

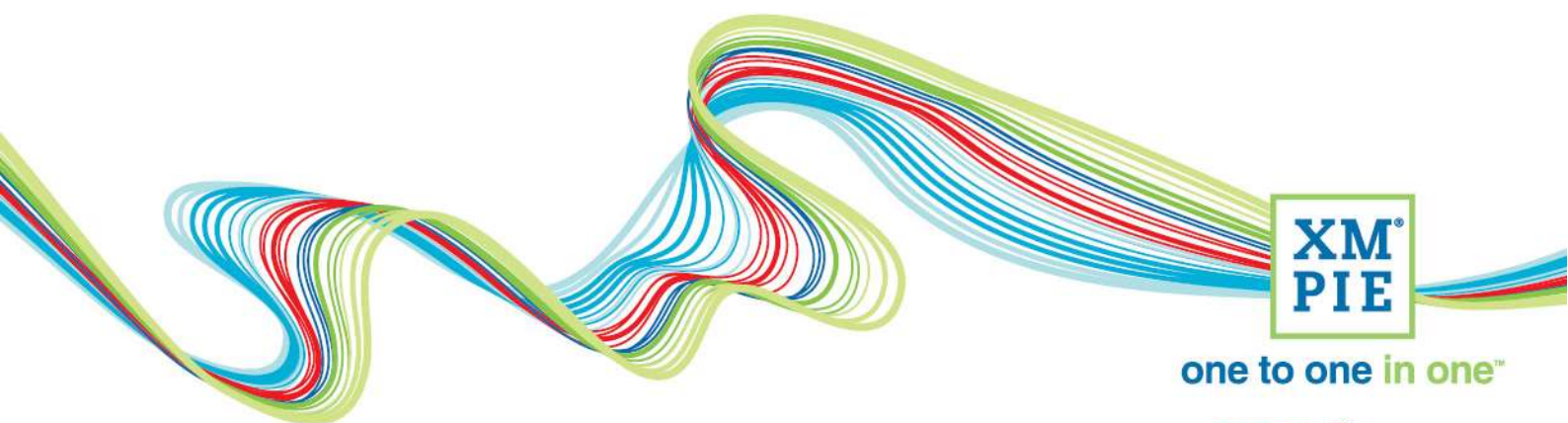
XMPie Cross Media Training Series

Transcript for: Creating a new Circle project

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one to one in one™

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For information, contact XMPie Inc.

485 Lexington Avenue

25th. Floor

New York, NY 10017

More information can be found at www.xmpie.com

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Voice over script

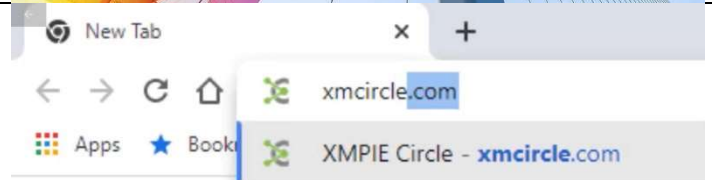
Hi! Welcome to XMPie PersonalEffect Cross Media.

In this tutorial we start a new cross media campaign by creating a new project in Circle and planning the customer touchpoints and the flow of the campaign.

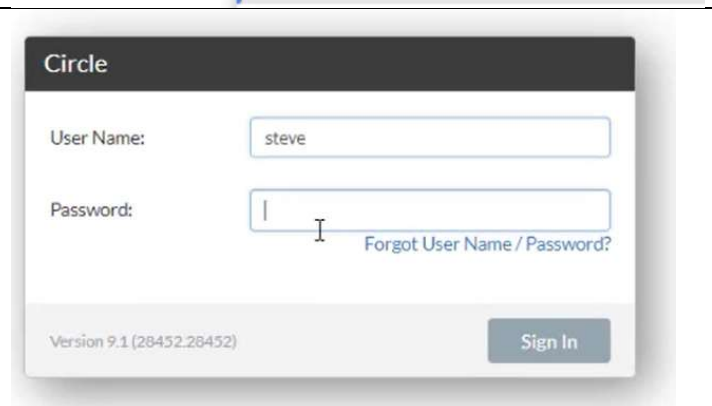
Thumbnail



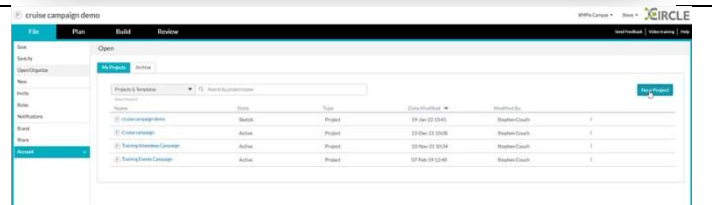
To start, open a web browser and navigate to xmcircle.com



