



User Manual

2025



About InFact CMS

With InFact's customizable and Drag & Drop CMS solution, you are one step into the future. It is no longer necessary to be able to program and code to build mobile sites. We have done the development and design of your mobile site. You can use them to gather members data, inform customers about coupons and services and send our surveys.

It doesn't get more professional than this!

With InFact's unique CMS solution, you can create beautiful image galleries in 1-2-3, add logos, images, videos, maps, news, surveys and much more.

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Log in

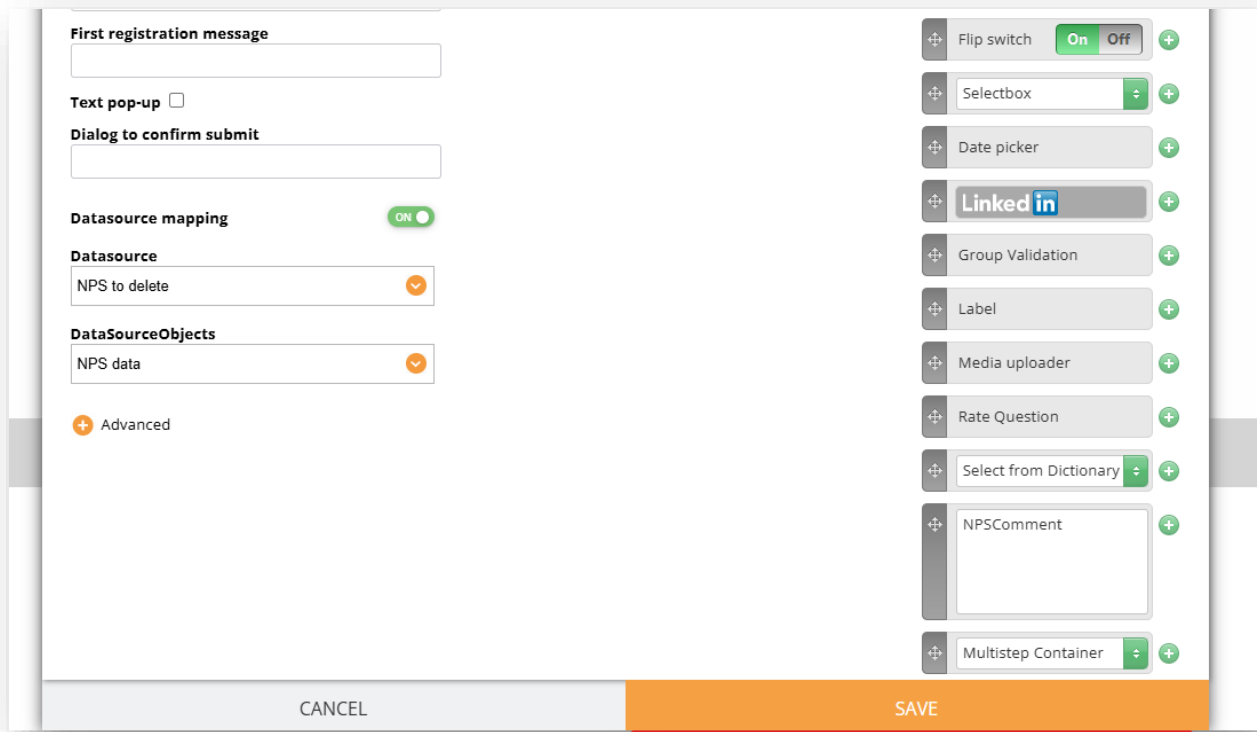
When you want to make changes to your mobile landing page, campaign or survey, first click on the link to the CMS solution and enter the Login and Password that you have received by email.

<https://www.infact.no/mmww/Admin/CustomerPage.aspx>



Remember to save your work

It is important to save often. This way you avoid losing work you have done. The CMS is sensitive and if you make a mistake with, for example, an image in an image holder, you will exit the page you are working on, and all unsaved work will be lost. Therefore, make it a good habit to save often.

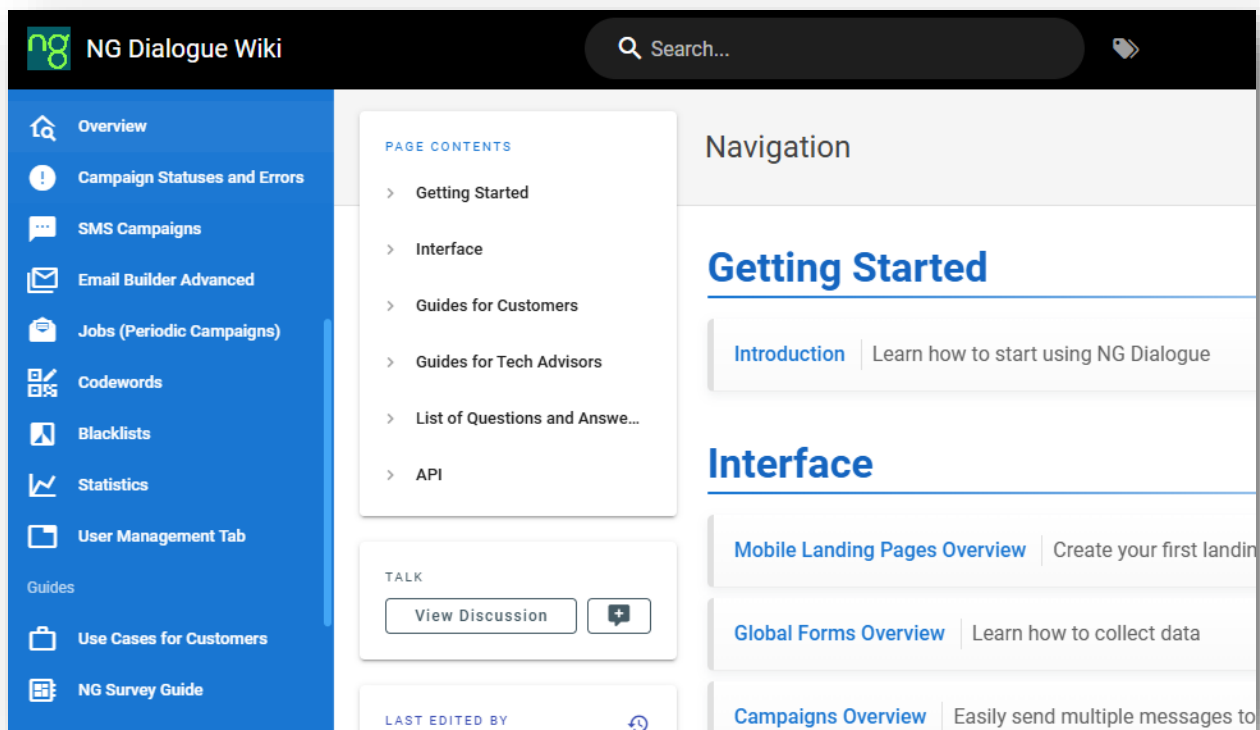


InFact Wiki

If you need more detailed information or case-related articles, you can look up the information on our wiki. The link: <https://wiki.infact.no/>

To enter, you must be logged in onto the main platform.

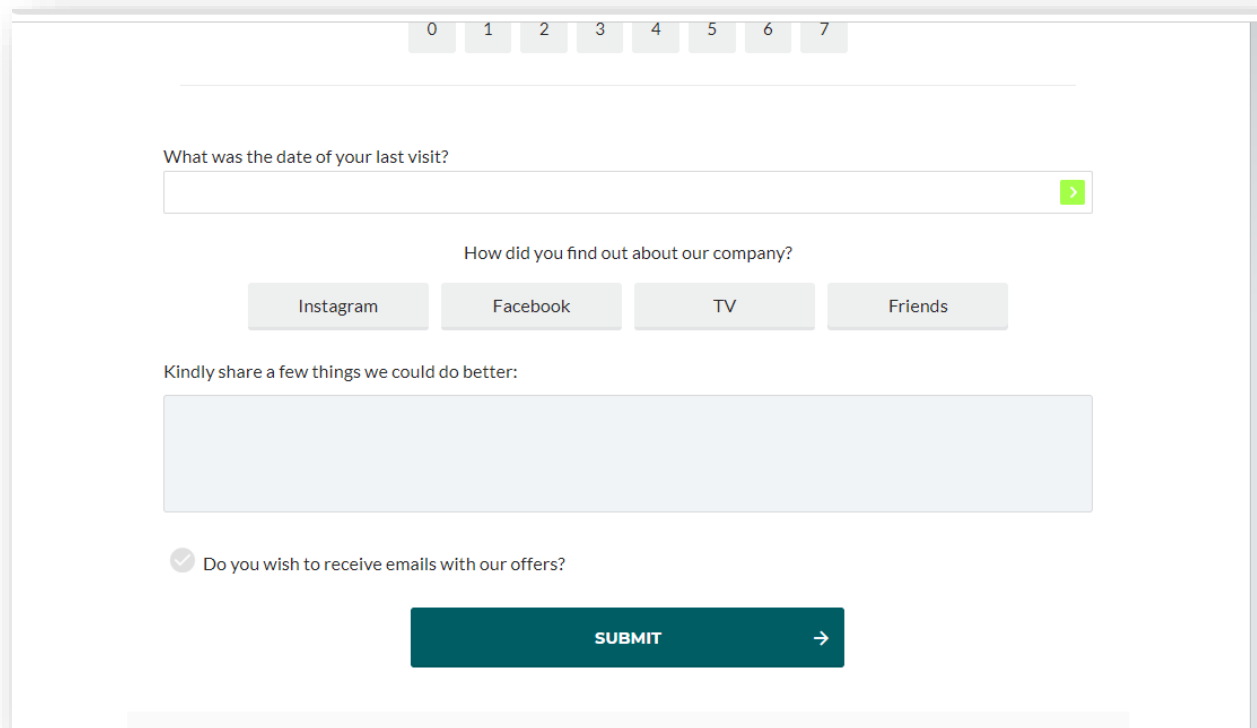
Also, this manual includes some links to the more detailed tutorials and guides you can follow on.



Create New Landing Page

You can always create a new landing page, but you do not need to prepare it from scratch, the designer prepares a template for your use. This article just explains how to work with landing pages.

In digital marketing, a **landing page** is a standalone web page (site), created specifically for a marketing or advertising campaign. It's where a visitor "lands" after they click on a link in an email, or ads from Google, Bing, YouTube, Facebook, Instagram, Twitter, or similar places on the web. At InFact, we can create landing pages with Surveys for your customers to provide feedback.



0 1 2 3 4 5 6 7

What was the date of your last visit?

How did you find out about our company?

Instagram Facebook TV Friends

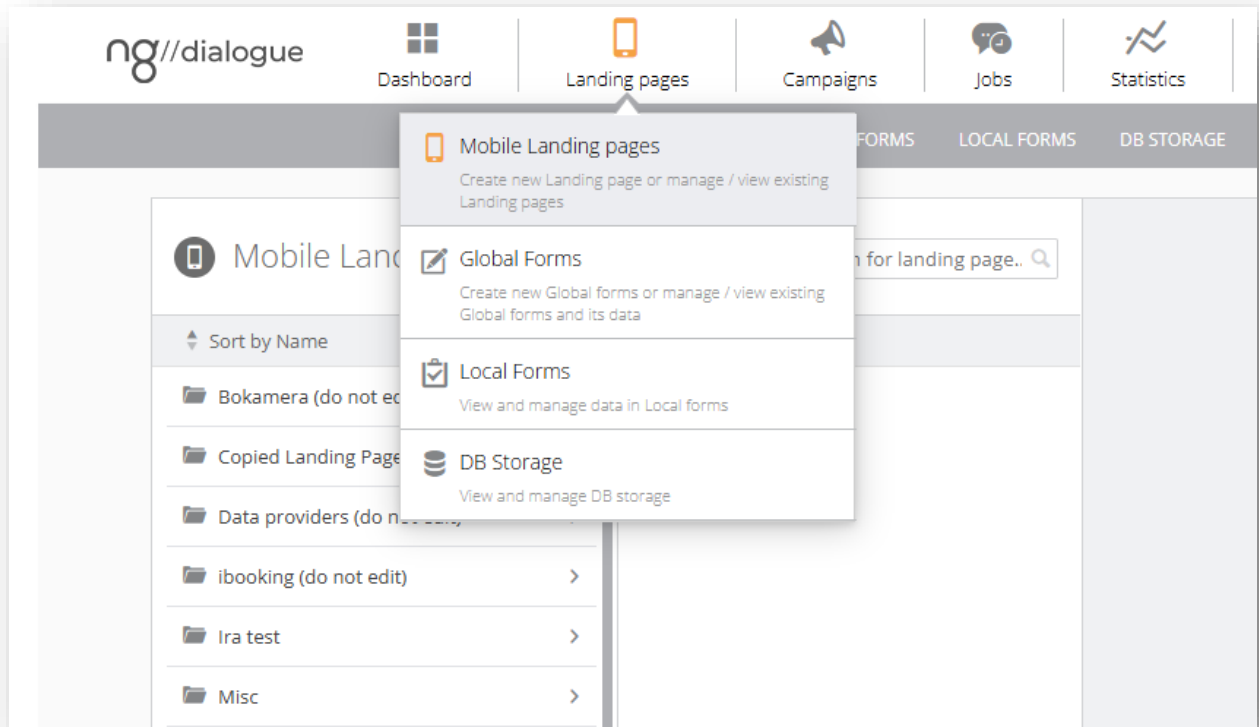
Kindly share a few things we could do better:

Do you wish to receive emails with our offers?

SUBMIT →

Steps to Create Landing Page

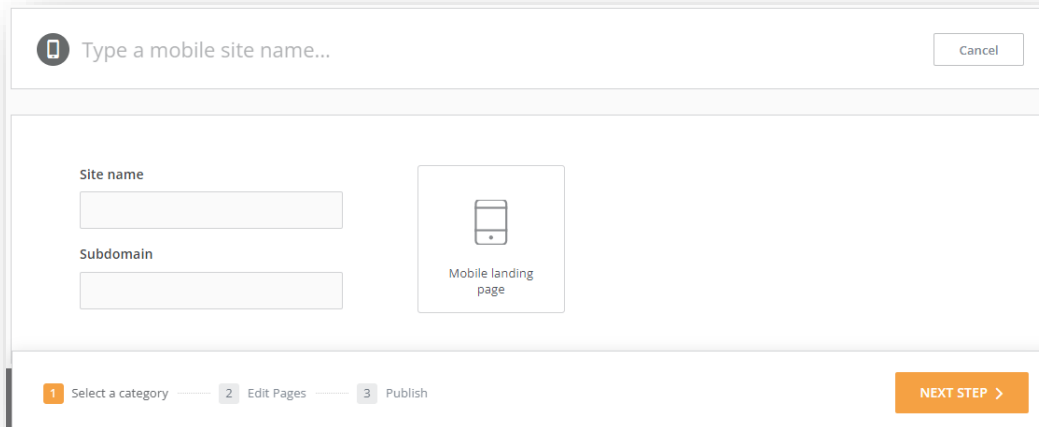
In order to create a new mobile landing page, you need to go to the "Landing page" - "Mobile landing page" section and select either an existing folder or create a new folder using the "New folder" button.



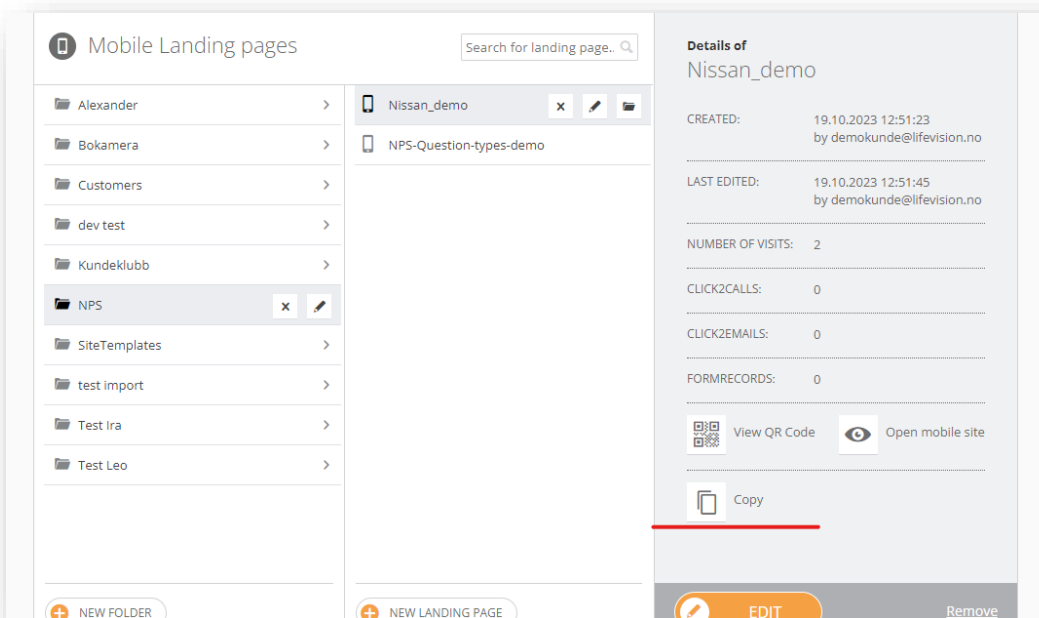
Create Landing Page

To create a new landing page (or site), 1. Click the **New landing page** button, located down to the list of landing page's folder content.

The following dialog will appear. Type a name for your landing page:



OR copy an already existing landing page:




Select Template

Select one of the existing landing page templates (you cannot reselect the template, the only solution is to delete and create the page again).


Site name

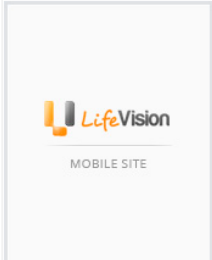
Subdomain



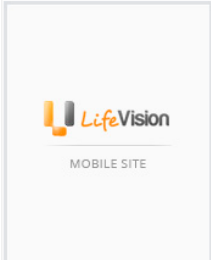
Mobile landing page

Simple Standard
Campaign templates
Demopartner's local template
Dina mallar Nissan





MOBILE SITE



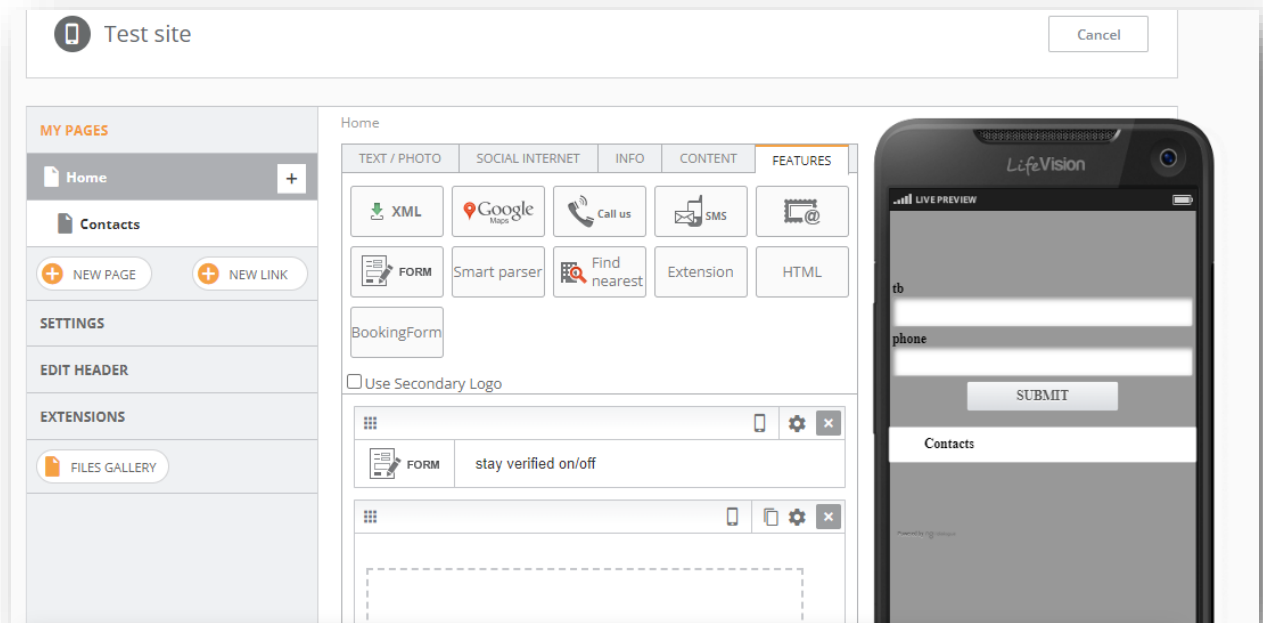
MOBILE SITE

1 Select a category 2 Edit Pages 3 Publish

NEXT STEP >

How to Place Form

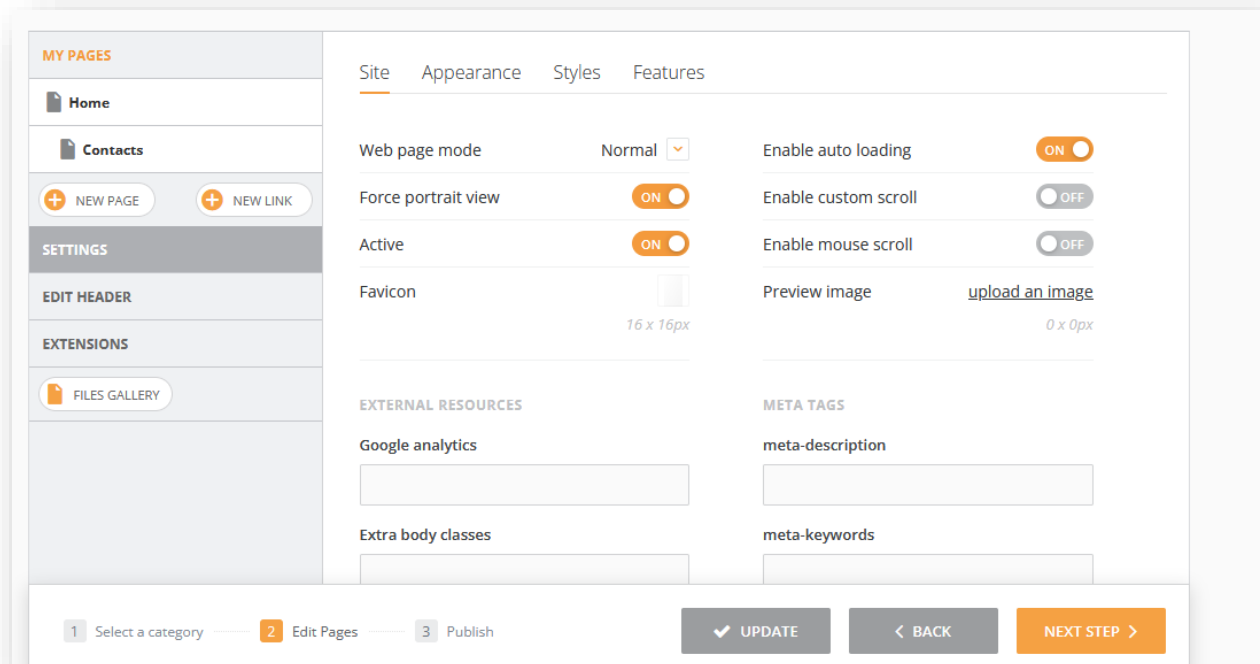
To place a form, go to Features tab.



Drag & Drop the form icon. To change the form, you can double-tap the already existing form

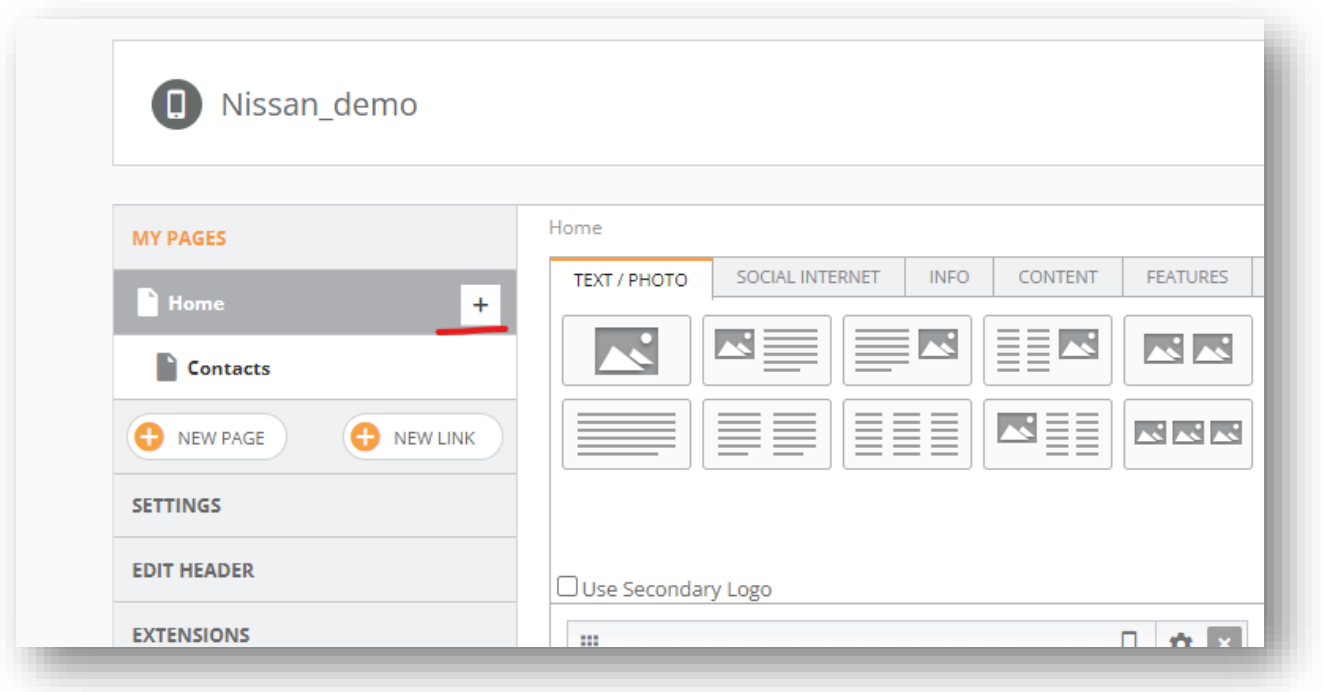
Settings

To make the landing page always be shown narrow, switch on this function. The following settings are enabled by default: "Force portrait view", "Active", "Enable auto loading".



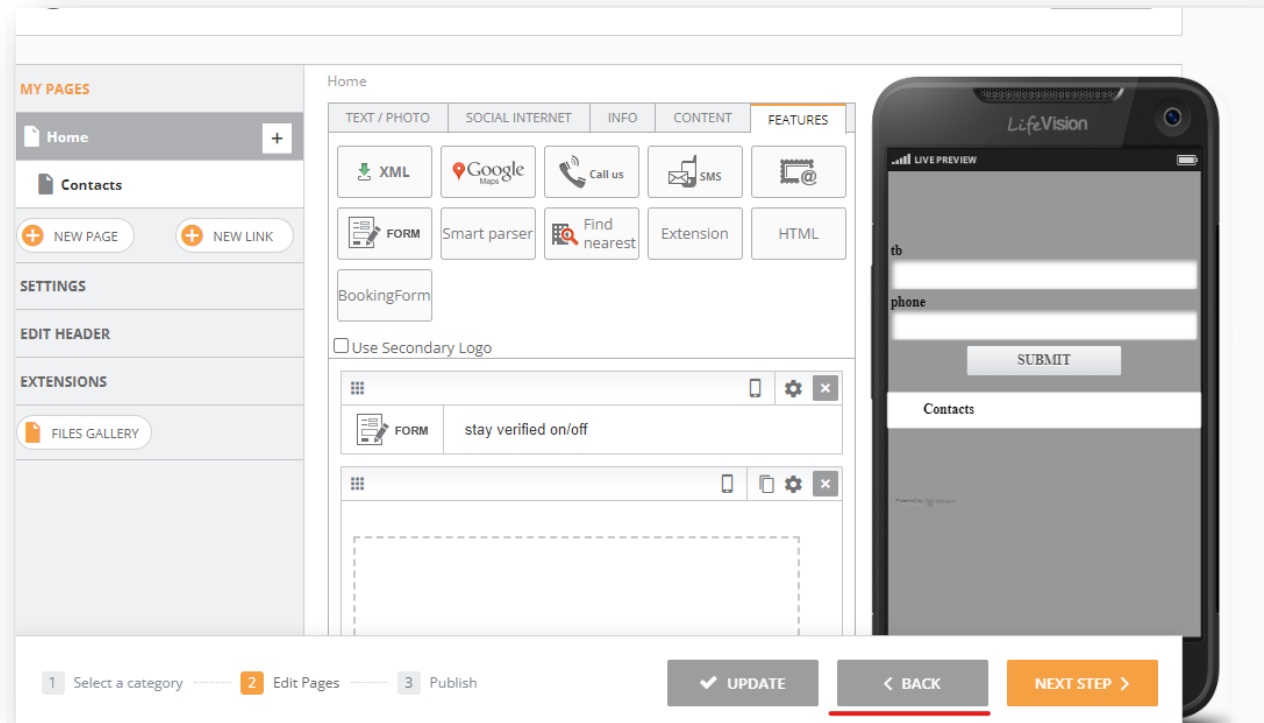
Add New Page

Adding a new page:



Rename

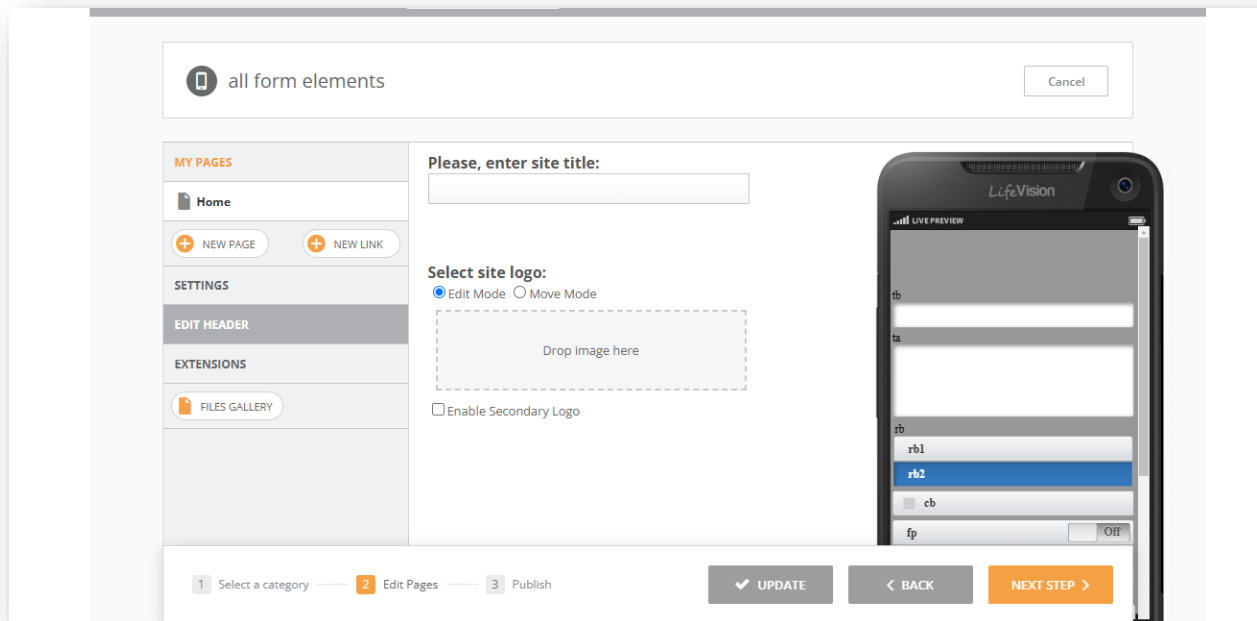
Additionally, how to rename the landing page click Back:



Change Site name and click Next Step and Publish the landing page

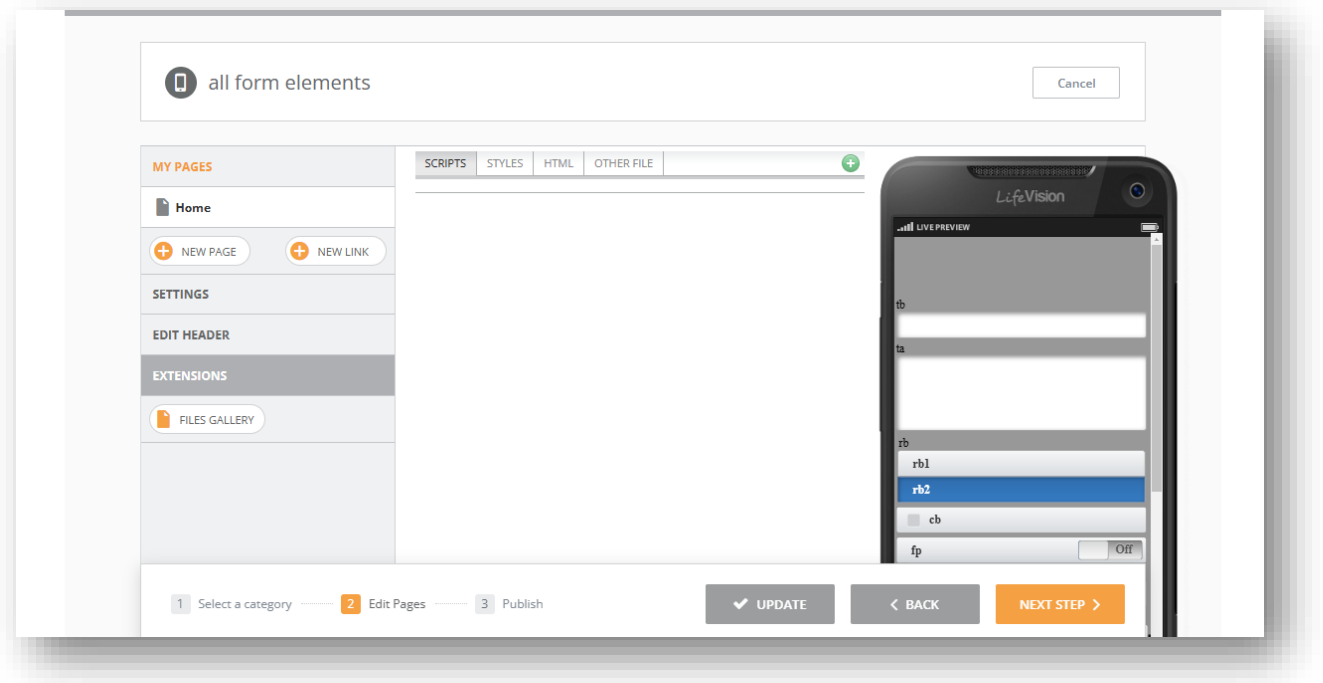
Adding Logo

Add a logo here



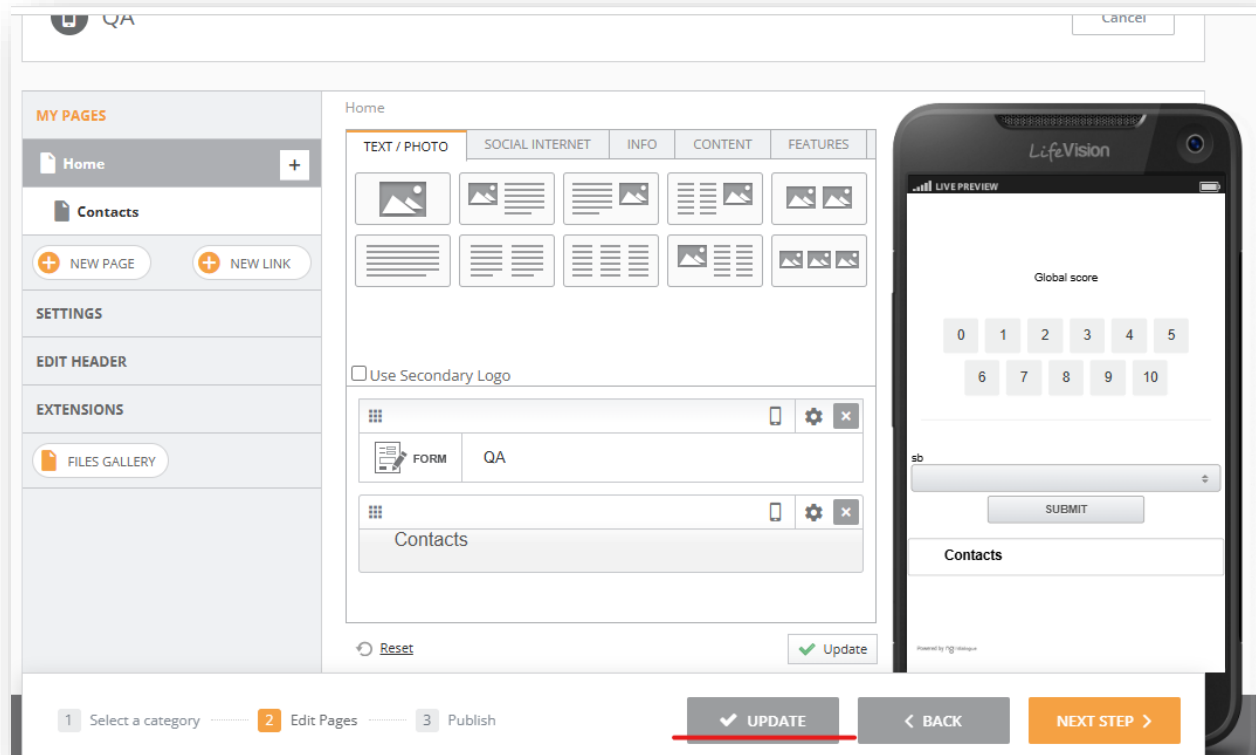
Adding Scripts and Styles

In extensions, you can add your scripts and styles



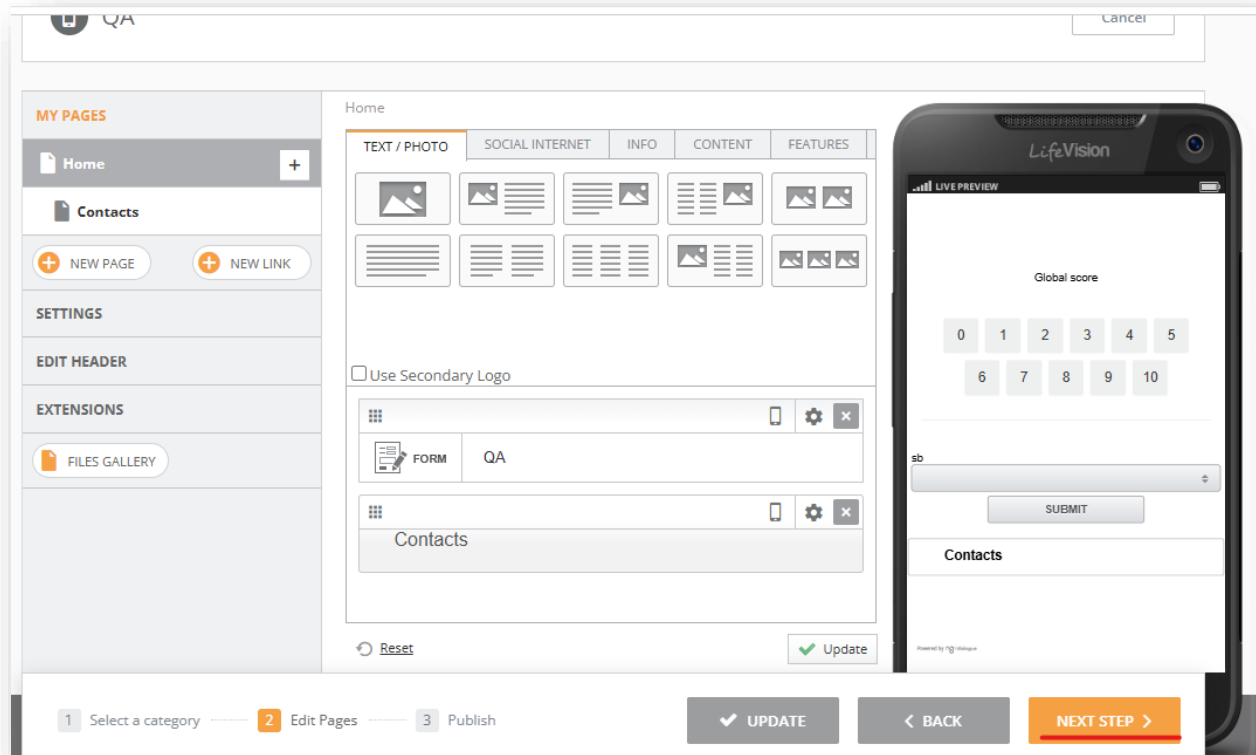
Update Button

To check applied changes, click “Update” button.



