

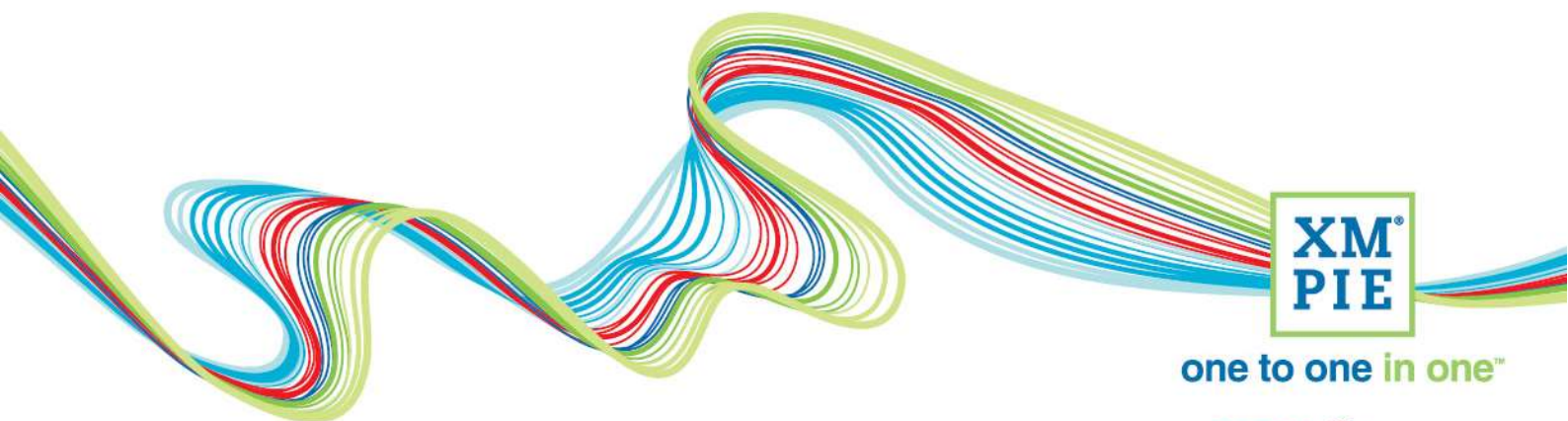
XMPie Campaigns on Demand

Transcript for: Predefined Recipient List

Document version: v1

Software version: v9.0.2

Published date: June 2017



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U.S. Patents 6948115, 7406194, 7548338, 7757169 and pending patents.

JP Patent 4406364B and pending patents.

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Voice over script

Hi. Welcome to XMPie. In this module, I will demonstrate the new predefined recipient list feature that is introduced in uStore version 9.

This new recipient list type is designed to use a recipient list that has been uploaded to uProduce via Circle.

So, what's new I hear you ask? uStore has had the ability to use a uProduce data source for years.

Well the Predefined Recipient List has two very powerful advantages:

Firstly, the uStore administrator can configure it to filter the uProduce list and show the customer only recipients relevant to them.

– For example, sales people could be shown only recipients from their region.

In this case, the I see only recipients for whom I am the Area Manager. Based on my uStore login.

You can see that the list returns 400 recipients,

and if I open the original Excel, you can see the rows that were hidden and the list has a total 1000 records.

