Subscribers

Empower your engagement strategy with SmartEngage Subscribers. Efficiently manage tags, create custom tags, and harness the power of custom fields to optimize your subscriber data for targeted and impactful campaigns.

Subscriber Page Overview Video

https://player.vimeo.com/video/285368837

Understanding Tags

SmartEngage uses two types of tags.

1. User Tags - These start with a hashtag # and are assigned by you or during some sort of automation or Lead Magnet acquisition. Subscribers can have multiple tags assigned to them in order to help you stay organized.

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2. Conversion Tags - These start with a dollar sign $ and are automatically assigned to any subscirber that triggers a conversion. These tags will appear Green in most locations of the SmartEngage interface.

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NOTE: There are not "lists" on SmartEngage as you might be used to with other Autresponders in the past. We found the feature to be redudant if the use of tags are properly implemented.

Understanding Custom Fields

Custom Fields allow you to store valuable information about your subscribers. For example, within our Facebook Messenger chatbot you ask the subscriber's type of business, receive a reply, and store it as a custom field for "Business Type".

In order to create and manage your custom fields just follow these steps:

Step 1: Click on your brand avatar and then click "Manage / Integrate"

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Step 2: On the left navigtion menu area click on "Custom Fields"

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Step 3: Click the button for "Create New Custom Field"

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Step 4: Enter a Name and select the type of data it will be depending if it will be text based, a number, date, etc.

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Once you are satisified with your selections, click on Create.

A list of your Custom Fields will be listed on the main page in two sections. One for currently active Custom Fields, and another for Archived Custom Fields which you are not actively using.

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Now it's time to get creative and build some Facebook Messenger Chatbots which ask the user for inputs which will be stored as a custom field.

Using Filters

Filters allow for setting conditions for which will then display the subscribers based on your selections.

The timeframe filter is the first one to take note of.

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The default option is Lifetime, which will show all of your subscribers, but you are welcome to select another timeframe preset depending on your needs.

The next option we will cover is extremely powerful and allows you to set conditinal filters for sorting and displaying your subscribers. Click on "Filter" and you will then see the "Conditions" box appear underneath it.

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You can now click on the Conditions box in order to display all the possible filters.

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You can make multiple filter selections which will display to show you which filters you have set thus far.

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Above these filters you will also see the option to set how these Filters are joined.

-They can either be joined using "all of these conditions", which means that all of the selected filters must apply for the Subscribers to be displayed below.

-They can also be joined using "any of these conditions", which means that each filter works independently of the others and will show subscribers as long as any of the selected filters apply.

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Using Bulk Actions (Tags, Calculating LTV, Exporting, etc)

Bulk Actions are a great way run tasks for your Subscribers. Have a certain #tag or automation sequence you want to bulk assign? This is where you do that.

Step 1: Visit your Subscriber's page

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Step 2: Now that you are on your Subscriber's page go ahead and set any Filters, Searches, and date ranges to narrow the list of Subscriber's according to your needs.

Step 3: In the top right area you will see the # of filtered subscribers based on your criteria. You can now click on "Select all" to select all the subscribers which match that criteria.

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Step 4: Click on the button for "Bulk Actions"

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At this point you can select the type of action you wish to conduct.

Add Tag - Adds the tag you select to all the selected subscribers.

Remove Tag - Removes the tag you select from all the selected subscribers.

Add to Sequence - Will add the selected subscribers to any Sequences you have created

Remove from Sequence - Will remove the selected subscribers from any Sequences you have created.

Calculate Conversion Value - When selected you will then have to select a date range to retrieve the conversion data. This calculation will take the Total $ of conversions and divide it by the # of subscribers selected in order to give you your Life Time Value (LTV).

Export - Will download a list of the selected subscribers in CSV format

Delete - Will warn you and then delete your selected subscribers.

Adding a New Subscriber Manually

Adding a new subscriber is the process of manually adding contact details for a person with an email address.

