

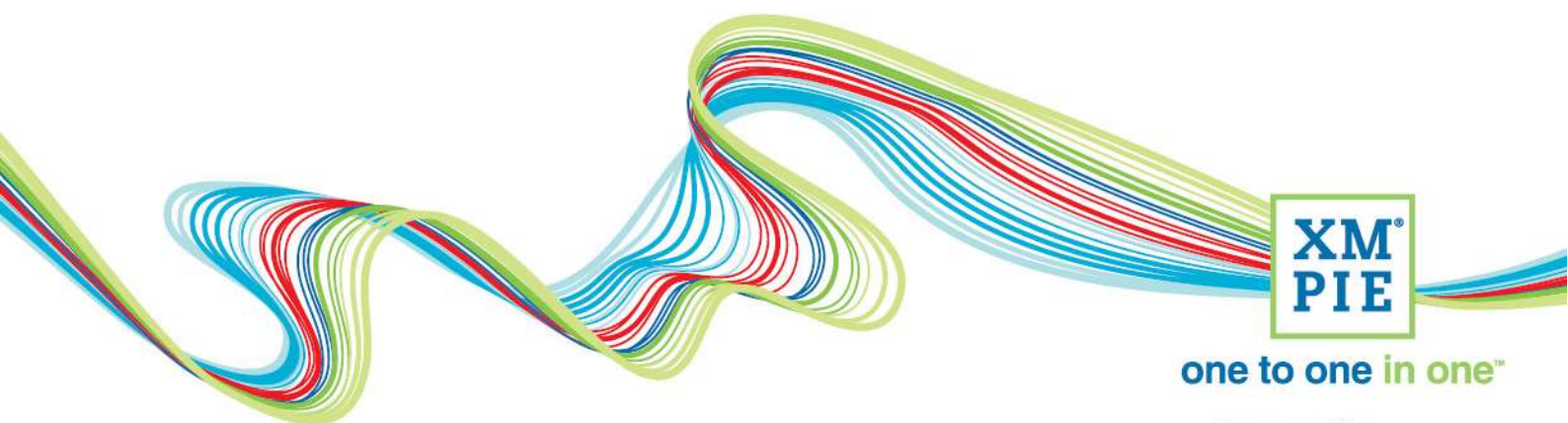
XMPie Sales Training Series

Transcript for: External Touchpoints Introduction

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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.

Thumbnail



In this video I will introduce the first phase of the new External Touchpoint in Circle.



Circle External Touchpoints
Introduction to Cross Media campaign integration

- Introducing the new External Touchpoint
- Plans for future functionality
- What is possible today

This feature is being introduced in 3 phases. First is an outbound trigger where an event on a cross media campaign web page can push out information to an external system – for example to send an SMS or to insert a record into an MIS or CRM system.

The second phase will be to batch process the trigger in Circle. This will come in future.

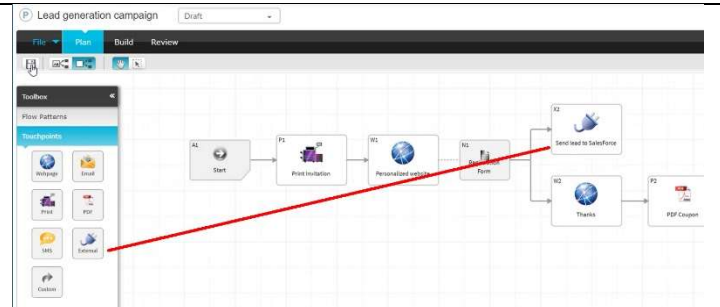
The third phase will be for an incoming trigger: Where another external system can push information into Circle to trigger an action or process to start. Again, this will be in future.

Three phases of development

- Phase 1 – Outbound trigger (Circle -> External system)
- Phase 2 – Bulk processing
- Phase 3 – Inbound trigger (External system -> Circle)

So, what is possible in this first phase of External Touchpoint?