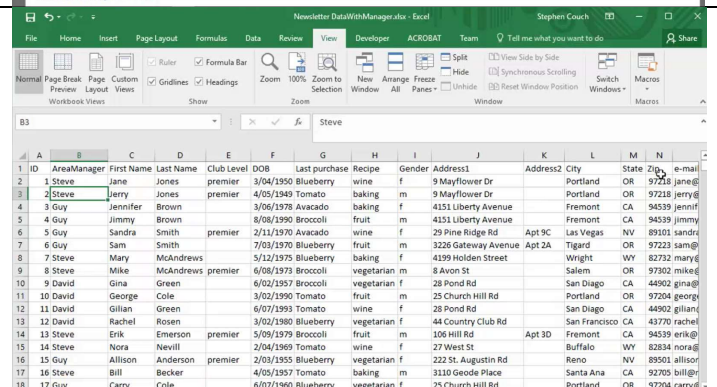
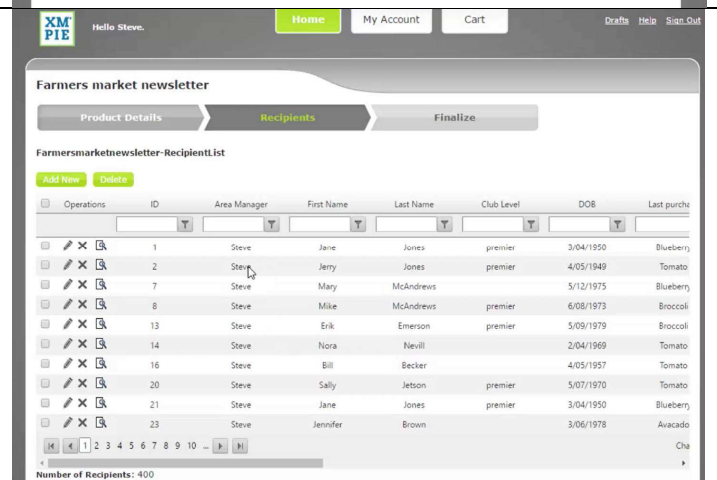
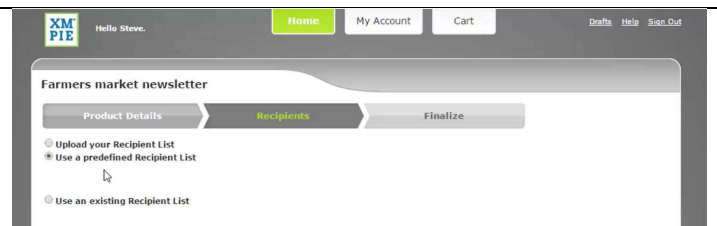
Thumbnail



Predefined Recipient List

- uStore admin can filter the list provided to the user

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Secondly, the buyer's selections on the customization step can also be used to filter the list of recipients.

– For example, if the buyer selects to customize this newsletter for customers who purchased Tomatoes,

then on the recipient list, only recipients who last purchased Tomatoes are selected.

Also, in this case I am combining it with the logged in user as the area manager.

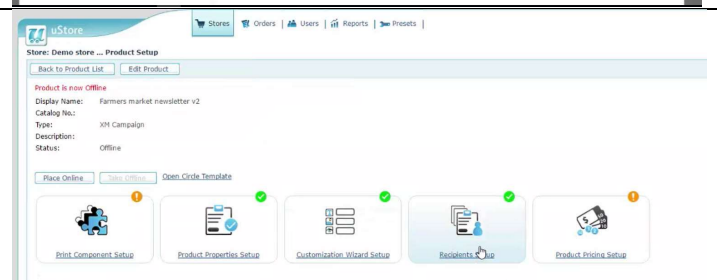
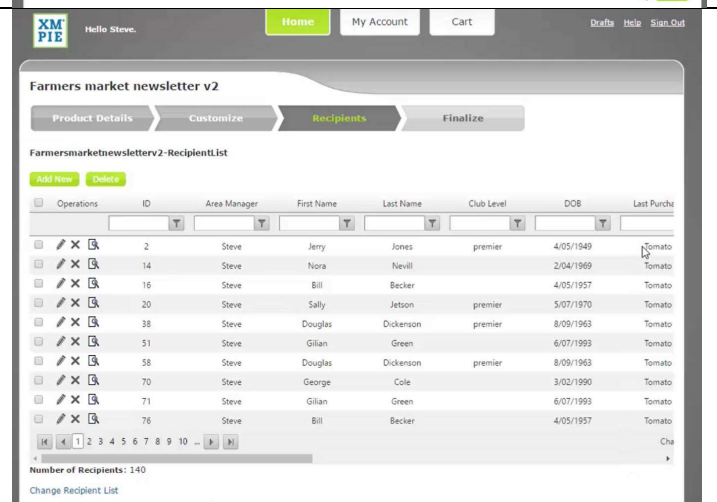
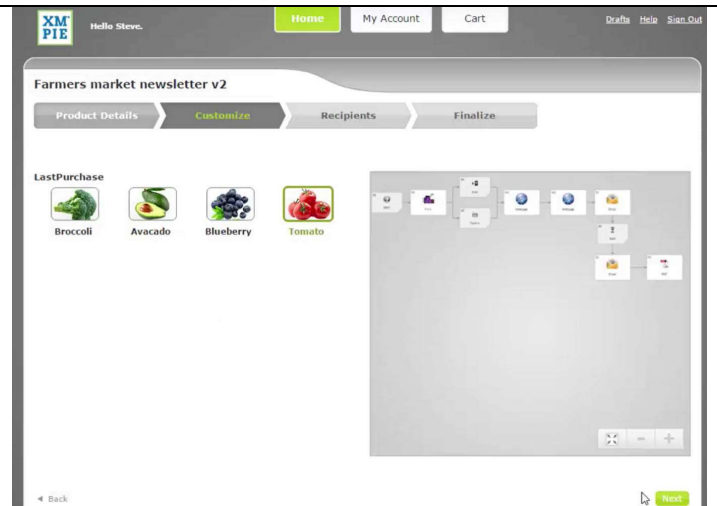
So, let's take a look at how the Predefined Recipient List is configured in uStore Admin.

