XMPie Campaigns on Demand

Transcript for: uStore setup

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Notices

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Voice over script	Thumbnail
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.	XMPie Campaigns On Demand Ustore setup V uStore; v9 PersonalEffect May 2017
To start, login to your uStore admin site. First we will check some settings that are required only once.	Campaigns On Demand
	 uStore settings (once off) Creating a store Adding an XM product
In the Presets area. click PersonalEffect Connections.	© 2000-2017 XMPie, A Xerox Company All Rights Reserved.
This option was previously called uProduce Connection. Now, it offers setup of both uProduce and Circle credentials.	With With With With With With With With
First, click uProduce.	Image: Store Image: Stores Image: Stores </th
You need to setup a uProduce user that uStore can use to access the documents on the XMPie production server.	W Store W Stores M Users M Reports >> Presets UProduce Connection Setup
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.	

Next, click back and click Circle. If your Circle user	🔐 UStore 🛛 🐨 Stores 🛛 🕱 Orders 🎽 Users 🗍 👬 Reports 🗩 Presets
account is not listed, click to add it.	Circle Connection Setup
Enter the Circle username and password, and	Save Cance
Connect.	Circle Password:
	Connect O
That's it for settings. Click Stores, and click to create	
a New store.	
Enter a store name.	Verse
Select your uProduce user and then enter the	Errer Errer &
nassword and test to confirm that you are permitted	Dan Kane* indidig dan Dan Kane* Redicid Dan (20) * Redicid Dan (20) *
to use the account.	Eternal Is.
	United to the second se
And, repeat for the Circle user.	Handhart Lagin Hanagement Lagin saving Der tentisk semantemen
	Other automatic the toxicial affects by small (Date by) Personalithed Connections
Of course, you can make other settings, but I will	alholan Canadian* dire Papaad******** Ø 1880 Crist Canadian*********************************
highlight the ones necessary for the sample store.	Indexts a register field Control of the co
Click the Appearance tab, and click to duplicate the	To date all traces all trac
Skin XMPie Green.	Stars Stars Even / Texas Stars Others Sta
	Store State Stele hume: Water (Store Autor)
I'm copying the skin so we can set the property icons	Annalar Man dorika Dia nonviewe Cap 1
used in the sample store without changing the	Degrade Site Set Minister U
default skin folder.	None hape Walkane face:
We will convithe images later	in overlater transport
	Product List Gorby Day. (Sequence Assembly *)
	Nadir A Tonin Caldan Hader O Caldan Fader O
Scroll down and check the box for the setup culture	And they Charter Charter Annue
to be English.	Implifie 2 . Implifie 2 . Implifie 2 . Implifie 2 . <th< th=""></th<>
	Oder Carlinguita Text:
	Annie Andre
Click the Clearing tab, and enable the Invoice	Store State State State
clearing method.	Sm Sm<
	Brane Digitary Name # b b / Innoise Innoise = 0 / Other Manue Other Manue
Click the Delivery settings tab. For this example.	TT USTore Tom I Green de Unen de Reports tom Provide The Provide
there is a print piece to be mailed out, so we need	Store Schip Store Schip If the schip
the Manual Mailing option to remain checked, but	General Vaganamon Otaring Dahwy Sentega Otahwy Sentega Otahwy Sentega Vahanatata Dahwy Setta Dahwy © Statak Dahwy © Statak Dahwy
you can make other changes as required.	Consequence Monitory Monitory Monitory Monitory
	P front flying Extension
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	👿 UStore 🕱 Orders 🚵 Users 👬 Raports 🗩 Presets
i or vivi Cattipaign.	Store: wedding store Preview Image: Store Setting
	s of Products: 0 Pending Orders: Status: Online Storefront Groups Product Group: Group1 Manage Group
	- © Group1.00 Type Sequence - Product Name Type Sequence -
	Component Groups (hidden)