You can bring one or more of the new touchpoints into your campaign flow diagram.



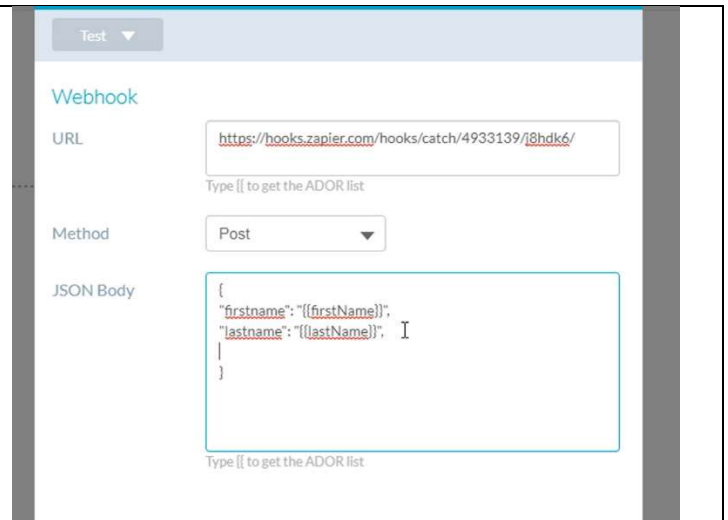
Once the project is saved and connected to your uProduce server, you can configure the production settings on the touchpoint.

A screenshot of the "X2 > Triggered" configuration window in XMPie. The window has a "Webhook" section with a "URL" field (with a note "Type || to get the ADOBE URL"), a "Method" dropdown menu set to "Post", and a "JSON Body" field (with a note "Type || to get the ADOBE URL"). A "Close" button is at the bottom right.

You can define the URL to send the data to when the trigger occurs.

Select either PUT or POST method.

And configure the JSON data to send to the URL. The data can include static text, or any of the ADOR values.



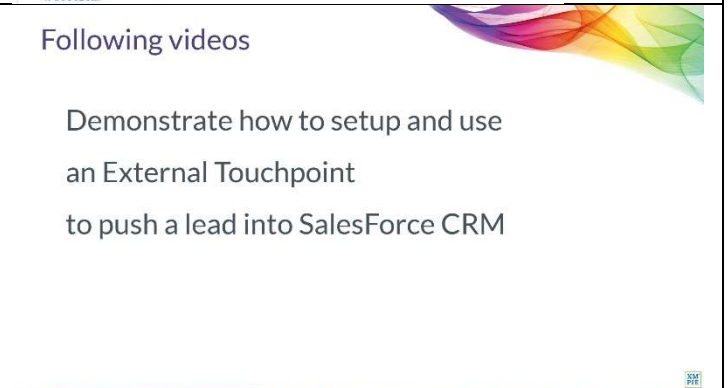
To trigger the External Touchpoint, on your Personalized Cross Media web page, add the xmp-success-trigger parameter and the touchpoint ID. This is identical to sending a triggered email. In fact, you can trigger the email and external touchpoint in the same trigger parameter. Because of this, the old xmp-success-triggered-email parameter will be deprecated.



The xmp-success-trigger parameter can be added onto the page load; form submit; button click and other page events.



In the following videos I will demonstrate how to setup an external trigger and push the recipient data into Salesforce as a lead.



The first video will show how to setup the External Touchpoint in Circle to work with Zapier – a 3rd party company that provides a web service to integrate with many applications including Salesforce.

The second video will show how to trigger the External Touchpoint from the personalized web page.

Following videos

- Setting up an External Touchpoint in Circle
 - Creating the trigger
 - Using Zapier to push a lead into Salesforce CRM
 - Creating the URL and JSON
 - Testing the Touchpoint setup
- Triggering the External Touchpoint in a cross media web page
 - Locating documentation and help
 - Adding the trigger parameter to a form submit button
 - Testing the lead ends up in Salesforce