XMPie Cross Media Training Series

Transcript for: Using quick start

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one to one in one™

A xerox Company

Notices

U.S. Patents 6948115, 7406194, 7548338, 7757169 and pending patents.
JP Patent 4406364B and pending patents.

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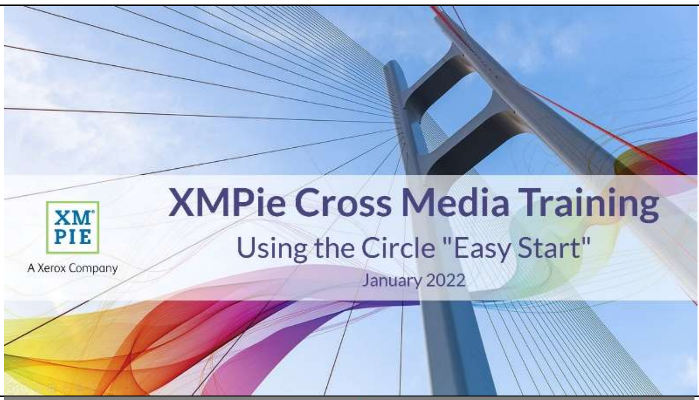
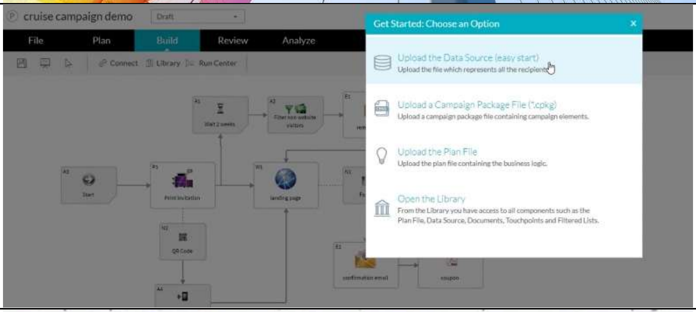
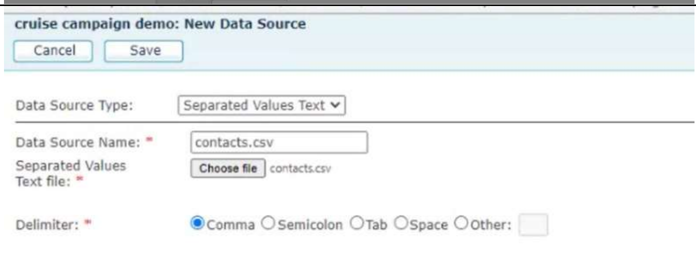
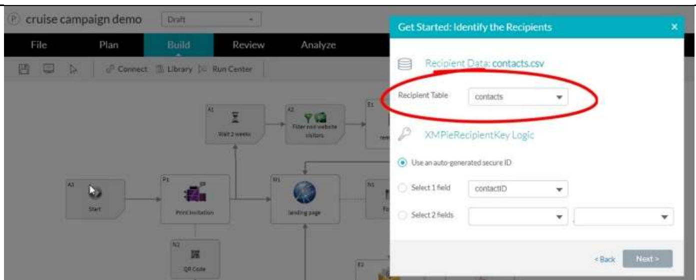
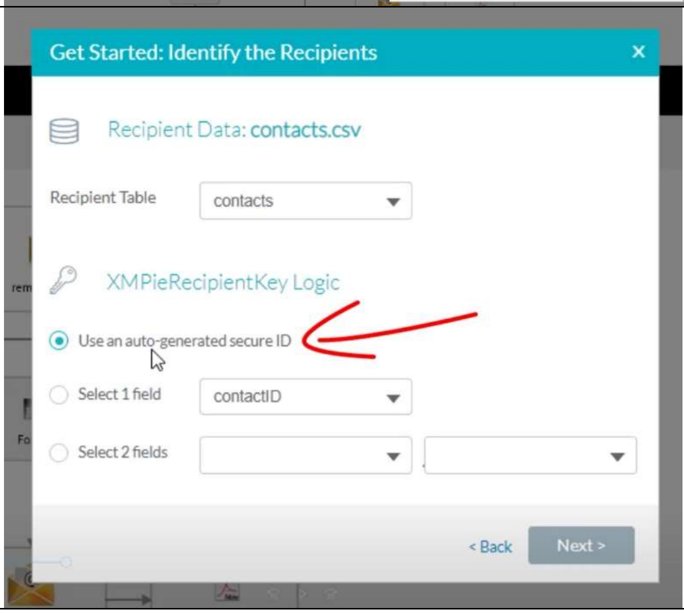
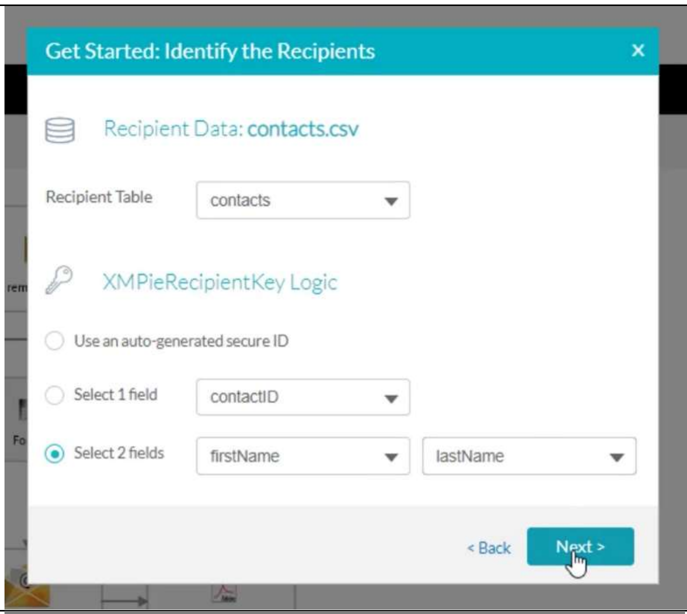
Voice over script	Thumbnail
Hi! Welcome to XMPie PersonalEffect Cross Media. In this tutorial we start our campaign setup by using the Circle "easy start" to upload a data source and automatically create a plan file.	
After connecting to uProduce, you should be at this dialog. Click the Upload data source (easy start) option.	
Select the data source type and browse for the file.	
The next dialog allows you to select the recipient table. For a csv or text file, there is only one table, but if you uploaded an Excel file with multiple tabs, you need to select the correct table here.	
You can then choose how to define the recipient key. If your campaign includes sensitive or private information, you can automatically create a SecureID by selecting this option. Or, you can select a field from the recipient database to be used as the recipient ID.	

