

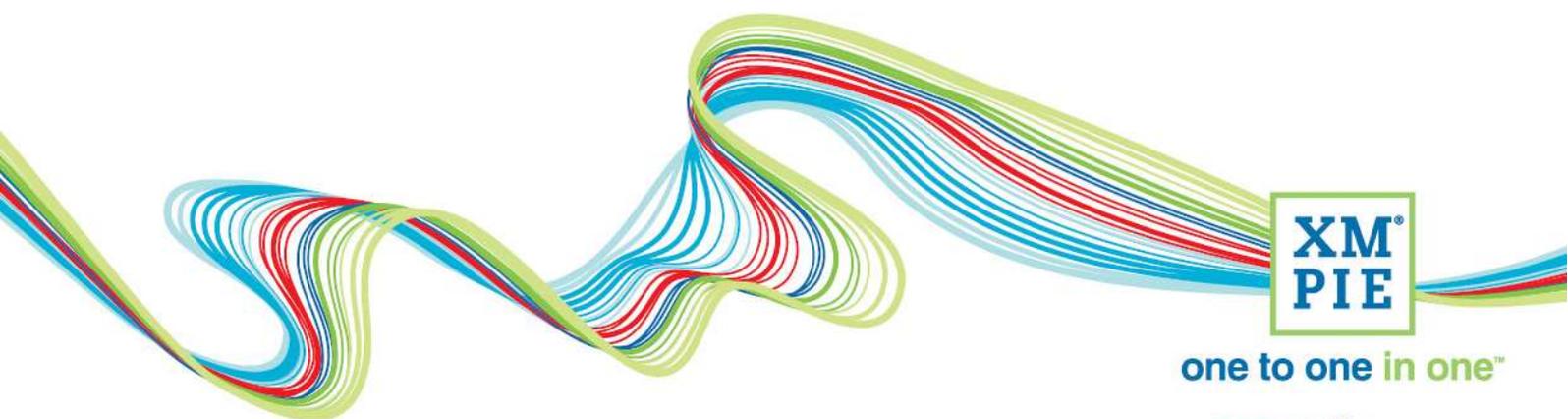
XMPie Campaigns on Demand

Transcript for: Campaign 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 look at how to setup the cross media campaign that was used in the introduction video.

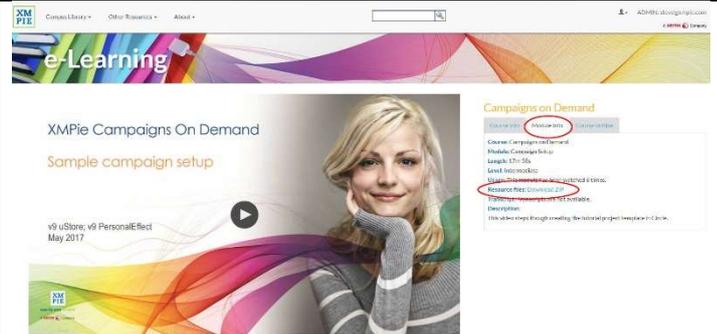
Thumbnail



There is a resources zip file you can download that contains all the files needed.

You will find it in the Module Info tab in Campus, or it will be provided to you if you are doing this with an XMPie trainer.

In a moment, I will show you how to take these files and setup the campaign.



In this video, I will not go into too much detail about the campaign setup.

If you're not so sure about Open XM, or something is not clear in this video, then you should refer to the Circle Tour Videos.

Campaigns On Demand

- Resources files for this sample
 - Download from the Module Info tab in Campus, or
 - Instructor handout
- Expected knowledge
 - Using Circle and Open XM to create a Cross Media campaign
 - Refer to Circle Tour videos or Campus for more information



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Before showing the setup steps, I will first talk about some things that you will need to bear in mind when creating a cross media campaign for use in uStore.

As always, it is best to start with a little planning – it will save you time in the long run.

For this sample, the first thing I needed to decide was what information do I want the customer to upload when buying the cross media product.

Planning

- What data fields need to be uploaded by the buyer?
 - These fields will be needed in plan recipient schema
 - Easiest to start with a sample data source of these fields



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The data fields that the customer will upload (or select) will define the primary schema of the campaign's plan file.

Planning

- What data fields need to be uploaded by the buyer?
 - These fields will be needed in plan recipient schema
 - Easiest to start with a sample data source of these fields
- What additional data needs to be captured?
 - Add extra fields to the data source for the capture



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In addition, also consider what the customer would want to download after the campaign is finished.

For example, any additional fields you will capture on the web pages – the RSVP or registration in this case.

ID	FName	LName	Email	Gender	City	Country	Mobile	Attending	Meal
1	Steve	Melloney	no-reply@xmpie.net	M	Forest Glade	South Africa	+27 21 421 4848		

Next, as you create your print, web and email designs, add additional ADOR objects for the customization steps.

Planning

- What data fields need to be uploaded by the buyer?
 - These fields will be needed in plan recipient schema
 - Easiest to start with a sample data source of these fields
- What additional data needs to be captured?
 - Add extra fields to the data source for the capture
- Add additional ADORs for customization

These are the ADORs that will change the design, and allow the customer to set values that are consistent for all recipients in the campaign "instance".

For example, the name of the bride and groom.

As always, remember that the uStore customization step replaces any logic in your ADORs.

Planning

- What data fields need to be uploaded by the buyer?
 - These fields will be needed in plan recipient schema
 - Easiest to start with a sample data source of these fields
- What additional data needs to be captured?
 - Add extra fields to the data source for the capture
- Add additional ADORs for customization
- Use variables if you need logic in uPlan expressions

So, if you need to use logic – for example, to format the event date and time – create a variable for the customer to update in uStore.

And, then use the variable in your ADOR logic and apply the formatting or logic here.

