

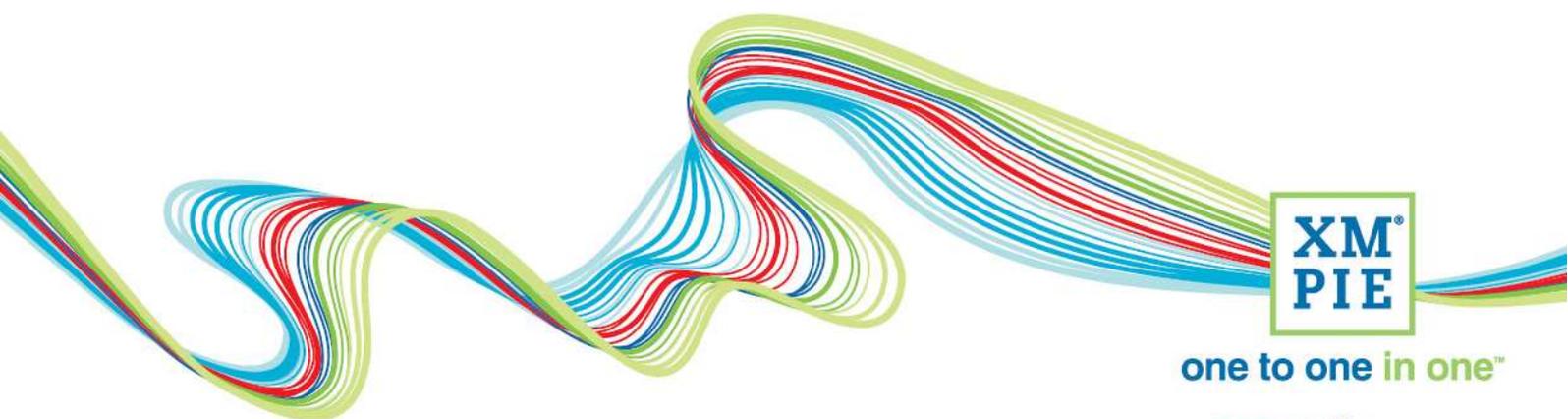
XMPie Campaigns on Demand

Transcript for: uStore setup

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one to one in one™

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JP Patent 4406364B and pending patents.

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Voice over script

Hi. Welcome to XMPie. In this module, we setup a store that can access your Circle Account, and then add our first cross media product by setting up the sample campaign that we created in Circle in the previous module.

To start, login to your uStore admin site. First we will check some settings that are required only once.

In the Presets area, click PersonalEffect Connections.

This option was previously called uProduce Connection. Now, it offers setup of both uProduce and Circle credentials.

First, click uProduce.

You need to setup a uProduce user that uStore can use to access the documents on the XMPie production server.

Remember that your Circle account will also be set up with a uProduce user. It is best if you use the same uProduce user in both systems.

If you use a different user, make sure that the one you use in uStore can access the same accounts in uProduce as the user that is set in your Circle account.

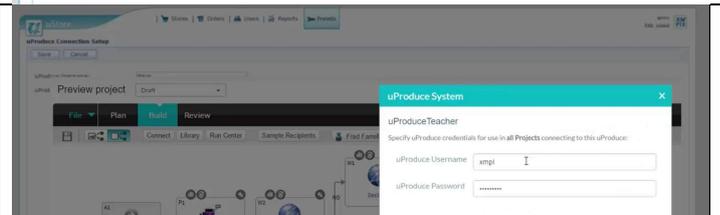
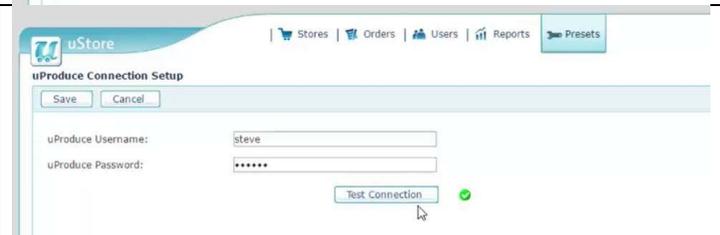
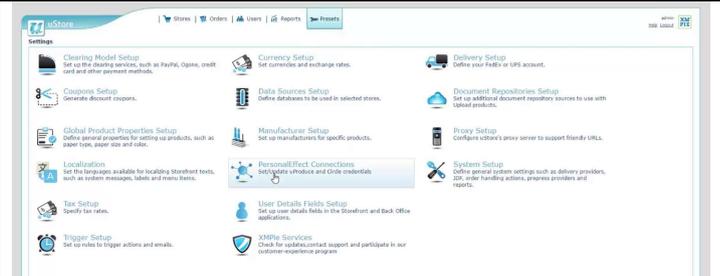
Thumbnail



