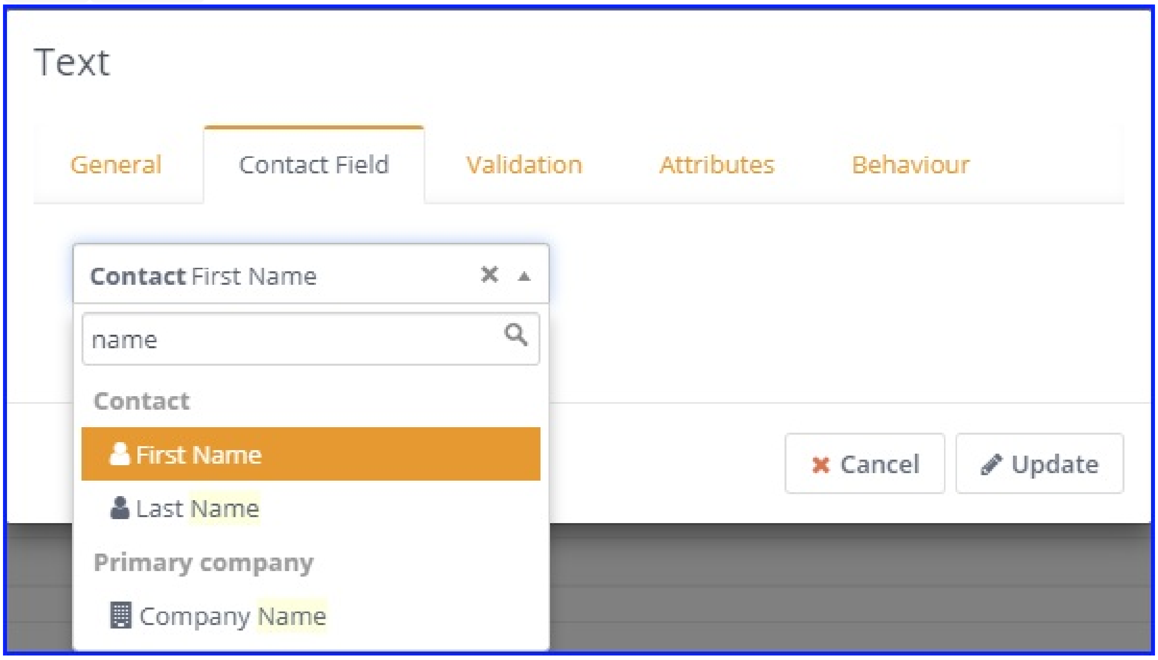
If the `firstname` value was not saved to the integration:

1. In the Form *General* configuration tab, confirm that the Form is configured to `Save result`.



2. In the Form *Contact Field* configuration tab, confirm the field is:

`Contact First Name`



3. Double check the Integration field mappings

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.

If you're new to Linux or Cron Jobs, then the Apache Foundation have an excellent guide which we would suggest that you read before asking questions via the various support channels.

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: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.

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.

Use ‘--gdpr’ flag to delete data to fulfill GDPR European regulation. This will delete leads that have been inactive for 3 years.

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. This command will send messages to contacts added to the source segments later, so if you don't want this to happen, set an unpublish date.

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

Command parameters:

- `--channel=email` what channel to execute. All channels will be sent if none provided all channels.
- `--id=X` is what ID of email, SMS or other entity to send.
- `--limit=X` is how many contacts are pulled from the database to be processed. 100 by default. So X contacts will receive their emails if this command is triggered. Next time the contact runs it will be next X contacts and so on.
- `--batch=X` is in how big batches will the emails be sent at once. This can be different for every provider. For example Mautic has API connection to Sparkpost. Such API can send 1000 emails per 1 call. So batch should be 1000 for fastest sending speed. Not more. But SMTP providers cannot handle 1000 at 1 time.
- `--min-contact-id` and `--max-contact-id` will allow to separate email sending by smaller chunks by contact ID ranges. If those ranges won't overlap this allows to run several broadcast commands in parallel.

Send Scheduled Reports

Starting with Mautic 2.12.0, it is now possible to use cron to send scheduled reports.

```
php /path/to/mautic/app/console mautic:reports:scheduler [--report=ID]
```

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.

