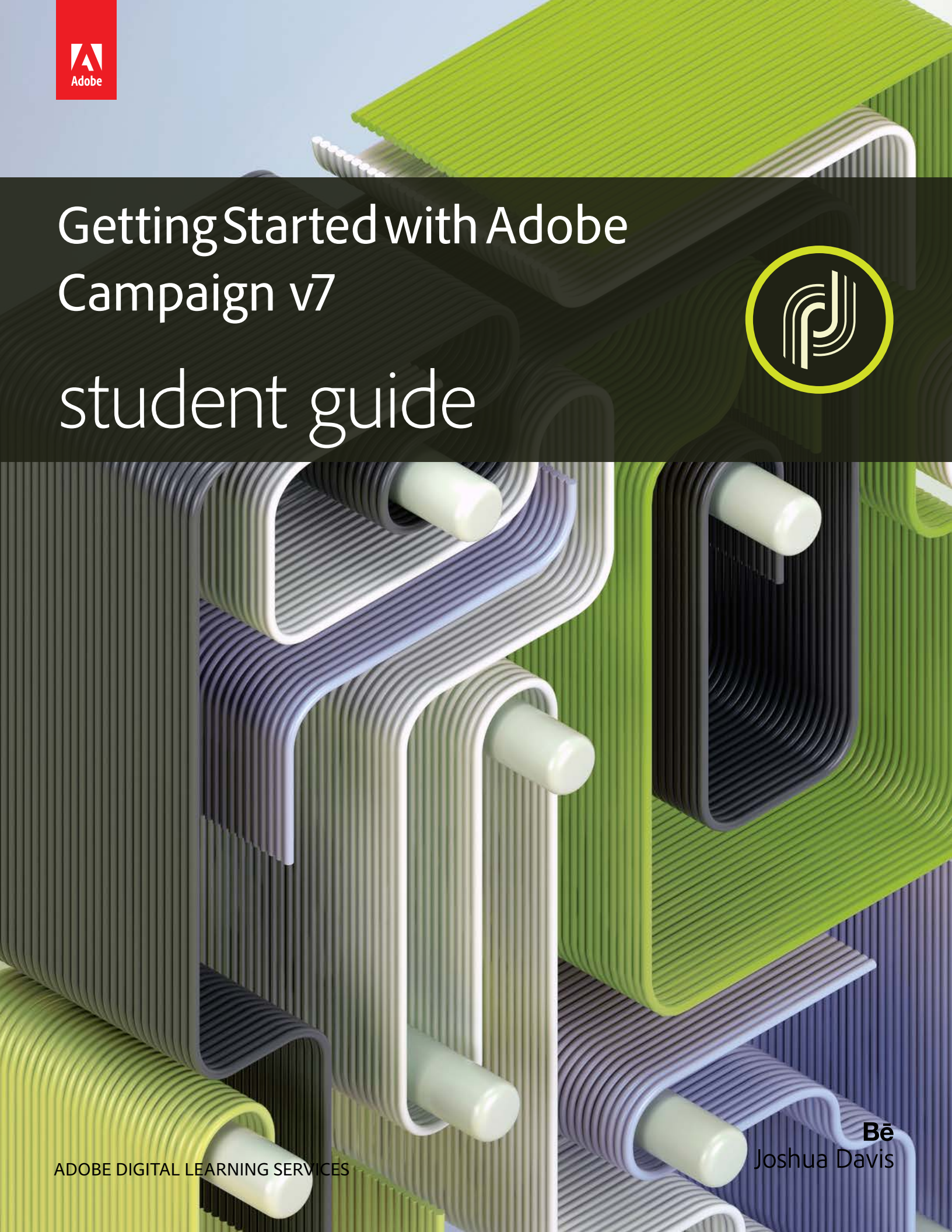
Getting Started with Adobe Campaign v7

student guide



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Getting Started with Adobe Campaign v7

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Chapter One

Introduction to Adobe Campaign v7

Objectives

By the end of this chapter, you will be able to:

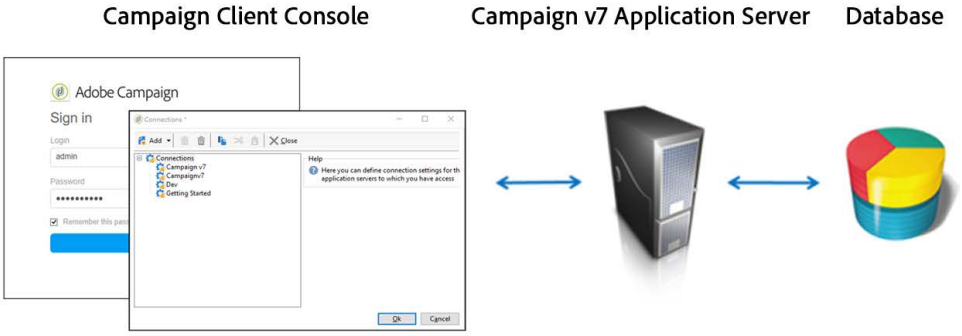
- Explain the Adobe Campaign v7 architecture
- Log on to the Adobe Campaign v7 client
- Explain the elements in the Adobe Campaign v7 UI
- Explain the features of Adobe Campaign v7

Adobe Campaign v7 Architecture

Adobe Campaign v7 is a multi-tier application that consists of:

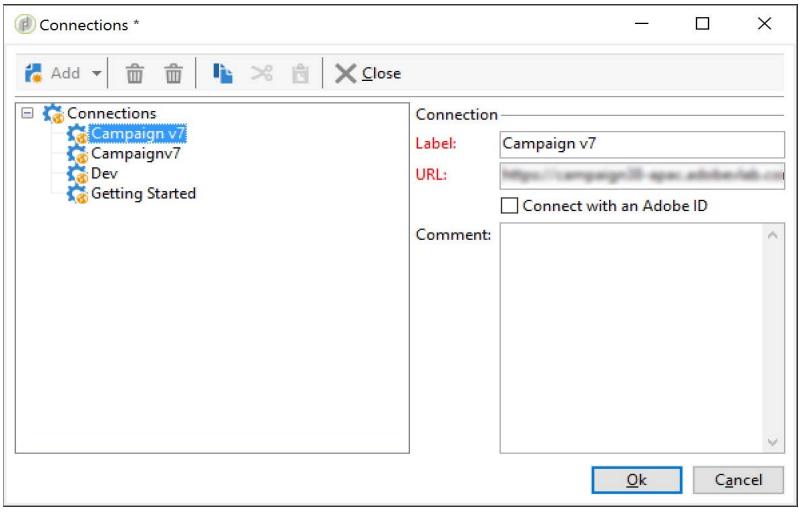
- Lightweight client
- Application server
- Database

To access Adobe Campaign, you must use the Adobe Campaign Client Console.



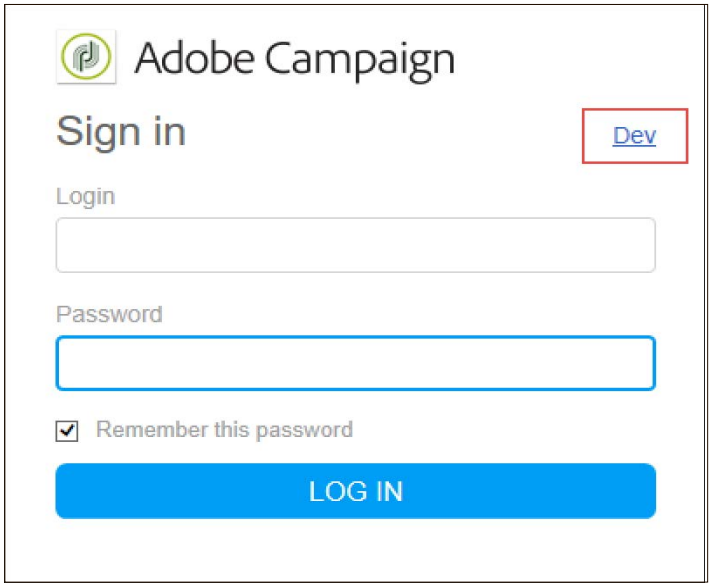
When you access Adobe Campaign through the Adobe Campaign Client Console, you use Application Programming Interfaces (APIs) to connect to the Application Server. The Application Server executes the workflows, and renders the dynamic content of your delivery. The Application Server communicates to the database, which contains your data mart, Adobe Campaign configurations, and system tables. Within Adobe Campaign, the data and resources are configured with schemas, which drive the database structure.

Within your Adobe Campaign Client Console, you can create and manage your connections to multiple environments, such as training, development, and production. You can connect to multiple environments by opening multiple sessions of the client.

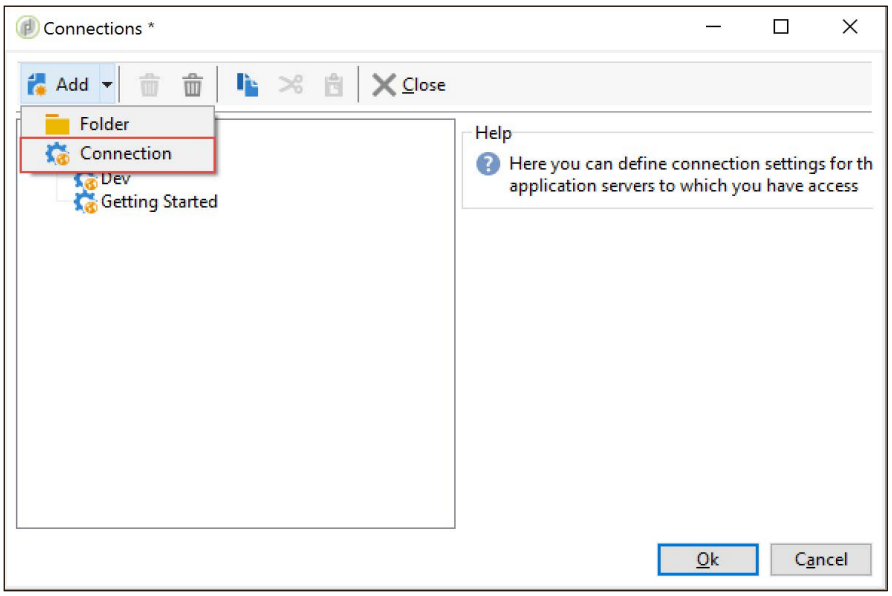


Exercise 1 – Log on to Adobe Campaign v7 client

1. On the Start menu, go to **Adobe Campaign v7** and click **Adobe Campaign Client Console**. Do not click **LOG IN**.
2. Click the link in the upper-right corner of the console as shown. The **Connections** dialog box opens.



3. In the **Connections** dialog box, click **Add** and select **Connection** from the drop-down menu as shown:

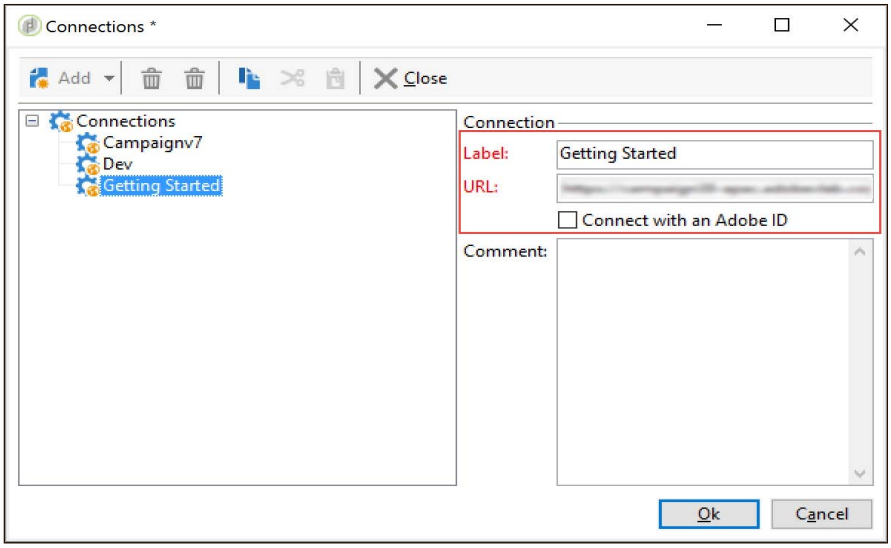


4. A **New** connection is added to **Connections.**

5. In the **Connections** dialog box:
   a. In the **Label** field, enter a connection name of your choice. In this exercise, we will enter **Getting Started**.
   b. In the **URL** field, enter the server URL. Use the exact server address your instructor provided prior to the training.

   The server URL must follow this format: https://campaign###-region.adobevlab.com.

   Your connection settings should look similar to the one shown:

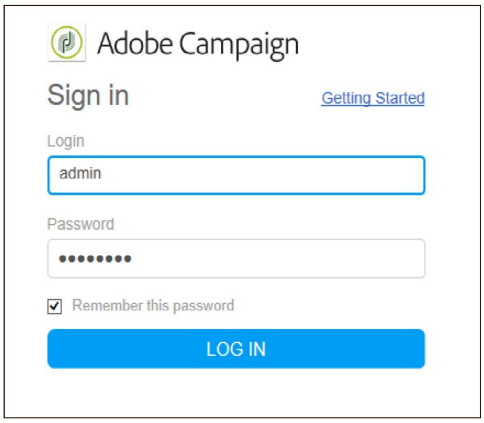


6. Click **Ok**. The connection you just defined should be selected.

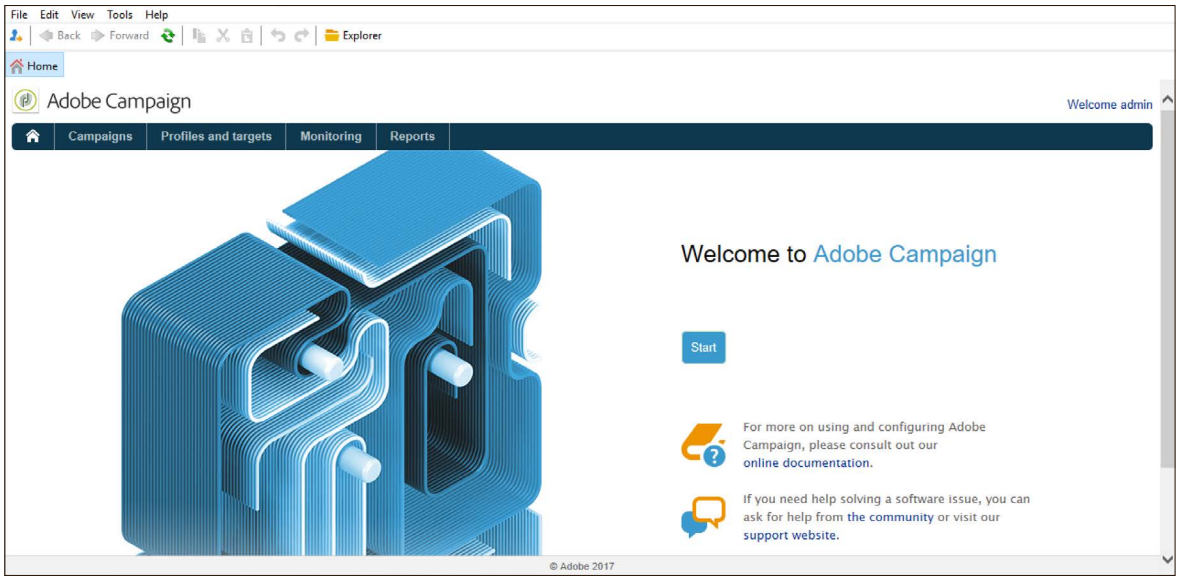
7. Enter your credentials.

TIP: Log on using the credentials your instructor provided. The credentials are case-sensitive.

You can select the **Remember this password** checkbox. However, when this option is selected, ensure no one else has access to your computer.



8. Click **LOG IN**. A confirmation dialog box is displayed.
9. Click **No**.
10. You have logged on to Adobe Campaign successfully.

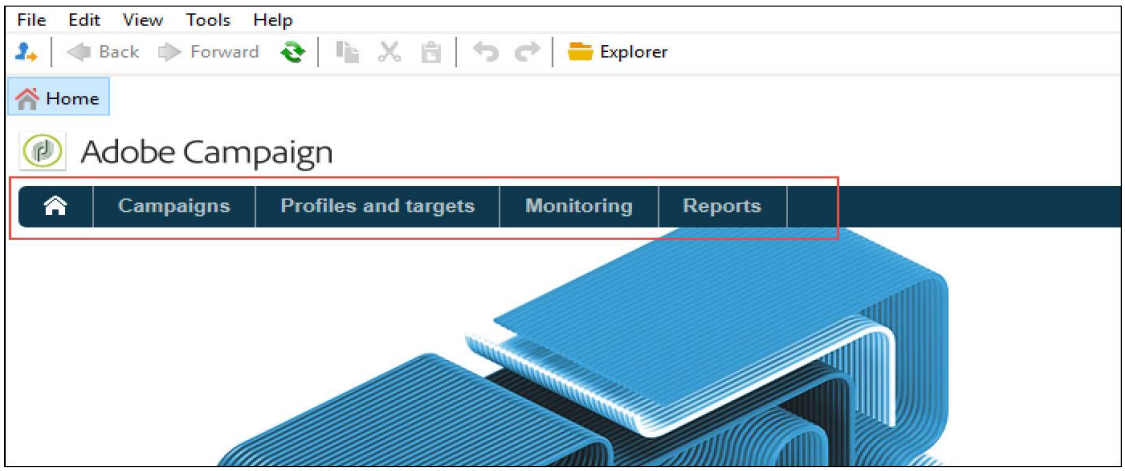


Navigating Through the Adobe Campaign v7 UI

You can access the Adobe Campaign platform by using a console or a browser. The platform accessed using the browser has a reduced set of functionalities compared to the platform accessed through the console.

After you connect to the database, you can access the Adobe Campaign **Home** page, which is a dashboard. The functionalities of the dashboard are grouped as various universes such as **Campaigns**, **Profiles and targets**, **Monitoring**, and **Reports**.

NOTE: The elements on the **Home** page vary depending on the installed applications and operator rights. It is likely the **Home** page for an admin (shown below), which may look different from your **Home** page.



The universes consist of links and shortcuts that help you access applications, such as Delivery, Campaign, and Marketing Resource Management (MRM), and general platform configurations. Each universe includes a set of functionalities based on task-related needs and contexts.

Campaigns

The **Campaigns** universe is the dashboard that displays all campaigns you are working on, profiles and targets, social network information, environment monitoring information, and the reports for past or current campaigns.

You can customize your view of the dashboards/panels. A campaign calendar displays plans and programs, but most other campaign components display in a dashboard view.

Profiles and targets

The **Profiles and targets** universe enables you to access the database of recipient profiles stored in Adobe Campaign. In the **Profiles and targets** window, you can access recipients, lists, subscription services, and the existing targeting workflows and shortcuts to create workflows. The **Recipients** page enables you to perform frequent operations on profiles, such as edits, updates, adds, deletions, and sorts.

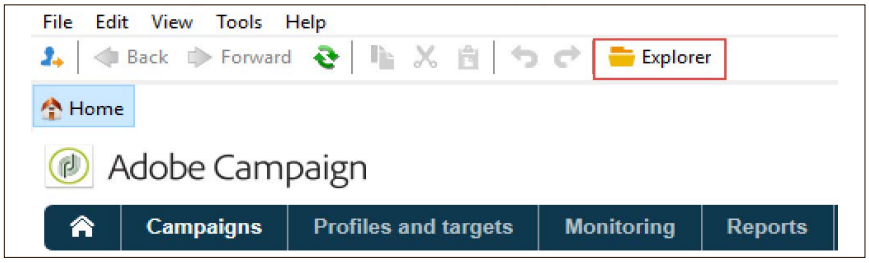
Monitoring

The **Monitoring** universe enables you to monitor the Application Server and the redirection server (tracking) manually or automatically. You must have admin access to have monitoring rights.

Reports

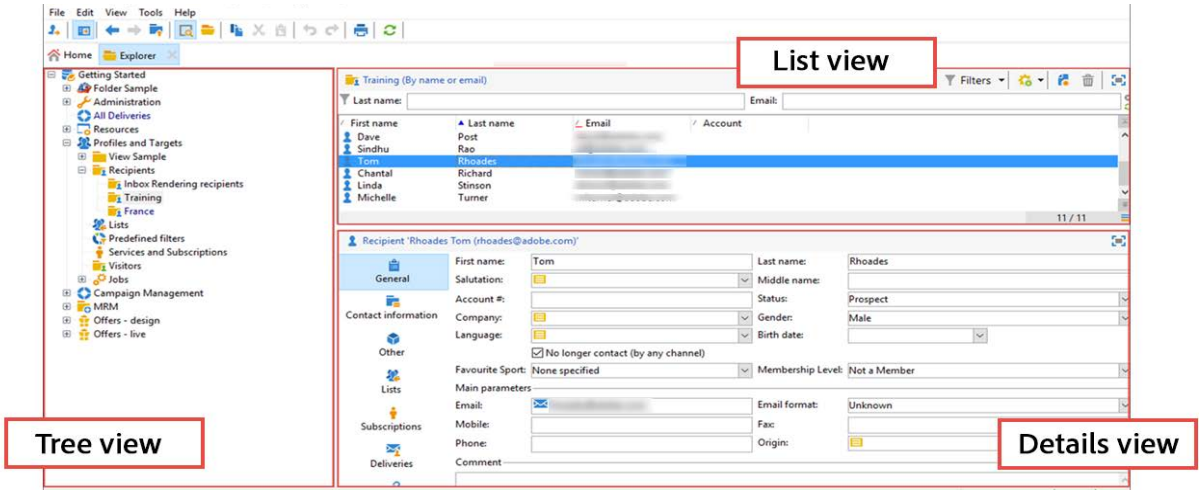
The standard platform reports are grouped in the **Reports** universe. You can export, print, archive, or display the report in a web browser by using the options on the toolbar.

The **Explorer** option provides the explorer view and consists full set of folders and configuration options.



You can click the **Explorer** option on the Adobe Campaign v7 dashboard to access the Explorer view. It is divided into three zones:

- Tree view: Helps you personalize the content of the Adobe Campaign tree (add, move, or delete nodes).
- List view: Helps you filter a list, run searches, add information, or sort data.
- Details view: Helps you display the details of the selected element.



Features of Adobe Campaign v7

Adobe Campaign v7 enables you to create, manage, and track digital marketing campaigns. Adobe Campaign v7 has innovative features to model, streamline, and automate marketing and customer communication processes.

The main features of Adobe Campaign v7 include:

- Email delivery
- SMS delivery
- Push notification
- Marketing cloud integration
- Social marketing
- Interactions
- Direct mail delivery
- ACS connectors
- Web API for Microsoft connectors
- Email archiving BCC method
- Amazon Simple Storage Service (S3) connector

Email Delivery

Adobe Campaign v7 enables you to mass deliver personalized electronic messages (email) as part of your marketing campaigns. The recipient profiles are stored in the database and must contain at least one email address. You can also send a delivery to recipients whose details are not saved in the database, but stored in an external file.

SMS Delivery

Adobe Campaign v7 enables you to send mass personalized deliveries of Short Message Service (SMS) messages as part of your marketing campaign. To perform this, the recipient profiles must contain at least one mobile telephone number.

Push Notification

Push notifications are the messages sent by mobile app publishers to mobile app users. These messages pop up on a mobile device with the app. Users receive them even if the app is not open. The Mobile App Channel in Adobe Campaign enables you to send personalized push notifications to iOS and Android devices.

Marketing Cloud Integration

Adobe Campaign v7 enables you to combine the delivery functionalities and advanced campaign management functionalities with a set of other solutions in Adobe Marketing Cloud. Depending on your environment, you can link several solutions as tenants to Adobe Marketing Cloud.

Social Marketing

Adobe Campaign v7 enables you to manage social networks. You can interact with the customers through Facebook and Twitter. On Facebook, the delivery content is in the form of publications on page walls and through news feeds. On Twitter, the delivery content is in the form of tweets.

Interactions

The Interactions feature in Adobe Campaign v7 enables you to send and manage marketing offers to customers or target them at a specific point of time. These marketing offers can be a basic communication or a promotion for a service or one or more products. Offers are sent to contacts through an inbound channel, such as a website or a call center or through outbound channels, such as email delivery, direct mail, or SMS. You can create an offer catalog that will interface with inbound and outbound channels to select the best offer to send to a contact in a context. Interaction helps you create and manage a catalog of offers and configure the eligibility rules and application themes linked to them. It also helps you personalize the offer content based on the channel chosen.

Direct Mail Delivery

Adobe Campaign v7 enables you to produce files to deliver personalized mails, such as catalogs, coupons, and flyers. Direct mail is a marketing collateral sent through postal mail to a customer's home or place of business. The target recipients can be the profiles stored in the database, and for profiles that are not available in the database, direct mails can be sent using external delivery. The recipient profiles must contain at least their names and postal addresses. The goal of the direct mail delivery in Adobe Campaign is to generate an extraction file that includes contact details of recipients. You will then route your extraction file to the agency or department that sends out the delivery.

ACS Connectors

The ACS Connector bridges Adobe Campaign v7 and Adobe Campaign Standard. It is available in the Adobe Campaign Prime and automatically replicates the profile data to Campaign Standard, enabling marketers to create, personalize and execute campaigns through the intuitive web UI of Adobe Campaign Standard (ACS). With the ACS Connector, digital marketers can use Adobe Campaign Standard to design, target, and execute campaigns. Adobe Campaign v7 is tailor-made for data-oriented users, such as database marketers.

Web API for Microsoft Connectors

Adobe Campaign V7 provides various CRM connectors for linking your Adobe Campaign platform to your third-party systems, such as Salesforce.com, Oracle On Demand, Microsoft Dynamics CRM, and Microsoft Dynamics Online. These CRM connectors allow you to synchronize contacts, accounts, and purchases. You can select the Web API connector as a deployment type when creating a Microsoft Dynamics external account.

Email Archiving BCC Method

Adobe Campaign v7 enables you to archive emails using a BCC (blind carbon copy) address - invisible to the message recipients - to transfer an exact copy of the sent emails to a remote server. When activated in the delivery or delivery template, this feature allows you to send an exact copy of the corresponding sent messages to a BCC email address.

Amazon Simple Storage Service (S3) Connector

The file transfer activity in Adobe Campaign v7 enables you to receive or send files, test for file presence, or list files on a server. The protocol used is either Amazon Simple Storage Service (S3), File Transfer Protocol (FTP), or Secure File Transfer Protocol (SFTP). The Amazon Simple Storage Service (S3) connector enables you to import or export data to Adobe Campaign. You can set up this activity in a workflow and configure this feature in an external account.

Chapter Two

Designing a Campaign

Objectives

By the end of this chapter, you will be able to:

- Explain the process involved in designing a marketing campaign
- Explain how to create and edit a campaign
- Send an email delivery
- Plan a marketing program
- Create a marketing campaign

Adobe Campaign: Key Concepts

Adobe Campaign v7 enables you to configure, execute, and analyze marketing campaigns. You can manage all marketing campaigns from a unified control center.
Some key concepts related to Adobe Campaign are:

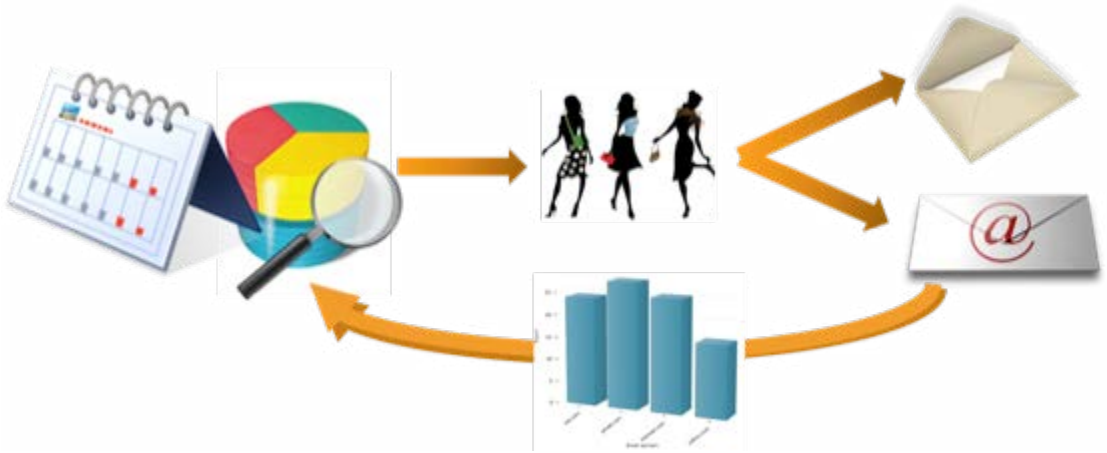
- **Campaign**: A campaign centralizes all elements related to a marketing campaign, such as deliveries, targeting rules, costs, export files, and related documents. Each campaign is attached to a program.
- **Program**: A program helps you define the marketing actions, such as launching and canvassing, for a calendar period. Each program contains the campaigns linked to a calendar, which provides an overall view.
- **Plan**: The marketing plan can contain multiple programs. It is linked to a calendar period and has an allocated budget. You can also link the marketing plan to documents and objectives.
- **Objectives**: Objectives are quantified values to be achieved. Within the campaign, program, or plan, you can state a list of objectives. At the end of the campaign, program, or plan, Marketing Resource Management (MRM) helps you compare the objectives and results in dedicated reports. It enables you to measure the success and profitability of marketing campaigns or offer propositions for all communication channels such as email, mobile, telephone, direct mail, fax, and agency.
- **Delivery outline**: A delivery outline is a structured description of a delivery. Every delivery can refer to a delivery outline, which contains, for example, related offers, documents to be attached, or a link to stores. An offer can be referenced in the delivery according to the delivery outline selected.
- **Workflows**: A workflow enables task automation. You can execute deliveries, manipulate files, approve campaigns, and notify operators by using workflows.

  Adobe Campaign v7 uses workflows to:

  > Define the logic of marketing campaigns. You can build the target and create the deliveries for each campaign.
  > Generate targets and segments.
  > Perform technical processes in Adobe Campaign such as cleaning up and collecting tracking information.

Managing Marketing Activities

Adobe Campaign enables marketers to plan and execute their marketing campaigns. In Adobe Campaign, a marketing campaign process involves actions (deliveries), procedures (importing or extracting files), and resources (marketing documents, delivery outlines).



You can create your marketing campaigns to support the programs, develop the deliveries, execute the campaign, and measure the results all within Adobe Campaign. You can also execute marketing campaigns automatically, whenever required. You can have built-in approval cycles, time dependencies, and multiple touch points within your campaign in Adobe Campaign.

