

# Building your own DXP - Getting started with Drupal and Mautic (workshop)

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@MauticCommunity

# Agenda

1. Demo of Mautic & Drupal in action
2. Why personalize? A global market != 1 audience
3. DIY Workshop with Mautic & Drupal
4. In Closing
5. Homework!



0. Agenda

# Demo

2. Why personalize?



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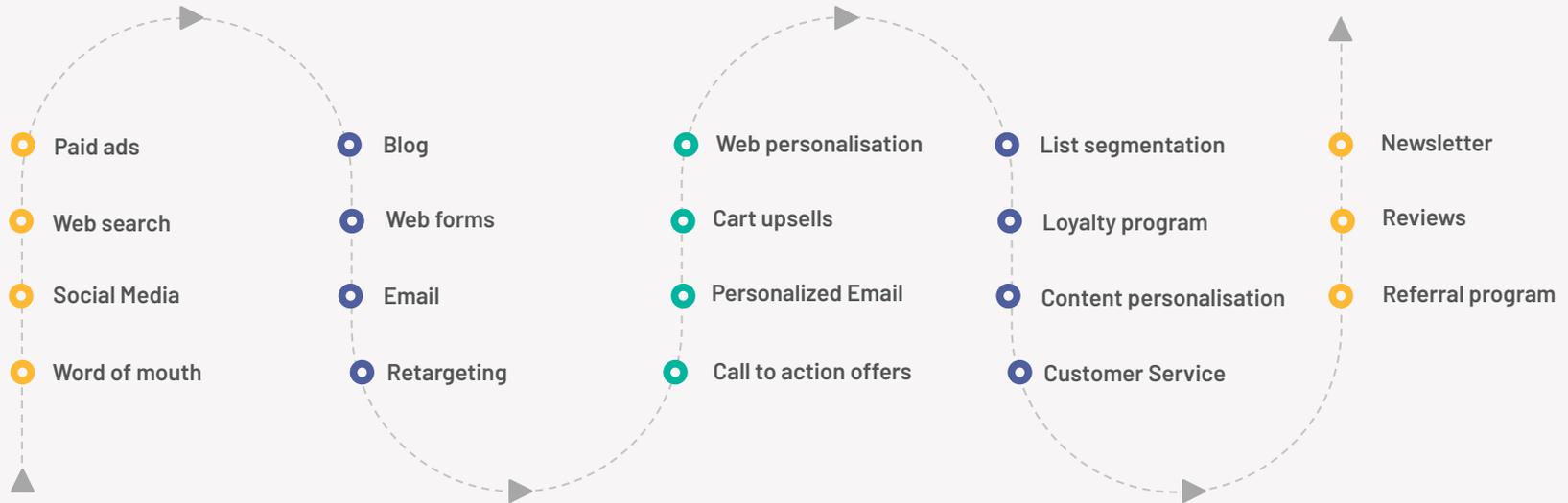
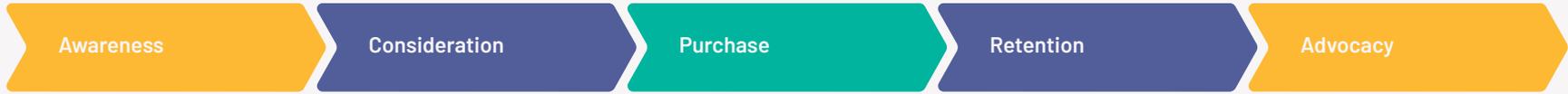
1. Demo

# Why personalize?

3. Workshop



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# Traditional Email Marketing Is **Single Channel Focused**

- Tracking email and link engagement
- No knowledge of activities on other channels
- Limited ability to track and nurture the journey of a contact through the buying cycle
- Simplistic personalisation of emails (first name), basic automation features

ables in Exc.	3 Hour Live Training on Microsoft Excel Pivot Tables - In this three-hour class you'll discover
Certificatio.	ITIL® 4 Foundation Certification Training (Include Exam Voucher) - The ITIL 4 Foundation co
oft Excel fro.	3-hour Live Virtual Training on Microsoft Excel from Beginner to Advanced - This course wil
c Manning 2	Question? - Ruth, I'm looking to learn about your customer feedback process, but instead of i
certification B.	Project Management Certification Boot Camp - The course will help you become a better pro
g Python for.	3 Days Live Training on Data Analysis using Python - In This Course we will discuss on Data
Bayani	Ruth Cheesley - Would you like to work in Dubai, UAE ? - Dubai Job Opportunities For Ruth C
cs for Data.	2 Days Live Training on Statistics for Data Science & Machine Learning - This course is mea
Training on.	3 Days Live Virtual Training on Tableau certification - You'll learn all of the features in Tablea
a azhari	Greetings dear. Nice to meet you, my name is Nashwa, I would love to get in touch with you.
iness Monthly	How to use connectivity to and drive efficiency - Connectivity is paramount to efficient work
certified Solut.	AWS Solutions Architect – Associate (SAA-C02) Certification Training - The AWS Certified S
n Gorry	great deal, Ruth - Hi Ruth - I understand that you might be extremely busy, but did you mana
alysis and V.	Master Data Analysis and Visualization in Microsoft Power BI - The instructor will begin by c
Bayani	Ruth Cheesley - Would you like to work in Dubai, UAE ? - Dubai Job Opportunities For Ruth C
g Python for.	3 Days Live Training on Data Analysis using Python - In This Course we will discuss on Data
erard	Register Your Interest; Be the first to receive a 2022 Sponsorship Media Pack - Good Aftern
Phillips	Big Data Analytics -Final Chance to Showcase Your Solutions - Good Morning, I hope this en
for Data Sci.	3 Days Live Virtual Training on Data Science and Machine Learning with Python - You will le
iness	Did you see how you can save on security with O2? - In this hybrid working era, getting the ri
Wallace	Connect with Decision-makers in retail and investment banking sectors - Verified contact de
est and Practi.	4-Hours Live Virtual Training on PMP Test and Practice Questions Review - PMP certificac
ables in Exc.	3 Hour Live Training on Microsoft Excel Pivot Tables - In this three-hour class you'll discover
seals	professional in making rubber seal parts. - Dear Sir or Madam, Hope everything goes well wi
aining on Mi.	6 Hour Live Training on Microsoft Power BI Desktop - update a running with Power BI and le
n@lead-zoom.co....	quick call, Ruth - Hi Ruth, I sent you an email a few days ago to discuss how we can help you
a West	Events with a Live Edge - Hi Ruth, I dropped you a note recently about how Outlook can help
lazzard	Prospecting and Lead Generation with Email - Hi Ruth Companies of all sizes are using emai
Health	Information on symptoms and transmission - COVID-19: Information on symptoms and trans

# Traditional Email Marketing often lands in the spam box because:

- One message sent to all - little customisation;
- Feels like 'being sold something' (which may not be relevant to you);
- Does not consider the contact's position in their journey with the brand;
- Message is often inappropriate or not of interest to the recipient => Spam!