Give the product a name.	UStore 🕼 Orders 🚵 Users 🚮 Reports 🌫 Presets
Add a short description.	Store: wedding store Product Setup Store: wedding campaign General Product Kame:* vedding campaign Catalog No.
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.	ren Unexuption: Compared Table 74 (2019 - 2019 - 2019) Compared Table 74 (2019 - 2019 - 2019) Compared Table 74 (2019 - 2019) Co
Now, select your Circle project name.	Project Template Circle Template.* New Wedding Campaign (
The resources zip folder also contains a thumbnail image for you to upload here.	Updaal II Set the thumbhall displayed name manually Order Thumbhall Display Name II 1 Prop. 1 A V
If you want to allow the customer to download the recipient list, you should leave this checked.	Consequence State Recipient List in Order History page of Storefront Classay Rames: Recipient List Classay Rames: Recipient List Solute Richarane Solute Richaranee Solute Richaraneee Solute Richaranee Solute Richaranee Solute Richaranee Solute Richaranee Solute Richaranee Solute Richaranee Solute Richaraneee Solute Richaraneee Solute Richaranee Solute Richaraneeee Solute Richaraneeeee Solute Richaraneeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeee
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.	Image: State of the local state of the
First, you will need to setup the Print component. Click the Print Touchpoint name.	UStore Vorders A Users A Users A Presets
	Back Click the touchpoint name for more setup options ID Touchpoint Name Status 14 Pi - Print invitation C
Here you can define Product Properties, Product Pricing, Delivery Setup and Prepress Setup.	UStore Stores Orders M Users M Reports > Presets Store: wedding store Product Setup Back Edit Product
If you need to set a paper type or other properties on the print piece, you can do that here.	Display Name: P1 - Print Invitation Xrf campaign: wedding campaign Type: Print Touch Paint Product Properties Setur Product Prioritic Setur Product Prioritic Setur
I will set a pricing step from one and up.	W Stores W Orders M Users Iff Reports Improved Presets Store: wedding store

And set a price per unit of \$2.	🐨 UStore 🗑 Stores 🕱 Orders 🚵 Users 👬 Reports 🛥 Presets
	Store: wedding store Product Pricing Setup
	Save b Cancel
	Set Price Steps Set Prices Set Cost Steps Set Cost Set Costs Pricing Method Pricing Calculator Engine
	Pricing Element Option Fixed Cost (\$) 1 + Units (\$)
	Base 0.00 2.00 An asterisk (*) indicates an invalid numeric field
	Prices are in USD, per Item
Click the delivery setup button and configure a	😿 Stores 🕷 Orders 🚵 Users 🚮 Reports 🗯 Presets
mailing price.	Store: wedding store Delivery Setup
	Save Cancel Ceneral Priding Tax
	Delivery Methods R/ Malling
	U Shipping
	Pickup address (Produced internally)
I will set \$1 each regardless of quantity.	🐺 UStore 🕱 Orders 🚵 Users 👬 Raports 🗩 Presets
You can also get a proprose workflow for the print	Store: wedding store Delivery Setup Save Cancel
product, but it is not possessary in this case	General Priding Tax
product, but it is not necessary in this case.	Delivery Prices
	Planual Hasing From Quantity Mail Drop (\$)
	No records exist Note: Prices are per unit
When we go back to the top Cross Media product.	TT InStore Total & Uses & Foots & Foots & Foots
you will see that we also have Product Properties	Store: wedding store Product Setting Back to Product U.K. StdP Product @ Store: @ Product V. All Company
and Pricing Setup for the entire campaign as well.	Daptay Name vesting company Codely Na:
	Type: 2H Campage Deceloption: Seture year promotion for the granular have Deceloption: Seture year promotion for the granular have
While Print Component setup manages those	Rea Office Torontomic Green Circle Image
options for just the print touchpoint, these settings	
are on the entire project, so the price is cumulative.	No. Data (Arrowson Line) Description (Arrowson Line) <thdescription (arrowson="" line)<="" t<="" th=""></thdescription>
	1
Let's start with product properties. Notice that the	To class 🕹 Come 🎽 Come 😹 Come 😹 Reports Section
Custom URL property is defined automatically and is	Product Properties Bots Add free Priperty
mandatory.	Remove Name Carabia Type Validies Dependent Digitary Base Drophone List Holder State *
	Contentité De lour Malle De lour Av
	2au Julié Anadia
This is used to setup the Campaign URL with an	
instance ID – which was shown in the introductory	wedding campaign
video.	Product Details Customize Recipients Finalize
	Custom URL* [v/hat's this?] MaryAndJohn
	Desco B STOD
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	http://teach.xmpie.net/wedding/MaryAndJohn/Steve.Melloney
	0
You can set a default value - possibly prepopulated	R Mate for dationer
from a data source - and choose to hide it from the	Content Nets Control Cont
customer.	Since approximate and the second seco
	depend of the least of the
Remember that if you hide it from the customer, and	Id Max Values Nore Last Orden al: Serem Product T
the value has already been used, it will get an	If the Custom URL is visible to the
incremental number added.	Language Cast Man Anno 1999 Anno 1
	asked to change it.
Also, if you preset it, and display it to the customer,	Chapter Larender
the customer will be asked to change the id if it has	
already been used by another campaign instance.	MUMAQ