On the recipient list setup for this product,

Predefined Recipient List

- uStore admin can filter the list provided to the user
- Buyer's customizations can also filter the list

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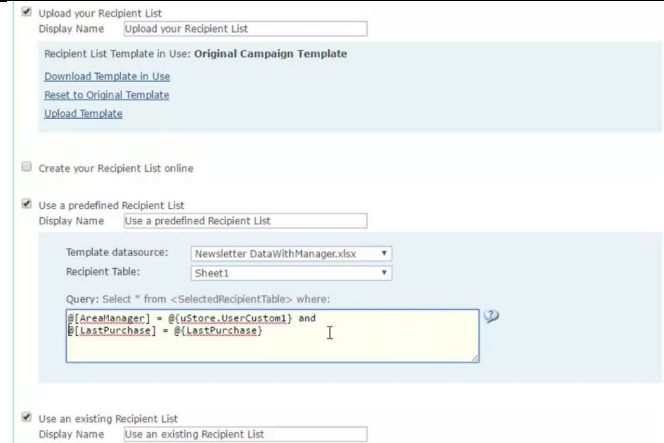


I have turned on the Predefined Recipient List option.

I've selected the recipient list data source and table from the Circle project.

This text area allows you to define the query.

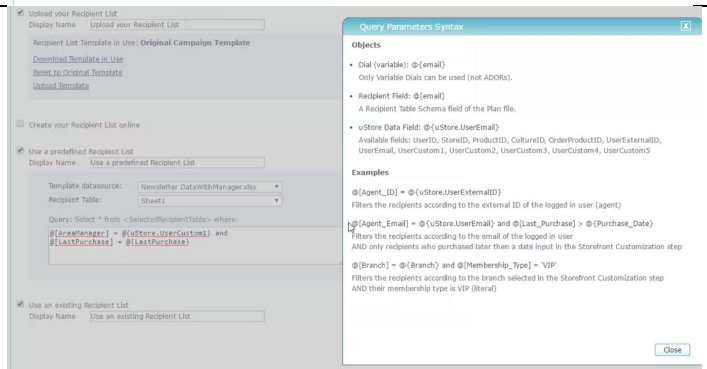
The first part of the select is not needed. You just enter the "Where" part of the query.