# Marketing Automation requires a combination of **Software** and **Strategy**

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- Enables nurturing of prospects with highly personalised, useful content which helps convert them into customers
- Places the customer at the centre of everything and focused on developing a trusted relationship
- Reduces points of friction in the customer journey
- Does not end when the sale is made!

“

Today's consumers expect personalization. Brands who use **data-driven campaigns** to deliver this are seeing the results. By using **deep data** to build your personas, you're adding the **emotional and behavioral component**.

 <https://blog.globalwebindex.com/marketing/why-personalization-matters>



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2. Why Personalize?

# Workshop

<https://mau.tc/build-dxp>

4. Closing



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# Step 1 - Set up Drupal



## Method A: Gitpod

- Go to <https://gitpod.io/#https://github.com/shaal/ddev-gitpod>
- Your environment is being prepared, wait about 40 seconds (A splash screen will appear)
- VScode IDE will be displayed, a few seconds later you will see Umami demo.
  
- `ddev composer require drupal/mautic_paragraph:1.x-dev`
- `ddev composer require drupal/asset_injector`
- `ddev drush uli`

## Method B: DDEV on your localhost

- `mkdir drupaldcon22 && cd drupaldcon22`
- `ddev config --project-type=drupal9 --docroot=web --create-docroot --project-name=drupaldcon22`
- `ddev start`
- `ddev composer create "drupal/recommended-project" --no-install`
- `ddev composer require drush/drush --no-install`
- `ddev composer install`
- `ddev composer require drupal/mautic_paragraph:1.x-dev`
- `ddev composer require drupal/asset_injector`
- `ddev drush site:install demo_umami -y`
- `ddev drush uli`
- `ddev launch`

## Method C: Pure PHP / no containers

- `mkdir drupal && cd drupal && curl -sSL https://www.drupal.org/download-latest/tar.gz | tar -xz --strip-components=1`
- `composer require drupal/mautic_paragraph:1.x-dev`
- `composer require drupal/asset_injector`
- `php ./core/scripts/drupal quick-start demo_umami -s -vvv`

After setting it up, store your credentials somewhere safe!

If you get stuck on memory -> do `php --ini`, edit the ini file and replace `memory_limit = 128M` with `memory_limit = 512M`

# Step 2 - Set up Mautic



## Method A: Gitpod

- Go to <https://gitpod.io/#https://github.com/mautic/mautic/releases/tag/4.2.1>
- Your environment is being prepared, wait about 40 seconds (A splash screen will appear)
- VScode IDE will be displayed, a few seconds later you will see Umami demo.
- run **ddev exec bin/console m:a:g**
- run **ddev exec bin/console cache:clear**
- You can now login at the GitPod url using admin/mautic

## Method B: DDEV on your localhost

- `mkdir mautic && cd mautic && curl -sSL https://github.com/mautic/mautic/archive/refs/tags/4.2.1.tar.gz | tar -xz --strip-components=1`
- `ddev config --project-name=mauticdcon22`
- `ddev start`
- `ddev bin/console m:a:g`
- You can now login at <https://mauticdcon22.ddev.site> using admin/mautic

# Disable Cors protection (demo only!)

8080-mautic-mautic-au3yrpaw1ph.ws-us42.gitpod.io/s/config/edit

ptocoin Drupalchat Gorse - Open Sou... Personalizing the... DA Hotel Playacapric...

utic

Webhook Settings

Social Settings

Default format for full date

F j, Y g:i a T

Default format for date only ? \*

F j, Y

## CORS Settings

Restrict Domains ?

No Yes



# Step 3 - Prepare Drupal & install our required modules



- Go to your Drupal URL and navigate to [en/admin/modules](#)
- Enable mautic\_paragraph & asset\_injector

# Extend

List

Update

Uninstall

[Home](#) » [Administration](#)

Download additional [contributed modules](#) to extend your site's functionality.

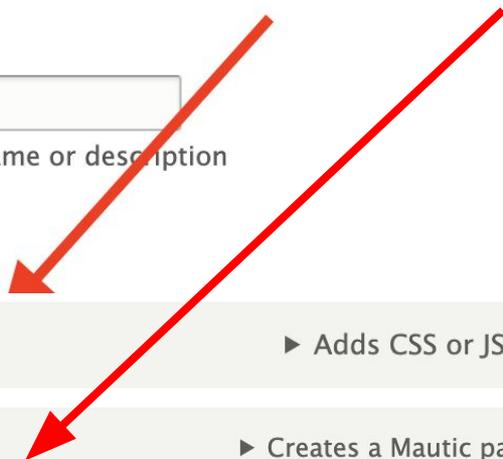
Regularly review and install [available updates](#) to maintain a secure and current site. Always run the [update script](#) e

[+ Install new module](#)

Enter a part of the module name or description

▼ [DROPSOLID](#)

- Asset Injector** ▶ Adds CSS or JS to the page output based on configurable rules.
- Mautic paragraph** ▶ Creates a Mautic paragraph Type, Mautic block Type and form



# Step 4 - Add our tracking scripts



## Js Injector

[Home](#) » [Administration](#) » [Configuration](#) » [Development](#) » [Asset Injector](#)

[+ Add Js Injector](#)



INJECTOR	CONDITIONS	OPERATIONS
There are no js injector entities yet.		