Campaigns On Demand

- uStore settings (once off)
- Creating a store
- Adding an XM product

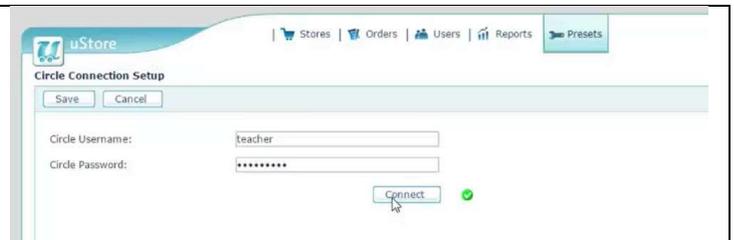
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Next, click back and click Circle. If your Circle user account is not listed, click to add it.

Enter the Circle username and password, and Connect.

That's it for settings. Click Stores, and click to create a New store.

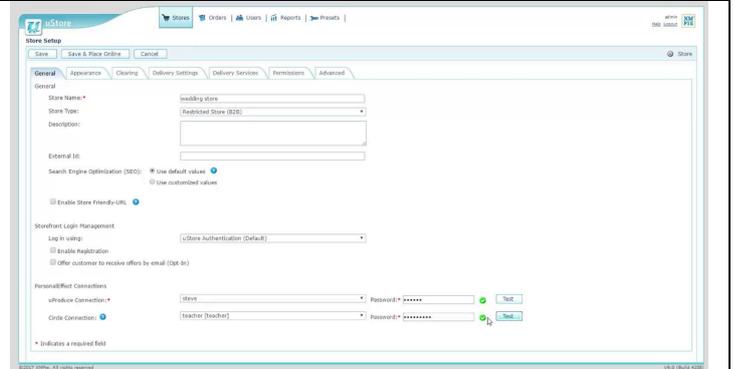


Enter a store name.

Select your uProduce user, and then enter the password and test to confirm that you are permitted to use the account.

And, repeat for the Circle user.

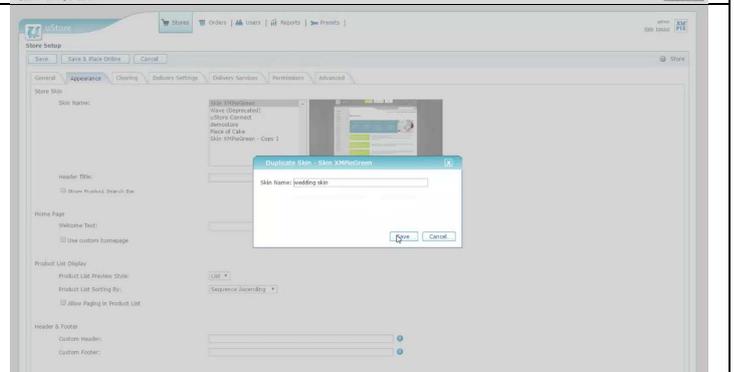
Of course, you can make other settings, but I will highlight the ones necessary for the sample store.



Click the Appearance tab, and click to duplicate the Skin XMPie Green.

I'm copying the skin so we can set the property icons used in the sample store without changing the default skin folder.

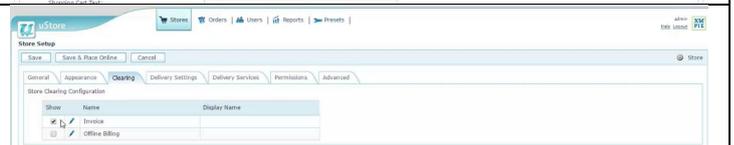
We will copy the images later.



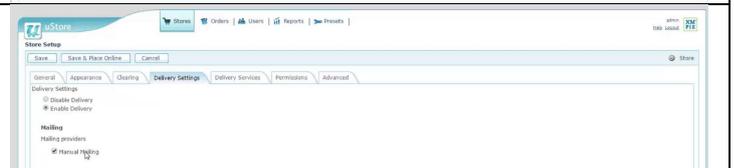
Scroll down and check the box for the setup culture to be English.