To plan marketing efforts in Adobe Campaign:

- Create one or more marketing plans
- Create one or more marketing programs as part of the marketing plan
- Create one or more marketing campaigns as part of the marketing program

Creating a Campaign

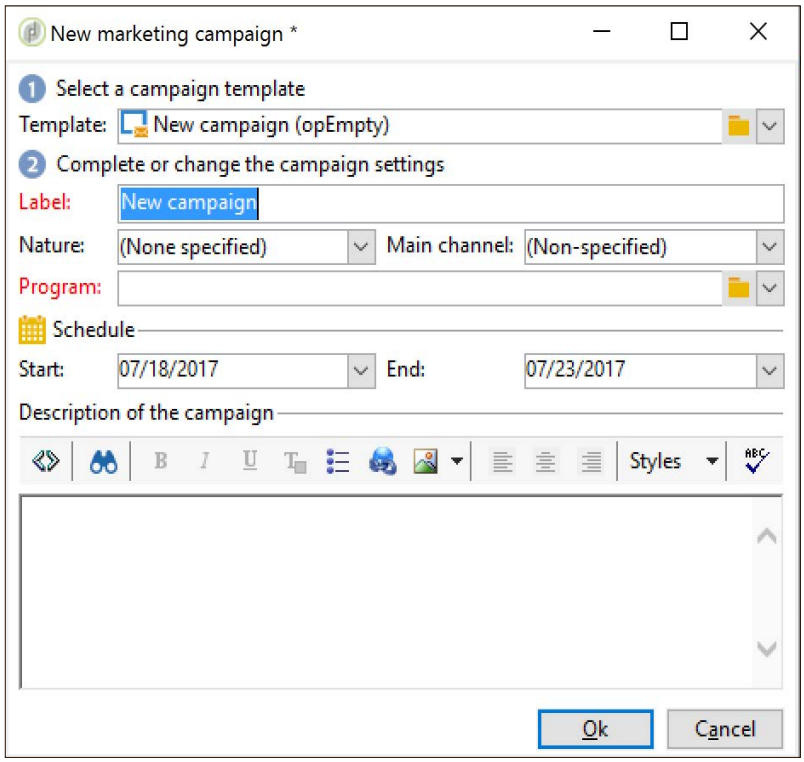
Here are the steps you need to follow when creating a marketing campaign:

1. Create a campaign: Involves adding a campaign description and its characteristics such as label, type, start and end dates, budget, associated resources, manager(s), and participants.
2. Define target population(s): Involves creating a workflow with targeting queries.
3. Create deliveries: Involves selecting channel(s) and defining the content to be sent.
4. Approve deliveries: Involves verifying and confirming deliveries.
5. Associate costs and plan deliveries: Involves defining cost categories and associating a service with a campaign.

After you create the campaign, you can start the deliveries, check the data, processes, and information relating to the deliveries, and, if necessary, manage the associated documents. You can also track the execution of the processing phases of campaigns and deliveries.

Campaigns are based on models that group a set of predefined parameters. In a default configuration, the campaign templates are stored in the **Resources** > **Templates** > **Campaign templates** node of the Adobe Campaign tree. An empty template is supplied out of the box in order to create a campaign for which no specific configuration is defined.

You can create and configure your campaign templates and then create campaigns by using these templates. You can create a new marketing campaign using the **New marketing campaign** dialog box as shown in this screenshot.

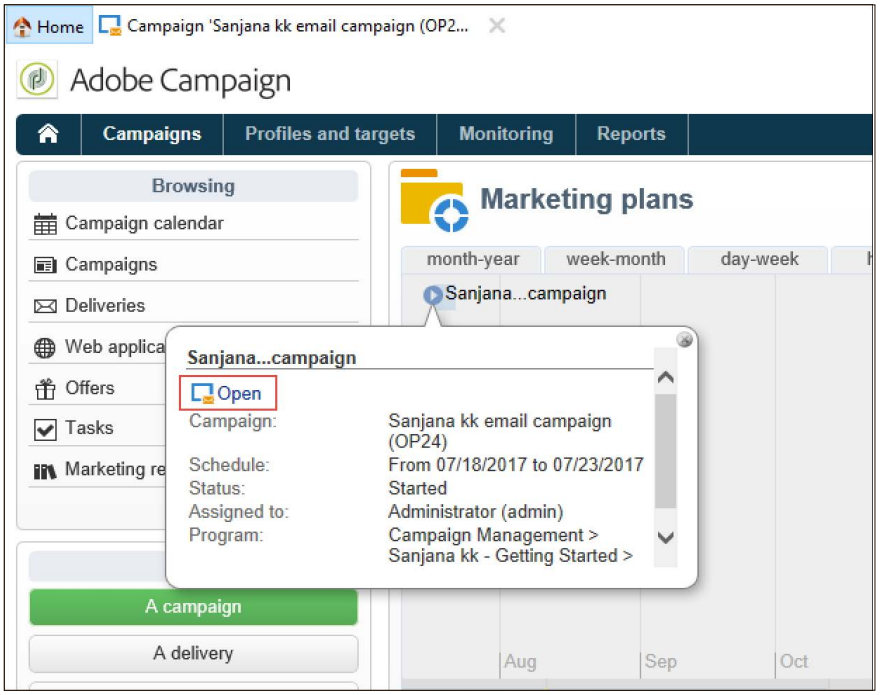


The dialog box has these options:

- **Template**: You can provide a starting definition for the campaign.
- **Label**: You can provide the front-end name of the campaign, which is the label used in searches. You should create and use a naming convention for labels.
- **Nature**: You can specify the type of campaign.
- **Program**: You can select the program in which the campaign is created.
- **Schedule**: You can provide the start and end dates for the campaign.

Editing the Campaign

You can open the campaign from the schedule, and then make changes to it from the campaign dashboard.



The campaign interface enables you to configure campaign approvals, manage your deliveries, set proof targets, schedule contact dates, and design and execute campaign workflows. When editing or setting up the campaign, you can modify the start and end dates.

NOTE: It is still possible to send out deliveries after the end date.

Based on these dates, the UI will display the following status:

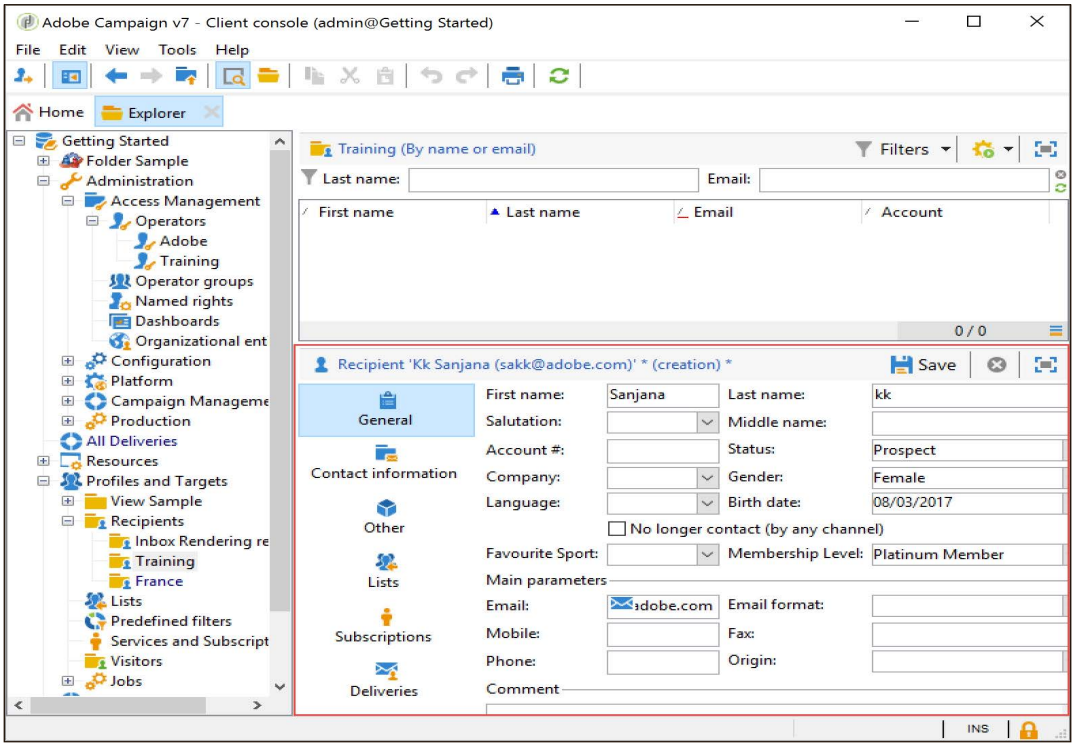
- Being edited: The status before the start date is reached.
- In Progress: The status when the start date is reached.
- Finished: The status when the end date is reached.

Exercise 2 – Add a recipient and send a delivery

In this exercise, you will add yourself as a recipient and send an email delivery to your assigned email ID.

Task 1: Add yourself to the recipient list

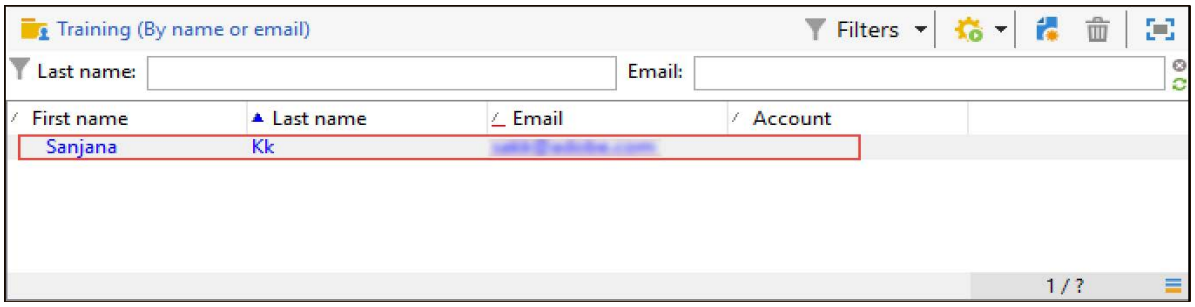
1. Click the **Explorer** button on the toolbar.
2. In the tree view, expand the **Profiles and Targets** folder and then expand the **Recipients** folder.
3. Select the **Training** subfolder.
4. Click the **New** icon above the list view. Enter your details in the detail view as shown:



NOTE: Use an email address you can access easily during the training class. You may use your personal email or your work email(s).

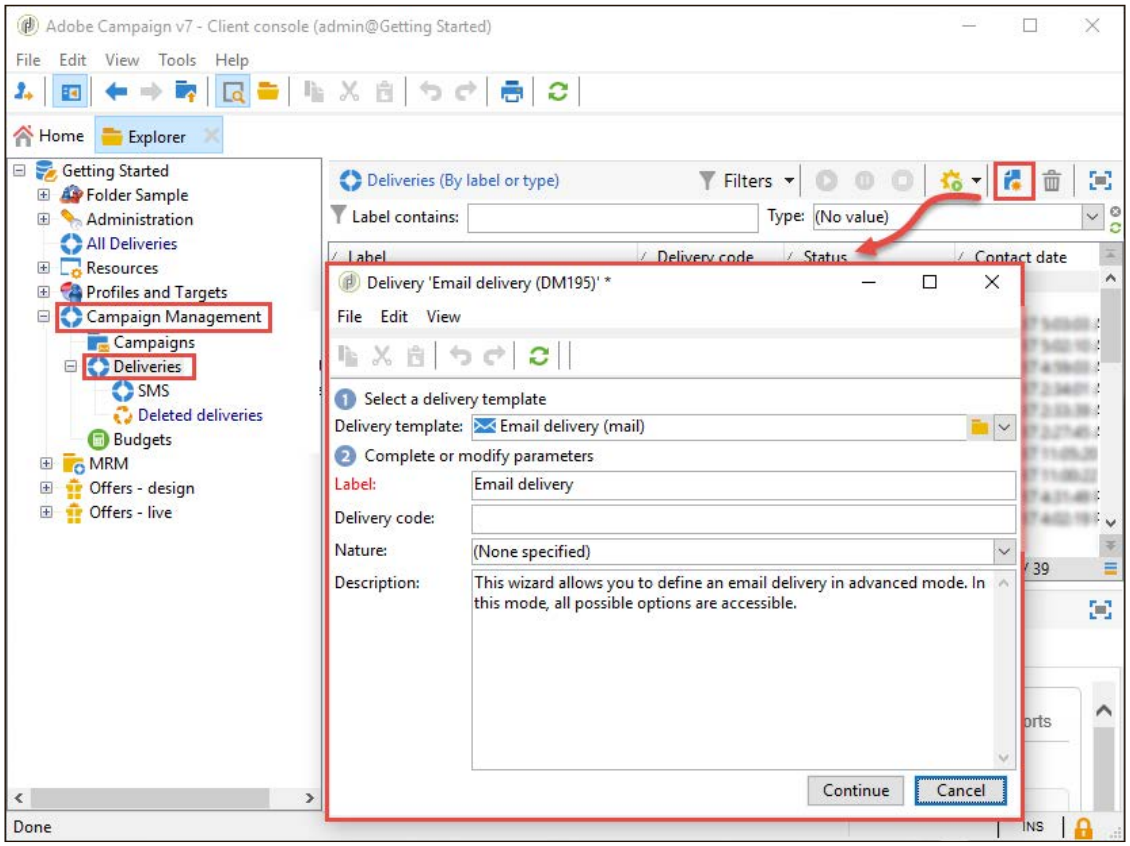
5. Click **Contact information** to enter your other details such as address, zip/postcode, city, and state.

6. Click **Save**. Adobe Campaign saves your recipient details.



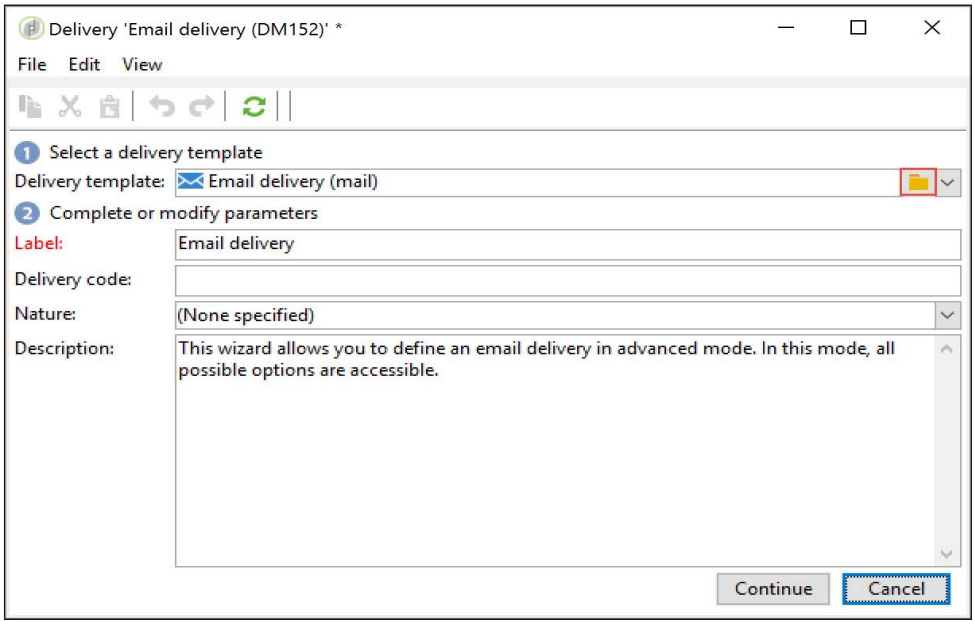
Task 2: Create a Platform Delivery

1. Click the **Explorer** button on the toolbar again to open the Explorer view.
2. On the tree view, expand the **Campaign Management** folder, and select the **Deliveries** subfolder.
3. On the list view, click the **New** icon. The Delivery Email delivery dialog box opens.

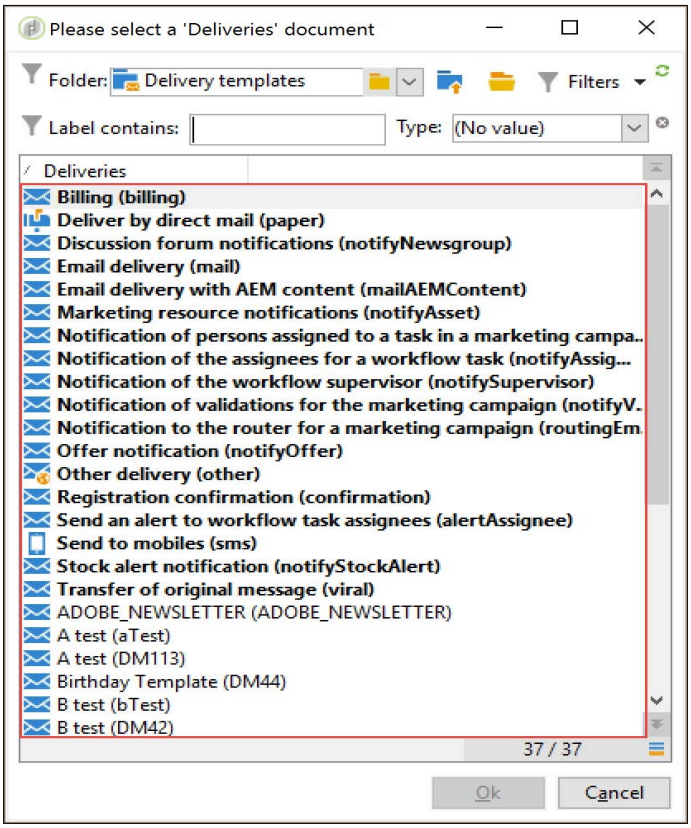


TIP: You can also access the Delivery Email delivery dialog box using the Dashboard. To access the Delivery Email delivery dialog box, from the **Home** page, click **Campaigns** universe> **Create** section > **A delivery**.

4. In the Delivery dialog box, complete these steps:
   a. In the **Delivery template** field, click the folder icon. The **Please select a Deliveries document** dialog box opens.



In the **Please select a Deliveries document** dialog box, in the **Folder** field, click the drop-down arrow and expand **Resources** > **Templates** and select **Delivery Templates**. The available delivery templates are displayed, as shown below:



b. Double-click a delivery template. In this exercise, **Birthday Template (DM44)** is selected for demonstration purposes. The template is selected in the Delivery dialog box.
c. In the **Label** field, enter **<Your first name> <Your last name> first email**. For example, if your name is John Doe, the label would be: **John Doe first email**.
d. Click **Continue**. The **Delivery <Your first name> <Your last name> first email** dialog box displays.

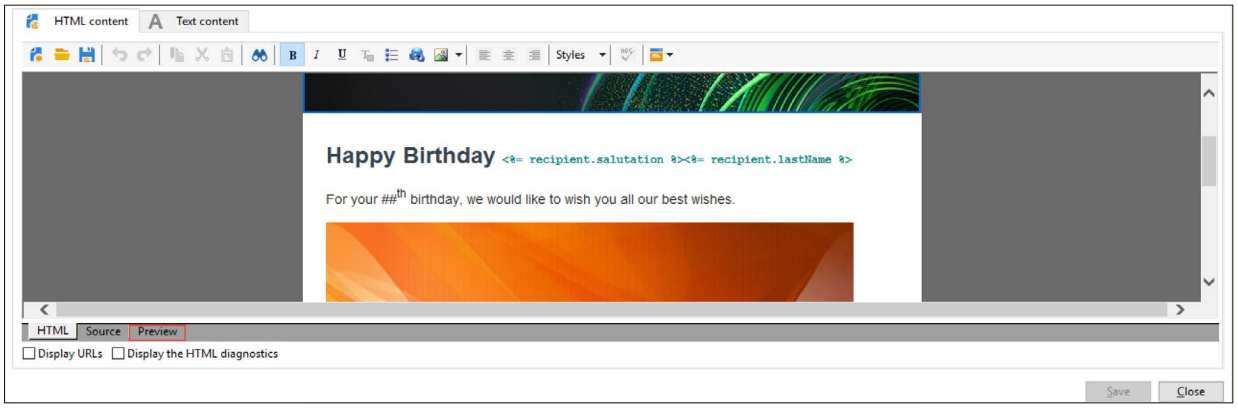
5. In the **<Your first name> <Your last name> first email** dialog box, click **Save**. The email delivery is saved.

Task 3: Preview the Delivery

1. On the Explorer view, expand the **Campaign Management** folder, and select the **Deliveries** subfolder.
2. In the list view, the delivery is displayed. Double-click the delivery you created in task 2. The **Delivery <Your first name> <Your last name> first email** dialog box opens.

TIP: You can access the delivery using the Dashboard. To access the delivery, from the **Home** page, click **Campaigns** universe> **Browsing** section> **Deliveries**.

3. In the **Delivery <Your first name> <Your last name> first email** dialog box, click the **Preview** tab.



You can preview the email on both **HTML content** and **Text content** tabs.

4. Click **Preview** in the **HTML content** tab.
5. Click **Test personalization** > **Recipient**. The **Select a recipient** dialog box opens.

   In the **Select a recipient** dialog box, in the **Folder** field, click the folder icon and expand the **Recipients** folder, select the **Training** subfolder, and click **Ok**. The recipients in the **Training** subfolder are displayed.

6. Select your profile and click **Ok**. The preview is generated.

7. Click **Save**. The delivery is saved.

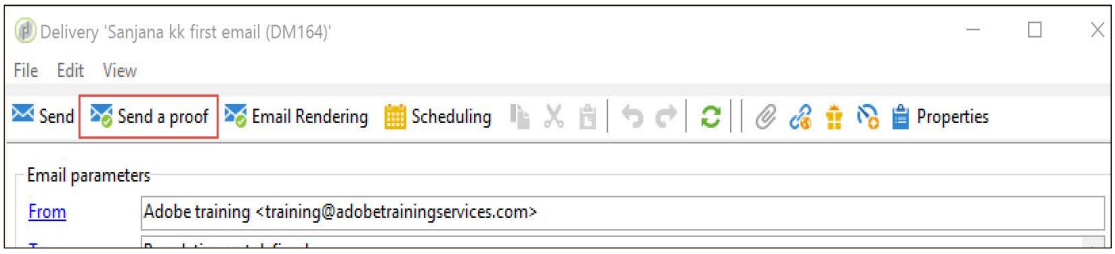
NOTE: You will learn more about the steps involved in previewing a delivery later in the course.

Task 4: Send a Proof of the Delivery

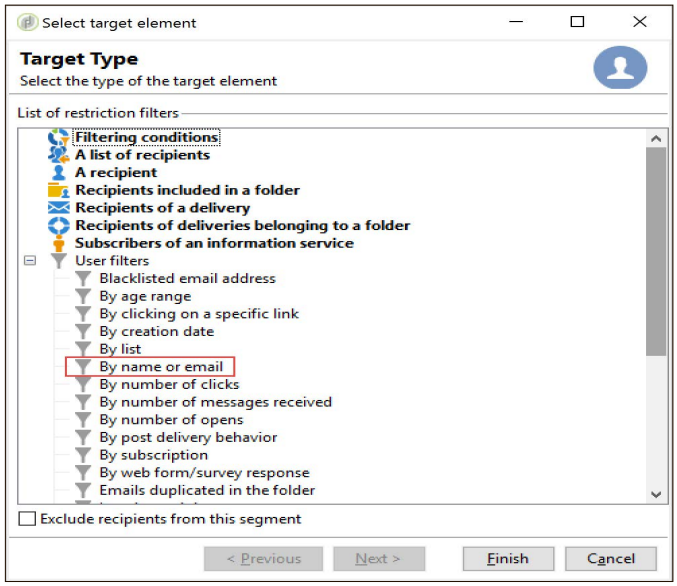
1. On the Explorer view, expand the **Campaign Management** folder, and select the **Deliveries** subfolder.
2. In the list view, the delivery is displayed. Double-click the delivery you created in task 2. The **Delivery <Your first name> <Your last name> first email** dialog box opens.

IMPORTANT! Make sure your email also has a subject in the Subject line in the email. Without it, Adobe Campaign cannot send the proof.

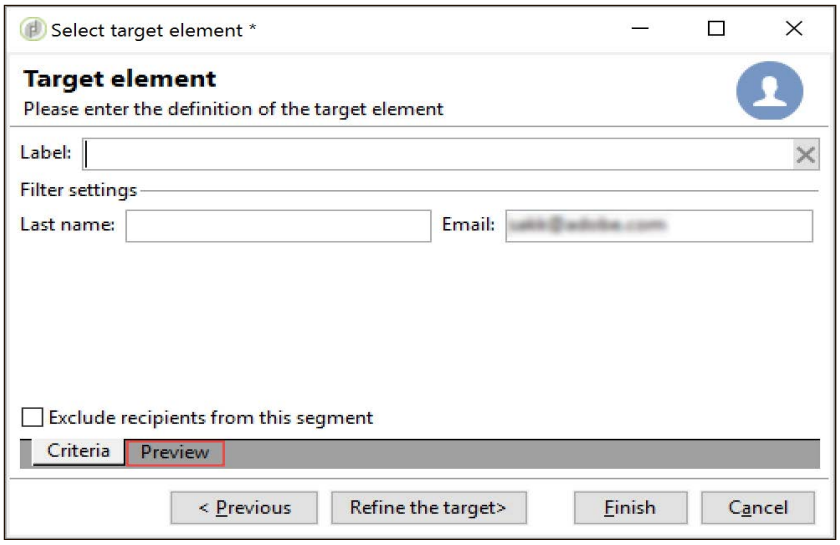
3. Click **Send a proof**. The **Send a proof** dialog box opens.



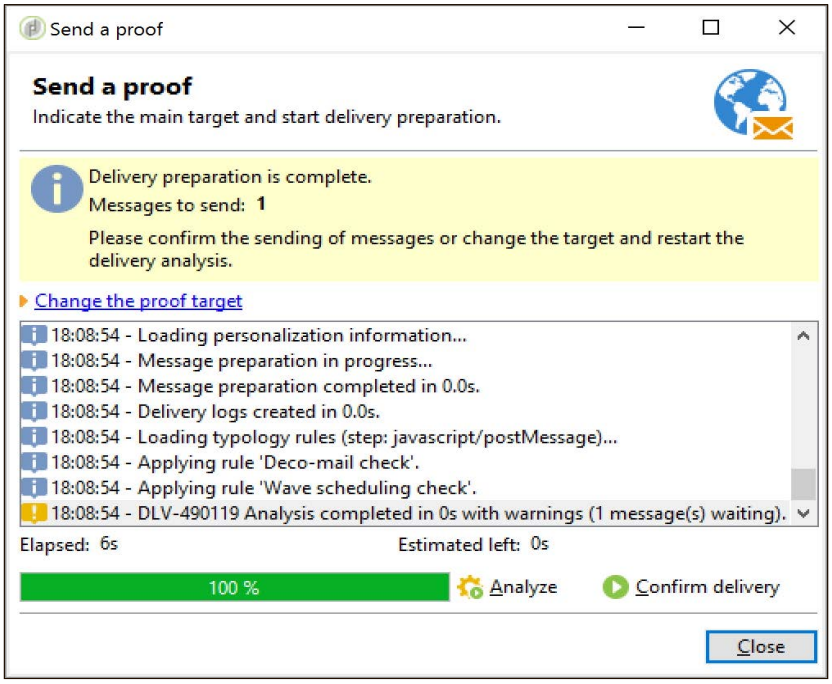
4. In the **Send a proof** dialog box, click **Add**. The **Select target element** dialog box to enter a target type opens.
5. In the **Select target element** dialog box, expand **User filters** and double-click **By name or email**. The **Select target element** dialog box, which enables you to enter the definition of the target element, opens.



6. In the **Select target element** dialog box, in the **Email** field, enter your email ID - making sure it is the one you used to create your recipient profile earlier.
7. Click **Preview**. The recipient profile displays, showing all the information you entered (for yourself) when you created your profile.



8. Click **Finish**. The email is added in the **Send a Proof** dialog box.
9. Click **Analyze** and wait until the dialog box displays **Message to send: 1** and the progress bar is completely green, labeled 100%.



10. Click **Confirm delivery.** A confirmation dialog box opens.

11. Click **Yes**. The delivery starts and the **Send a proof** dialog box indicates you can close the window.
12. Click **Close**. You will receive an email in your inbox.
13. Click **Save** in the **Delivery <Your first name> <Your last name> first email** dialog box. The proof is sent successfully to your email account.
14. In the Explorer tree view, click **Campaign Management** and select **Deliveries**.
15. Select the delivery you created, and you will see the status of the proof displays in the detail view.

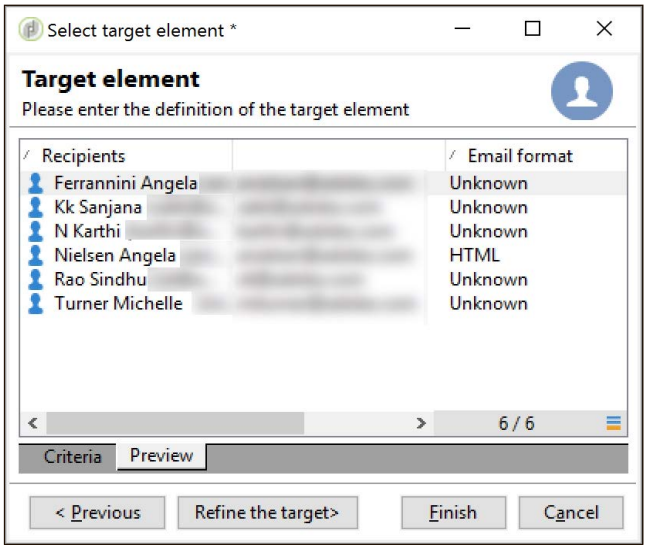
Task 5: Send the Delivery

1. On the Explorer view, expand the **Campaign Management** folder, and select the **Deliveries** subfolder.
2. In the list view, the delivery is displayed. Double-click the delivery you created in the task 2 (Do Not select [Proof 1] delivery). The **Delivery <Your first name> <Your last name> first email** dialog box opens.
3. Click your **<Your first name> <Your last name> first email** delivery. The **Delivery <Your first name> <Your last name> first email** dialog box opens.

IMPORTANT! Make sure your email also has a subject in the Subject line in the email. Without it, Adobe Campaign cannot send the proof.

4. Click **Send**. The **Send to the main delivery target** dialog box opens.
5. Click **Add**. The **Select target element** dialog box to enter a target type opens.
6. Double-click **Recipients included in a folder**. The **Select target element** dialog box to enter the definition of the target element opens.

