Marketing Handbook

Build a consented contact base, target it with static lists or live segments, send email and SMS campaigns through the platform's messaging hub, and capture leads from public web forms straight into CRM.

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Reference

The Marketing module is where you reach your audience and where new leads come in. You keep a base of **marketing contacts** with their consent recorded, gather them into **audiences** (either fixed lists or live segments), and send them an email or SMS **campaign**. On the way in, **lead-capture forms** let people on your website leave their details, which land as a contact and a CRM lead automatically.

This is more than a bulk-send tool. It is a lean but genuine marketing engine with a consent-first spine: no campaign can reach a contact who has not granted consent for that channel, every send is checked against the platform's suppression list first, and SMS is costed and gated before it goes out. This guide describes IXL CORE **version 1.0**.

Overview

Marketing covers four connected areas:

- **Contacts** — the people you may market to, each carrying separate email and SMS consent and a record of how that consent was obtained.
- **Audiences** — the group a campaign targets, as either a **static list** you curate by hand or a **dynamic segment** resolved live from a filter.
- **Campaigns** — a named email or SMS message that you compose, pre-flight for compliance and cost, then launch now or schedule for later.
- **Lead-capture forms** — public web forms that turn a visitor's submission into a consented contact and a CRM lead.

Everything is scoped to your organisation, governed by permissions, and — because Marketing is a paid platform capability — gated behind a `marketing` entitlement (see Access & permissions).

Contacts & consent

A **contact** is a person you may market to. Each needs at least an **email address or a phone number** (a name, company, source and free-form tags are optional). Contacts are deduplicated within your organisation, so the same email or number never creates two records.

Consent is the heart of the module. Email consent and SMS consent are tracked **separately**, each moving through the states **unknown**, **granted**, **denied** or **withdrawn**. A contact is only ever sendable on a channel whose consent is **granted** — an unknown or withdrawn contact is quietly skipped, never mailed. When consent is granted the system stamps the **source, timestamp and purpose** as a compliance record, so you can always show how and why you were permitted to reach someone.

You can add contacts one at a time, **import them in bulk from a CSV**, or let them arrive through a lead-capture form. An import never fabricates consent: a row's consent comes from the file, and by default an imported contact stays unknown (and so not sendable) until consent is on record.

An explicit **opt-out** withdraws consent for a channel immediately and, crucially, also arms the platform's messaging **suppression list** for that address or number. That closes the gap where a message was already queued before someone unsubscribed — the send pipeline re-checks suppression at delivery time and drops it. Re-granting consent lifts that suppression again. Every consent change is written to the audit trail.

Audiences — static lists & live segments

An **audience** is who a campaign goes to, and it comes in two kinds.

A **static list** is a named audience you curate by hand — "April newsletter", say — by adding and removing contacts. Membership is fixed until you change it.

A **dynamic segment** holds no members at all: it stores a **filter**, and its members are resolved live every time you view or send it, so it is always current. You can filter by **tags** (any-of or all-of), **contact source**, **email or SMS consent state**, or **channel eligibility** (has an address or number *and* granted consent for that channel). Before you commit, you can **preview** any audience — a live count plus a sample of who it resolves to — and you can preview an ad-hoc segment filter before saving it as an audience at all.

Campaigns

A **campaign** is a single email or SMS message with a name, an optional objective, its content and the audience it targets. Every campaign starts as a **draft** so you can compose, review and revise it. A draft or scheduled campaign can still be edited; once it has begun sending it is locked, keeping the record of what actually went out honest.

When you build a campaign you set:

- **Name** and an optional **objective** — how you recognise it and why you are sending it.
- **Channel** — email or SMS, fixed when the campaign is created.
- **Subject** and **HTML body** for email, or a plain-text **body** for SMS.
- **Audience** — the static list or dynamic segment to reach.
- **Schedule** — an optional future send time; leave it blank to send on demand.

Pre-flight — see the compliance and cost picture before you send

Before launching you can run a **pre-flight**. Without sending anything, it resolves the audience and sorts every contact into mutually exclusive buckets: **eligible**, **suppressed** (on the platform's bounce/complaint/opt-out list), **no-consent**, and **unreachable** (no address or number for the channel). For an SMS campaign it also **estimates the credit cost** and tells you whether your wallet can cover it. This is the honest picture of what a send will actually do.

Launching — consent-first, metered and safe

Launching a campaign is deliberately careful:

- **Email** goes out through the platform's messaging hub, bundled with the rest of your platform email — it is not charged per message.
- **SMS** is **metered**: each eligible recipient debits SMS credits (priced by segment count with the platform margin applied). If the wallet cannot cover the send it is **blocked before launch** — you top up and try again.
- A **large send** (a high number of eligible recipients) needs an explicit **confirmation** before it proceeds — a cheap guard against an accidental blast.
- A campaign with a **future schedule** is parked in a scheduled state and picked up automatically when it falls due, running through the exact same send path. A scheduled or draft campaign is the only state you can launch from — once sent, it cannot be sent again.

