

# WEBTRAX – TURN WEBSITE TRAFFIC INTO ACTION



WebTrax gives you the power to identify website visitors and automatically send them an email and/or direct mail communication based on website behavior. You can use one of your greatest assets – your website – to strengthen and deepen relationships through timely, relevant communications.

## ASSEMBLY

- This on-premise application gives you the ability to monitor your website visitors and allows for real-time triggered communications.
- Marketers can create rules to send both emails and direct mail communications that correspond to website activity.
- WebTrax adds website monitoring and tracking ability, rounding out full marketing automation capability through print, email, SMS, and your website.

## ANALYSIS

- No matter what your goal may be, you can turn any website visit into a specific response. For example, when an identified visitor views your mortgage page three times or more within 24 hours, you can automatically send an email and/or direct mail with a special mortgage financing offer.
- WebTrax's robust tracking dashboard allows you to view the productivity generated by your website.

## ACTION

- With WebTrax, you can send branded, automatic emails and/or direct mail at any time. This means that even when your office is closed, you are still communicating.
- WebTrax comes complete with dashboard views of all relevant click behavior.

**OUR MISSION.** To make it easier for you to assemble, organize and translate complex data, behaviors and needs into actionable solutions.

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**MARQUIS**

# REQUIREMENTS

- WebTrax is a feature of the DocuMatix Product Suite version 3.1 and above. Use of WebTrax may require an addition to your agreement.
- DocuMatix on Demand is required to make use of automated marketing.

## SETUP

- WebTrax JavaScript Reference must be added to each page being tracked on the website. The entire website may be tracked by adding this code to the footer, header, or master template.
- The financial institution domains would be added as tracked domains within DocuMatix Product Suite.
- The website pages that a financial institution would like to take action upon within a marketing automation tree are configured in DocuMatix Product Suite. The page configuration can be defined by URL or page title.
- After the WebTrax JavaScript reference is on the website page(s), the financial institution will send an email with a link to a page that contains the JavaScript reference. As customers/members click on the email link, WebTrax will match the visitor to their email address and identify their past behavior on the website. Current and future behavior will be associated with that customer/member, as well.

## UTILIZATION

Once visitor data has been gathered and analyzed, WebTrax page views can trigger communication by email and/or direct mail.

- Marketing automation takes behavior rules, subscription preferences, bounce-backs, and max sends into consideration to target communications effectively.
- Pages may be grouped together to allow tracking by topic.
- Page views may be tracked before they are linked to a customer/member. Once a customer or member is identified, their past page views will be associated with their account. Webpage visits are available for viewing through WebTrax reports.