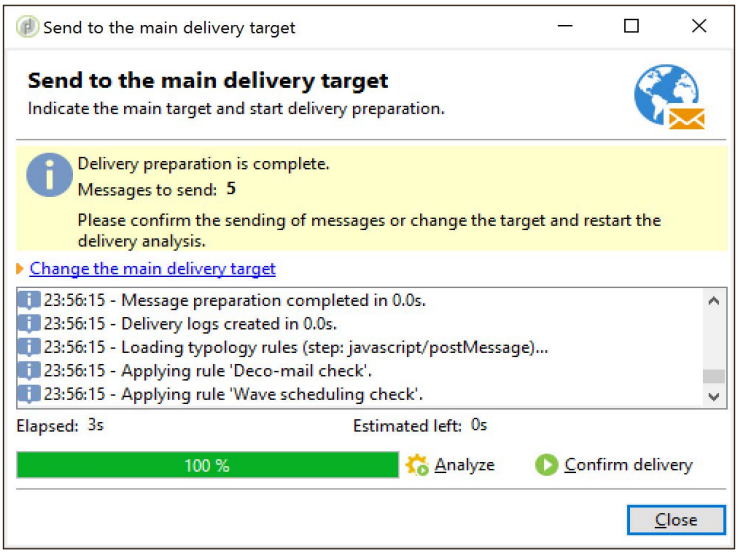
7. In the **Label** section, expand the **Recipients** folder and select the **Training** subfolder and click the **Preview** tab. The list of recipients is displayed, as shown:



8. Click **Finish**.

9. In the **Send to the main delivery target** dialog box, select **Deliver as soon as possible**.

10. Click **Analyze** and wait until the dialog box displays **Messages to send:** x. Here, x refers to the number of recipients. The number may differ based on the number of recipients.



11. Click **Confirm delivery.** A confirmation dialog is displayed. Click **Yes**. The delivery starts.

12. Click **Close**.

13. Click **Save** in the **Delivery <Your first name> <Your last name> first email** dialog box. The delivery is sent successfully.

14. In the Explorer tree view, click **Campaign Management** and select **Deliveries**. Select the delivery, the status of the delivery is displayed in the detail view.

TIP: You can also access the Deliveries using the dashboard. To access the deliveries using the dashboard, from the **Home** page, click the **Campaigns** universe> **Browsing**> **Deliveries**.

15. Notice the status of the delivery.

Exercise 3 – Create a plan, program and campaign hierarchy

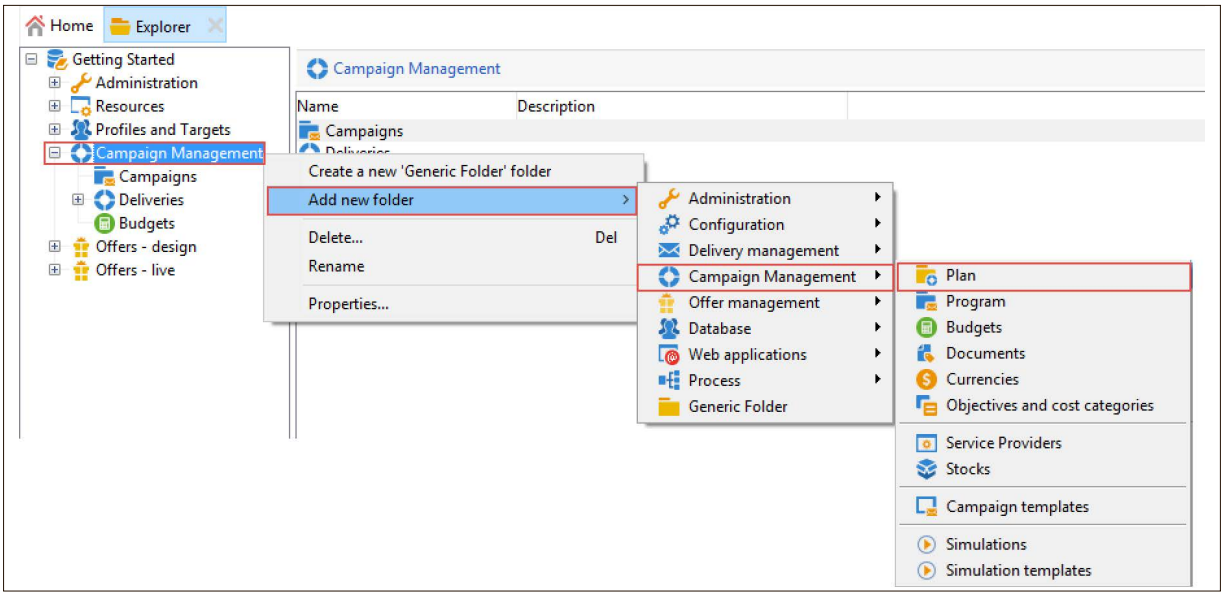
In this exercise, you will plan the following marketing programs and create a campaign for one of the programs:

- Acquisition
- Cross-sell
- Retention

Task 1: Plan marketing programs

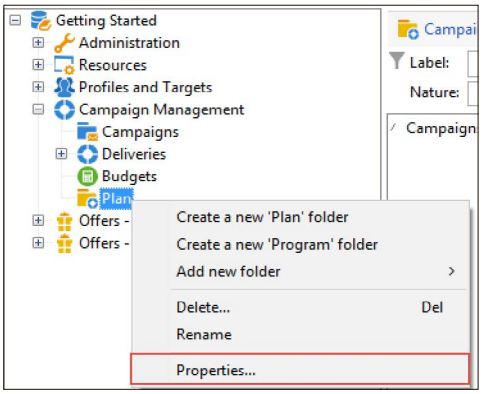
Create a plan containing a set of programs for cross-sell, retention, and acquisition.

1. On the **Explorer** view, right-click **Campaign management** root folder> **Add new folder**> **Campaign Management**> **Plan**. The **Plan** folder is created in the **Campaign Management** root folder.



TIP: You can also create a **Plan** using the Dashboard. On the **Home** page, click the **Campaigns** universe> **Create**> **More**> **Plan.** The **Plan New** dialog box opens. In the **Label** field, enter **<Your First Name> < Your Last Name> – Getting Started**. For example: **Jane Smith - Getting Started**
In the **Parent** field, click the drop-down arrow and select the root **Campaign Management** folder, then click **Save**.

2. Right-click the **Plan** folder and select **Properties**. The **Folder properties Plan** dialog box displays.

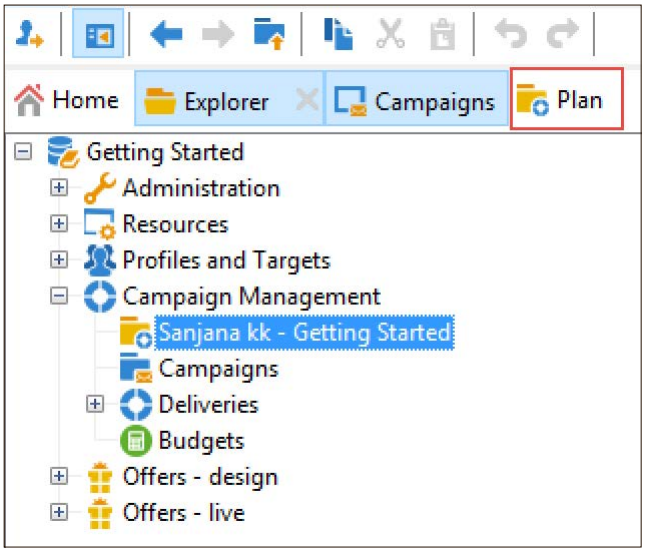


3. In the **Label** field, enter **<Your First Name> <Last Name> – Getting Started**. For example: **Jane Smith - Getting Started**

NOTE: You do not need to change the value in the **Internal name** field.

4. Click **Save**.

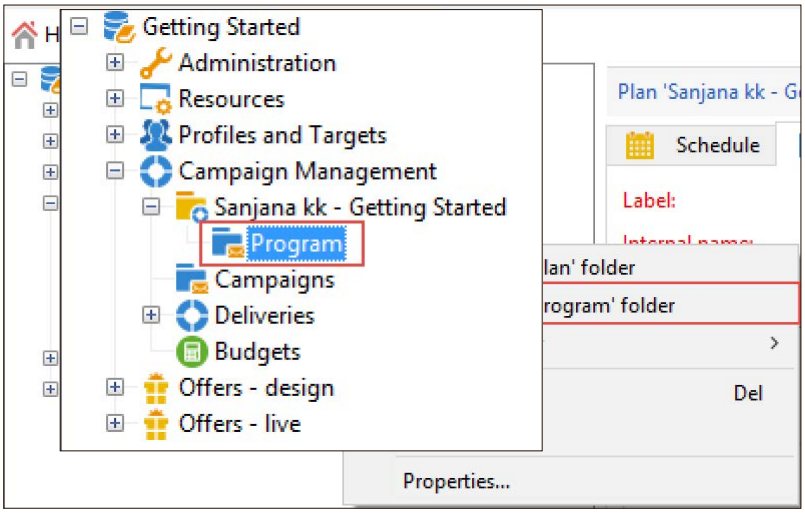
5. On the tree view, select **<Your First Name> <Last Name> – Getting Started** and click the **Plan** tab as shown. The **Plan <Your First Name> <Last Name> – Getting Started** view opens in the list view.



6. Click the **Edit** tab and set the **Start** and **End** dates to correspond to the current calendar year.

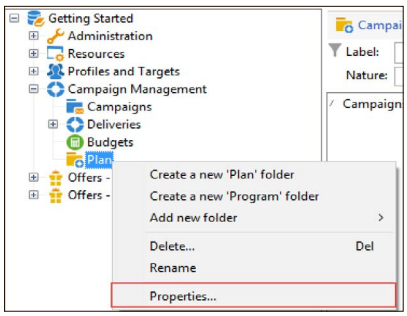
7. Click **Save** in the upper right of the list view.

8. On the Explorer tree view, right-click the **<Your First Name> <Your Last Name> – Getting Started** program you created and select **Create a new Program folder**.



9. Verify the **Program** folder is created in the **<Your First Name> <Your Last Name> – Getting Started** plan folder.

10. Right-click the **Program** folder and click **Properties**. The **Folder properties Program** dialog box displays.

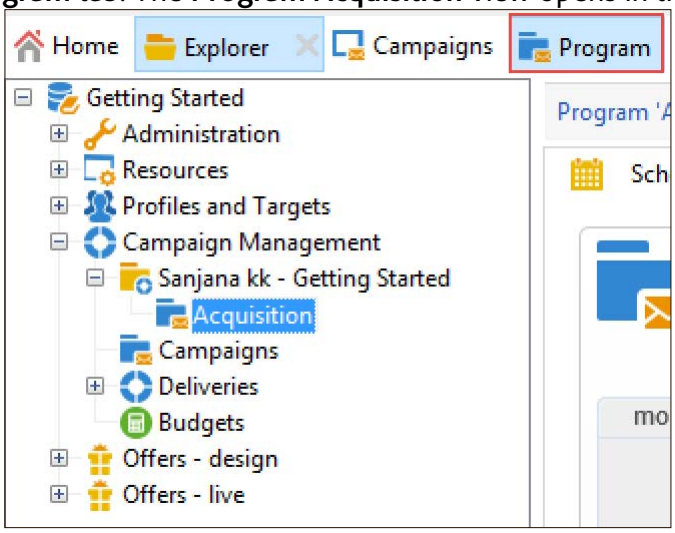


11. In the **Label** field, enter **Acquisition**.

12. Click **Save**. The program name is updated in the tree view.

13. In the tree view, select **<Your First Name> <Your Last Name> – Getting Started** and click **Acquisition**.

14. Click the **Program** tab. The **Program Acquisition** view opens in the list view.



15. Click the **Edit** tab and set the **Start** and **End** dates to correspond to the current calendar year.

16. Click **Save** in the upper right of the list view.

17. Create another new program under your marketing plan following the same instructions as described in the previous steps, except for the following:
    a. In the **Label** field, enter **Cross-sell**.
    b. For **Start** date, select the first day of the current quarter.
    c. For **End** date, select the last day of the current quarter.

18. Click **Save**. The program is saved.

19. Create a third program under your marketing plan following the same instructions as described in the previous step, except for the following:
    a. In the **Label** field, enter **Retention**.
    b. For **Start** date and **End** date, select the start and end dates of the current month.

20. Click **Save**. The program is saved.

Task 2: Create a campaign

Create a campaign to support one of your segmentation marketing programs.

1. In the Explorer tree view, click **Campaign Management** and select the **Acquisition** program you created in Task 1.

2. In the list view, click the **New** icon. The **New marketing campaign** dialog box displays.

3. In the **New marketing campaign** dialog box:
    a. In the **Template** field, click the drop-down arrow and select the template. For this exercise, keep the default template, **New campaign (opEmpty)**.
    b. In the **Label** field, enter **<Your first name> <Your last name> email campaign**. For example: **John Smith email campaign**

c. In the **Main channel** field, select **Email.**

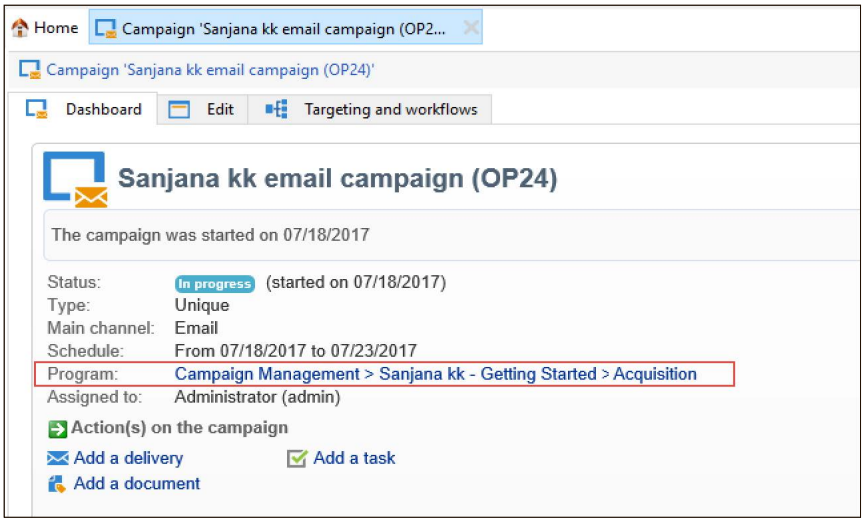
d. Keep the default start date and end date.

4. Click **Ok**. The newly created campaign is added to the list view.

5. Double-click the campaign. Your newly created campaign opens in its own workspace.

TIP: You can also create a campaign using the Dashboard. On the **Home** page, click the **Campaigns** universe> **Create** > **A campaign .** The **New marketing campaign** dialog box opens. In the **Template** field, click the drop-down arrow and select the template. For this exercise, keep the default template, **New campaign (opEmpty)**.In the **Label** field, enter **<Your first name> <Your last name> email campaign**. In the **Program** field, click the drop-down arrow and select **Acquisition**. In the **Main channel** field, select **Email** and keep the default start date and end date and click **Ok**.

6. Confirm the program location path is correct.



Chapter Three

Segmenting Recipients

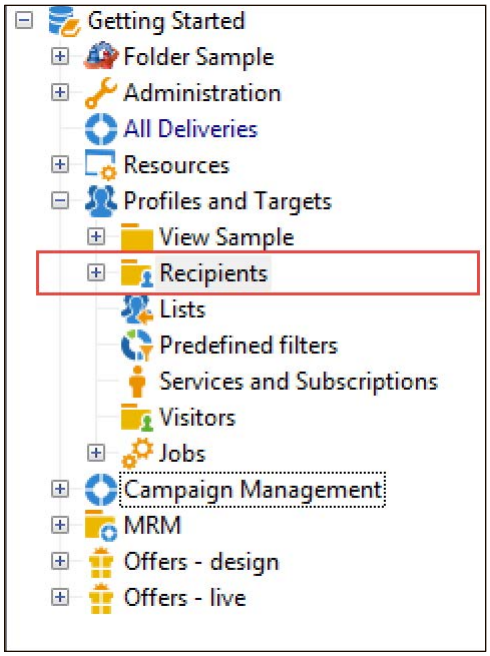
Objectives

By the end of this chapter, you will be able to:

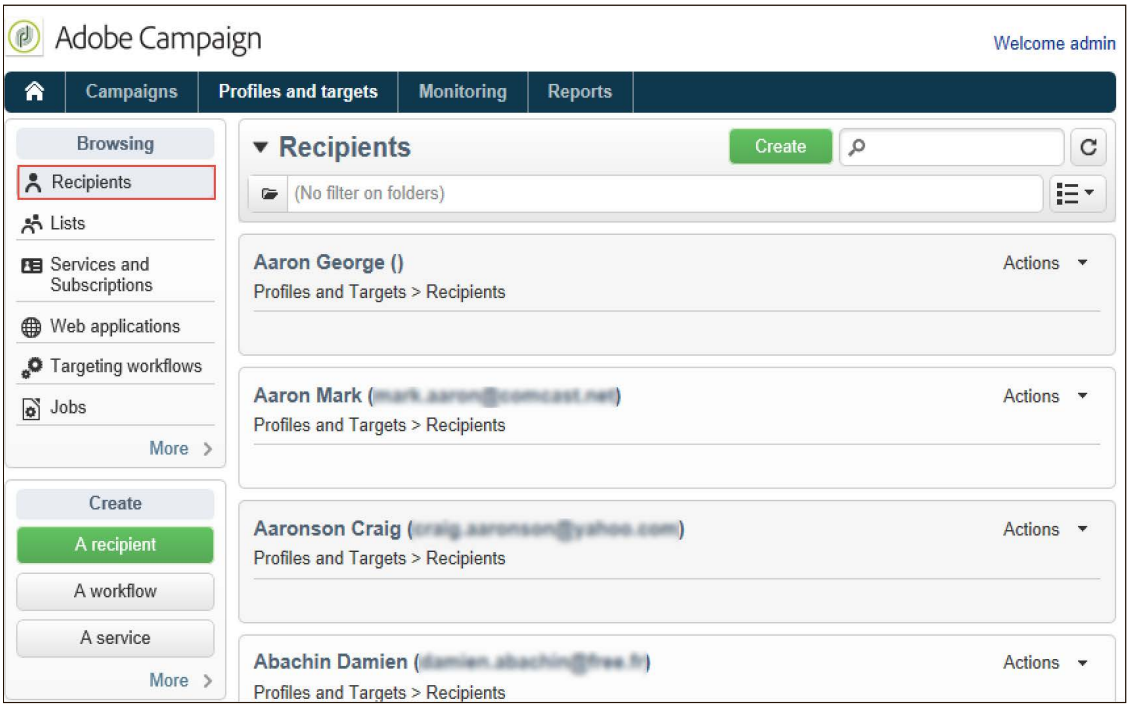
- Manage recipient data
- Create and run a target workflow
- Apply standard exclusions

Accessing the Recipient Data

The Explorer view of the Adobe Campaign enables you to go into the **Recipient** folder and browse through the customer database.



You can also access the **Recipients** option under the **Profiles and targets** universe to browse through the recipient data. Click the recipient name to edit the data.



Managing Recipient Data

Adobe Campaign enables you to manage recipient profiles throughout their entire lifecycle of a marketing campaign. Delivery recipients are stored in the database as profiles containing the information linked to them such as last name, first name, address, subscriptions, and deliveries. Each profile matches a database entry. They contain all information required for targeting, qualifying, and tracking individuals. When you create campaigns, you can define the target of the deliveries to the selected profiles in the database, based on simple or advanced criteria.

Filtering Data

Adobe Campaign enables you to apply filters to data lists. You can also save filters for future use. In addition, you can apply several filters at the same time. The following filter types are available in Adobe Campaign:

- **Default filters**: Default filters enable you to filter predefined fields such as name and email ID. You can access the default filter by using the fields located above the lists.
- **Simple filters**: Simple filters are defined with one or more simple search criteria on the columns. You can combine several simple filters on the same data list to refine your search. The filter fields are displayed one below the other.
- **Advanced filters**: Advanced filters help you filter recipient data using complex criteria to optimize your search. You can create advanced filter using a query or a combination of queries on the data.
- **User filters**: User filters are advanced filters that were saved to use and share their configuration with other operators. You can use a set of application filters that you can combine to refine the filtering.
- **Predefined filters**: Predefined filters allow you to filter the profiles of recipients contained in the database. You can set up a standard filter for others to reuse.

You can apply filters to the recipient data to identify a target population. For example, you can obtain a target with customers who bought a certain product during a given period. Filtering criteria can include:

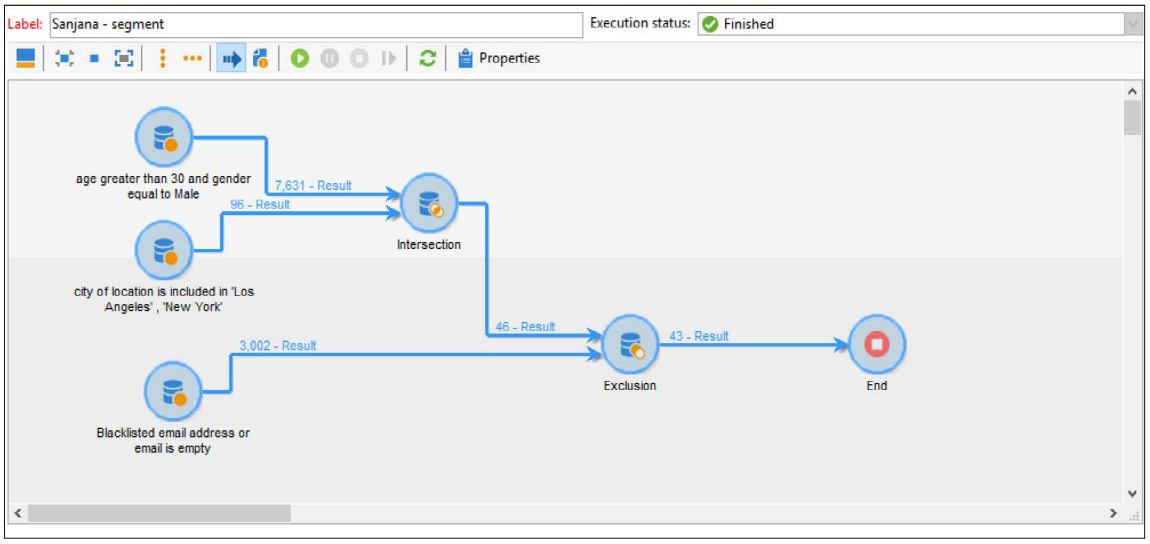
- Gender and age
- Shared geography
- Spending or delivery history

Any information you have in the data mart, including custom and standard attributes, can be used to determine the campaign target. You can apply filters to the recipient table and identify the target population. You can filter on any criteria known about the recipients.

Targeting and Segmentation

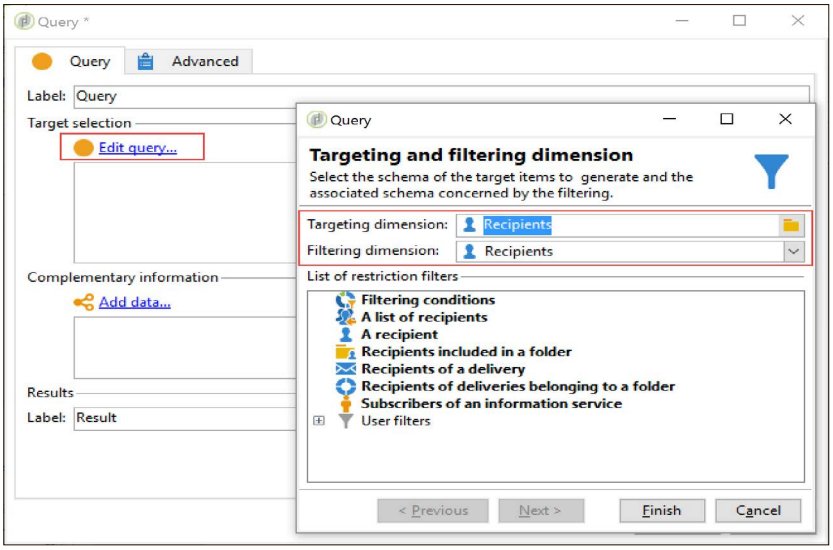
Adobe Campaign enables you to create workflows that can help marketers define multiple segments and offers. The workflow enables you to automate business processes. For example, a

campaign workflow executes the campaign. The segmentation workflows help personalize your campaigns and offers. These segments are created by using queries in workflows. You can create audience segments by filtering data available in the data mart. However, these segments are static and may not include the latest customer attributes. You can include segmentation in the campaign workflow to make the segments dynamic. The following screenshot displays a segmentation workflow.



Editing a Query

A query activity enables you to select basic data to build the target population. You can select a target according to some criteria. You can also associate a segment code to the query result and insert additional data into the query result. You can edit a query to define the targeting type, restrictions, and the selection criteria for the population by using the targeting and filtering dimensions.



The targeting dimension enables you to define the population targeted by the operation such as recipients, contract beneficiaries, operator, and subscribers. The filtering dimension enables you to

select the population based on certain criteria such as contract holders and newsletter subscribers. For example, to select clients who have had a life insurance policy for over five years, you can select clients as the targeting dimension and contract holder as the filtering dimension. The two dimensions are related and the content of the filtering dimension depends on the targeting dimension.

Selecting a Filter

Adobe Campaign enables you to select the type of filter to apply. The filter must work with the filtering dimension.

If you select recipients as the filtering dimension, you can use the following filters:

- **Filtering conditions**: Construct a logical expression to select profiles based on attributes.
- **A list of recipients**: Target a pre-populated list.
- **A recipient**: Target a recipient.
- **Recipients included in a folder**: Target profiles residing in a folder in the hierarchy.
- **Recipients of a delivery**: Reuse the target of an existing delivery.
- **Recipients of deliveries belonging to a folder**: Target all recipients of deliveries in a specific folder.
- **Subscribers of an information service**: Publish content to service subscribers.
- **User filters**: Target based on a predefined query.

Specifying a Filtering Condition

Filters are based on a logical expression. A query returns the recipients for whom the expression is true.

To define filtering conditions:

1. Add an expression line to the filter.
2. Find an attribute of recipient or related data.
3. Select an operator.
4. Enter or select a value the attribute will be compared with.
5. Optionally combine multiple expressions.

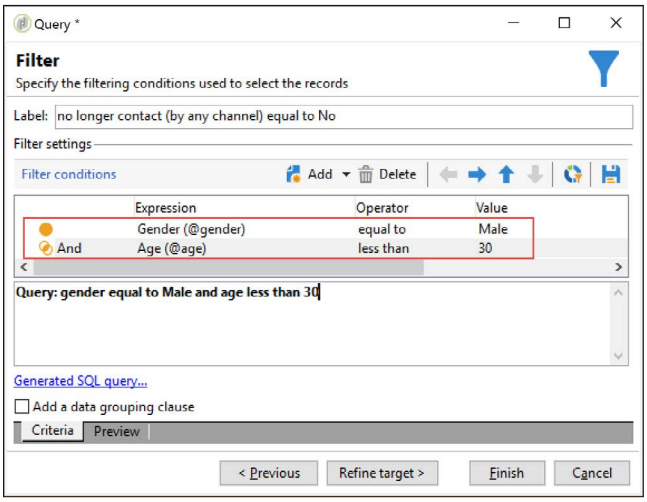
When you specify the filtering conditions, you are creating a logical expression. The first part of the expression is an attribute of a recipient or an attribute from a linked table to a recipient such as status. If the attribute has a set of values, these values will appear in the drop-down list.

For example, for status, the values are client, prospect, or not specified; for gender, the values are male, female, or not specified. After you specify an attribute, you can enter an operator such as equal to and a value to match against the targeting dimension client.

For, example, if you want to target men under the age of 30, you can use the **Filter** dialog box:

1. For the **Expression** field, select the attribute **Gender**.
2. Select **equal to** for the **Operator**, and select **Male** from the **Value**.

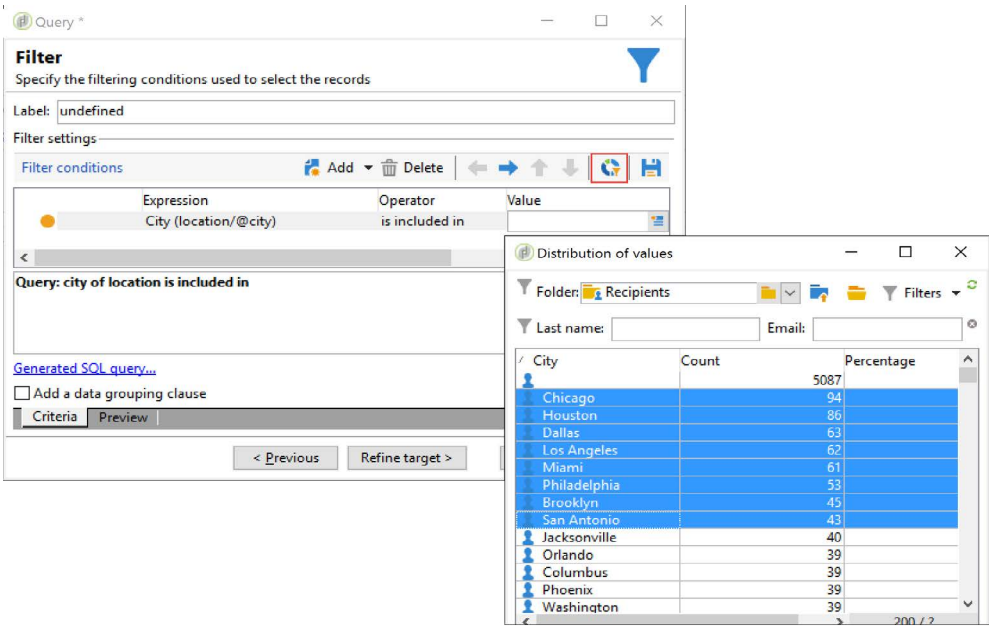
3. Add an additional **Expression** with **Age** as the attribute, **less than** as the **Operator**, and **30** as the **Value**. The following screenshot is the result.



By default, all expressions are combined with **AND**. You can change it to **OR** or **EXCEPT**, depending on what you want to accomplish.

