

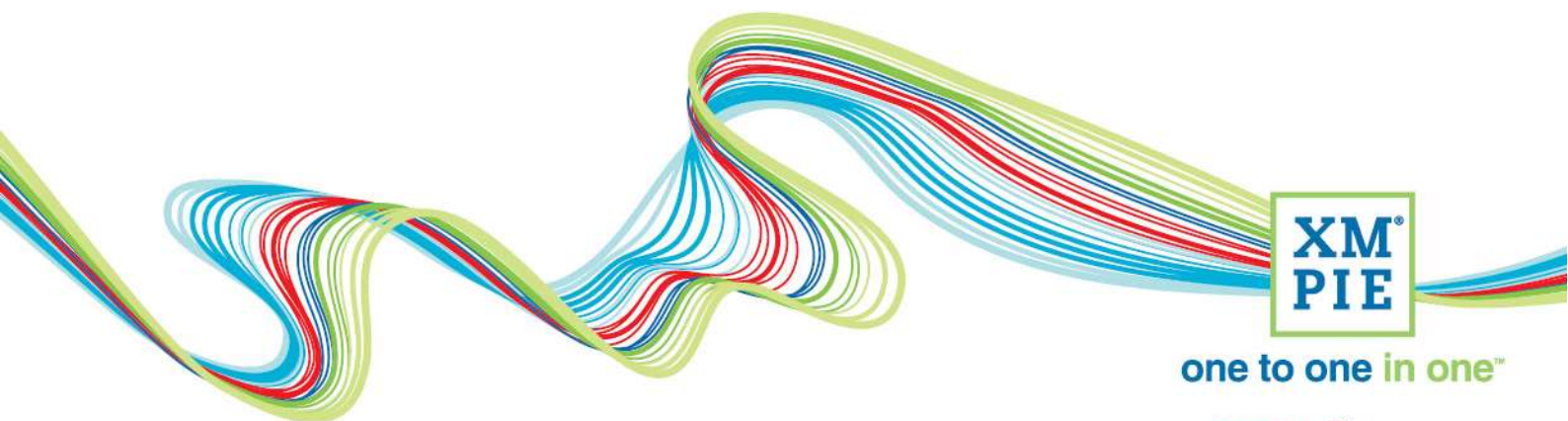
# XMPie Cross Media Training Series

Transcript for: Collaborating with customers and colleagues

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Software version: v11

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## Voice over script

Hi! Welcome to XMPie PersonalEffect Cross Media.

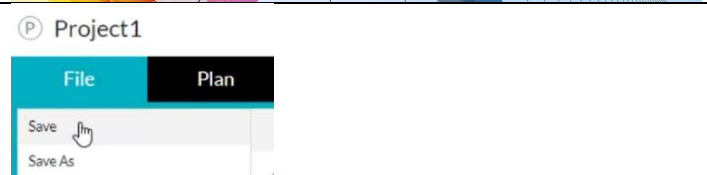
In this tutorial we look at some of the ways you can use Circle to collaborate with customers and colleagues during the campaign planning and delivery process.

## Thumbnail



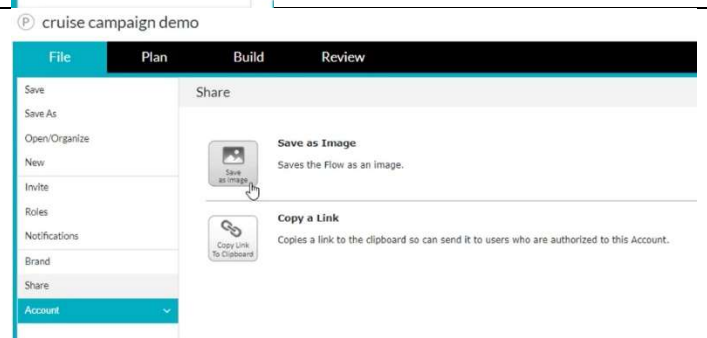
When you are happy with the campaign plan, save it.

Once saved, you can start to share it with others.



On the File tab, when you select Share, you can choose to save the campaign flow diagram to a PNG file that you can send in an email, or use in a PowerPoint presentation.

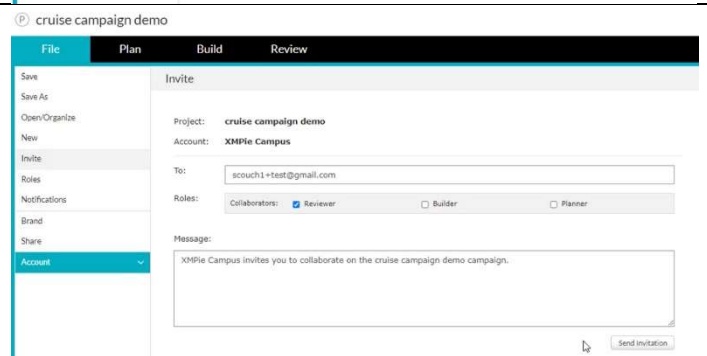
You can copy the link to this Circle Project and add it to an email, Word document or intranet site. In this case, the person who clicks on the link must have a Circle user account and permission to access the project.



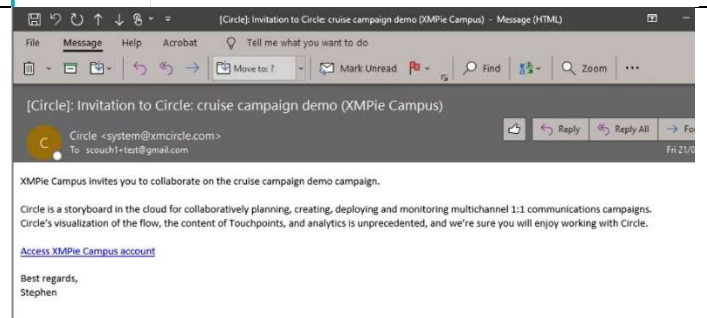
Alternatively, you can invite customers or colleagues into your Circle project.