Final Step Publish Landing Page

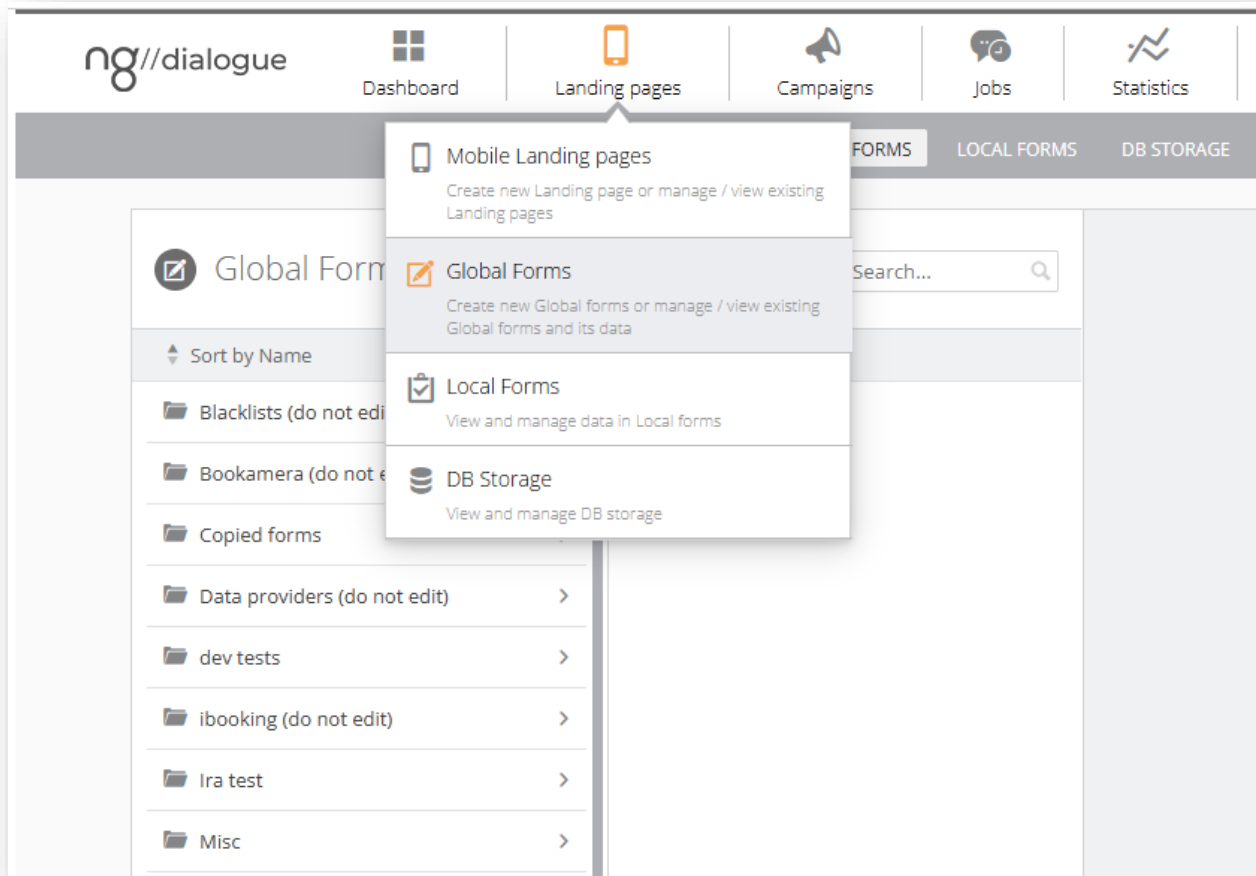
Click Next Step



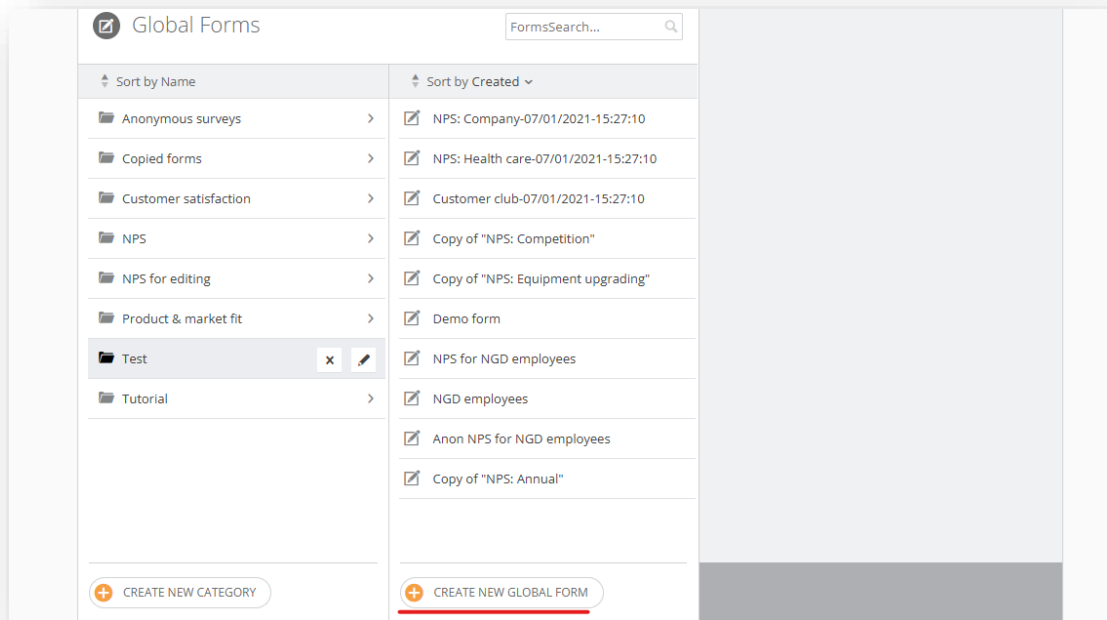
Forms

Forms are a common way to collect data from your customers. To publish the form and send it to the customer, you need to place it on one of the created landing pages.

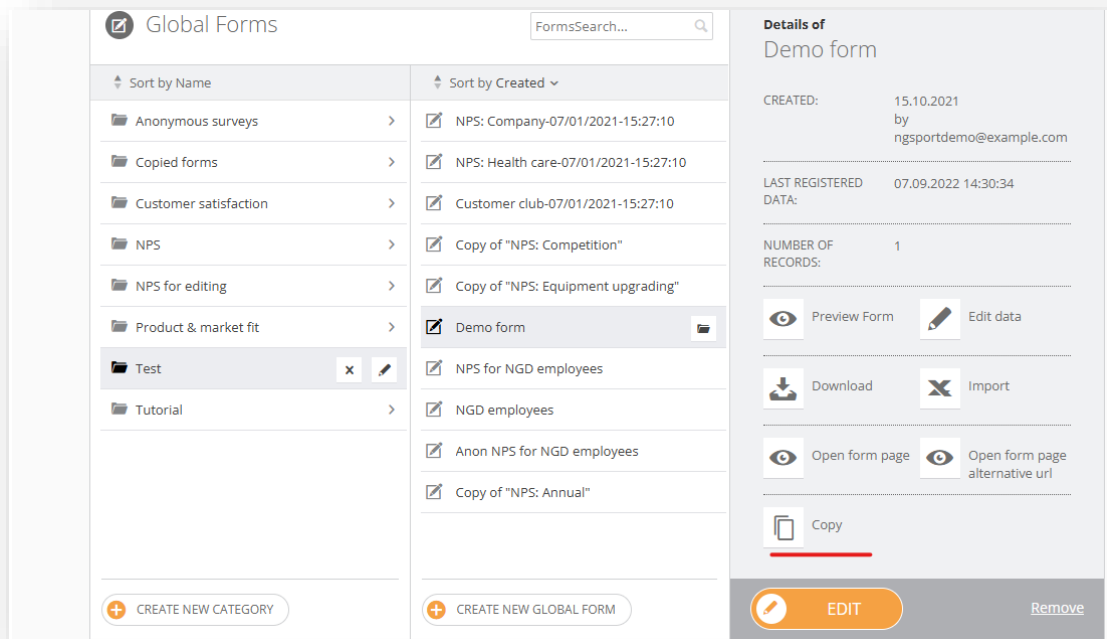
The list of your forms are placed on the menu Landing pages → Global Forms



Create New Form

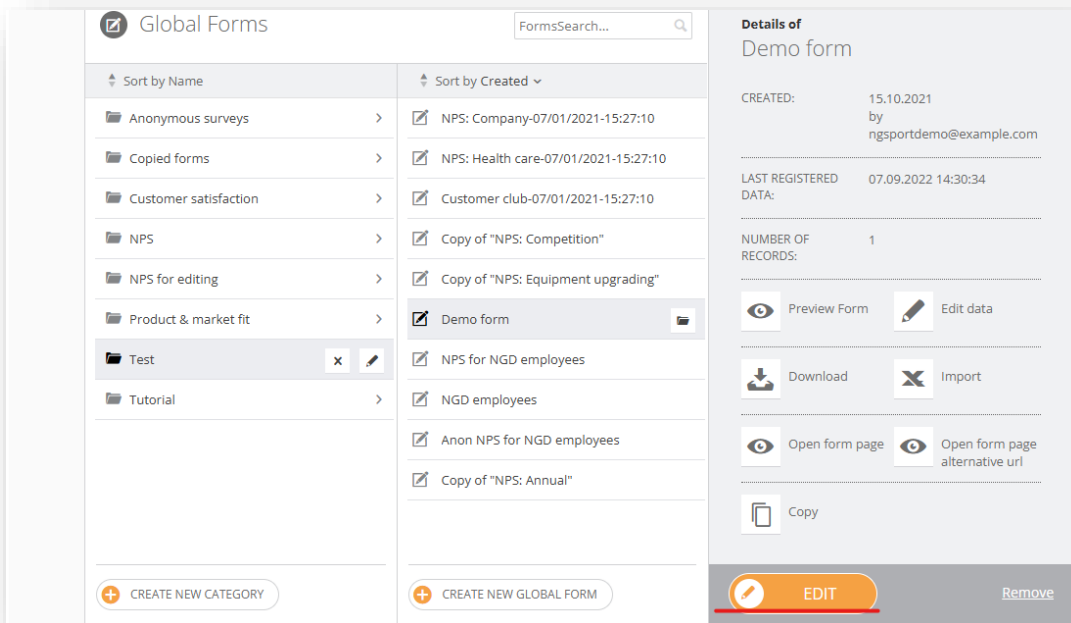


Or copy an existing one:

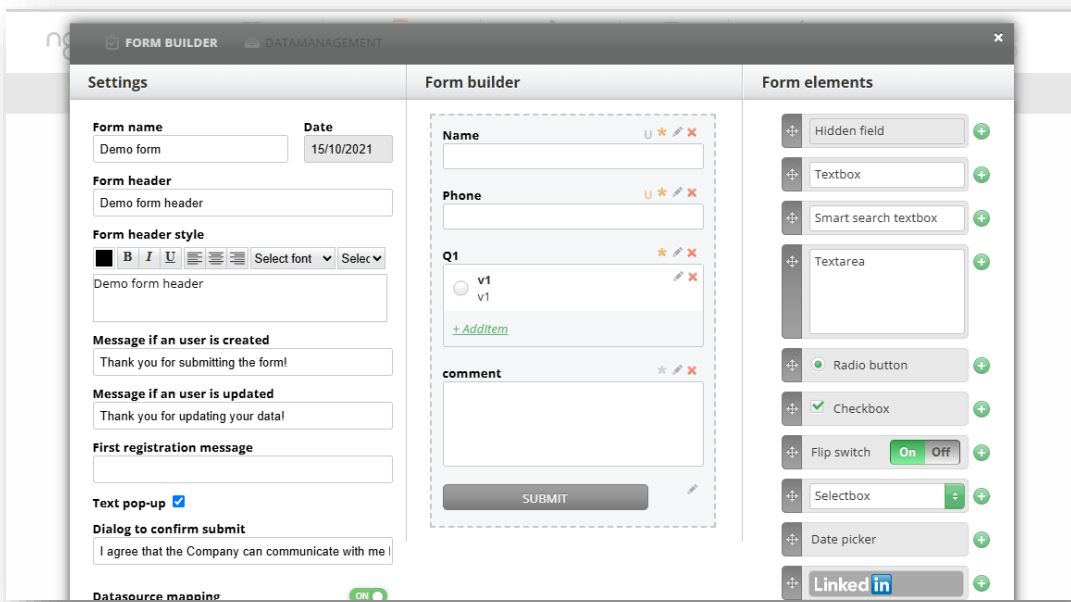


Edit Form

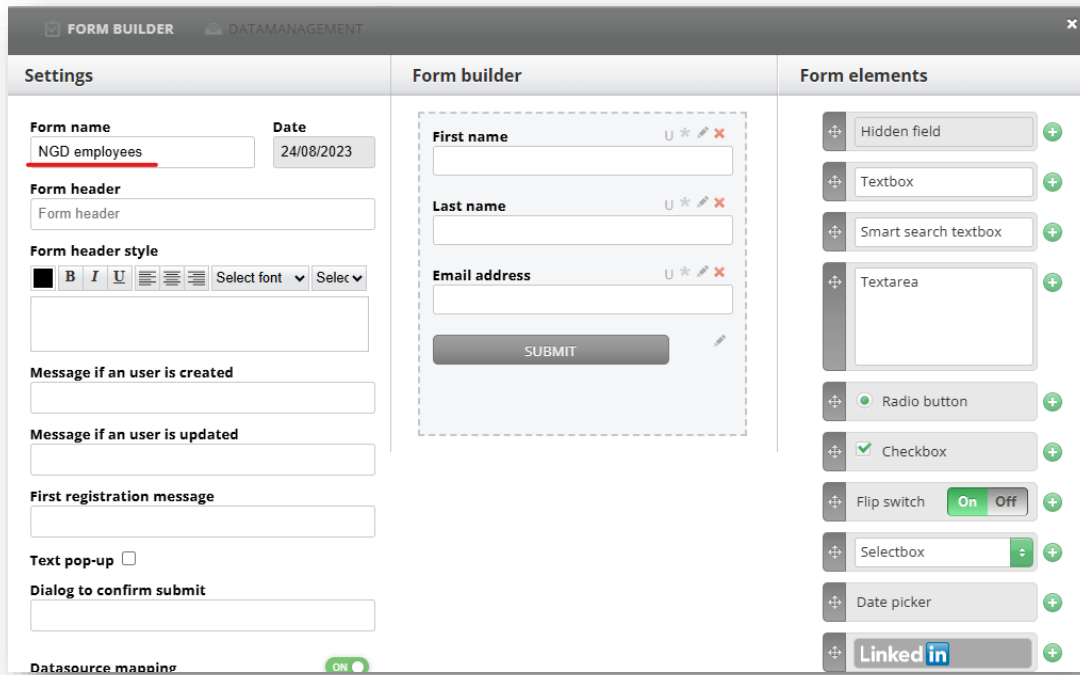
Click Edit



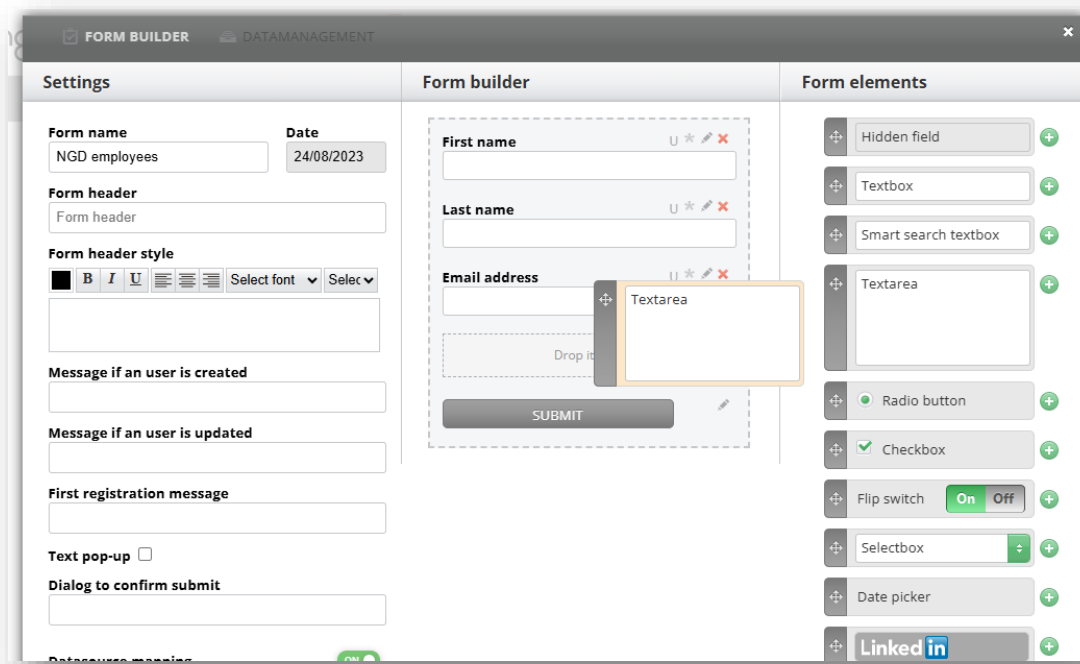
And now you can add different elements to Form Builder Area:



Add a name to your form



You can add form elements by clicking + or drag & drop



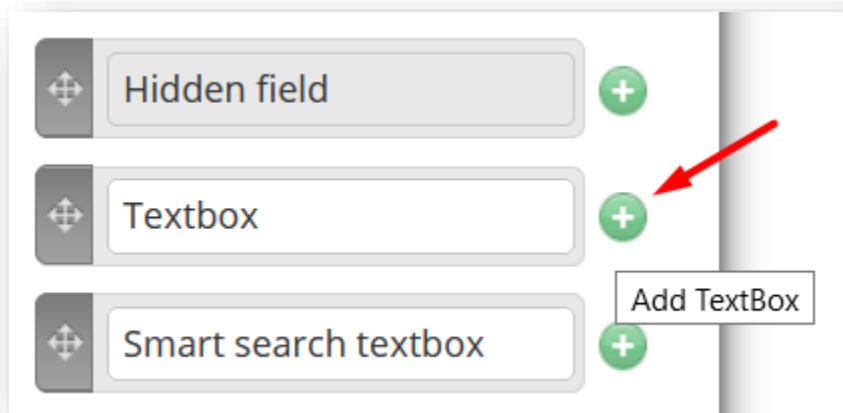
Form Elements

Element adding

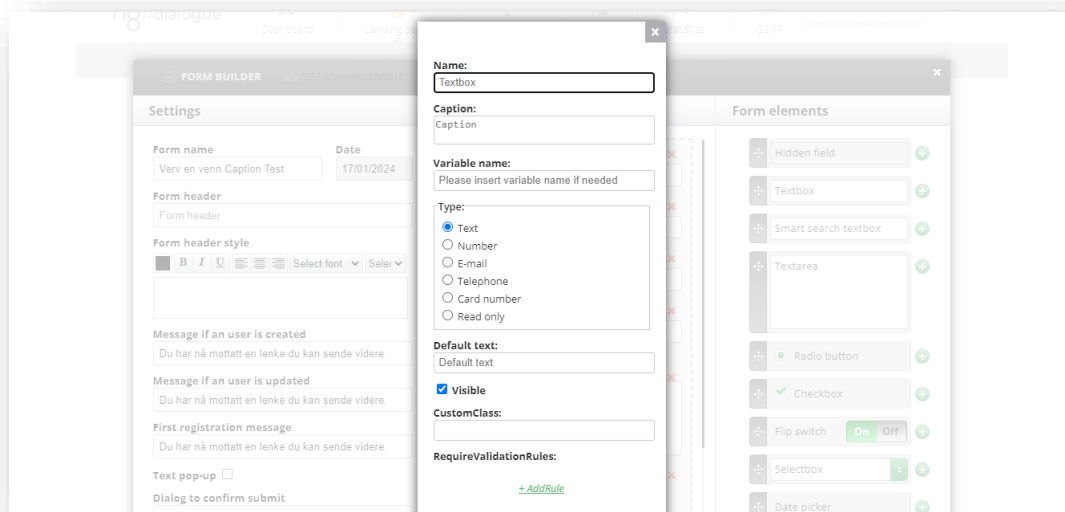
There are two ways to add an element to the form builder:

Drag and drop one of the form elements

Click a plus button



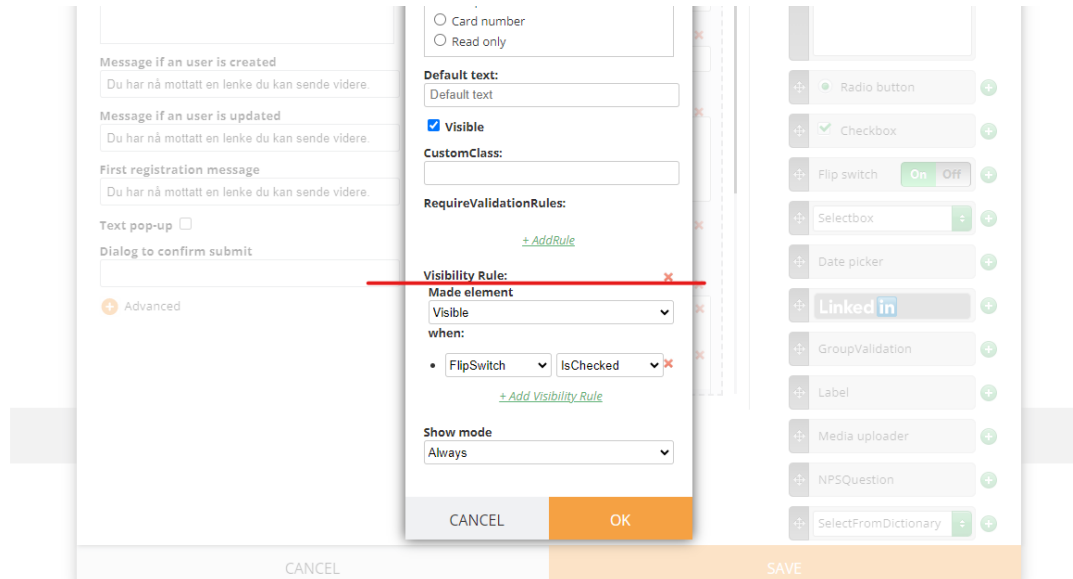
Element Attributes



- Name - an internal name of the element (*first_name*);
- Caption - text that will be seen in the interface and for those who fill in the form (*First Name*);
- Variable name - optional but you may need it to 1) set up confirmation actions or 2) include variables in the Excel report 3) if you name your variable *firstname*, you can add this variable when sending out the campaign and personalise the text “Hello %%*first_name*%%” the system will automatically add the recipient's first name to the text;
- Type - attribute of data that tells how to use it.

NB! Phones and email must be always set up as Telephone and E-mails respectively, it is needed for correct data processing and subsequent usage;

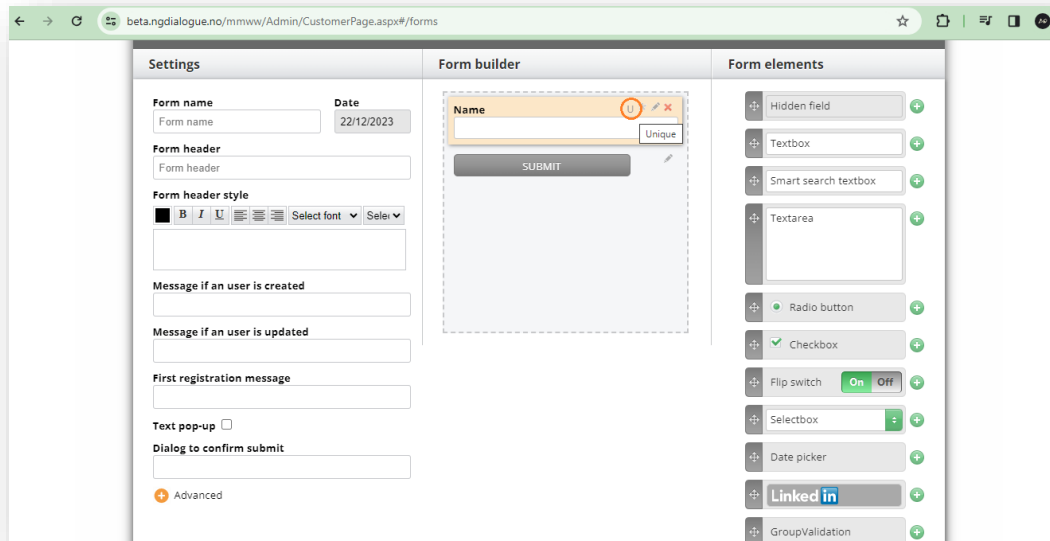
- Custom class - you can use any custom CSS class that was set up for the landing page that contains this global form.
- Visibility rule - The visibility rule allows you to show the element depending on the other element's value.



- names have to be unique, no duplicates are allowed;
- this is not a rule for Caption, it can be written with any symbols using space or be a duplicate;

Element options

- **U** - “unique”. This feature means that data submitted to this field has to be unique. For example, if you send out one campaign once a year to get updates from your customers, the customer won't be able to submit the same information as this feature requires the data not to be a duplicate;

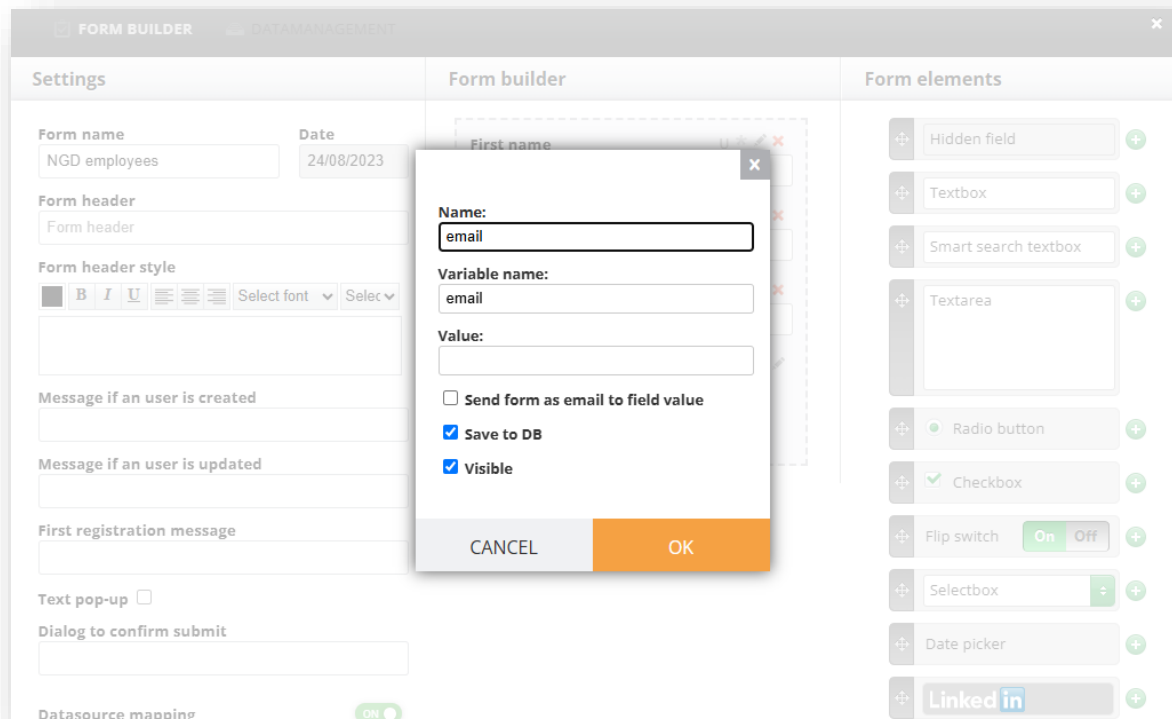


- ***** - “required” means a user will not be able to submit the form without entering data in this field;
- pencil - “edit” feature;
- cross - “remove” feature;

Types of Elements

Hidden Field

Hidden fields are not seen by the recipient, but they allow you to see additional information when the form is submitted. For example, a name, customer id or city.



To get this hidden field work, you need to map the member either via Excel or datasource. Hidden field's variable name must match the Excel or datasource's column name.

Smart Search Textbox

The element allows a user to select from limited range of options with the ability to start entering the value in the text field to find the similar (like cities):

The screenshot shows a web form titled "smart search" with a blue header image. The form contains the following elements:

- A "smart search" label above a text input field containing "Oslo".
- A dropdown menu below the search field showing "Oslo" as the selected option.
- A "Last name" label above a text input field.
- An "Email address" label above a text input field.
- A dark teal "SUBMIT" button with a right-pointing arrow.
- A footer area with the text "NG Sport AS".

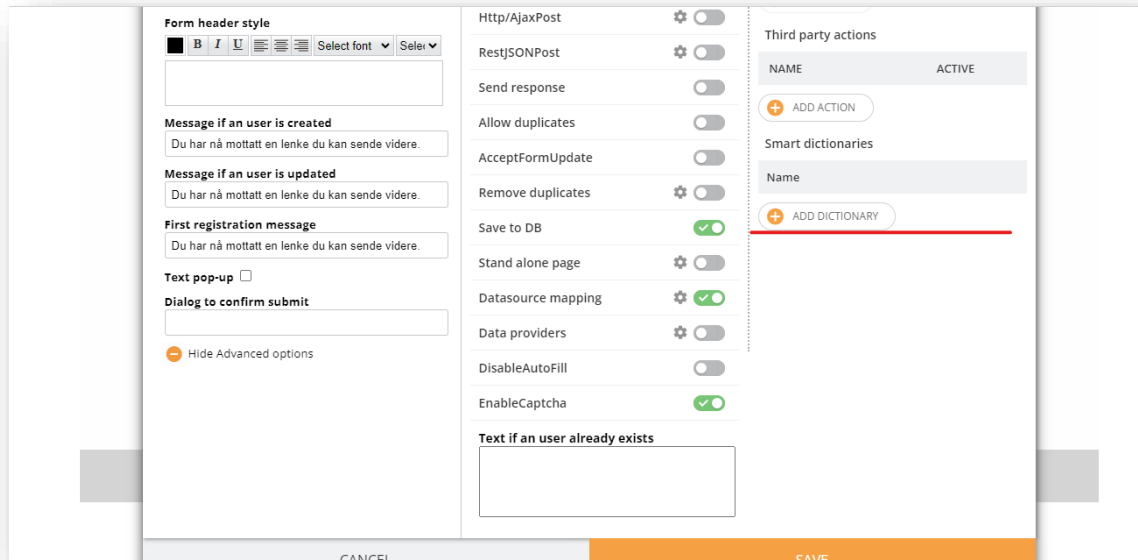
The element:

The screenshot displays a form builder interface with a central configuration dialog for a "Smart search textbox" element. The dialog includes the following fields and options:

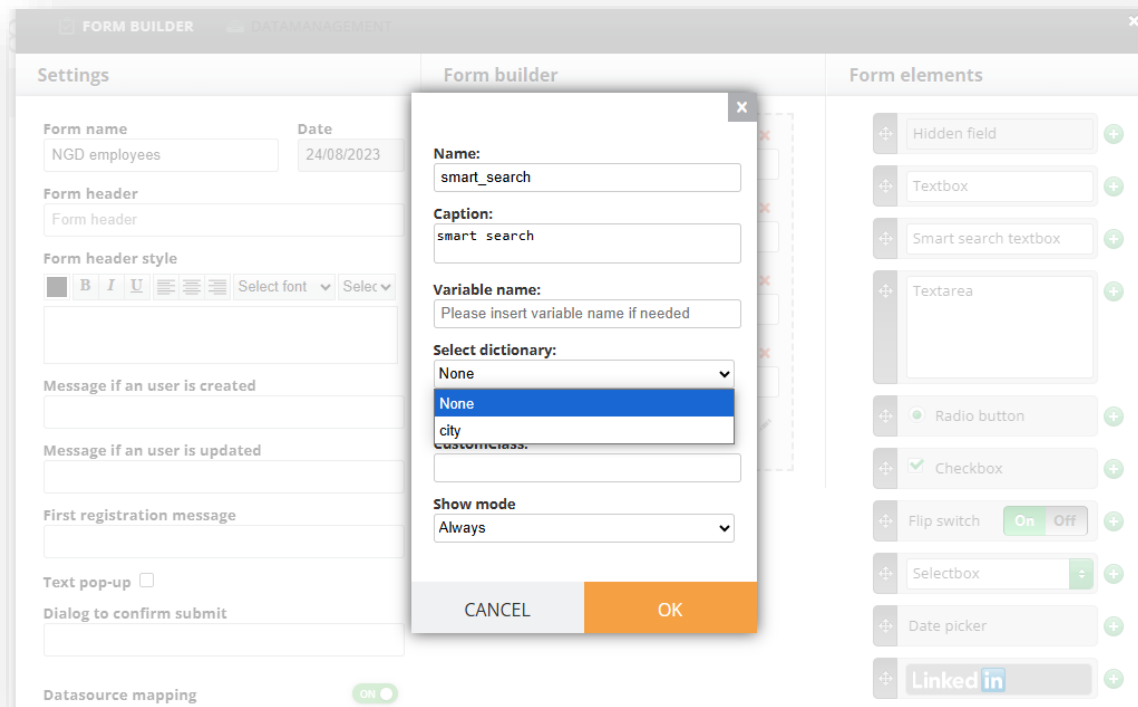
- Name:** Smart search textbox
- Caption:** Caption
- Variable name:** Please insert variable name if needed
- Select dictionary:** None
- Visible:**
- CustomClass:** (empty field)
- Visibility Rule:** [+ Add Visibility Rule](#)
- Show mode:** Always

The background shows a form builder interface with a left sidebar for form settings (Form name, Date, Form header, Form header style, Messages, Text pop-up) and a right sidebar with a list of form elements including Hidden field, Textbox, Smart search textbox, Textarea, Radio button, Checkbox, Flip switch, Selectbox, Date picker, Linked in, GroupValidation, Label, and Media uploader.

The dictionary can be added within the form in Advanced settings from an Excel:

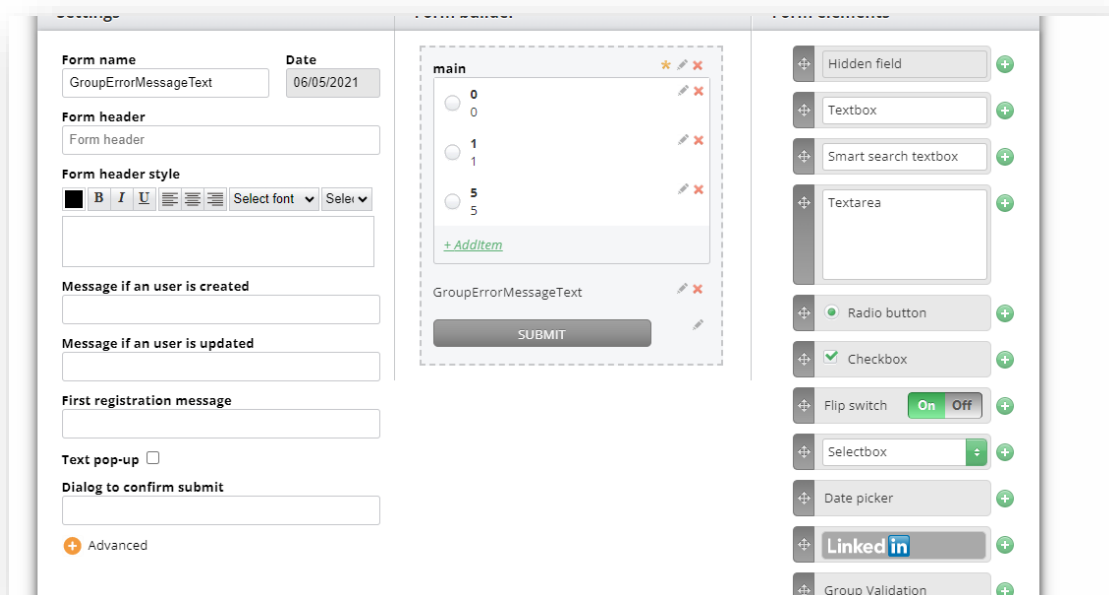
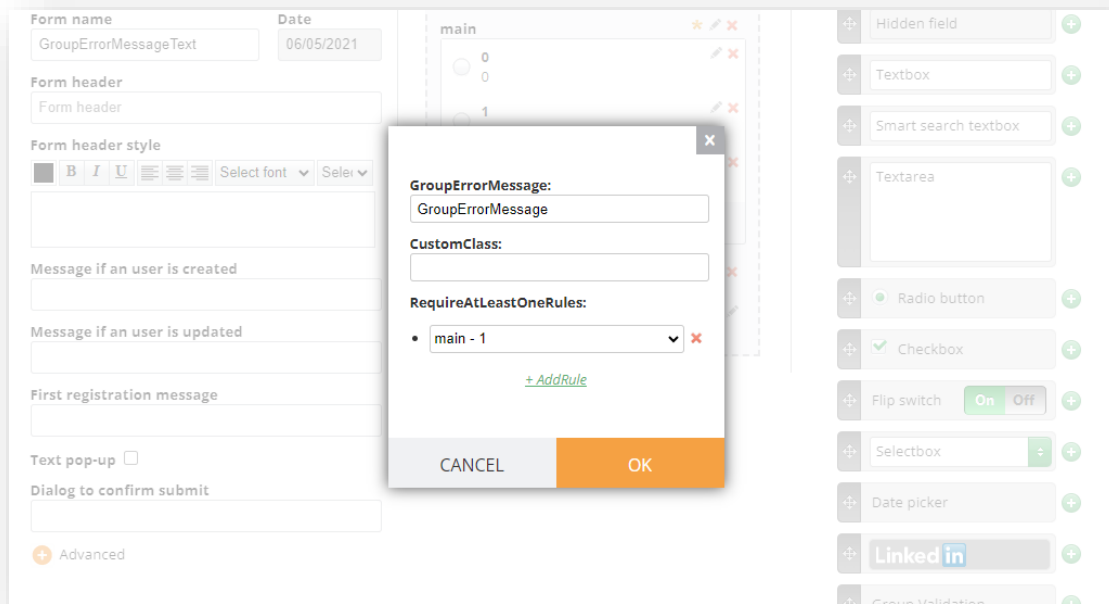


And then added to the element



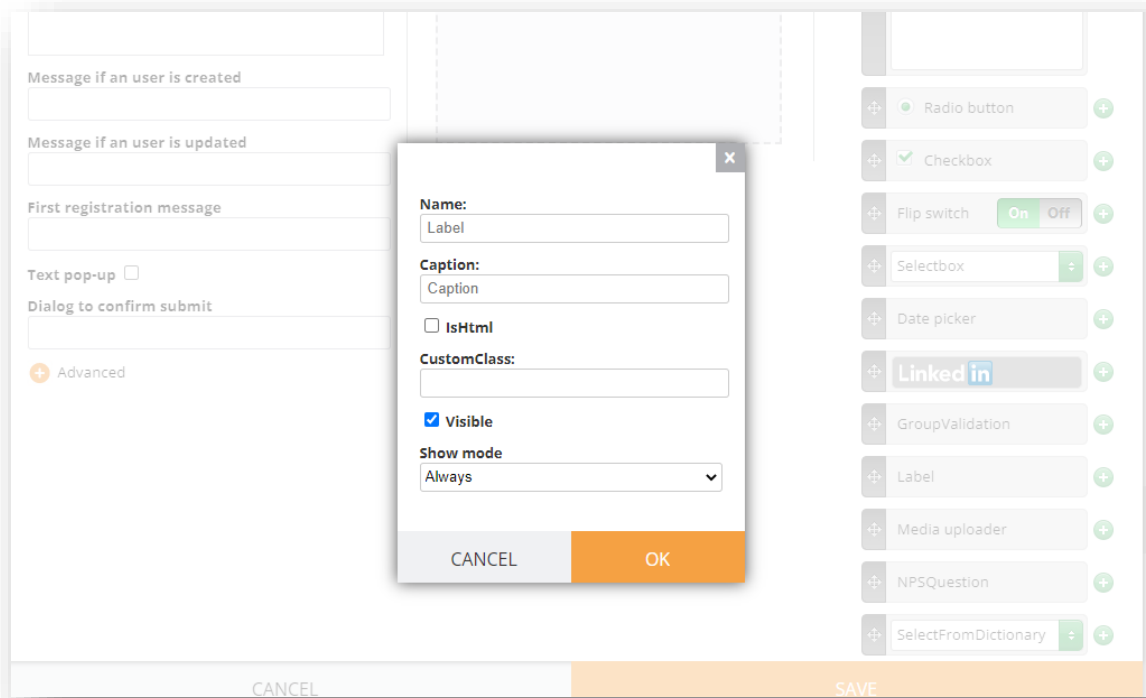
Group Validation

This element is used to show the error to other elements separately. If you need to check any of the boxes, for example. Or if you choose one, you must choose the other and without it the form cannot be submitted.