Step 1: Visit your Subscribers page

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Step 2: Click the button at the top for "New Subscriber"

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Step 3: On the popup screen you will be able to enter the contact details for this user. You are required to enter a name and email address at a minimum. The other fields are optional.

Step 4: Confirm that the subscriber gave you permission to email them and click the "Submit" Button to add this user.

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Importing Emails

Importing Email Subscribers is done as follows.

***NOTE:** If you already know you have Custom Fields you want to import from a previous Email Service Provider please first Add Custom fields by following the instructions provided here:

Understanding Tags

Step 1: On your left navigation menu click on Subscribers.

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Step 2: At the top middle area of your screen click the button for "Import Subscribers".

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Step 3: Select Emails as the platform you wish to import and add the CSV file for your email users that you downloaded from your previous service provider. Click Continue

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Step 4: You will then see a screen like below for Mapping Columns. The left hand column are all the fields we found from your .CSV file. The right side column with dropdowns are the fileds which SmartEngage has available. We automatically match these as best as we can but feel free to review this before clicking "next".

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Step 5: Review the selected column mapping you selected and then click "Submit"

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NOTE: After clicking Submit you will then see a confirmation message that we are importing your Contacts.

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SmartEngage uses the most sophisticated email cleaning system available on the internet. This results in the cleanest list possible which, in turn, gives you amazing

open rates.

Please be patient as importing can take a couple of hours to complete. You can close out the screen and continue on other parts of the site if you wish at that time.

Importing Facebook Messenger Users from another platform

Step 1: Setup your SmartEngage avatar and ensure your Facebook page is connected (Automatic process during avatar creation)

Step 2: Log into your old Facebook Messenger software and prepare to send out a broadcast newsletter that asks a question and/or provides a quick reply. (The goal is to get them to interact back in some way).

Step 3: Prepare to send approximately 2 of these broadcasts over the course of about a week using your old Facebook Messenger software.

Step 4: You will see that as soon as someone replies or clicks the quick reply button from your broadcast in the other software they are automatically inserted as a Facebook Messenger Subscriber within SmartEngage.

Step 5: Deactivate your old bot platform and continue to engage with your Facebook Messenger subscribers exclusively through SmartEngage.

NOTE: You may lose some subscribers during this process due to some people not replying or clicking any quick replies from your broadcast message via your old software provider. This is expected and is nothing to be concerned with since the ones not replying/interacting are most likely not going to have good engagement anyway.

Importing Push Notification Subscribers

Importing Push Notification Subscribers is done as follows.

Step 1: On your left navigation menu click on Subscribers.

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Step 2: At the top middle area of your screen click the button for "Import Subscribers"

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Step 3: Select Push Notification as the platform you wish to import and add the CSV file for your push notification users that you downloaded from your previous service provider. Click Continue

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Step 4: Map Columns - Verify the fields are matched up properly. (In most cases we automatically match these with high accuracy but it's good practice to verify.

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NOTE: It is good practice to select an existing Tag or to enter a new tag to segment this newly imported list.

Step 5: Verify the # of subscribers which are being imported and click submit

Blacklist (Suppression List)

The blacklist is a list of email addresses that are prevented from receiving broadcasts and automation emails from you.

In order to add or remove emails from this list just follow the instructions below.

Step 1: Click on your avatar and then click on "**Manage / Integrate**"

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Step 2: On the left navigation panel click on "**Email Blacklist**"

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Step 3: Here you can click on "Add Email Blacklist" or "Import Email Blacklist"

- When choosing the former you simply have to paste a line item list or comma separated list (up to 1,000 emails at a time).
- When choosing the latter you simply have to upload a .txt file of email addresses in line item format (up to 1,000 per import).

NOTE: You can also edit an existing email on your blacklist by clicking the pencil icon or remove them entirely by clicking the delete icon.

Linking Subscribers Across Platforms

A big part of what SmartEngage is great at is attributing different platforms to one specific Subscriber. This is done using a variety of methods which include cookie tracking, URL tracking, Javascript, IP tracking, and some other proprietary methods.