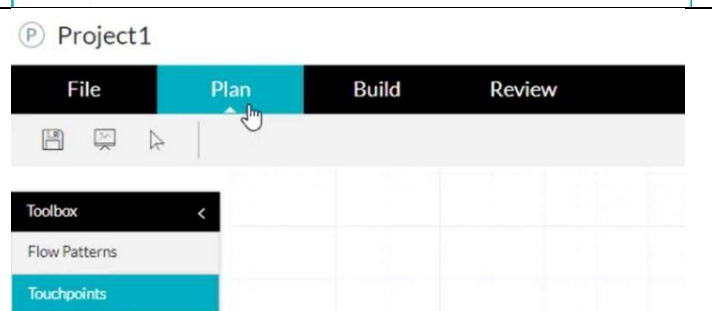
Enter your Circle credentials to login.



The first time you login, you will be presented with a new empty project. If you have logged in previously, Circle will open the last project that you worked on. To create a new project, click File and then New Project.

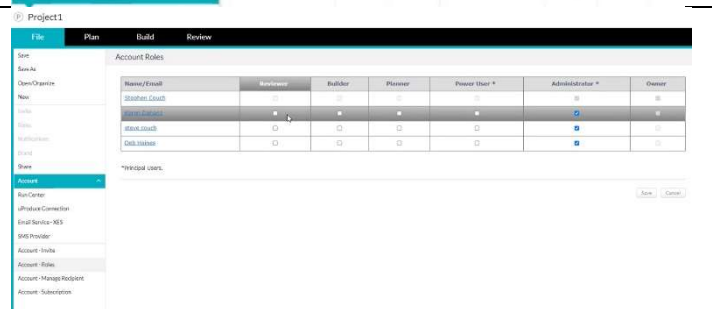


There are four main tasks in Circle that are represented by these tabs: Plan, Build, Review, and there is also Analyze tab which will appear later when the project is setup.



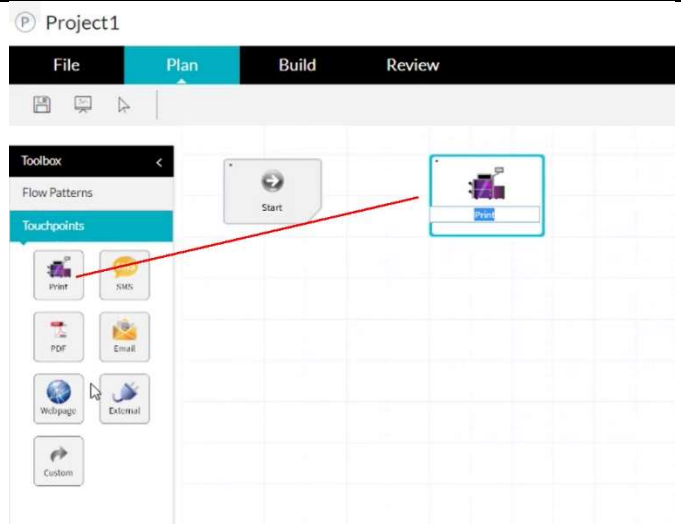
In this video, we focus on planning the campaign's flow which is done here in the plan area.

Access to these different tasks is controlled by Circle Account Roles, so if you don't see the plan tab, you will need to talk with your company's Circle administrator who can check and change your Circle user account role.



In addition to Reviewers, Builders and Planners there are also Power User and Administrator permissions. Information on these permissions can be seen here.

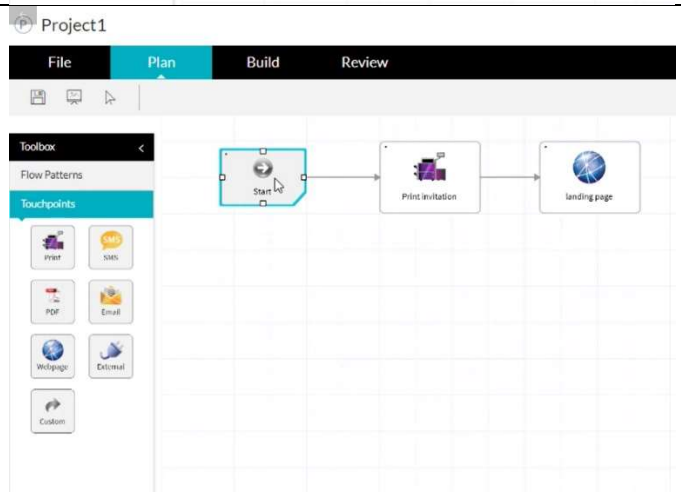
To start our project plan, we need to click and drag out the campaign touchpoints from the toolbox to create a visual representation of the campaign's flow or process.