Label

It allows you to add additional info to the field in the form.



Checkbox

Create any checkbox as it is pictured on the screenshot.

In this example you get an email field that appears only in case checkbox is checked.

Allow to contact me via email

Email

Settings

Form name: NGD employees Date: 24/08/2023

Form header: Form header

Form header style: B I U Select font Select

Message if an user is created

Message if an user is updated

First registration message

Text pop-up

Dialog to confirm submit

Datasource mapping

Form elements

- Hidden field
- Textbox
- Smart search textbox
- Textarea
- Radio button
- Checkbox
- Flip switch On Off
- Selectbox
- Date picker
- Linked in

Checkbox Settings Dialog:

Name: Checkbox

Caption: Caption

Variable name: Please insert variable name if needed

Send to email: Send to email

GDPR consent: None SMS E-mail

Visible

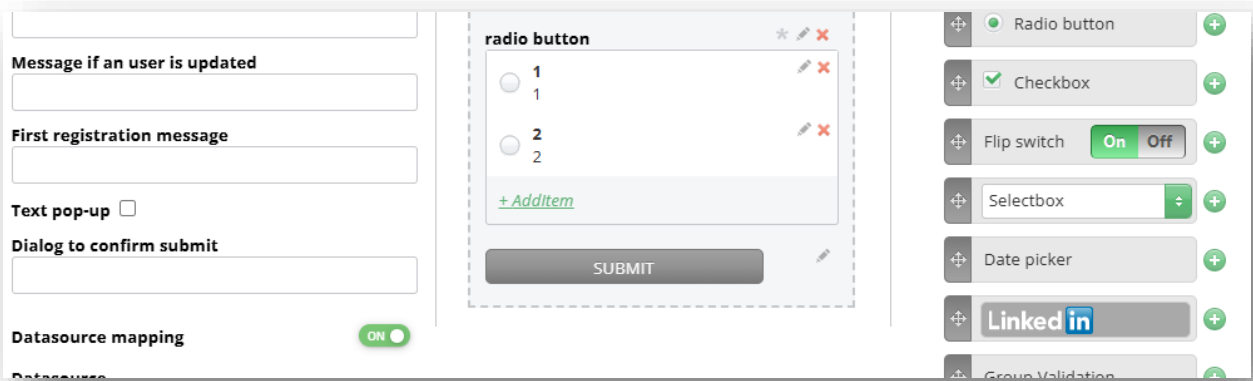
CustomClass:

Show mode: Always

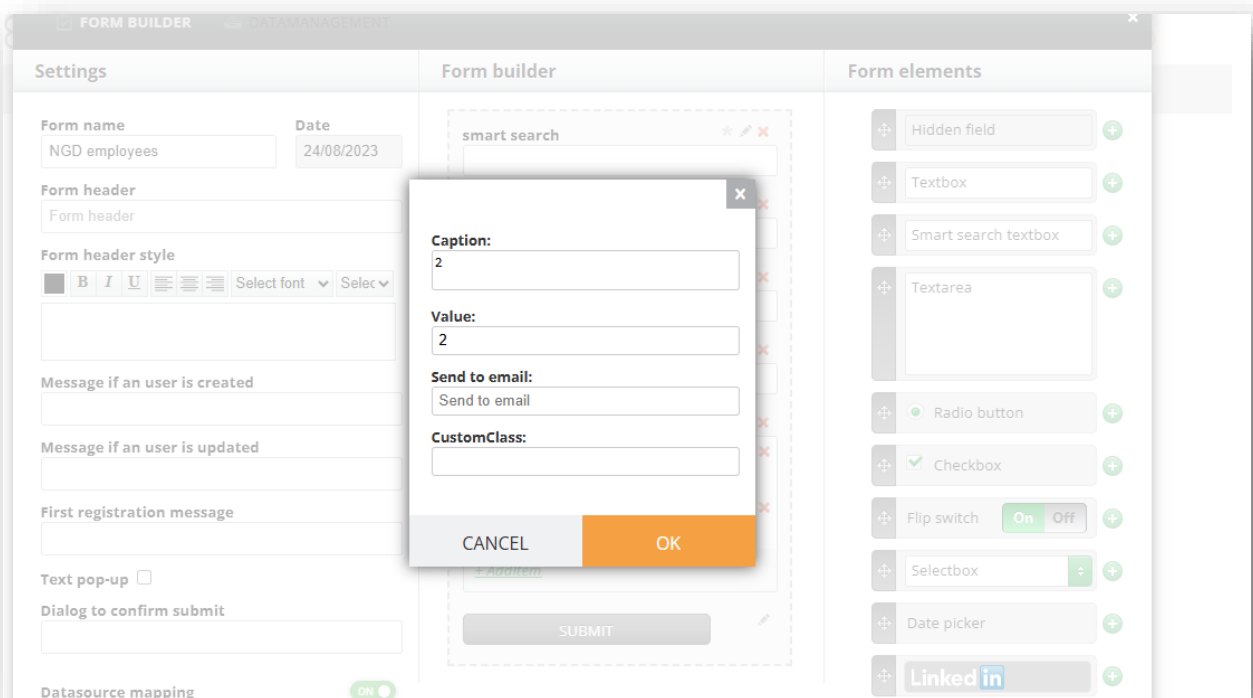
CANCEL OK

Radio button

Create a radio button:

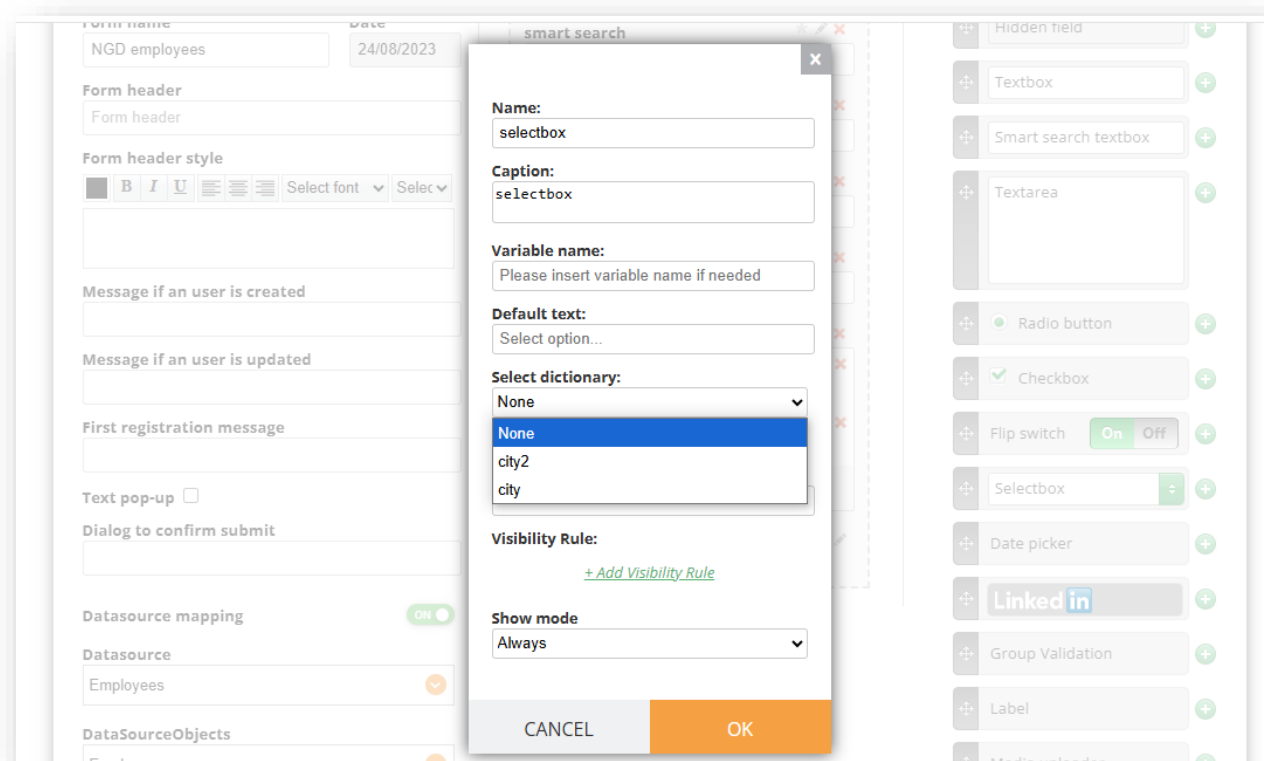


Each button value's edit menu:



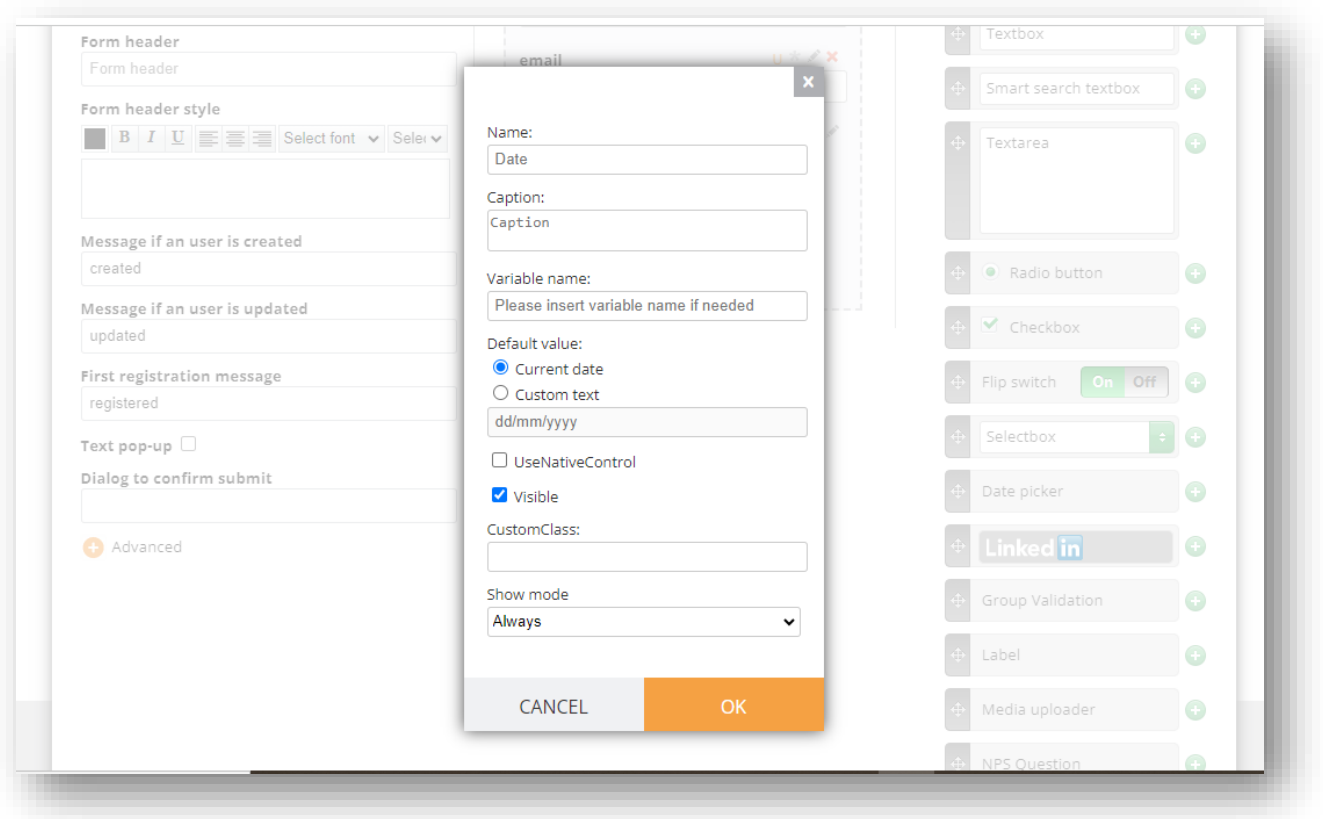
Selectbox

The element allows a user to select from limited range of options (like cities):



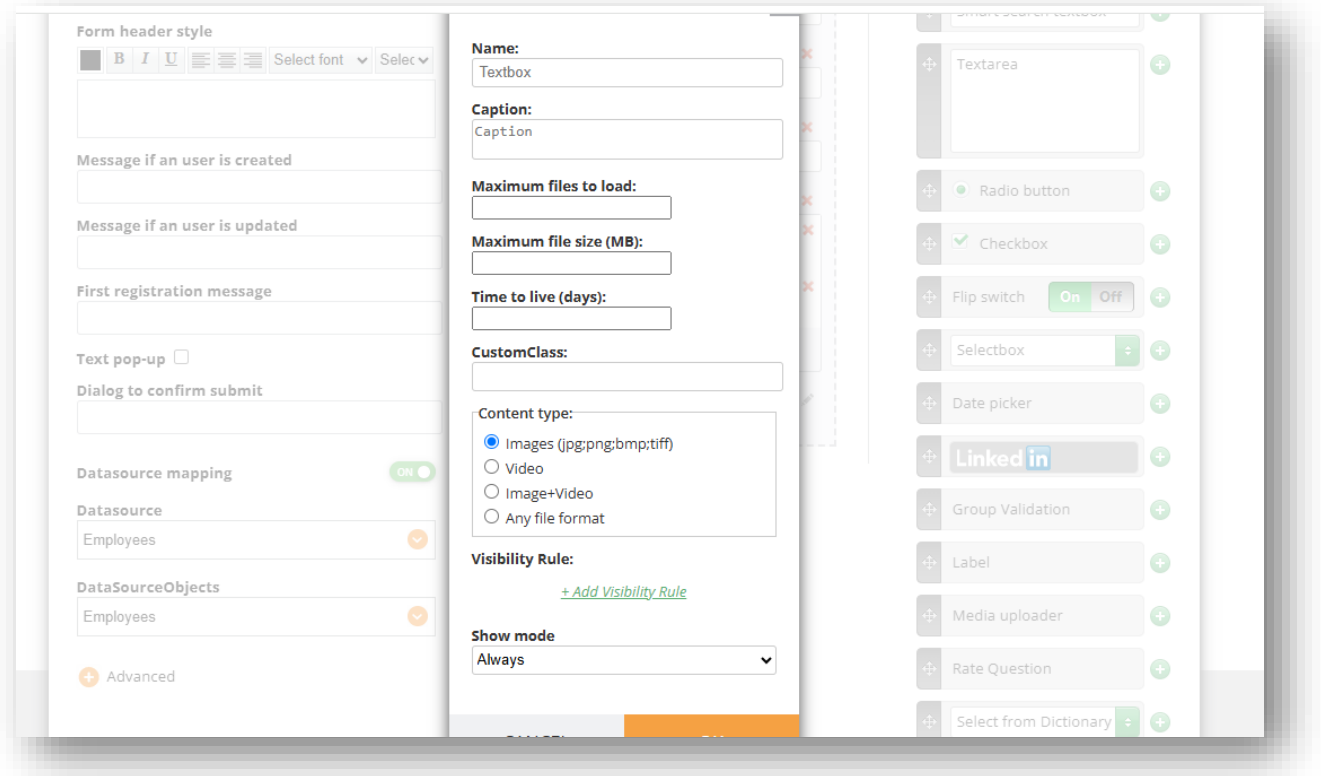
Date Picker

Allow users to enter custom dates:



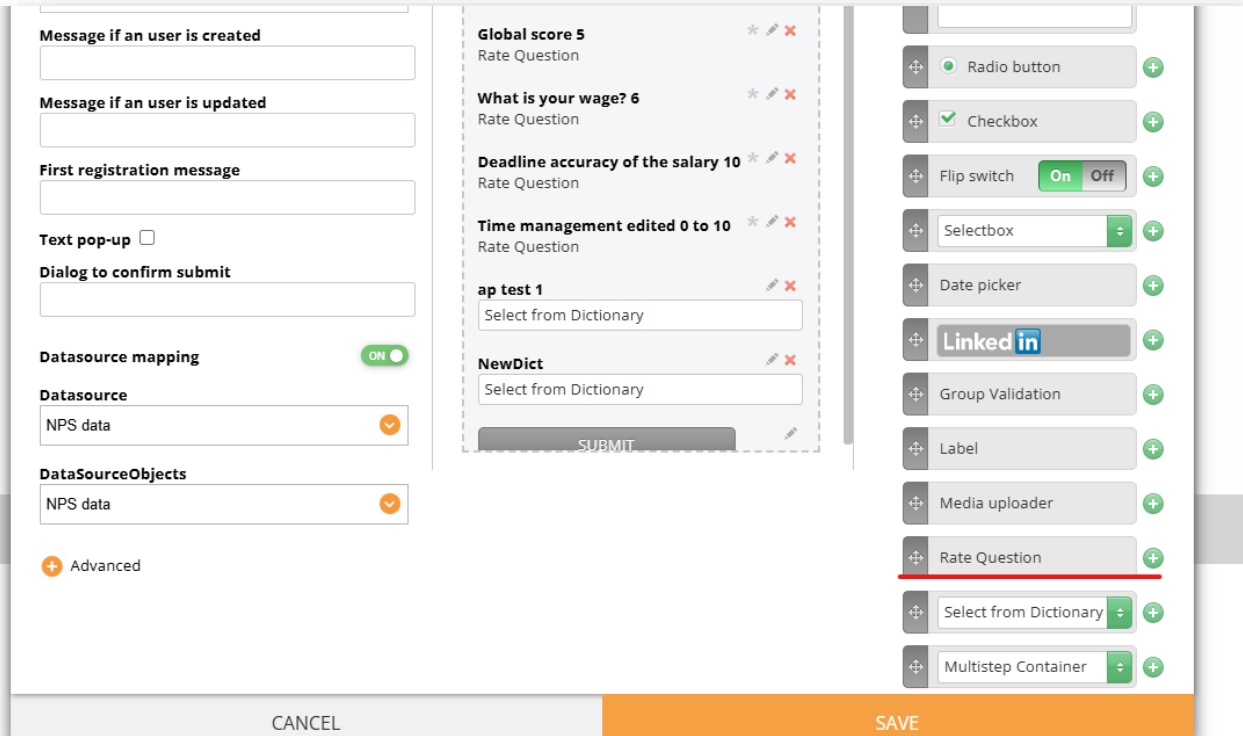
Media Uploader

With this form builder element, users can upload their files right in your form. The verification must be enabled (directly in the form or by a unique link) for users to upload files)

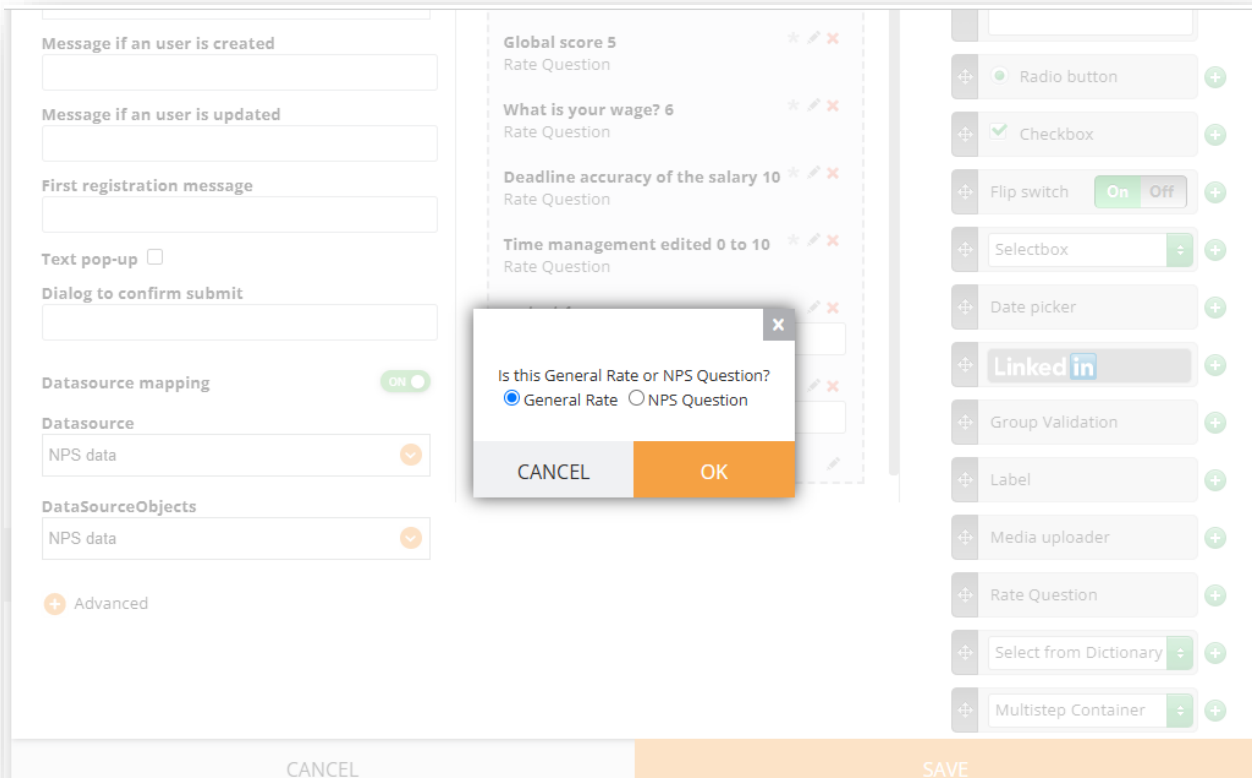


Rate Question

If you want to set a rating (Likert scale, score) question, you can choose Rate Question.



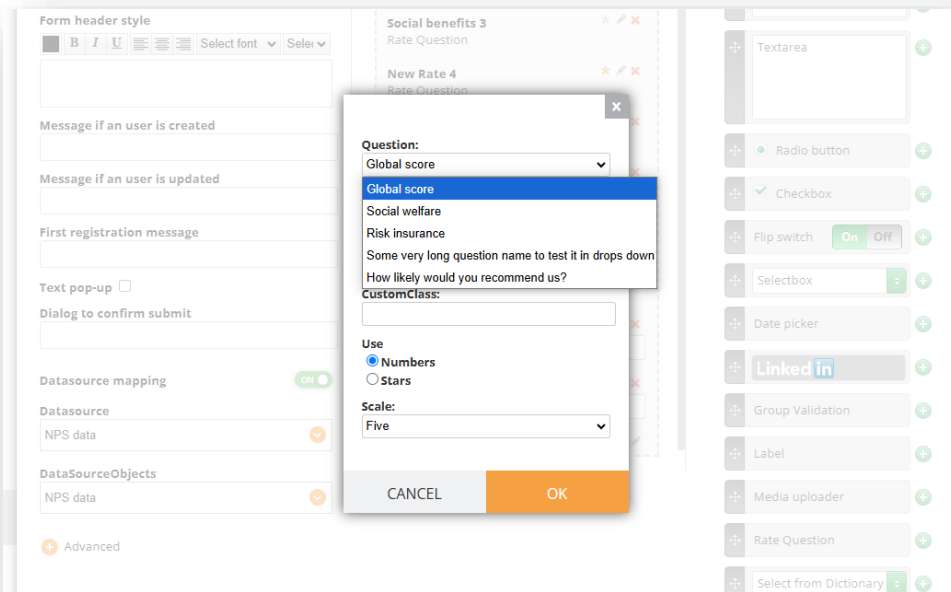
When you select Rate Question, you can choose the subtype. General Rate is used for the surveys with forms data collection only (without datasources and mapping) meanwhile NPS Question used for NG Surveys (the questions added via Dashboard and then mapped to the form).



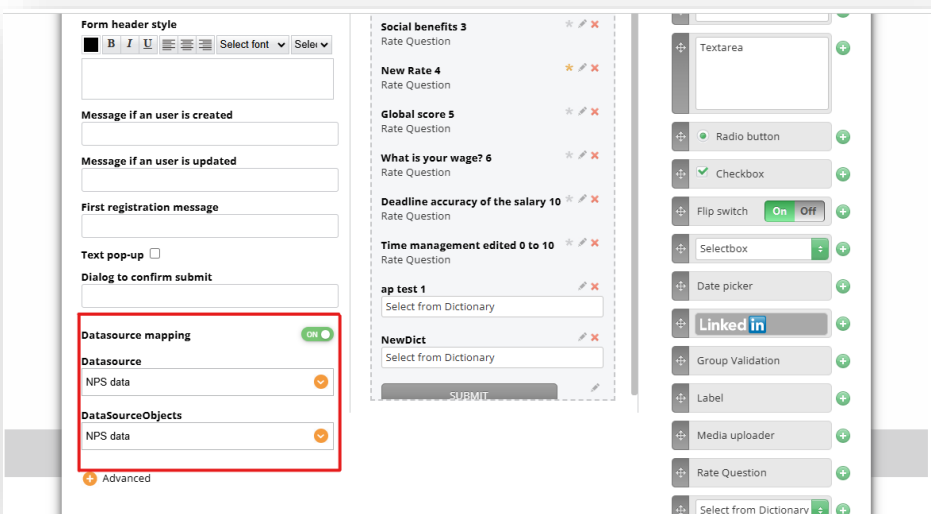
If the General Rate is used, you just add name (internal), caption (visible to users), select Numbers or Stars and then scale.

Scale options for General Rate

If you use Datasource mapping, use NPS Question. You do not need to manually type in the caption and map each question: simply select it from the list of the questions previously added via Dashboard:

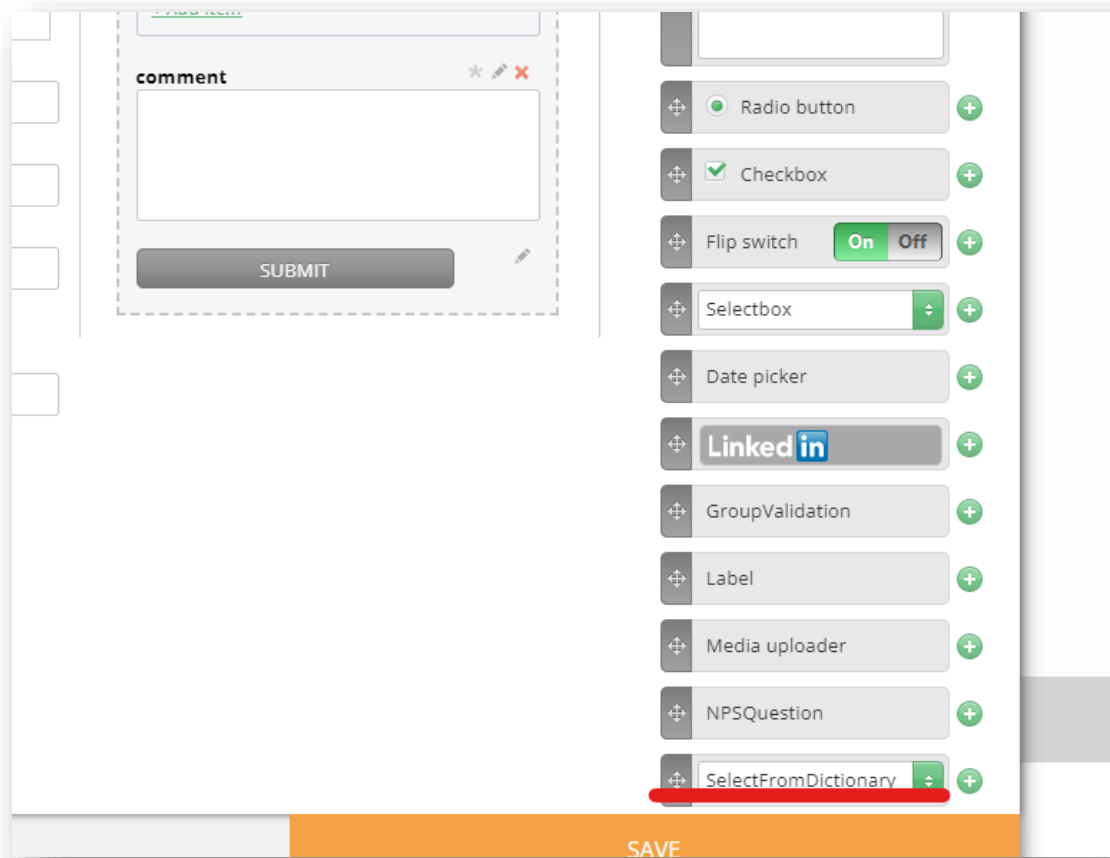


To be able to use the NPS Question, you need to enable Datasource mapping. Now can be done here:

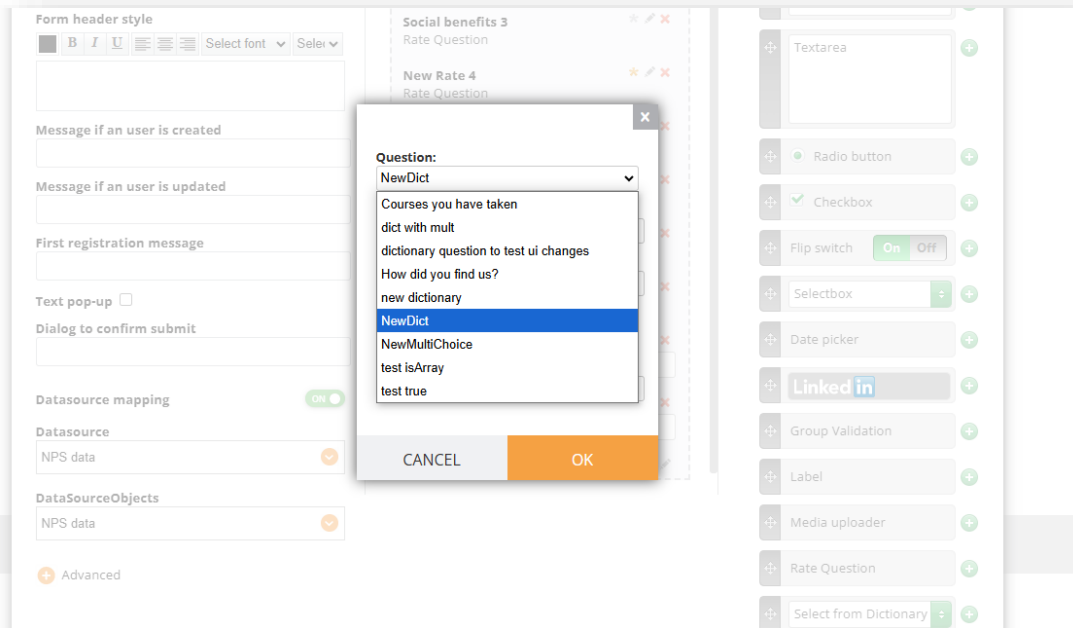


Select From Dictionary

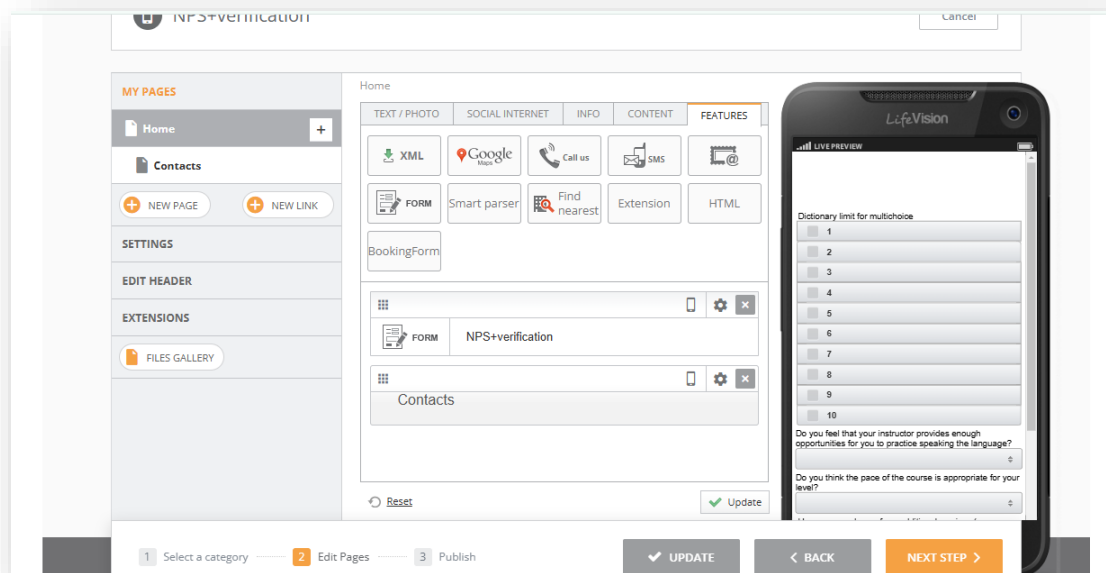
If you have your Dashboard set up with questions, you can add dictionaries to the form. For example, not just questions that require rating but questions that give A, B, C answers. If you have your questions on the Dashboard, you do not need to type them again: once they are on Dash and you map your form with your NPS datasource, you will be able to choose them in the form.



The list of questions from Dashboard:

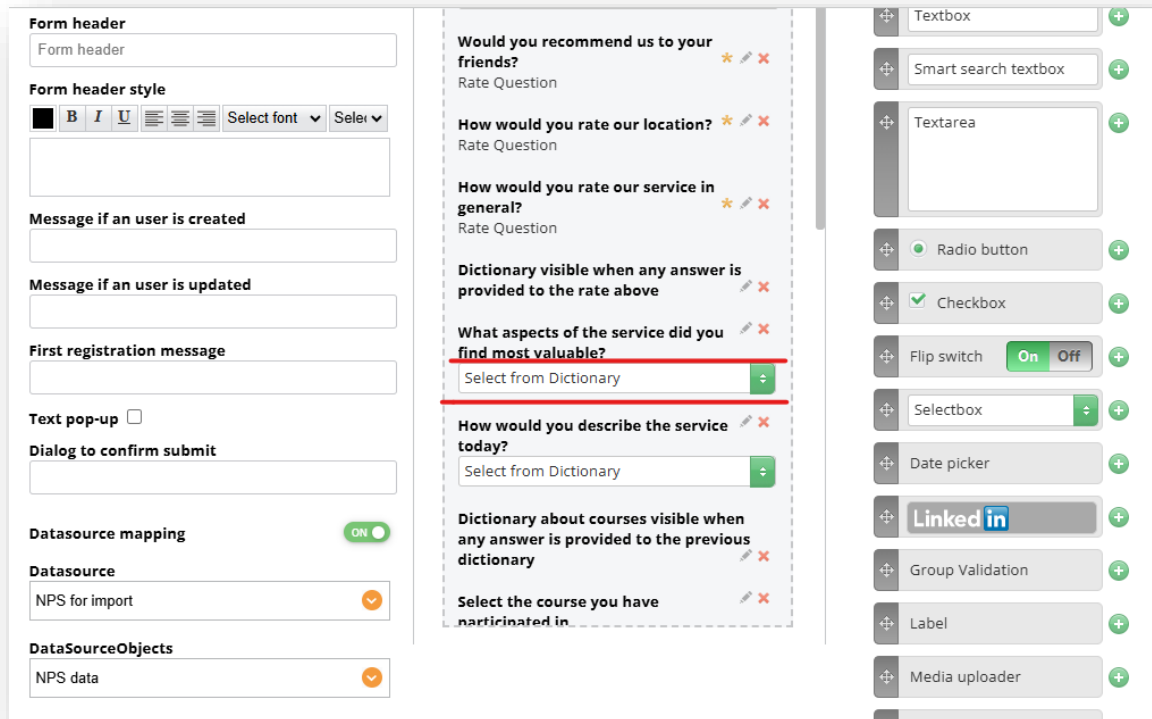


NB! if testing the landing page with this type of element, you may not see these questions. They are only visible if you have a memberlink or in Landing Page Edit mode

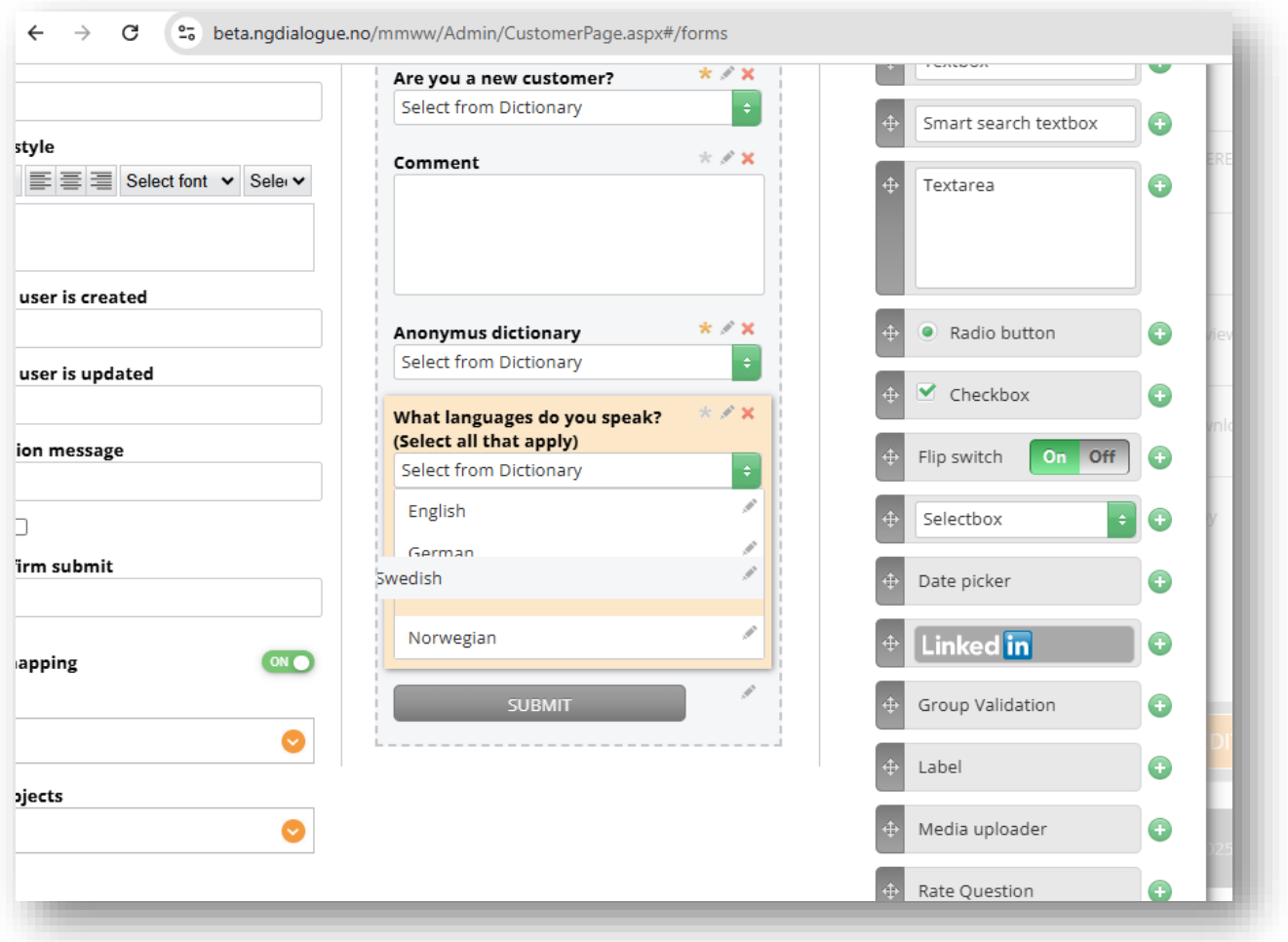


If you do not have NPS datasource with dictionary questions set, you can use Radiobuttons for a small number of questions or SelectBox for a larger number or Smart Search Box

If you need to change the order of options, click on the select area of the question within the area highlighted with red



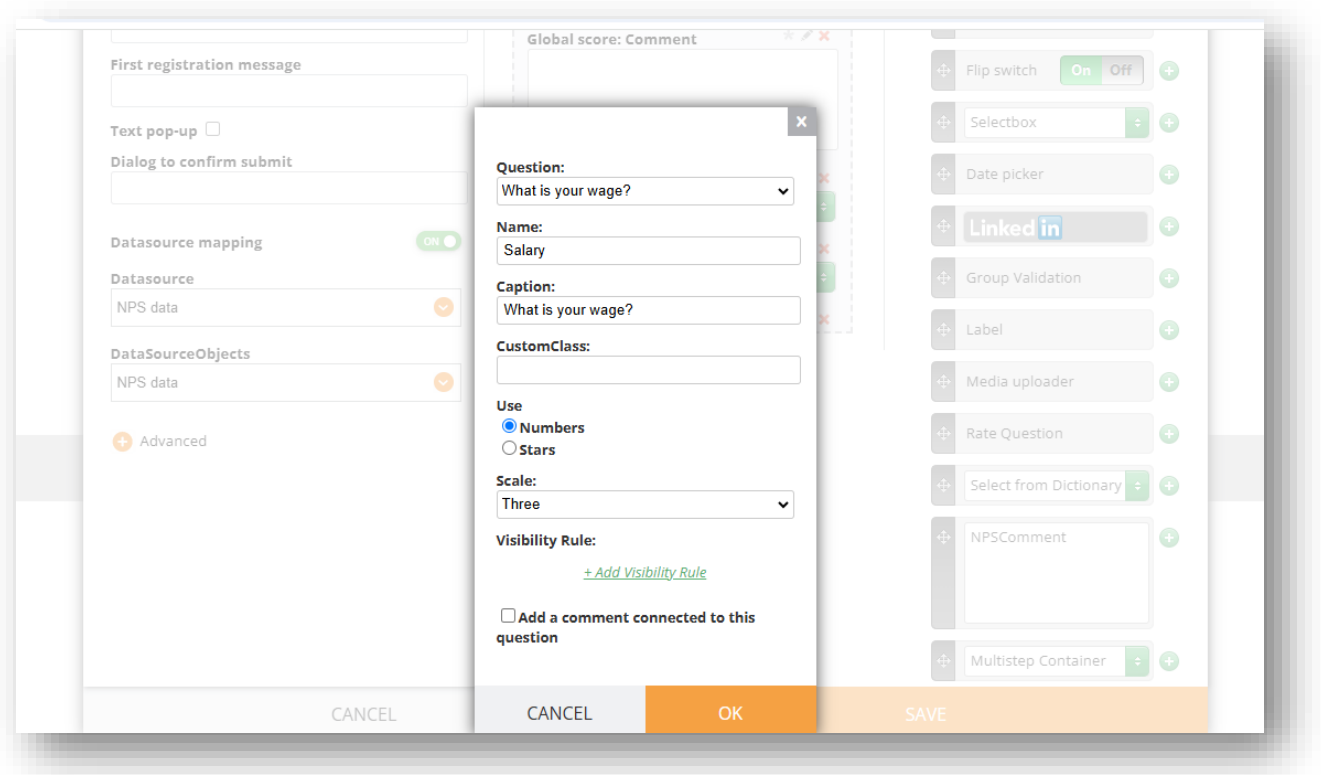
And change the order by dragging. For changes to be applied, save the form and reload the landing page containing this form.



