









Scoring is an on-line marketing technique that allows you to evaluate visitors of your websites. Visitors are represented by [contacts](#). Each score calculates a numeric value based on contact's properties or actions performed on websites.

You can set up scoring for your websites in the **Scoring** application. The initial page displays a list of scores defined for all sites.

<b>New score</b>			
≡	<u>Actions</u>	<u>Display name</u> ▲	<u>Status</u>
	 ...	Interested in smartphones	Enabled
	 ...	Repeated purchase	Enabled
	 ...	Salesforce replication score	Enabled

To manage existing scores, use the following basic actions:

- **Edit** () – opens the score's editing interface, where you can configure the score and view the points calculated for contacts.
- **Delete** () – deletes the score.

## Creating scores

1. In the **Scoring** application, click **New score**.
2. Enter a **Display name** and optionally a **Description** for the score.
3. Leave the **Enabled** check box selected.
  - You can temporarily stop the system from calculating the score for contacts by disabling this option.
4. (Optional) Use the **Send notification at score** and **Notification email address** fields to define whether the system should send a notification when a contact reaches a certain score.



### Modifying how notification emails are sent

- Administrators can modify the template of the notifications that the system sends in the **Email templates** application.
- Administrators can specify the sender email address in **Settings -> System** through the **Send email notifications from** setting.


5. Click **Save**.

New scores do not have any functionality by default. You need to create scoring rules to determine how the score calculates points for contacts.

## Defining scoring rules

Scores assign points to contacts according to a set of rules. Contacts that fulfill the conditions of the scoring rules either gain or lose points within the given score.

To add scoring rules to a score:

1. **Edit** () the score
2. Switch to the **Rules** tab.
3. Click **New rule**.
4. Enter a **Rule name**.
5. Set the rule's **Score value**.
  - This is the number of score points that the system assigns to contacts who fulfill the conditions of the scoring rule.
  - You can use both positive and negative values.
6. Select the **Rule type**:

- **Attribute** – rules based on the values of [contact](#) fields.
- **Activity** – rules based on [activities](#) performed by contacts on the websites.
- **Macro** – rules based on [macro conditions](#).

### Assigning score points based on contact attributes

If you choose the **Attribute** rule type, continue with the following rule settings:

1. Select which **Attribute** (contact field) the rule evaluates.
  - You can use both default and custom contact fields.
2. Configure the **Condition** for the field's value.
  - Select one of the comparison options and enter the required text or numeric value.
3. **Save** the rule.

The score applies the rule to all contacts whose value in the selected attribute meets the specified condition.

Save

### General

**Rule name:**\*

**Score value:**\*

**Rule type:**\* ☒ Attribute ☐ Activity ☐ Macro

### Rule settings

**Attribute:**

**Condition:**

### Assigning score points based on activities

If you choose the **Activity** rule type, continue with the following steps:

1. Select which **Activity** the rule monitors.
  - You can select both default and custom activities.
2. Specify any conditions that the details of the activity must fulfill.

Property	Description
Activity performed between	The score applies the rule only if the activity is logged within the defined time interval.
Activity value	The score applies the rule only if the activity's value fulfills the specified condition.  Only available for activities that have an associated value.

Page	<p>The score applies the rule only if the activity was logged on the selected page.</p> <p><b>Note:</b> The <i>Page</i> field is not available on "content only" sites (i.e. sites created using the <i>MVC Blank Site</i> template), where the content tree does not represent the structure of the actual website.</p>
Activity URL	<p>The score applies the rule only if the activity occurred on a page with a URL that fulfills the specified condition.</p> <p><b>Note:</b> If specifying the URL with the <i>Starts with</i> or <i>Equals</i> modifier, the URL must be absolute.</p>
Activity title	The score applies the rule only if the title of the activity fulfills the specified condition.
Activity comment	The score applies the rule only if the activity comment text fulfills the specified condition.
UTM Source	The score applies the rule only if the visitor who performed the activity arrived on the website from a source ( <i>utm_source</i> query string parameter value) matching the specified condition.
Campaign	The score applies the rule only if the visitor who performed the activity arrived on the website through a <b>campaign</b> with a name that matches the specified condition.
Culture	The score applies the rule only if the activity occurred on the selected language version of the website.
URL referrer	<p>The score applies the rule only if the URL referrer of the contact who performed the activity matches the specified condition.</p> <p>The referrer is the URL from which the contact arrived on the page where the activity occurred.</p>

### 3. Configure the following properties in the **Validity** section:

Property	Description
Recurring rule	<p>Indicates whether the rule applies to all occurrences of the activity.</p> <p>If checked, the score adds points to contacts for every activity that matches the rule. Otherwise only the first activity that matches the rule affects the contact's score.</p>
Max. rule points	The maximum number of points that contacts can receive as a result of the rule. This allows you to limit the effect of recurring rules.
Validity	<p>Determines how long the score points will be added to contacts after they perform the activity. After the specified time period, the system subtracts the rule points from the contact's total score.</p> <p>To set your activity rule's validity for an unlimited period of time, choose <b>Until</b> and leave an empty date and time value (or click <b>N/A</b>).</p>

### 4. **Save** the rule.

The score applies the rule to all contacts who have performed an activity that matches the specified conditions. If the rule is recurring, it can affect the score of contacts multiple times.