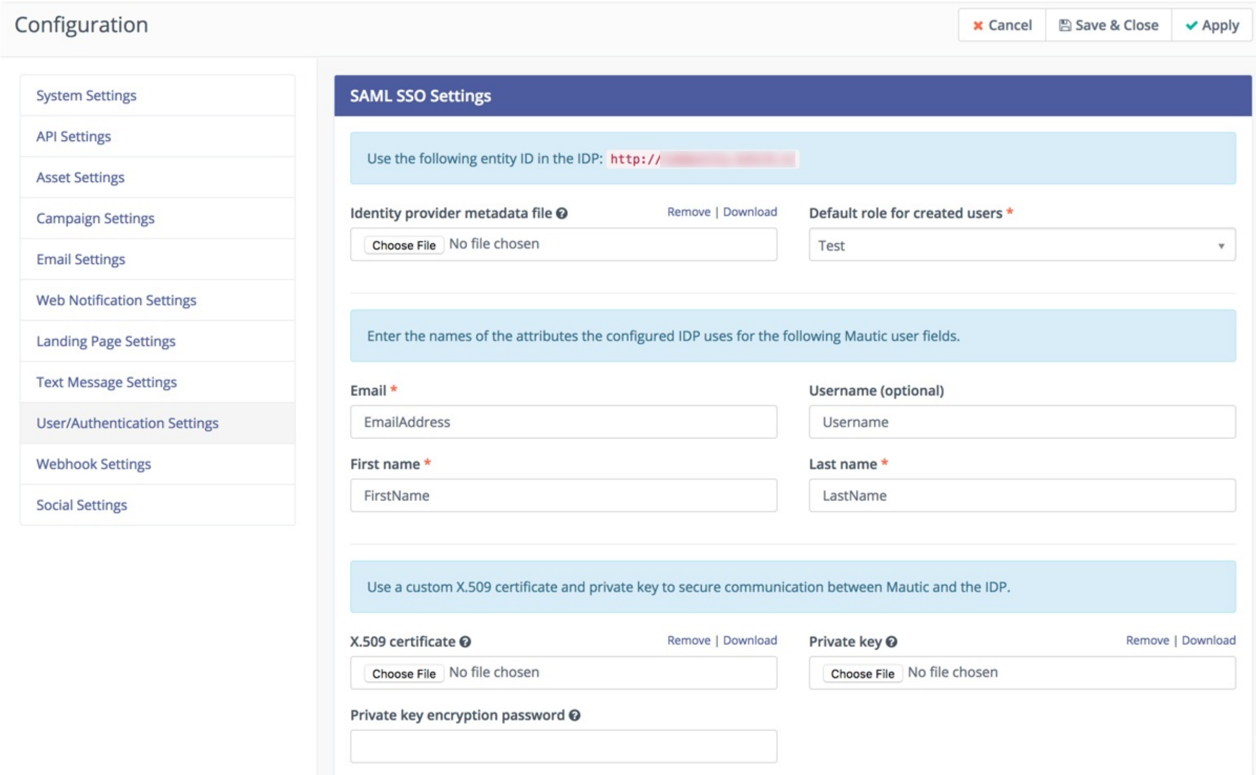
Logging In

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.

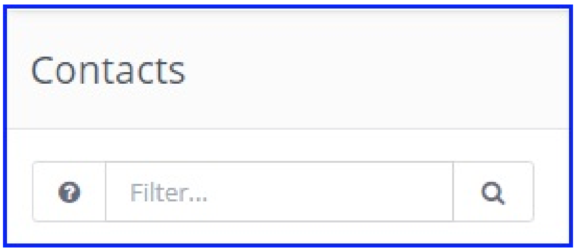
Disable SAML

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



Search operators and filters

Mautic allows you to use a range of search operators and filters to drill down into relevant resources. The available search filters and operators can be found next to the search input by clicking on the button with question mark. If such button is missing then there are no search filters available for that particular entity. Only hypertext search.



Mautic also has a "global search" feature. Click on the magnifying glass icon next to the Mautic logo/notifications icon on the top lefthand corner. It will open a search input and you can search through multiple different entities.

Search operators

The following search operators can be used:

- `+` (plus sign) - Search for the exact string (i.e. if admin, then administrator will not match)
- `!` (exclamation mark) - Not equals string
- `" "` (double quotes) - Search by phrase
- `( )` (parentheses) - Group expressions together.
- `OR` - By default the expressions will be joined as `AND` statements. Use the `OR` operator to change that.
- `%` - Use the `%` as a wildcard to search for specific names or values in a phrase (i.e. to find all companies with the word ‘Technologies’ then type `%technologies%`)

Search filters

The following search filters can be used:

Contacts

```
is:anonymous
is:unowned
is:mine
email:*
segment:{segment_alias}
name:*
company:*
owner:*
ip:*
ids:ID1,ID2 (comma separated IDs, no spaces)
common:{segment_alias} + {segment_alias} + ...
tag:*
stage:*
email_sent:EMAIL_ID
email_read:EMAIL_ID
```

```
email_queued:EMAIL_ID
email_pending:EMAIL_ID
```

Companies

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
category:{category alias}
```

Segments

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:global
name:*
```

Assets

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:mine
is:published
is:unpublished
name:*
is:uncategorized
category:{category alias}
```

Forms

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:mine
is:published
is:unpublished
has:results
name:*
is:uncategorized
category:{category alias}
```

Landing pages

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
is:prefcenter
category:{category alias}
lang:{lang code}
```

Dynamic Content

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
```

```
is:mine
is:uncategorized
is:prefcenter
category:{category alias}
lang:{lang code}
```

Emails

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
category:{category alias}
lang:{lang code}
```

Focus items

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
category:{category alias}
```

Manage actions

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
category:{category alias}
```

Manage triggers

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
category:{category alias}
```

Stages

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
category:{category alias}
```

Reports

```
ids:ID1,ID2 (comma separated IDs, no spaces)
```

```
is:published
is:unpublished
is:mine
```

Categories

ids:ID1,ID2 (comma separated IDs, no spaces) is:published is:unpublished

Users

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:admin
is:active
is:inactive
email:*
name:*
position:*
role:*
username:*
```

Roles

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:admin
name:*
```

Webhooks

```
ids:ID1,ID2 (comma separated IDs, no spaces)
is:published
is:unpublished
is:mine
is:uncategorized
is:prefcenter
category:{category alias}
lang:{lang code}
```

Queue

Improved scalability can be achieved by activating the queuing mechanism for email and page opens. Use this if you are getting too much traffic at once from people opening pages or opening emails.

Activating

You can activate and configure the queuing mechanism by going to configuration:

- Open the admin menu by clicking the cog icon in the top right corner.
- Select the *Configuration* menu item.
- Select the *Queue Settings* tab.
- Switch the *Queue Protocol* to either *RabbitMQ* or *Beanstalkd*.
- Save the configuration.

RabbitMQ

RabbitMQ is one of the available queue protocols that Mautic supports. In order to use it, you must have a RabbitMQ server running. Instructions on how to install RabbitMQ can be obtained on their website. For testing purposes, you can use you can use cloudamqp which offers a RabbitMQ as a service.

Once you have setup a RabbitMQ server, you can configure Mautic to use it by using the *Configuration* menu item again.

- Open the admin menu by clicking the cog icon in the top right corner.
- Select the *Configuration* menu item.
- Select the *Queue Settings* tab.
- Switch the *Queue Protocol* to *RabbitMQ*.
- Change the *Host* to the hostname of your RabbitMQ installation.
- Change the *Virtual Host* to the virtual host of your RabbitMQ installation.
- Change the *User* to the username of your RabbitMQ installation.
- Change the *Password* to the password of your RabbitMQ installation.
- Save the configuration.

Beanstalkd

Beanstalkd is another available queue protocol that Mautic supports. In order to use it, you must have a Beanstalkd server running. Instructions on how to install Beanstalkd can be obtained on their website.

Once you have setup a Beanstalkd server, you can configure mautic to use it by using the *Configuration* menu item again.

- Open the admin menu by clicking the cog icon in the top right corner.
- Select the *Configuration* menu item.
- Select the *Queue Settings* tab.
- Switch the *Queue Protocol* to *Beanstalkd*.
- Change the *Host* to the hostname of your Beanstalkd installation.
- Save the configuration.

Processing

Once the queuing mechanism is activated, any page hits and email opens will be queued up to be processed later. To process them, you will need to run some console commands on a regular basis.

Processing page hits is done by using the following command:

```
php /path/to/mautic/app/console mautic:queue:process --env=prod -i page_hit
```

Processing page hits is done by using the following command:

```
php /path/to/mautic/app/console mautic:queue:process --env=prod -i email_hit
```

When these commands are run, they will continue to run until you stop the program by using the keyboard combination `Control + C`. If you want to run them to process only, say, 50 page hits or email hits, you can run the command like this instead:

```
php /path/to/mautic/app/console mautic:queue:process --env=prod -i page_hit -m 50
```

or

```
php /path/to/mautic/app/console mautic:queue:process --env=prod -i email_hit -m 50
```

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

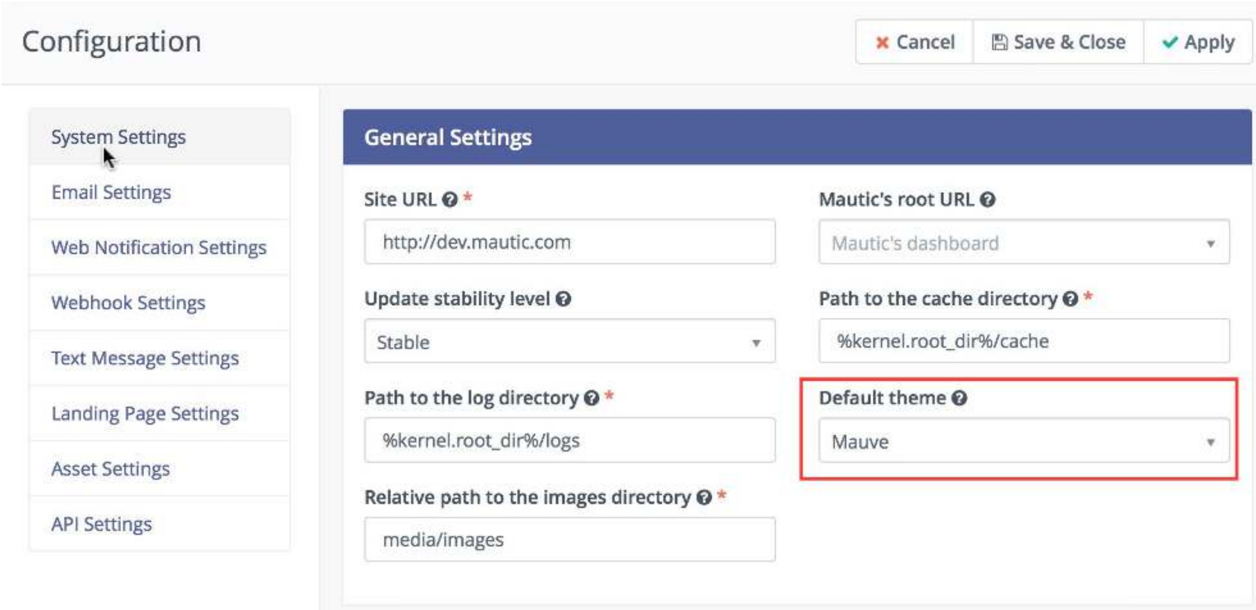
Go to the Theme Manager, check what theme(s) you want to delete and then click the red button above the theme table to delete them.

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

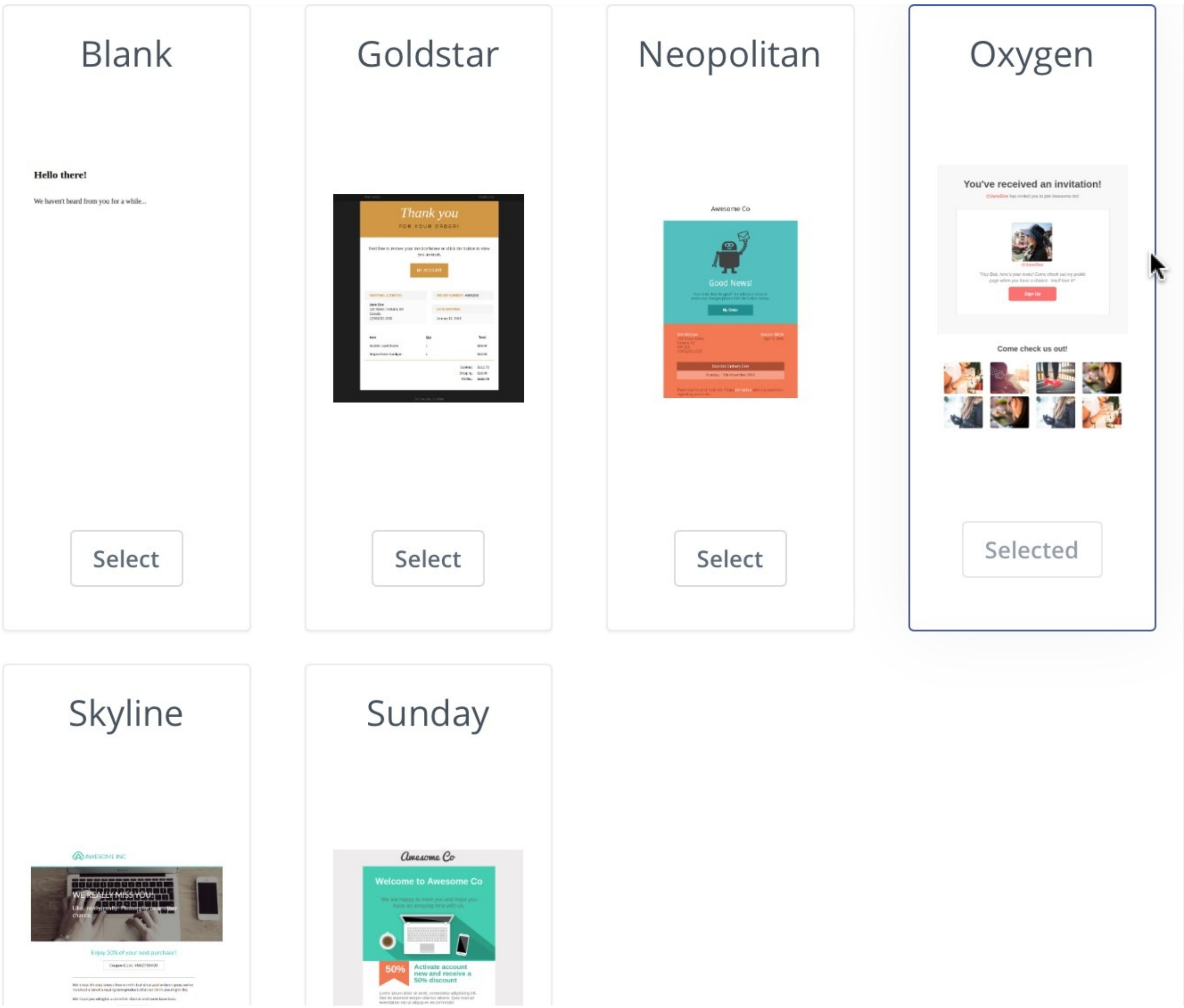
Assigning a default theme

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.

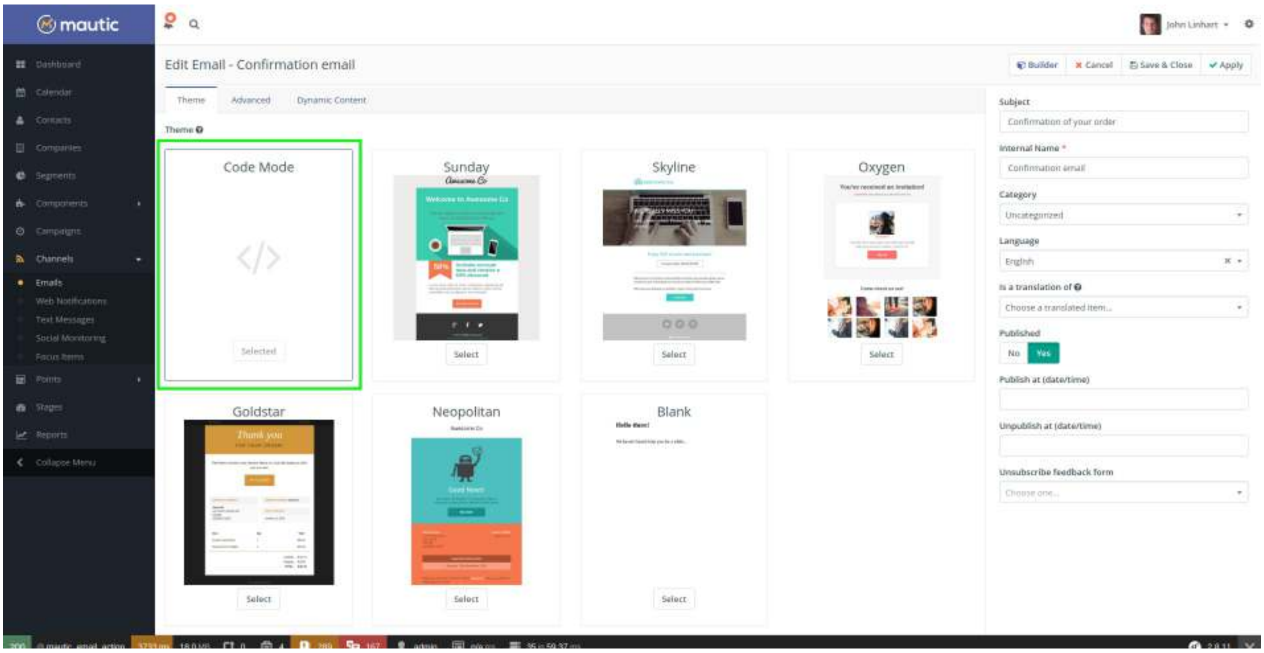