Adding Multiple Values from a Distribution

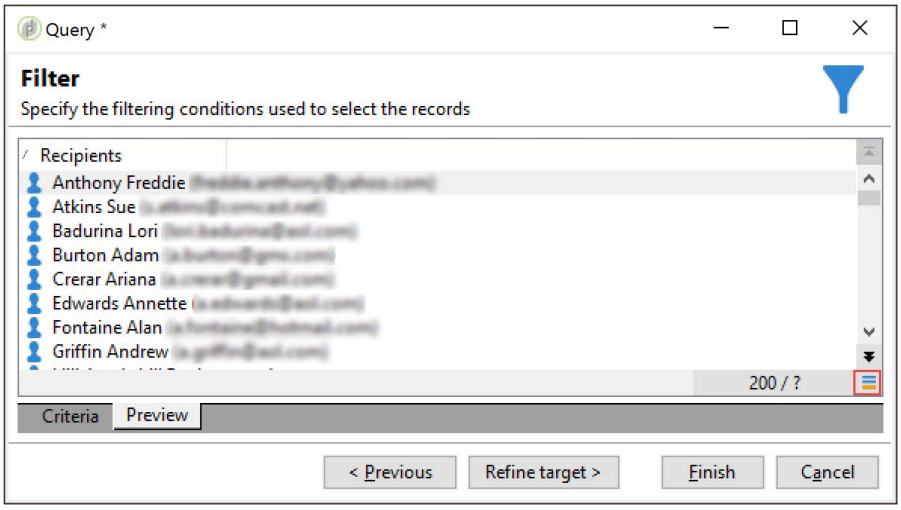
You can add multiple values to an expression. To do this, add an attribute, select the operator **is included in**, and then click the **Distribution of values** icon. All values currently in the data mart for the selected attribute are displayed. This can help you find valid values, such as cities and product categories.



NOTE: If you select **equal to** in the **Operator** field, you can select only one value. The values are listed in order of prevalence, so you will find the most common value first.

Configuring the Preview List

When creating a query, it is important to preview the results. By previewing the results, you can verify the logic used in the filter. When previewing the results of the query to verify your expression logic, you can configure the list to add or remove columns by using the **Configure List** icon.



Applying Standard Exclusions

Each business typically has a standard definition of who they want to exclude from their target. You can add a typology rule that is applied during the analysis to exclude contacts. You can also exclude them up front by creating a predefined filter to get a more accurate count.

To apply a standard exclusion, you can start with your target population, define one or more additional queries to choose the recipients you want to exclude, and then use an exclusion activity to exclude them from the main target.

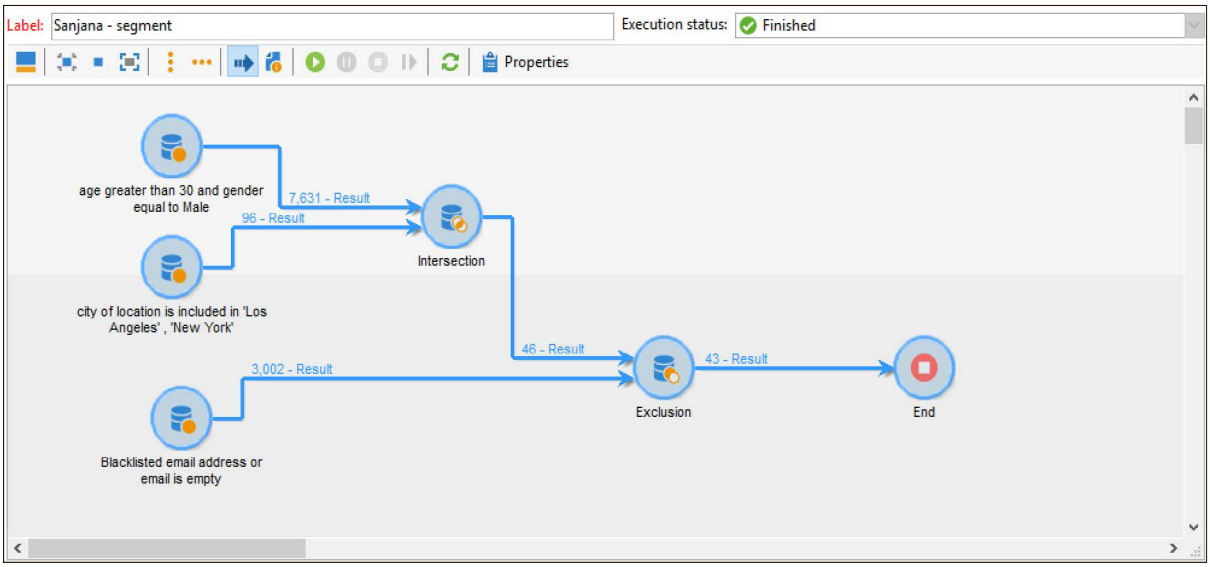
There are predefined user filters for excluding recipients. They are:

- Blacklisted email: Recipients who opted out either globally or by channel.
- Email in quarantine: If the mailbox is full or if the address does not exist, an email address can be quarantined.

You can also define your own filters to exclude recipients and save them for reuse.

Exercise 4 – Segment Recipients in a Target by Creating an Email Campaign Workflow

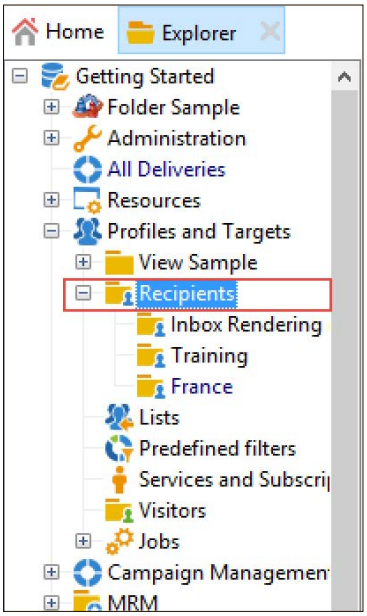
In this exercise, you will create a segmentation workflow by filtering males over the age of 30 in Los Angeles or New York and remove the recipients without email addresses and are blacklisted. By the end of this exercise, you will create a workflow similar to the following workflow.



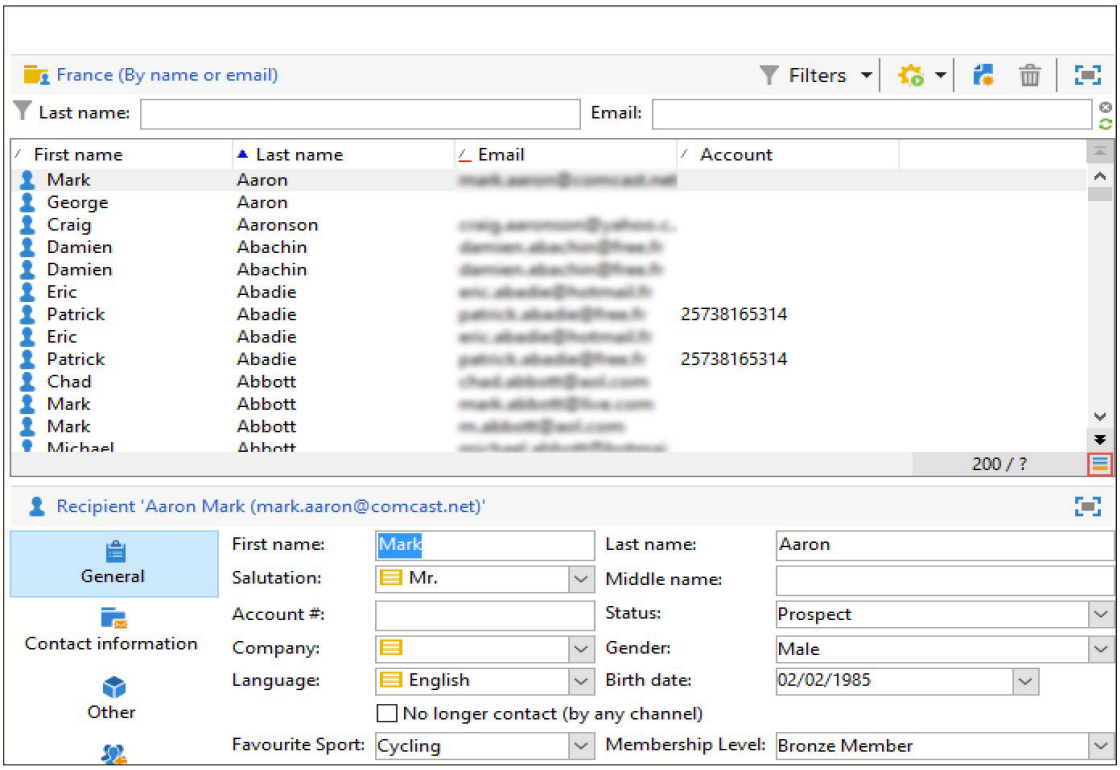
Task 1: Manage recipient lists

Manage your own recipient lists by sorting, adding columns, and adding a recipient manually.

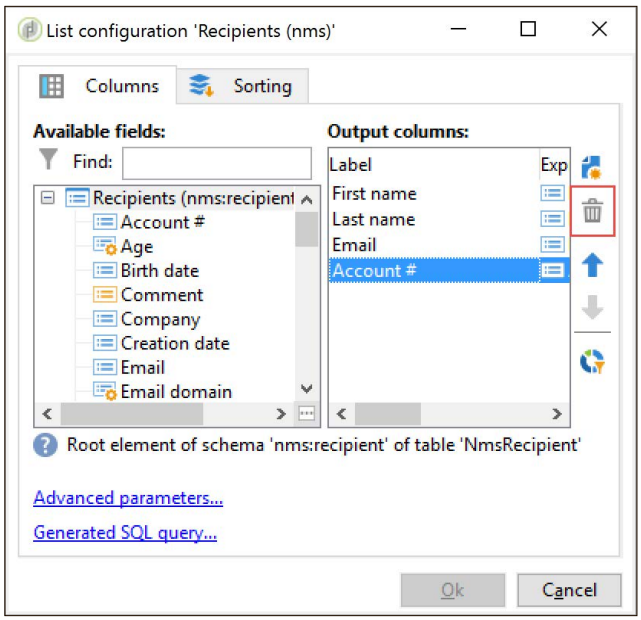
1. On the **Home** page, click **Explorer** from the toolbar. The **Explorer** window workspace is displayed.
2. On the tree view, expand the **Profiles and Targets** folder and click **Recipients**. The list of recipients is displayed in the list view.



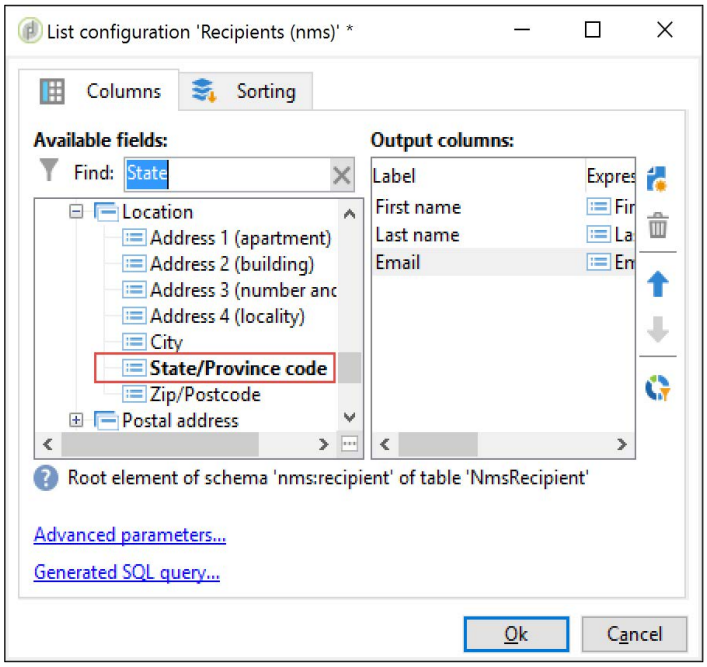
3. Click the **Configure list** icon in the list view (in the lower right, as shown in the screenshot) or right-click and select **Configure list**. The **List configuration Recipients (nms)** dialog box opens.



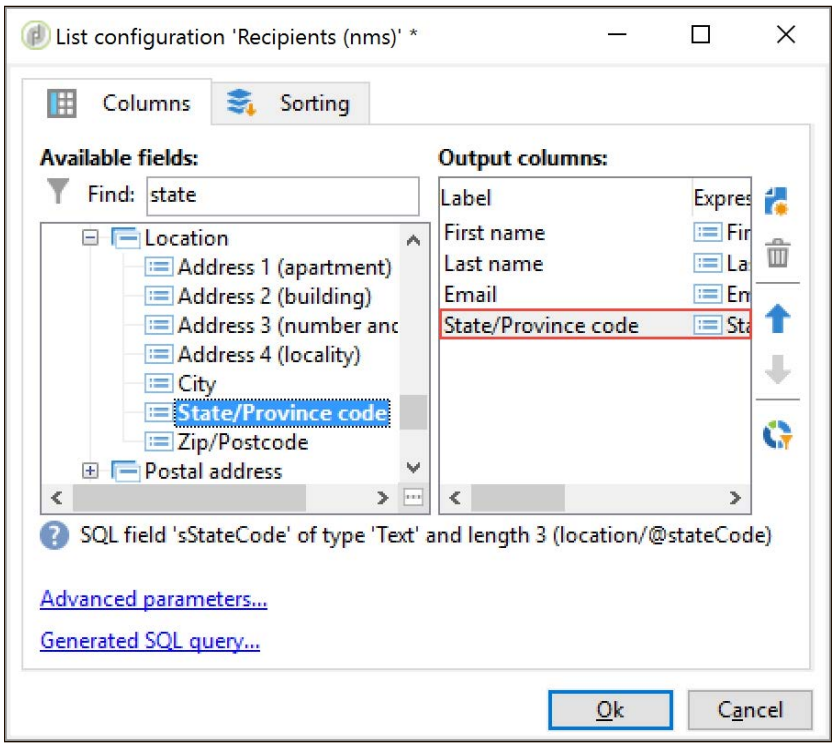
4. To configure the list view:
   a. In the **Output columns**, select **Account #**.
   b. Click the **Delete** icon to remove **Account #** from the **Output columns**. The **Account #** column is deleted from the list.



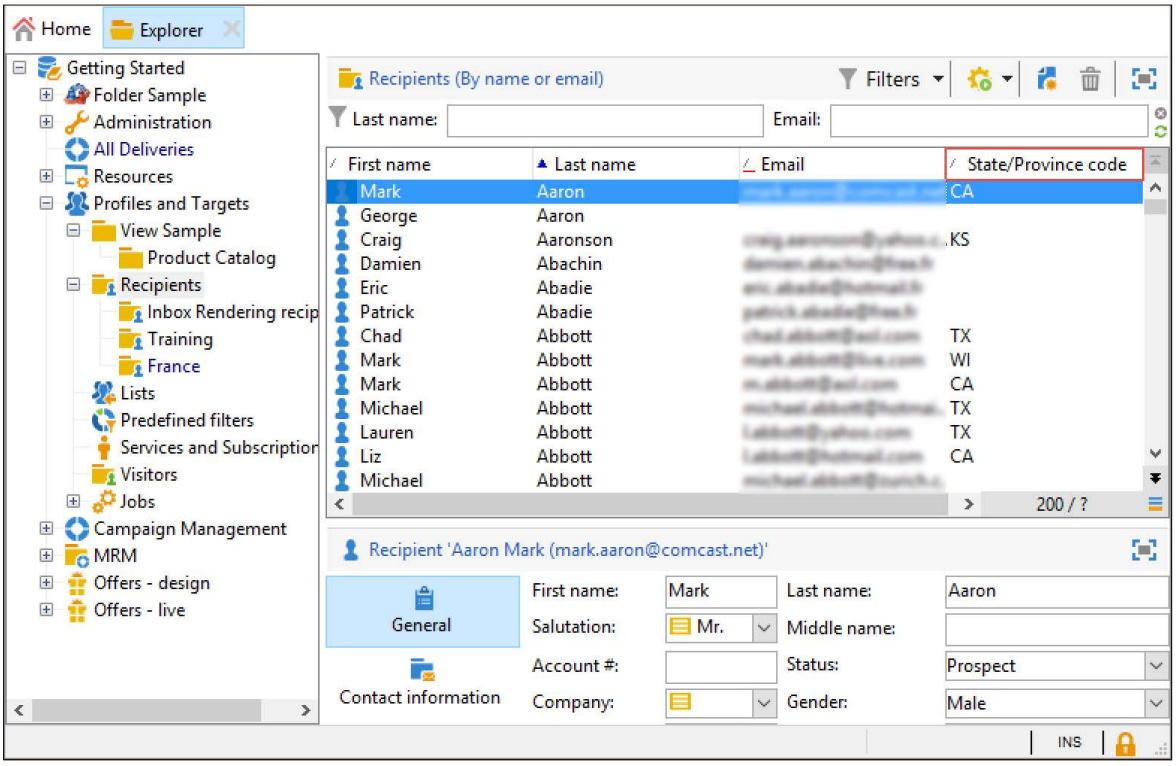
c. In the **Available fields**, enter **State** in the **Find** field and press **Enter**. The **State/Province code** column is selected in the available field and displayed in bold (font).



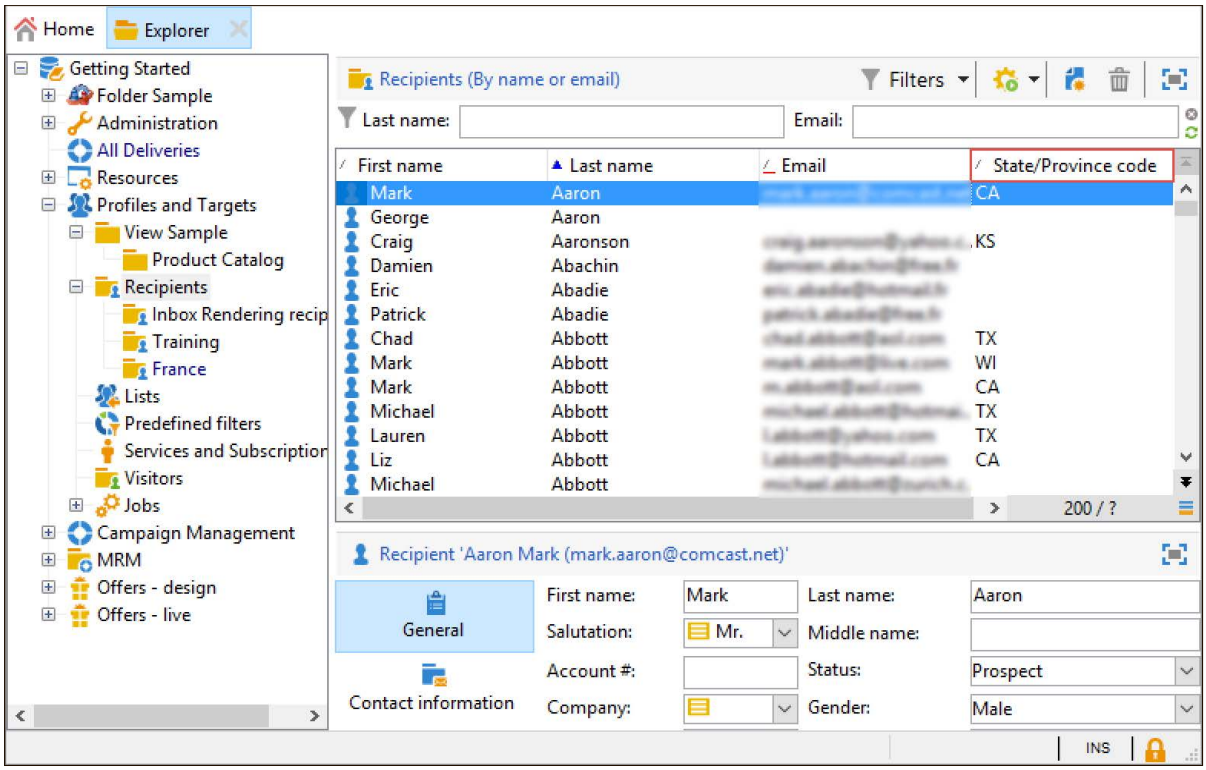
d. Double-click the **State/Province code** in the **Available fields** to add it to the **Output columns**.



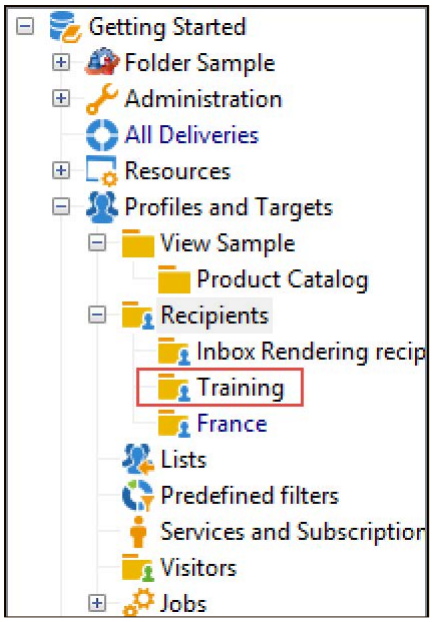
e. Click **Ok**. A new column **State/Province** code is added to the list view.



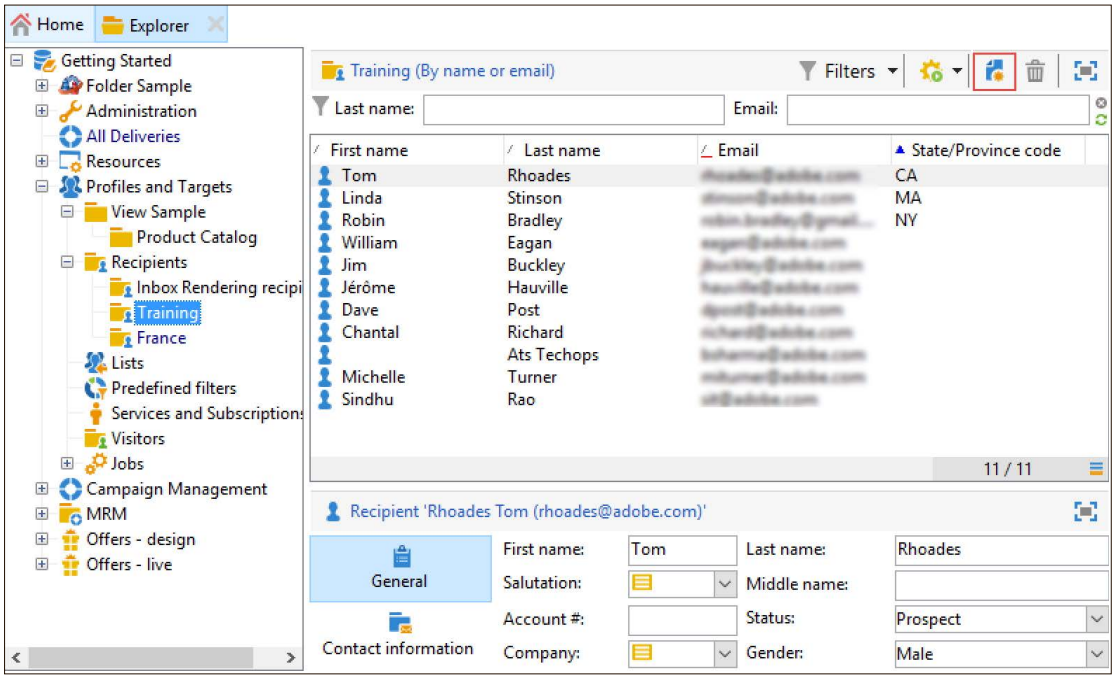
5. In the list view, click the **State/Province code** header to sort the list. The data in the **State/Province code** is sorted alphabetically, beginning with AK (Alaska).



6. On the tree view, expand the **Profiles and Targets** folder and then expand the **Recipients** folder.
7. Select the **Training** subfolder.



8. Click the **New** icon on top of the list view, as shown below:



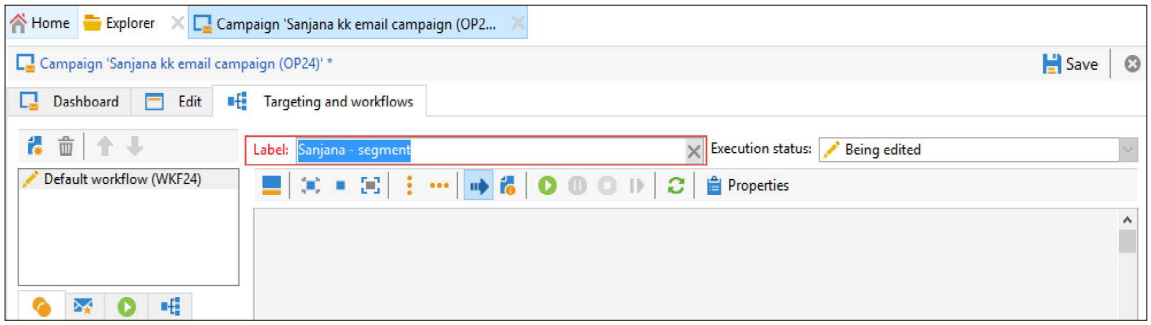
9. Enter a first name, last name, gender, birth date and email in the respective fields.
10. Click **Save**. The details are saved successfully. Your entry will appear in the **Training** subfolder.

Task 2: Create and run a targeting workflow

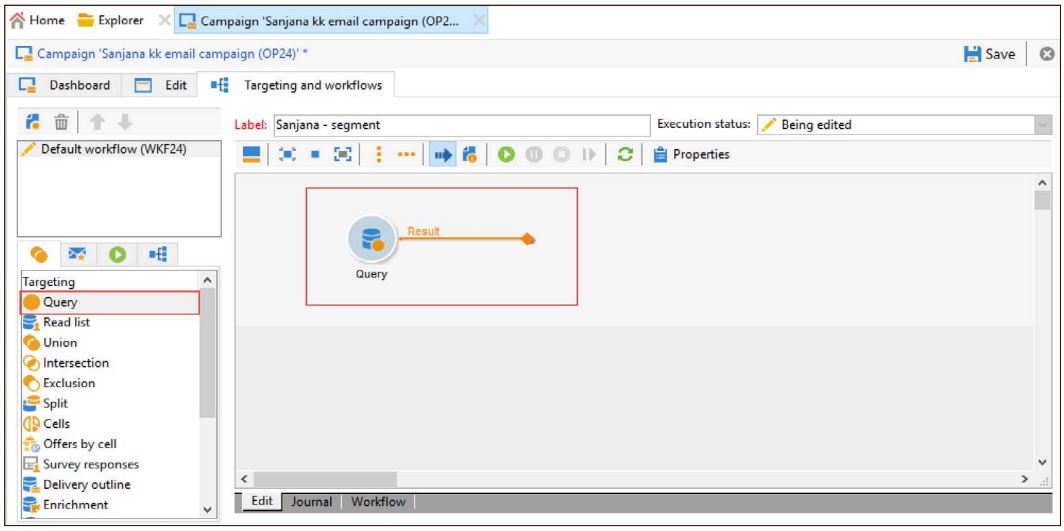
a. Create and run a targeting workflow in the workflow editor by using your recipient list.

b. Use filtering conditions in your workflow to segment your recipient list to include only males over 30 years of age.

1. In the Explorer tree view, click **Campaign Management** and select the **Acquisition** program you created earlier. The campaign you created is displayed in the list view.
2. Double-click the campaign you created in Exercise 3.
3. Click the **Targeting and workflows** tab.
4. In the **Label** field, enter **<Your name> - segment**.

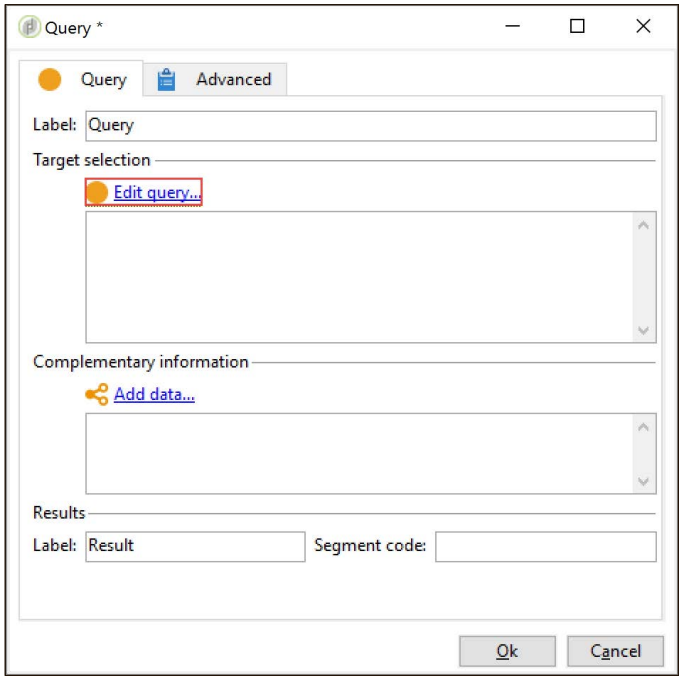


5. Click **Save**. The workflow is saved.
6. Drag a **Query** from the **Targeting** section onto the diagram.
7. Double-click the **Query** activity on the diagram. The **Query** dialog box opens.

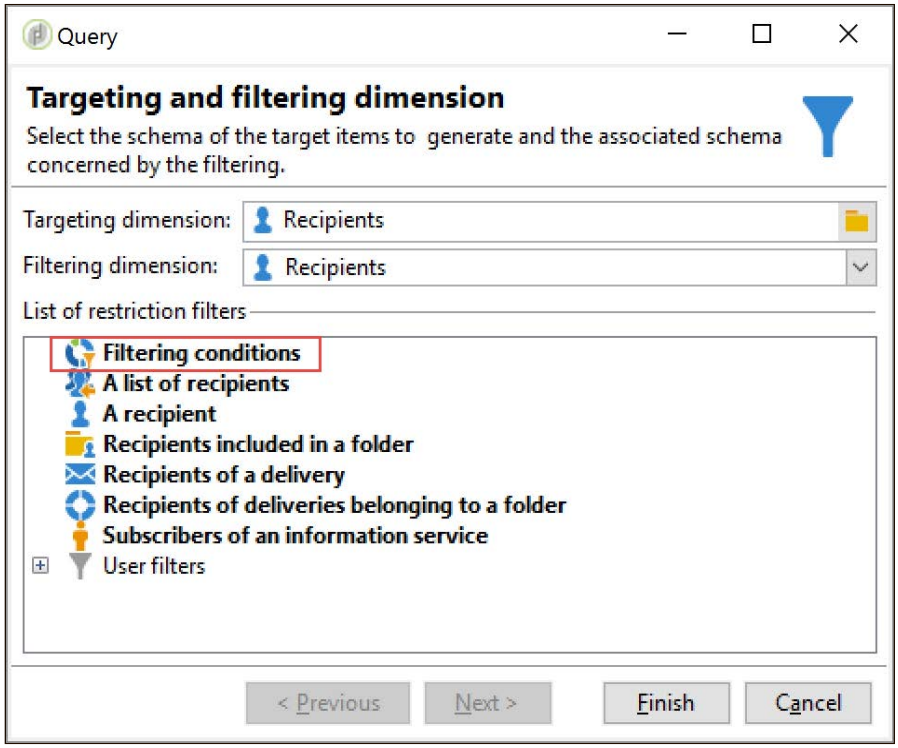


NOTE: If you are using two monitors, the dialog box may appear in the second monitor. If you do not see the dialog box in the first monitor, check the other monitor.