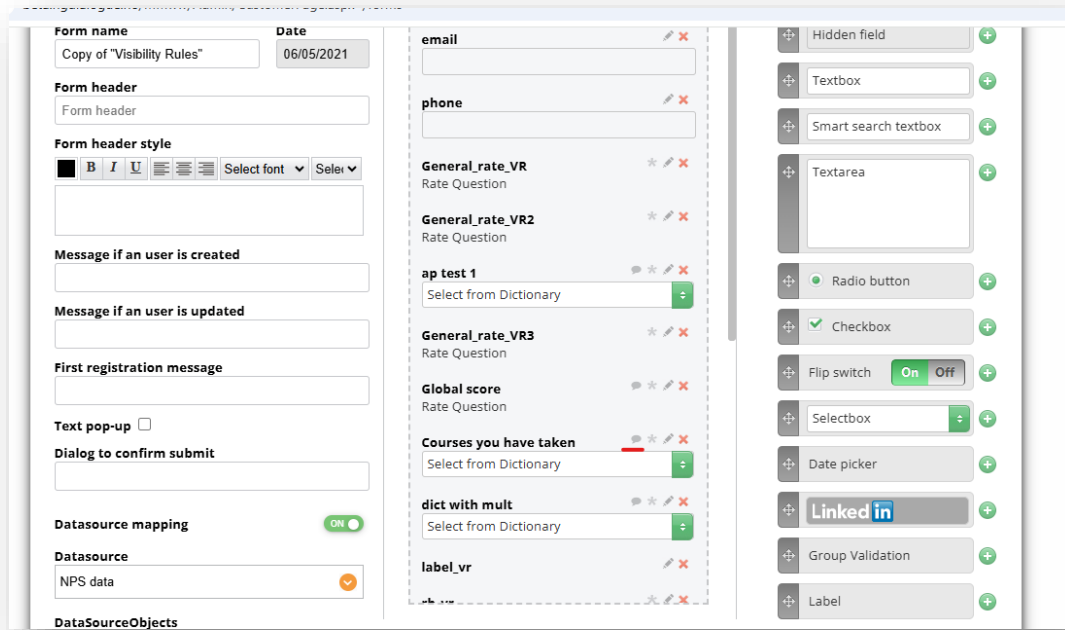
Comments on Survey

If you have a mapped form (form that will be using questions from Dashboard for Survey), you can add comments in a few different ways:

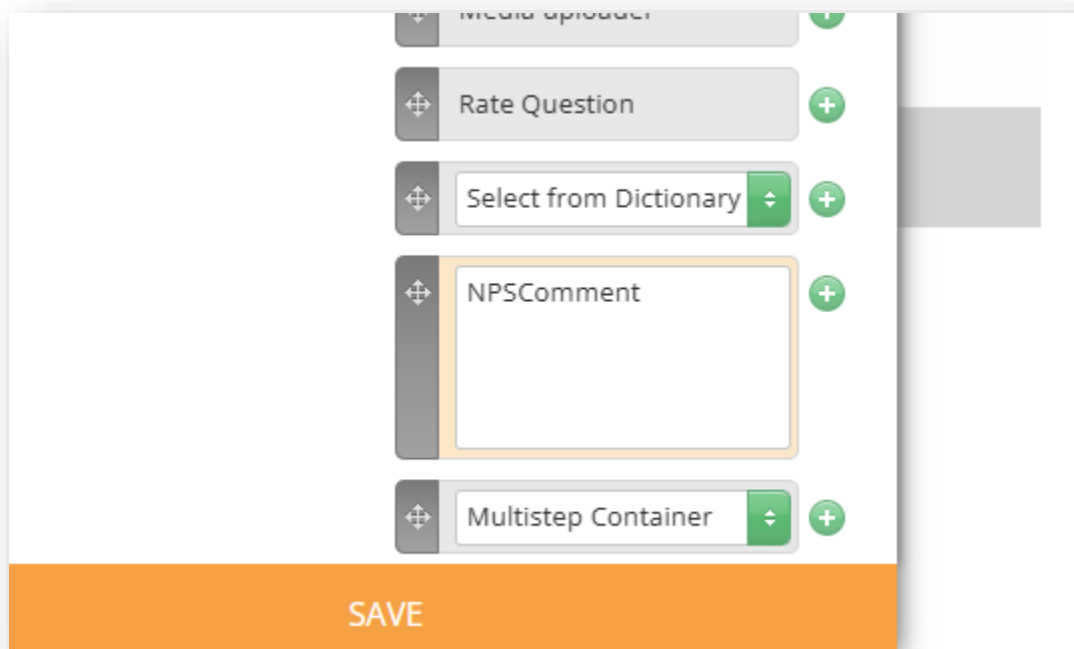
1. When adding Rate or Select from Dictionary, there is a checkbox asking “Add a comment connected to this question”. If it is checked, after saving there should be an automatically added NPS Comment, no additional action needed;



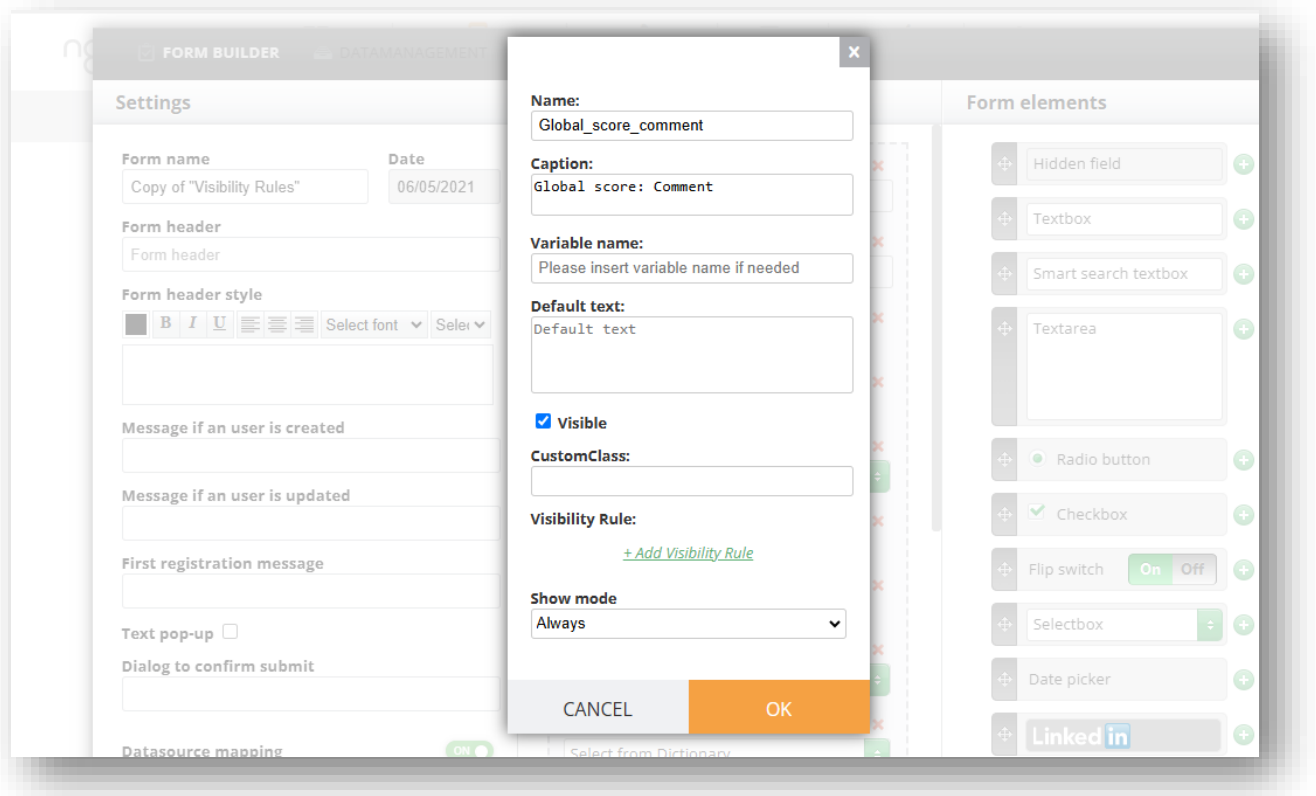
2. If Rate and Select from Dictionary have been added previously and now you need to add a comment to them, here (shown on the screenshot) click this icon When it is colored, the comment connected to this question exists, when it's grey - it does not exist;



3. If this element is selected without creating a question before that, just connect it to the first question available;

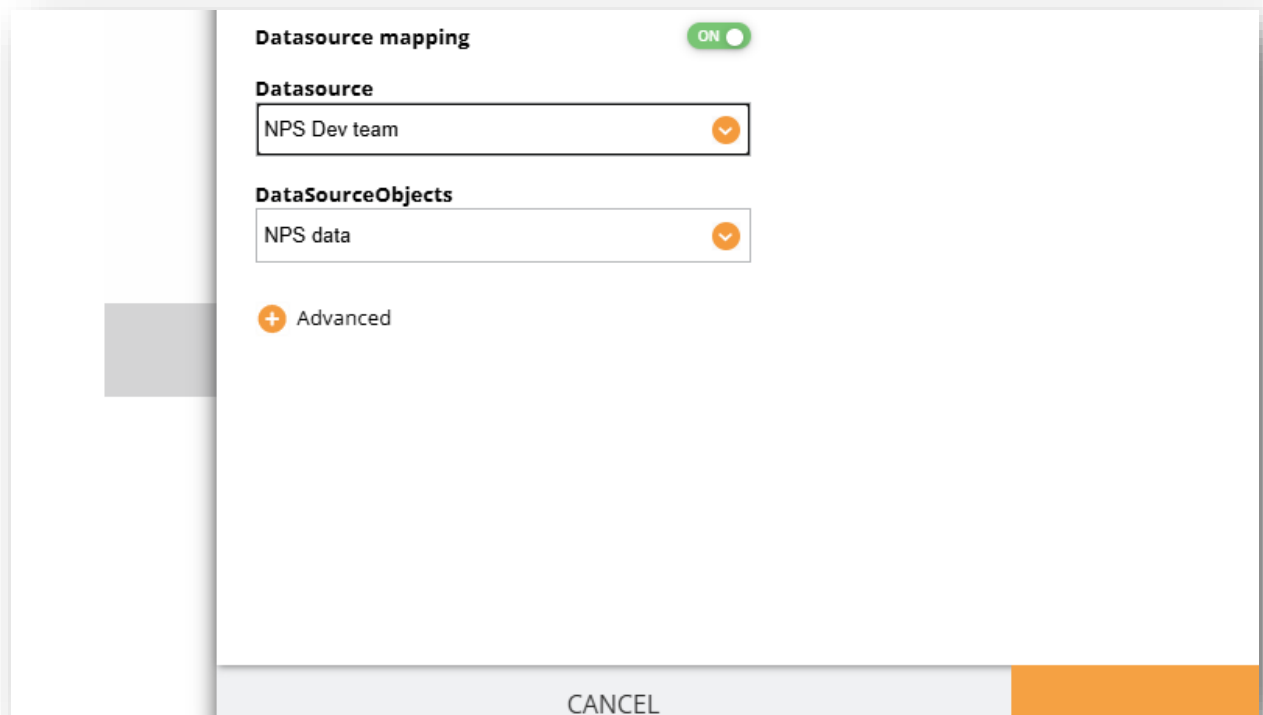


- It will have the same name and caption as its parent element, but with the next changes, the name will have a “: Comment” added and the caption will have “_comment” added. For example, NPS Q with the name “NPS_Score” and the caption “Would you recommend our services to your friends?”. The comment element will have the following values: name “NPS_Score_comment” and the caption “Would you recommend our services to your friends Comment?”



But the Name and the Caption are customizable;

- Cannot be added unless Datasource Mapping is enabled and Rate or Select from Dictionary are added to the form.



Here you can enable mapping

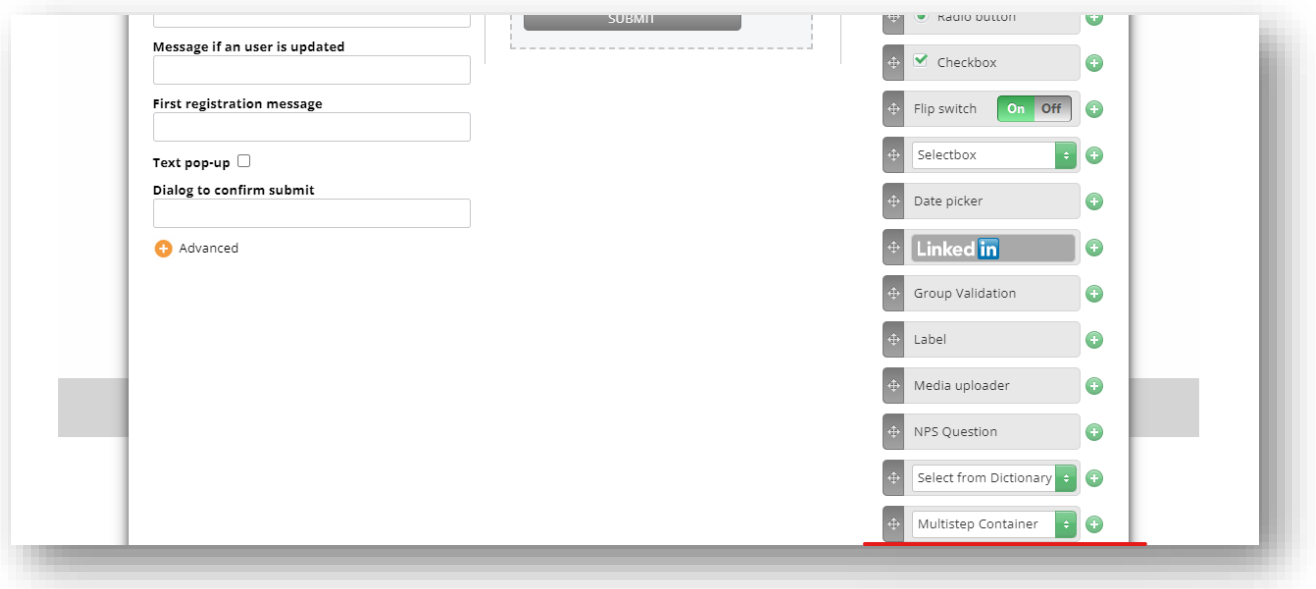
- This element also has required (mandatory) * option;
- And Visibility Rules can be applied to it;

There is no need to add comments in Dashboard

MultiStep Container

1. Adding a Container

When creating a form, click on MultiStep Container. If your form is new, you can just click on “plus” button and the element will appear in the form.

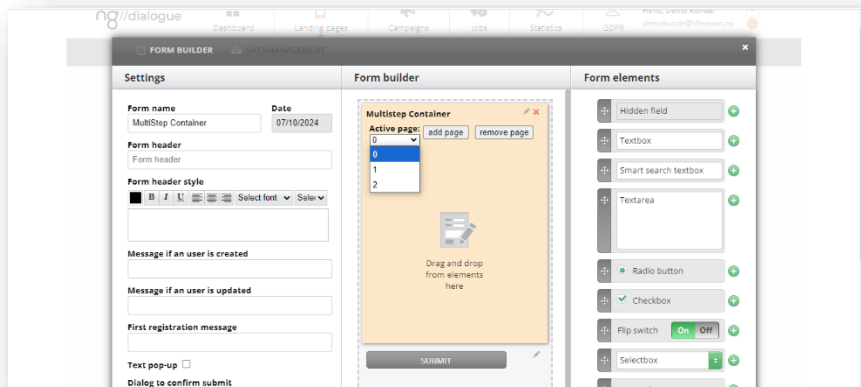


If the form already has some content, it is recommended to scroll to the place you need to add your Container and only then Drag&Drop the element:

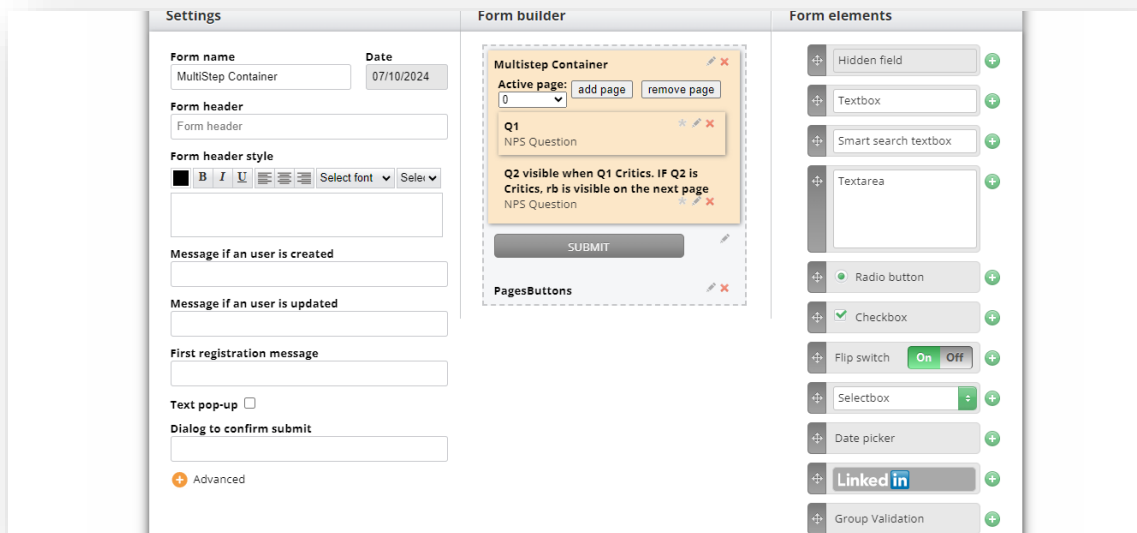
2. Adding Steps

Count starts with 0.

The flow is: add pages, delete them and drag&drop needed elements inside.



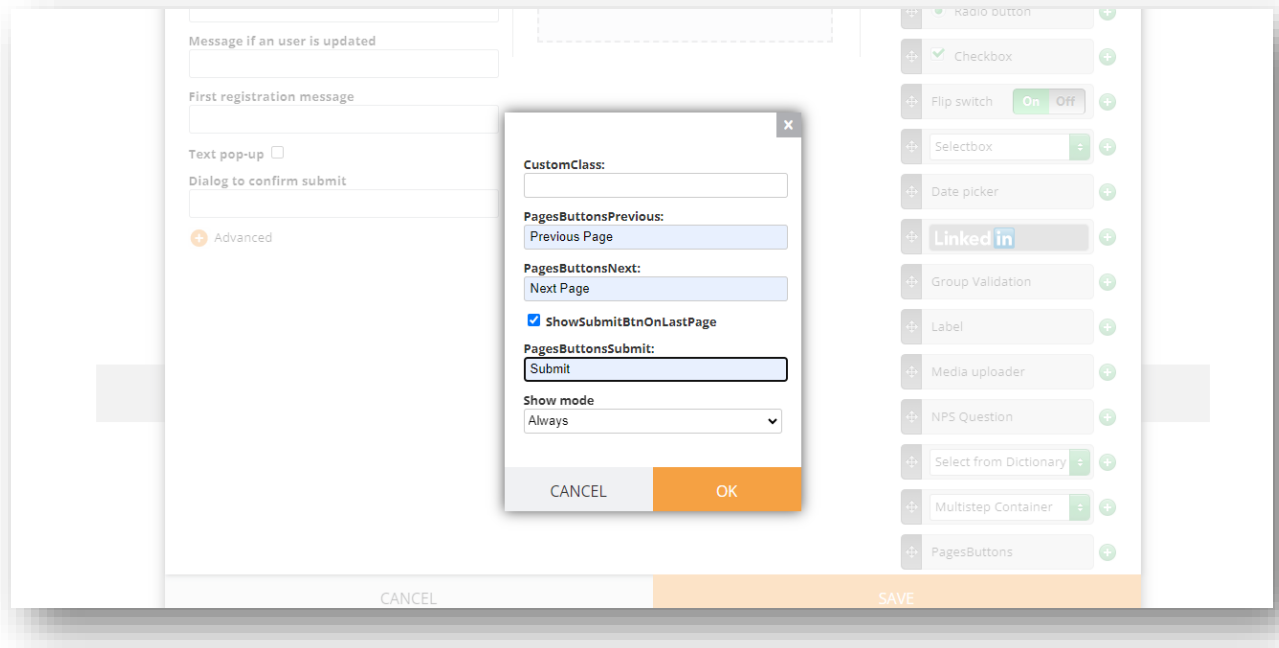
Make sure Submit button does not get inside the container, the logic won't work



The work with elements in Container is the same as without: add elements, name them, add Visibility Rules (works between elements located on different Steps), map in Advanced etc.

3. Buttons

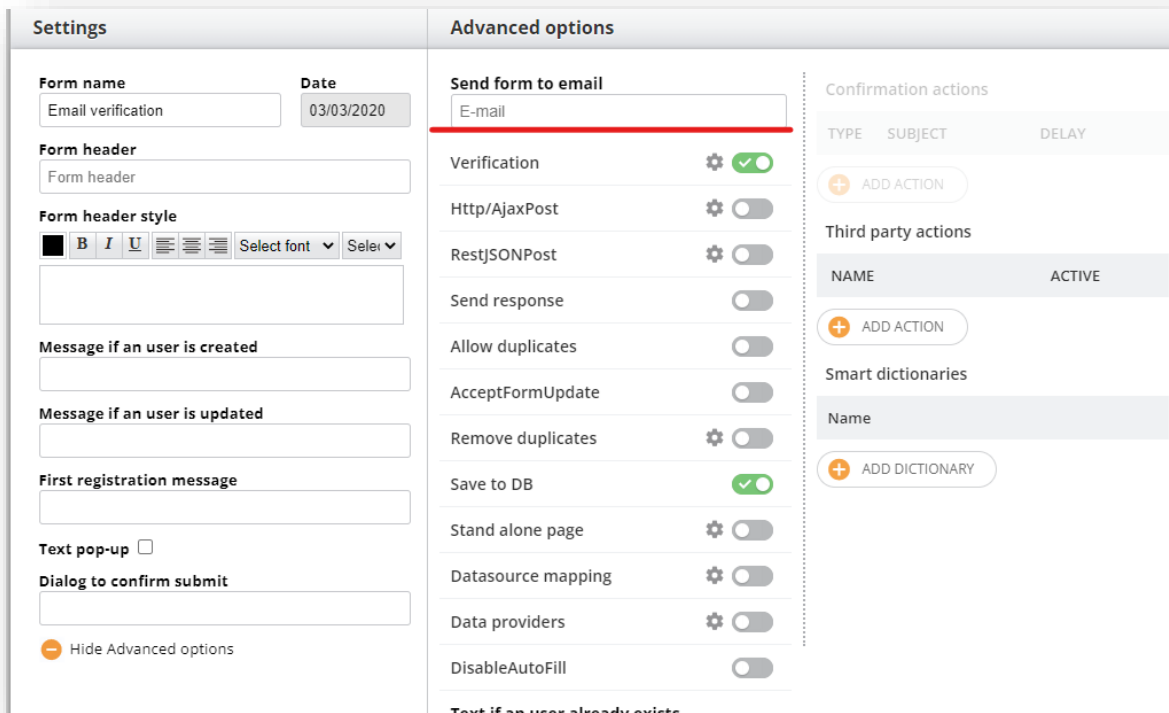
If you need Submit button not be shown on every step, just on the last one and there to be Previous and Next buttons, add this element. It becomes visible, when you add the Container. Here is its popup:



Form's Advanced Settings

Send to form

If a customer wants to receive a notification when form is submitted and what info was provided, you can type customer's email addresses in this line:

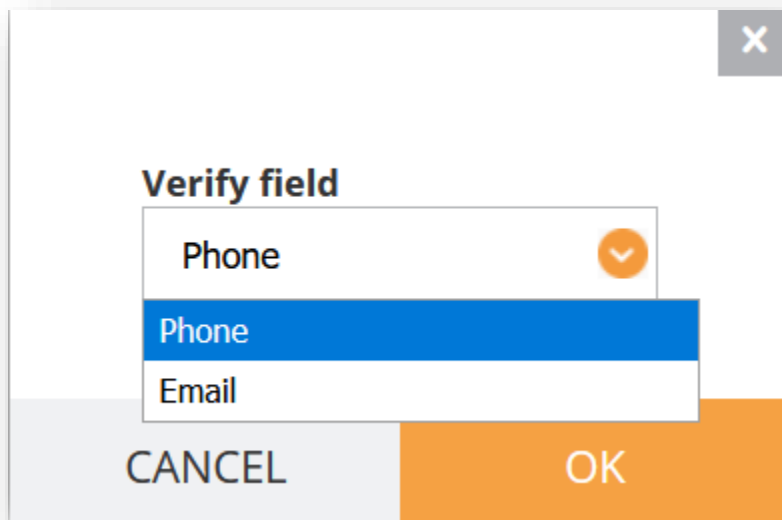


| Settings | | Advanced options | |
|---|---------------------------|---|--|
| Form name Email verification | Date 03/03/2020 | Send form to email E-mail | |
| Form header Form header | | Verification <input checked="" type="checkbox"/> | |
| Form header style [Rich text editor] | | Http/AjaxPost <input type="checkbox"/> | |
| Message if an user is created [Text area] | | RestJSONPost <input type="checkbox"/> | |
| Message if an user is updated [Text area] | | Send response <input type="checkbox"/> | |
| First registration message [Text area] | | Allow duplicates <input type="checkbox"/> | |
| Text pop-up <input type="checkbox"/> | | AcceptFormUpdate <input type="checkbox"/> | |
| Dialog to confirm submit [Text area] | | Remove duplicates <input type="checkbox"/> | |
| <input type="checkbox"/> Hide Advanced options | | Save to DB <input checked="" type="checkbox"/> | |
| | | Stand alone page <input type="checkbox"/> | |
| | | Datasource mapping <input type="checkbox"/> | |
| | | Data providers <input type="checkbox"/> | |
| | | DisableAutoFill <input type="checkbox"/> | |

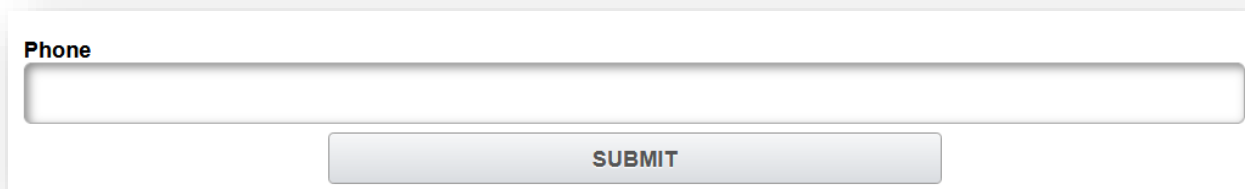
Verification

Verification feature allows you to set up verified access to your global form. If the verification is enabled, a user won't see the global form until passing verification. Access can be implemented in several ways.

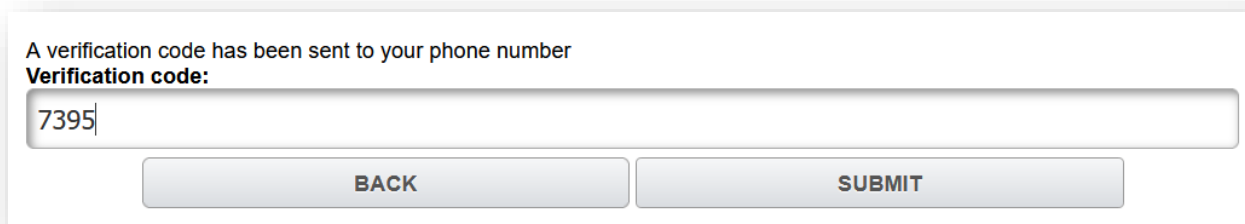
Enable the verification and the following dialog will appear.



After you set the field, access to the form will be granted only after passing the verification.



After you fill in the phone number or email, you will get a verification code.



After submitting it, you will get access to the form.

It is important to set up verification especially when we send responses for each form record as we might get a spam attack.

Send Response

This feature will allow your recipients to get a response after they submit their data (for example, they have negative experience, and you would like to send a follow-up email or SMS asking them to provide additional info).

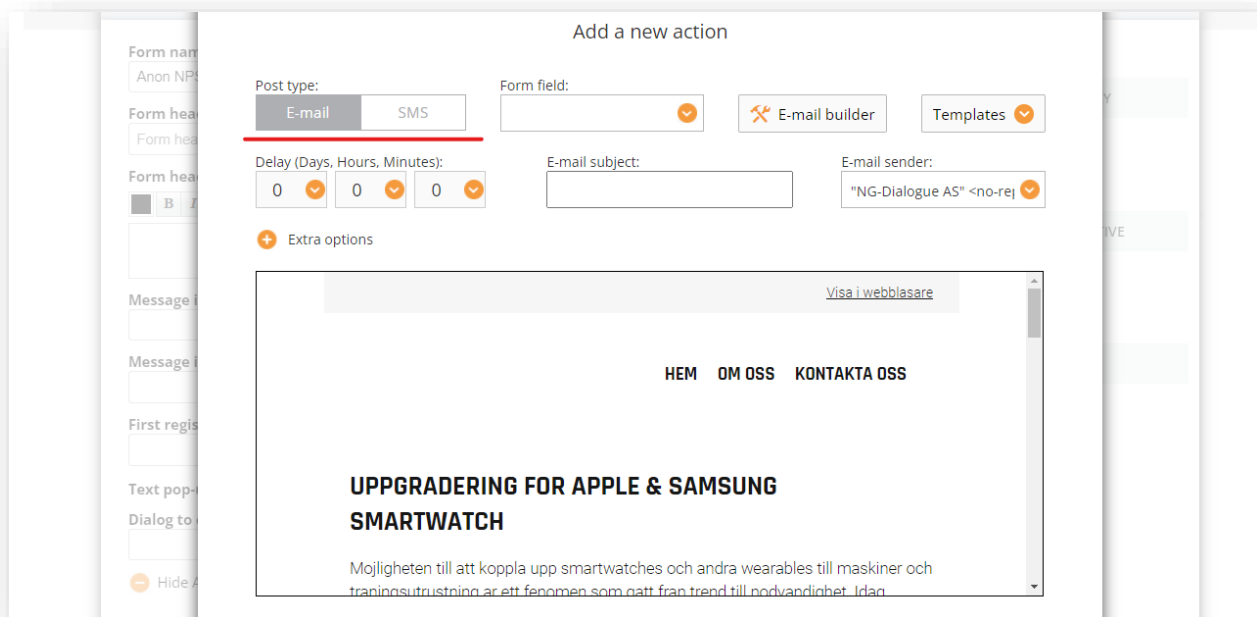
The screenshot shows the configuration interface for a form. The 'Send response' option is highlighted with a red underline and a green checkmark, indicating it is enabled. Other options include 'Verification', 'Http/AjaxPost', 'RestJSONPost', 'Allow duplicates', 'AcceptFormUpdate', 'Remove duplicates', 'Save to DB', 'Stand alone page', 'Datasource mapping', 'Data providers', 'DisableAutoFill', and 'EnableCaptcha'.

Enabled send response allows you to set up confirmation actions listed below:

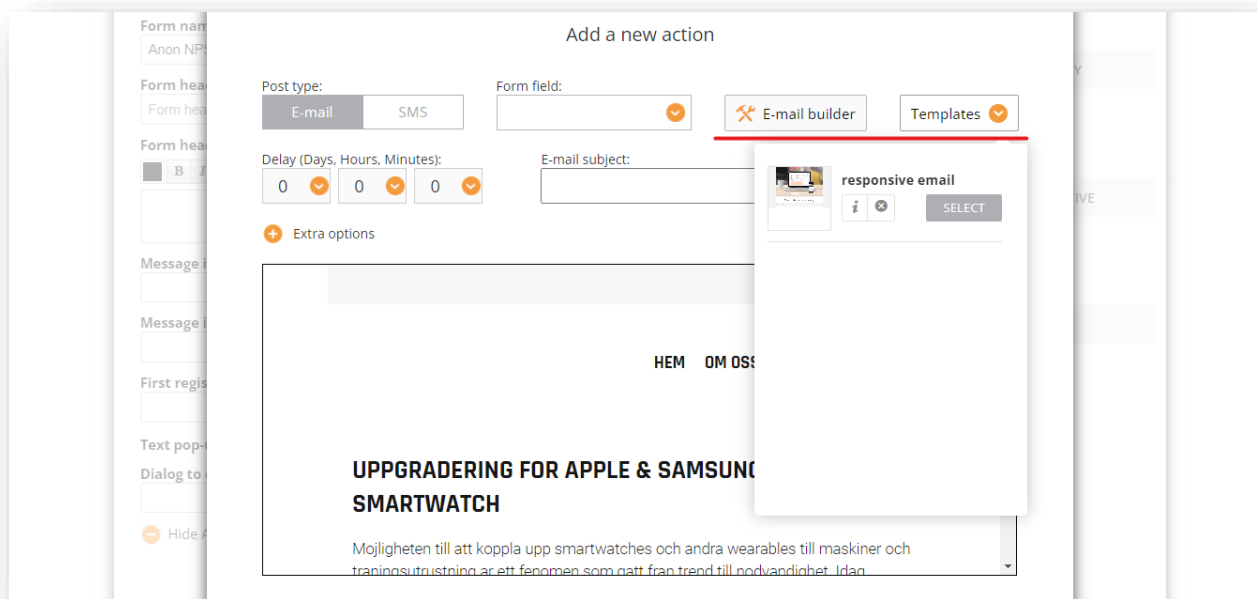
The screenshot shows the 'Confirmation actions' section of the configuration interface. It features a table with columns for 'TYPE', 'SUBJECT', and 'DELAY'. Below the table is an 'ADD ACTION' button. The 'Send response' option in the left sidebar is also highlighted with a red underline and a green checkmark.