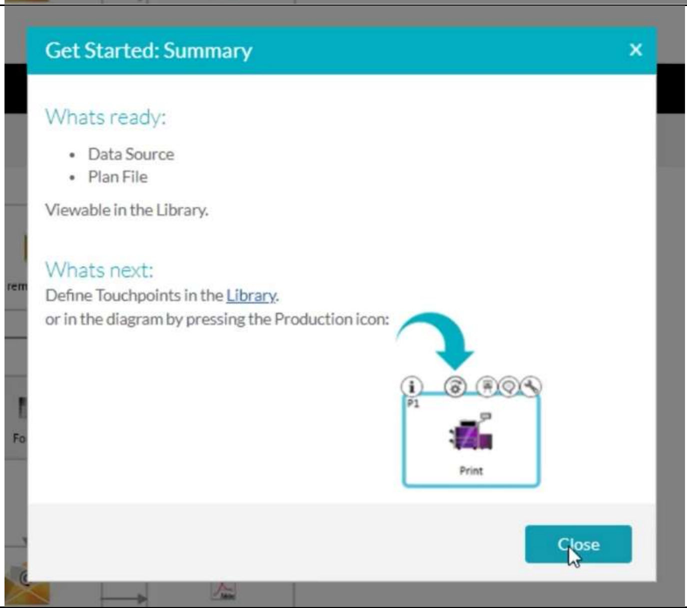
For this example, I will choose to use the firstname and lastname fields. Circle will automatically handle any duplicates by adding a random number at the end.

The recipient key is important when creating a campaign that will include a personalized website, since the recipient key will form part of the URL to uniquely identify the recipient that is accessing the site. It is also used for tracking the recipient's interaction with the campaign – even if there is no personalized website.



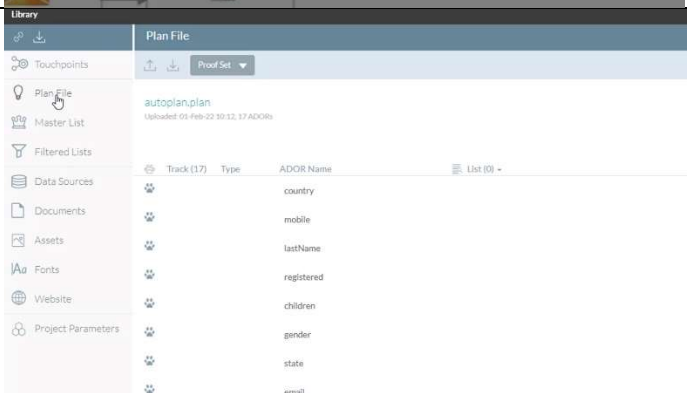
Circle has now automatically created a plan file, and uploaded it, and the data source to your uProduce server.

We can now go on to setting up the touchpoints either individually on each touchpoint, or via the library.



We will look at setting up touchpoints in later modules. For now, let's look in the library to see what the quick start has done for us.

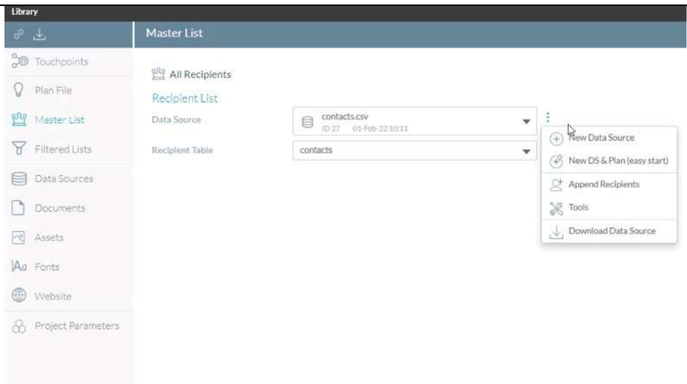
Firstly, in the Plan tab, you can see that the quick start has created a plan file automatically based on your data source. We can download the current plan here, and upload replacement plans with this icon. You may need to download the plan file to add additional rules or logic, or to change an ADOR type to Graphic if you want to dynamically change images in your documents.



On the Master List tab, you can see the table we uploaded. Again we can upload a replacement data source. There is an option to also recreate the plan in the event that the data schema is different to the original file. For example, if additional columns were added to the data.

We can download a copy of the data. For example, after the campaign, we can send the updated and newly captured information back to our client.

And the tools icon allows us to do important things like



adding additional recipients to the data source. If your campaign will use assets for variable graphic or text file ADORs, you can create a new assets folder and upload assets to your production server. And the same for fonts used in your print documents. We will look at Lists, Documents and Websites later in in this tutorial series.	