Last, remember to turn on the Campaign Dial setting on any ADOR objects or variables that you need the customer to modify on the customization step in uStore.

Planning

- What data fields need to be uploaded by the buyer?
 - These fields will be needed in plan recipient schema
 - Easiest to start with a sample data source of these fields
- What additional data needs to be captured?
 - Add extra fields to the data source for the capture
- Add additional ADORs for customization
- Use variables if you need logic in uPlan expressions
- Remember to turn on the "Campaign Dial" setting

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As you are working on your document designs, you may need to come back and make more changes to the plan.

With Open XM, you can download, edit and upload the plan. Or, I also find it useful to use the uCreate Print panel in InDesign to make changes to the plan file.

This is especially helpful while you are working on the print document, but can also be used to edit the plan while you are working on email or web pages too.

Adding ADORs / editing logic as you go

- uPlan, or
- uCreate Print

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OK. So, on to setup of the sample campaign.

Login to your Circle account and create a new project.

In the Plan tab, drag out a Print Touchpoint, three Email Touchpoints and a Web Touchpoint.

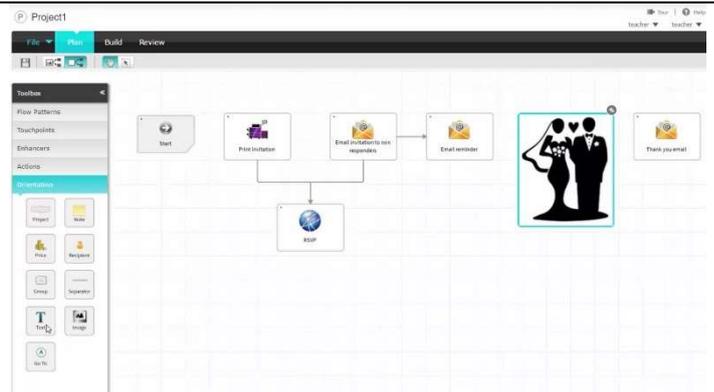
This is the basic flow of the wedding campaign.

There is a print invitation, an email invitation for those who haven't responded, an email reminder before the event, a thank you email sent to attendees after wedding and the personalized RSVP website.

If desired, you can link together the touchpoints to help the customer visualize the flow of the campaign.

You can add some more graphics and enhancers to improve the buyer's understanding of the campaign workflow, but it is not essential.

Save your project and enter a project name.

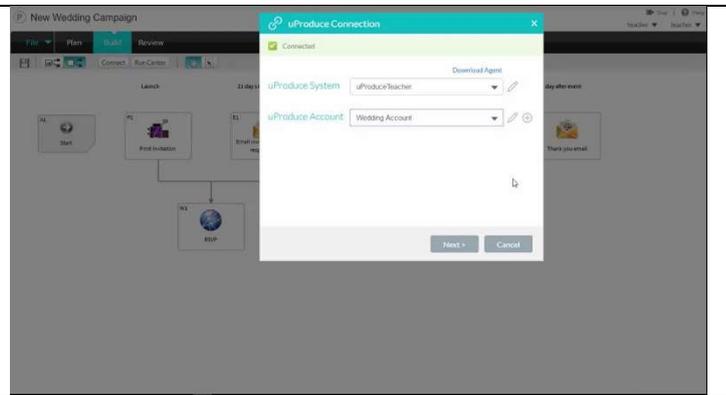


Now on the Build Tab, click connect.

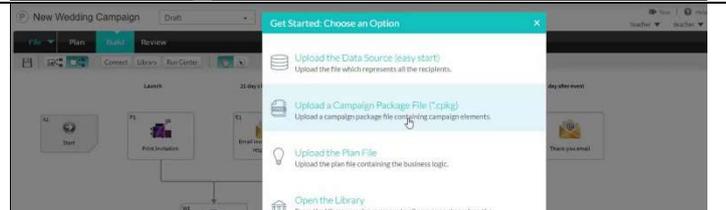
Select your uProduce server and either select an account, or create a new account.

If you are creating an account, make sure to select the correct XMPie Email Services account, and define your Physical Address.

These values will be used for the email footer.



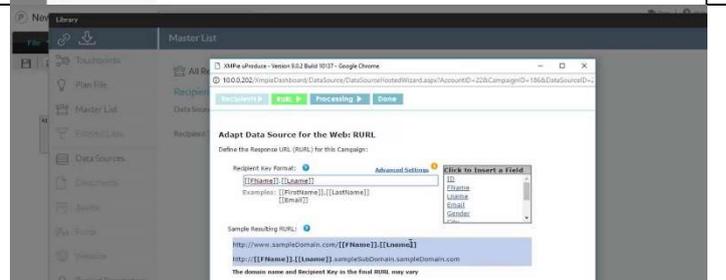
Now, select to upload a campaign package and upload the CPKG provided in the resources zip file.



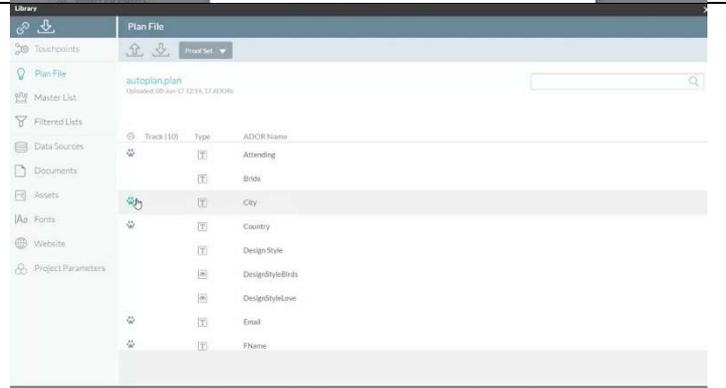
When the package uploads, select to adapt the data.



