XMPie Campaigns on Demand

Transcript for: Campaign setup

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Software version: v9.1

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Notices

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Voice over script	Thumbnail
Hi. Welcome to XMPie. In this module, we look at	
how to setup the cross media campaign that was	XMPie Campaigns On Demand
used in the introduction video.	Sample campaign setup
	See 1
	10 UStars 10 BergandEffect
	May 2017
	XM
There is a resources zip file you can download that	Ymp Consultory - Abut Im Consultory - Abut Consut Consultory - Abut <t< th=""></t<>
contains all the files needed.	e-Learning
You will find it in the Module Info tab in Campus, or	XMPie Campaigns On Demand
it will be provided to you if you are doing this with an	Sample campaign setup
XMPie trainer.	V9 UStore; V9 Personalië fiest
In a moment, I will show you how to take these files	May 2017
and setup the campaign.	
In this video, I will not go into too much detail about	
the campaign setup.	Campaigns On Demand
	Resources files for this sample Download from the Madule Infection Computer of
If you're not so sure about Open XM, or something is not clear in this video, then you should refer to the	 Download from the Module Into Tab in Campus, or Instructor handout
Circle Tour Videos.	Expected knowledge Using Circle and Open XM to grapte a Cross Media comparian
	 Refer to Circle Tour videos or Campus for more information
	XM
	ent traces nore © 2000-2017 XMPre, A Xerox Company. All Rights Reserved. ▲ NTITE € Inner
Before showing the setup steps, I will first talk about	Planning
creating a cross media campaign for use in uStore.	 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
As always, it is best to start with a little planning – it	
win 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.	Example 2000-2017 XMPse & Xerry Commany All Boths Reserved Average Commany All Boths Reserved Average Commany All Boths Reserved
The data fields that the customer will upload (or	
	Planning
select) will define the primary schema of the	Planning
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
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 poods to be agent used?
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In addition, also consider what the customer would	El ♥>・
want to download after the campaign is finished.	K Cut Arial - 10 - A A = = = ⊗ - ⊗ Wap Test General - 10 - P
	Pate © Carrier B I U · · · · · · S · S · S · Conditional format as: Cell Cell · · S S
For example, any additional fields you will capture	2 * : × × k
on the web pages – the RSVP or registration in this	at A B C D E F G H I J K L 1 D FName Lname Email Gender City Country Mobile Attending Meal 2 1 Steve Mellorey notrophy@comple.net M Forest Glade South Africa +27 21 421 4348 C
case.	
Next, as you create your print, web and email	Planning
designs, add additional ADOR objects for the	
customization steps.	 What data fields need to be uploaded by the buyer?
	 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
	XM
	PLE ere to one 19 2000-2017 XMPie. A Xerrar Company. All Richts Reserved A serve € (new)
These are the ADORs that will change the design,	🔀 haafar (Balanda) ahaa / Balanda 🛛 🔛 haan 18 Jaya - Baland Okaba 🔹
and allow the customer to set values that are	Steve Melloney. Join us for
consistent for all recipients in the campaign	OUT and the set of the
"instance".	To be for the form of the form
	Bride & Groom
For example, the name of the bride and goom.	Heid Data Column
	Vietading Date vietading
	Royal Gardens
	120 Milliner Ave, Cape Jown
As always, remarker that the ufters systemization	
As always, remember that the ustore customization	Planning
step replaces any logic in your ADORS.	What data fields peed to be upleaded by the buyer?
	 What dota fields field to be oploaded by the boyers
	- These fields will be needed in plan recipient schema
	These fields will be needed in plan recipient schemaEasiest to start with a sample data source of these fields
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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
As you are working on your document designs, you may need to come back and make more changes to the plan.	 Adding ADORs / editing logic as you go uPlan, or uCreate Print
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.	© 2000-2017 XMPHe; A Xerox Company. All Rights Reserved.
OK. So, on to setup of the sample campaign.	Project Project Prov Duld Review
Login to your Circle account and create a new project.	Image: Contraction of the image into the image intothe image into the image into the image into the image int
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.	Project1 Plan Build Review Save As Save As
Save your project and enter a project name.	Open/Organize Name: New Welfding Campaign New Type: Project • Share Share Save Don't Save

