

# TANIA BAILEY

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Marketing Automation Administrator  
and Strategist

- Email examples
- Forms + Processing
- Landing Pages
- Segmentation



# REFUND ADVANCE LOAN

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- Jackson Hewitt offers a loan product in conjunction with a national financial group.
- Loans are made available from mid November onwards
- An Eloqua form is created and placed on our website to create and capture leads interested in the launch of the product.
- A small segment of VIP preselected customers are sent out preapproved emails and invited to apply for their loans early.
- Once the website launches, I handle the triggered loan outcome emails.
- An auto synch is setup where Eloqua picks up the data files from a SFTP and processes directly to the Contact Record, where segments can be created using these fields.



# Refund Advance Interest Eloqua Form

## Hidden fields for tracking purposes

DRAFT

JH2021- Refund Advance Interest

File

Actions

Save

Processing

Hidden Field

<

General Properties

Label

LandingPage

Instructions

HTML Name

LandingPage

Data Type

Text

Prepopulate field data

None

Static Value

Field Merge

Use Campaign ID

Field Validation

Must contains valid number of characters

Minimum0

Maximum35

Error Message

Invalid length for field value

Must not contain any URL

First Name

EGS Field Merge

Email Address \*

Email Address

Terms and Conditions Acceptance \*

GA-User\_ID

GA-User-ID

utm\_campaign

utm\_campaign

utm\_content

utm\_content

utm\_medium

utm\_medium

utm\_source

utm\_source

utm\_term

utm\_term

facebook click ID

facebook click ID

google\_ads-ID

google\_ads-ID

paid-search-platform-ID

paid-search-platform-ID

paid-social-platform-ID

paid-social-platform-ID

LandingPage

# Refund Advance Interest Eloqua Form - Processing Steps

Design

JH2021- Refund Advance Interest

Search

+

Update Custom Data Object - With ...

Updating CDO with Form Field Values

Update Custom Data Object - With ...

Applying Date Time Stamps

Send Submitter an Email

Refund Advance Form Responder

Add to Shared Contact List

Double-click to add description.

Redirect to Web Page

Double-click to add description.

Redirect to Web Page

Double-click to add description.

Redirect to Web Page

Double-click to add description.

General Settings

Choose a Custom Object:

2021 RA Interest Form

Select the Key Field

Email Address

Field Mapping

Source Field	Target Field
LandingPage	LandingPage
paid-social-platform-ID	paid-social-platform-ID
paid-search-platform-ID	paid-search-platform-ID
google_ads-ID	google_ads-ID
facebook click ID	facebook click ID

All Fields Update Type Always update

This Processing Step Executes...

Always

Conditionally

Never

## Refund Advance Interest Form - Conditional webpage redirects

Design

JH2021- Refund Advance Interest

Search

+

Update Custom Data Object - With ...

Updating CDO with Form Field Values

Update Custom Data Object - With ...

Applying Date Time Stamps

Send Submitter an Email

Refund Advance Form Responder

Add to Shared Contact List

Double-click to add description.

Redirect to Web Page

Double-click to add description.

Redirect to Web Page

Double-click to add description.

Redirect to Web Page

Double-click to add description.

General Settings

☐

Send to an Eloqua Landing Page:

Choose how the destination landing page is selected:

Always redirect to the same landing page.

Choose a Landing Page:

☒

Send to an External URL:

Choose how the destination URL is selected:

Always redirect to the same URL.

Enter a URL:

https://www.jacksonhewitt.com/refund-advance/?form=submitted

This Processing Step Executes...

✓

Always

⚠ 1

Conditionally

✗

Never

## Refund Advance Interest Form – Submitter Email

**Design** JH2021- Refund Advance Interest

**Update Custom Data Object - With ...**  
Updating CDO with Form Field Values

**Update Custom Data Object - With ...**  
Applying Date Time Stamps

**Send Submitter an Email**  
Refund Advance Form Responder

**Add to Shared Contact List**  
Double-click to add description.

**Redirect to Web Page**  
Double-click to add description.

**Redirect to Web Page**  
Double-click to add description.

**Redirect to Web Page**  
Double-click to add description.

### General Settings

Choose how the email to be sent is selected:

Always send the same email.