Code Mode was introduced in Mautic 2.3.0 and replaced the full page Froala (WYSIWYG) editor which manipulated the HTML code in some cases. Code Mode will not modify any of the code you paste in. The other option to edit a page/email content is to use the Builder. It uses Froala editor only to edit the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

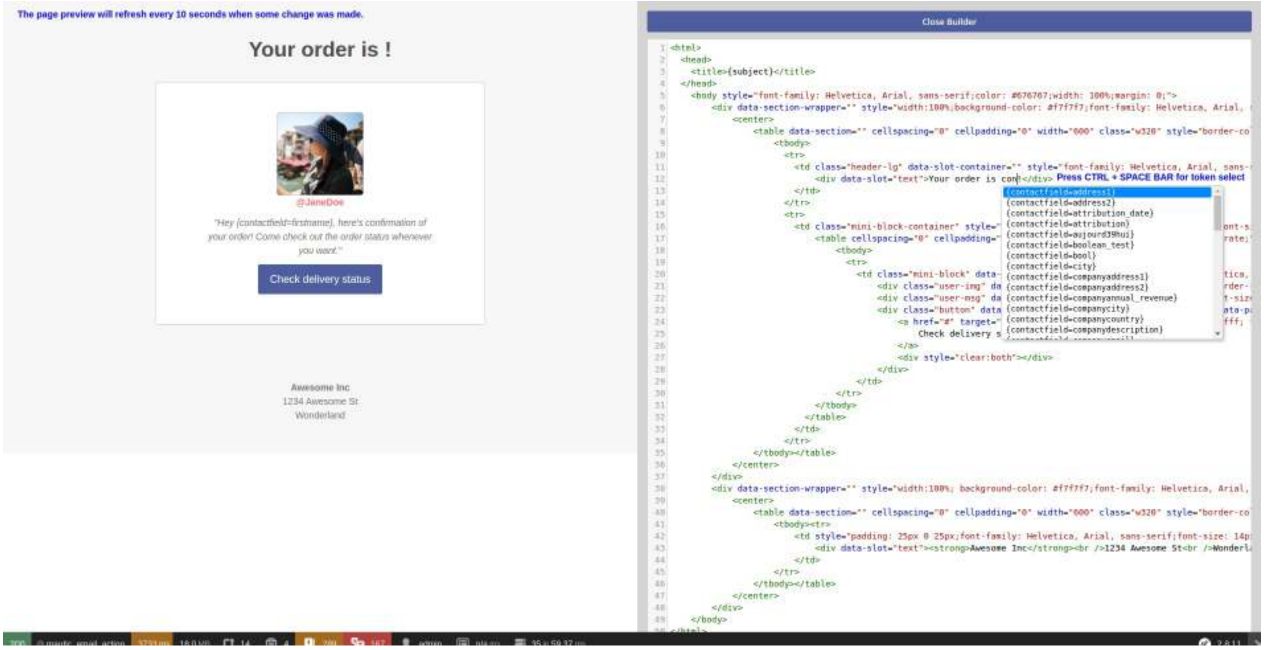


Edit the HTML content in the Code Mode Builder

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.

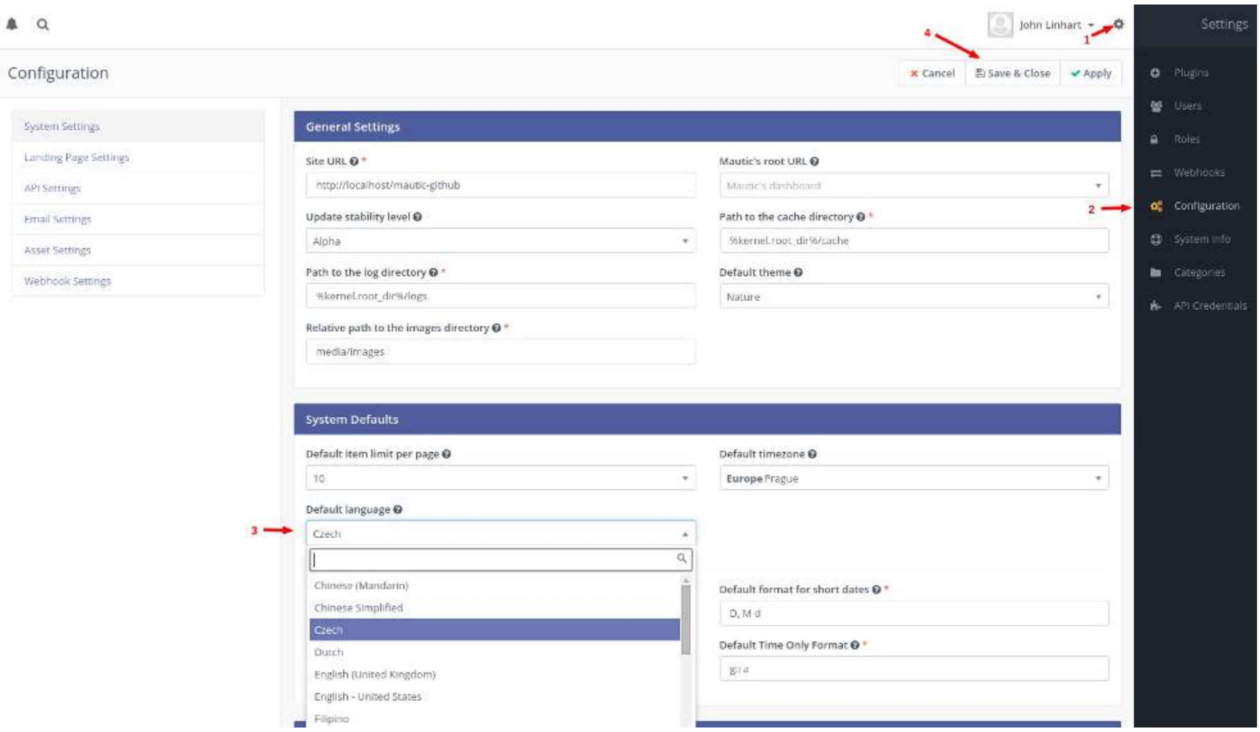
How to select a language in Mautic

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.

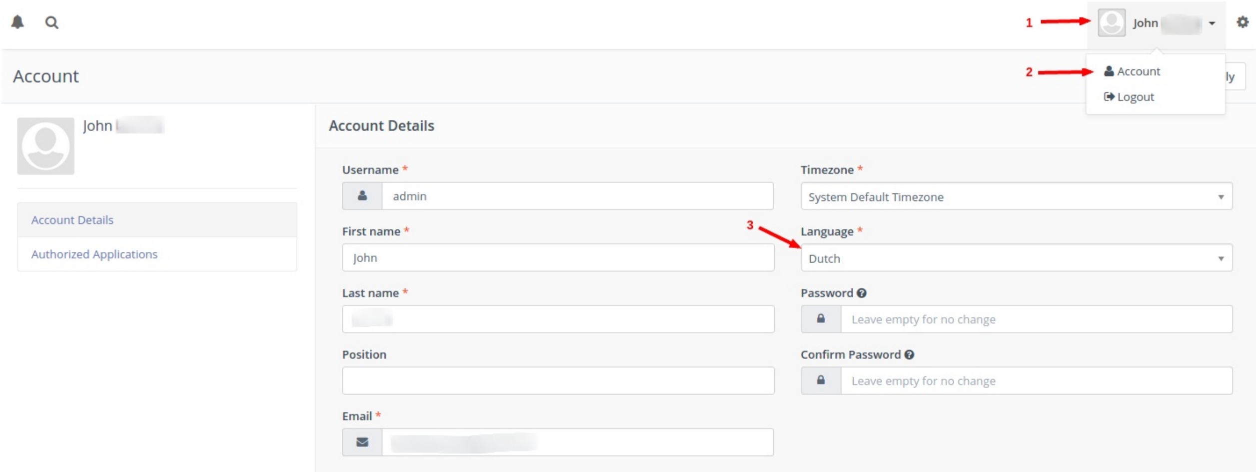
1. Open the right admin menu by clicking on the cog icon in the top right corner.
2. Select the *Configuration* menu item.
3. Select the default language.
4. Save the configuration.



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.

Tips & Tricks

Keyboard Shortcuts

Global Shortcuts

- shift+d: Load the Dashboard
- shift+c: Load Contacts
- shift+right: Activate Right Menu
- shift+n: Show Notifications
- shift+s: Global Search

Contact Pages

- a: Quick add a New Contact
- t: Activate Table View (also known as list view)
- c: Activate Card View (also known as grid view)

Display All Shortcuts

- shift+?: Displays all shortcuts in a modal window.

Configuration pannel

Max entity lock time tunning

In the system setting tab on the configuration panel, in Miscellaneous settings area, you can modify "Item max lock time". It is representing the time before an entity (email, form, etc.) locked by an user, is automatically released.

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 them 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.

Mautic update failed

Sometimes when updating Mautic, the process might stall or fail part way through. This can cause a problem, because it can cause Mautic to be in-between two versions and often this can make the system unusable.

The following processes can be followed to complete the upgrade manually.

Before you commence these steps, **please ensure that you have a tested backup of your Mautic instance**

Checking for schema updates

Mautic has a built-in tool which enables you to check the database and identify if there are any schema updates required. Visit your-mautic-url/s/update/schema to see if there are any updates required.

If this is not possible, or your Mautic instance is down completely, follow the next tips.

If you don't have SSH access, skip down to 'I don't have SSH access'.

I have SSH access

Having SSH access to your server makes things much easier. Log in via command line, and change directory to the location where Mautic is installed using the command