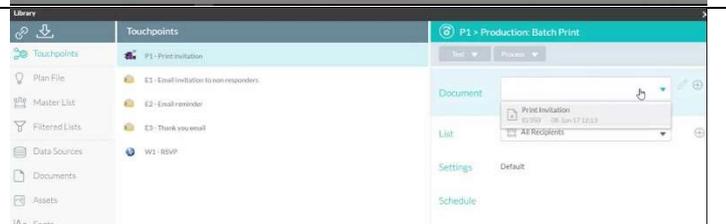
I will select to use the firstname and lastname as the recipient key.



In the Plan section, check that tracking is turned on for any ADOR objects that you need for reporting.

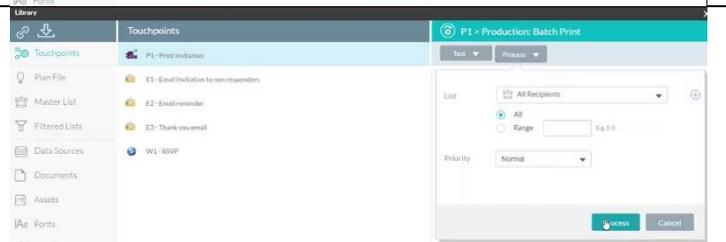


Now, on the Touchpoints section, select the Print Touchpoint, and link it to the XLIM document that was in the campaign package that we uploaded.

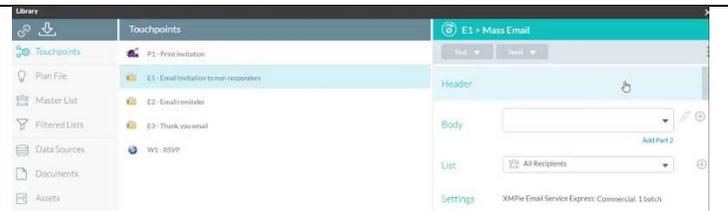


While here, let's process all the records so we can have some data in Marketing Console.

We will come back and setup the scheduling in a few minutes once we set all the Touchpoint documents.

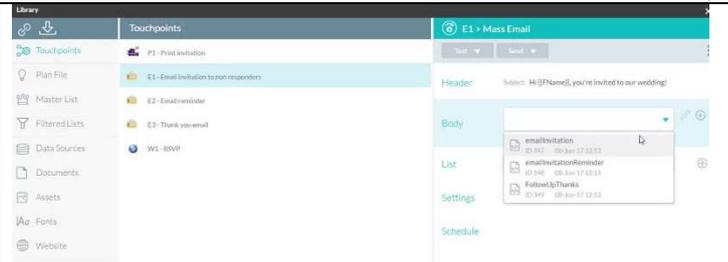


Select the email invitation Touchpoint. Define the email header and set the sender, recipient and subject.



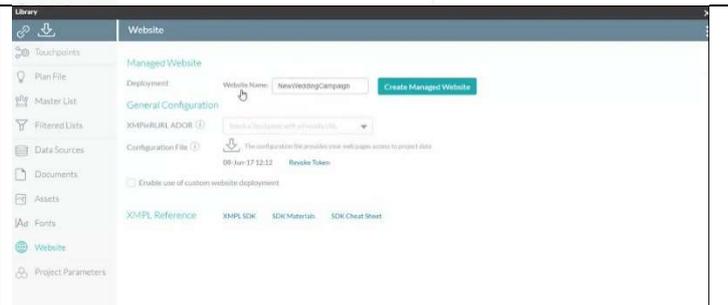
Set the body to be the email document that was in the uploaded campaign package.

Repeat the email setup for the reminder and thank you emails, but selecting the respective email document from the campaign package.

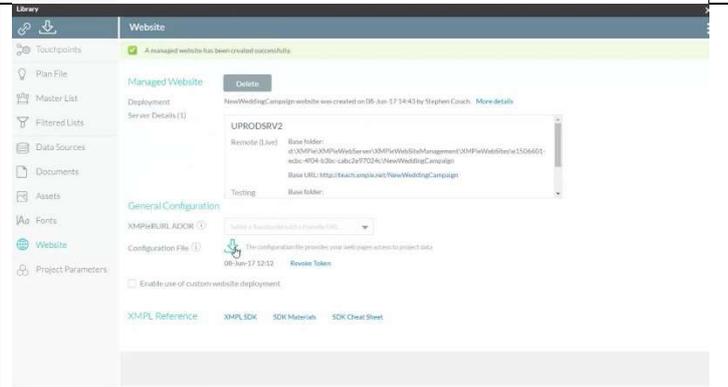


OK. Now go to the Website tab and select to create a managed website.

This name is OK, so go ahead and confirm that.

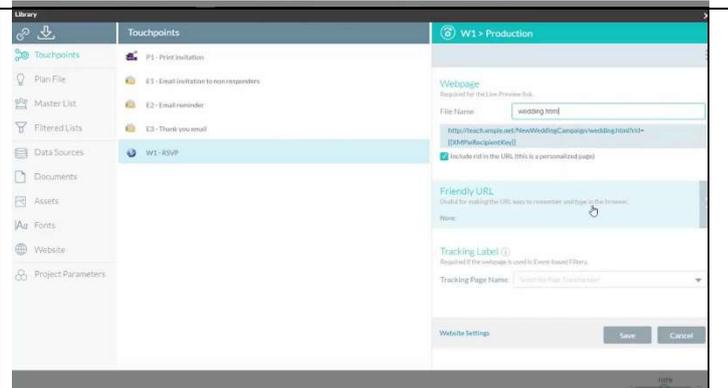


Download the xmpcfg.js file and save it into the website folder that you extracted from the resources zip.