## Configuration

Cancel Save & Close Apply

System Settings

Theme Settings

API Settings

Asset Settings

Campaign Settings

Email Settings

Form Settings

Contact Settings

Landing Page Settings

Tracking Settings

Report Settings

Click

Copy (without script tags)

### Mautic tracking settings

Insert following code at the end of the web page before ending `</body>` tag. Mautic Landing Pages are tracked automatically. Use this only to track 3rd party websites.

```
<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://ideationmautic.dev.dev-2.dropsolid-sites.com/mtc.js','mt');

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

Identify visitor by tracking url ?

No  Yes

Anonymize IP ?

No  Yes

Identify visitors by IP ?

No  Yes

- [en/admin/config/development/asset-injector/js](#)
- Add the script you find in your local or Gitpod Mautic. See settings -> Tracking in mautic
- IMPORTANT -> Remove `<script>` & `</script>`
- Save

# Js Injector ☆

[Home](#) » [Administration](#) » [Configuration](#) » [Development](#) » [Asset Injector](#)

✓ Created the *mautic script* Asset Injector.

+ Add Js Injector

INJECTOR	CONDITIONS	OPERATIONS
mautic script	• Global	<a href="#">Edit</a> ▼



# Step 5 - Configure Mautic integration in Drupal



Go to Mautic -> Settings (gear icon) -> API Credentials

- Create a new Oauth 2 key
  - Redirect URI: [your Drupal URL]/mautic/callback
  - Store Client ID & Client Secret locally



admin admin



## API Credentials (Applications)

**Save your personal key & Secret**

+ New



Filter...



OAuth 2



Name

Public Key

Secret Key

ID



Drupal Integration (Nick Veenhof)

1\_5q38wc46c144o440sw4804swoscggkokc4

4ego8sm2x4aow0gw80488o40g8so8044048

1



- Go to [your GitPod URL]/en/admin/config/services/mautic
  - Connector: Oauth
  - Protocol: https
  - Base URL: [your Mautic URL]
  - Port: Empty
  - Path: Empty
  - Client ID: (value from above)
  - Client Secret (value from above)
  - Submit, login to Mautic & accept!

### Mautic Paragraph Connector \*

Basic Auth

Oauth

**Oauth!**

Choose a connector to use for this Mautic server.

#### ▼ CONFIGURE OAUTH MAUTIC CONNECTOR

⚠ Please configure the selected Mautic connector.

OAuth connector for Mautic.

HTTP protocol

**https!**

The HTTP protocol to use for sending queries.

Mautic base url \*

The base url name or IP of your Mautic server, e.g. localhost or example.com.

**Fill these fields**

Mautic port

An example port can be 3306.

Mautic path

The path that identifies the Mautic instance to use on the server.

#### MAUTIC OAUTH INTEGRATION SETTINGS

Client ID \*

Client Secret

If this field is left blank and the Client Secret was previously filled out, the current Client Secret will not be changed.

Redirect base url:

The base url of the Drupal instance to be redirected. Example: https://exampledrupal.org

✓ Successfully connected with OAuth2 authorization!

# Step 6 - Add newsletter signup form to Drupal



# Aims:

1. Encourage sign up to newsletter
2. Allow personalization by selecting interests



Create a custom field where we'll store the types of recipes the contact is interested in.

Go to **Settings > Custom Fields** and create a custom field under the Contact object, using the **Select - Multiple** type

Add **“Vegan”** & **“Gluten-Free”**

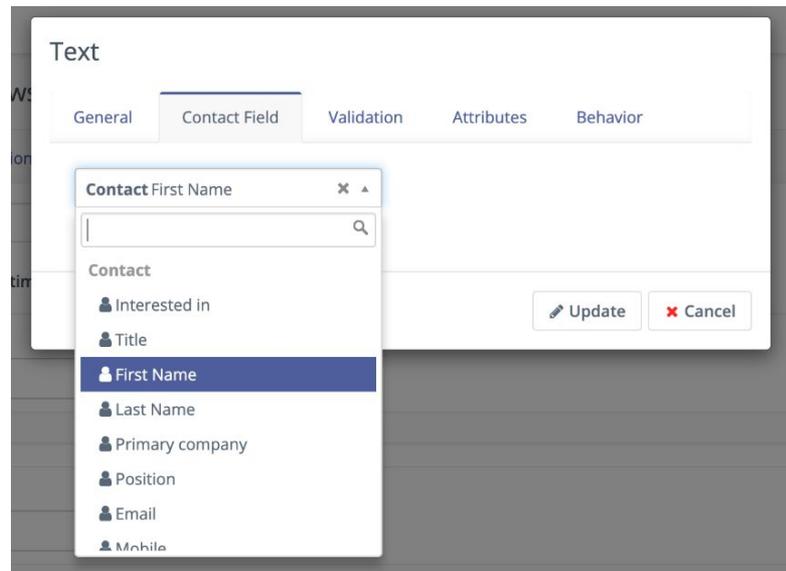
The screenshot shows the Mautic 'Edit Custom Field' interface for a field named 'Interested in'. The interface is divided into several sections:

- Header:** 'Edit Custom Field - Interested in' with 'Save', 'Save & Close', and 'Cancel' buttons.
- Form Fields:**
  - Label:** 'Interested in' (with a help icon)
  - Alias:** 'interested\_in' (with a help icon)
  - Object:** 'Contact' (dropdown)
  - Group:** 'Core' (dropdown)
  - Data Type:** 'Select - Multiple' (dropdown)
  - Default value:** 'Choose one or more...' (text input)
- Options Table:**

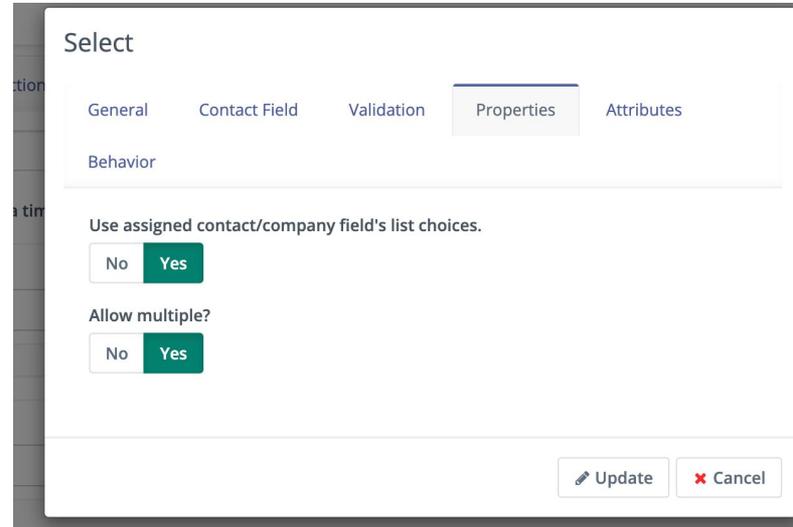
Options <span>Add a value</span>		
<input type="checkbox"/>	Vegan	vegan
<input type="checkbox"/>	Gluten free	Gluten free
- Order:** 'Interested in' (dropdown)
- Published:**  No  Yes
- Required:**  No  Yes
- Visible on forms:**  No  Yes
- Visible on short forms:**  No  Yes
- Available for segments:**  No  Yes
- Publicly updatable:**  No  Yes
- Is Unique Identifier:**  No  Yes
- Default value:** (empty text input)

Create a **form** which will allow people to join the mailing list.

- Go to **Components** -> **Forms** > **New** -> Select **Campaign** form.
- Set the title: “**Newsletter Subscription**”
- Add **Text** fields to capture first name and email address



- Add a **Select** field for recipe interests, and under the Properties tab, set both options to Yes.



The screenshot shows the 'Select' configuration dialog in Mautic, with the 'Properties' tab selected. The dialog has a title bar 'Select' and five tabs: 'General', 'Contact Field', 'Validation', 'Properties', and 'Attributes'. Below the tabs is a 'Behavior' section with the following options:

- Use assigned contact/company field's list choices.**  
 No  Yes
- Allow multiple?**  
 No  Yes

At the bottom right of the dialog are two buttons: 'Update' (with a pencil icon) and 'Cancel' (with a red X icon).

- Map the fields (under the Contact Field tab) to the relevant contact fields (using the custom field we created for interests), so that when the person submits the form, their contact profile is updated
- Edit the text shown on the submit button to 'Send me the recipes'
- **Save & Close**

## Select

General **Contact Field** Validation Properties Attributes

Behavior

Contact Interested in [X]

[Update] [Cancel]

General Attributes

Label \*

Submit

[Update] [Cancel]

Submit [Update]

- Go to your Drupal and navigate to **Structure > Block Layout**
- Go to content section & click Place Block
- Click “Add Custom Block”
- Choose “Mautic”
- Description: A wonderful newsletter full of recipes
- Title: Subscribe to our recipes
- Mautic form: Newsletter Subscription
- Submit

✚ Page title	core	Page Title	Configure
Content	<b>Place block</b> ←		
✚ Main page content	System	Content	Configure
Sidebar	<b>Place block</b>		
✚ Articles aside	Lists (Views)	Sidebar	Configure

## Place block



+ Add custom block

Filter by block name

BLOCK

CATEGORY

OPERATIONS

Page title

core

Place block

➤ [Mautic](#)

Mautic form in a block

[Home](#) » [Add custom block](#)

**Block description \***

A brief description of your block.

**Title**

**Text**

**B I** | | | | Format ▾ | Source

Text format Basic HTML ▾

**Form \***

A wonderful newsletter full of recipes

**Revision information**

No revision

**Revision log message**

The last entry explaining the changes in this revision.

### Place block

+ Add custom block

Filter by block name

BLOCK	CATEGORY	OPERATIONS
Page title	core	Place block
Primary admin actions	core	Place block
Tabs	core	Place block
A wonderful newsletter full of recipes	Custom	Place block
Umami Disclaimer	Custom	Place block
Umami footer promo	Custom	Place block
Umami Home Banner	Custom	Place block



Now we need to create a our Segments in Mautic

- Go to **Segments** and create a new **segment** called Newsletter.
- Click Save & Close
- Go to **Segments** and create a new **segment** called Vegan Recipes.
- Click Save & Close

Now we need to create a campaign in Mautic to add them to the right segments.

- Go to **Campaigns** > **New** and set the campaign title “Newsletter Signup”
- Launch **Campaign Builder**
- Select “**Campaign Source**” as Contact Source
- Select the form you just created as the source, and then add an **action** on the affirmative (+) path to **Modify contact’s Segment** > Add contact to the **Newsletter** segment and name it “**Add to newsletter segment**”

Save

Close Builder

 Vegan Newsletter Sub...

Add to newsletter segment

- Add a **condition** from the top source, name it “**If Vegan is selected**” using the **Form Field Value** option. Select the newsletter signup form in the ‘limit to forms’ dropdown.
- Select the **Food Preference Field** in the dropdown, and use the ‘**contains**’ operator, with the value ‘**Vegan**’.

### Form field value

Trigger actions when a submitted form field value suits the defined condition.

Name

Execute this event... ?

immediately  at a relative time period  at a specific date/time

Limit to Forms ? \*

Field \* Operator \* Value \*

Save

Close Builder

 Vegan Newsletter Sub...

Add to newsletter segment

if vegan is selected

- From the affirmative (+) path on this condition, add an **action** of **Modify Contact's Segments**, and select the **Vegan Recipe** segment. Name it **Add to Vegan Recipe Segment**

Modify contact's segments  
Add contact to or remove contact from segment(s)

Name

Add to vegan recipes 

Execute this event... 

immediately at a relative time period at a specific date/time

Add contact to selected segment(s)

Vegan recipes 

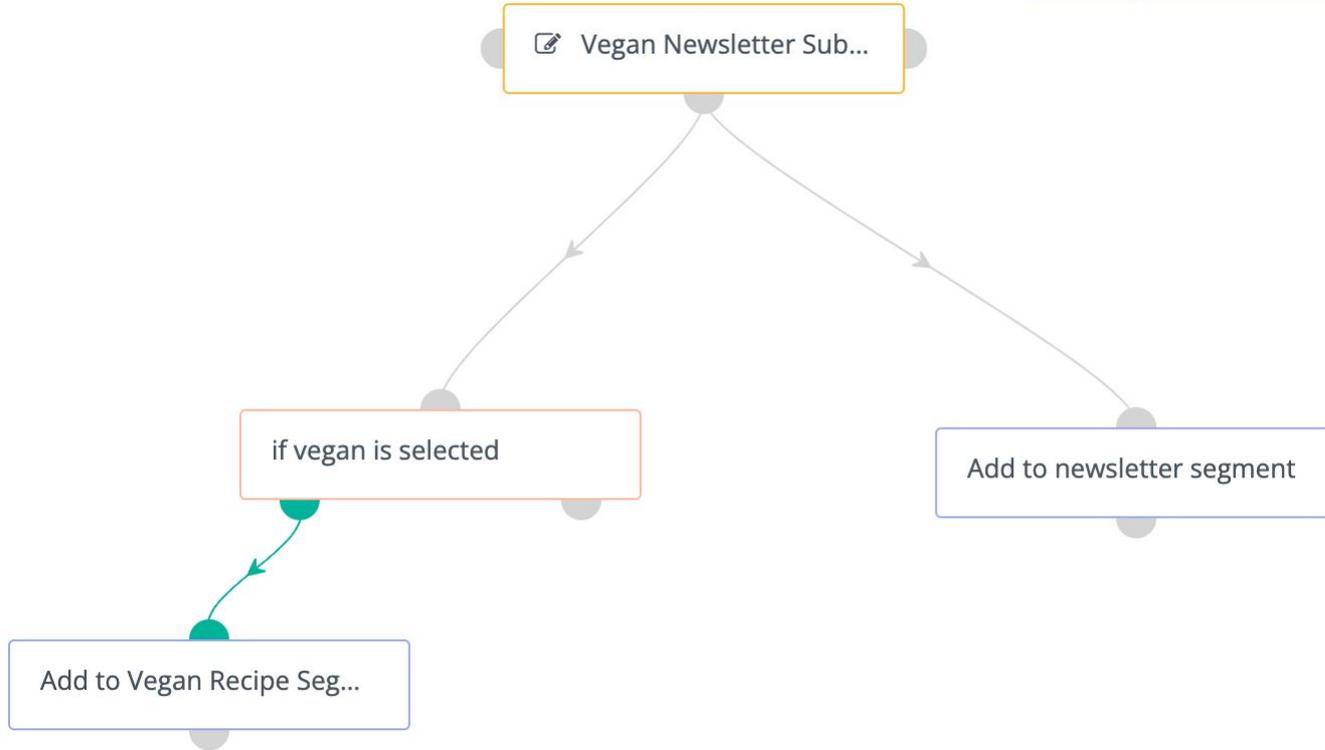
Remove contact from selected segment(s)

Choose one or more...

 Update  Cancel

Save

Close Builder



For this purpose, we are simulating a production environment. Execute the following actions

- Open your Drupal site in an incognito window
- Go to your Mautic site in the non-incognito window
- Verify if the contact is captured by going to **Contacts** and switch the toggle to see the anonymous contacts and verify if your user is captured
- Fill in the form that is on the homepage with your email address

A wonderful newsletter full of vegan recipes

Subscribe to our Vegan recipes

Thank you for signing up

**First name**

**Email**

**Food preferences**

Send me the recipes

Assumption: In a production environment, cron jobs run every 5 minutes. When we run the cron jobs, the contacts will be added to the segments. simulating production. Execute the following actions in the Gitpod Mautic CLI **SEPARATELY**