You can set up several SMS/Email confirmation actions by clicking + sign

Choose post type, the form field is a field that stores the phone number of the user:

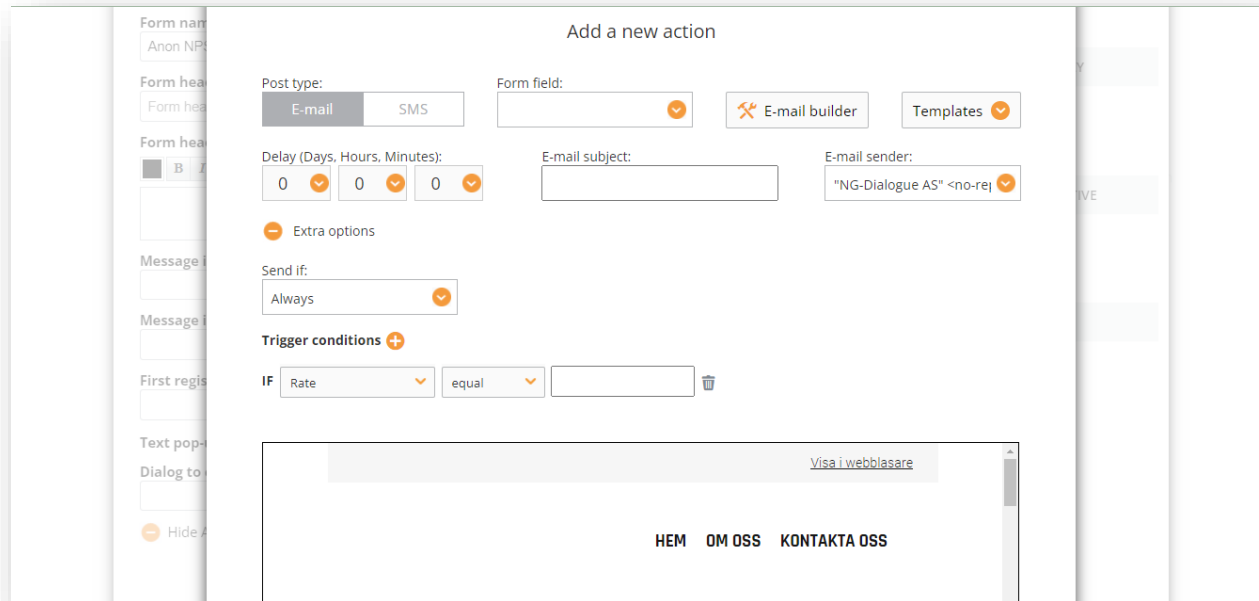


You can choose text from the templates or type the new one



Click Email Template to create a new one or Templates to choose among existing ones

Also, you can add some **extra options** like **Send if** and **Trigger conditions**



In case you choose one of the **Send if** conditions, a user gets a message in the following cases:

- if a new record: a user doesn't exist in datasourse
- if an updated record: a user's phone number already exists
- If first registration

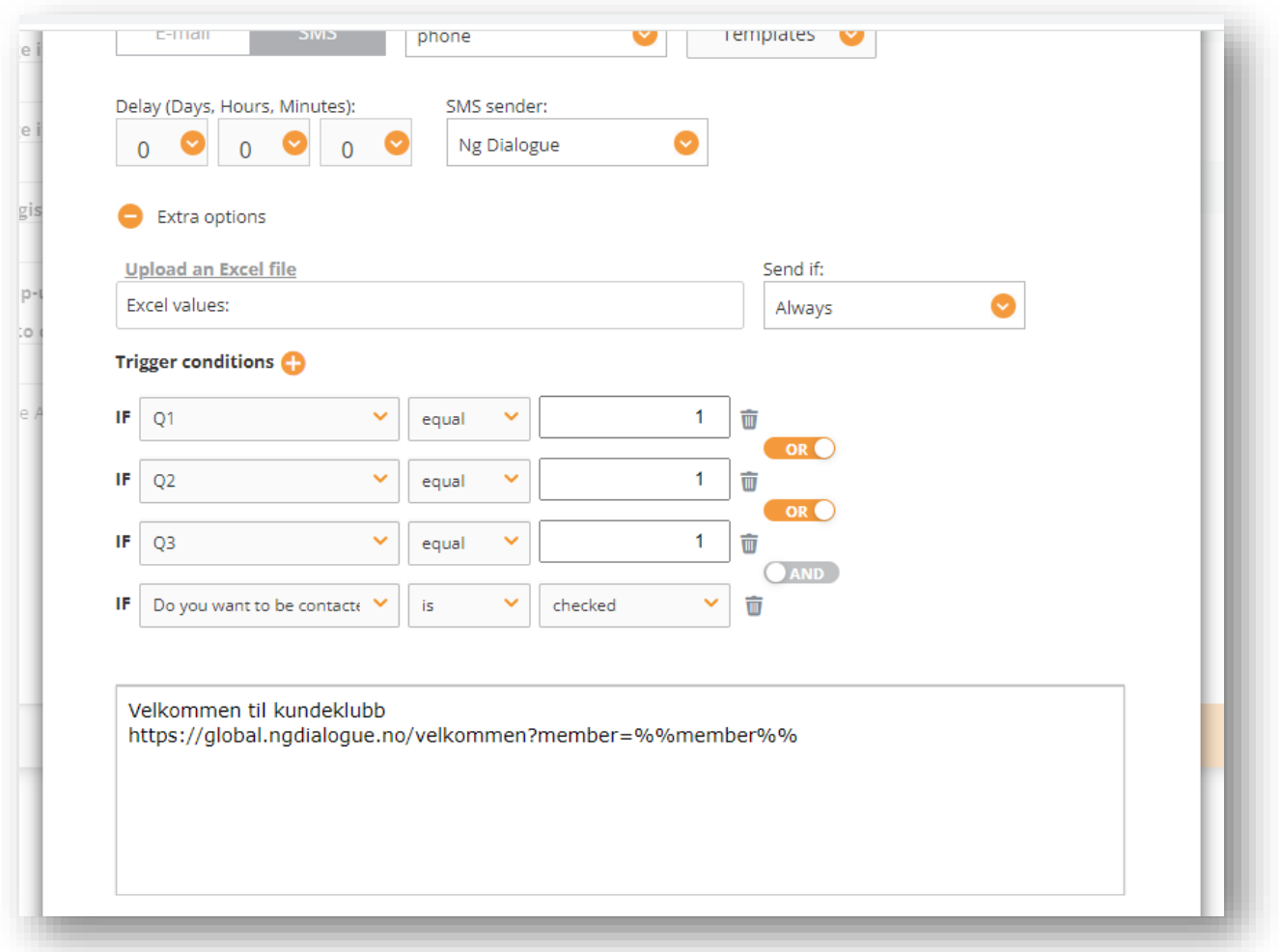
We support emojis 🙋🏻👉🌱😊

Send Response "OR" condition

Use case:

1. User creates a form with several questions
2. User adds Response actions with trigger conditions
3. Check box is checked
4. One of questions has rate equal X (e.g. 3)

- When form is posted, if user checked checkbox and one or more questions have selected value X, response is sent



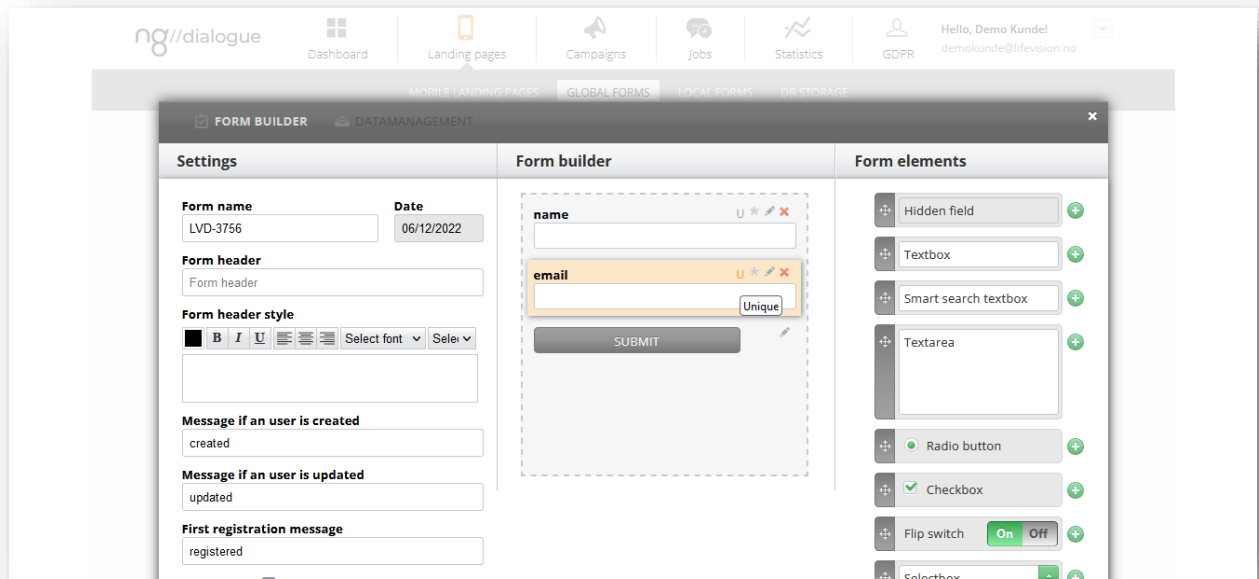
The screenshot shows a configuration interface for a message campaign. At the top, there are tabs for 'E-mail', 'SMS', and 'phone', with 'SMS' selected. Below the tabs, there are fields for 'Delay (Days, Hours, Minutes):' (0, 0, 0) and 'SMS sender:' (Ng Dialogue). A section titled 'Extra options' contains an 'Upload an Excel file' button and a 'Send if:' dropdown set to 'Always'. The 'Trigger conditions' section lists four conditions: 'IF Q1 equal 1', 'IF Q2 equal 1', 'IF Q3 equal 1', and 'IF Do you want to be contact is checked'. The first three conditions are connected by 'OR' buttons, and the fourth is connected by an 'AND' button. At the bottom, there is a text area containing the message content: 'Velkommen til kundeklubb' and the URL 'https://global.ngdialogue.no/velkommen?member=%%member%%'.

Accept form update

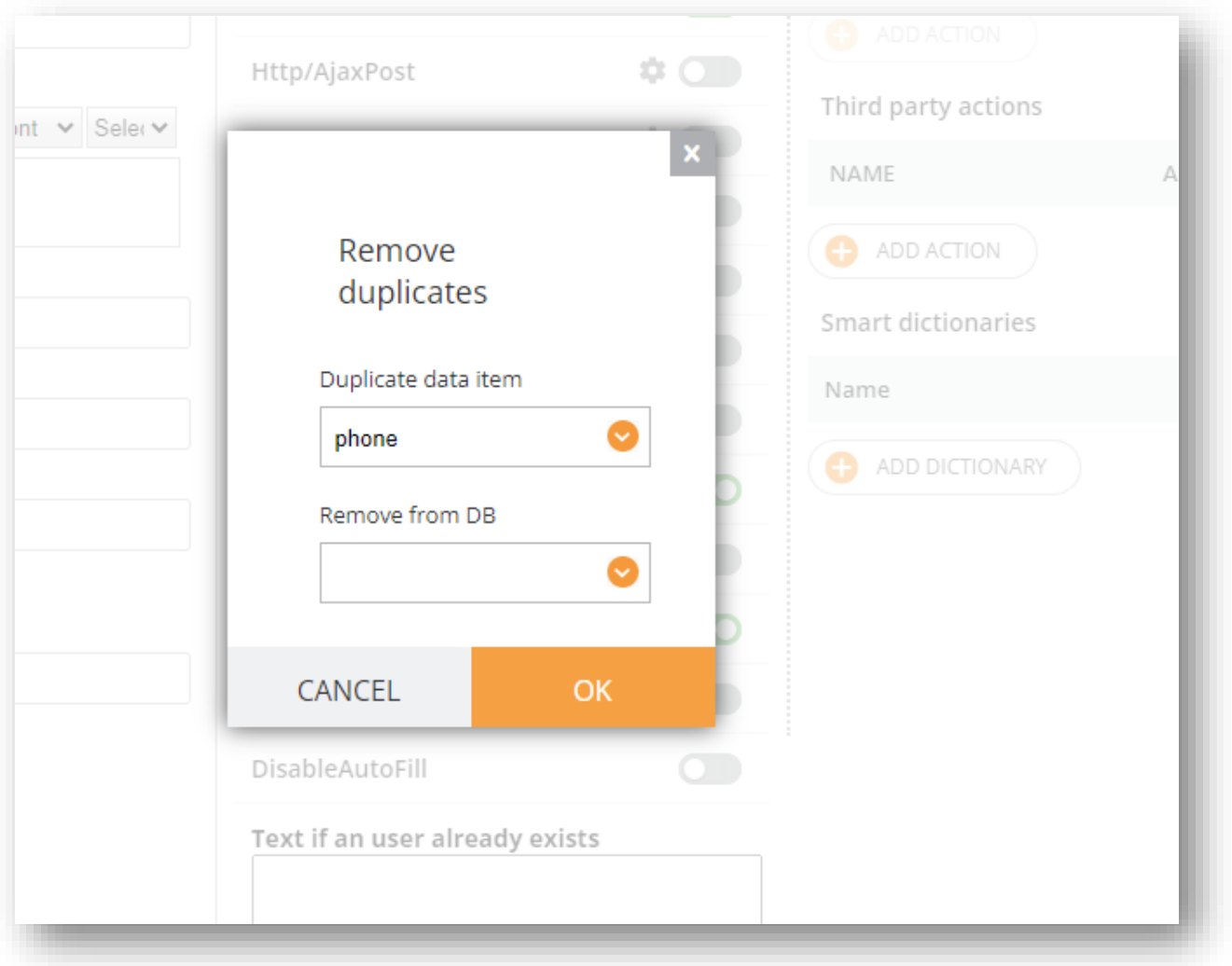
If this option is enabled, a user can update form information instead of creating duplicates. "Allow duplicates" works the opposite way.

NB!

For this logic to work, you need to **mark email/phone field unique**, and you should see form updates.



Remove duplicates



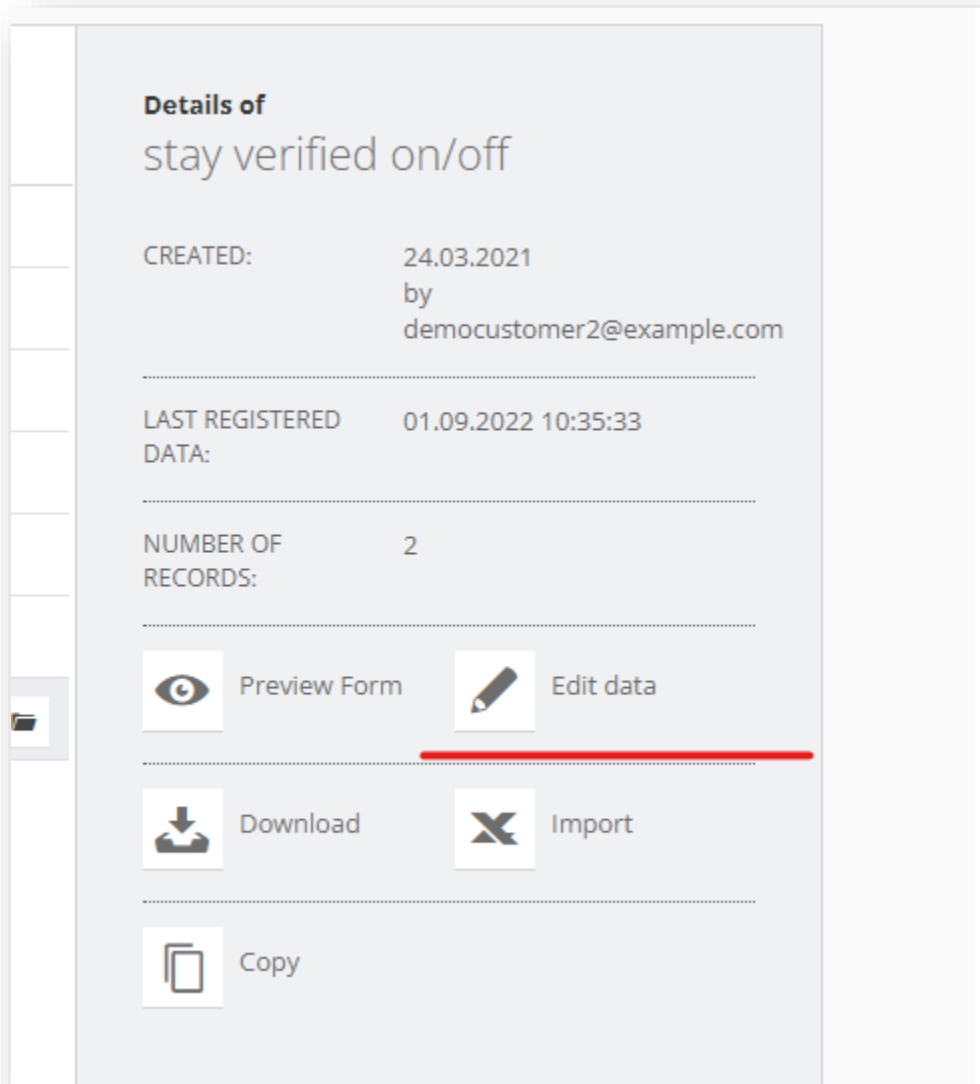
You can choose an item that will be deleted in case there is more than one response provided.

Disable AutoFill

Does not let the form be prefilled, all the fields appear empty to the member.

Save to DB (database)

This feature is enabled by default. The data is stored in the form (form works as data base, data storage) and can be found here:



Use case: you are using datasource and there is no need to store data in the form, you can disable it. To check what is datasource.

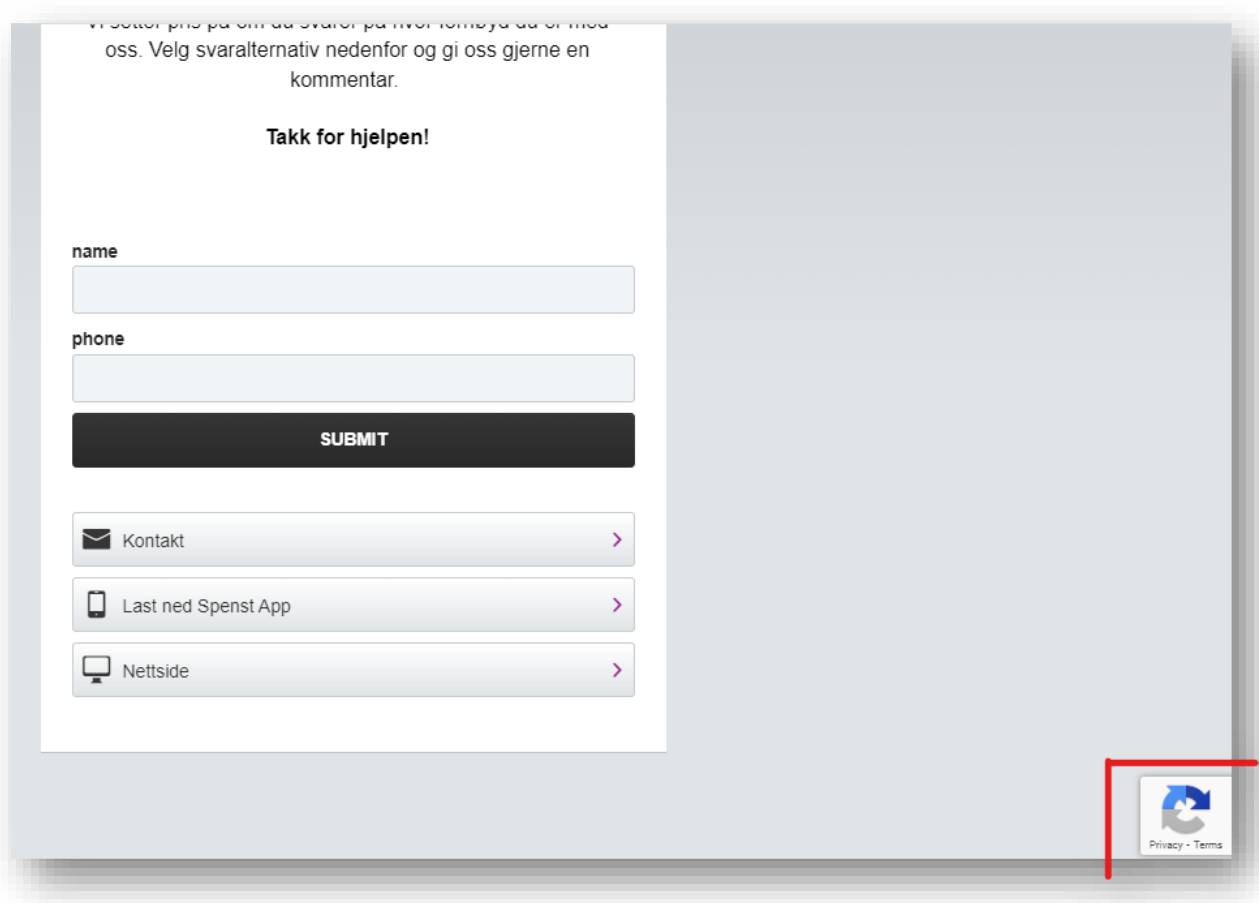
Datasource mapping

Datasource mapping is the way to connect form fields with a form in an existing database.

Enable CAPTCHA

This feature is enabled by default now in all forms.

CAPTCHA lets you filter spam form post form:




Vi setter pris på om du svarer på hver tomme du er med oss. Velg svaralternativ nedenfor og gi oss gjerne en kommentar.


Takk for hjelpen!


name


phone

SUBMIT

 Kontakt >

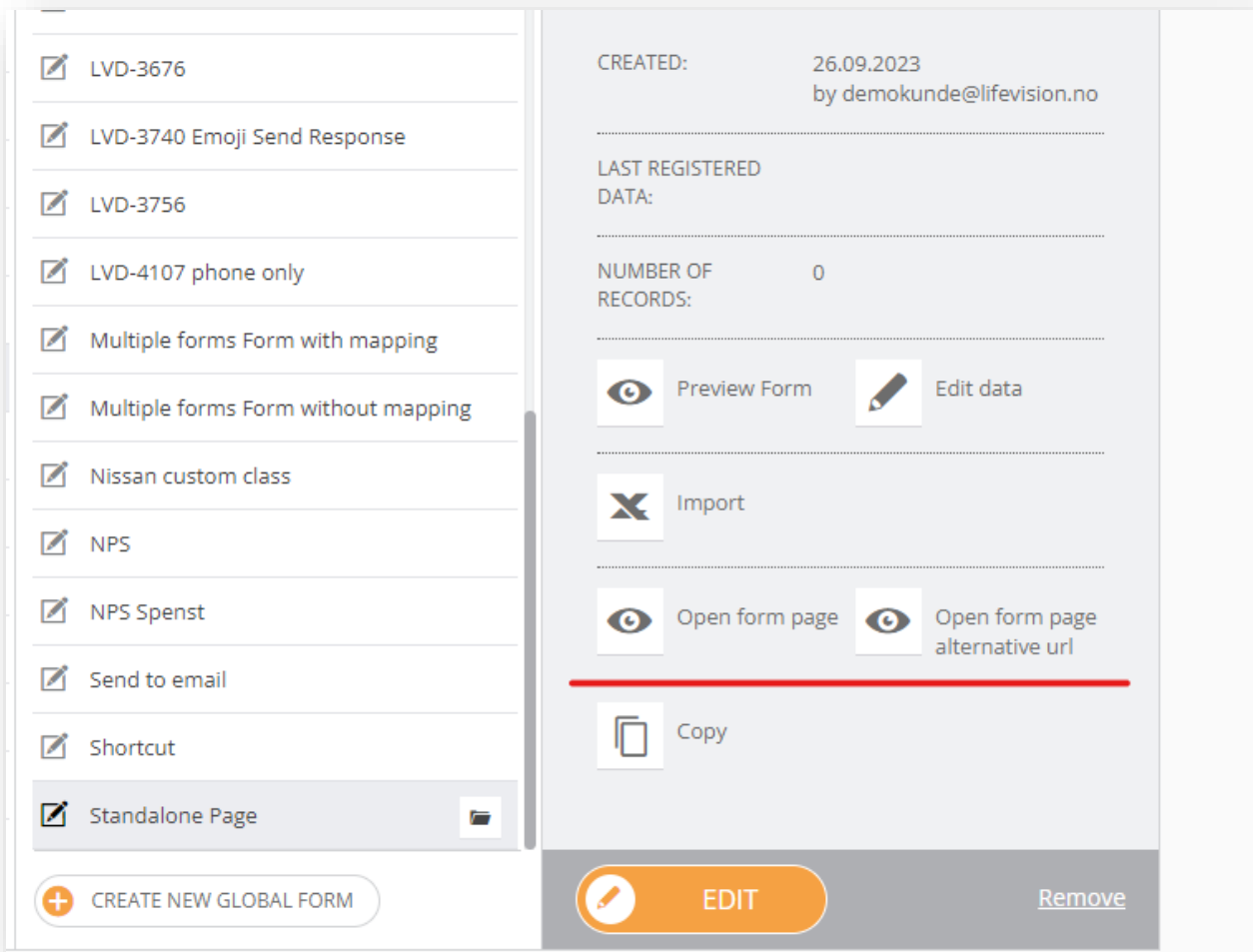
 Last ned Spent App >

 Nettside >

 Privacy - Terms

Standalone Page

Lets you open a form as a separate web page



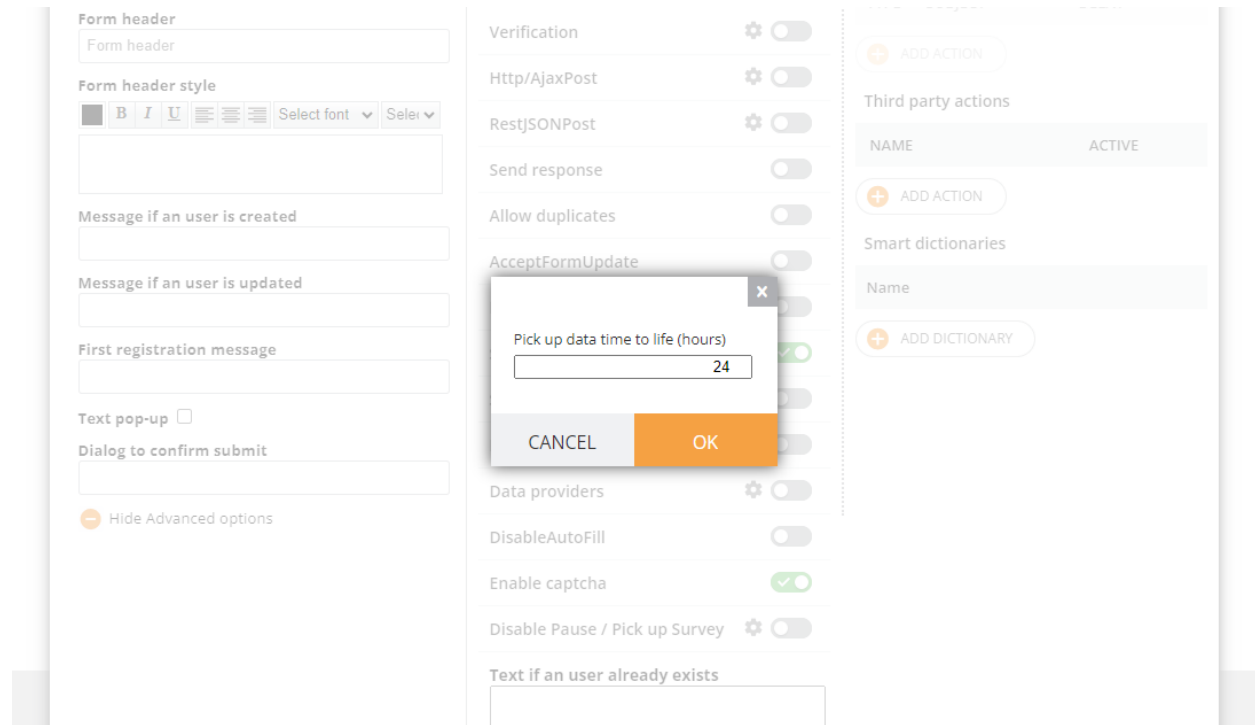
Pause/Pick Up Survey

Being able to close and open the Survey and continue where ended.

So, if you have 10 questions, and only answer 2 of them, then close the browser or tab, coming back in a couple of hours accessing the survey via link or else, it will be picked up where you left it.

For now it only works in one device

By default, this feature is enabled



You can also set up time-to-live for the saved data (default save time is 24 hours)

Campaigns

How to create a campaign

In the campaigns tab, choose an existing folder or create a new one where your campaign will be placed. With pressing 'new campaign' button, the dialogue of creation appears.

NB! Please do not refresh the page while you are creating your campaign

1. Type & Receivers

The screenshot shows the 'TYPE & RECEIVERS' step of a campaign creation wizard. The interface is divided into several sections:

- Progress:** 1 TYPE & RECEIVERS (active), 2 CONTENT, 3 SCHEDULE, 4 SUMMARY.
- Campaign type:** Includes buttons for SMS (selected), E-mail, E-mail and SMS, and Social.
- SMS Blacklist:** A dropdown menu set to 'Global' with a note '1 entries in 1 blacklists'.
- Receivers:** A 'Country code' dropdown set to 'Norway' with a note: 'Define a country code. It's used for proper operating phone numbers. For example, +47 for norway etc.'
- Phone Numbers:** A large text area for 'Copy and paste phone number here:' with a note: '* Phone numbers must be separated by comma'.
- GDPR:** 'Collection' and 'Filtering' sections, each with 'Off' and 'On' toggle buttons.
- Allow duplicates:** A toggle button set to 'Off' with a note: '* Enable / disable duplicates in recipients list'.
- Sender ID:** 'SMS sender:' dropdown set to 'Ng Dialogue' and 'SMS Time to Live:' dropdown set to '4 hours'.
- Source Selection:** 'From excel' (ADD EXCEL FILE) and 'From database' (CHOOSE DATABASE) buttons.

First of all, you need to choose a campaign type

- SMS Campaign sends SMS to the customers' phone numbers
- Email Campaign sends E-mails to the customers' e-mail addresses
- E-mail and SMS sends both e-mails and SMSs

If you choose the third type of campaign, you can also set a priority (SMS, Email, or both). The default setting is both which means that your customer receives both email and SMS. In case the SMS priority is chosen, the customer receives SMS if he has a phone number in his member's data and he receives email only if there is no phone number. With the Email priority, the customer receives SMS only in case there is no email address in his member's data.

F.A.Q.: If you send a combined campaign (both SMS and E-mail) and E-mail is the first priority: If an E-mail address is bouncing, will the system choose to send an SMS?

- No. The system wouldn't send an SMS in this case, because it decides what it should send (SMS or Email) before we can find out that email is bounced.

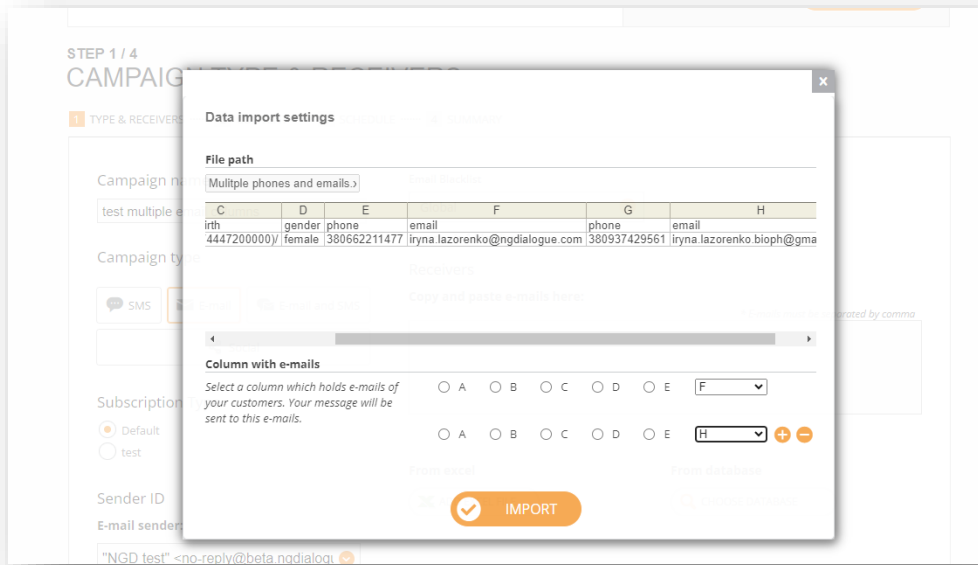
Input campaign name, check Sender ID and blacklist and input receivers of your campaign. There are three ways to do this:

Receivers

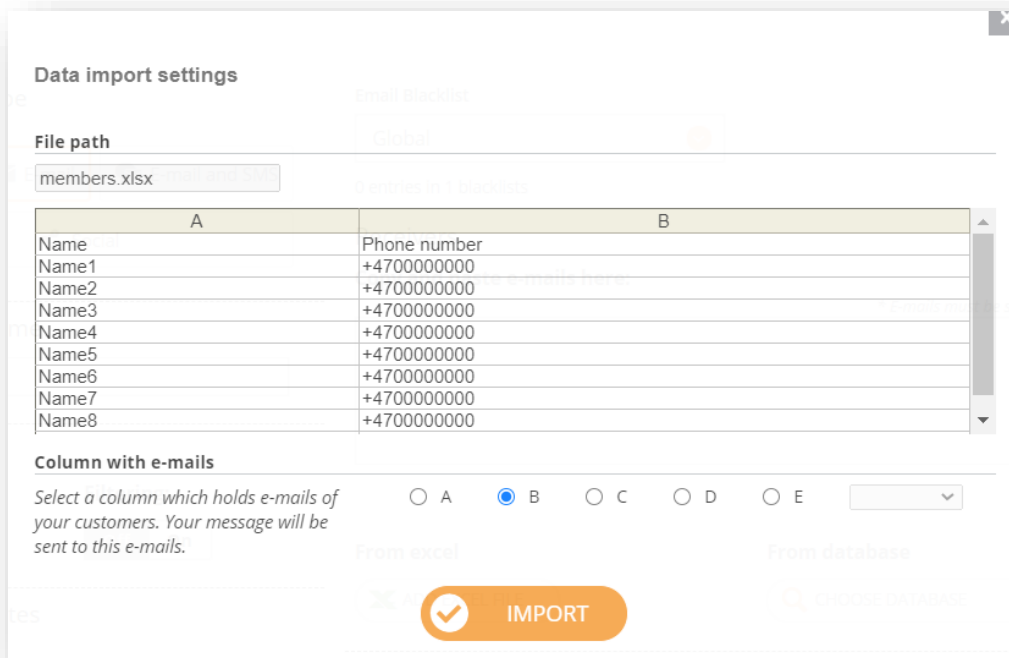
Manual Input

To add phone numbers or email addresses manually, you should enter or copy numbers to the field separated by comma. This case is usually used mostly for testing your campaigns.

1. Make sure the country code is correct. Please check this article regarding [SMS campaign and phone data](#).
2. Upload an Excel file



If your file contains more than 1 field with email/phone data, you can click “Add” button

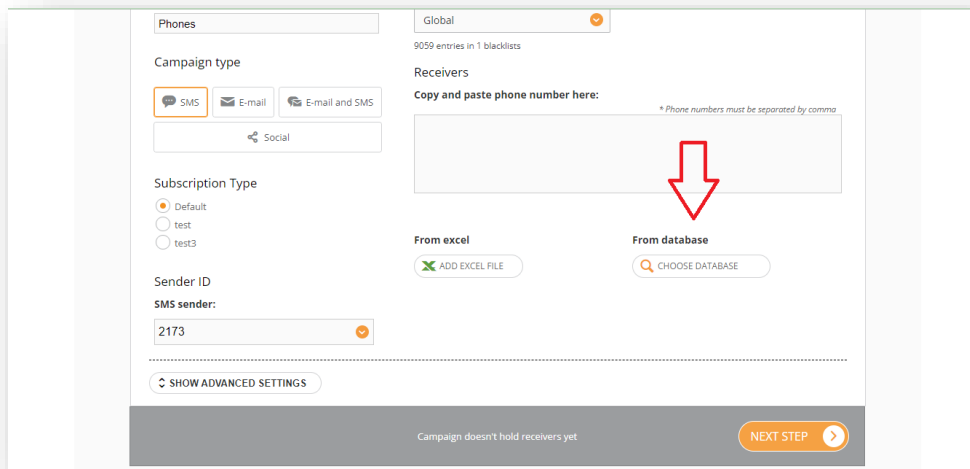


3. Choose a column with phone numbers or e-mails and press ‘import’ button.

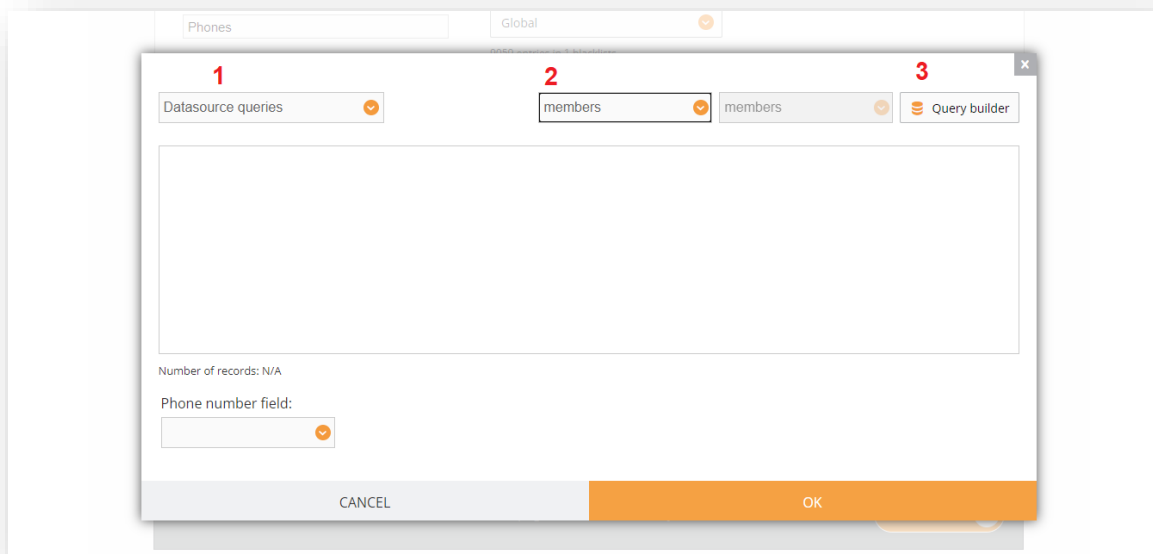
From database

Press 'Choose Database' button and in the upper left corner click on drop-down and choose Datasource queries

Click "from datasource"

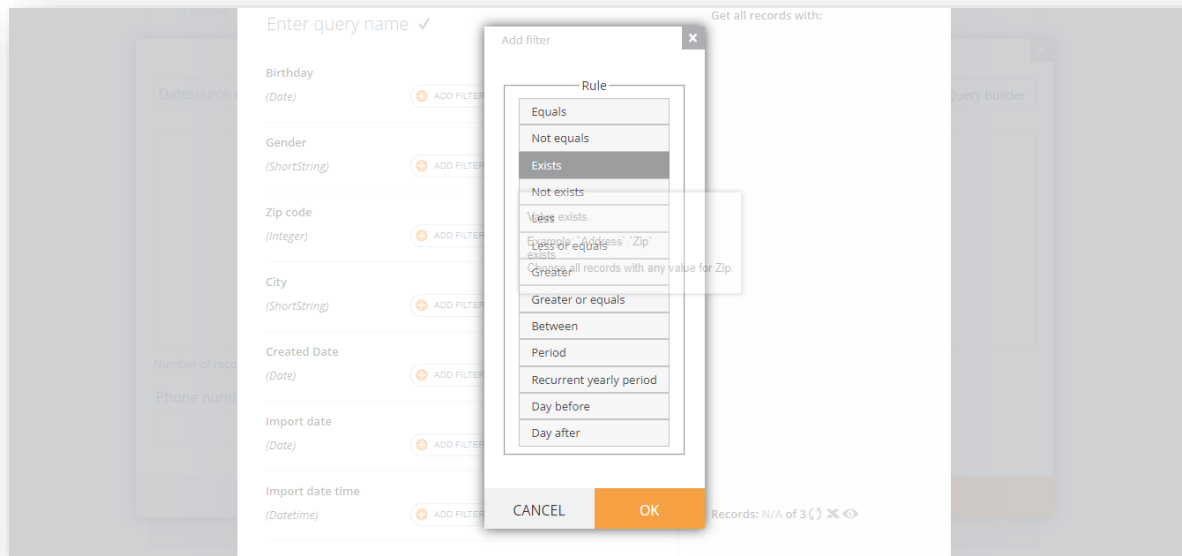


Choosing a datasource

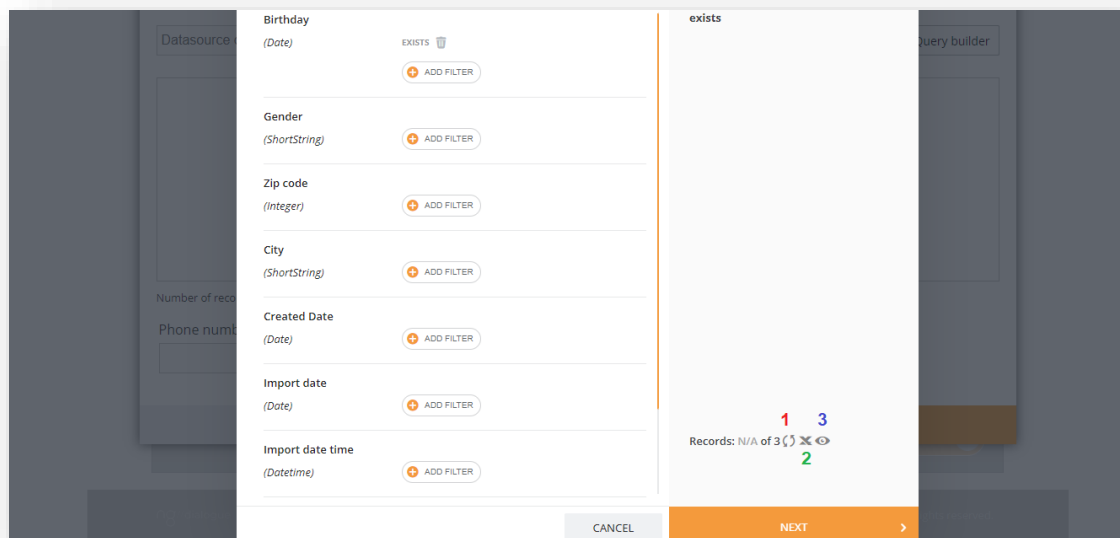


1 - select "datasource queries" 2 - choose your datasource 3 - click "query builder"

Filter your recipients

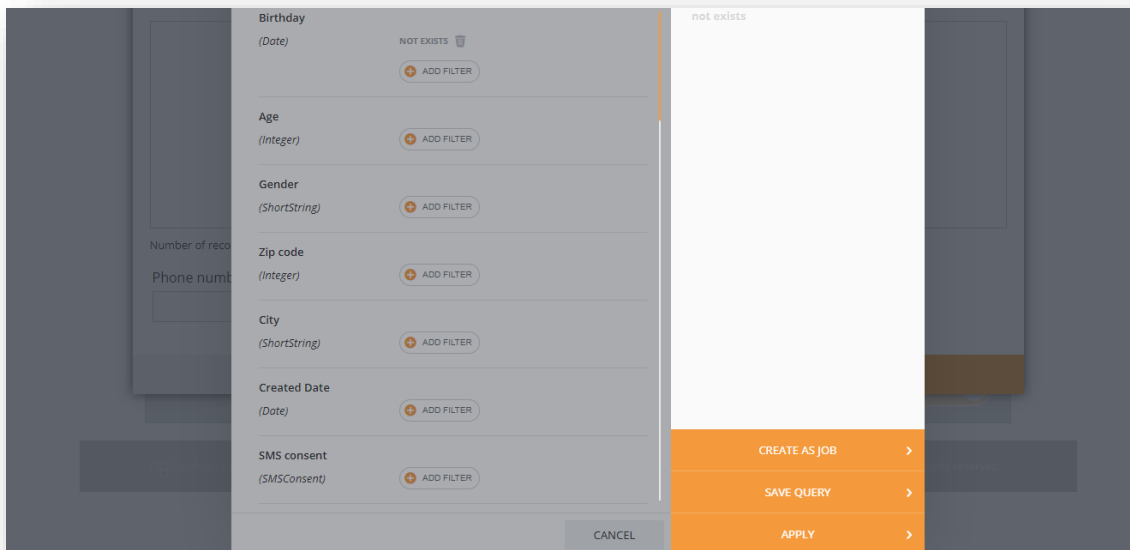


Refresh the list



1 - Refresh button 2 - download Excel file with filtered recipients 3 - see the recipients