### Assigning score points based on macros

1. Specify the **condition** in the **Condition** field.
2. **Save** the rule.

### ✓ Using form data in score macro rules

You can create macro conditions that score visitors based on the information they [enter into form fields](#).

## Recalculating scores

If you add, remove or modify the rules of an existing score, you also need to recalculate the score points of contacts. Otherwise, the scoring data will not reflect the new rules.

You do **not** need to recalculate scores to refresh the point values according to the latest contact data of your websites (scores do this automatically).

To run the recalculation process:

1. Open the score's **Rules** tab.
2. Click **Recalculate**.
  - The recalculation dialog box opens.
3. Schedule the recalculation time:
  - **Now** – the recalculation starts immediately.
  - **Later** – set an exact date and time in the future.

### Planning recalculation for a future date

When you plan a score recalculation for a future date, the system automatically creates a [scheduled task](#), which runs the recalculation process at a required time. To see the recalculation tasks planned for your websites, navigate to the *Scheduled tasks* application -> *System tasks* tab. The tasks use names in format:

*Score '<score rule name>' recalculation*

4. Click **Save & Close**.

When the recalculation finishes, the system updates the score points of all contacts according to the current rules.


### ✓ Recalculation performance

- You can **significantly improve scoring recalculation performance** by [implementing a data query translation](#) of your custom macro rules.
- Do not run the recalculation **during the peak traffic hours** of live websites. Score recalculation can be a resource intensive process that may reduce the website performance.
- Recalculation resends all [email notifications](#) set up for the score (if contacts achieve the required number of score points after the recalculation).

## Setting up email notifications for scores


You can configure scores to send email notifications when contacts reach a certain number of score points. This allows you to automatically distribute information about interesting contacts. For example, you can set up email notifications for scores that indicate when contacts are likely to become customers.

**Prerequisites:** You must have an [SMTP server](#) configured for your websites.


1. **Edit** () the score and open the **General** tab.
2. Type the minimum number of score points into the **Send notification at score** field.
3. Enter the target address for the notification emails into the **Notification email address** field.
  - To specify more than one recipient, add multiple addresses separated by semicolons (;).

- Your administrator can set the sender email address in **Settings -> System** through the **Send email notifications from** setting.
4. **Save** the score.

Whenever a contact reaches the specified number of points in the score, the system sends a notification email to the target addresses.

 **Tip:** Your administrator can modify the content of the notification by editing the **Scoring - Notification email** template in the **Email templates** application.

## Monitoring the scores of contacts

To view the scoring results for your websites, **edit** () a particular score and open the **Contacts** tab. Here, you can find a list of all [contacts](#) that have points in the given score. The filter above the list allows you to view only the contacts whose score value matches certain criteria.











**Note:** You may notice a delay in the points calculated for scores with [activity rules](#). It takes up to several minutes before the system updates the score points for the performed activities.

Score:

Is greater than or equal ▼

5

Search


<input checked="" type="checkbox"/>	≡	Actions	First name	Last name	Status	Score ▲
<input checked="" type="checkbox"/>		 	louise	wright		5
<input checked="" type="checkbox"/>		 	russell	collins		5
<input checked="" type="checkbox"/>		 	bryan	anderson		5
<input checked="" type="checkbox"/>		 	abigail	clark		5
<input checked="" type="checkbox"/>		 	andrea	romero		5

Selected contacts ▼

Add to contact group ▼

OK

### Managing contacts from the score overview

Clicking **View contact details** () opens the given contact's editing interface. This allows you to view the details of the contact and modify its properties.

When evaluating the scores of contacts, you can manually add contacts to a [contact group](#) or change their [status](#):

1. Choose which contacts to manage:
  - a. *Selected contacts* - mark contacts using the checkboxes next to the list.
  - b. *All contacts*
2. Select the *Add to contact group* or *Change status* action.
3. Click **OK**.

You can also **View score details** (🔍) for each of the contacts. This opens a separate dialog that shows exactly which scoring rules contributed to the contact's total points in the given score. You can view the following data for all relevant scoring rules:

- **Rule value** – this is the value set in the rule's definition. The system adds this number to the contact's score every time the score meets the rule criteria.
- **Quantity** – shows how many times the **Rule value** has been added to the contact's score.
- **Total value** – the total score calculated by multiplying the previous two values.

☰ <u>Scoring rule</u> ▲	<u>Score value</u>	<u>Quantity</u>	<u>Total value</u>
Works as a Manager	5	1	5

✓ **Tip:** To view all scoring data for a specific contact, switch to the **Contacts** section and **view contact details** (🔍) of the given contact. On the **Profile** tab, you can see all scores where the contact has points.