Now on the Build Tab, click connect.	() New Wedding Camp	aign	2 uProduce Connection	× tree Q reve x tree Q reve
,	File * Plan Buil	et Fun Carraz	Connected	load Aerent
Select your uProduce server and either select an		Launch 23 day to 13	Produce System uProduce Yeacher	▼ // day after event
account, or create a new account.	. 0	4	Produce Account Westing Account	• / 0
		Port in-that in		Thankyou enail
If you are creating an account, make sure to select		101		lş.
the correct XMPie Email Services account. and define		6000 6000	Maxt >	Cancel
vour Physical Address.				
These values will be used for the email footer.				
Now select to unload a campaign package and	(P) New Wedding Cam	palgn Dnet •	set Started: Choose an Option	Briter Qreak
upload the CPKG provided in the resources zin file.	File Plant the	d Review	 Upload the Data Source (easy start) 	
		Lainth 21.00y-1	Upload the file which represents all the recipients.	day after north
	" O		Upload a Campaign Package File (*cpkg) Upload a campaign package file containing campaign elem	nents
	There -	Point Inclusion	Upload the Plan File Upload the plan file containing the business logic.	There you must
			Gpen the Library	
When the package uploads, select to adapt the data.	P Nov Library	Maderitie	In a room the Library Visi have access to all components such	a = 1 0 H
	H 20 Toucheolete	1 All Recipients		
	Plan File	Recipient List	- Gonitada	1.0
	T Finered Las	Recipierst Table	Lat b	•
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recipient key	and 2 Section	MasterList		
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	An error	Sample Resultin	g NUNL: 0	
	D. Source Day	http://[[FMa The dossin na	me]].[[Leanse]].sampleSubDornain.sampleDomain.com me and Recipient Key is the final RURL may vary	
In the Plan section, check that tracking is turned on	ee 소	Plan File		
for any ADOR objects that you need for reporting.	20 Touchpoints Plan File	1 Stratset		
	929 Master List	Uplanded: 00-Aur 17 12:14, 17 ADDRs.		
	Y Filtered Lists	Track(10) Type ADORNA	une .	
	Documents	T Bride		
	Assets Ad Fonts	€ CRy Ø (T) Country		
	Website	Design Sty	vie	
	-00 Project Parameters	Designofly	leBirds IeLove	
		₩ (T) FName		
Now, on the Touchneinte costion, select the Drive	Library			
Touchpoint, and link it to the VLIM document that	ළ 🕹 දීම Touchpoints	Touchpoints	© P1	> Production: Batch Print
was in the campaign package that we uploaded	Plan File	E1-Email invitation to non responders	Docume	nnt 🦣 🔹 🖉 🕀
was in the campaign package that we uploaded.	Master List	 E2-Ensil reminder E3-Thank you email 		Print Invitation (1) 1970 - 36 Jan (7 12) 3 El All Recipients
	Data Sources	W1-RSVP	Loft Settings	Default
	Documents		Schedule	en andresse
	iAa Fonts Library			
While here, let's process all the records so we can	P 🕹	Touchpoints	() P1	> Production: Batch Print
nave some data in Marketing Console.	Q Plan Elle	E1 - Email invitation to non responders		
	Master List	 E2-Enallreninder E3-Dauf 	List	All Recipients All Recipients
we will come back and setup the scheduling in a few	Data Sources	 E.P. FINING VOL BITTAR W1 - RSVP 	Priority	Normal V
minutes once we set all the Touchpoint documents.	Documents			nd.0245
	IAd Fonts			Lipscess Cancel
	() Website			