Choose an Email

JH2021 - RA - Form Autoresponse

Allow Resending:

Yes

► Advanced Settings

### This Processing Step Executes...

Always

Conditionally

Never

# Refund Advance Interest Form – Submitter Email

DRAFT JH2021 - RA - Form Autoresponse - Test

Full Mobile

From Address: info@share.jacksonhewitt.com Subject: Thank you for your submission.

Image

Field Merge

Signature

Shared Content

Dynamic Content

Cloud Content

Tools

Jackson Hewitt  
TAX SERVICE

Early Refund Advance  
Loans are almost  
here!

Thanks so much! We received your submission and appreciate your interest!

We're excited to be able to offer Refund Advance again this year. Don't miss out on any alerts!

Ensure that you keep getting messages from us by adding the email address: [info@share.jacksonhewitt.com](mailto:info@share.jacksonhewitt.com) to your contacts, address book, safe sender list or favorites.

With tax season almost upon us, you can count on Jackson Hewitt® for your tax filing needs. We're here to help.

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<tr>
  <td align="left" valign="top" elq-edit
em_text1" style="font-family: Verdana, Geneva, sans
color: rgb(80, 80, 80); border-style: none;"><br>Th
appreciate your interest! <br><br>We're excited to
Don't miss out on any alerts!
<br><br>
Ensure that you keep getting messages from us by ad
href="mailto:info@share.jacksonhewitt.com" data-tar
title="info@share.jacksonhewitt.com."><font color="
</b></font></a> to your contacts, address book, saf
<br><br>
With tax season almost upon us, you can count on Ja
10px;"></sup> for your tax filing needs. We're he
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    <table width="380" style="width:380px
cellpadding="0">
      <tbody>
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cellpadding="0" bgcolor="#360060">
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```



# JACKSON HEWITT'S LOAN PRODUCT IS LIVE.



Log in | Sign upSearch


Tax FilingTax HelpTax DebtContact UsRefund AdvanceFind an Office

Jackson Hewitt ▶ Refund Advance

## You could prequalify for a Refund Advance tax loan

Need a loan against your tax refund this year? All you need is a paystub or proof of income to see if you qualify. Start now and see if you prequalify ahead of your visit.

See if you prequalify






# LOAN APPLICATION

Jackson Hewitt  
TAX SERVICE

MetaBank

0%



Let's see if you prequalify. Let's start with how much was your federal tax refund last year? ⓘ

Refund amount

\$

Next

Did you get a Refund Advance with us last year?

Get this year's here

Early Refund Advance Loans.

Early Refund Advance Loans are offered in the amounts of \$200 – \$700 at no cost to you. Early Refund Advance Loans are offered prior to your filing your tax return and you are not required to provide all information necessary to file your tax return to apply, but you must provide a most recent pay stub or equivalent form of evidence of income upon which Jackson Hewitt can make a preliminary estimate of your tax refund. The loan amount is deducted from tax refunds reducing the amount paid to the taxpayer. Must

Triggered outcome email based on a customer applying for the Refund Advance loan on the Jackson Hewitt website.

Image

Field Merge

Signature


Shared Content

Dynamic Content


Cloud Content

Tools

MetaBank

 Jackson Hewitt

TAX SERVICE



First\_Name1

Based on the information you provided, we could not approve you for an **Early Refund Advance** with your pay stub.\*

**However, you have been prequalified for a Refund Advance**

No Fee

\$Web\_NF1

0% APR loan

The prequalification amount is based on the information you provided. Life changes occurring during this tax year can impact your tax refund amount. Actual loan amount may vary based on Metabank®, N.A.'s underwriting criteria and changes to your tax situation, including your refund amount.