```
cd /your/mautic/directory
```

1. Try to clear the cache

When an upgrade attempt fails in the final step, it may be only the outdated cache that is causing a problem. Use the following command to clear it manually:

```
php app/console cache:clear
```

If this command throws a PHP error, you can try to remove the cache folder using the following command (be careful, this removes all files and folders in the path specified, so ensure you type it correctly!)

```
rm -rf app/cache
```

If clearing the cache has not resolved your problems, continue with the next step.

2. Trigger an update manually

The first step is to find out if there are any updates available using the following command:

```
php app/console mautic:update:find
```

The output from this command will tell you if there are any updates to apply. If there are, run the following command to apply them:

```
php app/console mautic:update:apply
```

If there are no updates found, proceed to the next step.

3. Check for outstanding database migrations

Run the following command to check for any outstanding database migrations:

```
php app/console doctrine:migration:status
```

If there are any reported, firstly **ensure that you have a tested backup of your database before proceeding, as this command will cause changes to the database**, then run:

```
php app/console doctrine:migration:migrate
```

4. Check for database schema updates

If your upgrade failed during the database update step, the database schema may not be up to date. Run the following command to check for updates:

```
php app/console doctrine:schema:update --dump-sql
```

Running this command will tell you whether the database is up to date with the code. If there are queries that need to be executed, **ensure you have a tested backup of your database before proceeding, as this command will cause changes to the database**, then run the following command:

```
php app/console doctrine:schema:update --force
```

If this hasn't resolved your problem, proceed to the next step.

5. Try to update the files manually

This step requires some manual intervention - there is no command for this part.

To update the files manually, you will have to:

1. Back up (download) all Mautic files from your server to your local computer, using FTP or the scp command which is much faster.
2. Delete all Mautic files and folders. Use FTP or the rm command (use the latter with extreme caution)
3. Download the latest Mautic package from https://www.mautic.org/download
4. Upload the zip package to the server, to the Mautic folder, using FTP or the scp command which is much faster.
5. Unzip the package with unzip 1.2.0.zip (change the filename to match the one you have uploaded). You can then remove the zip file using the command rm 1.2.0.zip
6. Upload app/config/local.php from your backup on your local machine to the fresh Mautic folder on the server (Mautic should now run)
7. Upload your custom data if you have some. Custom fields may be found in the following folders: media/files; plugins;

themes; translations

I don't have SSH access

There is a PHP script which can do almost all steps from the section above. You can find this script at https://gist.github.com/escopecz/9a1a0b10861941a457f4.

The description about how to use the script can be found below the script itself. There are some details you will need to do differently, so please read these instructions carefully. For example, you will need to use FTP to upload and download the files. You will have to unzip the files on your local computer and upload those files, which will take a lot longer.

There is a PHP error when I execute a command

The best thing to do is read the error, and search for the error in your preferred search engine. You can also search the Mautic Forums to see if others have reported and resolved the same problem.

Allowed memory size exhausted

This error will usually be reported as:

```
PHP Fatal error:  Allowed memory size of 67108864 bytes exhausted (tried to allocate 10924085 bytes) in ...
```

This means that the memory limit that Apache has available is too low. Edit the memory_limit in the php.ini configuration file.

A required PHP extension is missing