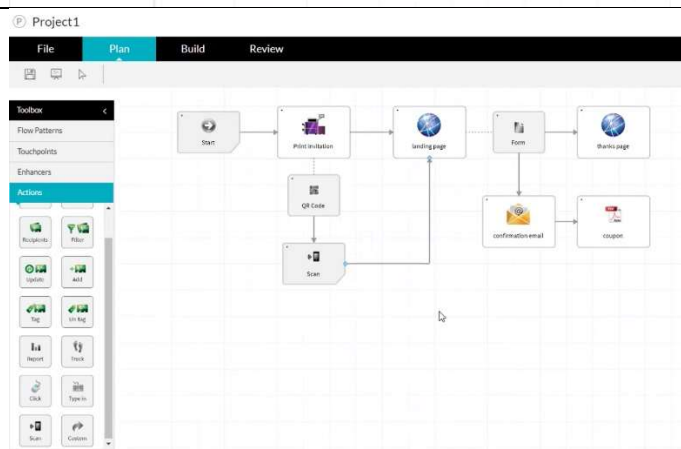
To help describe or explain the touchpoints, you can change the text that appears on the touchpoint. You can also join the touchpoints to help indicate the process flow.

I'll add some more touchpoints and speed up the video a little.

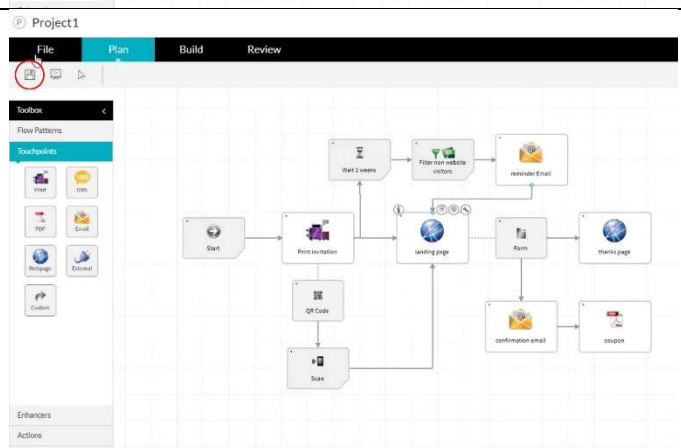
The campaign diagram can be as simple or as complex as you need to help describe the campaign to your customer.



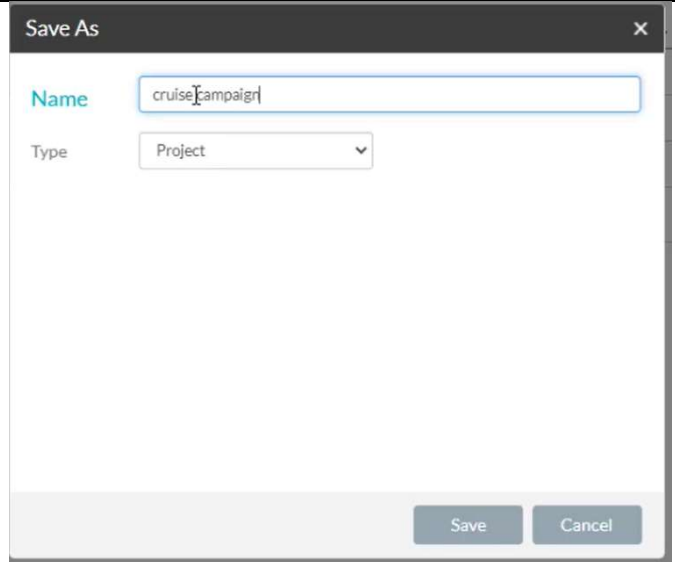
We can also use enhancers or actions to help communicate or describe what is happening. But, the main items are the touchpoints because these represent the actual web pages and print or email documents that we will create later in the tutorial.



When you are happy with the project design, you can save it.



There is no need for the project plan to be 100% complete when you save. You can always come back, open your project and make changes later.



If you haven't used Circle before and need more help, there are a series of tour videos here, and comprehensive online help is available from this link.