The Wedding Date property is also setup	View View (d text) (d text) (d text) (d text)	1
automatically, but was read in from the Project	Protect Projection 6.6 Add free Projecty	
Parameter we created in Circle.	Nenner Kanne Gerten Toje Vidde Athbiete Dependent Diver Eter Drugdeus Litt Hilden Staten V V	
	Dotaullis b bortput billine ED Av Bibliolities Downlow fiber BD A	
	2an Auldit Izantin	
For the customization step, swap to the variables list	to Criene Ma Users Ma Users Ma Papers ≫ Preses 100 mm	1
and add the Bride, Groom, Wedding Date and Design	Store: weedling store Contonization Witard Back New 500 Edites 500 Context 500	4
Style variables to the step.	9491 Available Date: "Wooddaw" Date: "	
, , , , , , , , , , , , , , , , , , , ,	Dial Dial <th< th=""><th></th></th<>	
	Image: Control of the state of the	
Edit the Wedding Date dial.	771 UStore 🕷 Orders 🕍 Users 👬 Reports 🖕 Presets	
	Store: wedding store Dial Details	
Select the DateTime picker for the input control. We	Save Cancel Plan File Dial Name: Vieldfion Date	
only need the date in this case.	Display Name: Wedding Date	
	uesu (kon)	
I will set the default date to be 30 days from the	External ID:	
order date and prevent the customer from selecting	Appears in steps: Step 1	
a date any earlier than that.	□ Sub-property of ▼ > ▼	
	Input Control: DateTime Picker When the dial has no value, take values from:	
	Take Values from Last Orders of: Same Product Take Values from Data Source:	
	C Take Values from Predefined Value/s:	
	Use: Use date only	
	Default Value: Picked Date: Clear Clear	
	Earliest Date: Earliest Date: International Date: Earliest Date: Earliest Date: International Date: Earliest Date: International Date: Internation	
	Latest Date:	
	Convert to Server's Time Zone	
For the Design Style dial, set the Gallery Grid View	UStore 🕷 Orders 🚵 Users 👬 Reports 🗩 Presets	
input control and set the available values to Love and	Store: wedding store Dial Details Save Cancel	
Biras.	Plan File Dial Name: Design Style	
	Display Name: Design Style Description:	
Fil set the default to be Birds.		
	External ID:	
	Appears in steps: Step 1	
	Sub-property of V > V	
	When the dial has no value, take values from: 2	
	Take Values from Data Source:	
	Take Values from Predefined Value/s:	
	Value List: Add new value Delete all	
	Love Love Caller Value Love Caller Love	
	euros Birols V V	
We also need to convithe two images to the	This PC > Deckton > Wedding Campaign Recourses > uStore skin Property isons	_
property icons folder inside the skin folder that we		
created earlier when we duplicated the default skin	LOVE	
o cated carner when we adplicated the default skill.	Design Design Style_Birds.png Style_Love.png	