Click the Clearing tab, and enable the Invoice clearing method.

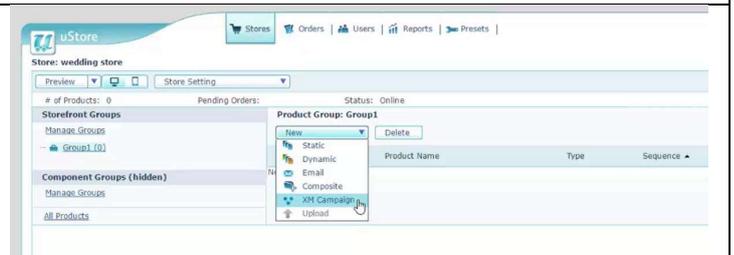


Click the Delivery settings tab. For this example, there is a print piece to be mailed out, so we need the Manual Mailing option to remain checked, but you can make other changes as required.



You can now save and put the store online. Our next task is to add the cross media product.

The New product drop-down includes a new option for XM Campaign.

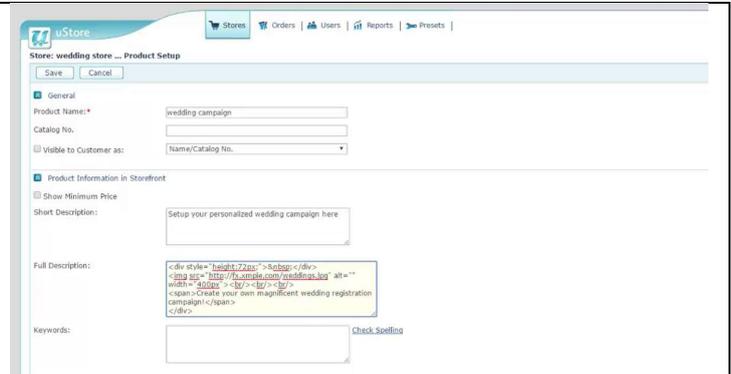


Give the product a name.

Add a short description.

For the full description, I've provided a small piece of html in the resources zip file. Just copy and paste it in.

The html displays a graphic and text message to the customer on the product details step.



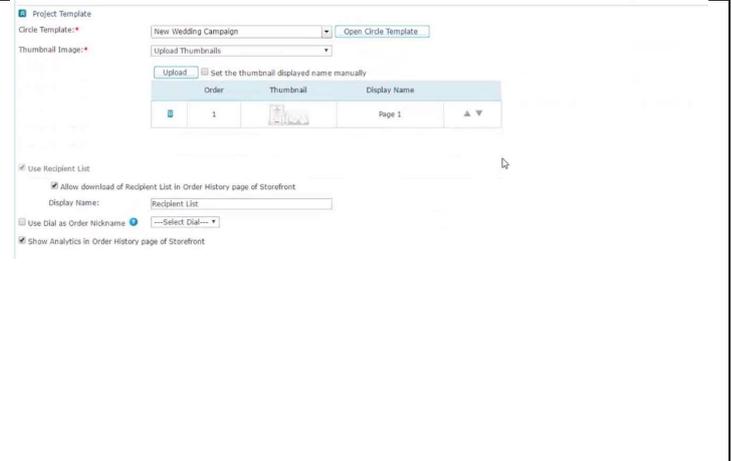
Now, select your Circle project name.

The resources zip folder also contains a thumbnail image for you to upload here.

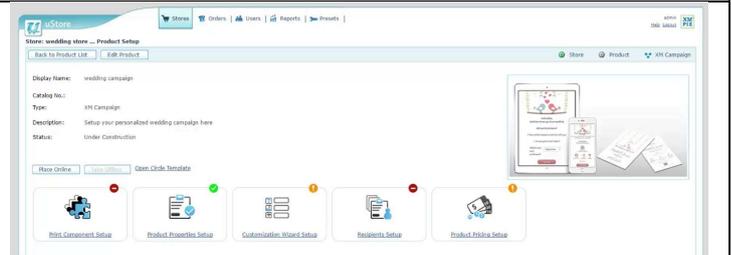
If you want to allow the customer to download the recipient list, you should leave this checked.

And this one enables the customer to view the analytics in the order history area.

They are enabled by default, but you have the option to turn them off if needed.



Once you save your product, you have some more settings to complete.

