XMPie PE v8 Training Series

Transcript for: Scheduling and automation

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Software version: v8

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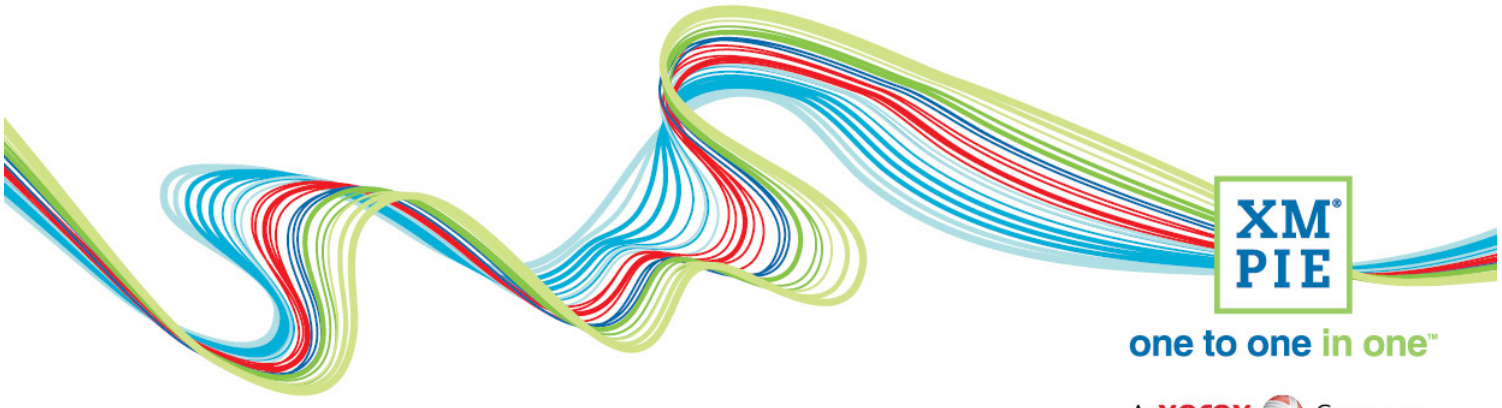

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For information, contact XMPie Inc.
485 Lexington Avenue
10th. Floor
New York, NY 10017