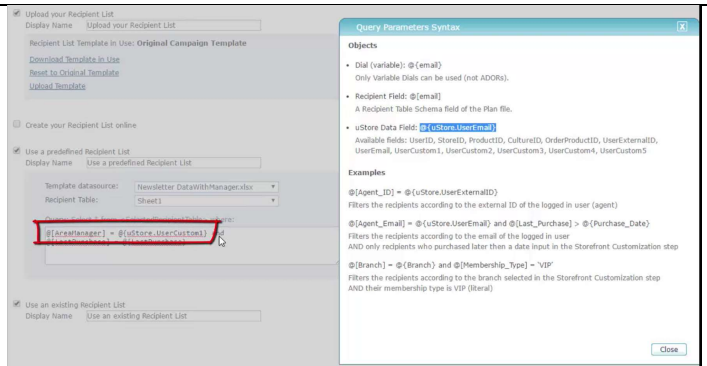
Now, what is the syntax of the fields I've used? – Click the question mark to get more information and help.

The recipient list data fields use the @ symbol and square brackets.

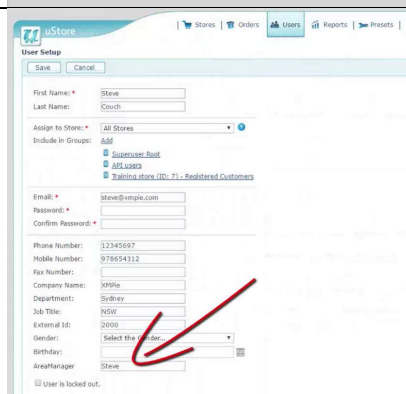
And uStore database fields use the @ and the curly brackets and include the uStore_ keyword.



So this first part is asking for records where the AreaManager field in the recipient data is the same as the uStore User Database's UserCustom1 field.

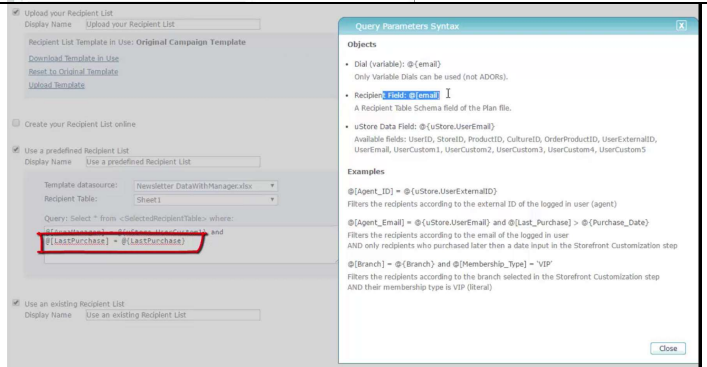


For my store users, this field is setup as the Area Manager.



The second part of the query is to select the recipient table rows where the Last purchase field is the same as the variable dial "Last purchase".

You can see that Variable dials also use the curly brackets, but don't have the uStore_ prefix.



The info panel also has some examples for you to use in future.

It's also worth pointing out that the value can be a string – for example `Membership_Type = 'VIP'` – assuming that your recipient list has a "Membership_Type" column and the values include this text.

The screenshot shows the 'Create your Recipient List online' section of a software interface. It includes options to 'Upload your Recipient List' or 'Use a predefined Recipient List'. The 'Use a predefined Recipient List' option is selected, and a 'Query Parameters Syntax' popup is open on the right. The popup contains a list of 'Objects' and 'Examples' for query construction.

Query Parameters Syntax

Objects

- Dial (variable): `@{email}`
Only Variable Dials can be used (not ADORs).
- Recipient Field: `@{email}`
A Recipient Table Schema field of the Plan file.
- uStore Data Field: `@{uStore.UserEmail}`
Available fields: UserID, StoreID, ProductID, CultureID, OrderProductID, UserExternalID, UserEmail, UserCustom1, UserCustom2, UserCustom3, UserCustom4, UserCustom5.

Examples

`@{Agent_ID} = @{uStore.UserExternalID}`
Filters the recipients according to the external ID of the logged in user (Agent)

`@{Agent_Email} = @{uStore.UserEmail} and @{Last_Purchase} > @{Purchase_Date}`
Filters the recipients according to the email of the logged in user AND only recipients who purchased later than a date input in the Storefront Customization step

`@{Branch} = @{Branch} and @{Membership_Type} = 'VIP'`
Filters the recipients according to the branch selected in the Storefront Customization step AND their membership type is VIP (literal)