**Come in to Jackson Hewitt® with your W-2 starting January 2 to get your Refund**

```
src="https://images.share.jacksonhewitt.com/EloquaImages/clients/JacksonHewittTech
blaf-1b5bc3964c02%7D_dark-blue-disclaimer-top.jpg"><!--[if gte mso 9]>
251 <v:rect xmlns:v="urn:schemas-microsoft-com:vml" fill="true" stroke="false" style
252 <v:fill type="tile"
src="https://images.share.jacksonhewitt.com/EloquaImages/clients/JacksonHewittTech
blaf-1b5bc3964c02%7D_dark-blue-disclaimer-top.jpg" color="#ffffff" />
253 <v:textbox inset="0,0,0,0">
254 <![endif]--> </td> </tr>
255 </tbody></table>
256 <!-- == //Body Section == -->
257 <!-- == Footer Section == -->
258 <table bgcolor="#ffffff" border="0" cellpadding="0" cellspacing="0" class="em_full
259 <tbody>
260 <tr>
261 <td align="center" valign="top">
262 <table align="center" border="0" cellpadding="0" cellspacing="0" class
layout: fixed; background-color: #004692;" width="600">
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540px;" width="100%">
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279 <tr>
280 <td class="em_hide" style="line-height:1px;min-width:600px
border="0" height="1" src="https://www.jacksonhewitt.com/globalassets/email/refund
min-height:1px; display:block; width:600px; min-width:600px;" width="600" /></td>
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288 <!-- == //Footer Section == -->
289 2</sup> X<sub>2</sub>

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Get Directions



# Segment for Refund Advance Email

- Criteria: customer has been approved for loan AND (Loan amount based on customer paystub is > \$100 + No Fee loan amount is > \$100)
- Unsubscribes not excluded due to the communication being customer action triggered
- People who were denied the loan excluded and sent a separate denial email
- Since people can apply for the loan multiple times, our BI team dedupes the data based on various factors (email address, customer ID, social security number etc) and we only see one outcome per application in the data that is sent to Eloqua.

ACTIVE

JH2021 - RA - Website Outcomes - Prequal NF + PS - Before Jan 2

View Contacts...

File

Actions

4,330 contacts

4 days ago

+

Prequal NF + PS Approved

No description provided

25,670 included

JH2021 - RA - Exclude Prequa...

No description provided

127,188 excluded

JH2021 - RA - Declines

No description provided

709 excluded

Compare Contact Fields

Contacts who have a "2021\_RA\_Prequal\_Decision" field having a value that is equal to "approved"

AND

Compare Contact Fields