```
ddev exec bin/console m:c:r
```

```
ddev exec bin/console m:c:t
```

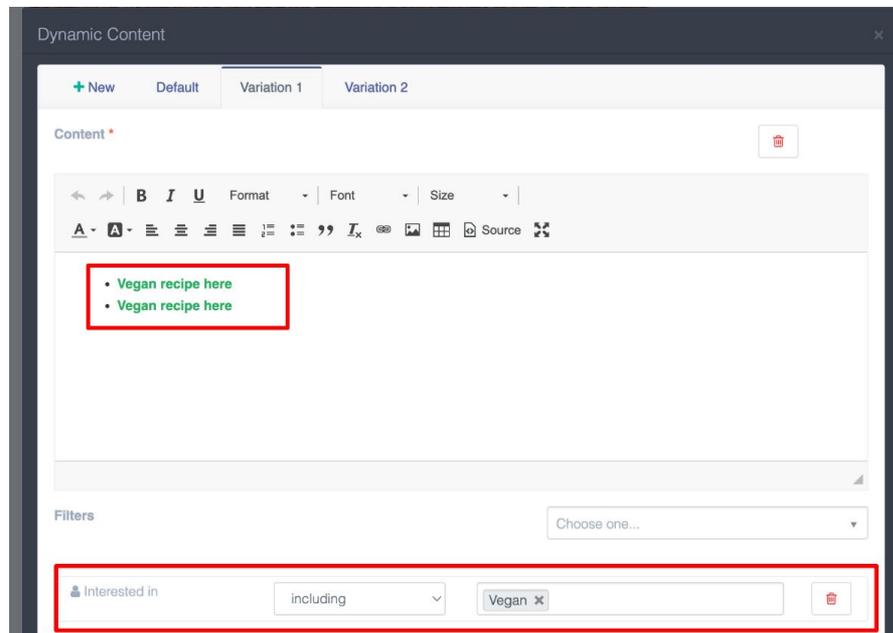
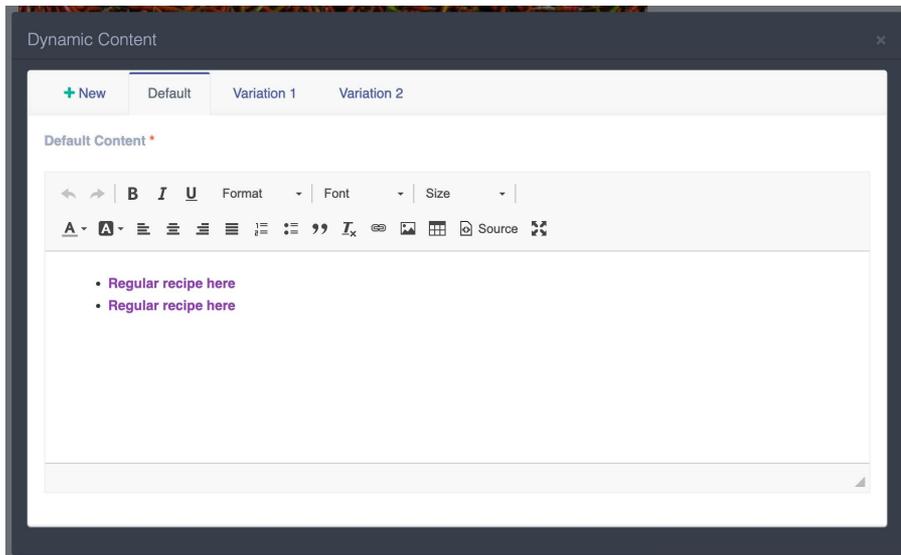
Now go to Segments and verify if your contact is in the segment

When sending out our regular mailings we can use Dynamic Content to change the information provided based on their interests.

- Create a segment email to send to this segment by navigating to **Channels** > **Email**, clicking **New**, and selecting **New Segment Email**.
- Set Subject to “Newsletter”
- Set Internal name to “Newsletter”
- Select the Newsletter segment
- Select the Paprika template and click Builder at the top of the page

The screenshot displays the Mautic email builder interface. On the left is a dark sidebar menu with the Mautic logo at the top and various navigation options: Dashboard, Calendar, Contacts, Companies, Segments, Components, Campaigns, Channels, Marketing Messages, Emails, Focus Items, Social Monitoring, Points, Stages, Reports, and Tags. The main content area shows a grid of email templates. The 'Paprika' template is highlighted with a red box. To the right of the template grid is a configuration panel with the following fields: 'Subject' (Our latest recipes), 'Internal Name' (Our latest recipes), 'Contact segment' (Newsletter X, highlighted with a red box), 'Category' (Uncategorized), 'Language' (English), 'Is a translation of' (Choose a translated item...), 'Published' (No/Yes buttons), 'Publish at (date/time)', 'Unpublish at (date/time)', and 'Unsubscribe feedback form' (Choose one...).

- Drag in a Dynamic Content block from the right hand side (bottom right)
  - Create default content (sent to all who are not filtered)
  - Create a variant for people interested in vegan recipes using the filter
  - Save and close the email



- Create two contacts manually to test the sending with:
  - Test contact
  - Test vegan contact
- Manually add both contacts (so we don't have to wait for the cron jobs to fire) to the newsletter segment by selecting them both in Contacts and going to Manage Segments in the multi-select dropdown menu
- Add the vegan contact to the Vegan Recipes segment
- Send the email by opening the email and clicking on Send.
- Check for the difference in content (use Mailhog by accessing port 8027 to view the emails)

Gitpod Workspace

Ports

- 3306 open (private)
- 8027 open (private)
- 8036 open (private)
- 8080 open (public)



8027



Admin Mautic

Newsletter **PUBLISHED**



Newsletter

DETAILS

Contact segments comparison

From Mar 27, 2022 To Apr 27, 2022 Save





Connected

Inbox (3)

Delete all messages

Show headers

From DDEV <mautic@ddev.local>  
Subject **Our latest recipes**  
To Test <test-vegan@example.com>

HTML Plain text Source MIME

### Jim

Jim is a chaos monkey.  
[Find out more at GitHub.](#)

Enable Jim

nec, pellentesque eu, pretium quis, sem.

Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies

- [Vegan recipe here](#)
- [Vegan recipe here](#)



Lorem ipsum dolor



Lorem ipsum dolor



Lorem ipsum dolor

### Lorem ipsum dolor



Lorem ipsum dolor sit amet, consectetur adipiscing elit.



Connected

Inbox (3)

Delete all messages

## Jim

Jim is a chaos monkey.  
[Find out more at GitHub.](#)

HTML

Plain text

Source

MIME

From DDEV &lt;mautic@ddev.local&gt;

Show headers ▾

Subject **Our latest recipes**To **Test No preference <test-nopref@example.com>**

HTML Plain text Source MIME

nec, pellentesque eu, pretium quis, sem.

Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies

- Regular recipe here
- Regular recipe here



Lorem ipsum dolor



Lorem ipsum dolor



Lorem ipsum dolor

## Lorem ipsum dolor

Lorem ipsum dolor sit amet,  
consectetur adipisicing elit.