```
Fatal: Class 'ZipArchive' not found
```

This means that PHP cannot work with Zip packages - changes need to be made to your server configuration to allow unzipping of files at the command line. Ask your hosting provider, or search for a tutorial to help with this.

I need help

If you are stuck and need help, there are several places you can go to ask for assistance. Remember that most people who use the Community Forums, Chat and Github are volunteers.

If you think your configuration is causing the problem, ask on the Mautic Community Forums. Search before you post, as it is likely someone might have already answered your question in the past.

You can also chat with someone in the live Community Chat.

In all cases, it is important that you describe the problem, and all steps you have followed to resolve the problem, in detail. At a minimum, include the following:

- Steps to reproduce your problem - a step-by-step tutorial of how the problem arose, or how to reproduce it
- The PHP version of your server
- The error messages you are seeing - if you don't see the error message directly, search for it in the app/logs folder and in the server log. The server log can be found in different places depending on your setup. Ubuntu servers will generally have logs in /var/log/apache2/error.log. Sometimes your hosting provider might offer a GUI to view logs in

your Control Panel.

If you don't provide the information above as a minimum, the person who might try to help you will have to ask you for it, so please save them the trouble and provide the information upfront. Also, importantly, please be polite. Mautic is an Open Source project, and people are giving their free time to help you.

If you are sure that you have discovered a bug and you want to report it to developers, you can do so on Github

Mautic Command Line Interface (CLI) commands

Sometimes you may need to use the command line with Mautic. Here follows a list of the CLI commands that can be used.

You can find this list (and others - for example commands relating to Doctrine and other vendors) by typing

`app/console` ` at the command line in your Mautic directory.

Usage: command [options] [arguments]

Options: -h, --help Display this help message -q, --quiet Do not output any message -V, --version Display this application version --ansi Force ANSI output --no-ansi Disable ANSI output -n, --no-interaction Do not ask any interactive question -s, --shell Launch the shell. --process-isolation Launch commands from shell as a separate process. -e, --env=ENV The Environment name. [default: "prod"] --no-debug Switches off debug mode. -v|vv|vvv, --verbose Increase the verbosity of messages: 1 for normal output, 2 for more verbose output and 3 for debug

Mautic commands

These are the commands you may need to use in relation to your Mautic instance. They should be preceded by app/console.

Command	Description
mautic:assets:generate	Combines and minifies asset files from each bundle into single production files
mautic:broadcasts:send	Process contacts pending to receive a channel broadcast.
mautic:campaigns:execute	Execute specific scheduled events.
mautic:campaigns:messagequeue	Process sending of messages queue.
mautic:campaigns:messages	Process sending of messages queue.
mautic:campaigns:rebuild	Rebuild campaigns based on contact segments.
mautic:campaigns:trigger	Trigger timed events for published campaigns.
mautic:campaigns:update	Rebuild campaigns based on contact segments.
mautic:campaigns:validate	Validate if a contact has been inactive for a decision and execute events if so.
mautic:citrix:sync	Synchronizes registrant information from Citrix products
mautic:contacts:deduplicate	Merge contacts based on same unique identifiers
mautic:email:fetch	Fetch and process monitored email.
mautic:emails:send	Processes SwiftMail's mail queue
mautic:import	Imports data to Mautic
mautic:install:data	Installs Mautic with sample data
mautic:integration:fetchleads	Fetch leads from integration.
mautic:integration:pipedrive:fetch	Pulls the data from Pipedrive and sends it to Mautic
mautic:integration:pipedrive:push	Pushes the data from Mautic to Pipedrive

mautic:integration:pushactivity	Push lead activity to integration.
mautic:integration:pushleadactivity	Push lead activity to integration.
mautic:integration:synccontacts	Fetch leads from integration.
mautic:iplookup:download	Fetch remote datastores for IP lookup services that leverage local lookups
mautic:maintenance:cleanup	Updates the Mautic application
mautic:messages:send	Process sending of messages queue.
mautic:migrations:generate	Generate a blank migration class.
mautic:plugins:install	Installs, updates, enable and/or disable plugins.
mautic:plugins:reload	Installs, updates, enable and/or disable plugins.
mautic:plugins:update	Installs, updates, enable and/or disable plugins.
mautic:queue:process	Process queues
mautic:reports:scheduler	Processes scheduler for report's export
mautic:segments:check-builders	Compare output of query builders for given segments
mautic:segments:rebuild	Update contacts in smart segments based on new contact data.
mautic:segments:update	Update contacts in smart segments based on new contact data.
mautic:social:monitoring	Looks at the records of monitors and iterates through them.
mautic:theme:json-config	Converts theme config to JSON from PHP
mautic:unusedip:delete	Deletes IP addresses that are not used in any other database table
mautic:update:apply	Updates the Mautic application
mautic:update:find	Fetches updates for Mautic
mautic:webhooks:process	Process queued webhook payloads
social:monitor:twitter:hashtags	Looks at our monitoring records and finds hashtags
social:monitor:twitter:mentions	Searches for mentioned tweets

Variables

- Contact fields
- Company Contact fields
- Mautic Component tokens
- Email specific tokens
- Landing Page tokens
    - Preference Center Landing Page tokens
- Dynamic Web Content tokens
- Contact Monitoring
- Search filters
- Alphabetical list

> **ProTip**
>
> Default Value
>
> The default value can be specified after the `|` (pipe) character. Consider this email salutation:
>
> `Hi {contactfield=firstname|there},`

Contact fields