Contacts who have a "2021\_RA\_Web Paystub Amount-Numeric" field having a value that is greater than 100

AND

Compare Contact Fields

Contacts who have a "2021\_RA\_Web No Fee Amount-Numeric" field having a value that is greater than 100

All

Search for Filter Criteria

Compare Contact Fields

Compare Visitor Profile Fields

Compare Account Fields

Has Linked Account

Has Linked Contact in Custom Object

Has Linked Account in Custom Object

Has Linked Record in Event

Compare Lead Score

Sent Any Email

Sent Specific Emails

Sent Emails from Campaigns



## SFTP where files are dropped by our BI team

sftp://prd\_eloqua@sftp.jhnet.com - FileZilla

File Edit View Transfer Server Bookmarks Help

Host: sftp://sftp.jhnet.com Username: prd\_eloqua Password: ..... Port: Quickconnect

Status: Retrieving directory listing of "/in" ...  
Status: Listing directory /in  
Status: Directory listing of "/in" successful  
Error: FATAL ERROR: Remote side sent disconnect message  
Error: type 11 (by application):  
Error: "Manually close SSH session."

Local site: C:\Users\bailey\Documents\ Remote site: /in

| Filename                | Filesize | Filetype    | Last modified         |
|-------------------------|----------|-------------|-----------------------|
| ..                      |          |             |                       |
| Adobe                   |          | File folder | 9/15/2020 10:27:14... |
| Archive                 |          | File folder | 10/15/2020 11:07:2... |
| Custom Office Templates |          | File folder | 10/24/2019 2:18:54... |
| Downloads               |          | File folder | 12/20/2019 9:55:15... |
| Email Templates         |          | File folder | 11/12/2019 11:01:2... |
| Juxto                   |          | File folder | 11/23/2020 6:34:49... |
| My Music                |          | File folder | 11/9/2020 8:43:11 ... |
| My Pictures             |          | File folder | 11/18/2020 12:42:4... |
| My Received Files       |          | File folder | 7/10/2020 4:52:19 ... |
| My Shapes               |          | File folder | 12/9/2019 3:34:39 ... |
| My Videos               |          | File folder | 11/9/2020 8:43:11 ... |
| OneNote Notebooks       |          | File folder | 10/23/2019 4:25:46... |
| Outlook Files           |          | File folder | 10/28/2019 11:08:4... |
| Personal                |          | File folder | 11/23/2020 6:36:04... |

| Filename                         | Filesize    | Filetype                     |
|----------------------------------|-------------|------------------------------|
| ..                               |             |                              |