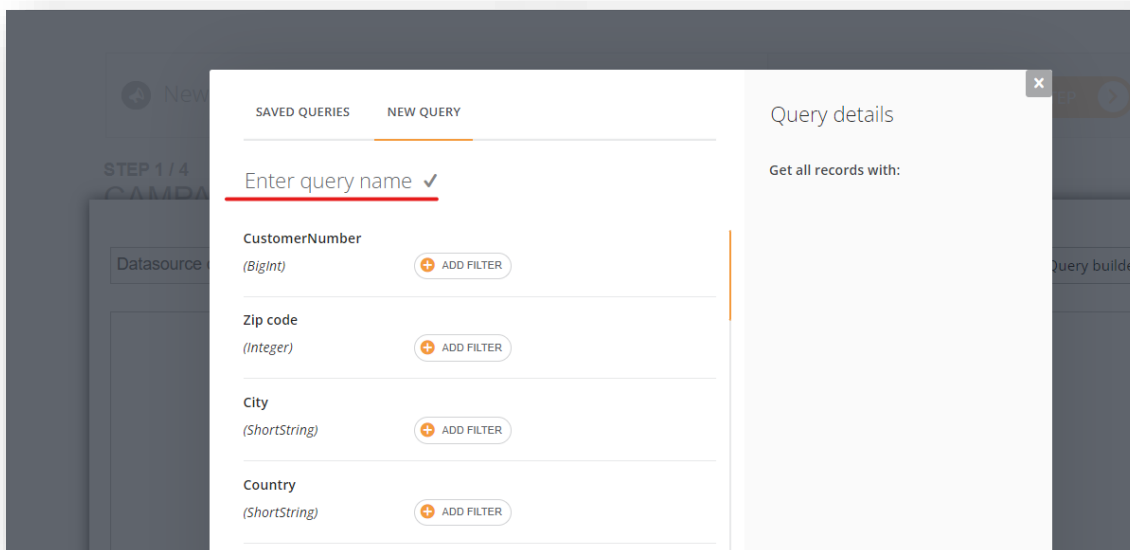
Select Apply



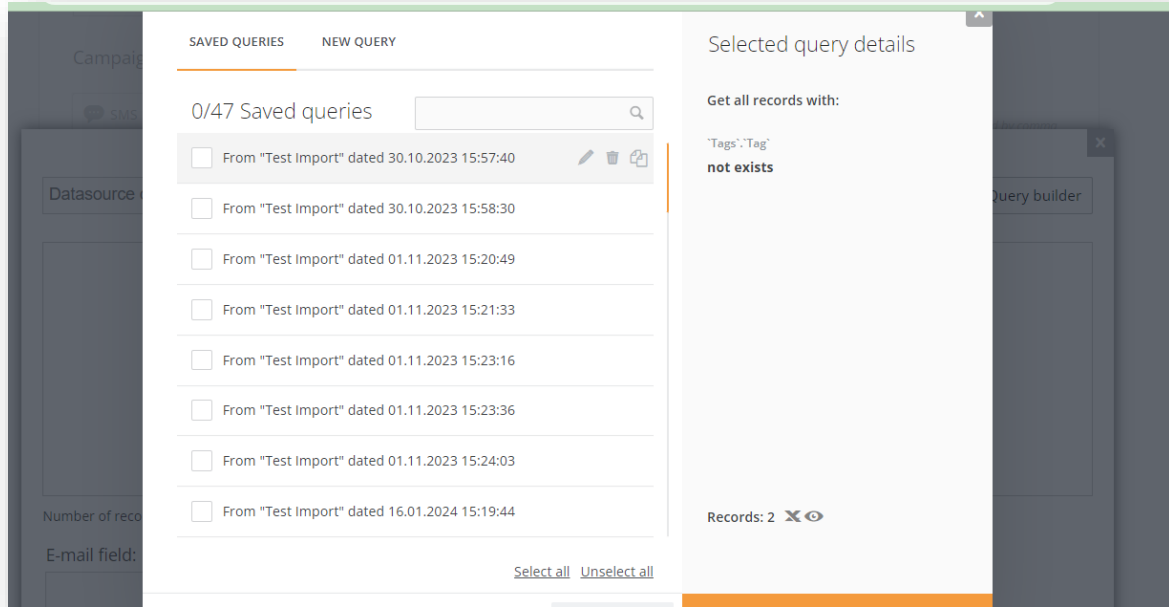
Apply - form recipients list for campaign Save Query - save filtered list for future use

To use Saved Queries

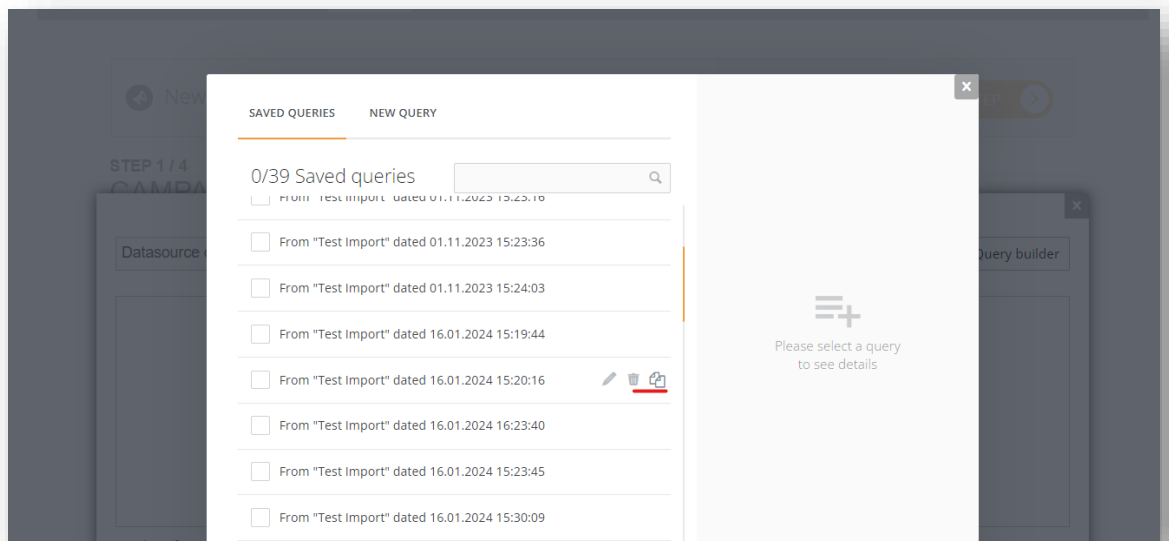
You can name your query, save and use later



Here you can find all the queries saved and also some that were created via API. To use the existing one, simply click on it:

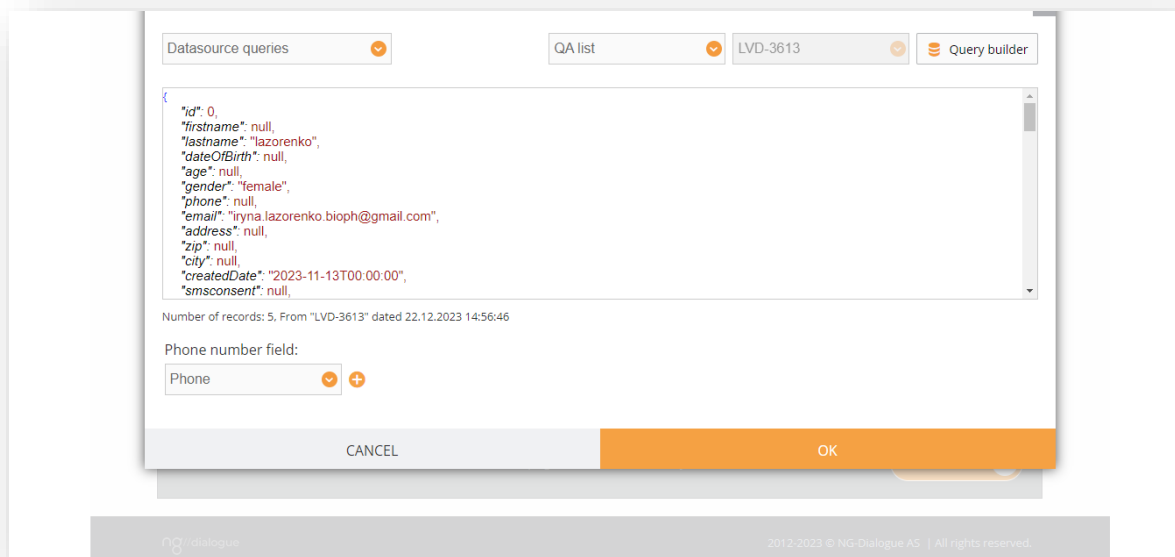


If you want to modify it, you can select it by ticking the box, and then you will see the options: edit the existing one, delete or copy (then you will be able to edit it). **Please note that some of the queries created via API if copied via UI (via this tool on the screenshot), won't work properly!**



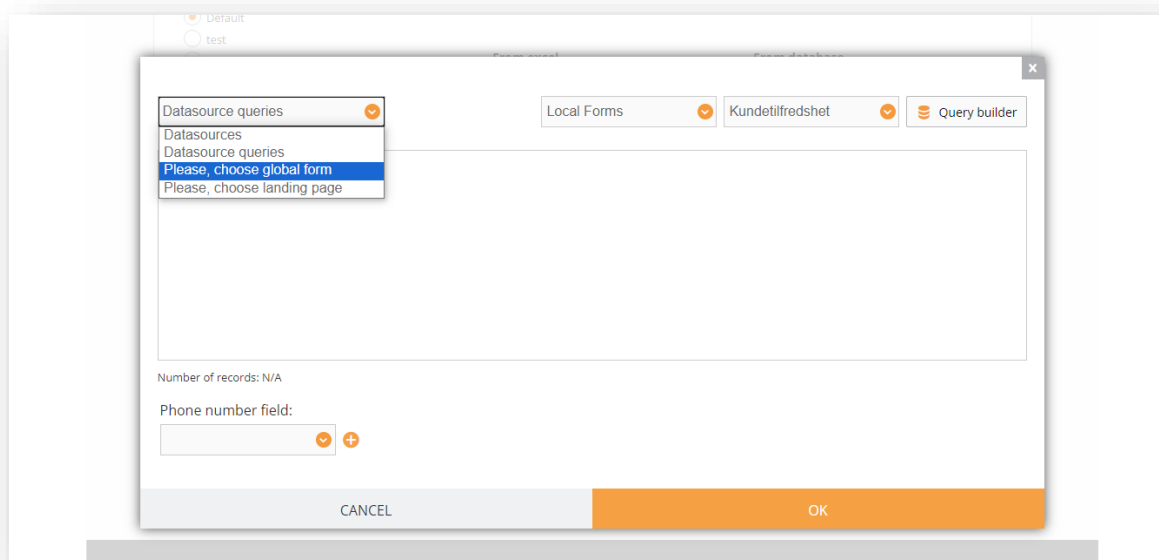
To apply saved query, click this button

Press OK

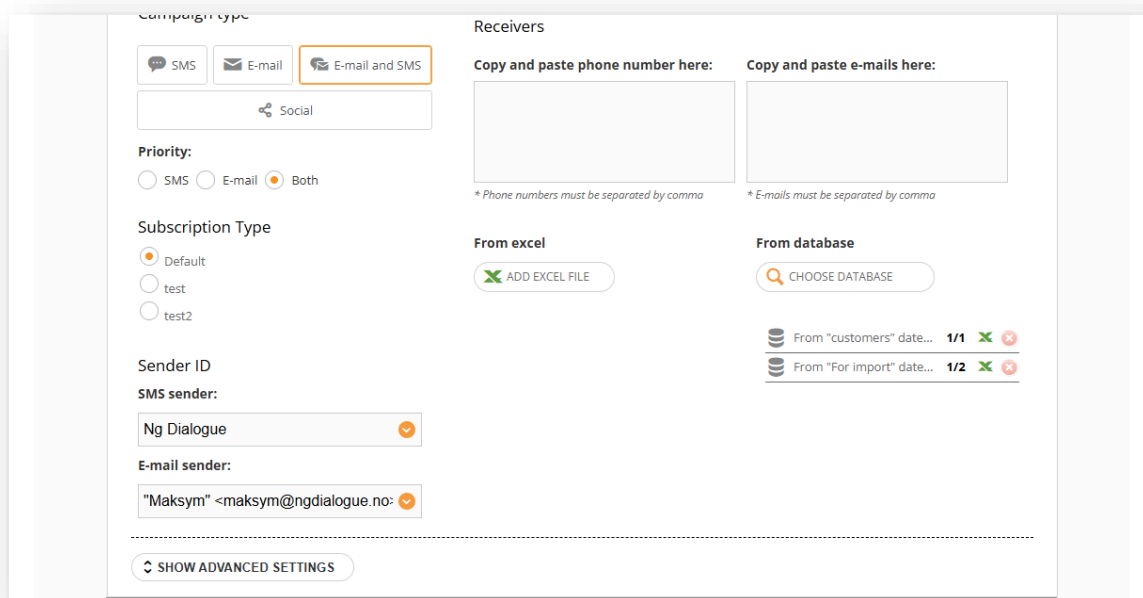


This window appear to double-check your recipients list and possibly re-assign phone field

Also, note that we can use a form or a landing as a datasource if you have data being stored there [How to use a form as a datasource:](#)



You can use more than 1 source for a campaign: input+excel+datasource or even more than 1 datasource (the same as database)

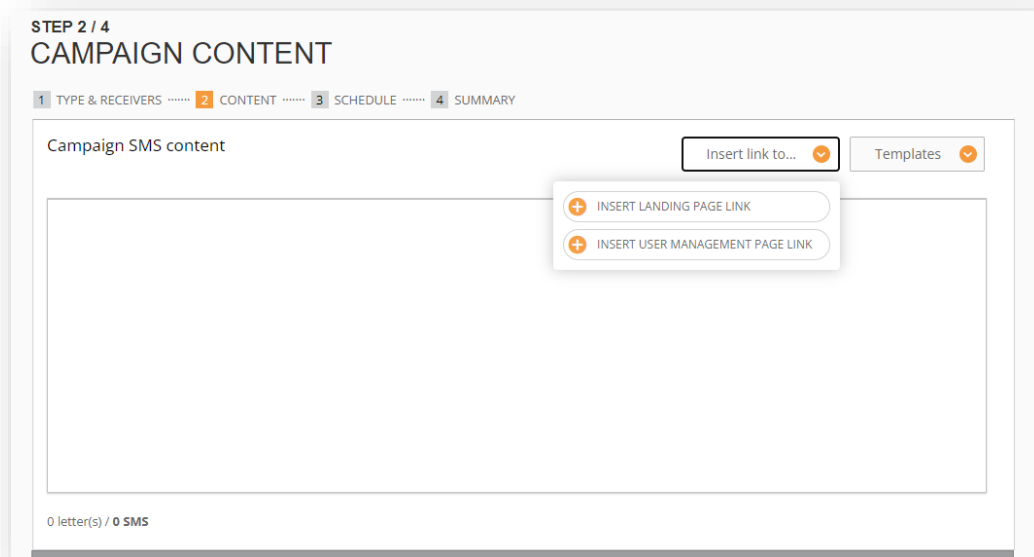


Advanced Settings

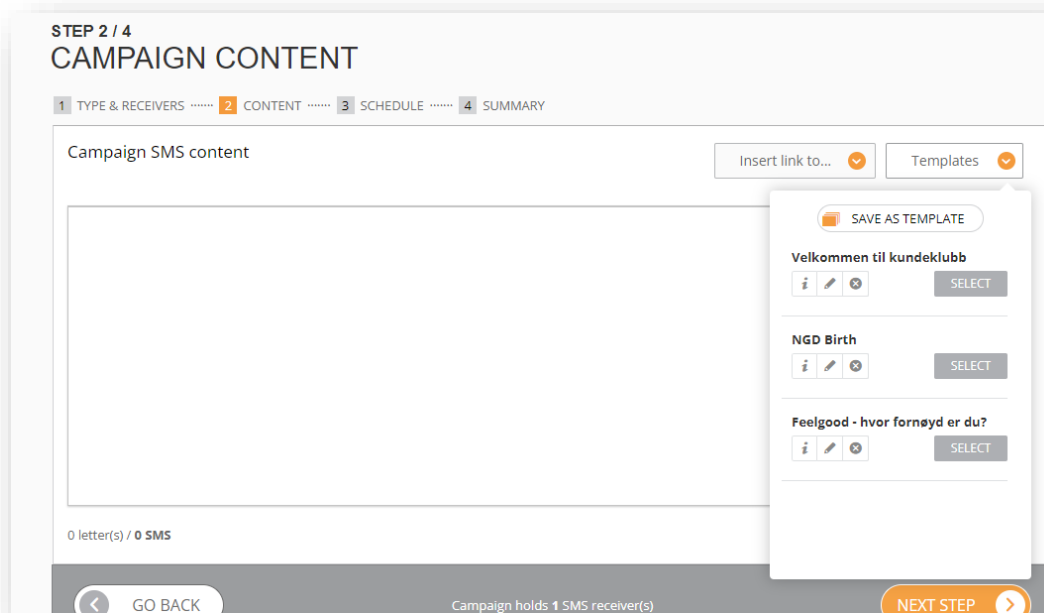
You will need these settings in case you:

- Disable GDPR consent filtering - would like to disable consent system (possibly for testing). [More on that in Campaign Wizard section](#)
- Allow duplicates - then 1 recipient might receive the same SMS more than once
- Select Country code - if you are sending out SMS campaign and decided to enter data manually (see Manual Input) and you have phones that belong to recipients from other countries (your account has Norway in its settings and you are using Swedish phones, for example). You need to select the proper country from this list
- SMS Time to Live - allows you to set the time when we will try to send your SMS. For example, there has been an error with the SMS provider, and we have 4-hour-time period to try again

2.1 Content. SMS Campaign



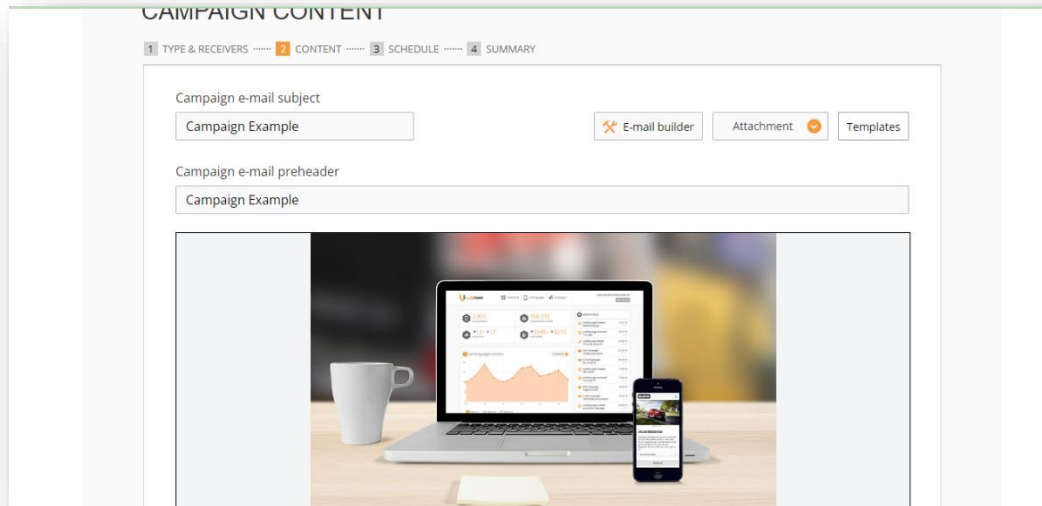
on this step you can insert landing page link or user management page link (available for the customers with subscription system on)



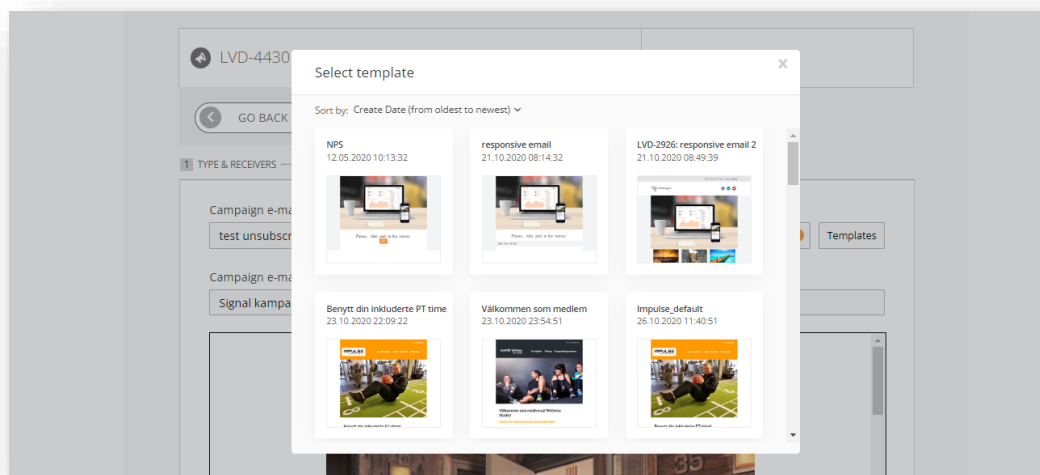
and manage SMS templates

2.2 Content. Email Campaign

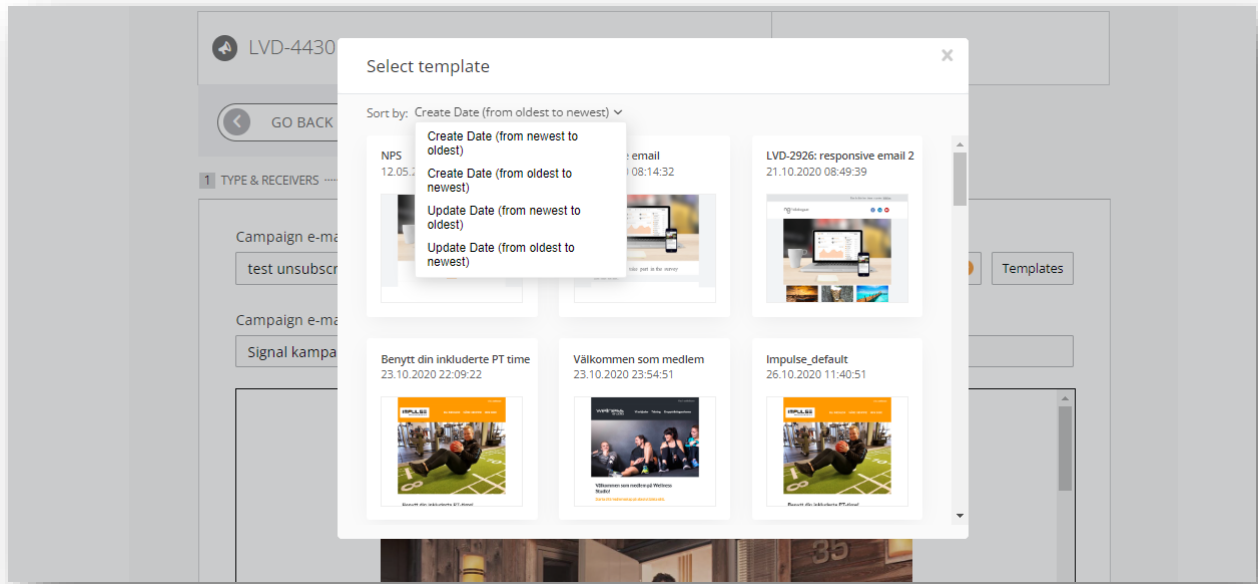
You can select a template:



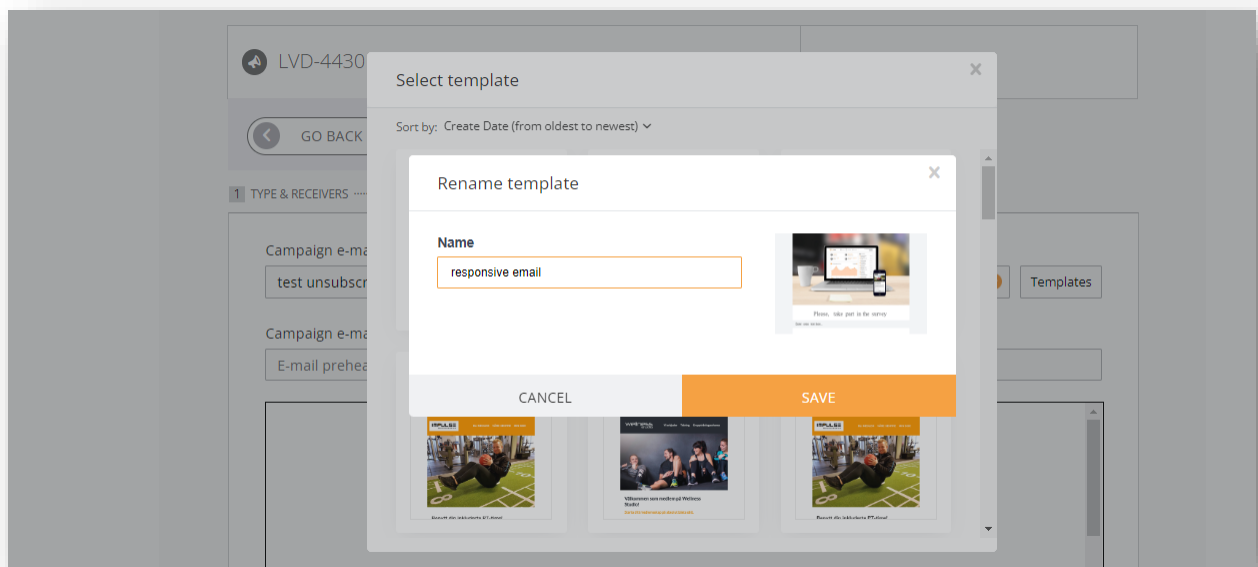
Template button



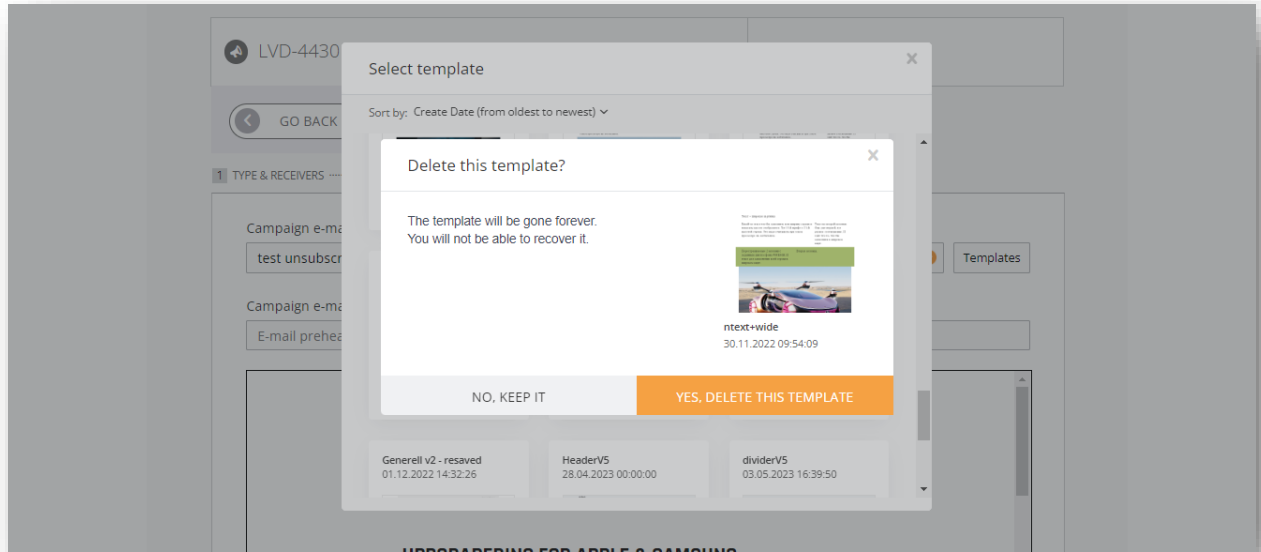
You can filter them by creation/update date:



Rename:



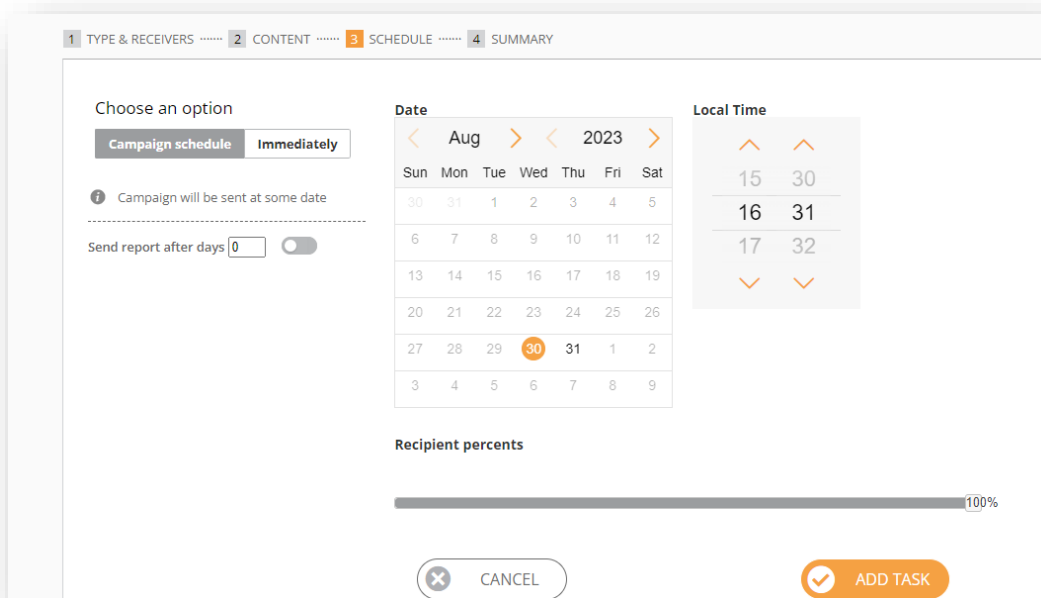
And delete:



You can click Email Builder and create a new one.

Read this article about [Email Builder](#)

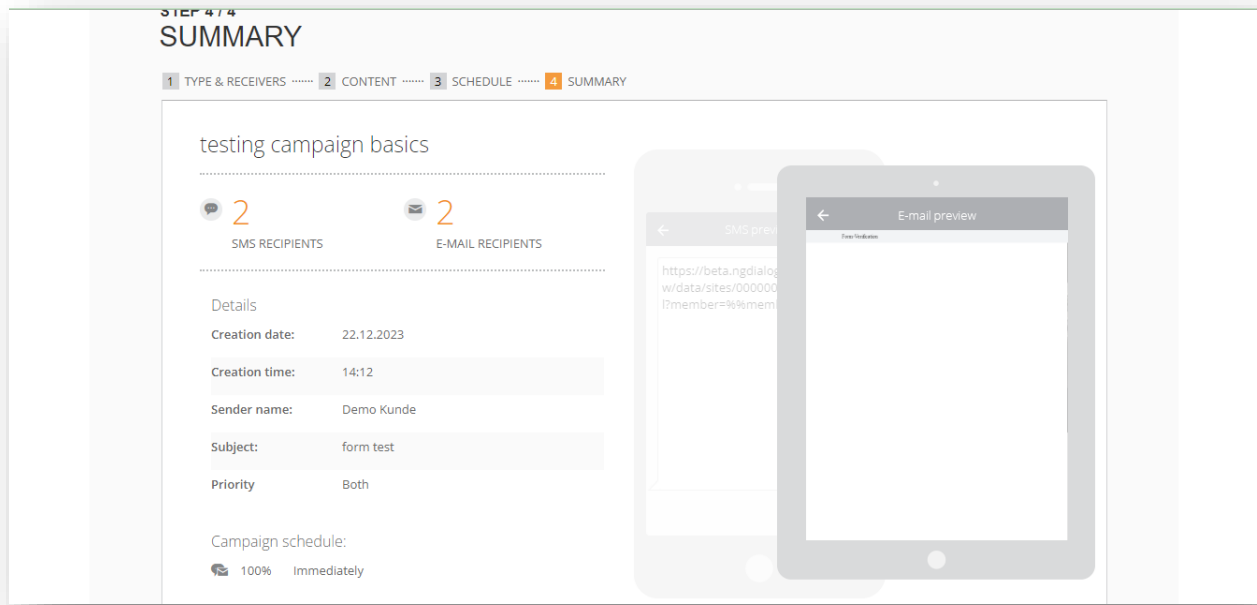
3. Schedule



You can send the campaign immediately or schedule it

4. Summary

This section shows all the final data and then we press SEND



While the campaign is being send, the status looks like “started”. You can already close this window or stay to see the status Completed

testing campaign basics

0% Started at 22.12.2023 14:16

2 SMS RECIPIENTS 2 E-MAIL RECIPIENTS

Details

Creation date: 22.12.2023

Creation time: 14:12

Sender name: Demo Kunde

Subject: form test

Priority: Both

Campaign schedule:

100% Immediately

1 TYPE & RECIPIERS 2 CONTENT 3 SCHEDULE 4 SUMMARY

testing campaign basics

Completed
Ended: 22.12.2023 14:17

2 SMS RECIPIENTS 2 E-MAIL RECIPIENTS

Details

Creation date: 22.12.2023

Creation time: 14:12

Sender name: Demo Kunde

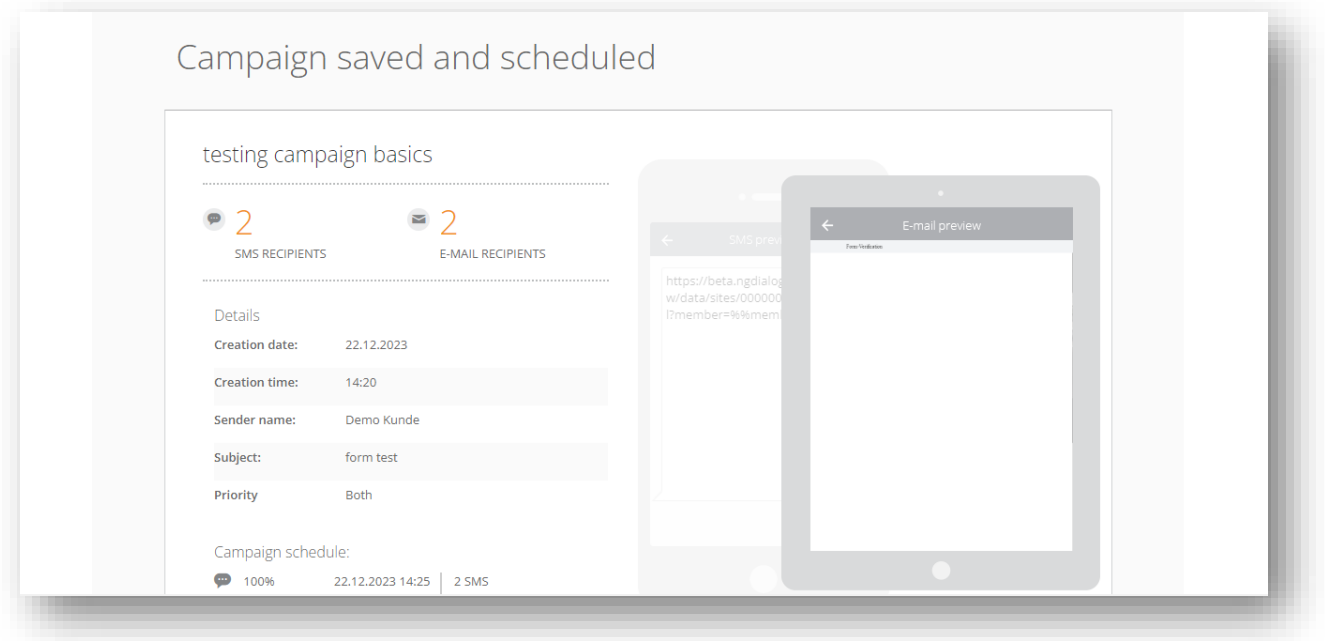
Subject: form test

Priority: Both

Campaign schedule:

100% Immediately

If the campaign has been scheduled, you won't see a green tick until the campaign has been sent out:

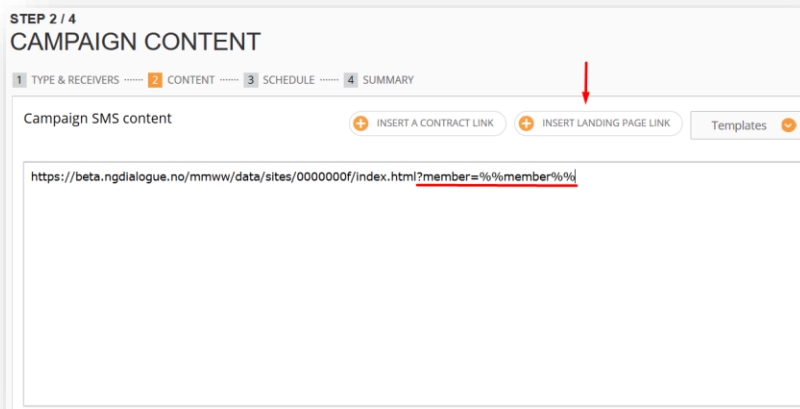


More on campaign statuses and where to check them.

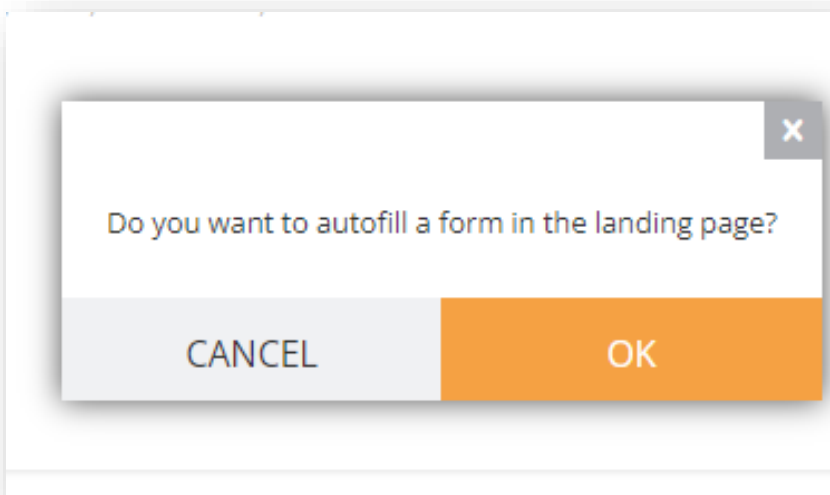
Email Builder: How to add memberlink

Memberlink is needed to connect data we get when users posts it (their rates, comments, phone number) and their record in the datasource (a table or a group of tables in our database) if one is used (it can be members datasource, NPS datasource or anonymous). If you are sending out using manual input or Excel, it is not needed.

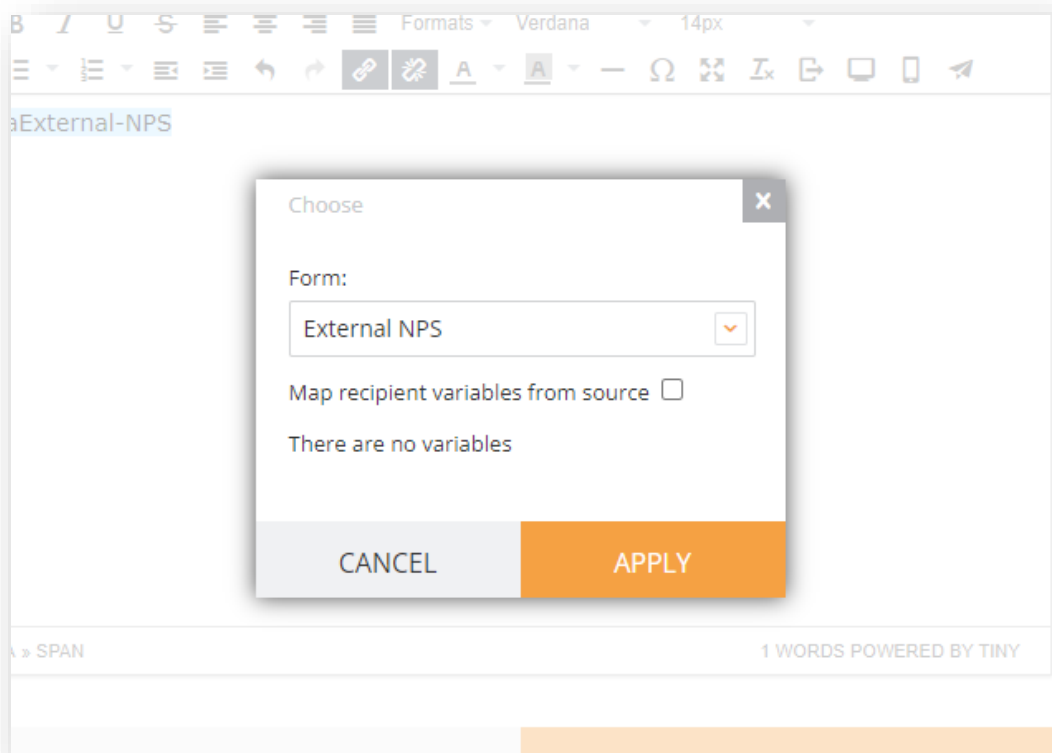
To add a memberlink: you can add a landing page link and then add a member variable
`?member=%%member%%`



or after clicking Insert Landing Page link click here OK



And here you need to click “map recipient variables from source”



The same can be done in Email builder, except you need to add a text block first, click “edit” and do the same.