8. In the **Target selection** area, click the **Edit query** link. The **Query** dialog box opens, and displays the fields to select the schema of the target items of the schema and the associated schemas filters related to the filtering.

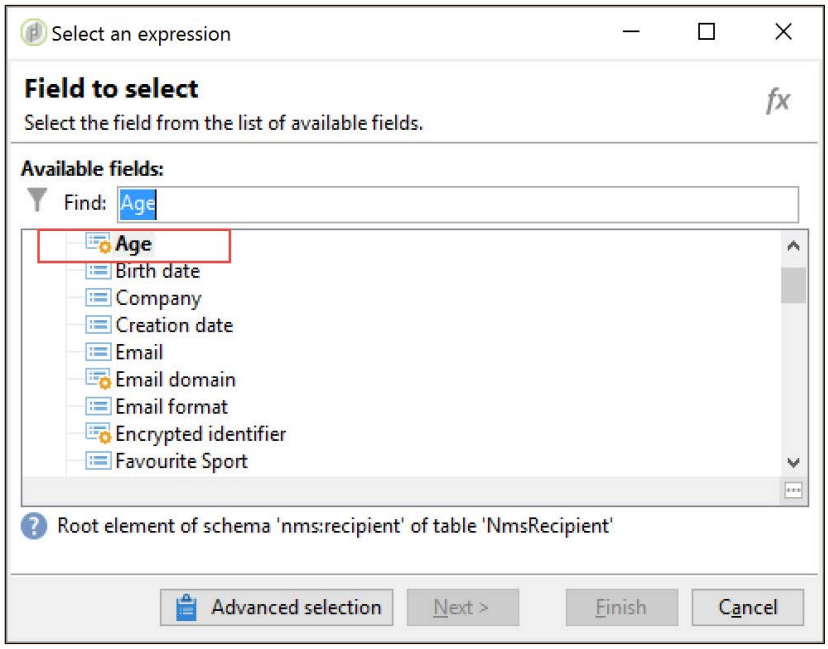


9. Double-click **Filtering conditions**. The **Query** dialog box displays the fields to specify the filtering conditions used to select records.

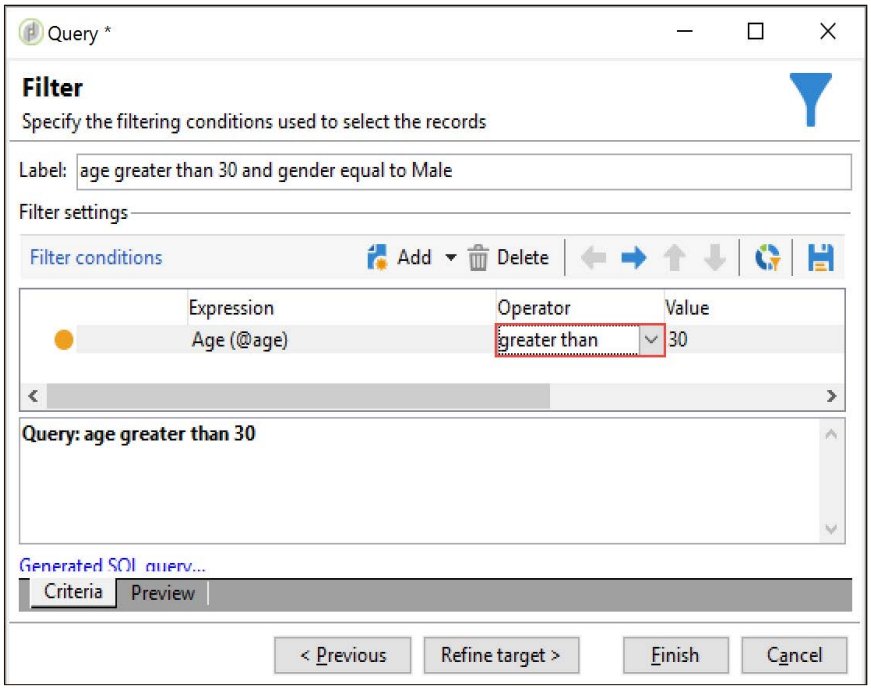


10. In the **Expression** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.

11. In the **Find** field, enter **Age** and double-click **Age (@age)** from the **Available fields**. The expression is added to the field.

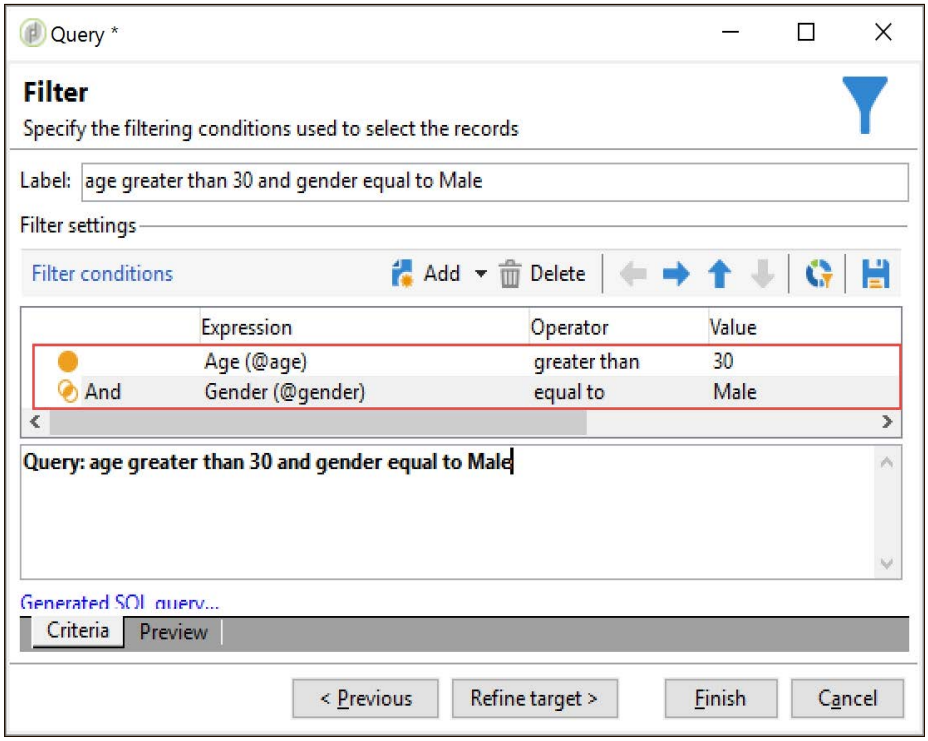


12. On the **Query** dialog box where the expression was added, click the **Operator** field and select **greater than** from the drop-down list.



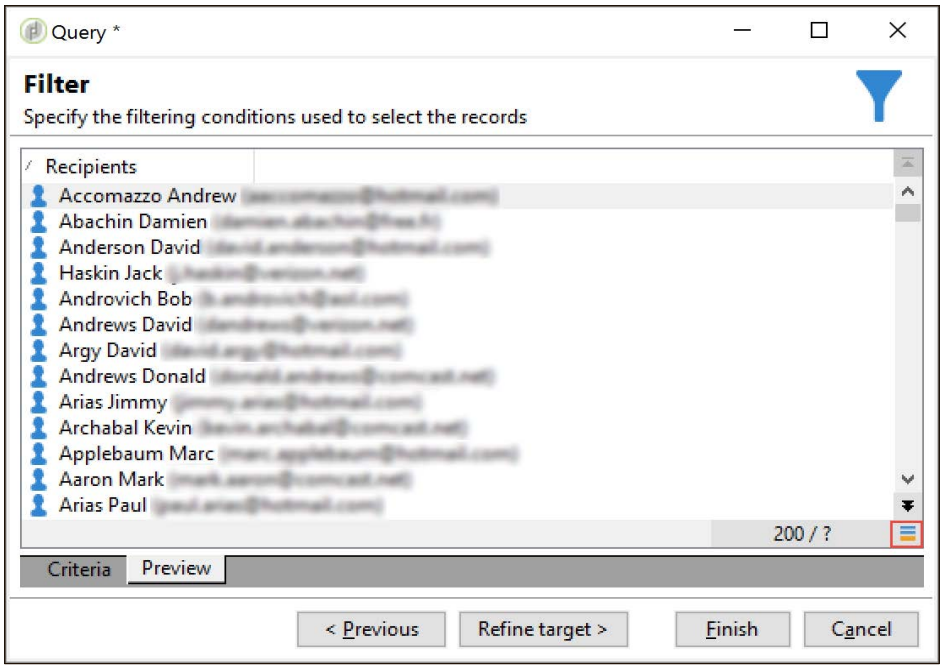
13. Click the **Value** field, and enter **30**.

14. Add another expression for **Gender (@gender) equal to male**. By default, the two expressions are combined with an **And**.



15. Click the **Preview** tab. The query results are displayed.

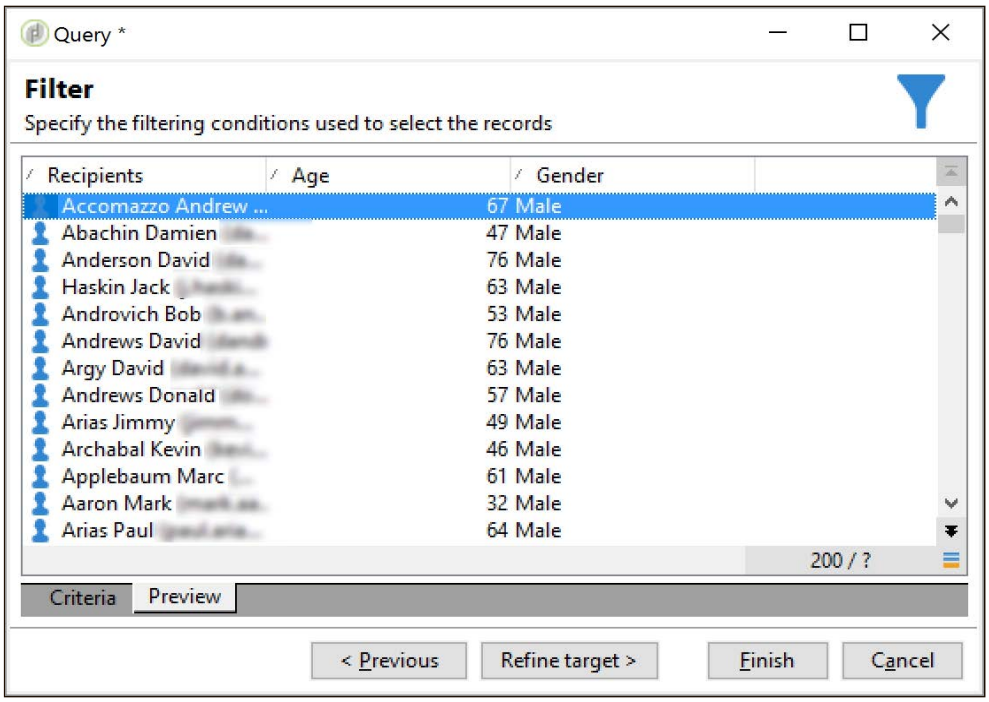
16. Right-click the preview and select **Configure list** or click the **Configure list** icon.



17. Double-click the **Age** and **Gender** columns to add them to **Output columns**.

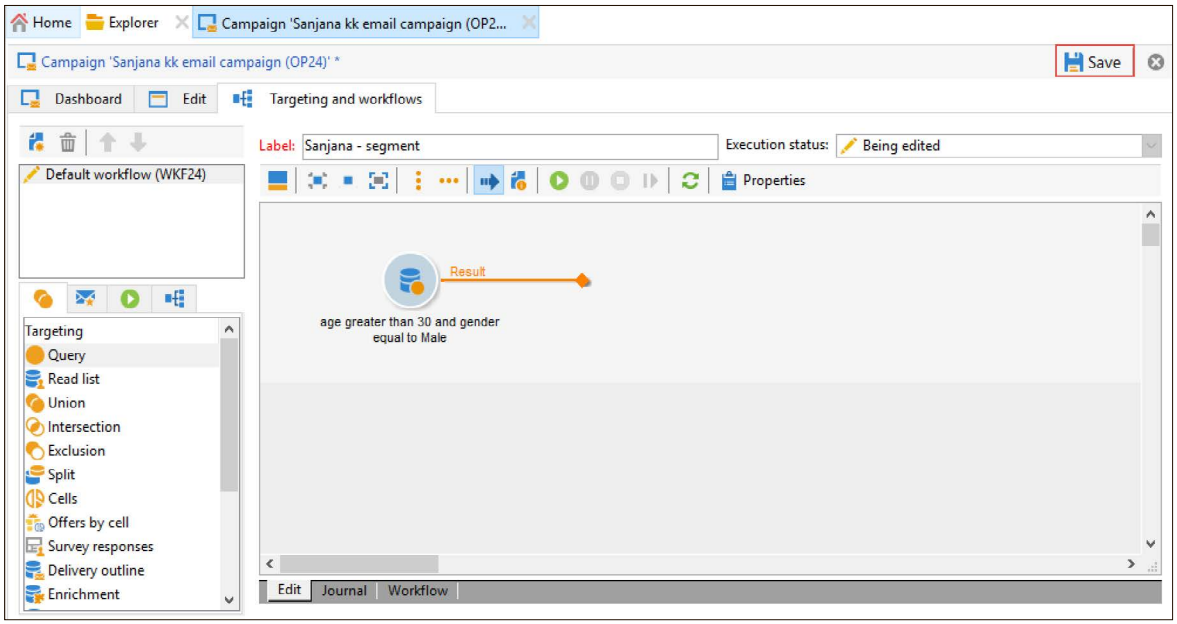
18. Click **Ok**. The **Preview** tab displays the name, age, and gender of the recipients.

19. Validate your query logic by verifying your list now contains only males over 30.

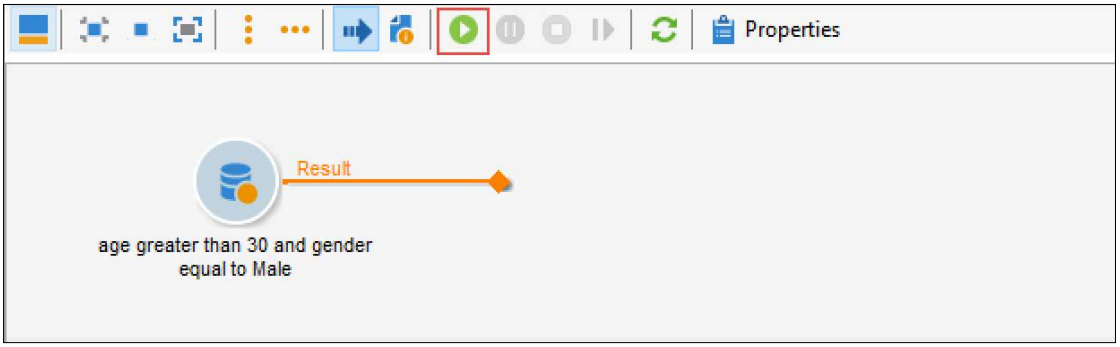


20. Click **Finish,** and click **Ok** to return to the **Targeting and Workflows** tab.

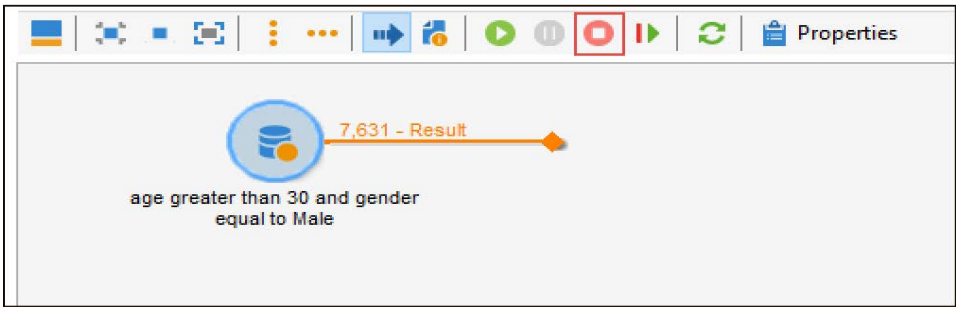
21. Click **Save**. Your workflow is saved.



22. Click the **Start** button to start the workflow. The **Result** will start flashing and show a number indicating the number of recipients.



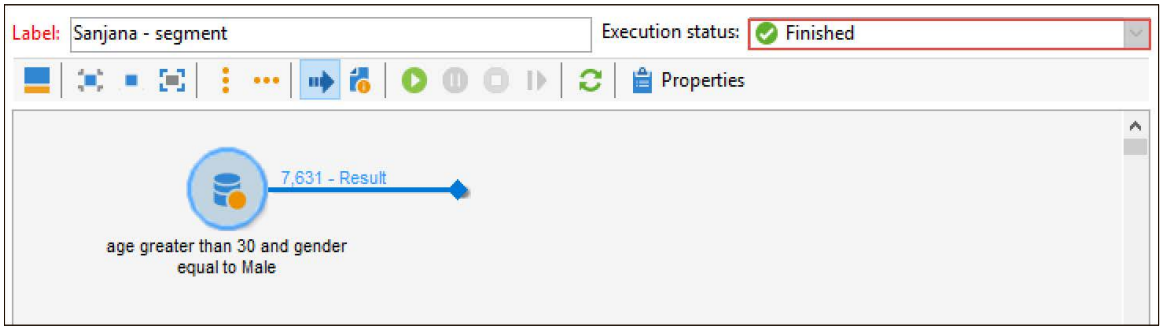
23. Click the **Stop** button. The **Adobe Campaign v7 - Client console** confirmation dialog box is displayed.



TIP: Click the **Age** column to sort the ages of the recipients from youngest to oldest. That way, when you look at the youngest person, you can verify the age is greater than 30 years.

24. Click **Yes** to confirm the dialog box.

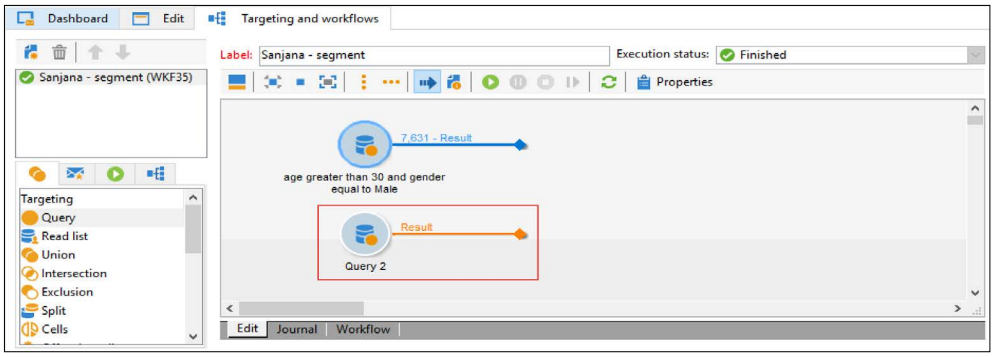
25. Wait for the workflow to go to the finished state. The workflow then moves to the **Finished** state - which is indicated by the non-blinking blue line and resulting number.



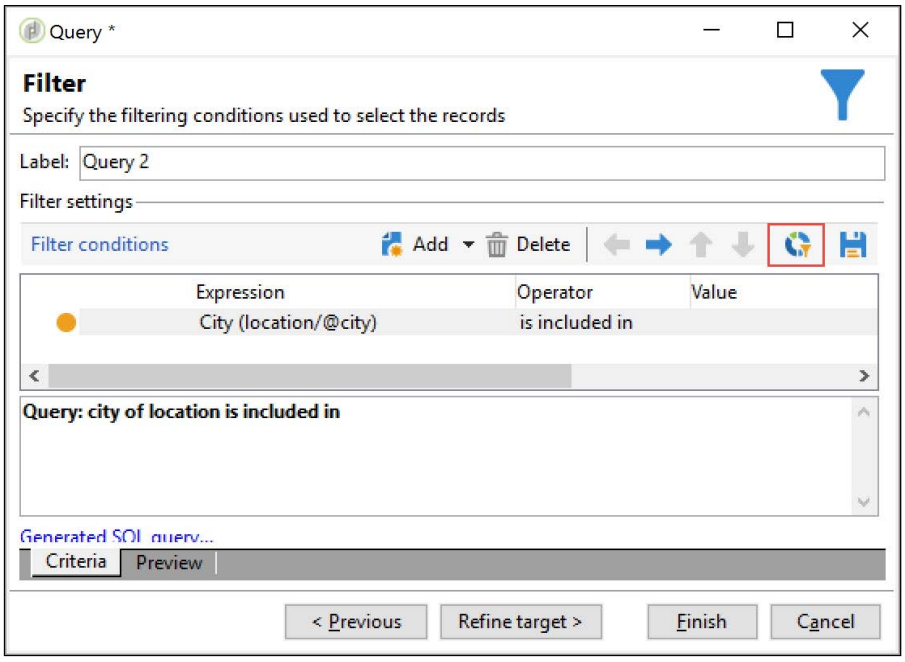
Task 3: Segment the recipient list by using filtering conditions

Use filtering conditions in your workflow to further segment your recipient list to include individuals from certain cities.

1. Drag another **Query** activity to the workflow created in the previous task (Query 2).



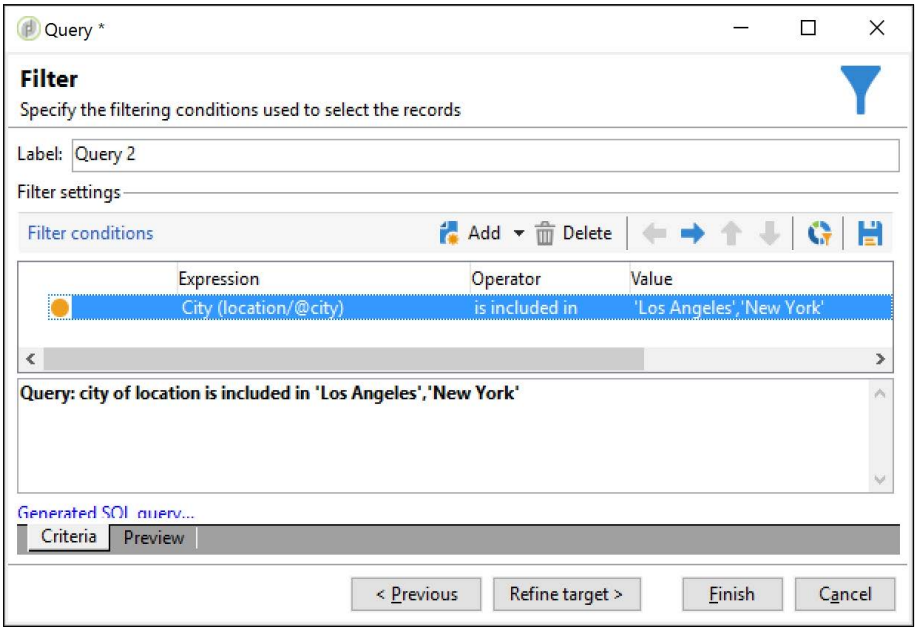
2. Double-click **Query 2**. The **Query** dialog box is displayed.
3. Click **Edit query** to edit the query. The **Query** dialog box displays the fields to select the schema of the target items and the associated schemas' filters.
4. Double-click **Filtering conditions**. The **Query** dialog box displays the fields to specify the filtering conditions used to select records.
5. In the **Expression** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.
6. In the **Find** field, type **City** and press **Enter**, then double-click **City (@city)** from **Available fields**. The expression is added to the field.
7. Click the **Operator** filed and select **is included in** from the drop-down list.
8. Click the **Distribution of values** icon in the upper right.



9. In the **Distribution of values** dialog box, press **CTRL** and select **New York** and **Los Angeles**.

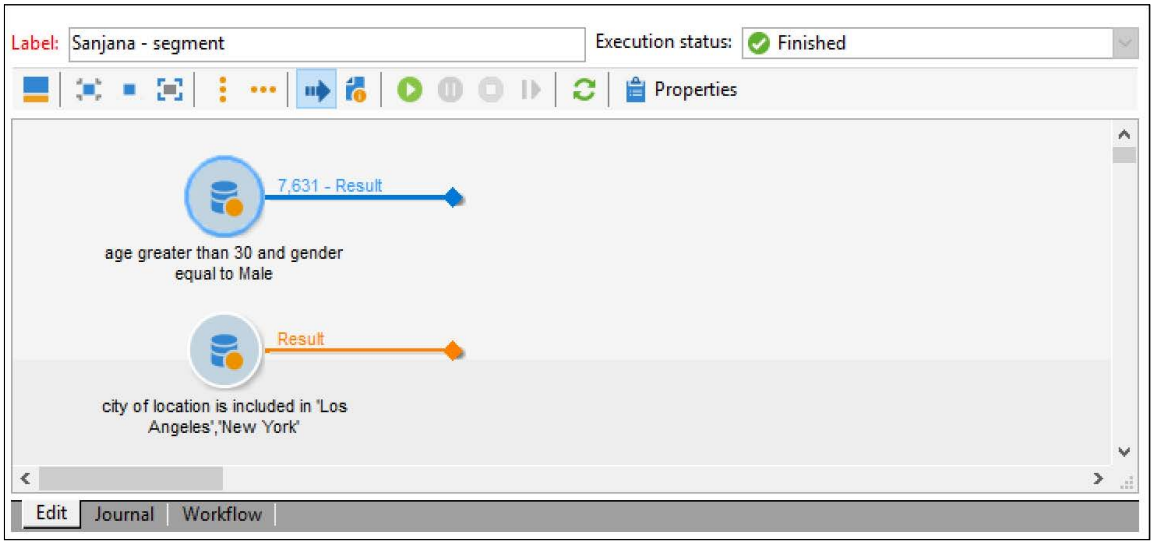
TIP: If you are using a VM client on a Mac, you may need to use **SHIFT + CTRL** to select multiple values.

10. Click **Ok**. The values are added to the **Value** field.



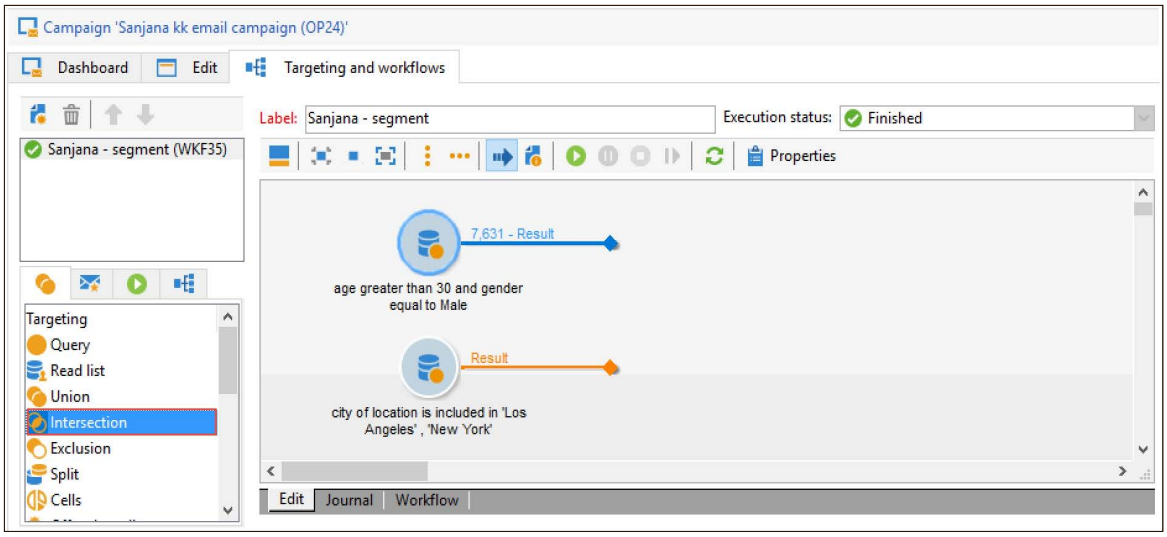
11. Click **Preview** to view the records.