Select the email invitation Touchpoint. Define the	Ubrary 중 <u>문</u>	Touchpoints	(6) E1 > Mass Email
email header and set the sender, recipient and	C Touchpoints	P1-Printimitation	the weight weigh
subject.	Plan File	E1 - Enail Institution to non respondens	Header
	Filtered Lists	E3 - Thurk you small	Body 🗸 🖉
	Data Sources	WI-RSVP WI-RSVP	Add Part 2
	Documents		Cattines XMPle Email Service Extract Connectual (Datch
Cat the hady to be the small desument that was in	Lbrary		
Set the body to be the email document that was in	운 소 See Textenies	Touchpoints	E1 > Mass Email
the uploaded campaign package.	Q Plan File	P1 Proteinstation E1 - Email Invitation to non responders -	Hearder Start HillDanell warm with to an weblind
	1월 Master List	6 E2-Ematreminder	Langung
Repeat the email setup for the reminder and thank	Filtered Lists	E3 : Tlusik you emuä	Body Concernation R
you emails, but selecting the respective email	Documents	MT-ROM	List in the internation
document from the campaign package.	Assets		Settings
	IAa Fonts		Schedule
	Website		
OK. Now go to the Website tab and select to create a	e \$	Website	
managed website.	C Plan Ella	Managed Website	
	Master List	Deployment Website Name NewWebBingCampage Create Mar General Configuration	naged Website
This name is OK. so go ahead and confirm that.	Pitered Lists	XHIPHRURLADOR ()	
	Data Sources	Configuration File () . The configuration file ansides was set bases seen to prove (08-Jun 17 12:12 Result Token	fute -
	Documents	Enable use of custom website deployment	
	IAa Fonts	XMPL Reference XMPL SDK SDK Materials SDK Cheat Short	
	Website		
	Project Parameters		
Download the xmpcfg is file and save it into the	Library	Makain	
website folder that you extracted from the resources	Sterre Toochpoints	VYODSILE A managed wetwitte that been created soccessfully.	
website folder that you extracted from the resources	Q Plan File	Managed Withbilte Detete	
zip.	習 MasterList	Deployment NewWeddingCampaign website was created on 05-3an-17 14-43 b Server Deballs (1)	v Stephen Couch. More details
	Data Sources	Remote (Live) Base folder: d:SMPIeXSMPieWebServer/SMPIeWebServer/S	Management/XMP/eWobSRet/w1506601-
	Documents	ecto-4454-630o-cabc2e97024634eeWWeddli Daar URL: http://teach.org/ac.iee/NewWeddli	eCanovieri NgCarpaign
	Assets	Testing Basis folder: General Configuration	
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	🛞 Project Parameters	OB-Jun-17 12:12 Revola Tolan	
		Contraction and the second sec	
		COMULE NOTICE AMPLIAN AND REPORT AUX LINE AREA	
We will uplead the web pages in just a memory but	Library		>
we will upload the web pages in just a moment, but	상 소소 So Touchpoints	Touchpoints	W1> Production
while we are here in the Circle Library, we can set	Q Plan File	6 E1 - Email invitation to non-responders	Webpage
the page name on the Web Touchpoint.	Master List	6 E2-Email reminder	File Name woong trint
	Piltered Lists Data Sources	E3 E3-Thurk you enail W1-R5VP	Nttp://teschumpkinet/NewWeddingCampoign/wedding.html/htd= [[DMPW/RecipientKort]] [2] Johd PauliacipientKort]
If you look in the website folder of the resources zip,	Documents		
there are two pages. The RSVP page is wedding.html.	Assets		Claudi for valigative Office and to reveale and type in the homeant.
	Website		Tracking Label ①
	& Project Parameters		Readinal The sentence is used in Kneet Inneet Thera. Tracking Page Name Same Ha Page Institution
			Website Settings Save Cancel
			005
	Library		
we can also set the Friendly URL for the campaign.	P 🕹	Touchpoints	() W1 > Production > Friendly URL
My server hostname is teach.xmpie.net.	Plan File	P1 - Print Invitation E1 - Envillentitation to non-nesponders	Domain HTTP:// texthumple.ngt/wedding
	Master List	62-Email reminder	Example of the second s
Since I also use this domain for other campaigns, I	Filtered Lists	 E3-Think you email Wr. Boxe 	When In the XMPs Recipient Key ducan After domain E.g. HTTP://www.thy.Commission.(XMPerFectpientKey)
will add a folder to the URL. This area allows you to	Decuments	■ #4: 8207.	Before domain Eg HTTP: ((XMPleBecipientKey)) Inscrementer
double check the redirection settings	Assets		Summary
	Ag Fonts		Friendy URL: http://tech.org/e.set/worlding/[D04PleRecipienKey]]
	Website		Maps to URL: http://teachampin.net/NewWeddingCampsignweedding.html%id- []XMPinRecipientKey]]]]]
			Remove Friendly URL OK Canzel