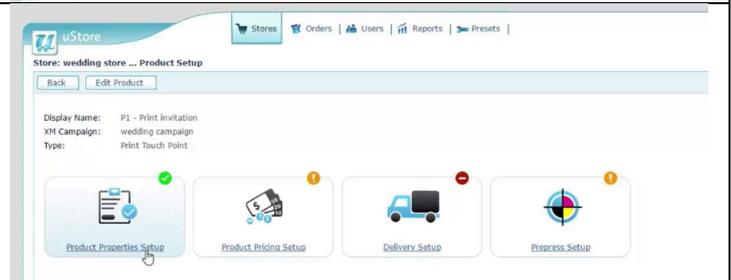


First, you will need to setup the Print component. Click the Print Touchpoint name.

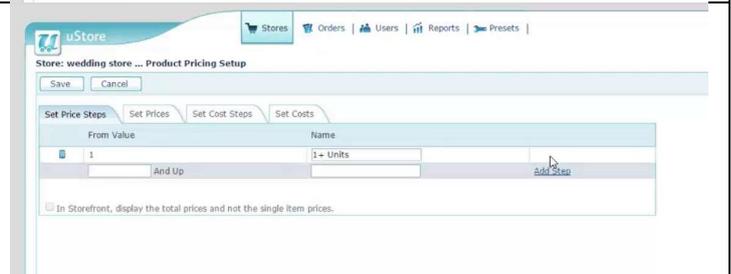


Here you can define Product Properties, Product Pricing, Delivery Setup and Prepress Setup.

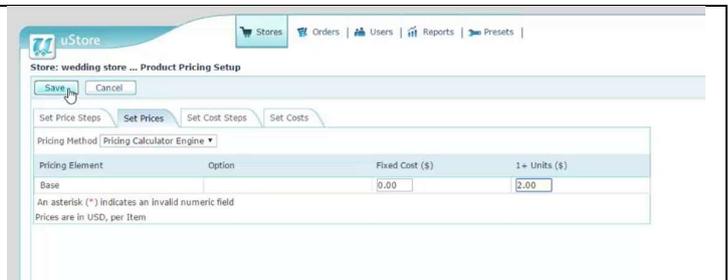
If you need to set a paper type or other properties on the print piece, you can do that here.



I will set a pricing step from one and up.



And set a price per unit of \$2.



Click the delivery setup button and configure a mailing price.



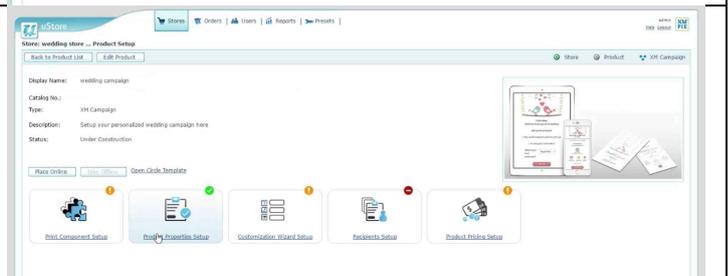
I will set \$1 each regardless of quantity.

You can also set a prepress workflow for the print product, but it is not necessary in this case.

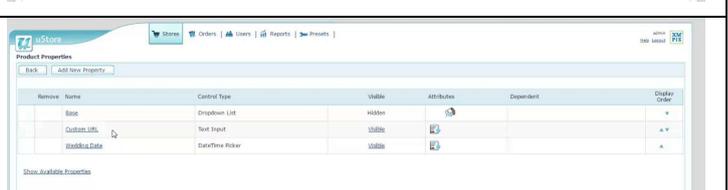


When we go back to the top Cross Media product, you will see that we also have Product Properties and Pricing Setup for the entire campaign as well.

While Print Component setup manages those options for just the print touchpoint, these settings are on the entire project, so the price is cumulative.



Let's start with product properties. Notice that the Custom URL property is defined automatically and is mandatory.