12. Click **Finish** and click **Ok** to go back to the **Targeting and Workflows** tab.

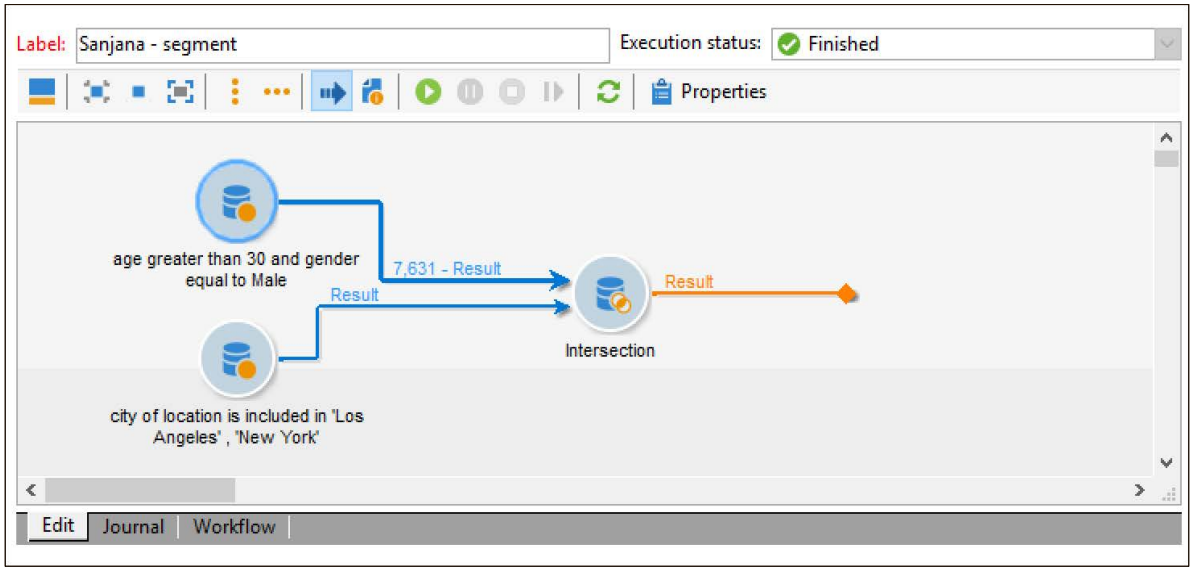


13. Click **Save**. The workflow is saved.

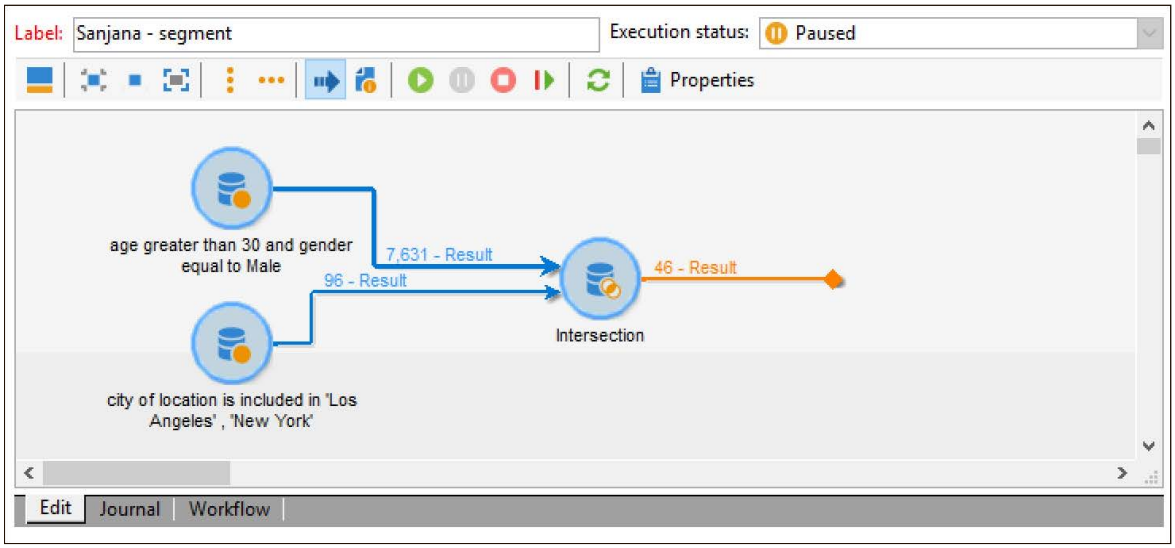
14. Drag an **Intersection** activity onto the workflow diagram.



15. Connect each of the query activities to the **Intersection** activity.



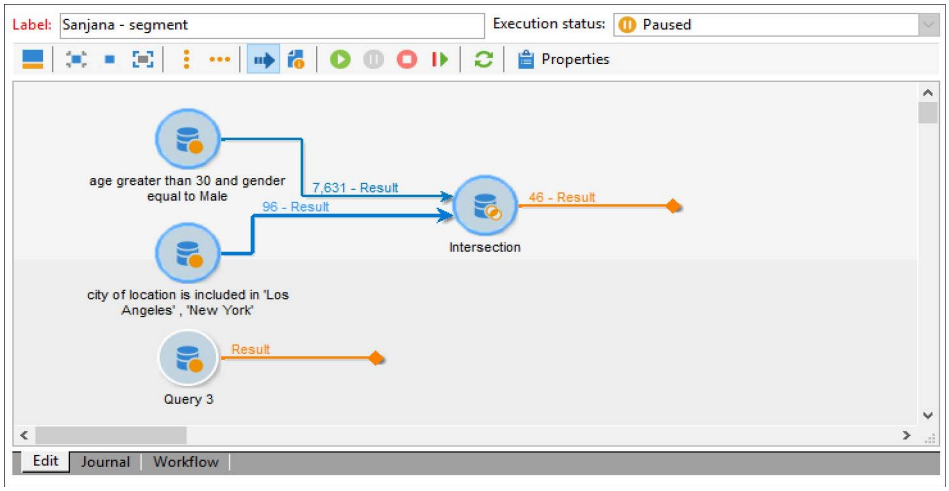
16. Start the workflow by clicking the **Start** button. If your workflow is already running, click the **Restart** button to run the workflow from the beginning. The workflow displays the results.



Task 4: Apply standard exclusions

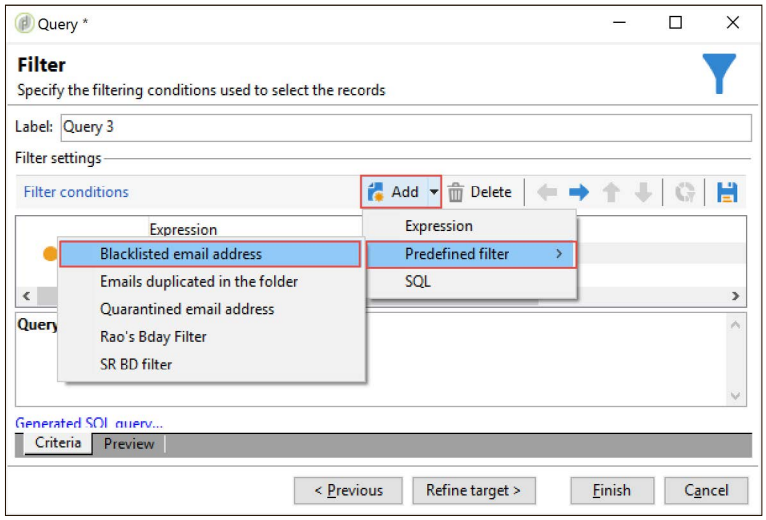
To comply with legal and corporate requirements, and best practices, you must exclude blacklisted recipients and recipients without email addresses.

1. Drag another **Query** activity to the workflow created in the previous task (Query 3).
2. Double-click **Query 3**. The Query dialog box opens.



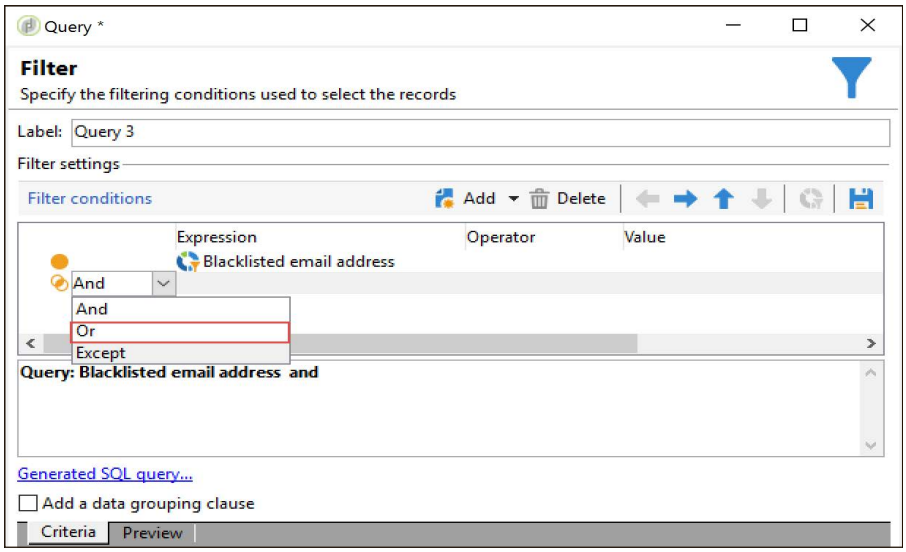
3. Click the **Edit query** link to edit the query. The **Query** dialog box displays the fields to select the schema of the target items and the associated schemas' filters.
4. Double-click **Filtering conditions**. The **Query** dialog box displays the fields to specify the filtering conditions used to select the records.

5. Select **Add** > **Predefined filter** > **Blacklisted email address**. The expression **Blacklisted email address** is added as an attribute.



6. Click **Add** to add another expression.

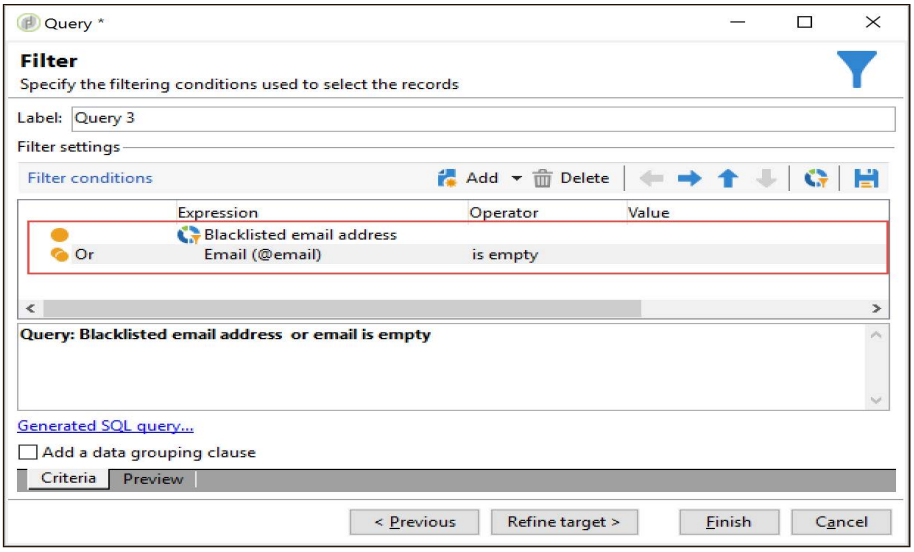
7. Click **And** and select **Or** from the drop-down list.



8. In the **Expression** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.

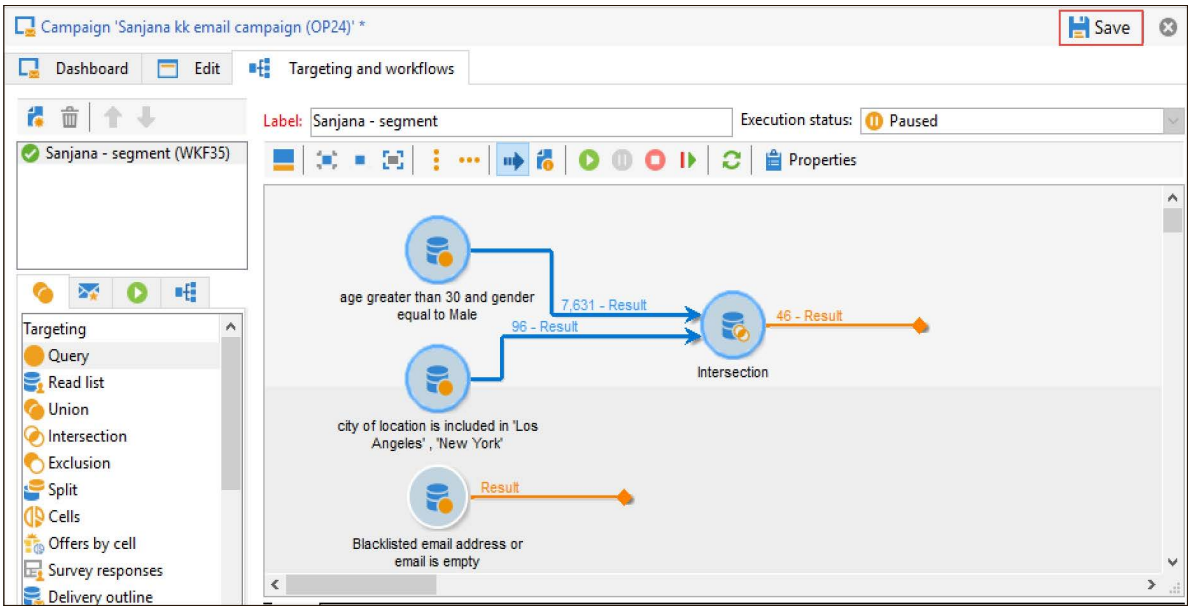
9. In the **Find** field, enter **Email** and press **Enter**. Double-click **Email (@email)** from the **Available fields**. The expression is added to the field.

10. Click the **Operator** field and select **is empty**. Your Query dialog box should look like this:

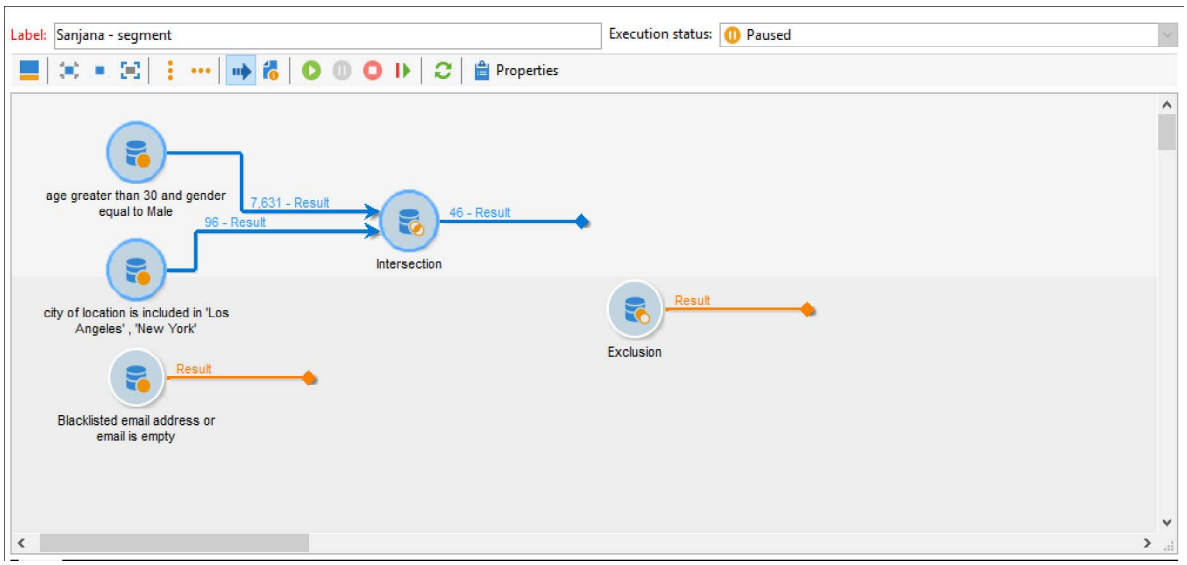


11. Click **Finish** and click **Ok** to go back to the **Targeting and Workflows** tab.

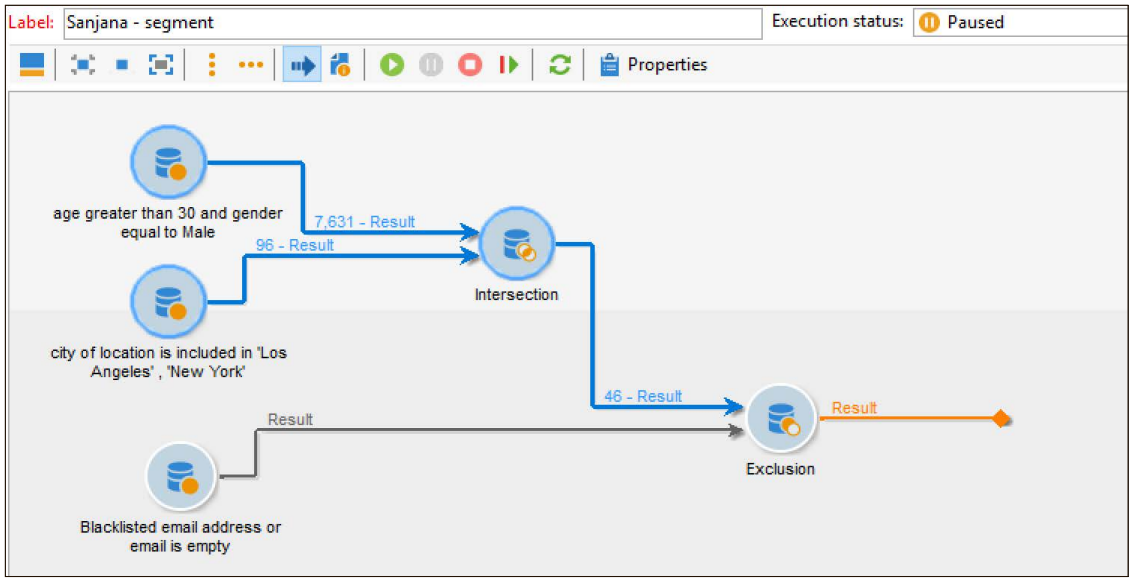
12. Click **Save** to save the query.



13. Drag an **Exclusion** activity onto the transition leaving the **Intersection** activity.

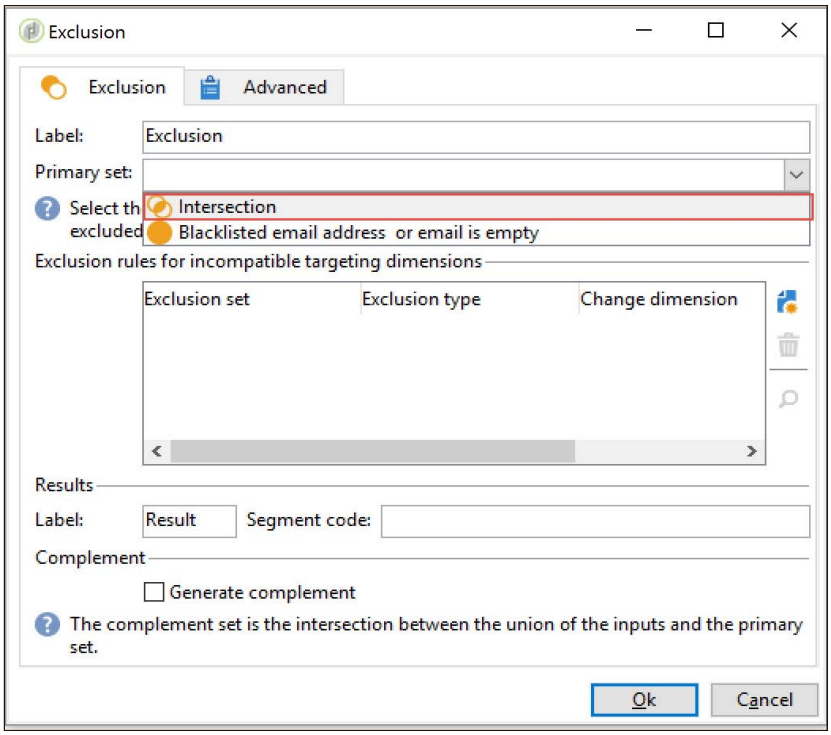


14. Connect the **Blacklisted email address or email is empty query** activity and **Intersection** activity to the **Exclusion** activity.



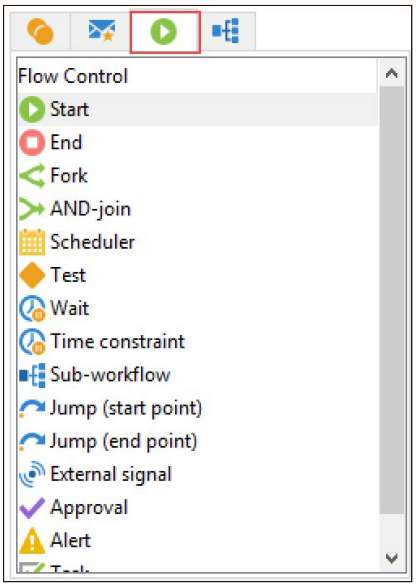
15. Double-click the **Exclusion** activity. The **Exclusion** dialog box displays.

16. In the **Exclusion** dialog box, in the **Primary set** field, select **Intersection** from the drop-down list.

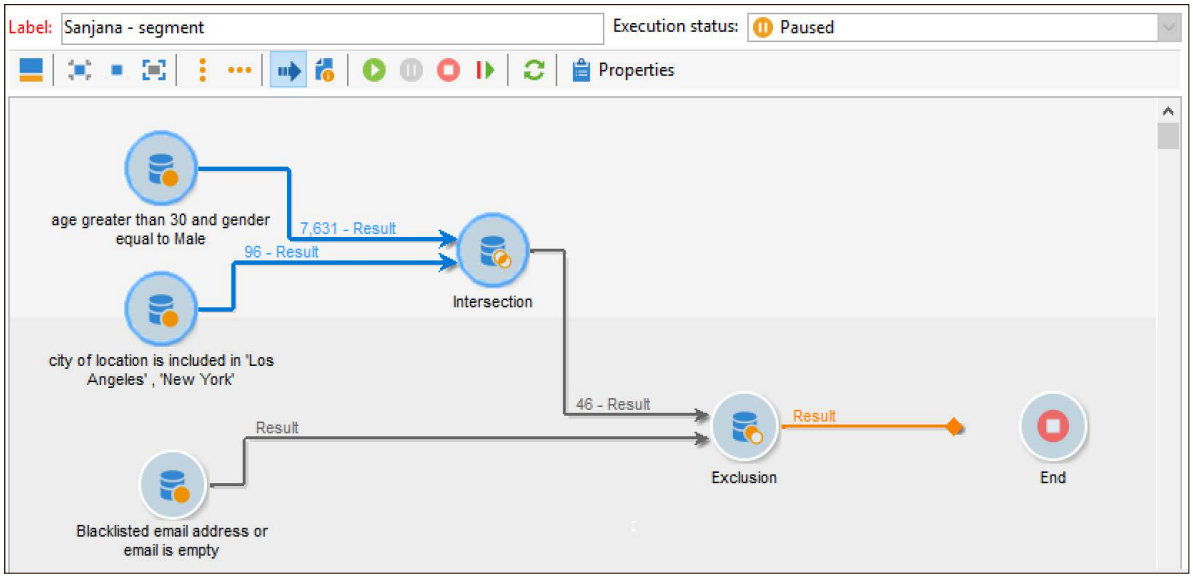


17. Click **Ok** to go back to the **Targeting and Workflows** tab.

18. On the left-side navigation, click the **Flow Control** icon. A list of activities under the **Flow Control** option is displayed, as shown:



19. Drag an **End** activity from the **Flow control** options to the workflow diagram, as shown below:

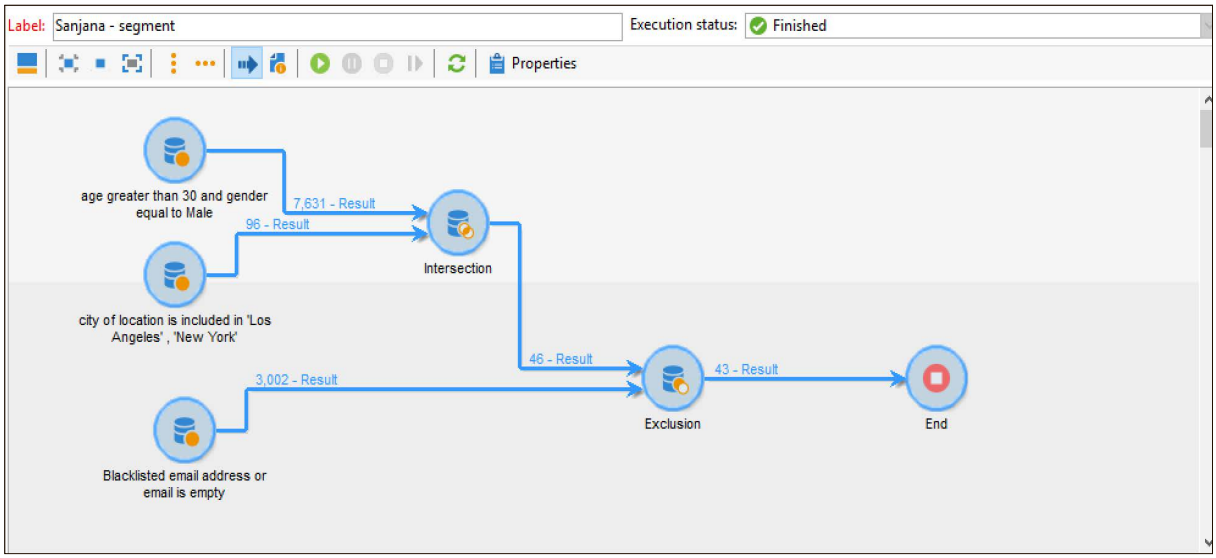


20. Connect the **Exclusion** activity with the **End** activity.

21. Click **Save** to save the workflow.

22. Click the **Restart** button. A confirmation dialog box is displayed.

23. Click **Yes**. The workflow displays the result of the queries.



Preparing Deliveries

Objectives

By the end of this chapter, you will be able to:

- Explain dynamic and personalized campaign content
- Explain the Adobe Campaign integration with Adobe Experience Manager
- Explain the delivery workflow activities
- Explain strategies to improve the deliverability
- Compose and manage email delivery content
- Verify and reduce the spam score

Dynamic Content and Personalization

Adobe Campaign v7 enables you to create a campaign and create deliveries within the campaign. Email and direct mail are the most common format for deliveries. The other formats include SMS and social. In Adobe Campaign, you can make your communication with your customers more effective by having dynamic and personalized content.

Dynamic content makes marketing messages up-to-date, and personalized content makes it more appealing to a prospects and customers. The content should be relevant for the recipient which can lead to more engagement. You should make it conditional based on what you know about your customer's interests. You can gather information about your recipients, and then use that information to create dynamic and personalized content that is interesting and relevant to your customer.

In Adobe Campaign, you can personalize marketing messages in many ways based on the criteria derived from recipient profiles. For email deliveries, you can define the elements and personalization conditions of a delivery directly in JavaScript.

Integration with Adobe Experience Manager

You can integrate Adobe Campaign with Adobe Experience Manager to manage the content of your email deliveries. You can create and design the delivery content in Adobe Experience Manager and export it to Adobe Campaign. In this way, you can use Adobe Experience Mangers authoring features to enhance the design of your delivery content.

In Adobe Experience Manager, you can create online forms. You can map the fields in these forms to fields in Adobe Campaign. You can also create and manage new contacts and subscriptions in Adobe Experience Manager and export them to Adobe Campaign. You can also directly insert assets from your Adobe Experience Manager Assets library while editing an email or a landing page in Adobe Campaign. Adobe Campaign is compatible with Adobe Experience Manager 6.1, 6.2, and 6.3.

Editing Deliveries

Adobe Campaign enables you to either create or upload your delivery content, edit your deliveries, add links, and preview the email content. You can preview the content and see how it renders. In the delivery process, there is an iterative development cycle that includes steps such as create the content, preview the content, edit the content, and preview it again to ensure sure it is rendering properly.

You can generate HTML content and the text content to show how the delivery will appear to the recipient. It is necessary to provide both HTML and text formats of your marketing message to reach different customers.

Delivery Workflow Activities

A campaign delivery workflow can have multiple activities. The following table describes these activities:

Workflow Activity	Description
Delivery	Helps you create a delivery action. It can be constructed using input elements.
Delivery control	Helps you start, pause, or stop a delivery. This activity can be the delivery specified in the transition, a delivery selected explicitly, or a delivery calculated by a script.
Continuous delivery	Helps you add new recipients to an existing delivery. This activity helps eliminate the need to create a new delivery each time.
Recurring delivery	Helps you configure a delivery template occurrence specific to a campaign.
Cross-channel delivery	Helps you create a delivery specific to a channel, such as email, mobile, and direct mail. You can specify the template on which you want to base your delivery and its content.

Reducing Spam Score and Improving Deliverability

Email deliverability refers to the set of characteristics that determine a message's ability to reach its destination through a personal e-mail address, within a short time, and with the expected quality in terms of content and format. The deliverability rate is the number of sent emails that were successfully delivered to recipients.

In Adobe Campaign, there are four checkpoints to ensure the content/message passes the spam filters. They are:

- Data quality management: You need to ensure the quality of recipient lists and ensure it is valid and relevant for the message.
- Content quality management: You need to ensure the quality of the content in terms of relevance.
- Sending infrastructure: You need to use built-in features in Adobe Campaign to manage deliverability.
- Reputation monitoring: You need to monitor your reputation on an ongoing basis by getting in touch with the deliverability team.

Exercise 5 – Prepare deliveries

In this exercise, you will create an email campaign using the opEmail template and send a proof. Your email content must include:

- Personalization fields
- Compelling subject line
- Content in the body
- Unsubscribe and mirror page links
- Spam score of 2.0 or less

Task 1: Create a campaign to support the email delivery

Create a campaign to support your email delivery based on a template that includes a basic delivery workflow.

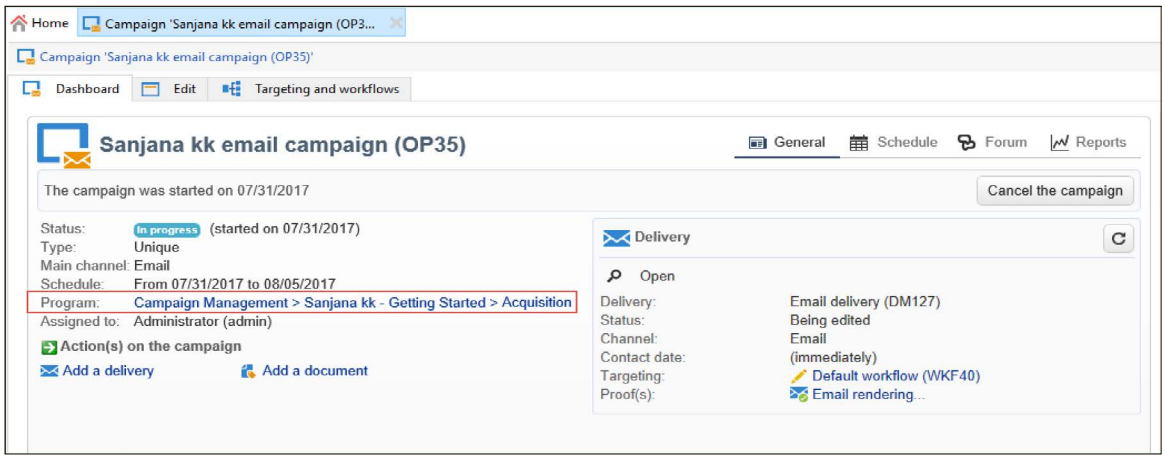
1. In the **Explorer** tree view, click **Campaign Management** and select the **Acquisition** program you created.
2. In the list view, click the **New** icon. The **New marketing campaign** dialog box opens.
3. In the **New marketing campaign** dialog box:
   a. In the **Template** field, click the drop-down arrow and select the **New email campaign (opEmail)**.
   b. In the **Label** field, enter **<Your first name> <Your last name> email campaign**. For example: **John Smith email campaign**
   c. In the **Main channel** field, select **Email.**
   d. Keep the default start date and end date, and leave the description as is.