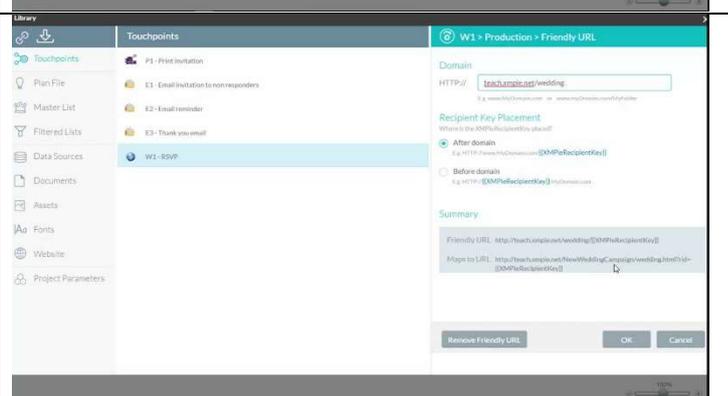
We will upload the web pages in just a moment, but while we are here in the Circle Library, we can set the page name on the Web Touchpoint.

If you look in the website folder of the resources zip, there are two pages. The RSVP page is wedding.html.

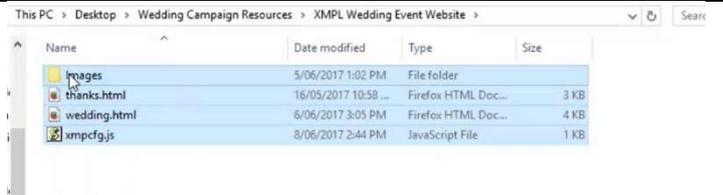


We can also set the Friendly URL for the campaign. My server hostname is teach.xmpie.net.

Since I also use this domain for other campaigns, I will add a folder to the URL. This area allows you to double check the redirection settings.

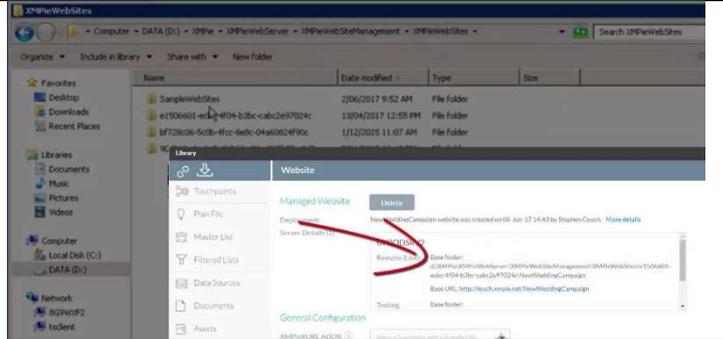


Now, to upload the web pages. You can use Dreamweaver and uCreate Digital or your favourite FTP application to upload the web pages to the website.



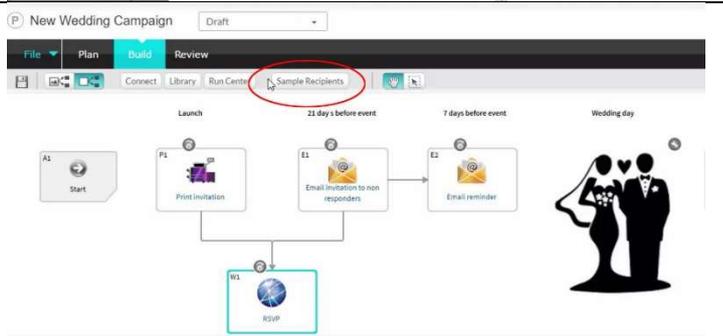
If you need to confirm the path, you can use the website section in the library to double check.

The provided webpages are already setup with the necessary tags.

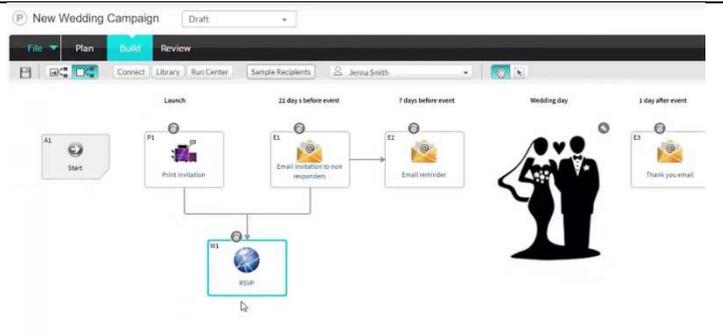


The next step is to setup some sample recipients. This will allow us to preview the Touchpoints in Circle to confirm everything is working.

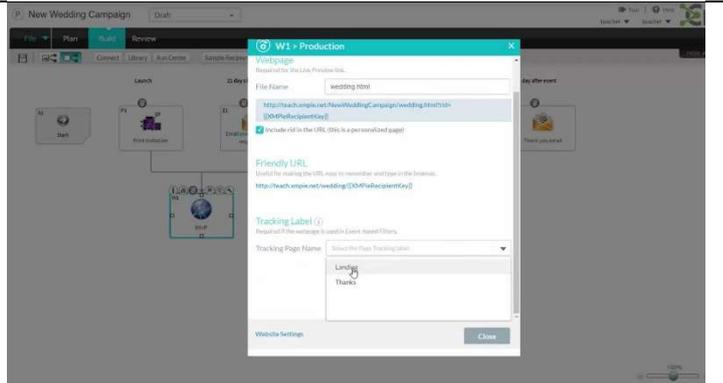
I will put the firstname and lastname to the top so we can select the sample recipients by name.