	Computer + DATA (D:) + XMPle + uStore + App + CustomerApp + Images + wedding skin + PropertyIcons 🔹 😭 Sean
	Edit Share with 🔻 New folder
	Name * Date modified Type Size
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	Design Style_Birds.png 5/06/2017 11:40 AM PMG image 25 KB
	Contraction of the second
Nove called the registered cature I will allow the	
Next, select the recipient setup. I will allow the	🐨 Stores 🐩 Orders 🚵 Users 👬 Reports 🗫 Presets
customer to upload a list, create their own list	
online, and use an existing recipient list	Store: wedang store kecipients Setup
onime, and use an existing recipient list.	Please select which ontions will be available to the customer in the store:
	🕑 Upload your Recipient List
Remember this new predefined recipient list is	Display Name Upload your Recipient List
	Recipient List Template in Use: Original Campaign Template
demonstrated in a separate video in this series.	Download Template in Use Reset to Original Template
	Upload Template
	Create your Recipient List online
	Display Name Create your Recipient List online
	USADATA "Make sure that priong is enabled
	Data Base
	Use a predefined Recipient List
	Use an existing Recipient List Display Name Use an existing Recipient List
For the compaign price, I will add an additional dollar	
For the campaign price, I will add an additional dollar	🐨 Stores 🕷 Orders 🏜 Users 🏦 Reports 🛥 Presets
per recipient to cover the cost of email messages.	Store: wedding store Product Pricing Setup
	Save Cancel
	Set Price Steps Set Prices Set Cost Steps Set Costs
	From Value Name
	1 And the
	And Ob Hog 2002
	Order quantity: Minimum: 1 Maximum:
	In Storefront, display the total prices and not the single item prices.
Remember this is in addition to the Print Touchpoint	
	👿 UStore 🕅 Orders 🚵 Users 👬 Reports 🗯 Presets
price.	Store: wedding store Product Pricing Setup
	Save Cancel
	Set Price Steps Set Cost Steps Set Cost Steps
	Pricing Method Pricing Calculator Engine
	Pricing Element Option Fixed Cost (\$) 1+ Units (\$)
	Base 0.00 1.00
	Prices are in USD, per Item
	k ₽
OK, let us put the product online, go back and	XM Hello ustore. Home My Account Cart Drafts Hele Sign.Out
provide the storefront	
preview the storemont.	
	Group1 Group1
	wedding campaign
	Setup your personalized wedding campaign here Place an Order >
	Q Enlarge



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.	Medio ustione. Nome My Account Cart Danks Medio Sinn Out wedding campaign Product Details Customize Finalize * Upload your Recipient List Boundead a recipient fait template sing the Doubled Recipient List Template link. Upload your Recipient List Replace to the template sing the Doubled Recipient List Template link. See the recipient Recipient States and Specifier Cale. See the recipient Recipient List Template If le (*-m), *ask, *asks, *.mdb, *accub, *.exe delimited by *,?): Choose File Guests xfsx Outerhad Recipient List Template © create your Recipient List
We can then test the campaign for say Jenna Smith	My Account Cart Derds Hele Sent.Out wedding campaign Product Details Custamize Recipionts Finalize Guests Custamize Recipionts Finalize Gerston D F Name Loarne Email Gerston D F Name Loarne T Y Y Y Y Y X S 1 Stere Meloney norepty@mpie.net M X S Janos Smth norepty@mpie.net F Subth A X S Balana Smth norepty@mpie.net F Cape Town 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.	Image: State of the underset Image: State of the underset

If we test now, we can see the full URL with the Custom URL value and the recipient data.	C ① teach.xmpie.net/wedding/MaryAndJohn/Steve.Melloney
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.	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
Now the product is in the cart, we can checkout in the usual way.	Home My Account Cart Drafts Hele Size.Out Shopping Cart
	Shopping Cart Items - To Check Out Now Name Units Price X I Units Price Price uedding campaign Bacipiers 10 Quantify Per Respontent Items \$40.00 USD Solitati 10 Items Solitati 10 Items \$40.00 USD
In the next video, we look at handling cross media product orders in uStore admin.	Verte withow Henne My Account Cart Deaths Made Sourc.out