| JCK_PROSPECT_EVENT_TO_ELOQUA.txt | 125,571     | Text Document                |
| W2Data.csv                       | 61          | Microsoft Excel Comma Sep... |
| EarlyAccessAccounts.csv          | 355         | Microsoft Excel Comma Sep... |
| Appointments.csv                 | 322,302     | Microsoft Excel Comma Sep... |
| Invoice.csv                      | 875,549,699 | Microsoft Excel Comma Sep... |
| ContactAddUpdate.csv             | 420,207,446 | Microsoft Excel Comma Sep... |
| ProspectsFlat.csv                | 8,611,798   | Microsoft Excel Comma Sep... |
| SegmentBackfill.csv              | 1,961       | Microsoft Excel Comma Sep... |
| Email-Verification.csv           | 6,513,099   | Microsoft Excel Comma Sep... |
| PricePersonal-EventEloqua-2.csv  | 20,022,552  | Microsoft Excel Comma Sep... |

# Data Import for Refund Advance loan product that gets mapped to the Eloqua contact record to create segments

ORACLE

Eloqua

Data Export & Import Setup

Data ImportData ExportAudit Settings

2019 Filers for Migration 1  
2019 Filers for Migration 2  
2019 Gross Fees  
2019 Office Number into Most Recent ...  
2019 Pricing 1  
2019 Pricing 2  
2020 Filers Part 1  
2020 Filers Part 2  
2021 RA Prequal\_BV  
2021\_RA\_Prescreened-Priors-VIP-La...  
Appointments  
ApptsOfficeUpdate\_March2020  
AtRisk Segment  
Consent Backfill 2020 Contact Synch  
Consents Stream 1  
Consents Stream 2  
Consents Stream 3  
Consents Stream 4  
Consents Stream 5  
Consents Update 7/6  
Consents Update 7/9  
Contact Activity Synch  
Contact Updates 2020  
Email Verification

OverviewImport SettingsField MappingHistory

General

Import Name: 2021 RA Prequal\_BV

Priority Source: Remote File over SFTP

Import Purpose: Add Contacts to Database

SFTP Source

Server: Jackson Hewitt Eloqua Prod SFTP

Path: /in/JCK\_PROSPECT\_EVENT\_TO\_ELOQUA.txt

Schedule

Run this import: ☐ On demand ☒ On these days: Sun Mon Tue Wed Thu Fri Sat

Interval: Run Every Hour

Between 12:00 AM and 12:00 AM

(UTC-05:00) Eastern Time (US & Canada)

Notification

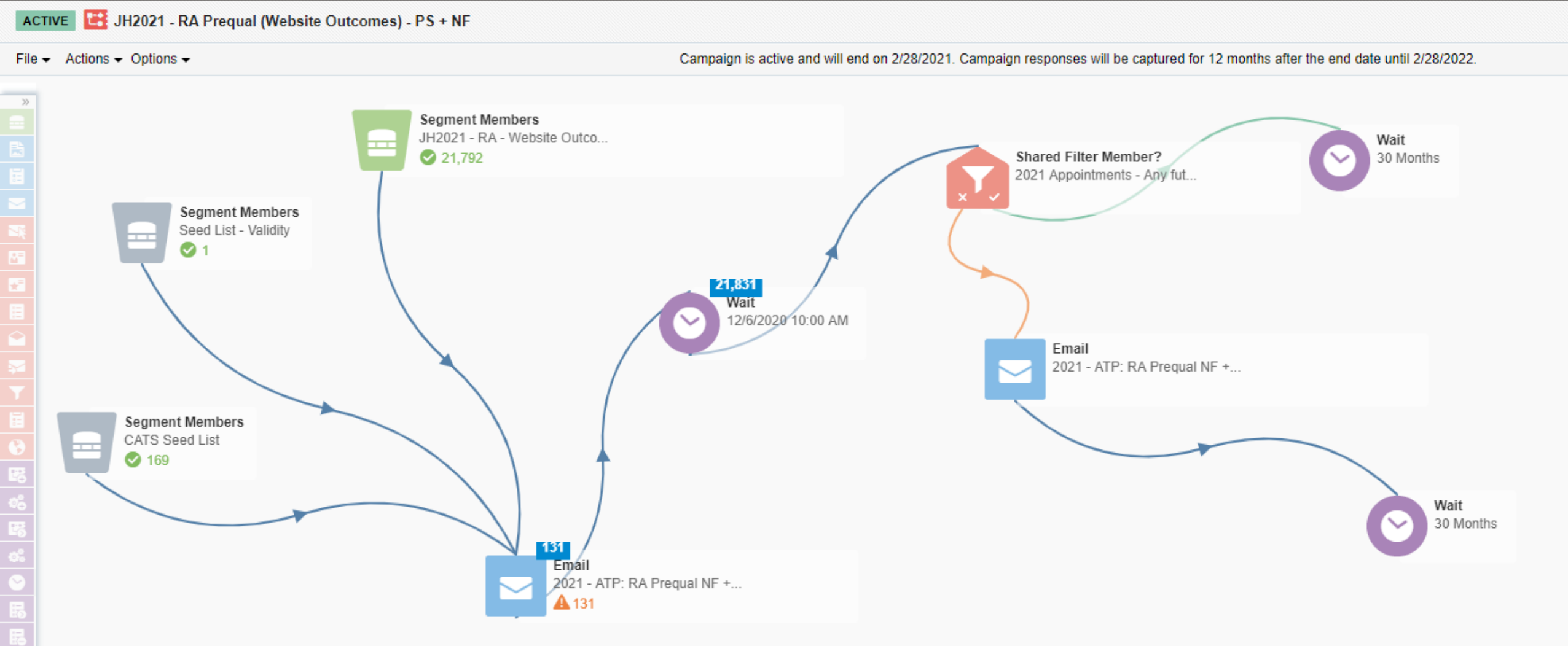
☒ Notify me about this import

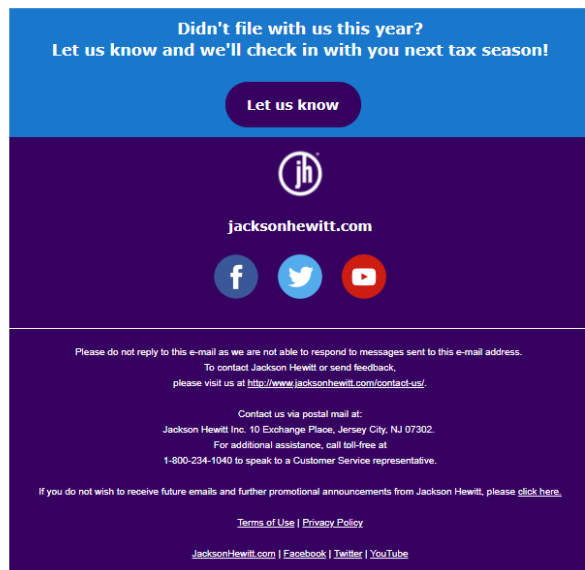
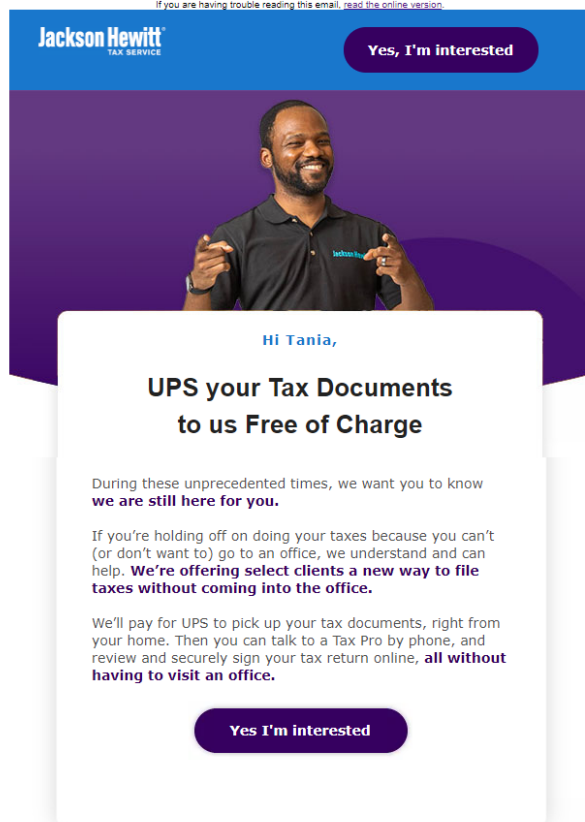
☒ Email Errors

Save

# Campaign Canvas for one Refund Advance loan product

This has been simplified since these are regarded as service emails





## UPS CAMPAIGN – MID JULY 2020

- A trial was conducted to see how customers would respond to an offer for us to pay for their documents to be sent to their local office for a tax pro to complete their tax return, show them the outcome and file it with the IRS.