Now, when we check the print and email invitations,	10.00 10.00 11.00		
the Friendly URL will appear correctly and work as expected.	RECEPTION CEREMONY DINNER		
	http://teach.xmpie.net/wedding/Jenna.Smith		
Next, it would be good to add some reports onto the			
project, so open up Marketing Console.	UProduce Marketing Console Login User Name: steve Password:		
Create any reports that you would like. I'll do a Print	Structures Matrixetures Controls		
Population first.	Available Contrast None White None State Contrast Reserve Reserve Reserve		
When you are happy with the report, save it as a	- 4 Nor Ladia Part - 1 All Control Contro Control Control Control Control Control Con		
custom report.	 The state of the s		
In the past you needed to add the report to the	t intersected).		
Marketing Console Dashboard, but from this version onwards, Circle looks for reports saved in the custom reports list.	List Save Report X 10R) List © Create a new Report: Print Population by city st. Create in: lation Beet Felder		
I'll quickly create and save a website Landing report	ed Popul: ed Popul: Inded Pop Inded Pop		
Of course, you can create additional reports if desired.	Show in Dashboard		
Back in Circle we can now bind the reports to the most logical Touchpoint for customers to view.	P New Wedding Campaign Dot Por Po		
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.	Project Parameters Image: Constraint of the second sec	Alua er asmatskip er Gil bet fresstær skredy verkis (UTC+100) Garberra, Melboane: S .
For this campaign, Theed 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.	Austral A	Volke Bit adamatikaly ve Gol Une if vis unha arready villin (UTG+18/00) Gardiarrea, Melbourne; S
Circle provides for two custom date and time parameters, and for convenience, we can rename them.	Website Website Project Parameters	See
Now we can configure the Touchpoint scheduling based on these parameters. On the print invitation, go to and turn on scheduling.	 P1-Prior invitation E1-Email invitation to non-responders E2-Email resolution E3-Thank you email W1-RSVP 	P1> Production Batch Print Text Process Process Process Print Instation Document Print Instation Document Print Instation Document Print Instation O Settings Default Schedulg
Instead of setting a fixed dateuse this icon to select Parameter Date.	Touchpoints Image: Pit-Print Induston Image: Pit-Print Induston Image: Pit-Print Induston For responders Image: Pit-Print Piter Piter Image: Piter Image: Piter	Image: Scheduling Scheduling Start Date Start Date Start Date Start Time Time Zone Project Time Zone Pr
I'd like the print job to be processed as soon as the campaign is launched, so select Project Start Date.	TouchpointS	(c) P1 > Production > Scheduling etc. (c) (c) (c) (c) (c) Project Time Zone (c) Project Time Zone (c) (c) (c) (c) (c)
Repeat for the Project Start Time. The Project Time Zone will also be set automatically by uStore based on the customer's browser timezone.	Touchpoints If I final invitation tensors If I final invitetee If I final invitation tens	P Production > Scheduling Or Or

For the Print Touchpoint, we want to process all	Touchpoints	P1 > Production: Batch Print
	P1 - Pvint invitation	Test 💌 Process 💌
recipients.	6 E1 - Ensell Invitation to non responders	Process 08-Jun-17 12:16 Strepter Couch 000
	62 - Envail reminder	Print Invitation
Now, for the email touchpoint, Oops – I should save	🙆 E3 - Thank you email	Document CD 10 250 00-3m-17-12:13
first	W1-RSVP	List III All Recipients
ilist.		Cottinge Defect
		Over on 'Project Start Date' at 'Project Start Time'
		Schedule (UTC+10:00) Carberra. Melbourne, Sydney. View next runs
		Save Cancel
Turn scheduling on. For the email invitation, we want	Touchpoints	E1 > Production > Scheduling
to cond this 21 days before the worlding date so	P1-Print Invitation Parameter Date	×
to send this 21 days before the wedding date, so	E3 - Enul invitation to non-resp	
select the wedding date parameter, and use the	E2-Emeil reminder Wedding Date D5-Aug-17	•
Modifier to set minus 21 days.	E3-Thurk you must Modifier Date - X days	Project Time Zone UNIC+ t0/02: Caubiens, Mathematic Setting
	WI-RSVP	e Dat Hourty Daily Weekly Monthly
	Wedding Date – 21 dwys	No recurrence: it executes only once
	ОК	Close
For the time, you can also use a parameter, but for	Touchpoints	E1 > Production > Scheduling dee
simplicity. I'll set 9am.	P1-Print invitation	Scheduling Off On
	E3 Enail invitation to non responders	Start Date Wedding Date - 21 days
	E3-Thank you email	Start Time 9:00
	W1-RSVP	Time Zone Project Time Zone (U)C+10/00 Carberca, Mellhourne, Sedney
		Recurrence Off Hourly Daily Weekly Monthly
		No recurrence; it executes only once
	Touchonints	🛞 E1 > Mass Email
For the list, I want to send the email invitation only	P1-Print Invitation	Test V Send V
to non responders.	E1 - Email Invitation to non responders	
	🙆 E2 - Email i reminder	Header antikor: Hillbuaruet/ you're invited to onr wedding:
	💼 E3 - Thank you email	Body emailinvitation • 2014/07-00-http:// 12/13
	W1-RSVP	Add Part 2
		Settings XMPIe Email Service Express, Commercial. 1 batch
		Once on 'Wedding Date - 21 days' at 09:00 (UTC+10:00) Schedule Canberra, Melbourne, Sydney. View next runs
The first rule is to select recipients for whom we	Touchpoints	(🗑 Filtered List > Event
printed the print invitation Touchpoint.	P1- Print institution	∲ Event Rule B
	E1 - Email reminder	Project New Wedding Campaign
	E3 - Thank you email	Touchpoint P1 - Print invitation 💌
	W1-BSVP	Event Print Produced
		Qualifier Occurred
		P1.PrintProduced.Occurred
The next rule is to select recipients who have never	Touchpoints	Filtered List > Event
visited the website.	P1 - Print lovitation	∲ Event Rule C
	E1 - Email limitation to non responders	Project New Wedding Campaign
	E2-Email:reminder	Touchpoint W1 - RSVP 💌
	La - Thank you email	Event Webpage Visited 👻
		Ousliner Never Occurred
		W1.WebpageVisited.NeverOccurred