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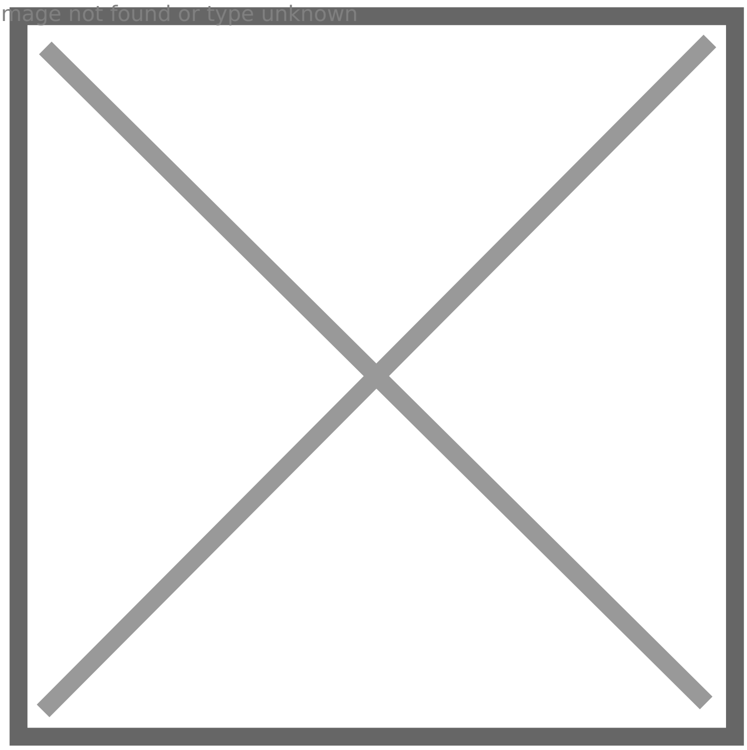

We also encourage you to do your part in linking alternative platforms to your subscribers by sending incentivized communication messages.

For example: If you have a list of Subscribers where you only have their email address you might send them a broadcast with a link that takes them to your Facebook Messenger Messenger Ref URL where they can download a free gift.

What Happens if My # of Subscribers Exceeds My Account Plan?

In order to provide a streamlined user experience SmartEngage will always automatically upgrade your account so that you can be within your plan limits.

If your account's # of Subscribers were to exceed its limits by one or more of the following:

- Lead Magnets
- Manually Adding Subscribers
- Importing Subscribers

Then, SmartEngage will automatically upgrade you to the next package available.

If your account is already a PRO account (5,500 Subscribers) or higher then you will be Auto Upgraded to a High Volume Account with a 1,000 Subscriber Buffer.

Example 1: Bob has 2,400 subscribers on his BASIC account which allows for a maximum of 2,500 subscribers. Bob imports another 500 subscribers and his account total for subscribers increased from 2,400 to 2,900. As a result, his account was automatically upgraded to the PRO plan which allows for 5,500 subscribers.

Example 2: John has 5,400 subscribers on his PRO plan which allows for a maximum of 5,500 subscribers. John's Lead magnets this week brought in another 150 new subscribers and his account total for subscribers increased from 5,400 to 5,550. As a result, his account was automatically upgraded to the HIGH VOLUME plan once it reached 5,501 subscribers. His new plan was automatically setup with an overage of 1,000 subscribers as a buffer, which resulted in his High Volume plan being configured at 6,500 subscribers.

Example 3: Carol is already on the High Volume Plan. This particular plan is setup for 25,000 subscribers. Carol imports another 5,000 subscribers today which brings her total subscribers to 30,000. As a result, her plan is automatically upgraded to 31,000 contacts, because of the automatic 1,000 subscriber buffer.

NOTE: You can always manually upgrade to a larger plan whenever you see fit regardless of the # of subscribers you currently have, by visiting your billing area here: VIEW BILLING