- This email was sent to a select number of customers.
- The “Yes, I’m interested” button went to an Eloqua landing page with an Eloqua form that I created.
- We also took this opportunity to find out if during this extraordinary time period, customers had filed their taxes elsewhere, which would help us with email cadence, frequency and exclusions.


# Landing Page for customers interested in using UPS service for tax filing

URL: <https://learn.jacksonhewitt.com/UPS>

learn.jacksonhewitt.com/UPS

ogle ☐ Recipes ☐ Work ☐ Email Resources ☐ Personal

**Jackson Hewitt**  
TAX SERVICE



## UPS your Tax Documents to us Free of Charge.

We're offering select clients a new way to file taxes without coming into the office.

If you're interested, please fill in the form below.

First Name\*

Tania

Last Name\*

Bailey

Best Number for a Tax pro to reach you:\*

9173630496

Best time for us to call you: \*

☐ Morning (between 10 AM - 12 PM)

☐ Afternoon (1 PM - 4PM)




☐ Evening (5 PM - 8 PM)

Submit my responses

# Eloqua Form for UPS

Note the hidden fields

**DRAFT** JH - 2020 - UPS Test



**Contact Fields**

Search Contact Fields

☐ 2019 Fed Filer

☐ 2019 Fed Refund


☐ 2019 Filed with Spouse


☐ 2019 Gross Tax Fees

☐ 2019 Net Tax Fees

☐ 2019 Preack Date

**Form Elements**

 Progressive Profile

 Form Text

☐ Single Line Text

☐ Paragraph Text

☐ Single Picklist

☐ Multiple Picklist

☒ Radio Buttons

Hidden Field - Email

Email Address

Hidden Field -GCID

Global ID Primary

Hidden Field - PCenter

2019 PCenter

Hidden Field - Office Number

StoreMostRecent2

First Name \*

EGS Field Merge

Last Name \*

Last Name

Best Number for a Tax pro to reach you: \*

Best time for us to call you: \*

☐ Morning (between 10 AM - 12 PM)

☐ Afternoon (1 PM - 4PM)

☐ Evening (5 PM - 8 PM)

Submit my responses



## Eloqua Processing Steps for form for UPS

Note the auto responder email

Design

JH - 2020 - UPS Test

Search

Update Contacts - With Form Data

Double-click to add description.

Send Submitter an Email

Double-click to add description.

Add to Shared Contact List

Double-click to add description.

Redirect to Web Page

Double-click to add description.

Some field mapping validations are missing or incorrect. Review and update the field properties.

General Settings

Choose how the email to be sent is selected:  

Always send the same email.

Choose an Email  

UPS Auto Response

Allow Resending:  

Yes

Advanced Settings

This Processing Step Executes...

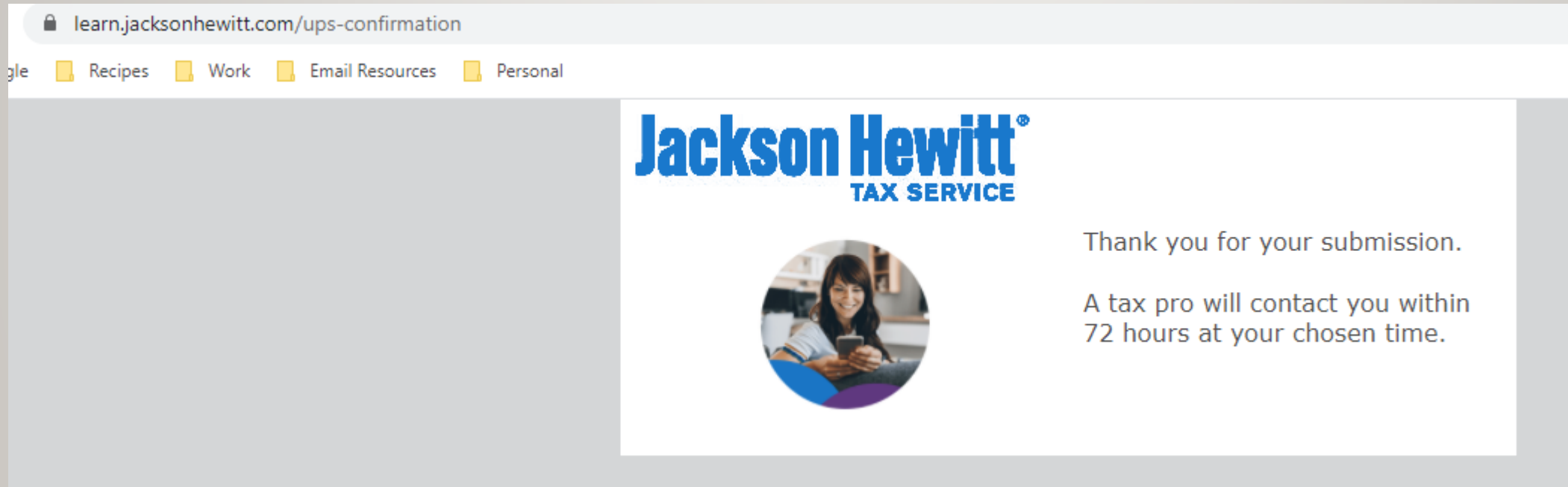
Always

Conditionally

Never