NOTE: If you cannot find the **New email campaign (opEmail)** template in the **Template** field, click the folder icon in the **Template** field. The **Please select a Campaigns document** dialog box opens. In the dialog box, go to the **Campaigns** section and select the **New Email Campaign (opEmail)** template. If the template is not displayed in the **Campaigns** section, click the folder icon in the folder field, click **Resources** > **Templates** > **Campaigns templates**, and click **Ok**. The template will be displayed in the **Campaigns** section of the **Please select a Campaigns document** dialog box.

TIP: You can also create a campaign by using the Dashboard. On the **Home** page, by clicking the **Campaigns** universe> **Create** > **A campaign**. The **New marketing campaign** dialog box opens. In the **Template** field, select the **New Email Campaign (opEmail)** template. In the **Label** field, enter **<Your first name> <Your last name> email campaign**. In the **Program** field, click the drop-down arrow and select **Acquisition**. In the **Main channel** field, select **Email** and keep the default start date and end date and click **Ok**.

4. Double-click the campaign. Your newly created campaign opens in its own workspace.

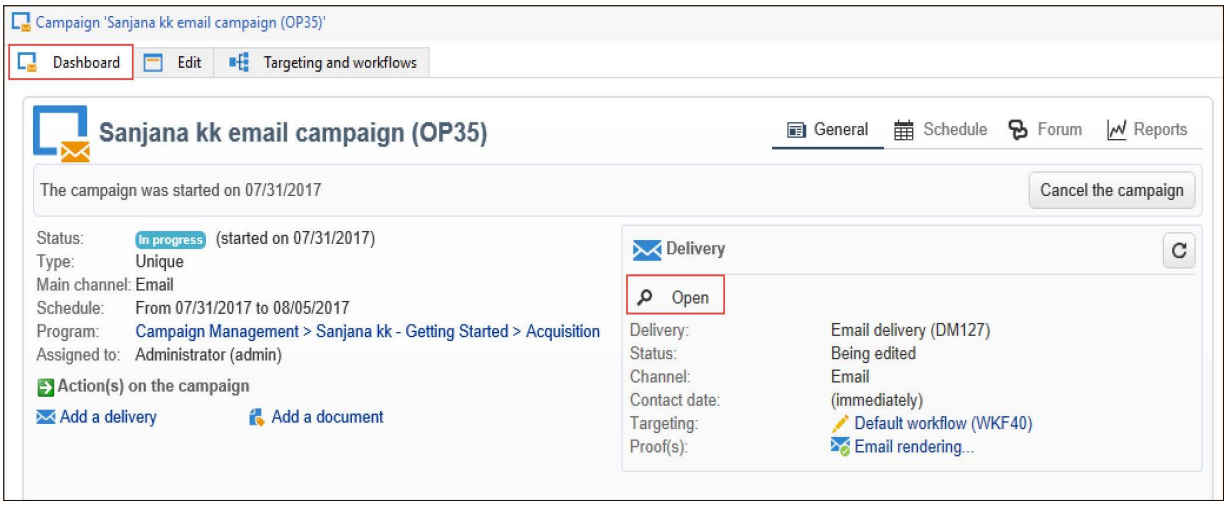
5. Ensure the path of the plan and program mentioned in the newly created campaign is correct.



Task 2: Compose delivery content

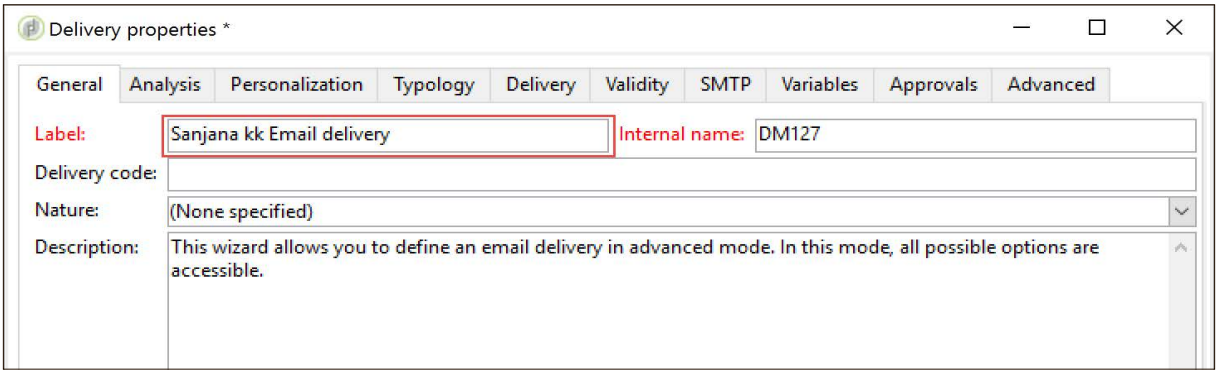
Compose personalized email content by including personalization fields.

1. Open the campaign you created in the Task 1 of this exercise.
2. Click the **Dashboard** tab, go to the **Delivery** section and click **Open**. The Delivery Email delivery dialog box opens.

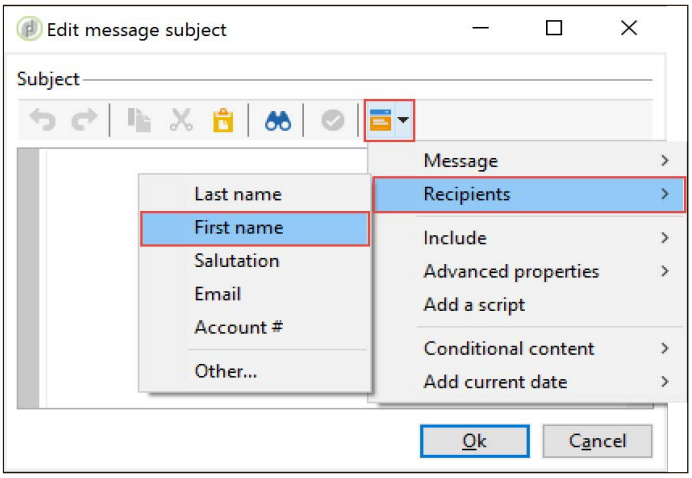


3. In the Delivery Email delivery dialog box, click **Properties**.

4. In the Label field, enter your **<first name and last name> Email delivery**.

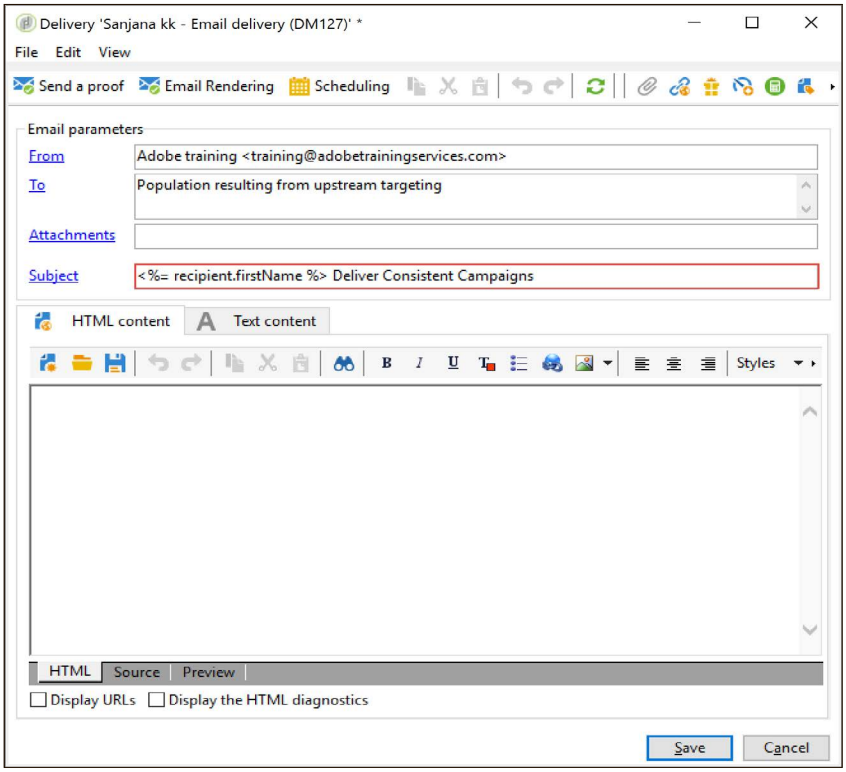


5. Click **Ok** to go back to Delivery Email delivery dialog box.
6. In the Delivery Email delivery dialog box, click the **Subject** link to include a personalized subject line. The **Edit message subject** dialog box opens.
7. In the **Edit message subject** dialog box, click the **Insert content** drop-down arrow and select **Recipients** > **First name**.

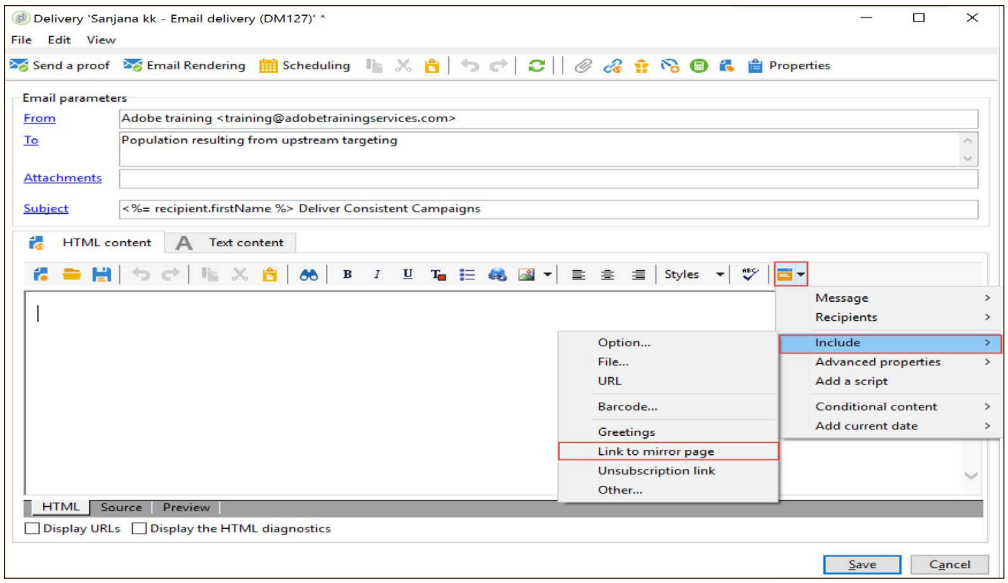


8. Click **Ok**.

9. Enter the rest of the subject line after the **<% ... %>** in the **Subject** field.



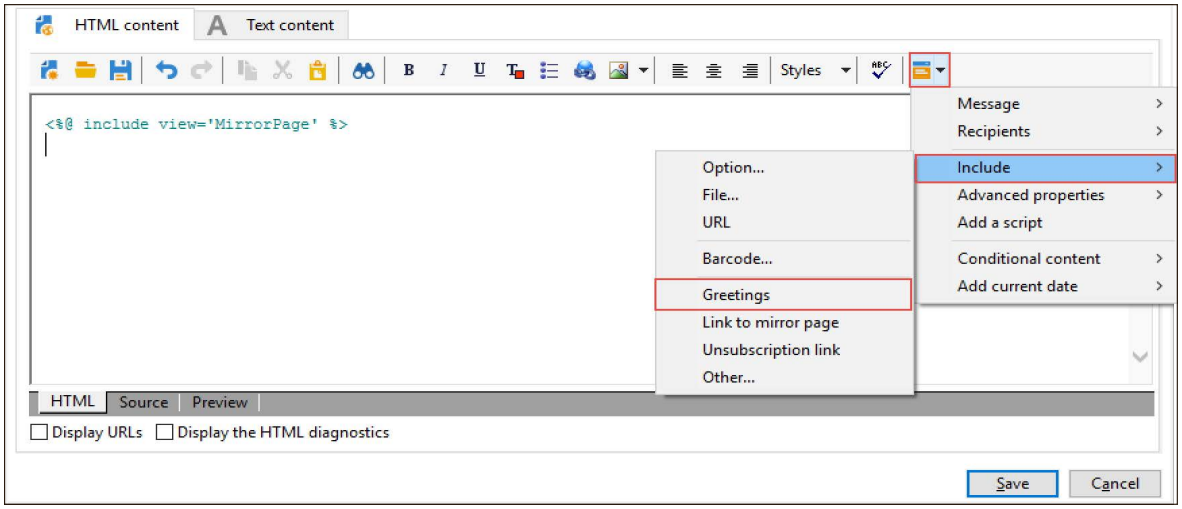
10. Inside the **HTML content** section, click the **Insert content** drop-down arrow and select **Include** > **Link to mirror image**. The link is added to the mail body in the **HTML content** section.



11. Place the cursor at the end of the line containing the link to the mirror page and press **Shift+Enter**.

TIP: You use **Shift+Enter** to ensure line breaks are not inserted into the email content. Often, rendering in certain email programs will add additional unwanted "spaces" in between lines if you just press **Enter**. If you are using a VM client on a Mac, you may need to use **Shift+Ctrl** to select multiple values.

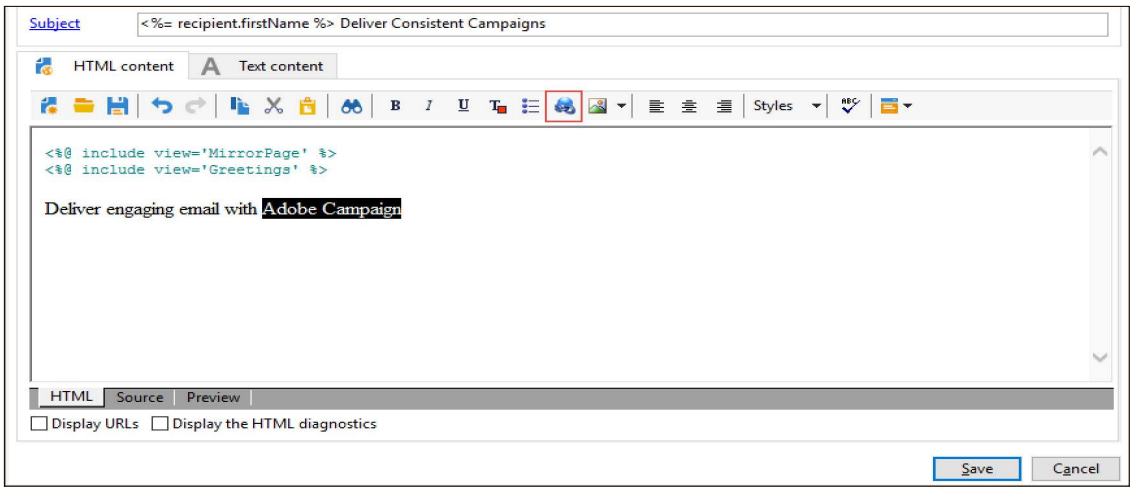
12. Insert another personalization field to include greetings. Inside the **HTML content** section, click the Insert content drop-down arrow and select **Include** > **Greetings**.



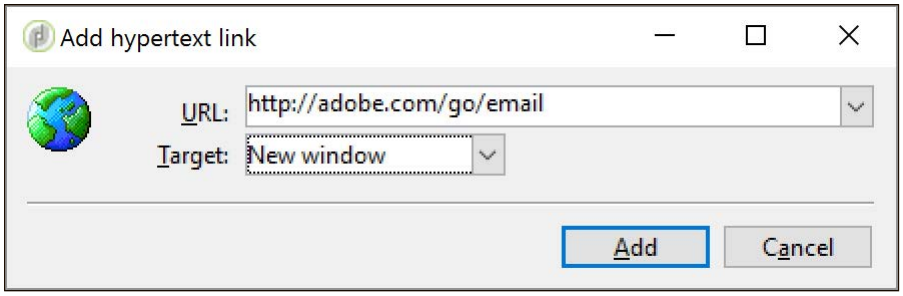
13. Place the cursor at the end of the line containing the greetings and press **Enter**.

14. Enter the message body of your choice and include a compelling text for a link.

15. Select the link text and click the **Insert hypertext** link button. The **Add hypertext link** dialog box opens.

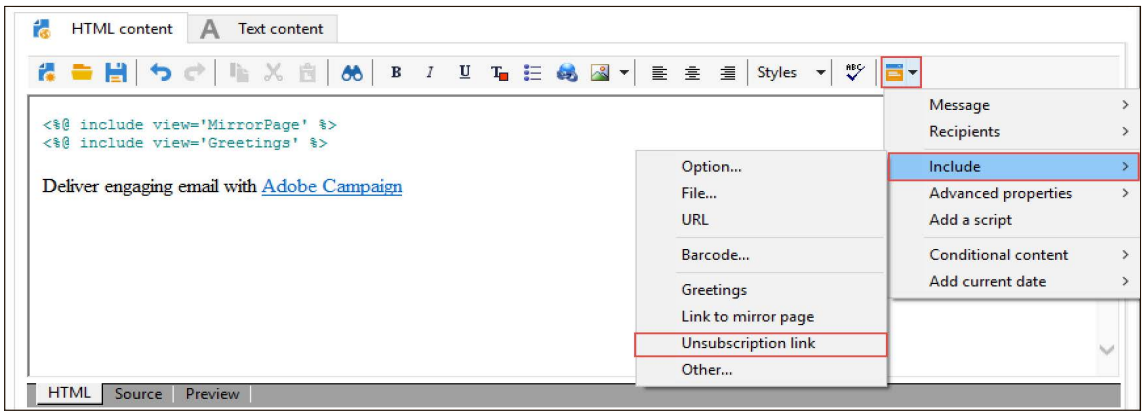


16. In the **Add hypertext link** dialog box, in the **URL** field, enter a URL. In the **Target** field, click the drop-down arrow and select **New Window**.

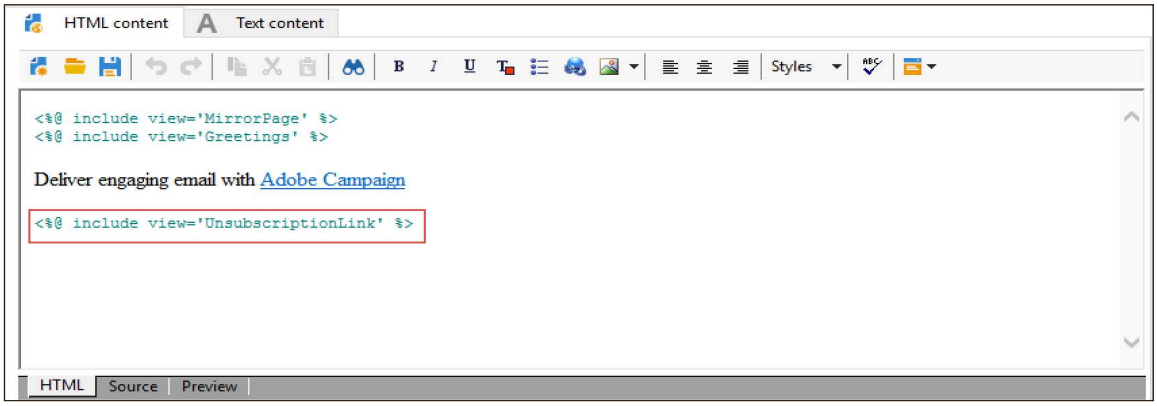


17. Place the cursor at the end of the message body and press **Enter**.

18. To include an unsubscription link at the bottom of the email, click the **Insert content** drop-down arrow and select **Include** > **Unsubscription link**.



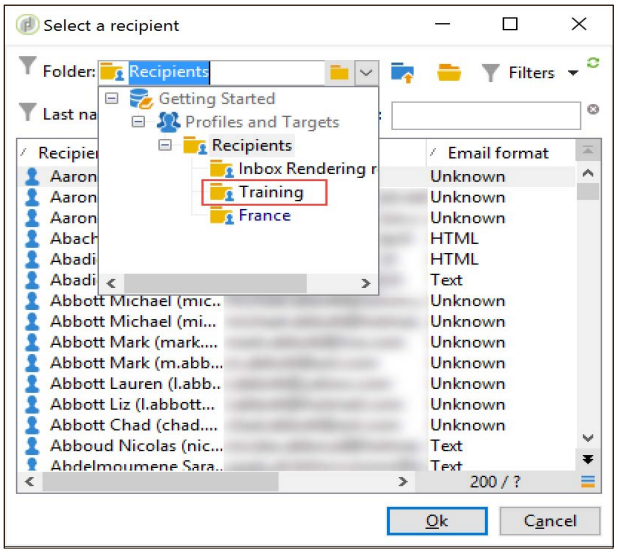
19. Notice how the unsubscription link is added to the email body.



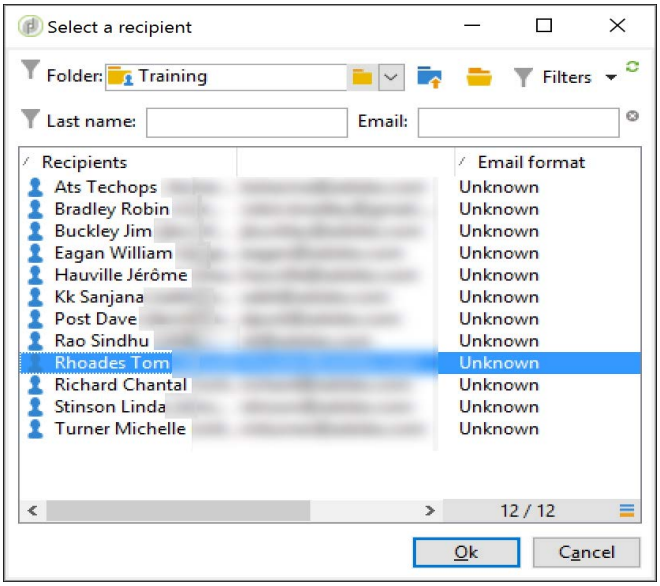
20. Click **Preview**.

21. Click **Test personalization** > **Recipients**. The **Select a recipient** dialog box opens.

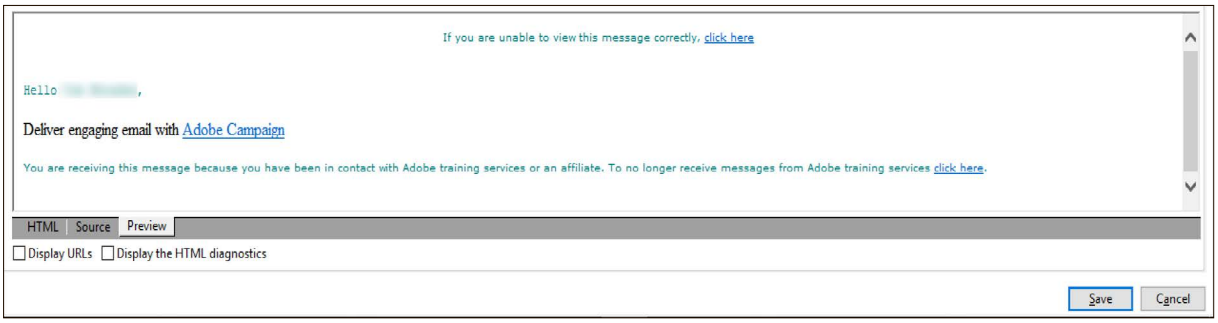
22.In the **Select a recipient** dialog box, in the **Folder** field, click the drop-down arrow and select **Recipients** > **Training**.



23.Double-click any recipient from the list of recipient details.



24. Verify the preview displays the name of the recipient you selected.



25. Click **Save**. The email content is saved.

NOTE: To save your content without closing the dialog box, on the toolbar, select **File** > **Save.** This allows you to save your changes and keep working.

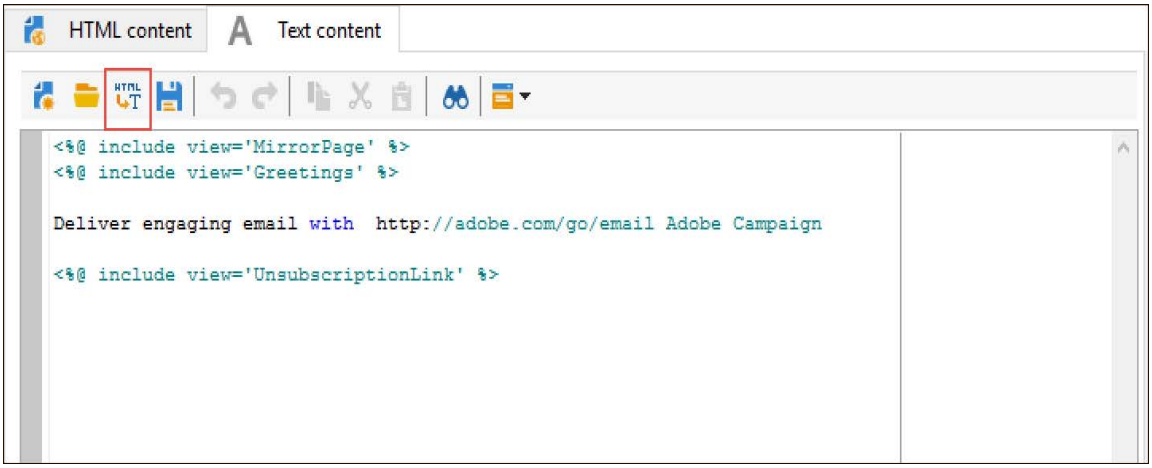
Task 3: Reduce the spam score

Add an image to your email content and improve deliverability by reducing its spam score.

1. Open the email campaign you saved in the previous task.
2. Click the **HTML content** tab.
3. To insert and image to the email content:
   a. Place the cursor *after* the web link and press **Shift**+**Enter**.
   b. Click the **Insert image** button and select **From the library**, as shown below. The **Select an image from the library** dialog box opens.

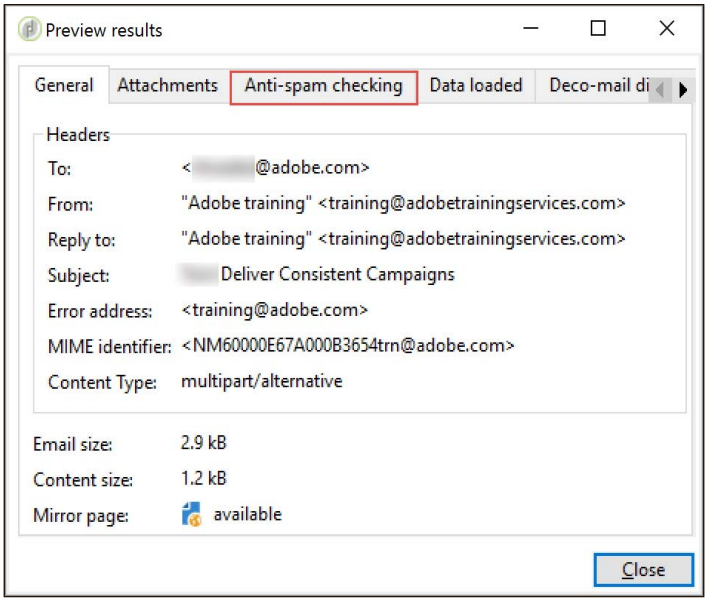
   c. In the **Select an image from the library** dialog box, select an image. The image is added in the mail body.

4. To generate a text version of the mail:
   a. Click the **Text content** tab.
   b. Click the **Import HTML** button to import the existing content from the HTML to text format.

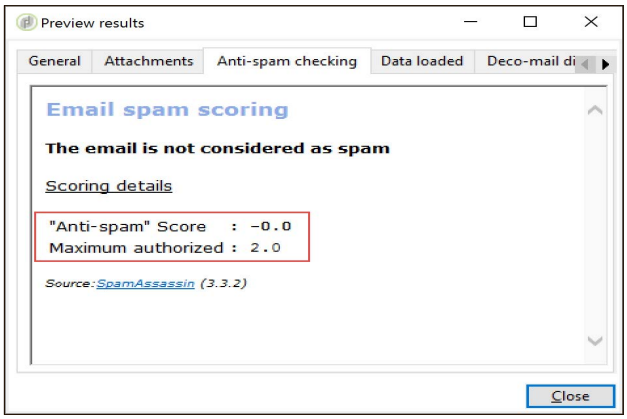


c. Clean up your message content as necessary, mostly by editing the line containing your message body. You can rearrange the text and link.

5. Preview the content on the **HTML content** tab and **Text content** tab to ensure the content is correct.
6. Click the **Test personalization** drop-down arrow and select a recipient.
7. Click the **More** link on the **HTML content** tab or the **Text content** tab. The **Preview results** dialog box opens.
8. In the **Preview results** dialog box, click the **Anti-spam checking** tab.