More information can be found at www.xmpie.com

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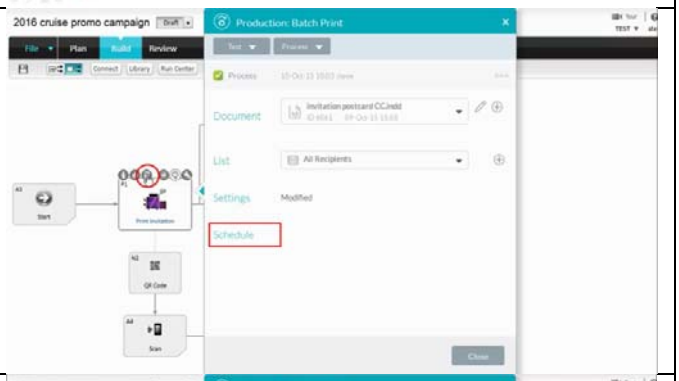
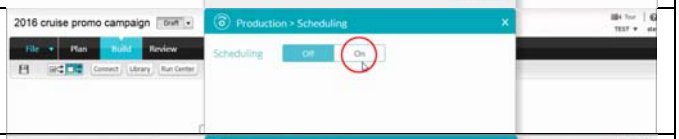
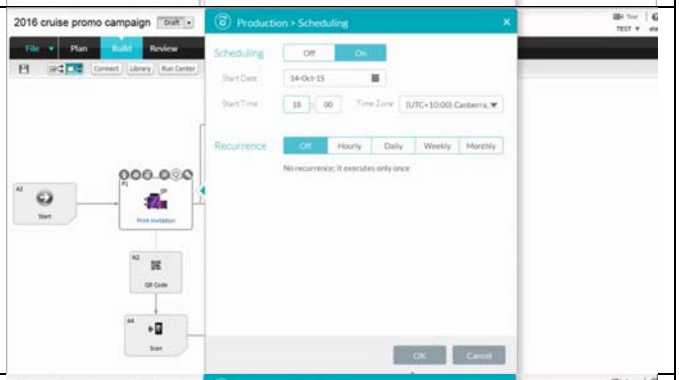
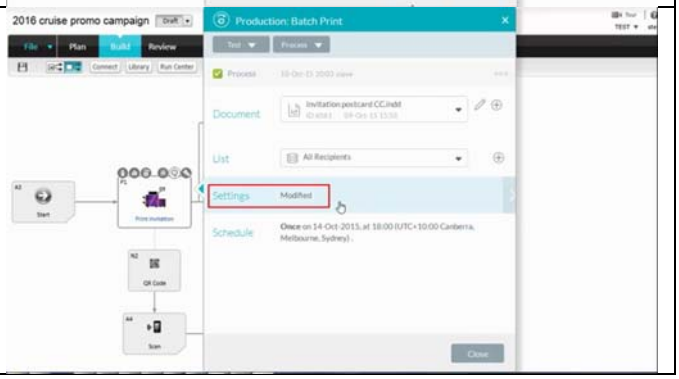
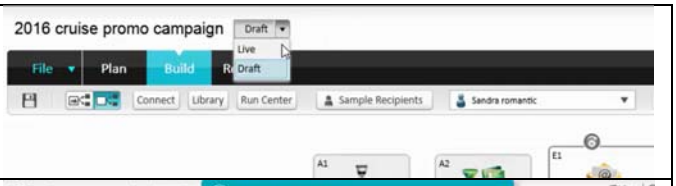
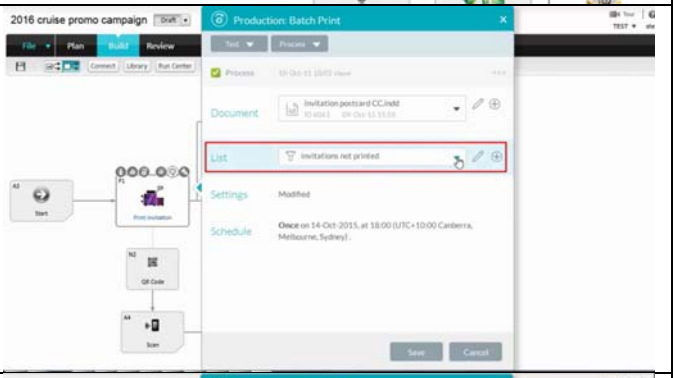
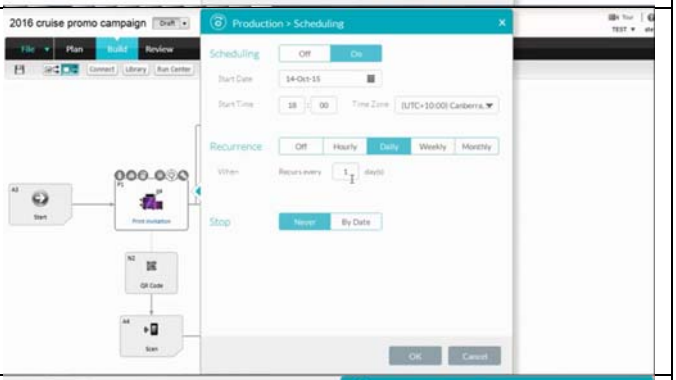
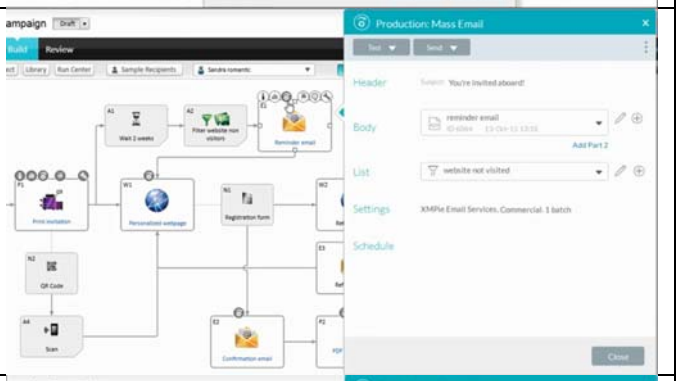
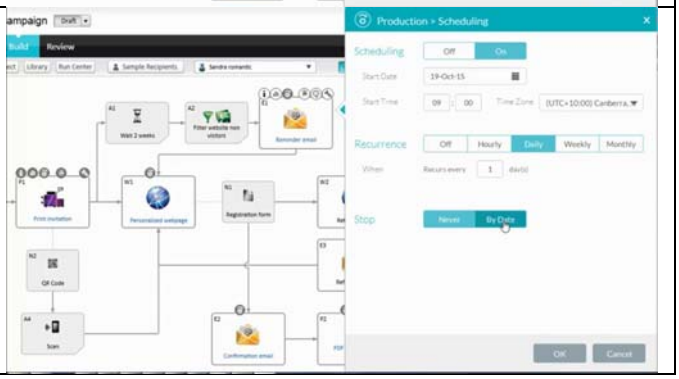
Voice over script	Thumbnail
Hi! Welcome to XMPie PersonalEffect version 8. In this tutorial we look at scheduling and automation in Circle.	
Once you have set the document and production settings onto a Print or Email Touchpoint, you can schedule the production to occur at a later date and time, or to run at a repeating interval. If you simply want to process the Print invitation overnight, or on a weekend when the print room is not busy, on the production settings click Schedule,	
and turn the feature on.	
Set the date you want to run the production, and enter the time in 24-hour format. 18:00 hours will be 6pm. Recurrence allows you to repeat the job. We'll look at that in a moment.	
Remember, for print jobs, you can select the output destination in the Settings area, so that the scheduled job will be created and sent directly to your printer.	

To enable scheduled tasks to run, you need to change your project from Draft, to Live mode. But, before I do that, let's look at another example.	
If this is an ongoing campaign, and recipients are added to the database over time, we might also want to repeat this print production. I've created a recipient filter list to select recipients for whom the invitation has not yet been printed. There is a separate video which shows how to create recipient filter lists.	
We could now run this scheduled task every day, and any new people added to the database would get their invitation created and sent to the printer.	
We could also schedule this email to go out automatically if the recipient has not come to the website after 2 weeks from when the invitation was printed. To select the right recipients, I have again setup a recipient filter list.	
I'll start this one next week, set it to send the email at 9am, and repeat the job each day. The filter will select recipients only when the right conditions occur, and the email will only be sent to the recipients returned by the filter. If needed you can also set a stop date to turn off the scheduled task.	

In this scenario, we could continue to add recipients to the campaign database, invitation postcards would be printed at 6pm after they are added, and a reminder email will be sent out at 9am after the 14 days if the customer hasn't already visited their personalized website. This is truly hands off, marketing automation in action!	