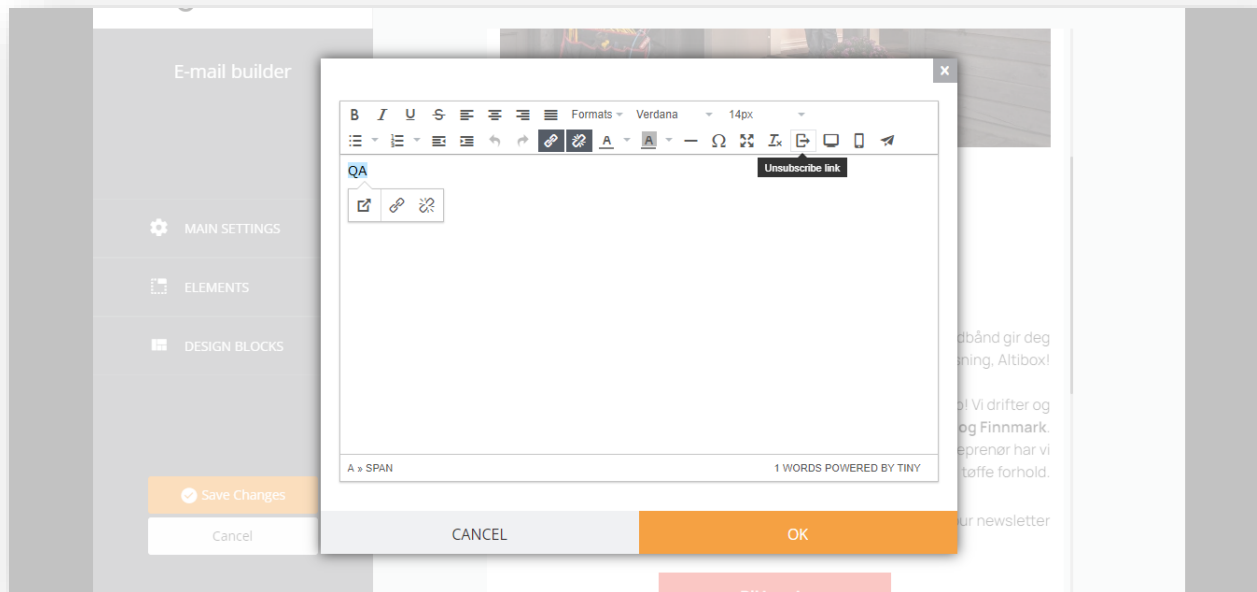
NB! If the form on the landing page is NOT mapped to the same datasource you are using to send out the campaign, the system will NOT prompt you with “map recipient variables from the source” (unless you are using anonymous or external datasources, [read more](#))

The link is generated. You can leave it in the text or copy and transfer to use in a button.

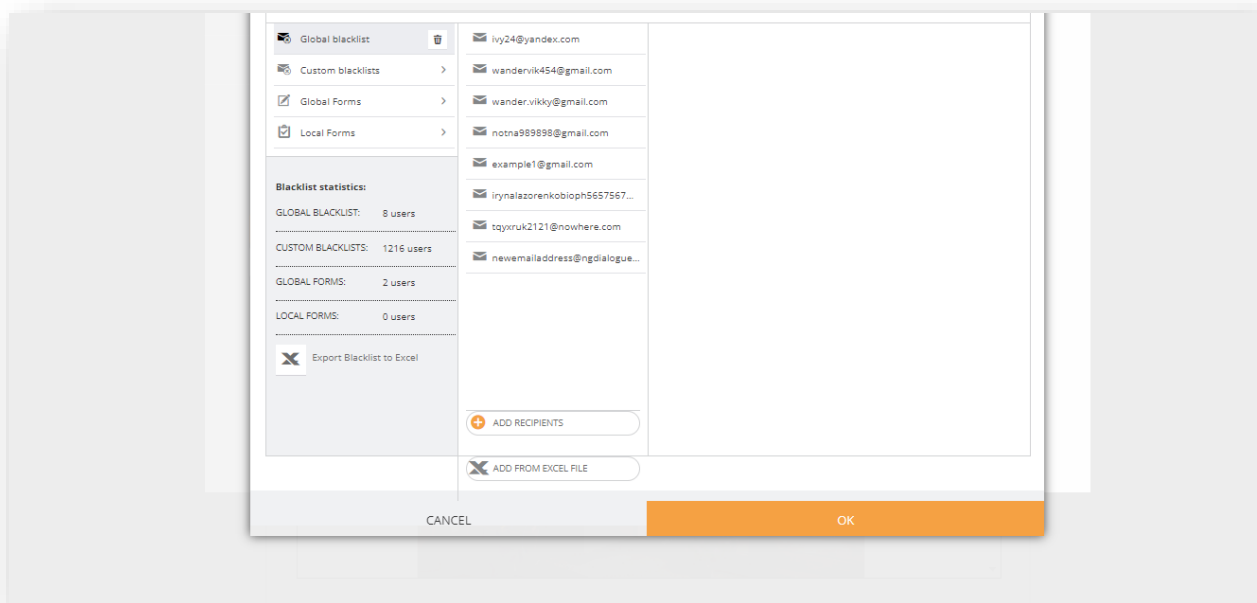
NB! <https://globalbeta.infact.no/commonnpsresponseaction/?member=%%member%%> is a memberlink **before** it is processed by the system. Until it is done, the link is not active and unique. **After the campaign has been sent out, the link will look like this and only then a user will be able to see all questions and post.**

Email Builder: Links

Unsubscribe Link



After clicking it, you are prompted to choose the blacklist ([guide on blacklist](#)).

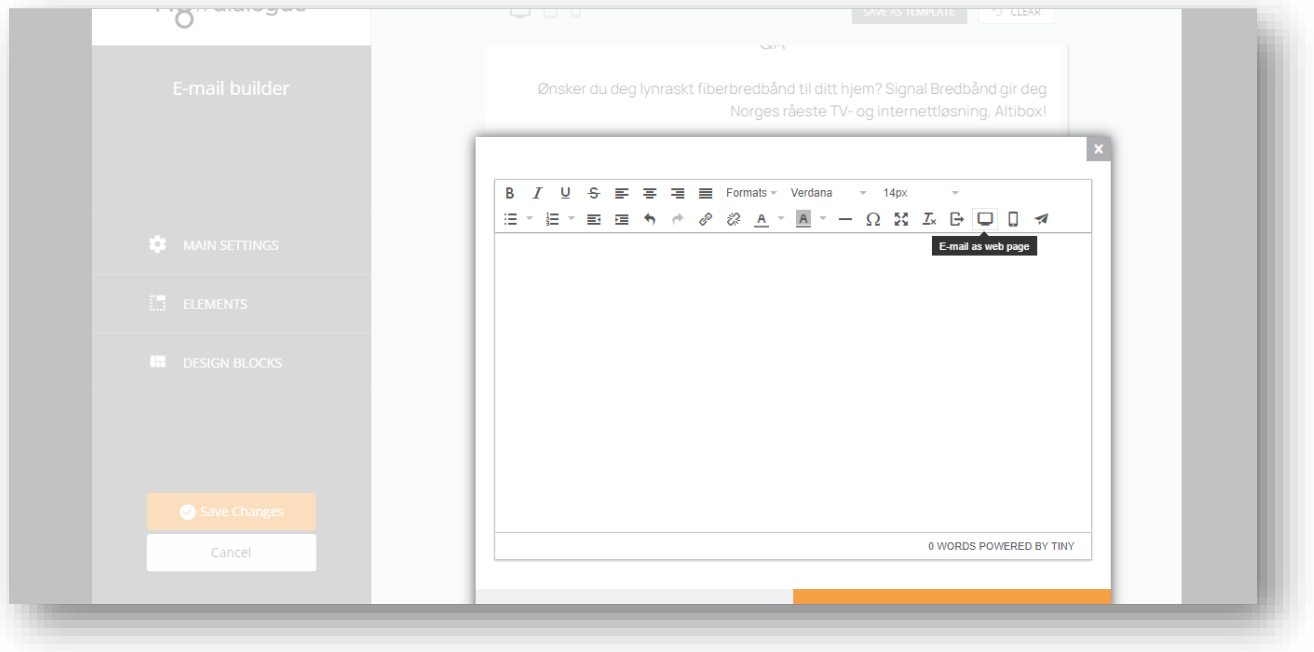


Click OK after that and the link will be generated. When clicking the link ([like that](#))

User will be offered to unsubscribe (their contact will get into blacklist).

Email Builder: See Email as Web-Page

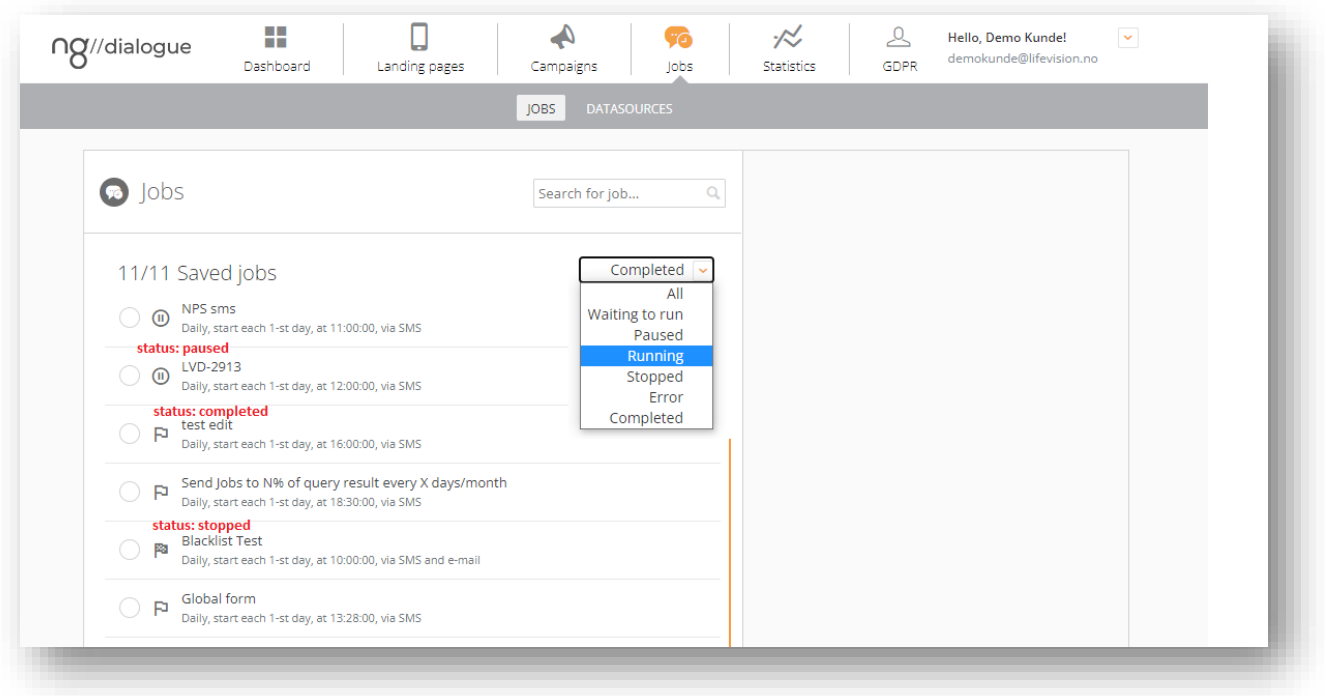
To get the email open as a link “Trouble viewing this message? [Click here](#)”, you can use this feature:



Jobs

To use jobs, the customer must have a datasource and jobs have to be enabled when creating a ds or by tech team.

Jobs are campaigns that are sent periodically. You can set the parameters for the job in the tab Jobs.



different statuses for jobs

How to create a job

Click Add a job under Job section

The screenshot displays the '17/17 Saved jobs' section of the InFact interface. On the left, a list of jobs is shown, each with a status icon (a circle with a checkmark or a square with a checkmark) and a brief description of the job's schedule and delivery method. At the bottom of this list is an 'ADD A JOB' button. On the right, a detailed view of a selected job is shown, including its date range, frequency, status, and query details.

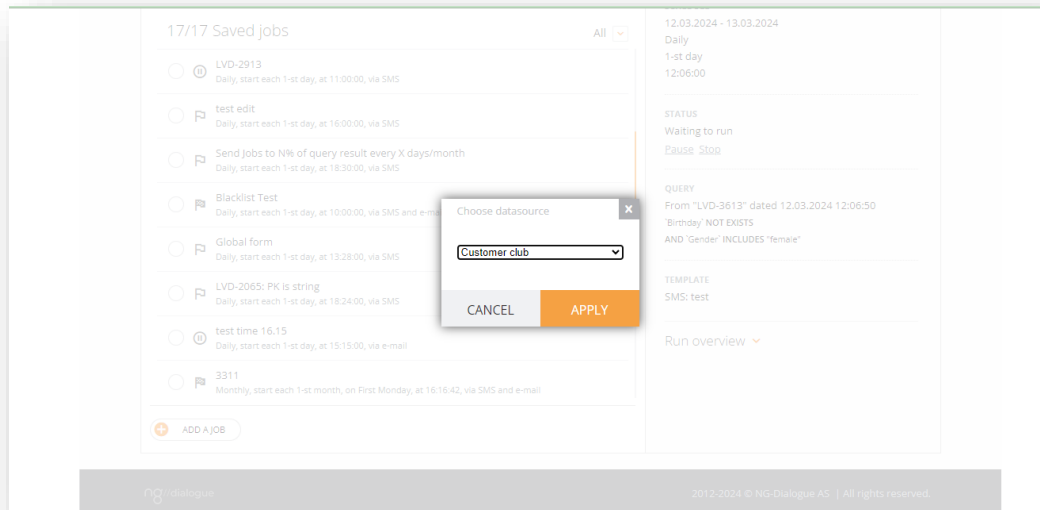
| Job ID | Frequency | Start Time | Delivery Method |
|--|-----------|------------|--------------------|
| LVD-2913 | Daily | 11:00:00 | via SMS |
| test edit | Daily | 16:00:00 | via SMS |
| Send Jobs to N% of query result every X days/month | Daily | 18:30:00 | via SMS |
| Blacklist Test | Daily | 10:00:00 | via SMS and e-mail |
| Global form | Daily | 13:28:00 | via SMS |
| LVD-2065: PK is string | Daily | 18:24:00 | via SMS |
| test time 16.15 | Daily | 15:15:00 | via e-mail |
| 3311 | Monthly | 16:16:42 | via SMS and e-mail |

Job Details:

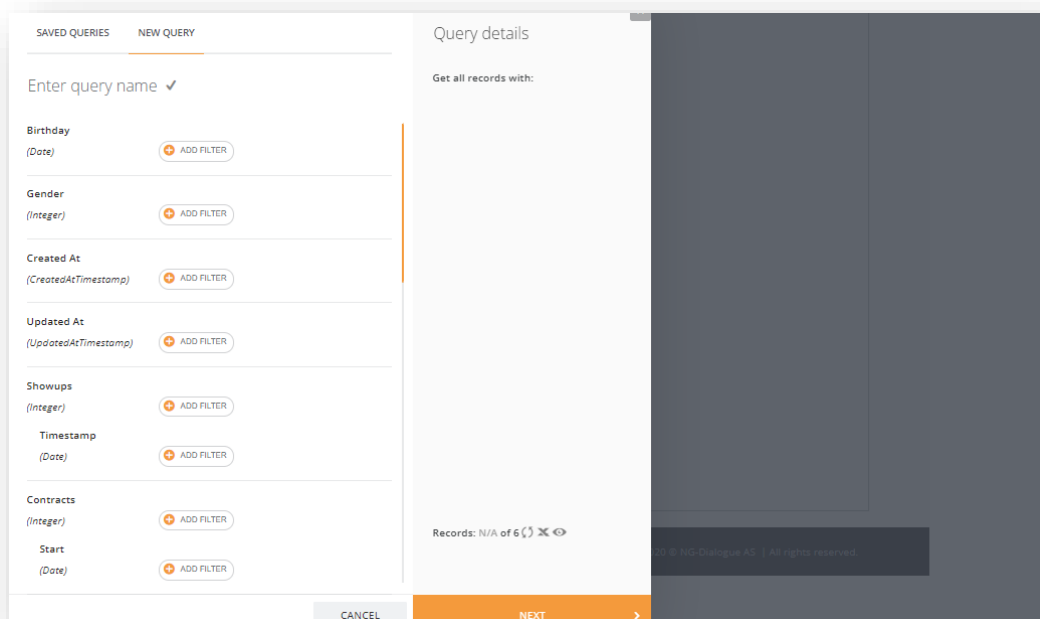
- Date Range: 12.03.2024 - 13.03.2024
- Frequency: Daily
- Start Time: 12:06:00
- Status: Waiting to run
- Actions: [Pause](#) [Stop](#)
- Query: From "LVD-3613" dated 12.03.2024 12:06:50
"Birthday" NOT EXISTS
AND "Gender" INCLUDES "female"
- Template: SMS: test
- Run overview ▼

Add a job button

Once you've clicked **Add a job**, you can choose the datasource.



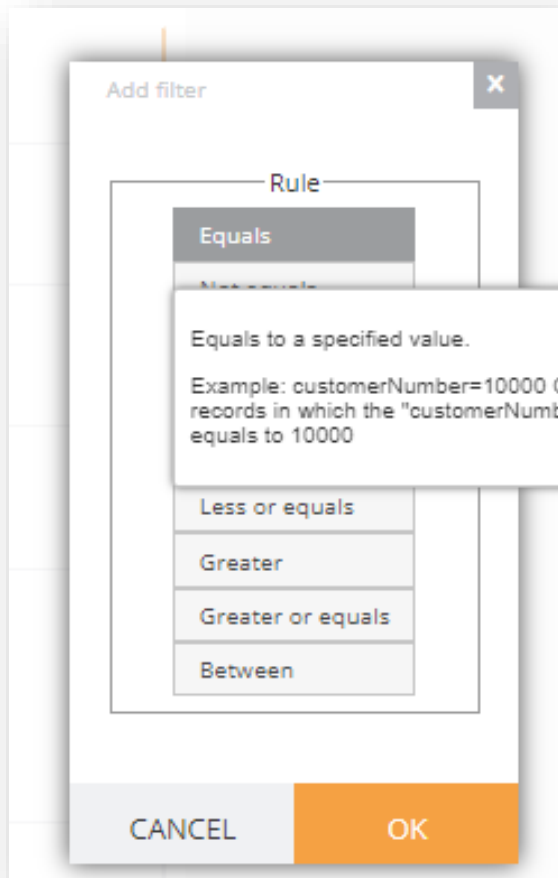
After that create a query:

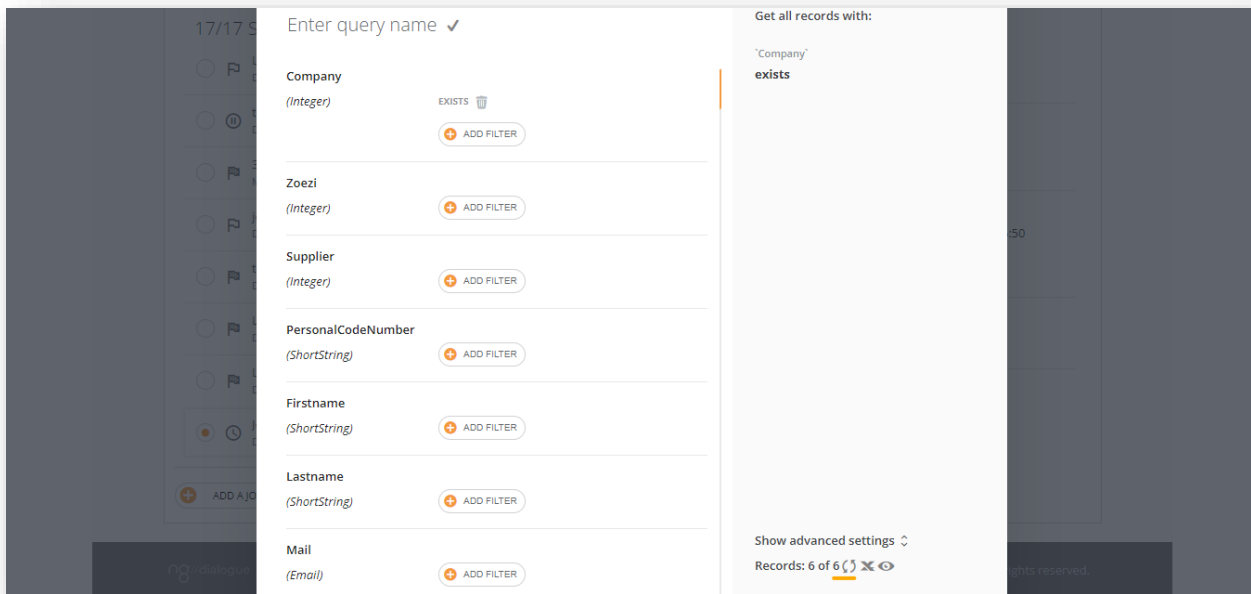


Query is a combination of filters that you use to select a specific group of recipients from your datasource to receive the job. For example, people who have birthday in the upcoming week.

You can hover over rules to see the explanation

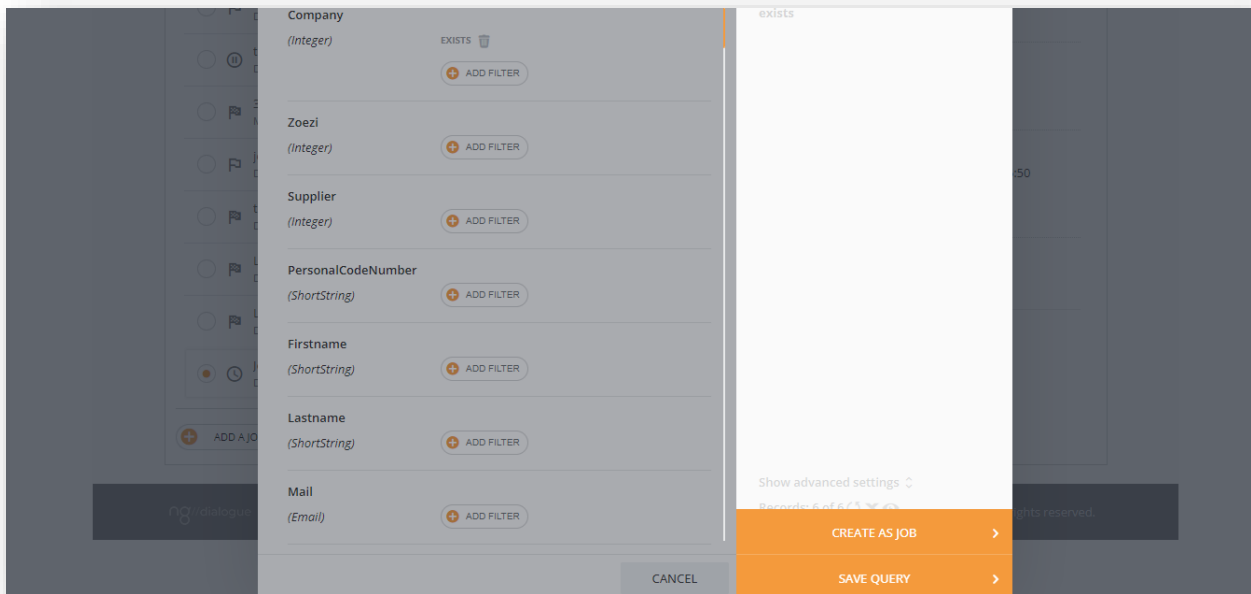
Every time you apply a new filter, please click this button to see how many recipients it has selected.





Refresh button

To continue, click **Create as a job** and fill out other settings:



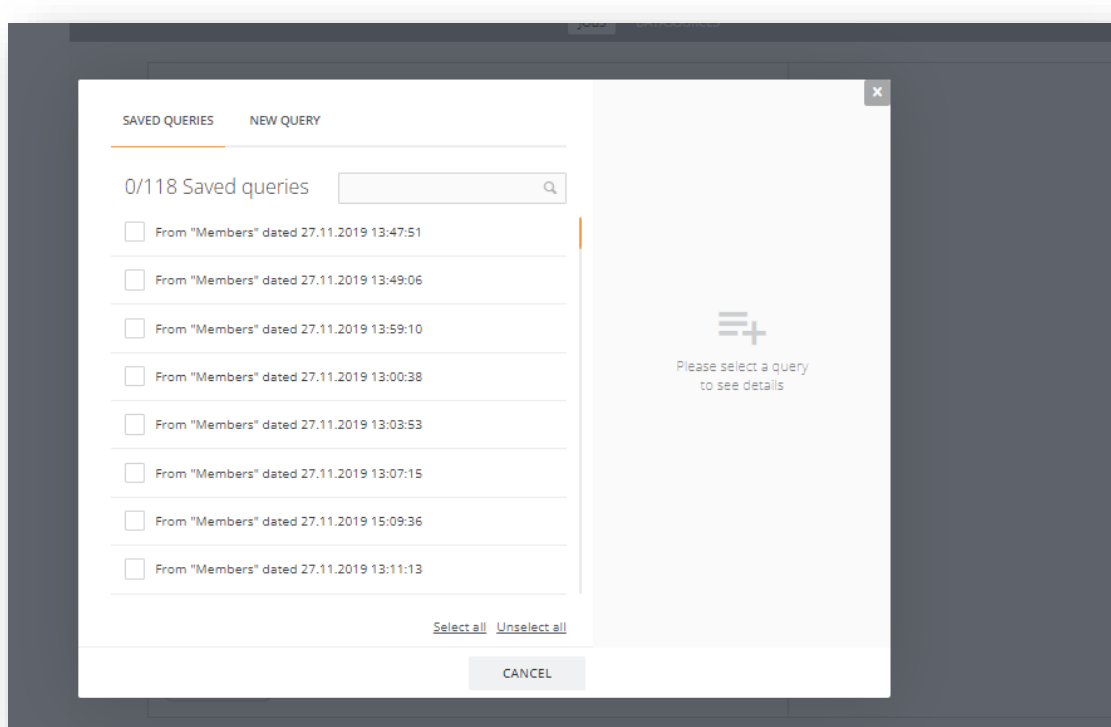
Remaining settings

Send means Send Jobs to N% of query result every X days/months. If left empty, the default value is 100%.

In this step, you need to write the name of the job, subject, choose campaigns you've created previously, map phone and email fields, and set a schedule.

Now we also support more than one phone/email field:

You can also pick the query from Saved:



Job Statuses

Once a job is created, it can be:

- Edited
- Deleted
- If it is on pause, it can be resumed or stopped

If it has been stopped due to an error, it can be:

- resumed
- stopped
- error (show error)

If the job is completed, it can be:

- Edited
- Deleted
- You can see its overview

When the campaign is sent, it is saved in Campaigns / Job: *Job's name* folder:

Edit Query of Existing Job

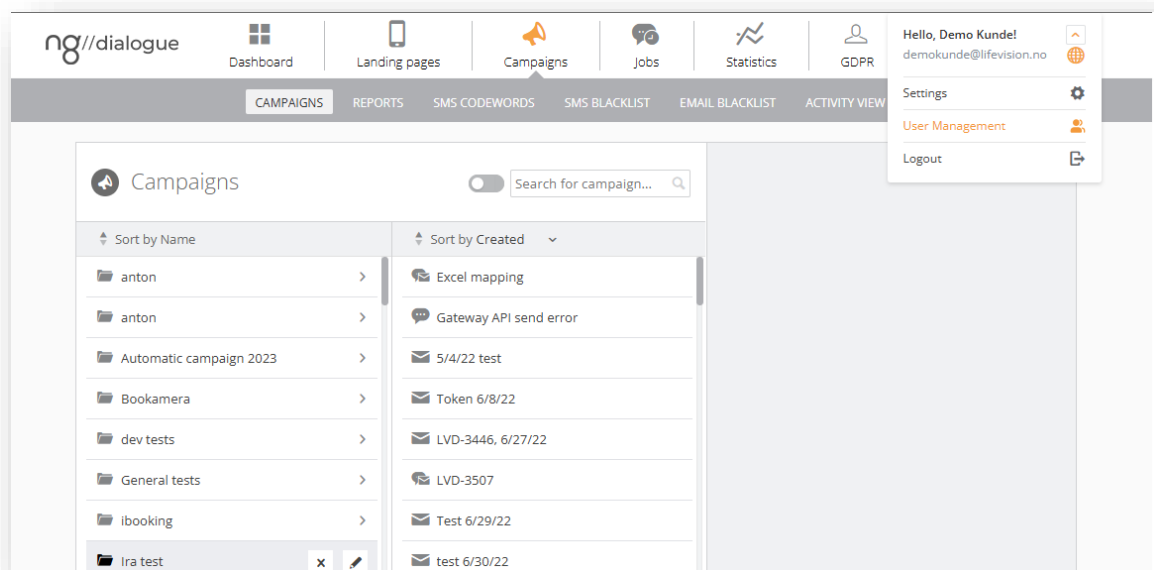
Click “Edit Query” button to change applied filters

User Managing Tab

User Management Tab lets you manage users, accounts, invitation and access

Access

You can access it here:



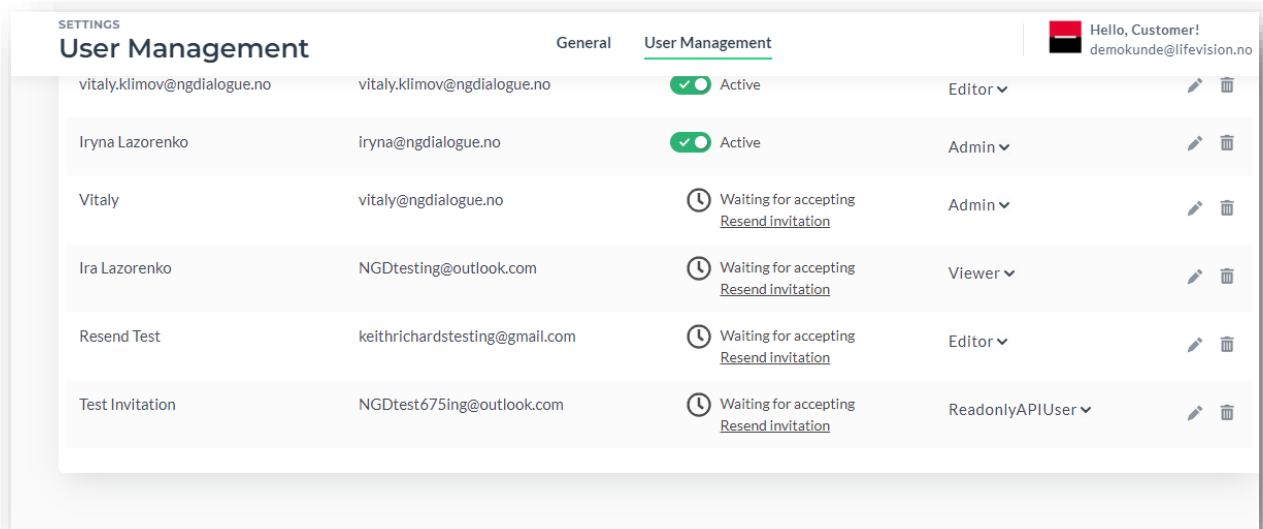
Features of users management tab

- Invite a user
- Delete a user
- Change user's role
- Activate/Deactivate user
- Resend invitation

Roles

- Administrator - full access (as we have now) + user management. The administrator can send Invite to a new user. The user Invitation link expires after 7 days. After 7 days admin can resend the invitation. a pending invitation is marked as pending
- Editor - full access (as we have now for a customer), no user management
- Viewer - can't send campaigns and create jobs, just new them and work with Dashboard (add cards, view data, graphs)
- API user and APIReadOnly user - access to API only (these roles cannot be assigned via UI, ask the tech support regarding it)
- NB! All users have the same view in our main site (where we create forms and campaigns) but the Dashboard is set differently meaning that the cards, tabs and filters are different for different users.

General look



The screenshot shows the 'User Management' section of a settings page. It features a table with columns for user details, status, role, and actions. The status column includes a green checkmark for active users and a clock icon for pending invitations. The role column shows dropdown menus for each user's role. The actions column contains edit and delete icons.

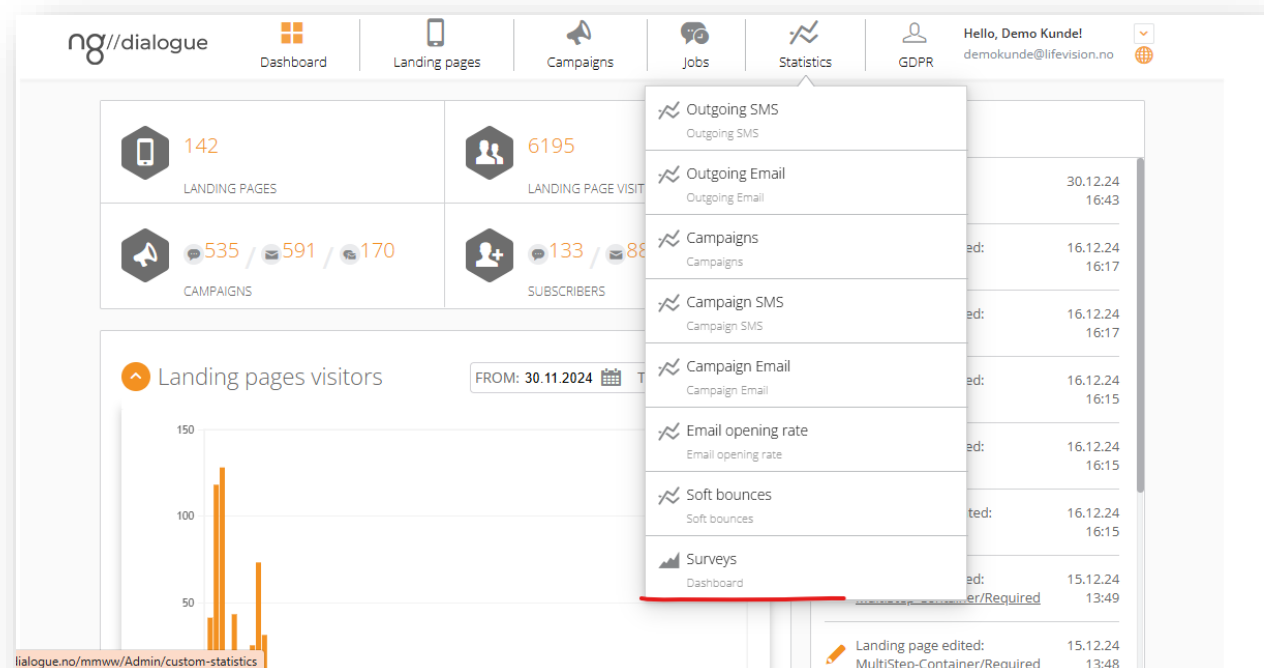
| User Management | | General | User Management | |
|-----------------------------|--------------------------------|---------|--|-----------------|
| vitaly.klimov@ngdialogue.no | vitaly.klimov@ngdialogue.no | | Active | Editor |
| Iryna Lazorenko | iryana@ngdialogue.no | | Active | Admin |
| Vitaly | vitaly@ngdialogue.no | | Waiting for accepting Resend invitation | Admin |
| Ira Lazorenko | NGDtesting@outlook.com | | Waiting for accepting Resend invitation | Viewer |
| Resend Test | keithrichardstesting@gmail.com | | Waiting for accepting Resend invitation | Editor |
| Test Invitation | NGDtest675ing@outlook.com | | Waiting for accepting Resend invitation | ReadOnlyAPIUser |

Dashboard

Setting up the Dashboard

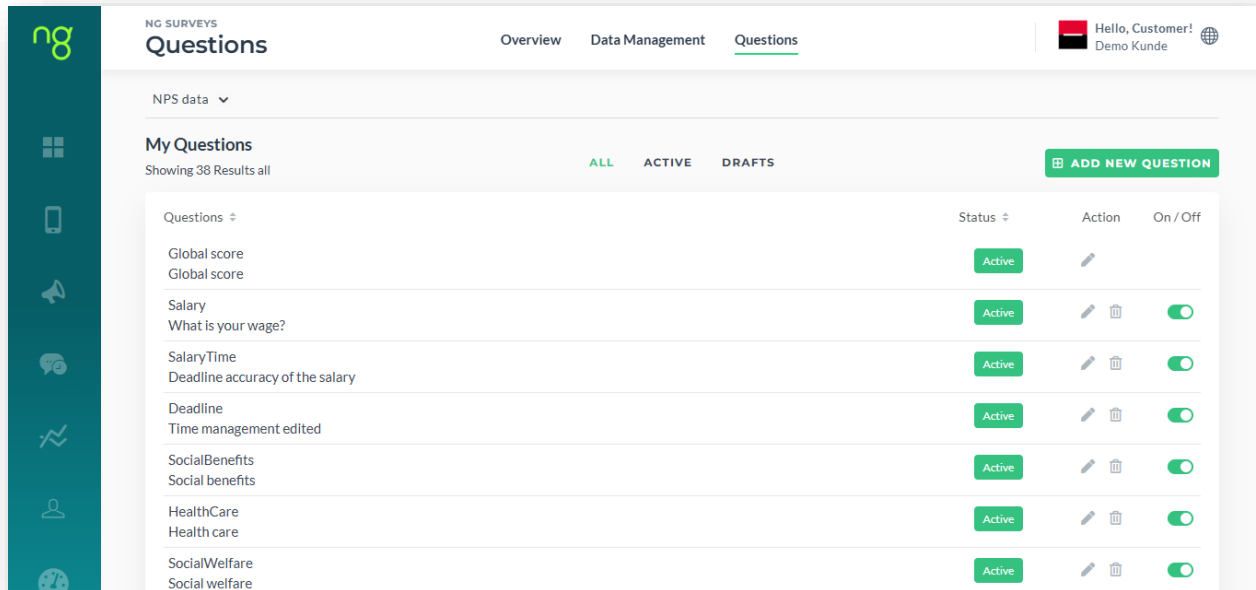
Open Dashboard

Log in into your account and go to Statistics → Dashboard (if you cannot access it, ask your digital advisor to set it up).



Add Questions

Go to Questions

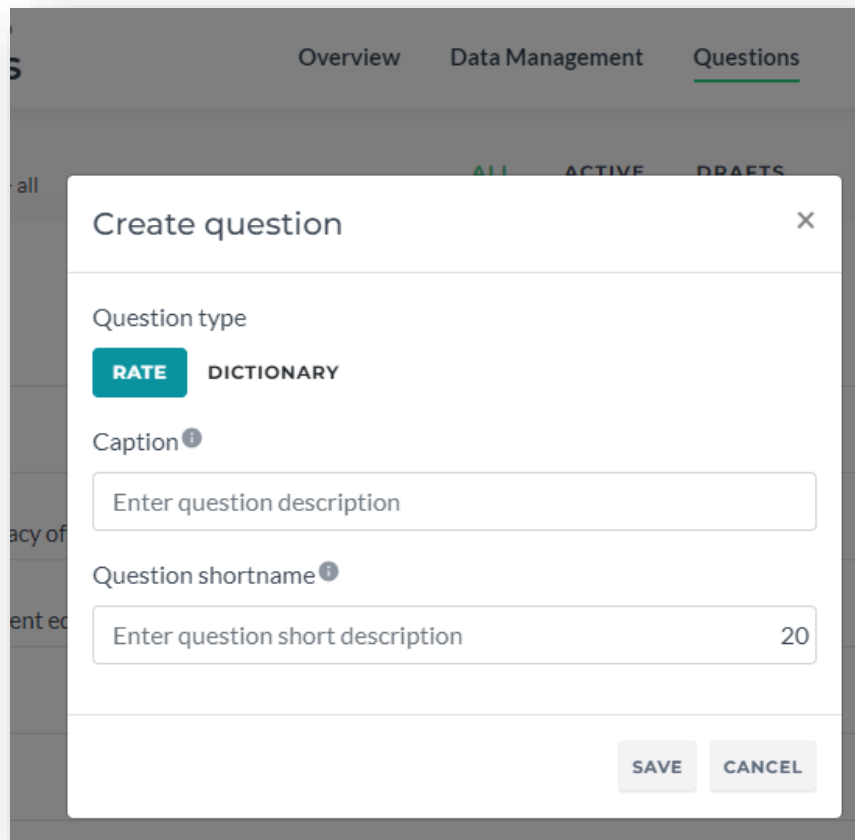


Questions have three sections: all, active and drafts. You can add/delete questions, activate and deactivate them.

Question can consist of such fields: **caption and short name**. For example, in a question "**online_facilities** *How happy are you with our online facilities, such as notifications via emails, payment service, etc.?*" **online_facilities** is a short name and *How happy are you...* is a caption.