For the last "thank you" email, we can select the	Touchpoints	E3 > Mass Email
nor the last shank you sending the can beleet the	P1 - Print invitation	Test 💌 Send 💌
same list of attendees,	E1 - Email Invitation to non responders.	Header Solver: [[FName]], thank you for sharing our special day!
	E2 - Email reminder	
	iii E3 - Thank you email	Body FollowUpThanks
	W1-RSVP	Add Part 2
		List 🛛 🖓 attendees 💌 🖉 🕀
		Settings XMPie Email Service, Express. Commercial. 1 batch
		0
		Schedule
		Save Cancel
and set the scheduling to happen one day after the	Touchpoints	E3 > Production > Scheduling
wedding date.	Parameter Date	X Off Ox
	Parameter O Wedding Date	
	E2 E2-Lmailrenindes O5-Aug-17	•
	Car Ca-Therit vou email Modifier Date + X days	Project Time Zone #/1C+10/02 Catherra Malbouriti Settine
	O W1-RSVP	e Dit Hourly Daily Weekly Monthly
	Wedding Date + 1 days	No recurrence: It executes only ence
	ок:	Close
		OK Canad
	Touchpoints	3 > Mass Email
	P1 - Print invitation	Test 🔻 Sund 💌
	E1 - Email invitation to non responders	Header Sugject: [[FName]], thank you for sharing our special day!
	E2 Email reminder	
	62 E3 - Thank you email	Body FollowOpinanks
	W1 - RSVP	
		List g attendees v V 🕀
		Settings XMPIe Email Service Express, Commercial, 1 batch
		Once on 'Wedding Date + 1 days' at 09:00 (UTC+10:00) Schedule Canberra, Melbourne, Sydney.
		View next runs
		Spring. Carrel
Now that we are done with the project setup, click	P New Wedding Campaign	
Source And then switch the Droject to Live	Draft	
Save. And then switch the Project to Live.	File V Plan Build Revie Locking OF	F Automation OFF
	P Connect Library Live	ents & Julie Jones
	Locking	Automation ON
	Launch	21 day s before event 7 days before eve
There is and lest thing we need to do in Circle	P New Welding Campaign	
There is one last thing we need to do in Circle.	File 2 Plan Buld Review	teach
	Save Onen	
From the File tab, select Open/Organize, On your	Save As	
now project notice this new icen	Open/Organize My Projects Archive Wedding demo X	
new project notice this new icon.	Projects & Templates V. Q. Search to Share	y project name
	Invite Name	State Type Date Modified 👻
	Roles (P) New Wedding Campaign	Project 08-Jun-1716/51
	Brand (T) demo	Active-Ready Template 06-Jun-1714:57
	Run Center	Active Project 18-Apr-1709:06
	Account - Invite Account - Invite ① Demo project Account - Roles	Active-Ready Template 18-Apr-1708:17
	Account - Subscription	Active-Ready Template 18-Apr-1708:11
	Mining Mining	Analise Davids Translater 40 Aug 40 Aug

We need to click this to change from a Project to a Template.	🛕 Set as Template X
Only when the Circle Project is set as a Template can it be duplicated to create separate Instances.	Are you sure you want to change "New Wedding Campaign" from a project to a template? Yes, set as template No, don't change
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.	T New Wedding Campaign Ready File Plan Build Review Image: State of the st