## Confirmation Landing Page for customers interested in using **UPS** service for tax filing

URL: <https://learn.jacksonhewitt.com/ups-confirmation>



From Address: info@share.jacksonhe... Subject: Thank you for your interest in sending your tax documents to us free of charge via UPS!



Image



Field Merge



Signature



Shared Content



Dynamic Content



Cloud Content



Tools



Hi **First\_Name1**,

## UPS your Tax Documents To Us and We Pay

Thank you for signing up to learn more about how **Jackson Hewitt® can help prepare your taxes by having UPS pick up your tax documents, right from your home.**

A Tax Pro will be reaching out to you within the next 72 hours to discuss this new way to file taxes without coming to our office.



Please note that due to high volume, if you have not heard from a Tax Pro, please reach out to us at the following number: **1-800-234-1040** or visit **[Jackson Hewitt.com](https://www.jacksonhewitt.com)**.

P.S. If we received your request close to the tax deadline we will make every effort to file an extension before completing your tax return.

Auto responder email to customers filling out the form interested in the UPS pick up service

learn.jacksonhewitt.com/remove-migration2

gle Recipes Work Email Resources Personal



## Thanks for letting us know you have already filed.

We're in this together. By telling us you filed somewhere else, we will remove you from communications for the remainder of this tax season, but you will still be eligible to receive emails about special offers next year.

Let us know where your filed this year

- ☒ TurboTax
- ☒ Liberty Tax
- ☒ H&R Block
- ☐ Local CPA

I filed another another way

Submit my responses

Landing page with Eloqua form for customers to let us know that they have completed filing their taxes elsewhere

URL

<https://learn.jacksonhewitt.com/remove-migration2>

# Eloqua Form for Filed Elsewhere

DRAFT

JH - Filed Elsewhere Survey

Contact Fields

Search Contact Fields

2019 Fed Filer

2019 Fed Refund

2019 Filed with Spouse

2019 Gross Tax Fees

2019 Net Tax Fees

2019 Preack Date

Form Elements

Progressive Profile

Form Text

Hidden Field

Email Address

Let us know where your filed this year

TurboTax

Liberty Tax

H&R Block

Local CPA

I filed another another way

Submit my responses



THANK YOU FOR TAKING THE TIME TO  
REVIEW MY PORTFOLIO OF EXAMPLES OF  
ELOQUA ASSETS.

---

IF YOU HAVE ANY QUESTIONS OR WOULD  
LIKE ME TO WALK YOU THROUGH THESE  
EXAMPLES, PLEASE CONTACT ME USING  
THE DETAILS BELOW:

- [TANIABEE@GMAIL.COM](mailto:TANIABEE@GMAIL.COM)
- PHONE: 917-363-0496