Sending is **idempotent and race-safe**: a recipient is materialised at most once per campaign, and a concurrent double-launch is rejected rather than double-sending or double-charging.

Delivery tracking

As a campaign runs, every recipient gets its own record with a **status** — **queued**, **sent**, **failed**, **suppressed** or **skipped (no consent)** — and, where relevant, the reason. The campaign carries a **stats snapshot** you can read back: how many were queued, how many were suppressed, how many had no consent, and the total recipients resolved. Opening a sent campaign shows the per-recipient list — name, email or phone, status and reason — so you can see exactly who was reached and who was intentionally skipped, and why.

Lead-capture forms

A **form** is a public web form you build to gather leads. You define its **fields** (text, email, phone, company and message types), a **consent statement** and which channels that consent covers, and optionally attribute the form to a campaign. Each form has an opaque **public key** — the only credential needed to embed it — and a live **summary** of views, submissions, contacts created, leads handed to CRM and how many submissions carried consent, along with a conversion rate.

The public submit endpoint is unauthenticated but hardened: an unknown or inactive key returns a plain 404 with no enumeration hint, submissions are rate-limited, a hidden **honeypot** field silently absorbs bots, only declared fields are read, and the raw visitor IP is never stored (only a salted hash). A form that requires consent will not capture a lead without the opt-in ticked.

When a valid submission arrives, it does two things in one safe, idempotent step: it **upserts a marketing contact** (deduped by email or phone, recording the granted consent with its proof), and it **creates or updates a CRM lead** with the captured details, source and campaign attribution. A repeat submission updates the same contact and lead rather than spawning duplicates.

Access & permissions {#access-and-permissions}

Every Marketing action is governed by a capability, and viewing is always separate from managing. Someone can be allowed to see contacts, audiences, campaigns or forms without being able to create, edit, send or delete them. Capabilities are grouped by area — audiences and contacts, campaigns, and forms — and are enforced on every request, not merely hidden in the interface. On top of that, the whole module is gated behind the platform's `marketing` **entitlement**, so it only appears for organisations whose plan includes it.

How Marketing connects

Marketing sits on the shared platform foundation rather than standing apart:

- **Sending runs through the platform Communication Hub.** Email and SMS both go out through the same hub that powers the rest of IXL CORE, with one suppression list and one SMS meter — Marketing invents no second sender and no second wallet.
- **Suppression and opt-outs are honoured everywhere.** When a contact opts out or an address bounces, that is recorded centrally and respected on every future campaign automatically.
- **Leads flow into CRM.** A form submission does not stop at Marketing — it opens or updates a real CRM lead, carrying its source, consent and campaign attribution, so a marketing enquiry becomes a sales record in the same motion.

That connection is the point: consent is captured once and trusted everywhere, sending reuses the platform's money-safe messaging, and the leads you gather land where your team already works.

How-to guides

Build lists and dynamic segments

Group your marketing contacts into static lists or filter-based dynamic segments so campaigns can target them.

Audiences are how you decide who a campaign reaches. IXL CORE gives you two kinds: a **static list** you populate by hand, and a **dynamic segment** whose members are worked out live from a filter every time you preview or send.

Before you start

- You need the marketing capability and the `marketing` entitlement on the organisation; without them the panels are hidden.
- Add or import your marketing contacts first — an audience only groups contacts that already exist.
- Decide which kind you need: a static list (a fixed hand-picked set) or a dynamic segment (a rule that resolves itself).

Steps

1. Open the **Marketing** workspace and select the **Audiences** tab.
2. Choose **New audience**.
3. Enter a **Name** and an optional **Description**.
4. Pick the type: **Static list** or **Dynamic segment**.[screenshot: New audience dialog showing the Static list / Dynamic segment choice]
5. For a **dynamic segment**, set your filter. Supported filters are tags (any / all), email consent state, SMS consent state, channel-eligible (email or sms) and source. A dynamic segment holds no member rows — its filter is resolved live at preview and send time.
6. Choose **Save audience**.
7. For a **static list**, open the audience and add contacts. Adding is idempotent — a contact belongs at most once, and only contacts from this organisation can be added.[screenshot: Static list with the contact picker and member count]
8. Use **Preview** to see the live count and a sample of members, including each contact's email and SMS consent state.

Result

Your audience appears in the Audiences list with its resolved member count. Static lists keep the members you added; dynamic segments recompute their membership every time. The audience is now selectable when you create a campaign.

Related

- Record and manage marketing consent
- Create and send a campaign
- Publish a lead-capture form
- Marketing reference

Record and manage marketing consent

Capture per-channel email and SMS consent so campaigns only ever reach contacts who have granted it.

Marketing in IXL CORE is consent-first. Each contact carries a separate consent state for email and for SMS, and a campaign send may only ever reach a contact whose consent for that channel is **granted**. Every other state — including the default **unknown** — is blocked.

Before you start

- You need the marketing capability and the `marketing` entitlement to manage contacts and consent.
- Understand the four states per channel: **unknown** (the default, not sendable), **granted** (the only sendable state), **denied**, and **withdrawn**.
- Only ever record consent you genuinely hold — imported rows keep the consent from the file and default to unknown, which is not sendable.