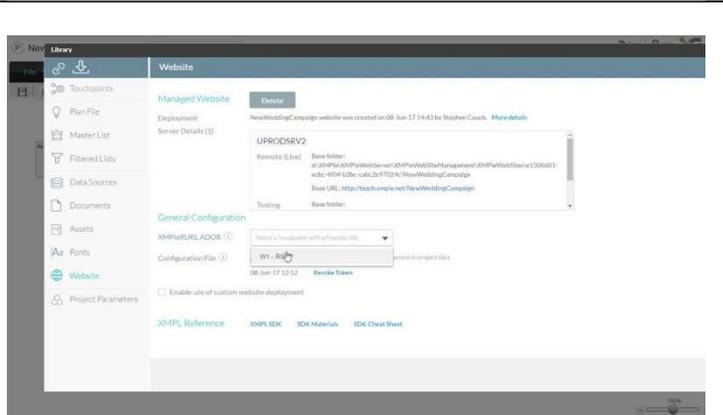
Now we can test each of the Touchpoints. I'll start with the web pages.



Once you have viewed the web pages, you can set the tracking page name on Touchpoint.



Oh, and I forgot to set the XMPie RURL ADOR on the website setup page. This setting tells Circle which Web Touchpoint should be used for the XMPie RURL.



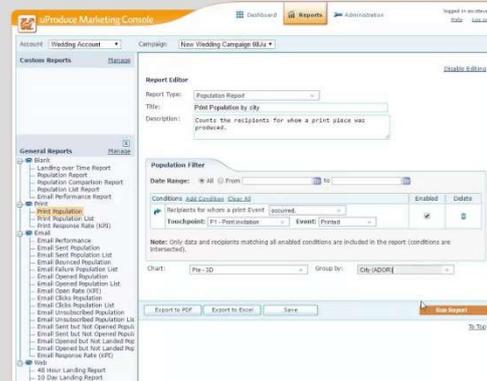
Now, when we check the print and email invitations, the Friendly URL will appear correctly and work as expected.



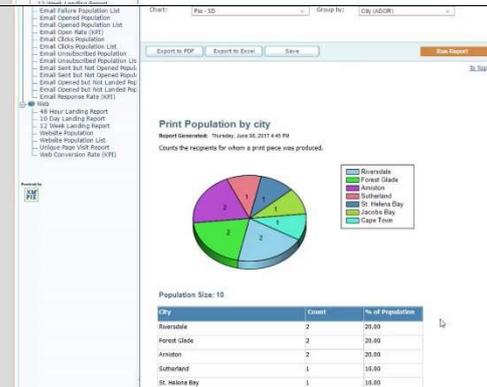
Next, it would be good to add some reports onto the project, so open up Marketing Console.



Create any reports that you would like. I'll do a Print Population first.



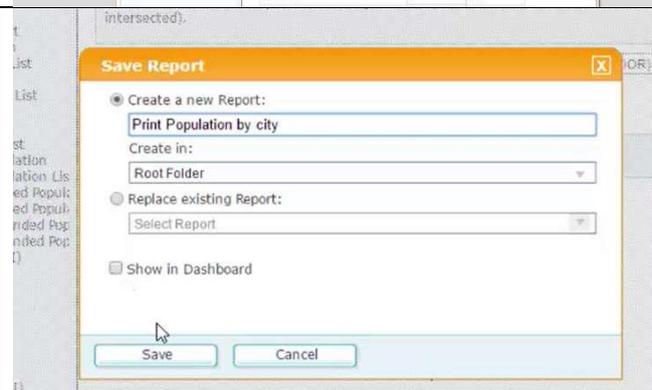
When you are happy with the report, save it as a custom report.



In the past you needed to add the report to the Marketing Console Dashboard, but from this version onwards, Circle looks for reports saved in the custom reports list.

I'll quickly create and save a website Landing report

Of course, you can create additional reports if desired.



Back in Circle we can now bind the reports to the most logical Touchpoint for customers to view.

OK, we're nearly done. Earlier, I skipped over the list filtering and scheduling setup on the Touchpoints because I first wanted to explain about Project Parameters.



We are going to add this campaign to uStore and allow customers to order a full cross media campaign for their own wedding, so we need a way to schedule the print and email production based on the date of the customer's event.

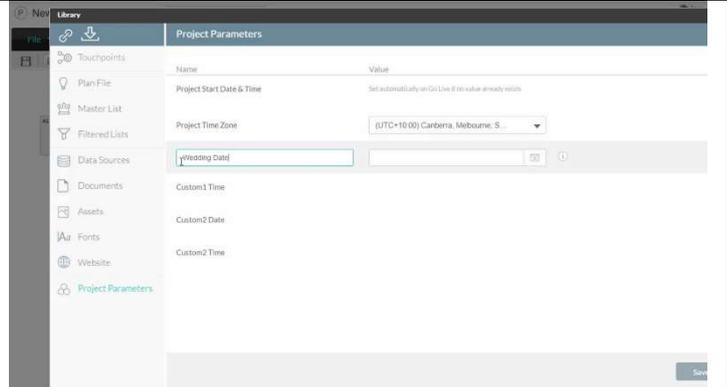
This is where Project Parameters come in.



For this campaign, I need to use two parameters – first the Project Start Date and Time, which is set automatically.

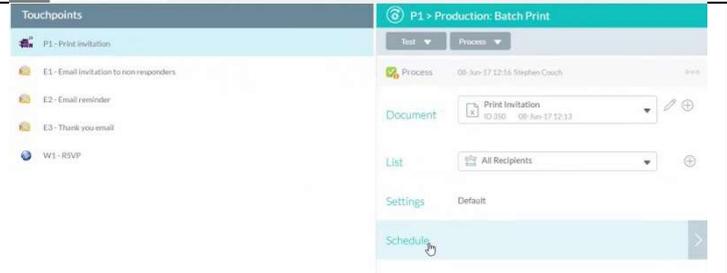
The second important date in this campaign is the date of the customer's wedding.

Circle provides for two custom date and time parameters, and for convenience, we can rename them.