# Outcome:

Anyone in the Vegan Recipes segment will receive customised recipes to their interests. Others will receive the default list.



**Done!**



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4. Workshop

# Closing



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<https://contribute.mautic.org/>



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Are there any...

# Questions?

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[ruth.cheesley@mautic.org](mailto:ruth.cheesley@mautic.org) / [nick.veenhof@gmail.com](mailto:nick.veenhof@gmail.com)

Find us on Slack, the Acquia Booth or Twitter  
(@RCheesley / @Nick\_vh) for more Q&A!



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**Homework: Learn >  
Convert > Personalize**



# Aims:

1. Understand intent
2. Prompt to sign up for recipes email alert
3. Personalise email content



# Understanding intent

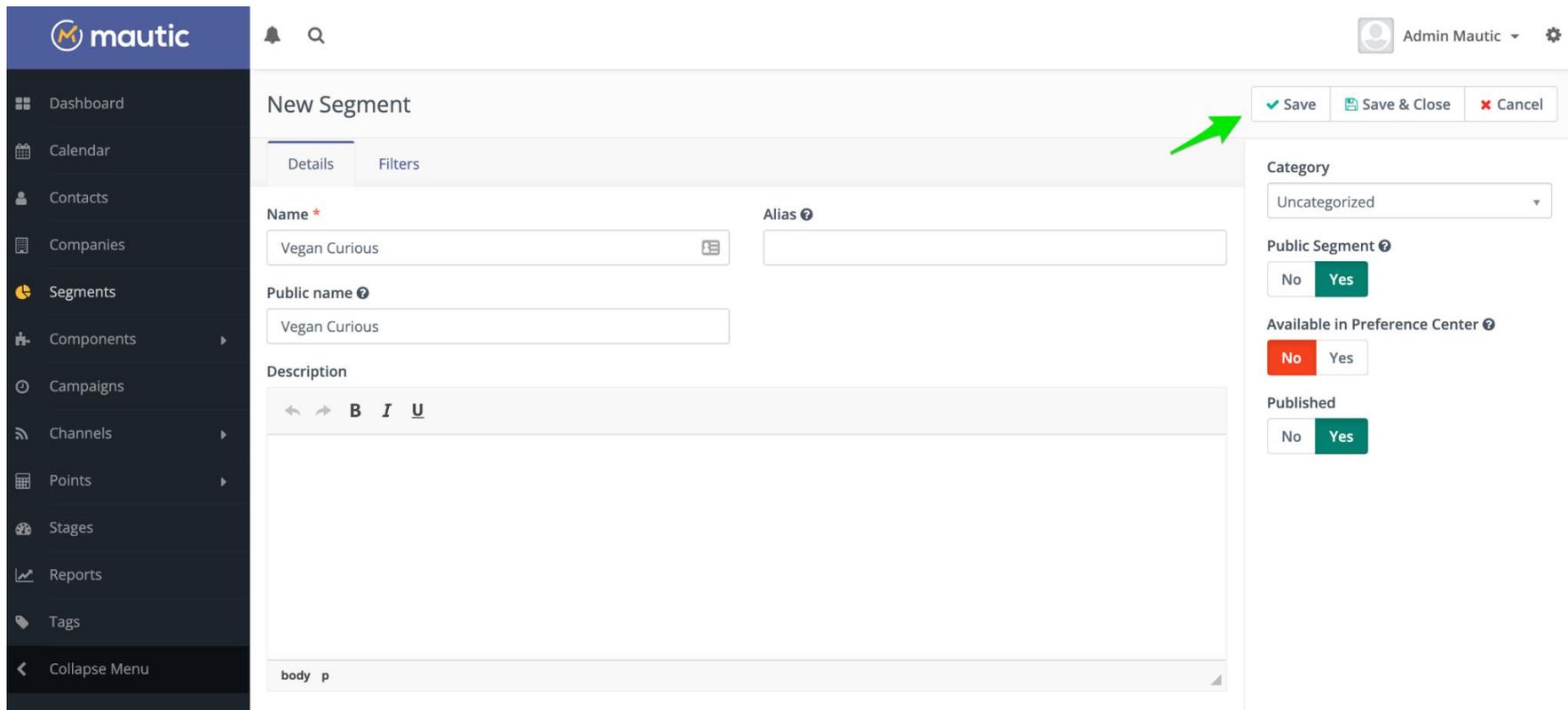


Go to your Mautic instance, and log in with admin/mautic

Create a dynamic segment using the filter of Visited any URL with X page title > contains > vegan and do not make it visible on the preference centre

The screenshot shows the Mautic user interface for editing a segment named "Vegan curious". The left sidebar contains navigation options: Dashboard, Calendar, Contacts, Companies, Segments, Components, Assets, Forms, Landing Pages, and Dynamic Content. The main content area is titled "Edit Segment - Vegan curious" and has two tabs: "Details" and "Filters". A blue informational box states: "Any applicable contacts that match the filters will be added, and contacts that no longer match will be removed. Contacts that were manually added will remain part of the list regardless of filters." Below this is a dropdown menu labeled "Choose one...". A filter rule is highlighted with a red box: "Visited any URL with X page title" with the operator "contains" and the value "vegan". To the right of the filter rule is a trash icon. On the right side of the interface, there are three sections: "Category" (set to "Uncategorized"), "Public Segment" (with "Yes" selected), and "Available in Preference Center" (with "No" selected, highlighted by a red box). The "Published" section has "Yes" selected. At the top right, there are buttons for "Save", "Save & Close", and "Cancel". The top right corner also shows "Admin Mautic" and a settings gear icon.

# Remember to press Save or Save and Close!



**mautic** Admin Mautic

## New Segment

Details Filters

**Name \***  **Alias**

**Public name**

**Description**

← → **B** *I* U

body p

Save  Save & Close  Cancel

**Category**

**Public Segment**  
 No  Yes

**Available in Preference Center**  
 No  Yes

**Published**  
 No  Yes



# Outcome:

Anyone who visits a page containing 'vegan' in the page title, will be added to the 'Vegan Curious' segment.

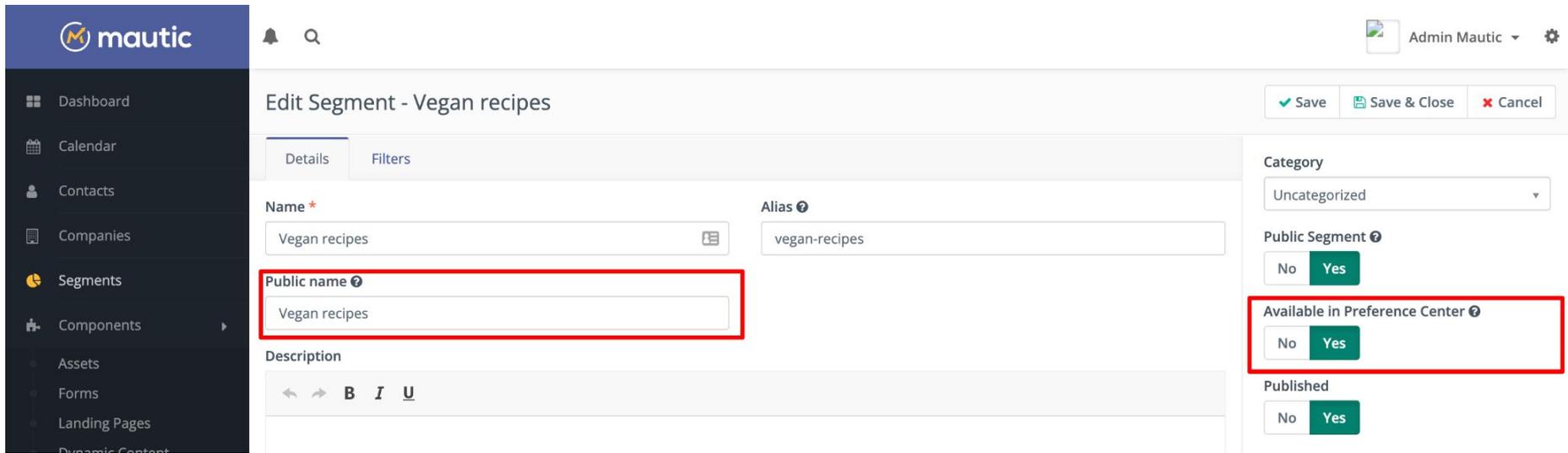


# Interest-based newsletter prompt



Now create a segment called Vegan recipes and do **not** set up any filters, but DO set it to be available in the preference centre.

Remember that they will see the 'Public name' in the preference centre to select from, so make it customer-friendly.



The screenshot shows the Mautic interface for editing a segment named "Vegan recipes". The left sidebar contains navigation options: Dashboard, Calendar, Contacts, Companies, Segments, Components, Assets, Forms, Landing Pages, and Dynamic Content. The main content area is titled "Edit Segment - Vegan recipes" and includes tabs for "Details" and "Filters". The "Details" tab is active, showing fields for "Name" (Vegan recipes), "Alias" (vegan-recipes), "Public name" (Vegan recipes), and "Description". The "Public name" field is highlighted with a red box. On the right side, there are settings for "Category" (Uncategorized), "Public Segment" (Yes), "Available in Preference Center" (Yes), and "Published" (Yes). The "Available in Preference Center" checkbox is highlighted with a red box.