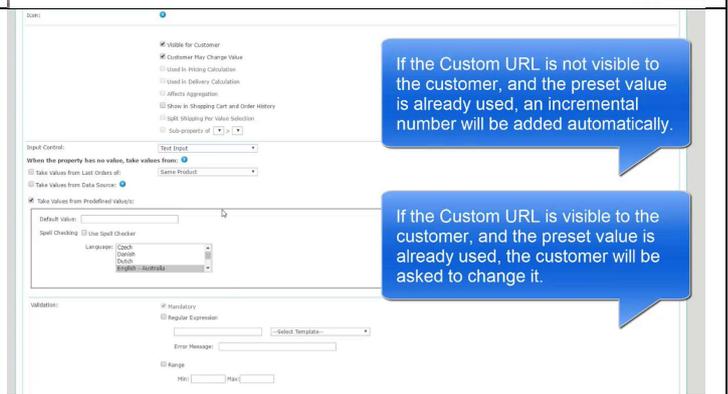
This is used to setup the Campaign URL with an instance ID – which was shown in the introductory video.



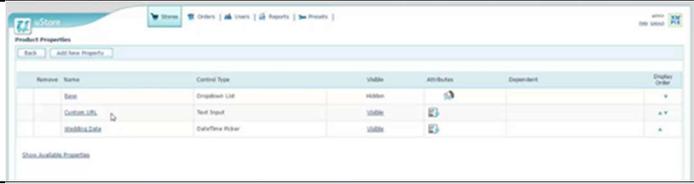
You can set a default value - possibly prepopulated from a data source - and choose to hide it from the customer.

Remember that if you hide it from the customer, and the value has already been used, it will get an incremental number added.

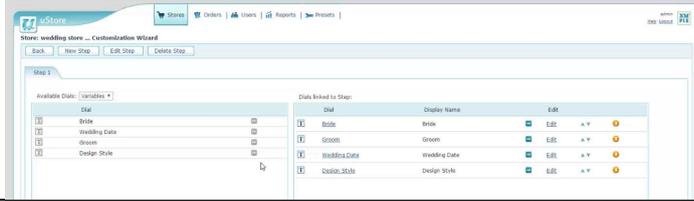
Also, If you preset it, and display it to the customer, the customer will be asked to change the id if it has already been used by another campaign instance.



The Wedding Date property is also setup automatically, but was read in from the Project Parameter we created in Circle.



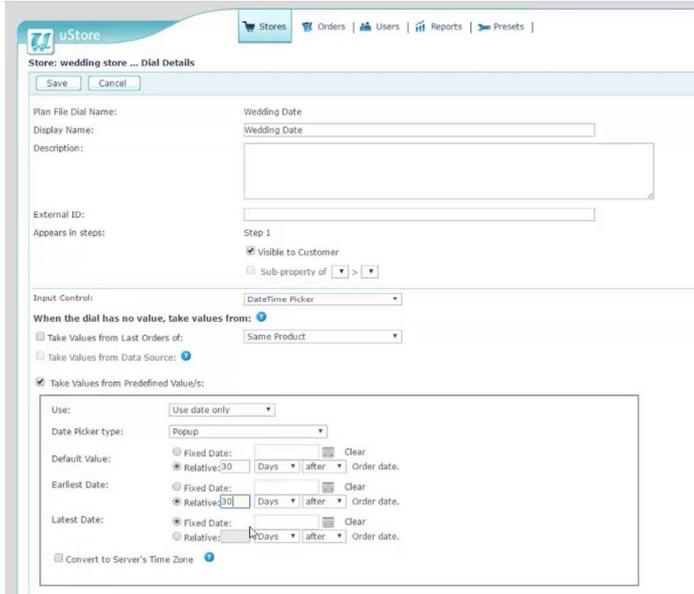
For the customization step, swap to the variables list and add the Bride, Groom, Wedding Date and Design Style variables to the step.



Edit the Wedding Date dial.

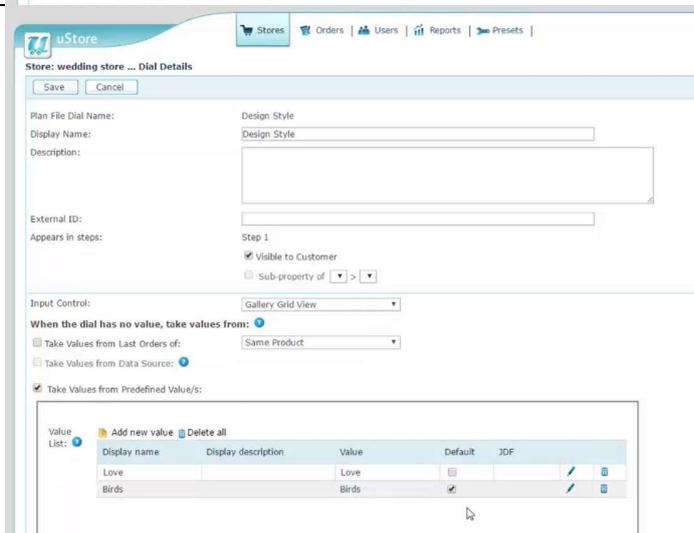
Select the DateTime picker for the input control. We only need the date in this case.