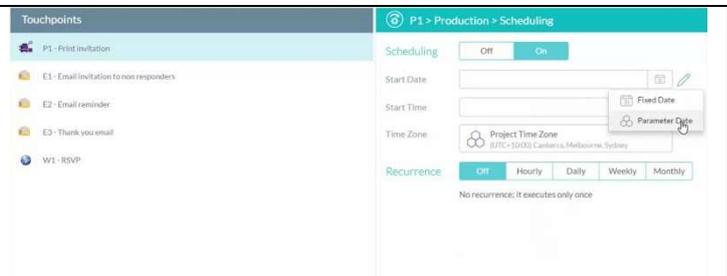


Now we can configure the Touchpoint scheduling based on these parameters.

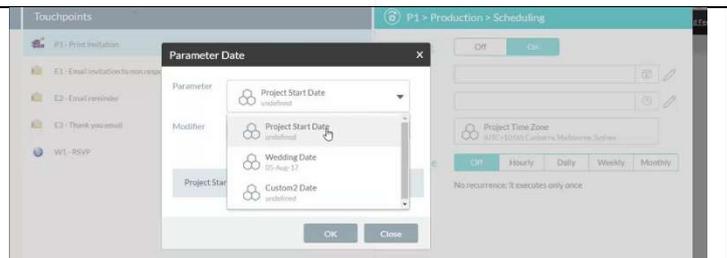
On the print invitation, go to and turn on scheduling.



Instead of setting a fixed date...use this icon to select Parameter Date.

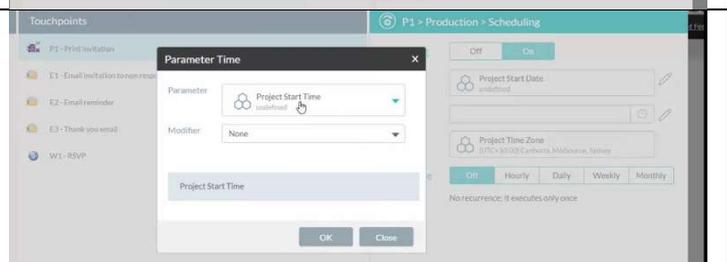


I'd like the print job to be processed as soon as the campaign is launched, so select Project Start Date.



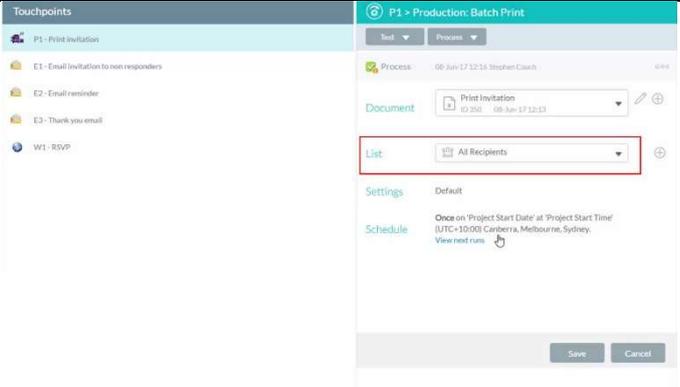
Repeat for the Project Start Time.

The Project Time Zone will also be set automatically by uStore based on the customer's browser timezone.

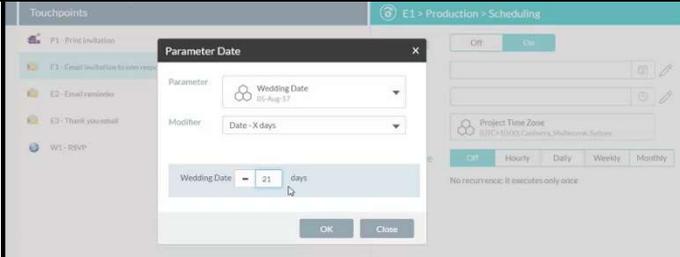


For the Print Touchpoint, we want to process all recipients.

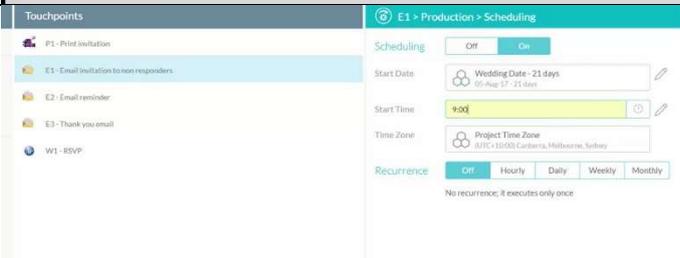
Now, for the email touchpoint. Oops – I should save first.



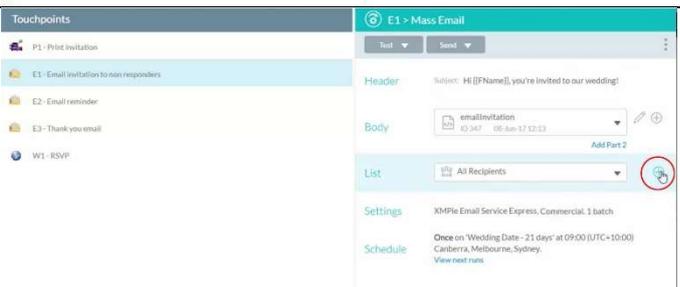
Turn scheduling on. For the email invitation, we want to send this 21 days before the wedding date, so select the wedding date parameter, and use the Modifier to set minus 21 days.