When you invite someone, you can control what Roles they will have, and therefore, whether they will have permission to modify your project.

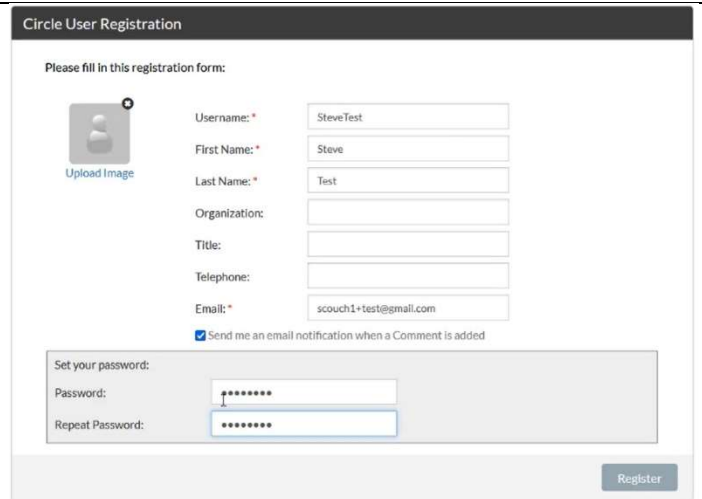
You can also modify the message of the email that will be sent if needed.



When the customer receives the email, they can click the link to access the project.



If this is the first time their email address has been sent an invitation to Circle, they will be prompted to enter some registration information.



Circle User Registration

Please fill in this registration form:

Username: \*

First Name: \*

Last Name: \*

Organization:

Title:

Telephone:

Email: \*

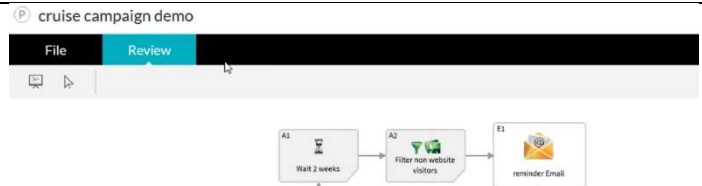
☒ Send me an email notification when a Comment is added

Set your password:

Password:

Repeat Password:

Now that the user has logged in, notice that they can only use the Review tab, Planning and Building was not permitted for this user.



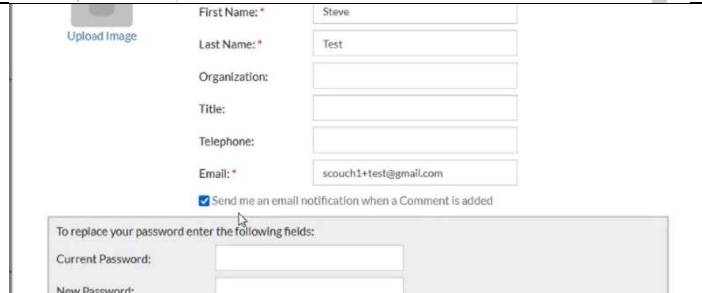
The comments feature enables all users in the project to provide feedback on any of the campaign Touchpoints.



Comments

what will the design look like?

When a comment is added, everyone in the project will receive an email update. You can turn on or off email updates using the My Profile link.



Upload Image

First Name: \*

Last Name: \*

Organization:

Title:

Telephone:

Email: \*

☒ Send me an email notification when a Comment is added

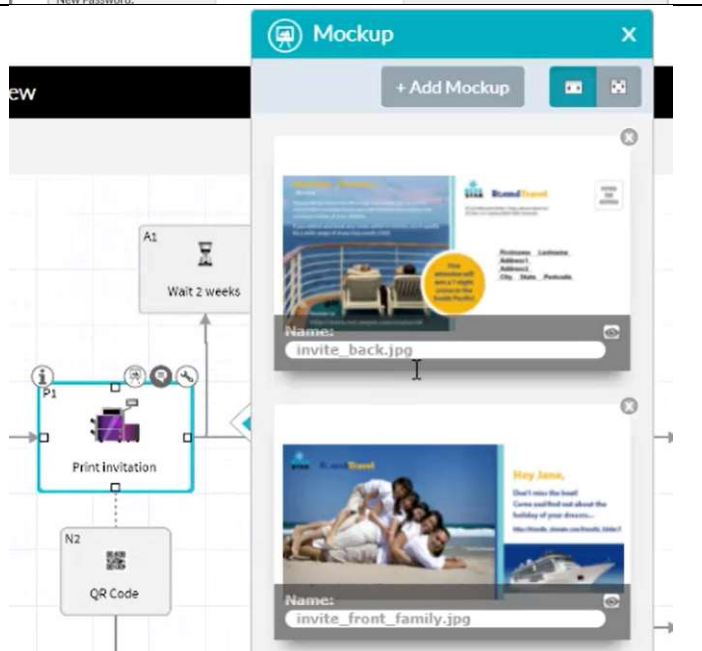
To replace your password enter the following fields:

Current Password:

New Password:

Of course, as you receive comments, you can continue to adjust and modify the campaign plan.

Using mockups is another way to collaborate. Mockups allow you to view a preview or design mockup of what you are planning. Some screen shots or quick design sketch can help get feedback even before you start working on the actual design files.



Mockup

+ Add Mockup

invite\_back.jpg

invite\_front\_family.jpg

Having everything in one location makes team collaboration much easier than sifting through old emails and meeting notes.