I will set the default date to be 30 days from the order date and prevent the customer from selecting a date any earlier than that.



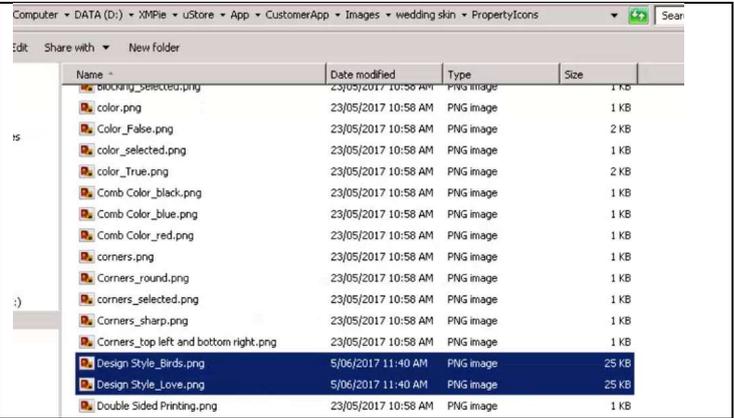
For the Design Style dial, set the Gallery Grid View input control and set the available values to Love and Birds.

I'll set the default to be Birds.



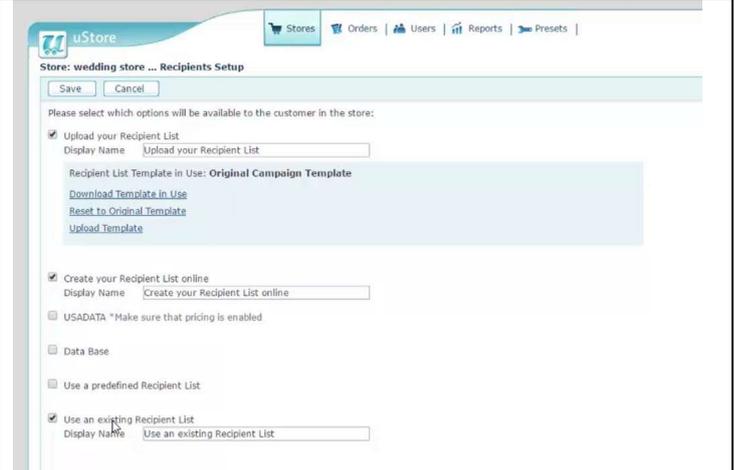
We also need to copy the two images to the property icons folder inside the skin folder that we created earlier when we duplicated the default skin.



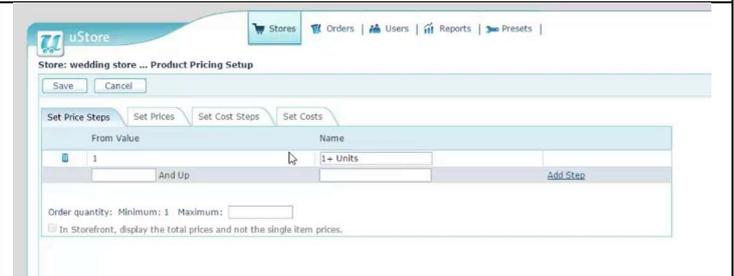


Next, select the recipient setup. I will allow the customer to upload a list, create their own list online, and use an existing recipient list.

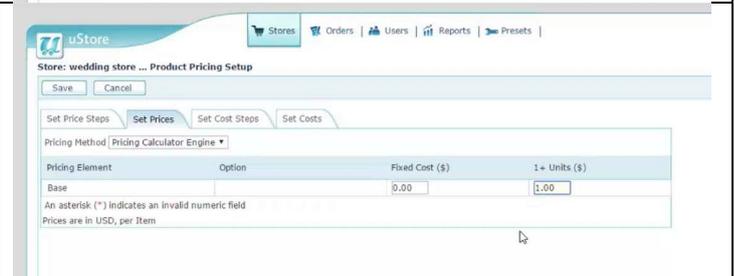
Remember this new predefined recipient list is demonstrated in a separate video in this series.