Create a custom field where we'll store the types of recipes the contact is interested in.

Go to Settings > Custom Fields and create a custom field under the Contact object, using the Select-Multiple type

Add some options - for example vegan, gluten free etc

The screenshot shows the Mautic 'Edit Custom Field' interface for a field named 'Interested in'. The interface is divided into several sections:

- Header:** 'Edit Custom Field - Interested in' with 'Save', 'Save & Close', and 'Cancel' buttons.
- Form Fields:**
  - Label:** 'Interested in' (with a help icon)
  - Alias:** 'interested\_in' (with a help icon)
  - Object:** 'Contact' (dropdown)
  - Group:** 'Core' (dropdown)
  - Data Type:** 'Select - Multiple' (dropdown)
  - Default value:** 'Choose one or more...' (text input)
- Options Table:**

Options <span>Add a value</span>		
<input type="checkbox"/>	Vegan	vegan
<input type="checkbox"/>	Gluten free	Gluten free
- Order:** 'Interested in' (dropdown)
- Published:**  No  Yes
- Required:**  No  Yes
- Visible on forms:**  No  Yes
- Visible on short forms:**  No  Yes
- Available for segments:**  No  Yes
- Publicly updatable:**  No  Yes
- Is Unique Identifier:**  No  Yes
- Default value:** (empty text input)



Now let's create a form which will show to people in this segment, prompting them to join our vegan recipes mailing list.

- Go to Components > Forms > Create and select Standalone form
- Add fields to capture first name and email address
- Map the fields to the relevant contact fields, so that when the person submits the form, their contact profile is updated



- Add a hidden field using the custom field we just created, setting the default value to vegan
- Edit the text shown on the submit button to 'Send me the recipes'
- Add a form action to Modify contact's segments, and add them to the Vegan recipes segment we just created.
- Click Save & Close



## Edit Form - Vegan newsletter signup

Details Fields Actions

Add a new field

Maximum fields displayed at a time \* unlimited

First name \*



First Name

Email address \*



Email



Category

Uncategorized

Published

Publish at (date/time)

Unpublish at (date/time)

Disable search indexing

Kiosk Mode

Render style from Template?

Theme

Choose one...

Add a new submit action

Add to vegan newsletter

### Modify contact's segments

Name

Add to vegan newsletter

Description

← → **B** *I* U

Add contact to selected segment(s)

Vegan recipes ✕

Remove contact from selected segment(s)

Choose one or more...

✎ Update

✕ Cancel

✓ Save

📄 Save & Close

✕ Cancel

Category

Uncategorized

Published

No **Yes**

Publish at (date/time)

Unpublish at (date/time)

Disable search indexing

**No** Yes

Kiosk Mode ?

**No** Yes

Render style from Template? ?

No **Yes**

Theme ?

Choose one...



Now create a **Focus Item** notification to show the form when people are in the vegan curious group.

Go to **Channels > Focus Items** and create new.

- Name: Interested In Vegan

Click Builder (top right), and set the following options:

- **Type:** Collect data
- **Style:** Notification;
  - **Placement:** Bottom right
- **Colors:** As you choose, to match the demo site use **#da3c13** for primary and **#78bd8f** for button color, with **#827a7a** for text color



- **Content:**

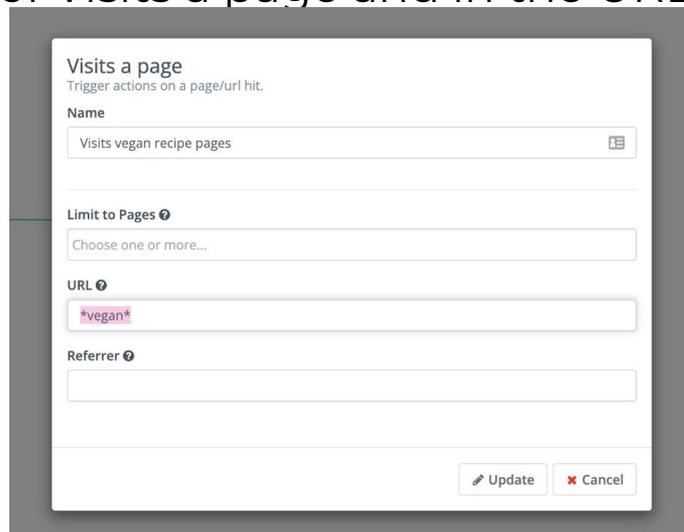
- **Headline:** Want to be the first to hear when we publish new Vegan recipes?
- **Tagline:** Join our Vegan recipes mailing list
- **Form:** Select the form created above
- **Custom CSS:**
  - Add some styling to give a gap between the text entry fields:  