See managing custom fields for more information.

VARIABLE NAME	VARIABLE SYNTAX
Attribution	`{contactfield=attribution}`
Attribution Date	`{contactfield=attribution_date}`
Address Line 1	`{contactfield=address1}`
Address Line 2	`{contactfield=address2}`
Country	`{contactfield=country}`
City	`{contactfield=city}`
Company	`{contactfield=company}`
Email	`{contactfield=email}`
Facebook	`{contactfield=facebook}`
Fax	`{contactfield=fax}`
First Name	`{contactfield=firstname}`
Foursquare	`{contactfield=foursquare}`
Google+	`{contactfield=googleplus}`
Instagram	`{contactfield=instagram}`
IP Address	`{contactfield=ipAddress}`
Last Name	`{contactfield=lastname}`
LinkedIn	`{contactfield=linkedin}`
Mobile Number	`{contactfield=mobile}`

Phone Number	{contactfield=phone}
Position	{contactfield=position}
Skype	{contactfield=skype}
State	{contactfield=state}
Twitter	{contactfield=twitter}
Title	{contactfield=title}
Website	{contactfield=website}
Zip Code	{contactfield=zipcode}

Company Contact fields

See Companies for more information.

VARIABLE NAME	VARIABLE SYNTAX
Address Line 1 (Company)	{contactfield=companyaddress1}
Address Line 2 (Company)	{contactfield=companyaddress2}
Annual Revenue (Company)	{contactfield=companyannual_revenue}
City (Company)	{contactfield=companycity}
Country (Company)	{contactfield=companycountry}
Description (Company)	{contactfield=companydescription}
Email (Company)	{contactfield=companyemail}
Fax (Company)	{contactfield=companyfax}
Industry (Company)	{contactfield=companyindustry}
Name (Company)	{contactfield=companyname}
Number of Employees (Company)	{contactfield=companynumber_of_employees}
Phone Number (Company)	{contactfield=companyphone}
State (Company)	{contactfield=companystate}
Website (Company)	{contactfield=companywebsite}
Zip Code (Company)	{contactfield=companyzipcode}

Mautic Component tokens

See Components and Manage Pages for more information.

VARIABLE NAME	VARIABLE SYNTAX
Asset link for asset id#	{assetlink=25}
Focus Item id#	{focus=4}
Form id#	{form=83}
Landing Page link for page id#	{pagelink=17}

Email specific tokens

See Manage Emails for more information.

VARIABLE NAME	VARIABLE SYNTAX
Signature	`{signature}`
Subject	`{subject}`
Tracking pixel	`{tracking_pixel}`
Unsubscribe Text	`{unsubscribe_text}`
Unsubscribe URL	`{unsubscribe_url}`
Web View Text	`{webview_text}`
Web View URL	`{webview_url}`

Landing Page tokens

See Manage Pages for more information.

VARIABLE NAME	VARIABLE SYNTAX
Meta Description	`{pagemetadescription}`
Title	`{pagetitle}`
Language bar	`{langbar}`
Share Buttons	`{sharebuttons}`
Success Message	`{successmessage}`

Preference Center Landing Page tokens

See customizing preference center for more information.

VARIABLE NAME	VARIABLE SYNTAX
Lead Identifier	`{leadidentifier}`
Category List	`{categorylist}`
Segment List	`{segmentlist}`
Preferred Channel	`{preferredchannel}`
Channel Frequency	`{channelfrequency}`
Save Preferences	`{saveprefsbutton}`

Dynamic Web Content tokens

VARIABLE NAME	VARIABLE SYNTAX
[Dynamic Content 1] ie: user-defined variable name	`{dynamiccontent="Dynamic Content 1"}`

Contact Monitoring

See Contact Monitoring for more information.

VARIABLE NAME	VARIABLE SYNTAX
Language	`{language}`
~~Title~~	~~`{title}`~~
Page Title	`{page_title}`
~~URL~~	~~`{url}`~~
Page URL	`{page_url}`
Referrer	`{referrer}`
Tracking pixel	`{tracking_pixel}`
UTM Campaign	`{utm_campaign}`
UTM Content	`{utm_content}`
UTM Medium	`{utm_medium}`
UTM Source	`{utm_source}`
UTM Term	`{utm_term}`

Search filters

See the Search page for more information.

Alphabetical list

VARIABLE NAME	VARIABLE SYNTAX
Address Line 1	`{contactfield=address1}`
Address Line 1 (Company)	`{contactfield=companyaddress1}`
Address Line 2	`{contactfield=address2}`
Address Line 2 (Company)	`{contactfield=companyaddress2}`
Annual Revenue (Company)	`{contactfield=companyannual_revenue}`
Asset link for asset id#	`{assetlink=25}`
Attribution	`{contactfield=attribution}`
Attribution Date	`{contactfield=attribution_date}`
Category List (Preference Center)	`{categorylist}`
Channel Frequency (Preference Center)	`{channelfrequency}`
City	`{contactfield=city}`
City (Company)	`{contactfield=companycity}`
Country	`{contactfield=country}`
Country (Company)	`{contactfield=companycountry}`

Company	`{contactfield=company}`
Description (Company)	`{contactfield=companydescription}`
[Dynamic Content 1] ie: user-defined variable name	`{dynamiccontent="Dynamic Content 1"}`
Email	`{contactfield=email}`
Email (Company)	`{contactfield=companyemail}`
Facebook	`{contactfield=facebook}`
Fax	`{contactfield=fax}`
Focus Item id#	`{focus=4}`
Form id#	`{form=83}`
Fax (Company)	`{contactfield=companyfax}`
First Name	`{contactfield=firstname}`
Foursquare	`{contactfield=foursquare}`
Google+	`{contactfield=googleplus}`
Instagram	`{contactfield=instagram}`
Industry (Company)	`{contactfield=companyindustry}`
IP Address	`{contactfield=ipAddress}`
Landing Page link for page id#	`{pagelink=17}`
Language bar	`{langbar}`
Last Name	`{contactfield=lastname}`
Lead Identifier (Preference Center)	`{leadidentifier}`
LinkedIn	`{contactfield=linkedin}`
Meta Description (Landing Page)	`{pagemetadescription}`
Mobile Number	`{contactfield=mobile}`
Name (Company)	`{contactfield=companyname}`
Number of Employees (Company)	`{contactfield=companynumber_of_employees}`
Phone Number	`{contactfield=phone}`
Phone Number (Company)	`{contactfield=companyphone}`
Position	`{contactfield=position}`
Save Preferences (Preference Center)	`{saveprefsbutton}`
Segment List (Preference Center)	`{segmentlist}`
Signature	`{signature}`
Skype	`{contactfield=skype}`
State	`{contactfield=state}`
State (Company)	`{contactfield=companystate}`
Subject	`{subject}`
Twitter	`{contactfield=twitter}`
Preferred Channel (Preference Center)	`{preferredchannel}`

Share Buttons	{sharebuttons}
Success Message	{successmessage}
Title	{contactfield=title}
Title (Landing Page)	{pagetitle}
Unsubscribe Text	{unsubscribe_text}
Unsubscribe URL	{unsubscribe_url}
Website	{contactfield=website}
Website (Company)	{contactfield=companywebsite}
Web View Text	{webview_text}
Web View URL	{webview_url}
Zip Code	{contactfield=zipcode}
Zip Code (Company)	{contactfield=companyzipcode}