For the campaign price, I will add an additional dollar per recipient to cover the cost of email messages.



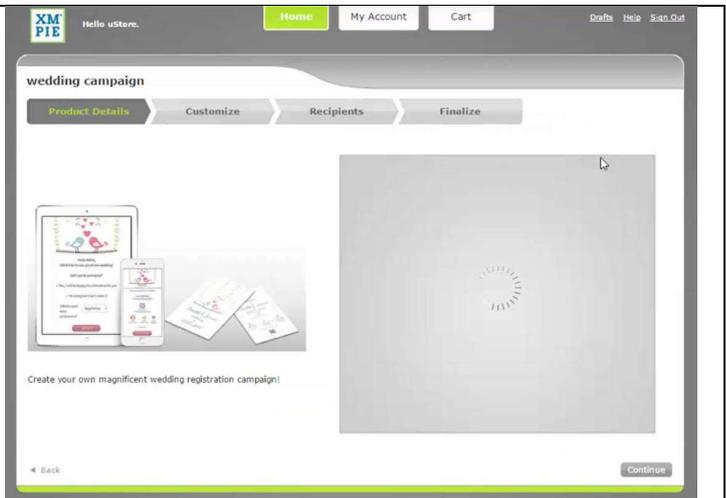
Remember this is in addition to the Print Touchpoint price.



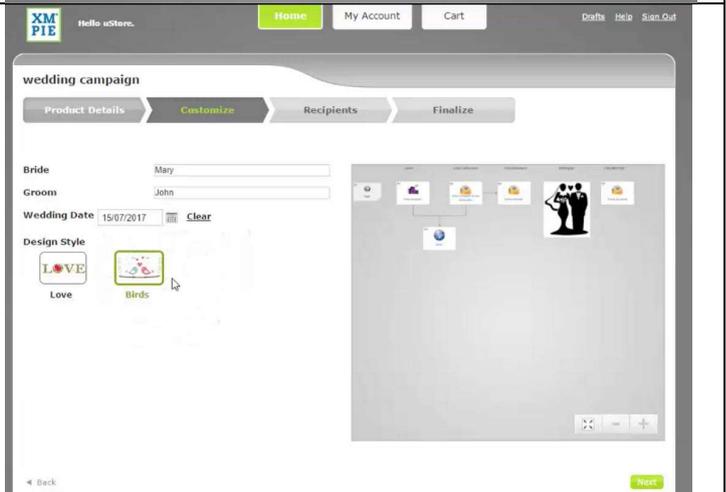
OK, let us put the product online, go back and preview the storefront.



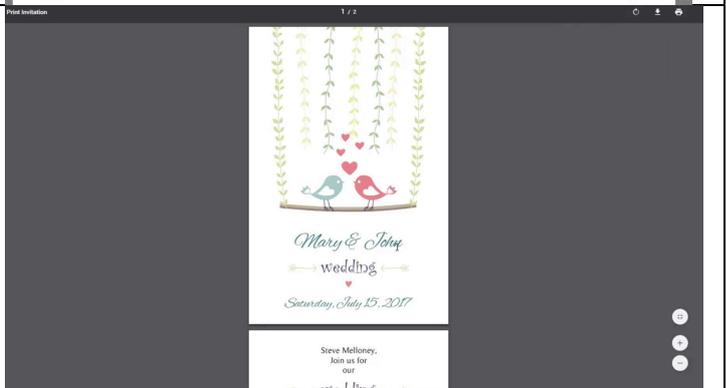
It does take some time for all the background processes to duplicate everything in Circle and uProduce.



Let's wed Mary and John on July 15th.

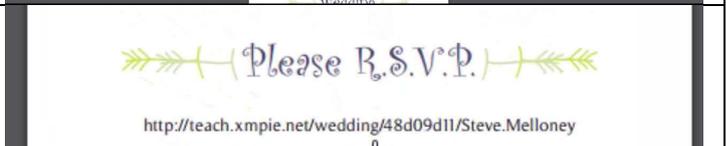


The document preview looks good.



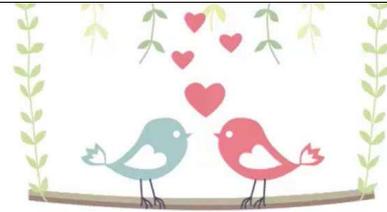
Note that the campaign URL has a temporary placeholder until we define the Custom URL on the finalize step.

And the recipient part is a sample because we haven't uploaded our recipient list yet.