```
.mauticform-row {margin-bottom: 10px;}
```
- Close the builder & publish & save & close the focus item



Now we need to create a campaign to publish this focus item only for people who are in the vegan curious segment.

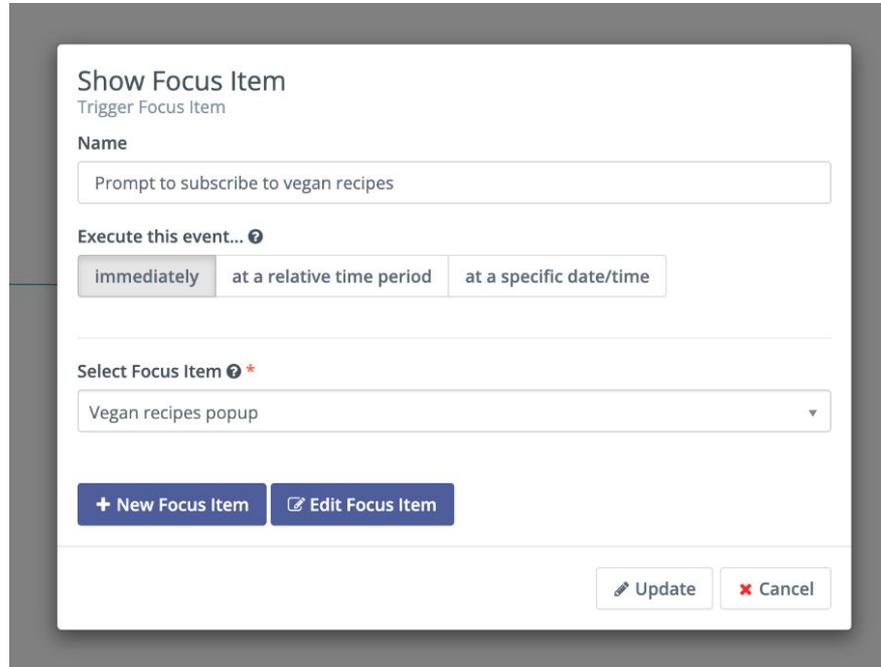
- Go to Campaigns > New, set the title to “Interested In Vegan” & Launch the campaign builder
- Select the Vegan Curious segment as the source
- Set a “**Decision**” of Visits a page and in the URL enter: \*vegan\*



The image shows a screenshot of the Mautic 'Visits a page' trigger configuration form. The form is titled 'Visits a page' and has a subtitle 'Trigger actions on a page/url hit.' Below the title, there are several input fields: 'Name' with the value 'Visits vegan recipe pages', 'Limit to Pages' with a dropdown menu showing 'Choose one or more...', 'URL' with the value '\*vegan\*', and 'Referrer' which is empty. At the bottom right of the form, there are two buttons: 'Update' and 'Cancel'.



On the affirmative track (+), add an action of 'Show focus item' and select the focus item you just created.



The screenshot shows a configuration window titled "Show Focus Item" with the subtitle "Trigger Focus Item". It contains the following elements:

- Name:** A text input field containing "Prompt to subscribe to vegan recipes".
- Execute this event... ?**: Three buttons: "immediately" (selected), "at a relative time period", and "at a specific date/time".
- Select Focus Item ? \***: A dropdown menu with "Vegan recipes popup" selected.
- Buttons:** "+ New Focus Item" and "Edit Focus Item" (with a pencil icon).
- Footer:** "Update" (with a pencil icon) and "Cancel" (with a red X icon) buttons.



# Outcome:

Anyone in the 'vegan curious' segment will see a notification prompting them to join the vegan recipes newsletter if they access a page with vegan in the url.



# Personalize email content



@MauticCommunity