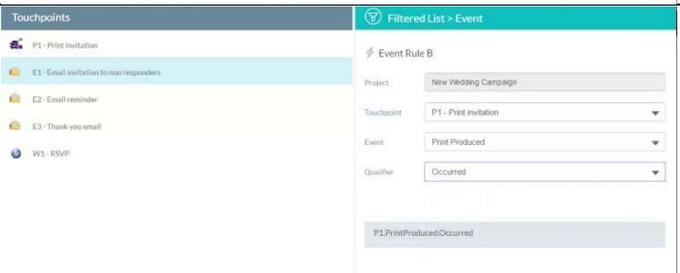
For the time, you can also use a parameter, but for simplicity, I'll set 9am.



For the list, I want to send the email invitation only to non responders.

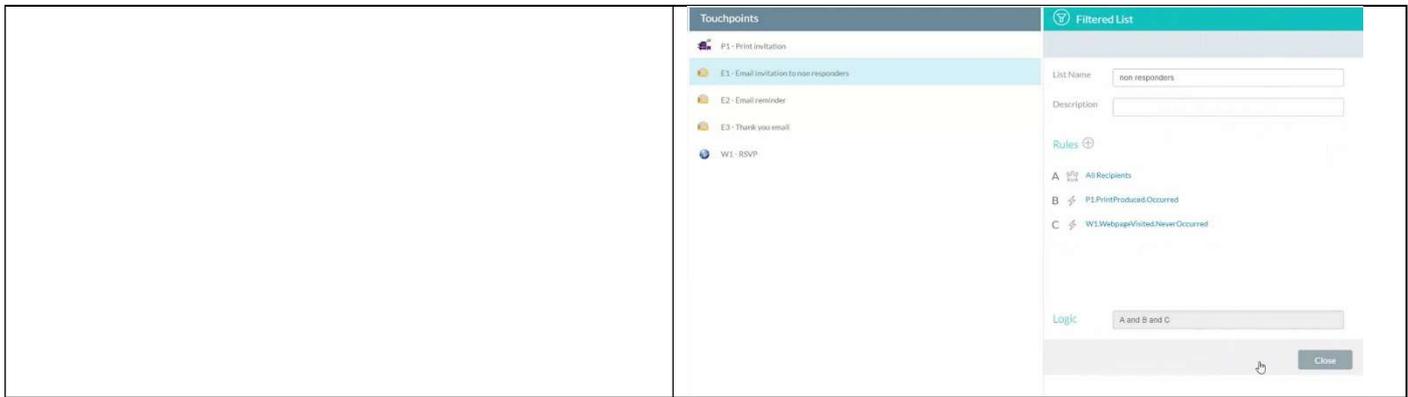


The first rule is to select recipients for whom we printed the print invitation Touchpoint.

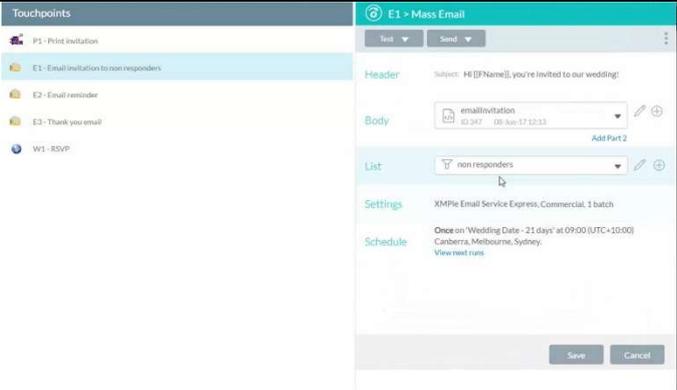


The next rule is to select recipients who have never visited the website.





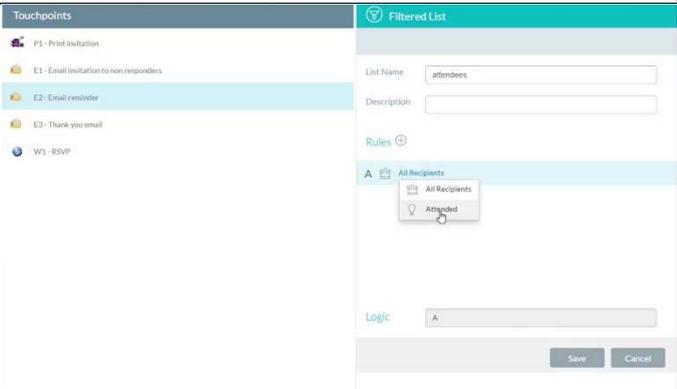
Our Touchpoint is now set to send the invitation email to non responders 21 days before the wedding date.



For the reminder email, we only want to send to recipients who have said that they will attend the event.

To make this selection, the Plan file includes a Filter to select these recipients.

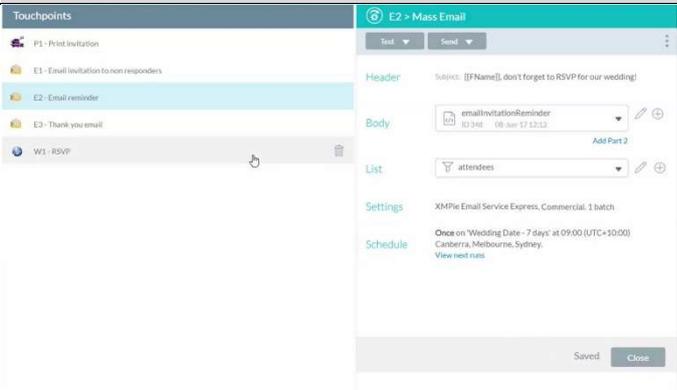
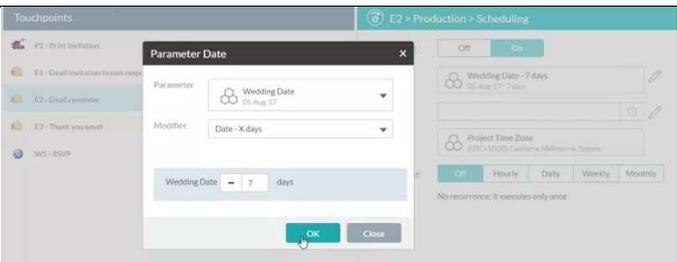
You can select the Plan Filter here.