We can also test the website.

Any tests at this point will not be recorded by Marketing Console and the recipient database will be updated when the order is submitted.



Hello Steve,
We'd love to see you at our wedding!

Will you be joining us?

- Yes, I will be happy to celebrate with you
- I'm sorry but I can't make it

SEND

On the recipient list step, I will upload our test database.

A screenshot of the 'wedding campaign' interface in the 'Recipients' step. It shows instructions for uploading a recipient list file. A file named 'Guests.xlsx' is selected, and the list name is 'Guests'. There are radio buttons for 'Create your Recipient List online' (selected) and 'Use an existing Recipient List'.

wedding campaign

Product Details Customize Recipients Finalize

Upload your Recipient List

Upload your Recipient List file, or Download a recipient list template using the 'Download Recipient List Template' link. Edit the template using any spreadsheet editor such as Microsoft Excel or OpenOffice Calc. Save the recipient list as XSL Spreadsheet. Upload it back using the 'Browse' button. File (*.xml, *.xls, *.xlsx, *.mdb, *.accd, *.csv delimited by ";"): Choose File Guests.xlsx List Name: Guests Download Recipient List Template

Create your Recipient List online Use an existing Recipient List

We can then test the campaign for say Jenna Smith...

A screenshot of the 'wedding campaign' interface in the 'Recipients' step, showing a table of guests. The table has columns for ID, F Name, L Name, Email, Gender, City, and Count. Five guests are listed, including Jenna Smith.

wedding campaign

Product Details Customize Recipients Finalize

Guests

Add New Delete

Operations	ID	F Name	L Name	Email	Gender	City	Count
<input type="checkbox"/>	1	Steve	Melloney	noreply@xmpie.net	M	Forest Glade	South A
<input type="checkbox"/>	2	Mary	Fredrickson	noreply@xmpie.net	F	Jacobs Bay	South A
<input checked="" type="checkbox"/>	3	Jenna	Smith	noreply@xmpie.net	F	St. Helena Bay	South A
<input type="checkbox"/>	4	Julie	Jones	noreply@xmpie.net	F	Cape Town	South A
<input type="checkbox"/>	5	Robert	Schneider	noreply@xmpie.net	M	Sutherland	South A

On the finalize step, we can set the Custom URL and we need to set the Wedding date again.

This one will set the Circle Project Parameter which will be used for the scheduling and automation.

We hope that a future version will enable setting this from a customization step dial to prevent the duplication.

A screenshot of the 'wedding campaign' interface in the 'Finalize' step. It shows a 'Custom URL' field with 'MaryAndJohn', a 'Wedding Date' of '15/07/2017', and a summary of the order: 10 recipients, total quantity 10, price per recipient \$3.00 USD, total delivery price \$10.00 USD, and total price \$40.00 USD. There is a 'Recalculate' button and an 'Add to Cart' button.

wedding campaign

Product Details Customize Recipients Finalize

Custom URL [Julia's site] MaryAndJohn

Wedding Date 15/07/2017 Clear

The order will be delivered by: Mail Drop

Number of Recipients: 10
Total Quantity: 10
Price Per Recipient: \$3.00 USD
Total Delivery Price: \$10.00 USD
Total Price: \$40.00 USD

Recalculate

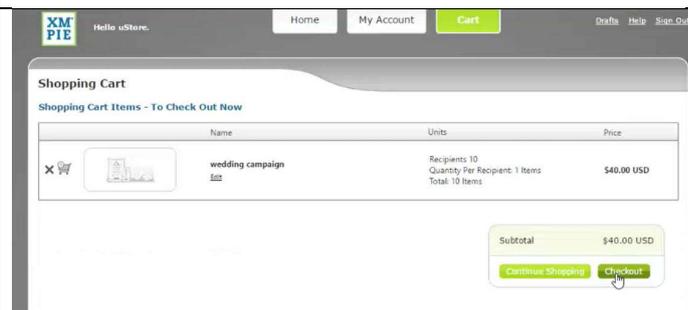
Back Add to Cart

If we test now, we can see the full URL with the Custom URL value and the recipient data.

Again, we could test the campaign here – the events are not recorded by Marketing Console and the recipient data will be uploaded again when we check out so that any data updates by the campaign website will not reflect our tests.



Now the product is in the cart, we can checkout in the usual way.



In the next video, we look at handling cross media product orders in uStore admin.