Rate question is a question where answers are numbers, points, stars. When we add them in Dashboard, we can only set up caption and short name. The rest (like how many points should

this question have) can be done in the form builder [when creating the](#)



Overview Data Management Questions

all ACTIVE DRAFTS

Create question ×

Question type

RATE DICTIONARY

Caption ⓘ

Enter question description

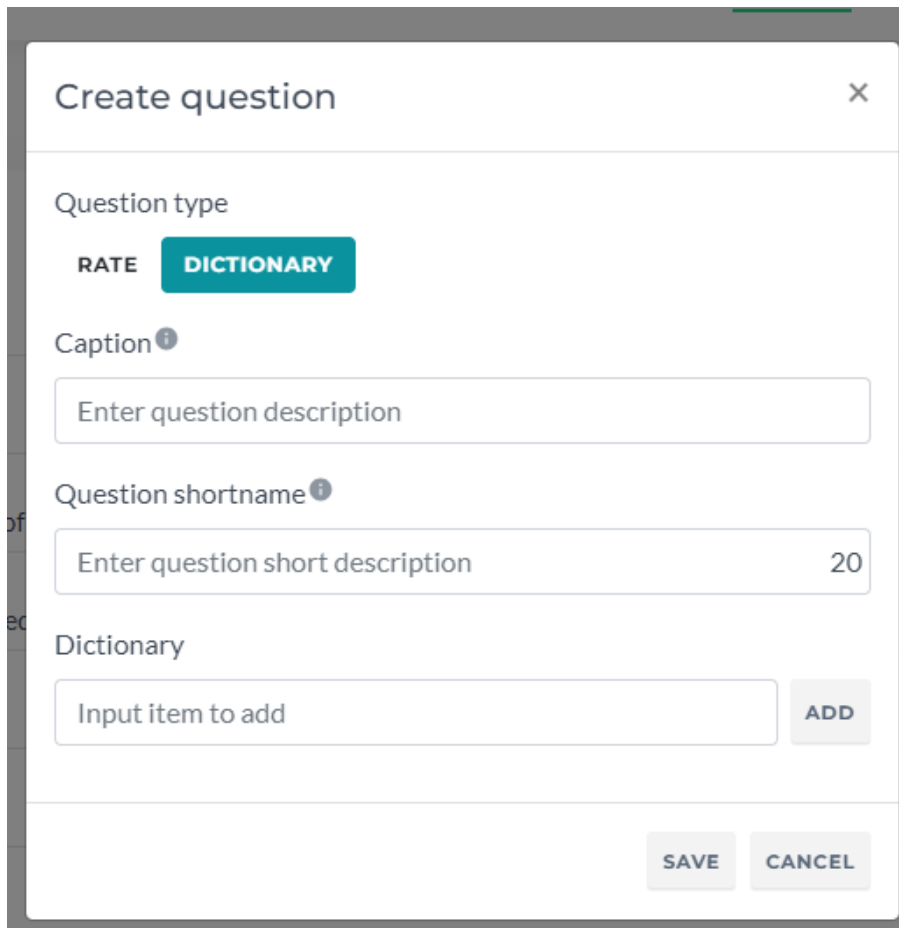
Question shortname ⓘ

Enter question short description 20

SAVE CANCEL

[form.](#)

Dictionary question is a question where answers are provided not as points but as options. For Dictionary-type question we also have a **dictionary field**. This basically is an answer option. **There must be more than 1 option** (for example Yes and No).



of

ec

Add questions and save them.

Multi-choice dictionary question

If for example, your survey includes a question “Which courses have you taken?” and there should be an option to select more than one, you can make your dictionary question a multi-choice. To do so,

1. Go to Questions in the Dashboard
2. Click Add Question
3. Click “Dictionary”
4. Tick Multiple select checkbox

Question type

RATE **DICTIONARY**

Caption ⓘ

Courses you have taken

Question shortname ⓘ

Enter question short description 20

Dictionary

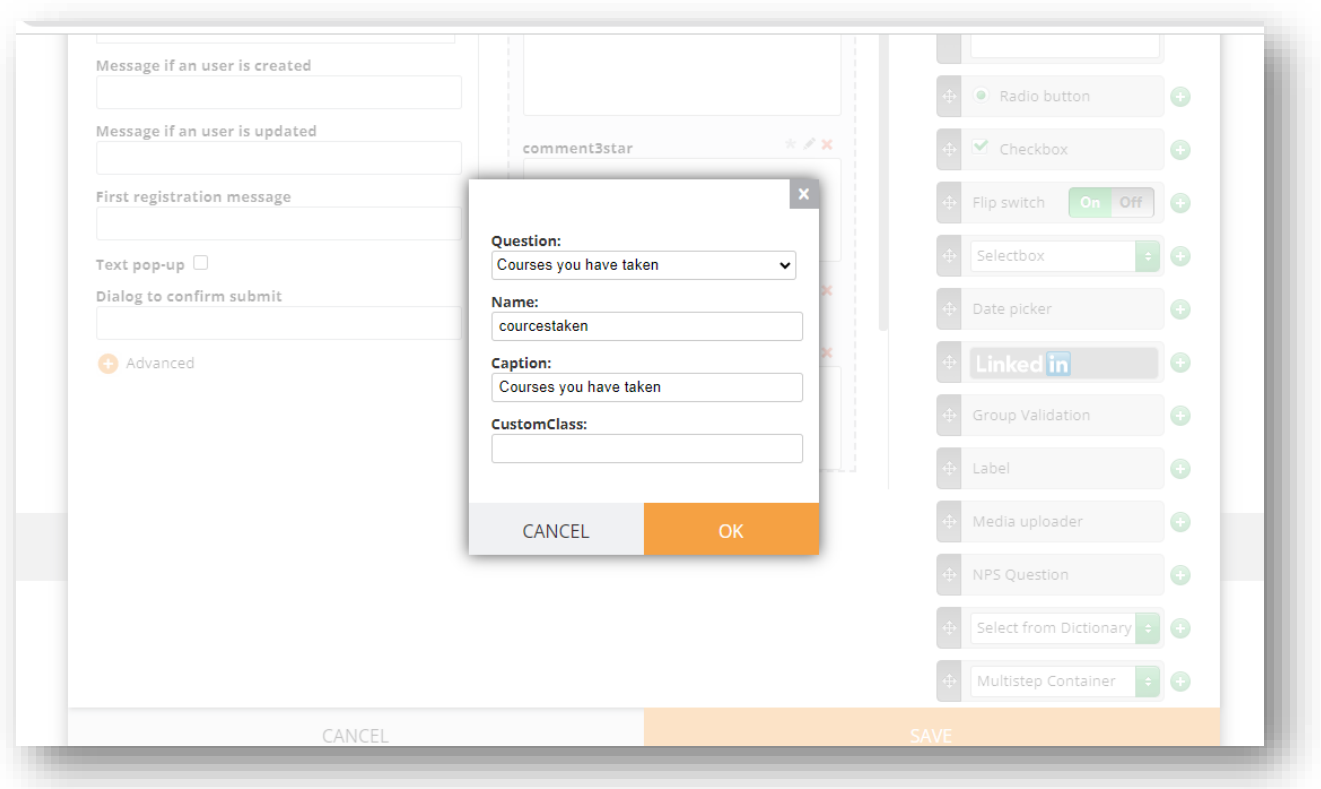
Course 1 Course 2 Course 3

Input item to add ADD

Multiple select

UPDATE CANCEL

As this is a modified version of dictionary question, to add it in a form, simply click “Dictionary Question” and select it from the list:

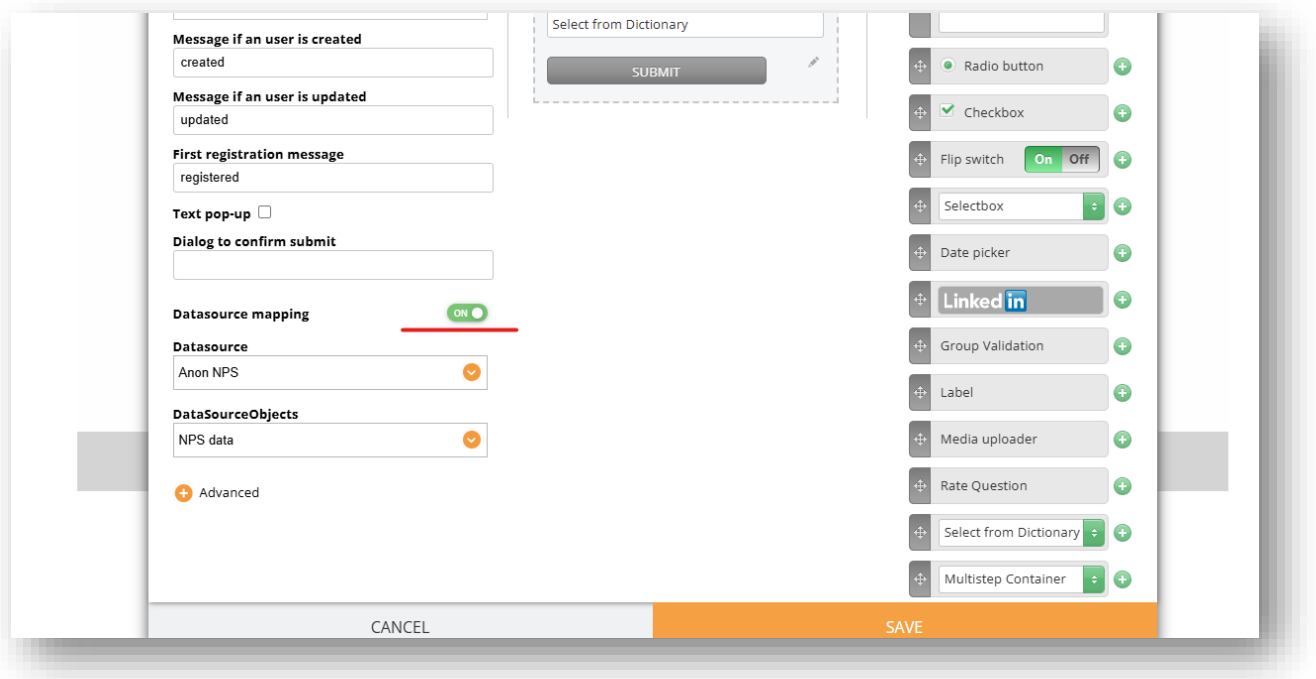


Setting up the form and mapping

Dashboard is a tool to visualize gathered data. To do so, we need to map our Dashboard with the form, which stores the answers.

1. Create the form

2. Enable mapping



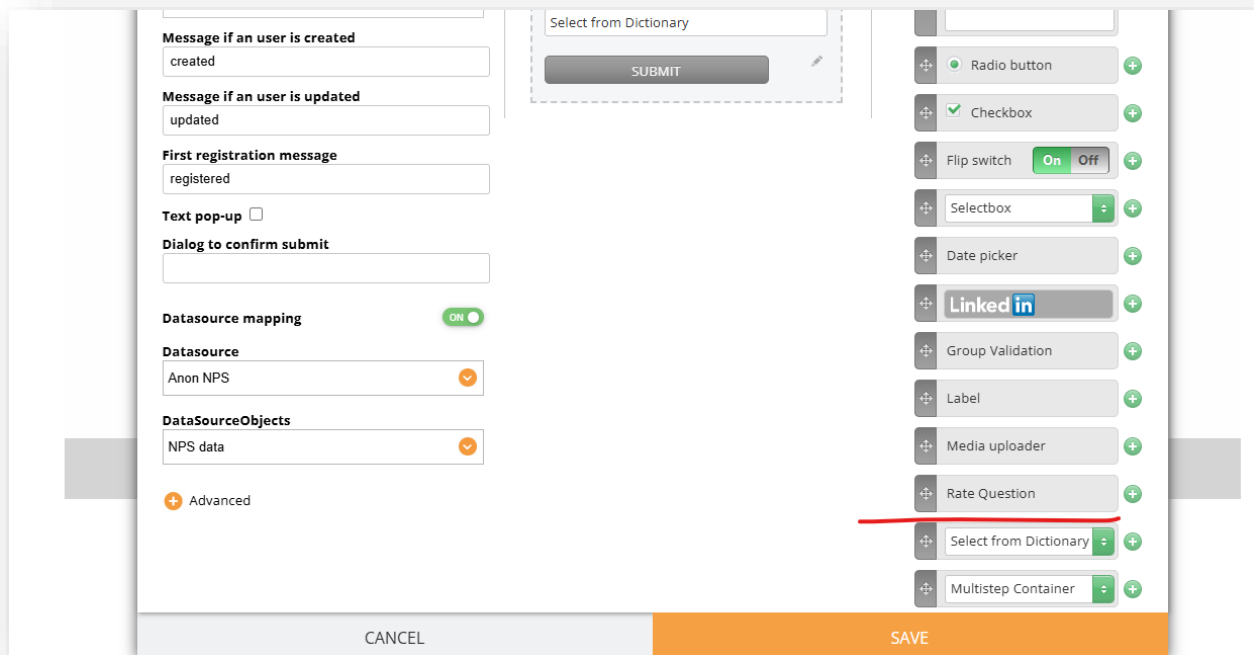
Enable the mapping and select your datasource from the list to make the system automatically add questions from Dashboard.

3. Save the form and re-open

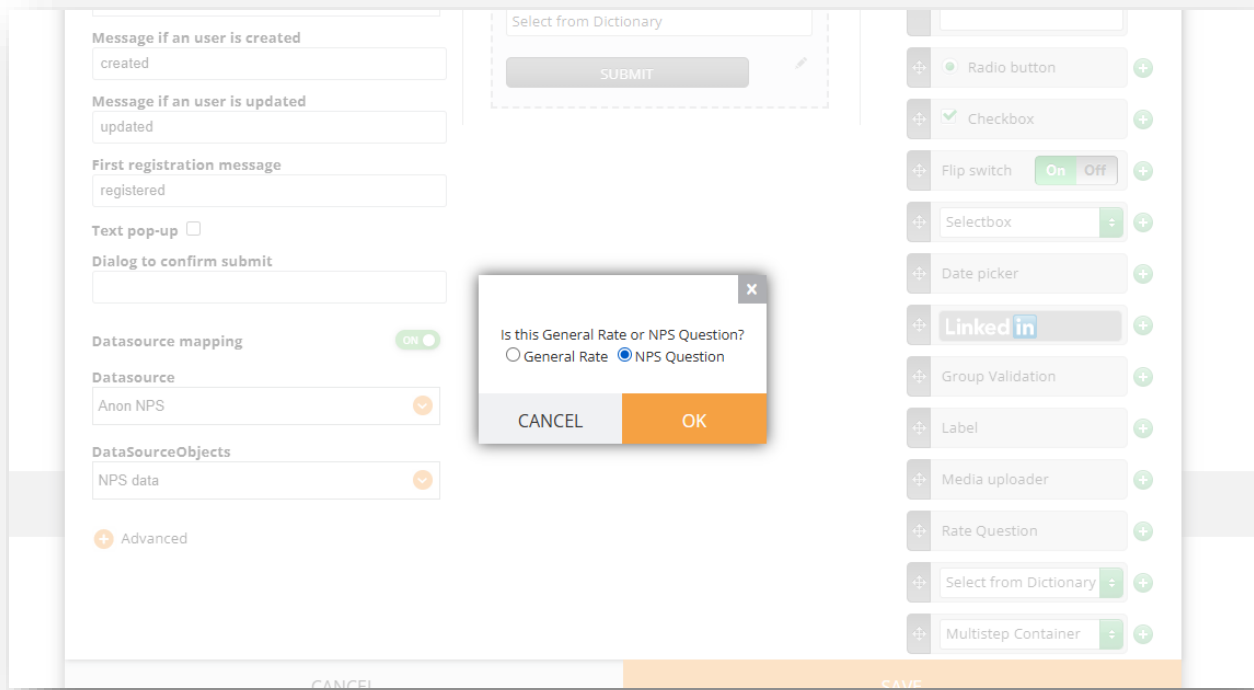
It needs to be done to make the mapping work. We will be working to remove this step in the future.

4. Adding Questions

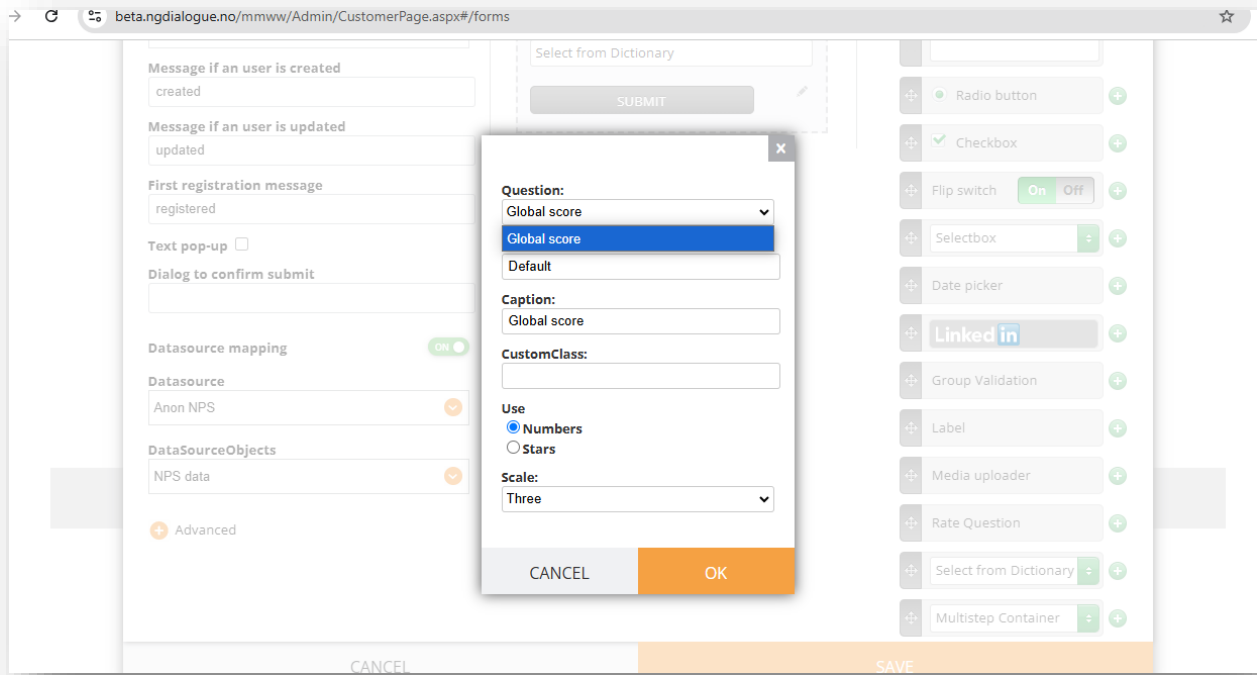
If you need to add Rate, Click Rate Question:



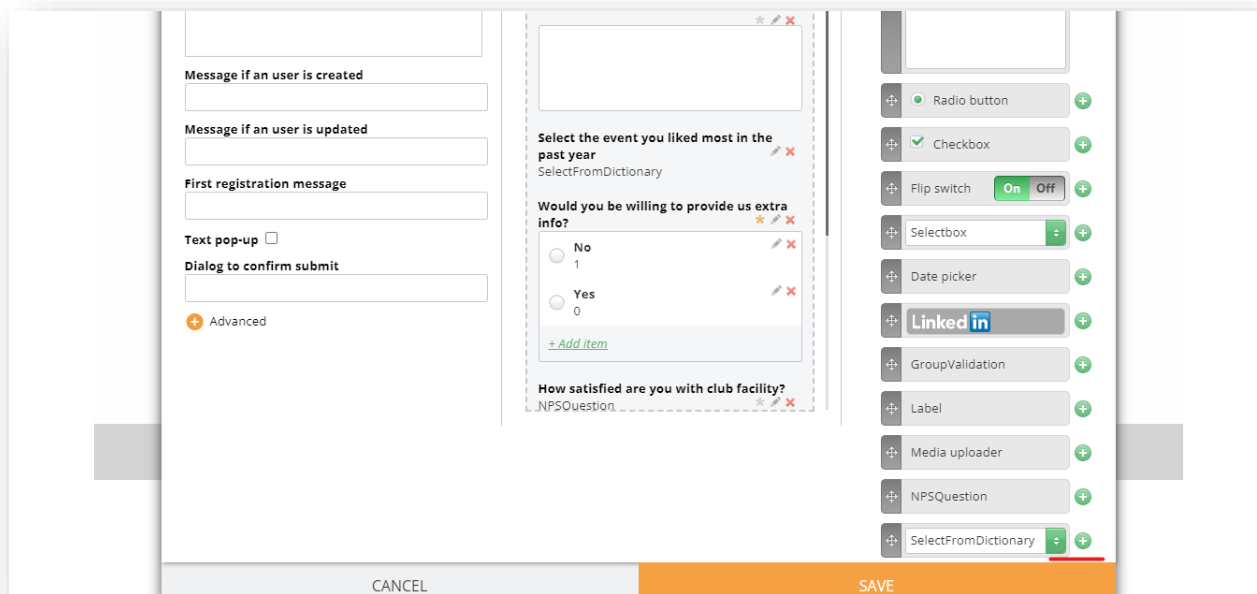
Select NPS Question type, it will let us use the questions from the Dashboard



Select the question from the list, choose scale and numbers or stars you need to use

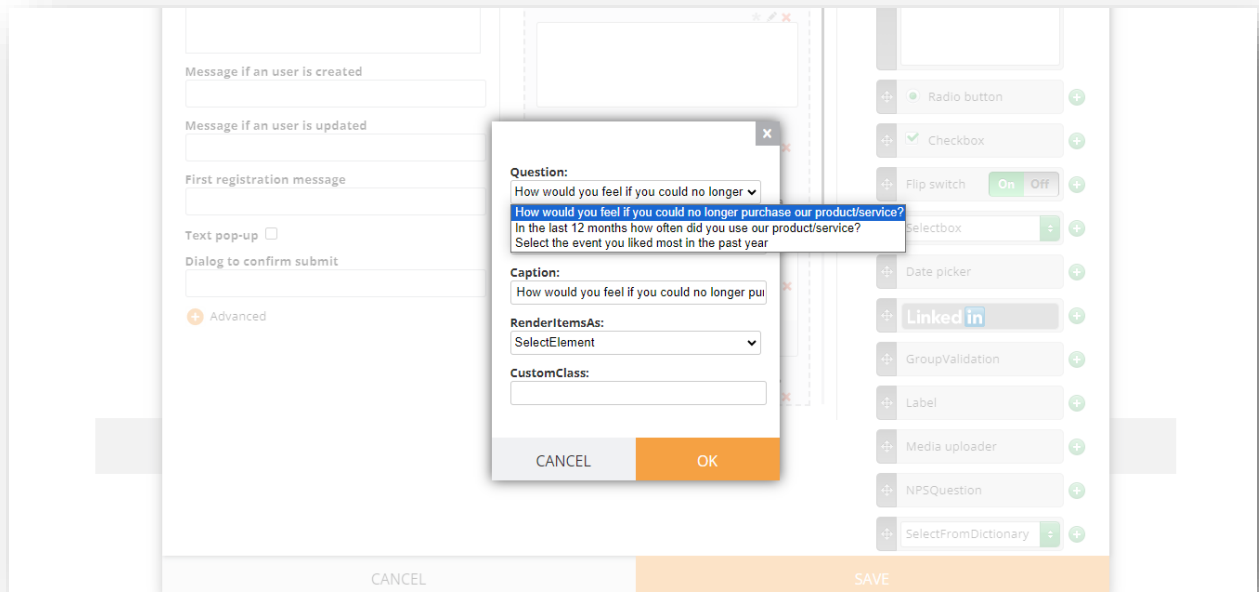


Adding Dictionary Questions



SelectFromDictionary is the button you need to add a dictionary-type question

Select the question:



5. Save the form

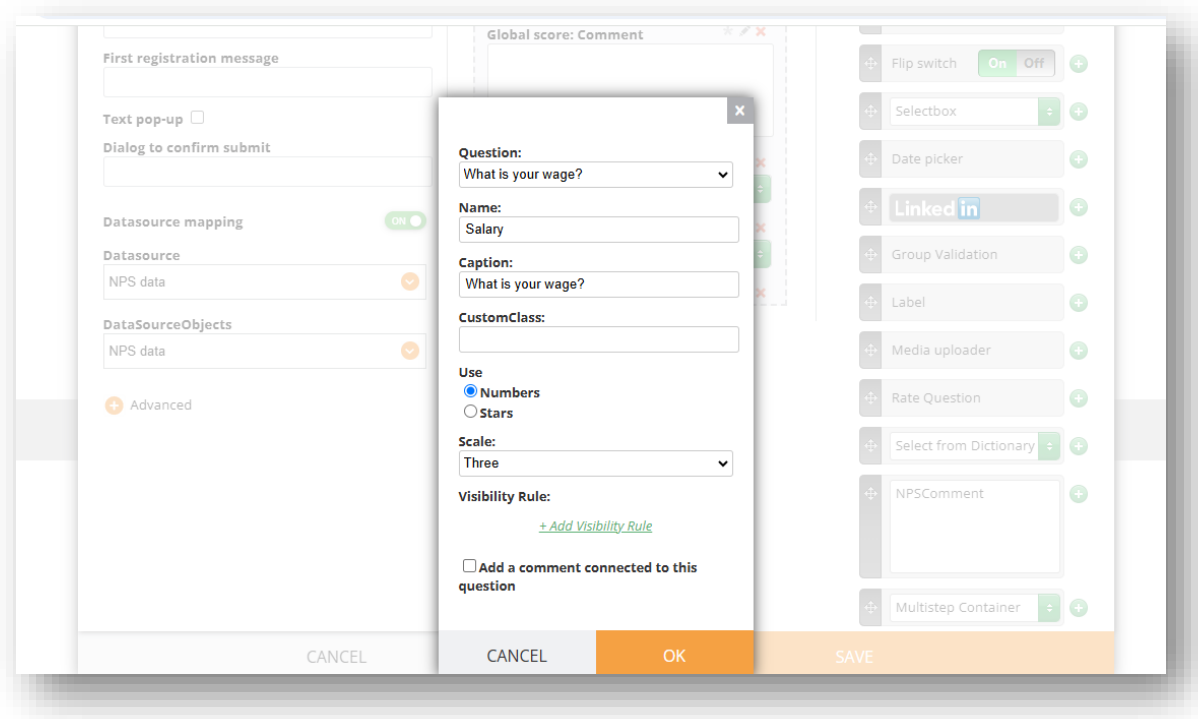
Comments

How to add comments?

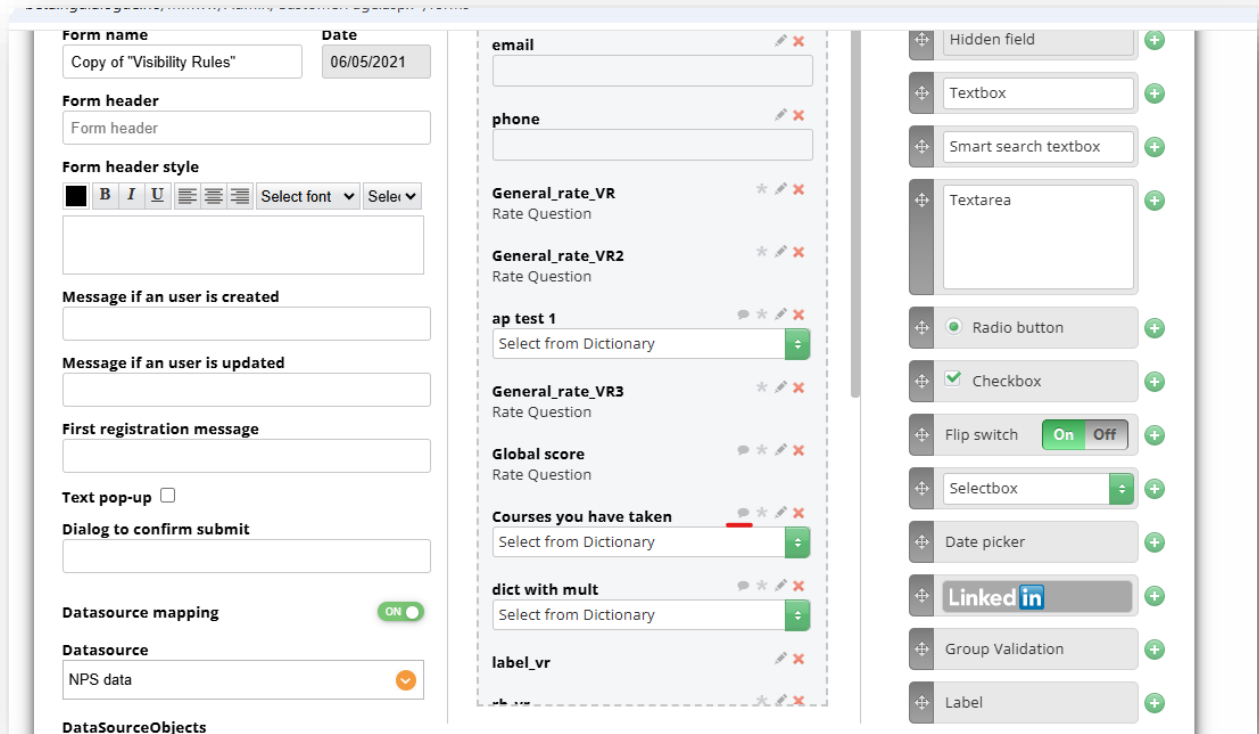
For example, you have a question (Rate or Dictionary) and you want to add a comment that will be visible all the time or will be seen if a member provides a low rate or answer “unsatisfied” and you would like to ask for additional details (to make a question seen under certain conditions, please, [check this article](#)).

If you have a mapped form (form that will be using questions from Dashboard for Survey), you can add comments in a few different ways:

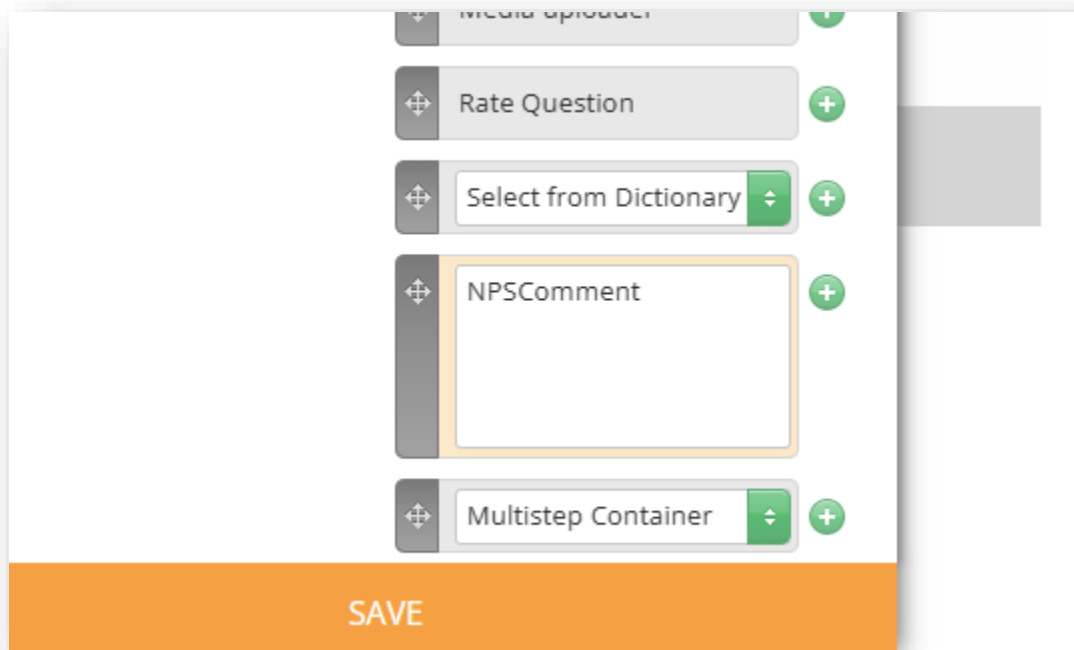
1. When adding Rate or Select from Dictionary, there is a checkbox asking “Add a comment connected to this question”. If it is checked, after saving there should be an automatically added NPS Comment, no additional action needed;



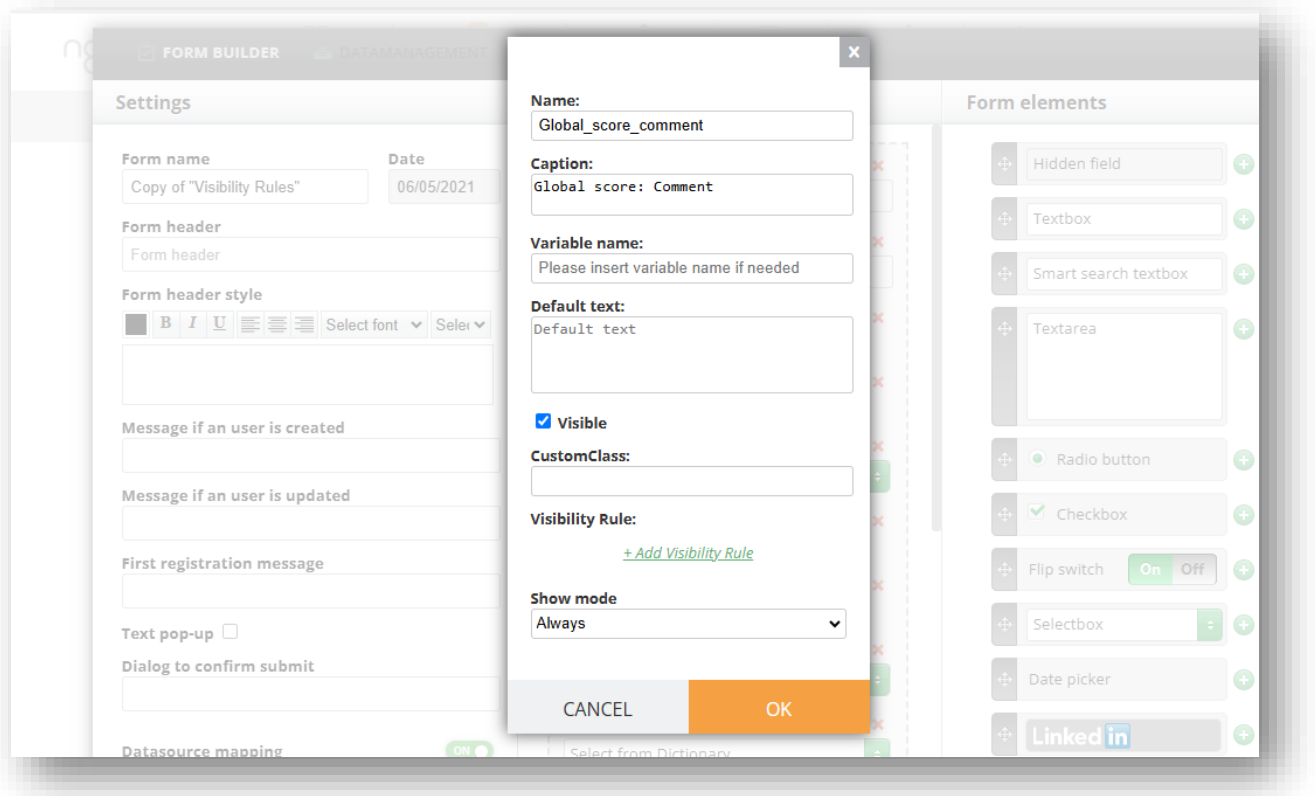
2. If Rate and Select from Dictionary have been added previously and now you need to add a comment to them, here (shown on the screenshot) click this icon When it is colored, the comment connected to this question exists, when it's grey - it does not exist;



3. If this element is selected without creating a question before that, just connect it to the first question available;



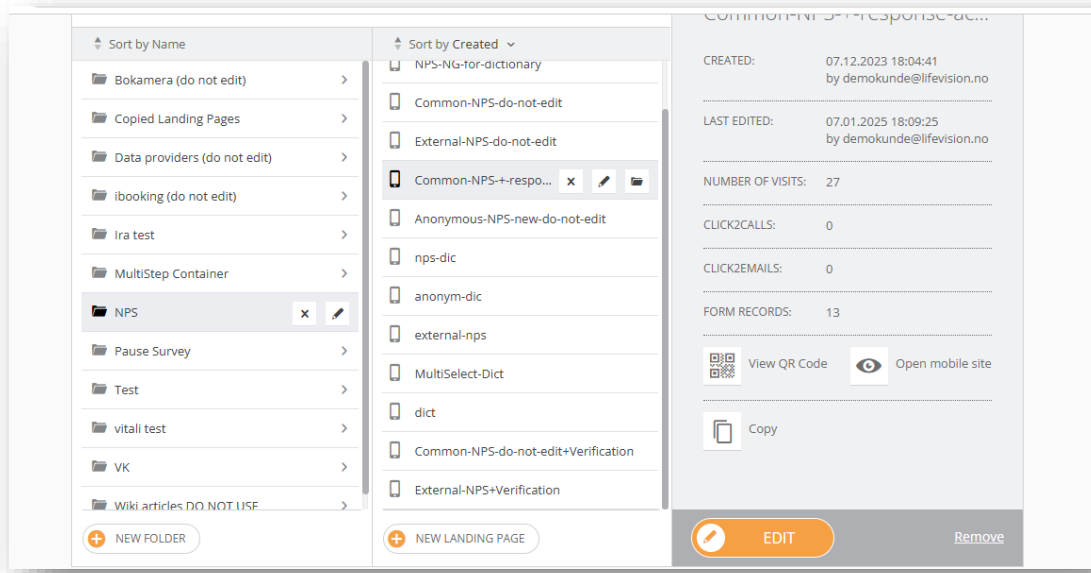
- It will have the same name and caption as its parent element, but with the next changes, the name will have a “: Comment” added and the caption will have “_comment” added. For example, NPS Q with the name “NPS_Score” and the caption “Would you recommend our services to your friends?”. The comment element will have the following values: name “NPS_Score_comment” and the caption “Would you recommend our services to your friends Comment?”



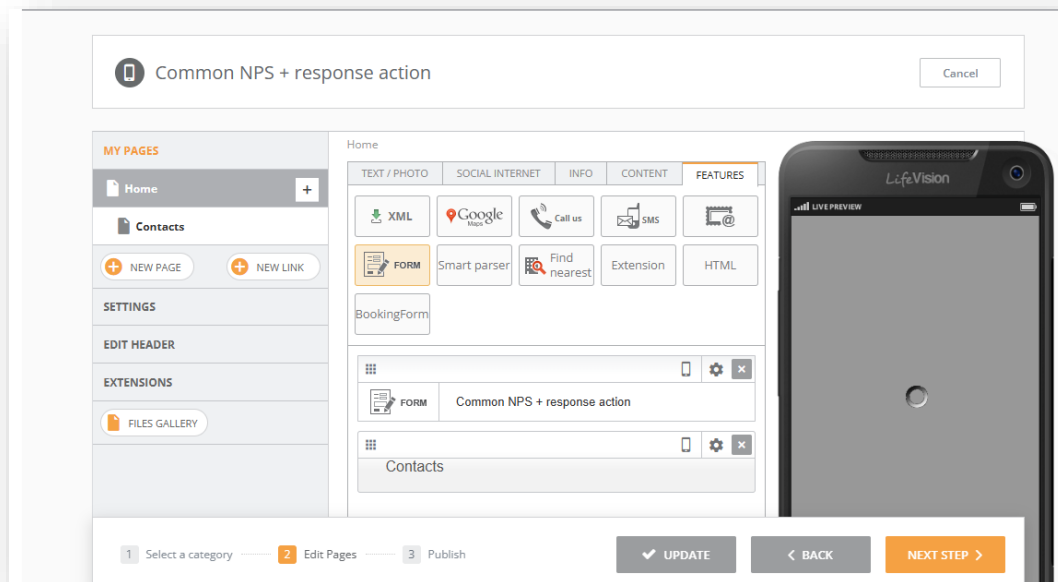
But the Name and the Caption are customizable;

Place the form onto the landing page

Create or edit an existing one



and place or change the form (to change, click 2 times on the form)



Survey Implementation

[Check the article how to send out NG Survey and gather the data.](#)

Survey Builder

Survey Builder is an all-in-one tool for creating custom surveys – including CSAT, concept testing, brand tracking, price sensitivity, campaign and advertising evaluation, as well as segmentation. With its user-friendly interface, you can easily design questions, collect responses, and gain valuable insights through interactive dashboard cards or raw data exports. You can choose from standard page designs, custom ones created by our designer, or even code them with CSS.

Surveys can be scheduled and distributed via email, SMS, or both. You can set up reminders to increase response rates and choose between anonymous or non-anonymous participation. We can use your existing customer database or gather new respondents through phone surveys as an additional feature.

Our experienced specialists also provide in-depth analysis to help you interpret results and make confident, data-driven decisions.

Contact your digital advisor regarding it.