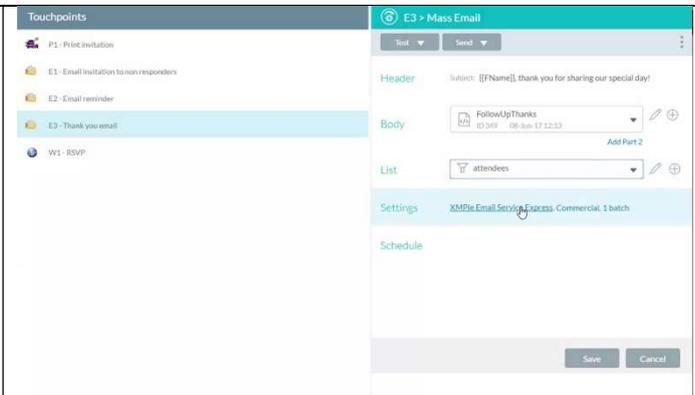
Again, we can turn the scheduling on, and use the wedding date Parameter.

And set the Modifier to minus 7 days.

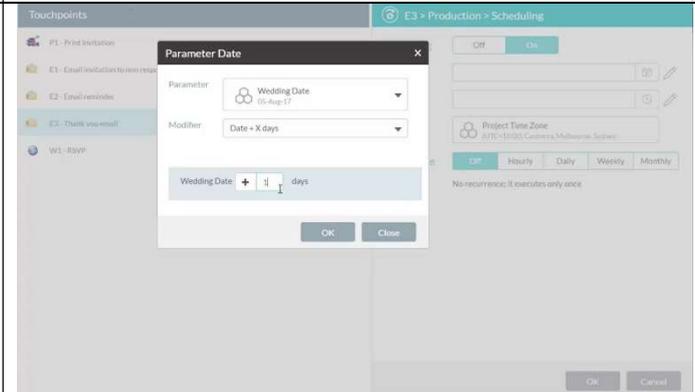
Oops – a Start Time is required...



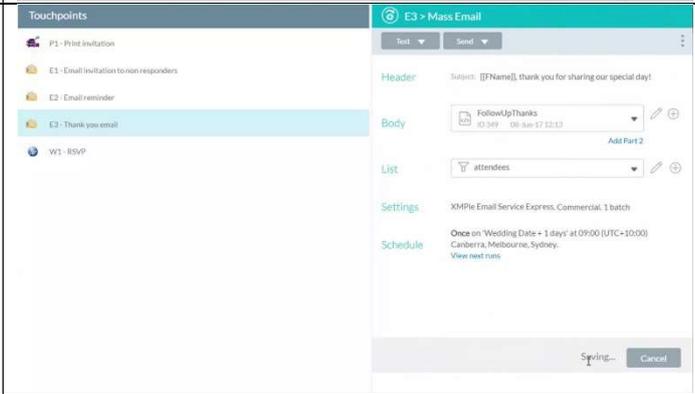
For the last “thank you” email, we can select the same list of attendees,



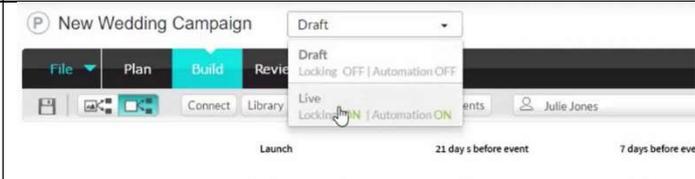
and set the scheduling to happen one day after the wedding date.



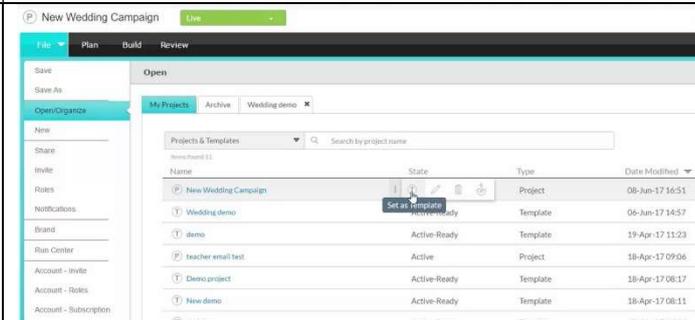
Now that we are done with the project setup, click Save. And then switch the Project to Live.



There is one last thing we need to do in Circle. From the File tab, select Open/Organize. On your new project notice this new icon.

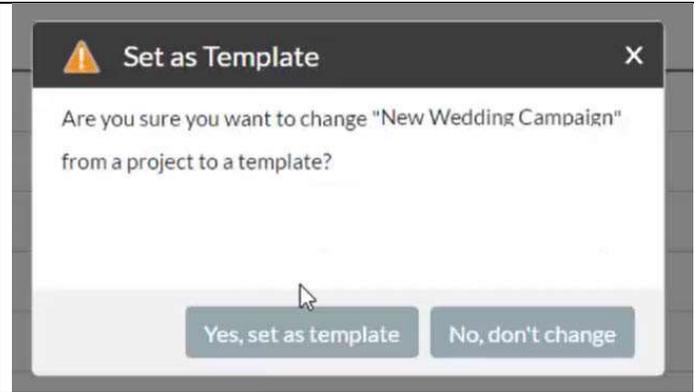


From the File tab, select Open/Organize. On your new project notice this new icon.



We need to click this to change from a Project to a Template.

Only when the Circle Project is set as a Template can it be duplicated to create separate Instances.



This "T" indicates that the Project is now a Template. And, the status has changed from Live to Ready.

In the next module, we create our store and add the cross media product.