Steps

1. Open the **Marketing** workspace and select the **Audiences** tab, then **Add contact** (or edit an existing one).
2. Enter the contact's details. A contact needs at least an **email** or a **phone number**.
3. Set the **email consent** and **SMS consent** states. Choosing **Granted** stamps the consent source and timestamp as the compliance record.[screenshot: Contact editor showing per-channel Granted toggles and Consent source]
4. Optionally record a **consent purpose**, **consent source** and **consent proof** to evidence the opt-in.
5. Choose **Save contact**. New contacts start at **unknown** on both channels until you grant.
6. To unsubscribe a contact from a channel, open it and use **Opt out**, choosing **email** or **sms**. This withdraws consent immediately and arms the Communication Hub suppression backstop, so even a message already queued before the opt-out is blocked.[screenshot: Opt out control with the email / SMS channel choice]

Result

The contact's per-channel consent is recorded and audited. Only channels showing **granted** are sendable; the rest are excluded automatically at send time. If a previously opted-out contact is later re-granted, the earlier suppression is lifted so they can be reached again.

Related

- Build lists and dynamic segments
- Create and send a campaign
- Publish a lead-capture form
- Marketing reference

Create and send a campaign

Draft an email or SMS campaign, run a compliance pre-flight, and send it now or on a schedule.

A campaign is a single email or SMS send to an audience. IXL CORE is a consent-first bulk sender, not a large automation suite — you build one message, target one audience, and send it once (now or scheduled). Consent and suppression are enforced at send time, and SMS is metered against your wallet.

Before you start

- You need the marketing capability and the `marketing` entitlement, plus manage rights to send.
- Build the target audience first (see Build lists and dynamic segments).
- Make sure your contacts have **granted** consent on the channel you are sending — only they are sendable.

Steps

1. Open the **Marketing** workspace, select the **Campaigns** tab, and choose **New campaign**.
2. Enter a **Name**, an optional **Objective**, and pick the **Channel** (email or sms). The channel is fixed once created.
3. Select the **Audience**.
4. For **email**, fill in the **Subject** and **Body (HTML)**; a plain-text fallback is optional. For **SMS**, enter the **Message text**.
5. Optionally set **Schedule send** — leave it blank to send as soon as you launch, or set a future time to park the campaign until then.
6. Choose **Create**, then open the campaign and select **Run pre-flight**.[screenshot: Compliance pre-flight showing Eligible, No consent, Suppressed and Total in audience]
7. Review the pre-flight buckets — **Eligible**, **No consent**, **Suppressed**, and **Total in audience** (they partition the audience exactly). For SMS you also see the **Estimated SMS credits**.
8. Choose **Launch** (or **Schedule send** for a future time). A large send asks you to **Confirm & launch (large send)**.[screenshot: Launch button with the pre-flight summary above it]

Result

Eligible contacts are queued and dispatched through the Communication Hub; no-consent and suppressed contacts are recorded and never sent. An SMS send the wallet cannot cover is blocked before launch — top up and retry. A scheduled campaign sends automatically when due, through the same path.

Related

- Build lists and dynamic segments
- Record and manage marketing consent
- Publish a lead-capture form
- Marketing reference

Publish a lead-capture form

Create a public form whose submissions become deduped marketing contacts and attributed CRM leads.

A lead-capture form is a public, unauthenticated endpoint you embed on your website. Each submission upserts a marketing contact (deduped by email or phone) and creates or updates a CRM lead, carrying source and campaign attribution across the handoff.

Before you start

- You need the marketing capability and the `marketing` entitlement, plus manage rights on forms.
- Decide which fields to collect. Field types are text, email, phone, company, message and textarea — include at least an email or phone so submissions can be deduped.
- Decide the consent statement: whether consent is required, its purpose, wording, and the channels (email / sms) it covers.

Steps

1. Open the **Marketing** workspace, select the **Forms** tab, and choose **New form**.
2. Enter a **Name** and optional **Description**.
3. Add your **fields**, each with a key, label, type, and whether it is required (up to 20 fields). [screenshot: Form builder listing fields with type and required toggles]
4. Set the consent options: **consent required** (on by default), a **consent purpose**, optional **consent text**, and the **consent channels**.
5. Optionally attribute the form to a marketing **campaign** and add a **source** and **tags**.
6. Save the form. Open it to find the **Public URL** — the opaque key is the only credential and resolves to your organisation.[screenshot: Public URL card with the read-only form endpoint]
7. Embed the endpoint on your site and set the form **active**.

Result

Each genuine submission upserts one marketing contact (never a duplicate) and creates or updates one CRM lead with a **New** status, source and campaign attribution, captured fields, and any UTM values. A repeat submit updates the same contact and lead rather than opening a second. The form's **Capture summary** shows views, submissions, contacts created, leads to CRM, submissions with consent, and conversion. Consent is only recorded when the submitter ticks the required opt-in.

Related

- Build lists and dynamic segments
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