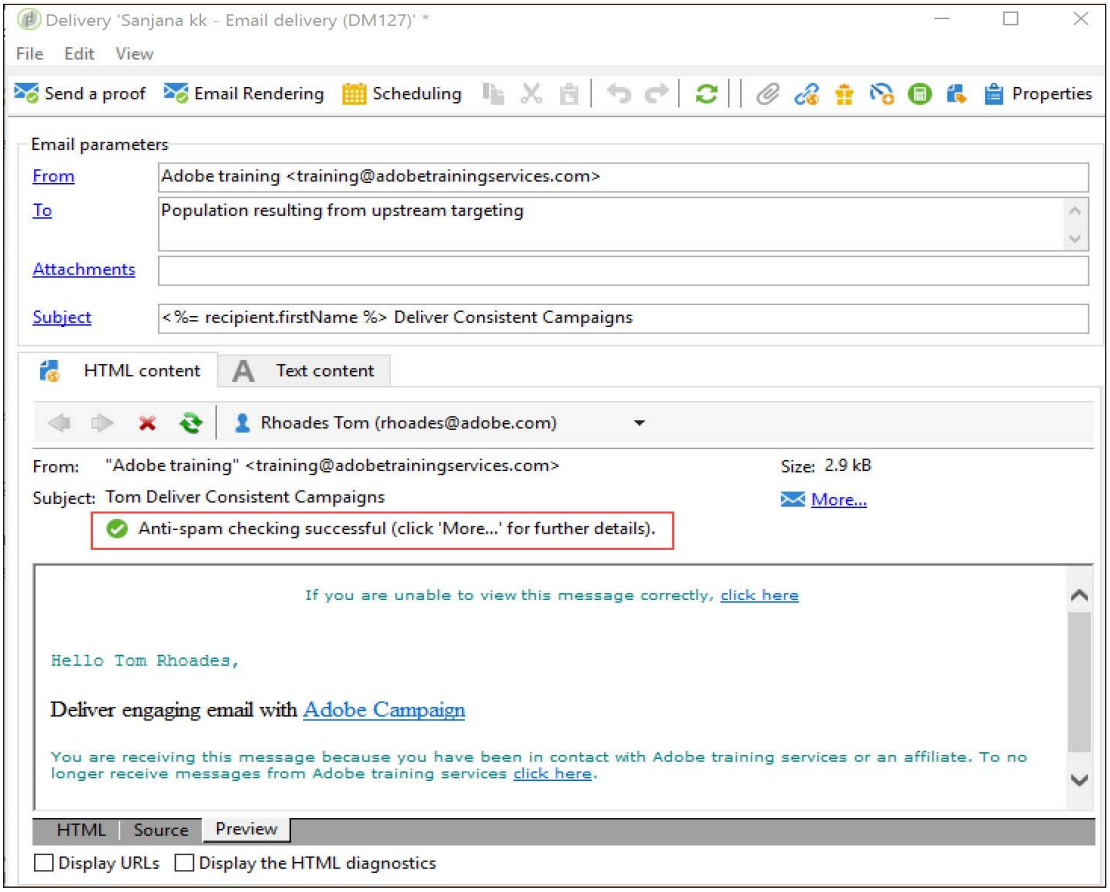


9. Examine the anti-spam score.



An anti-spam score above 2.0 indicates that either the HTML_IMAGE_ONLY rule or the HTML_IMAGE_RATIO rule is violated. If this score is less than 2.0, no rules are violated. You can add text to the HTML content to reduce the score.

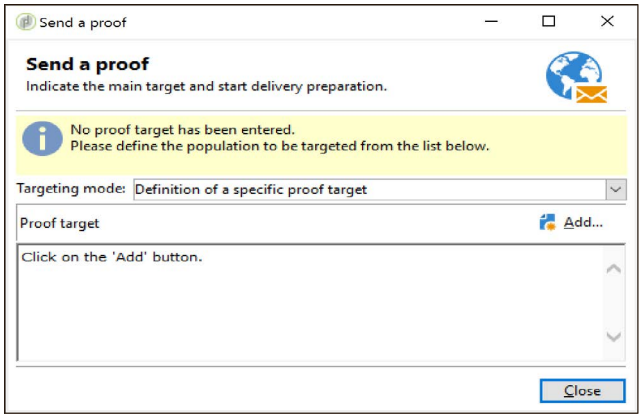
10. Click **Close** to go back to the **Delivery Email delivery** dialog box. This dialog box displays a message indicating the anti-spam checking is successful:



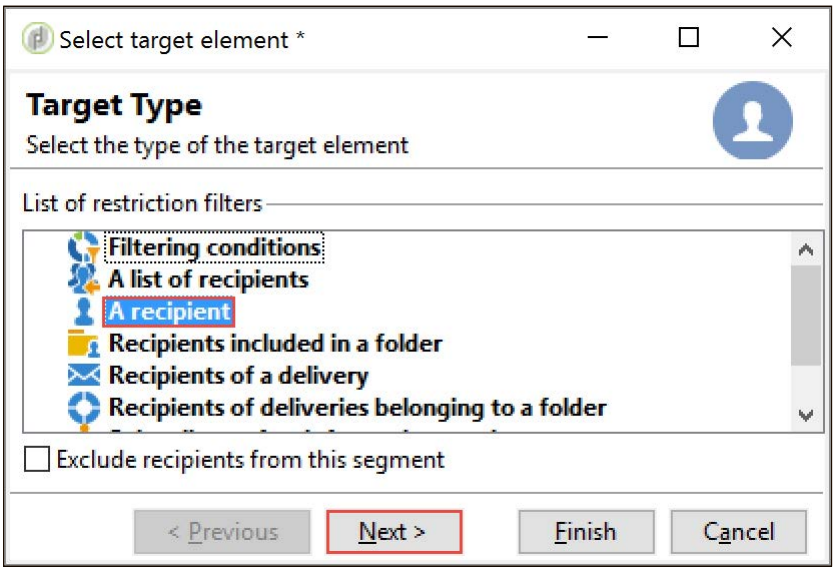
Task 4: Send a proof

Send a proof of the email campaign by adding a recipient.

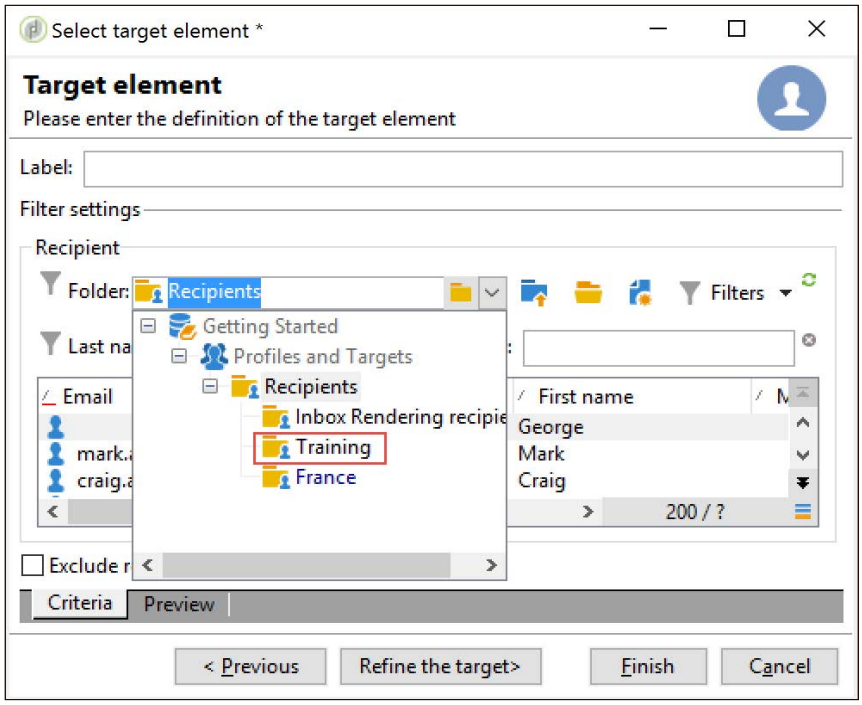
1. In the Delivery Email delivery dialog box, click **Send a Proof**. The **Send a Proof** dialog box is displayed, as shown below:



2. In the **Send a Proof** dialog box, click **Add** to add the proof target. The **Select target element** dialog box opens.
3. In the **Select target element** dialog box, select **A recipient** for the target and then click **Next**.

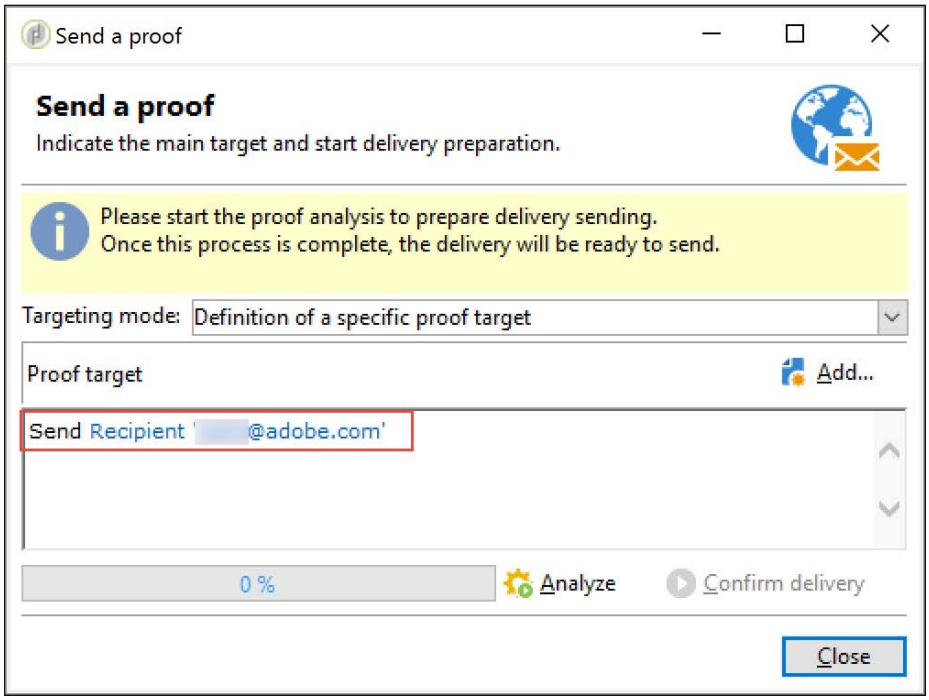


4. In the **Select target element** dialog box, you need to enter the definition of the target element. In the **Folder** field, click the drop-down arrow and select the **Training** folder you created.

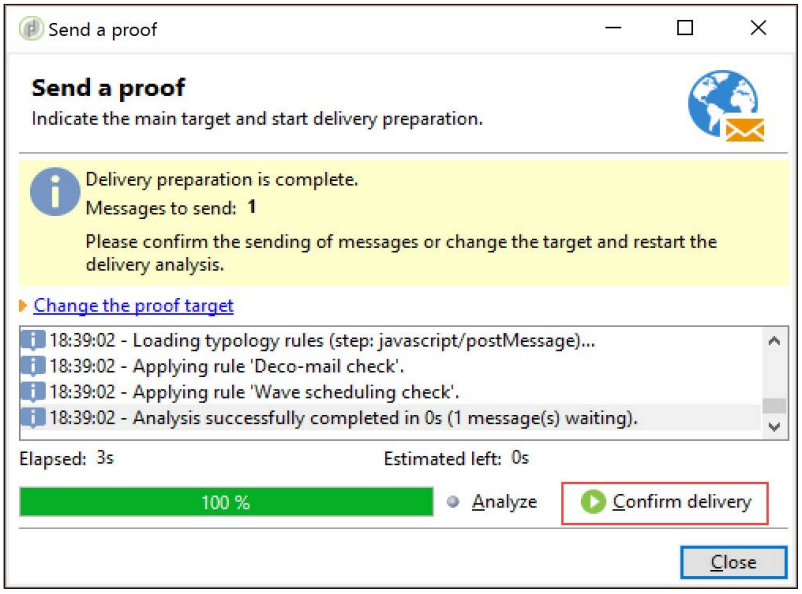


NOTE: If you do not select a recipient in the **Training** subfolder under the **Recipients** folder, your proof will not be sent because there is a typology rule that prevents sending to recipients in the **Recipients** folder.

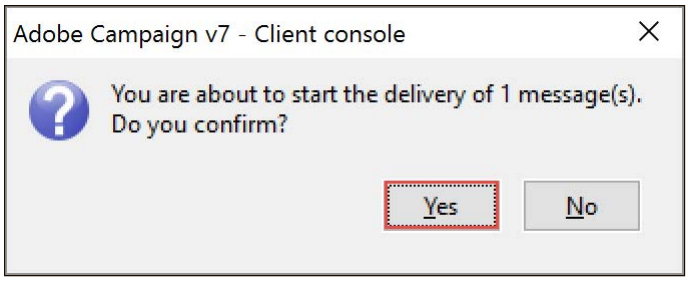
5. In the recipient details, select your own record.
6. Click **Finish**. Your records are updated in the **Send a Proof** dialog box.



7. Click **Analyze**. The proof analysis starts and prepares the delivery.
8. Click **Confirm delivery**. A confirmation dialog box is displayed:



9. Click **Yes** to confirm the delivery.



The **Send a proof** dialog box indicates the delivery has started. The recipient you added will receive your proof email shortly.

10. Click **Close**.

Executing Campaigns

Objectives

By the end of this chapter, you will be able to:

- Explain the processes involved in sending an email delivery
- Send a delivery
- Track a delivery
- Execute a recurring campaign
- Execute a retargeting campaign

Sending a Delivery: Process

The process of sending a delivery involves starting the workflow, analyzing and confirming the delivery, and monitoring the progress.

If approvals were set up for the campaign, the workflow will go through those steps. Each time the workflow reaches an approval step, it will stop until that step is approved.

The final checkpoint before sending the delivery is to view the analysis results and confirm the delivery. If you are satisfied with the analysis results, confirm the delivery. Otherwise, fix the errors, and rerun the workflow.

You can cancel or stop the delivery prior to confirming analysis or after confirming. After the analysis phase is completed, you will see the option to cancel.

WARNING: You should cancel the delivery only when you decide not to send the campaign. This is an irreversible action, and you will not be able to execute this campaign again.

You can also pause and restart an in-progress delivery. The option to stop the delivery is available only after you confirm the delivery. If you know you do not want to send the delivery, you should not confirm the delivery. The stop option is more of a "panic button". If there is no delayed delivery date set up, emails will start going out immediately. Therefore, even if you click stop, the execution of the emails will already be under way. If you accidently cancel or stop the delivery, an administrator or a power user can duplicate the campaign workflow.

You can track the delivery after you execute it. You can check the delivery logs and exclusions. The tracking logs are updated by the Mail Transfer Agent (MTA) on an hourly basis.

Creating Reports

You can generate reports in Adobe Campaign to evaluate the effectiveness of a campaign and to identify how to improve future campaigns. You can improve future campaigns by modifying the target based on the delivery reports and modifying your subject line, or link text based on the response reports. You can share, export, and print reports.

There are over 20 out-of-the-box or default reports in Adobe Campaign. You can create your own ad hoc reports using the descriptive analysis tool. If there is a report you want to use repeatedly and it is not covered in the default reports, you can use the report builder in Adobe Campaign to create a custom report.

Types of Reports

Adobe Campaign offers several types of reports, accessible via the customer console or an Internet browser. They are:

- Global reports: Display the activity of the data in the entire database.
- Delivery reports: Display the execution of deliveries via various reports accessible from the delivery overview.
- Cumulative reports: Display the cumulated reports on deliveries. You can generate the cumulative reports by selecting the deliveries to be compared.

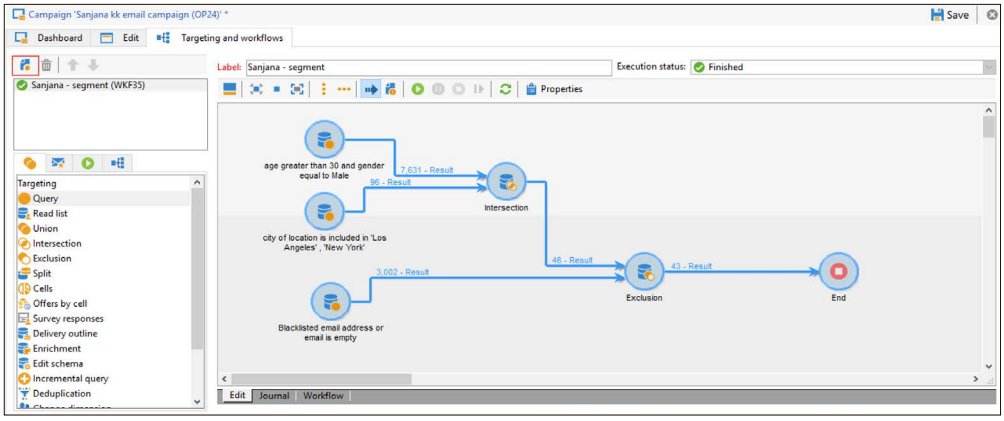
Exercise 6 – Execute campaigns

In this exercise, you will set up a campaign and a delivery. You should set the delivery properties so the approver is your own recipient record you created earlier. You can submit the delivery content for approval to send and validate a proof. You will also approve the content and then approve the delivery, and run reports on your recipient data's email domains. You will also execute a recurring campaign, and a retargeting campaign in this exercise.

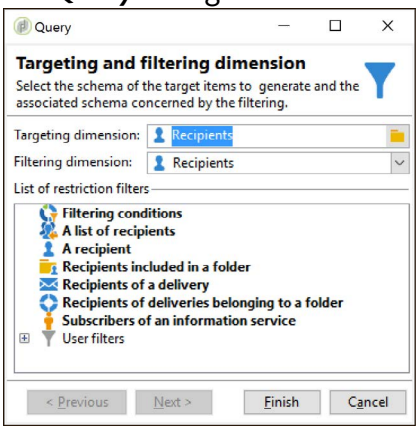
Task 1: Design a campaign workflow with targeting and delivery activities.

Create an email delivery

1. Open the campaign you created in Exercise 3.
2. Click the **Targeting and workflows** tab. The **Default workflow** workspace is displayed.
3. Click **Add**. The **New targeting workflow** dialog box is displayed.
4. In the **Label** field, enter **<student-name>'s workflow** where student name is your name.

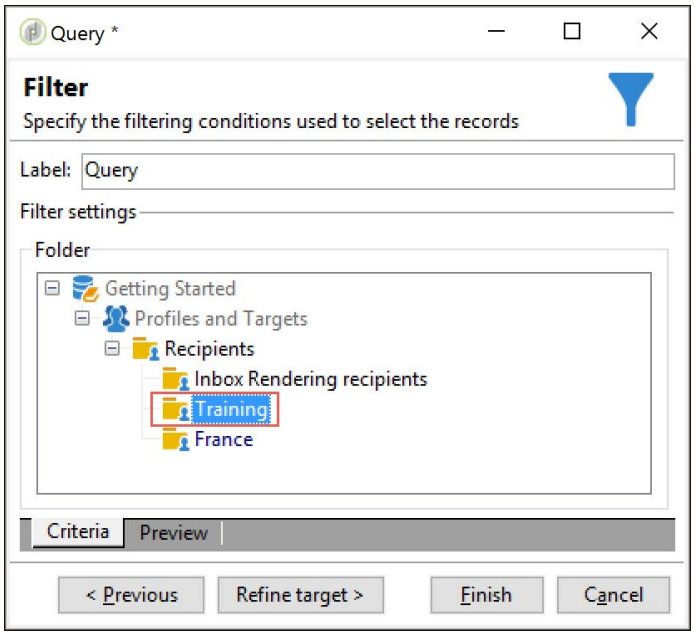


5. Click **Ok**. The new name is reflected in the **Label** field of the **Targeting and workflow** tab.
6. From the **Targeting** section, drag a **Query** activity onto the diagram.
7. Double-click **Query** on the workflow diagram. The **Query** dialog box opens.
8. Click the **Edit query** link. The **Query** dialog box to select the schema of the target opens.



9. Double-click **Recipients included in a folder.** The **Query** dialog box to select the folder opens.

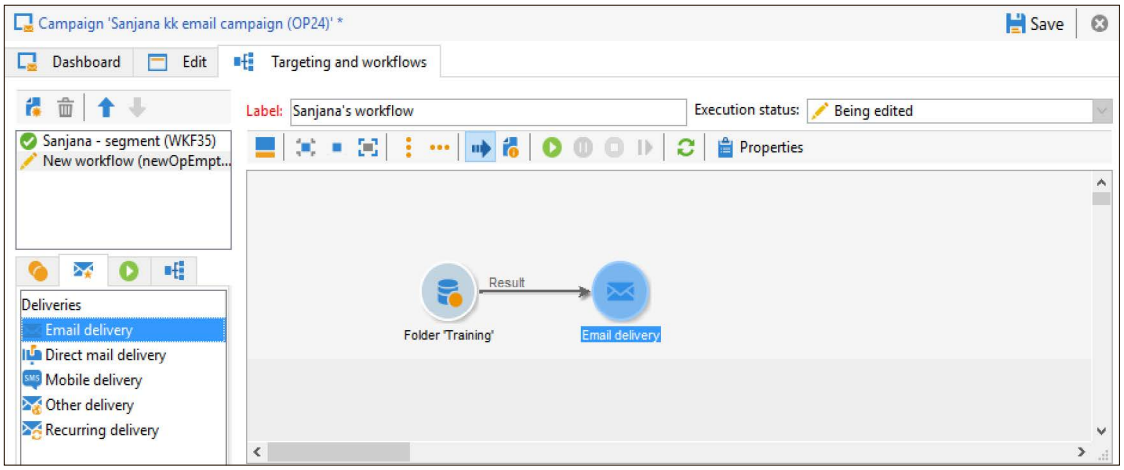
10. Expand the **Recipients** folder and select the **Training** folder.



11. Click **Finish** and then click **Ok**. The **Targeting and workflow** tab is displayed.

12. Click the **Deliveries** icon to open the options in the **Deliveries** section.

13. Drag an **Email delivery** activity from the **Deliveries** section onto the workflow diagram.



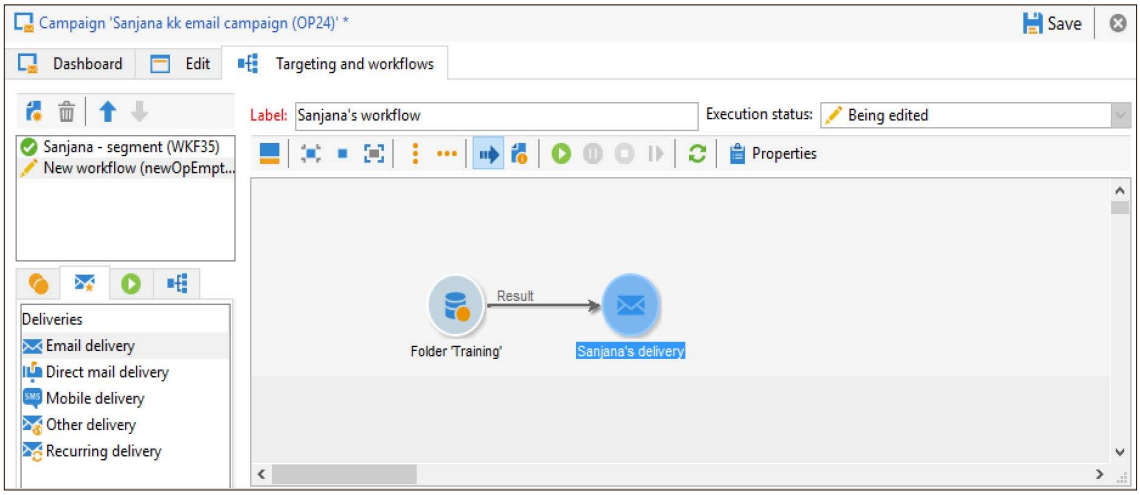
14. Double-click **Email delivery** in the workflow diagram. The **Delivery** dialog box opens.

15. In the **Delivery** dialog box, in the **Label** field, enter **<student name>'s delivery** where your name is the student name.

16. Click **Continue**.

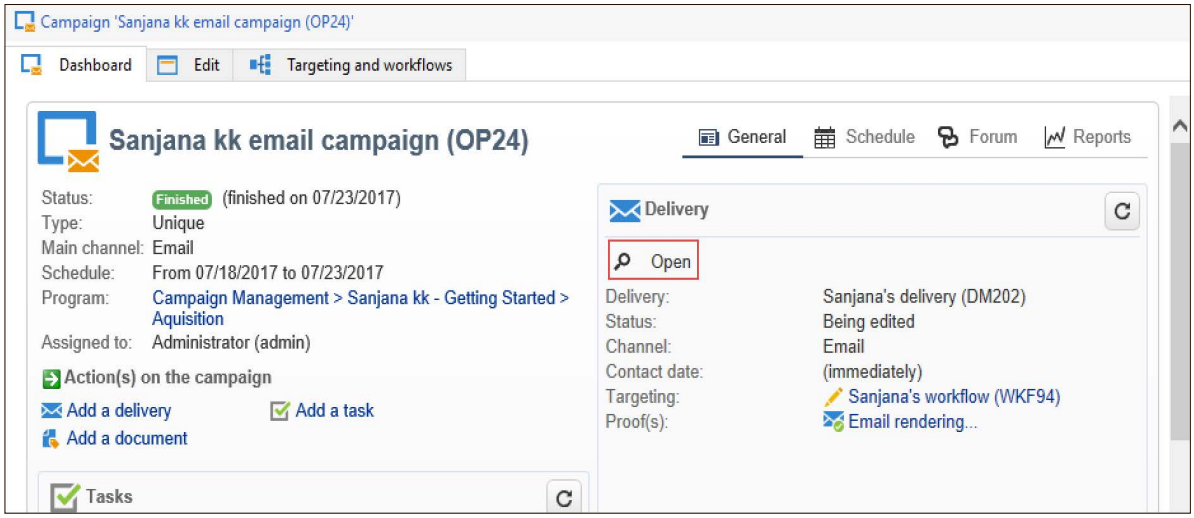
17. Click **Save** to close the **Delivery** dialog box. The name of the **Email delivery** is updated.

18. Click **Save** to save the workflow.



19. Click the **Dashboard** tab.

20. Click **Open** as shown in the screenshot.



21. Enter a subject line and create the body of the mail, remembering to generate the text version of the HTML body. Include both personalization fields of your choice. (If necessary, refer to Exercise 5.)

22. Click **Properties** at the top of the Delivery window. The **Delivery properties** dialog box opens.

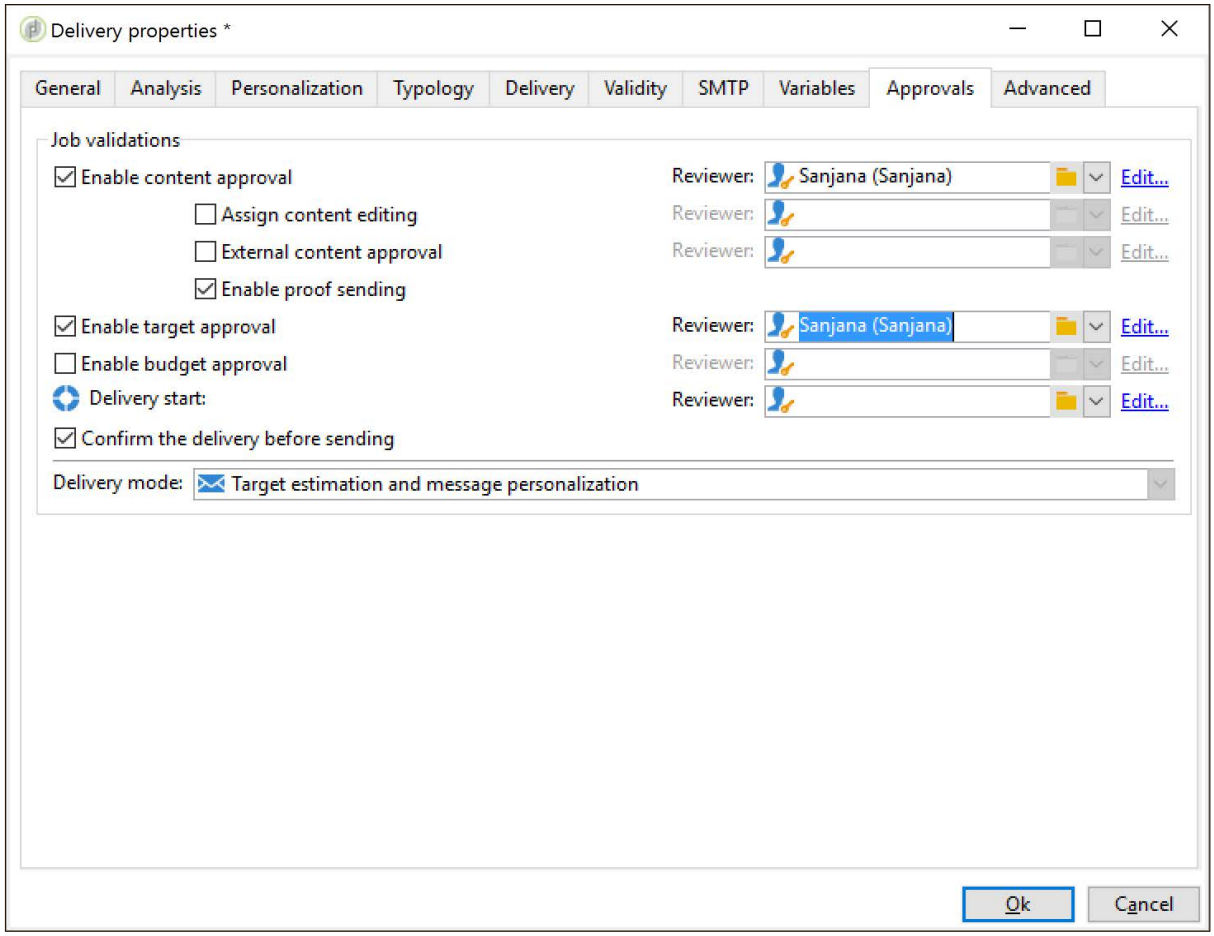
23. Click the **Approvals** tab, and select the **Enable content approval** checkbox. Three checkboxes are displayed under the **Enable content approval** option.

24. Select the **Enable proof sending** option.

25. Select the **Enable target approval**.

26. In the **Reviewer** field, click the folder icon. The **Please Select a Reviewer document** dialog box opens. In the Folder field, click the drop-down arrow and select **Administration**> **Access Management**> **Operators** > **Training** and select your details from the **Operators or groups** section. Your name is added in the **Reviewer** field.

27. Add a **Reviewer** for target approval.



28. Click **Ok**.

29. Preview the delivery, and make changes if necessary.

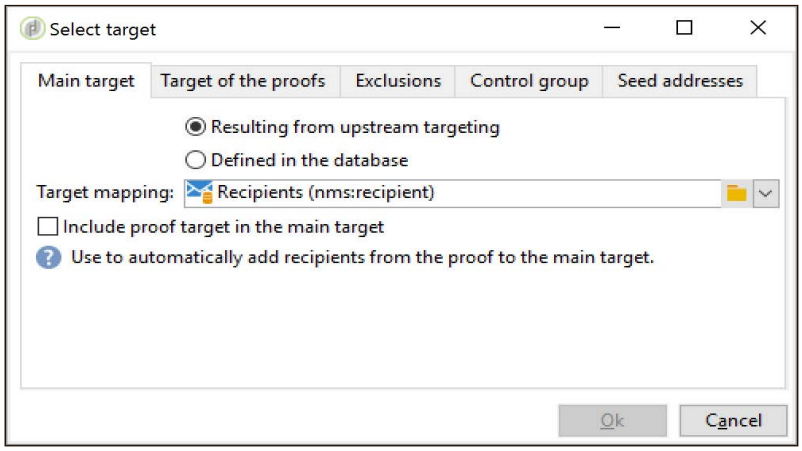
30. In the **Delivery <student name>'s delivery** dialog box, click **Save**. The delivery is saved.

Task 2: Submit the delivery content for approval and send a proof

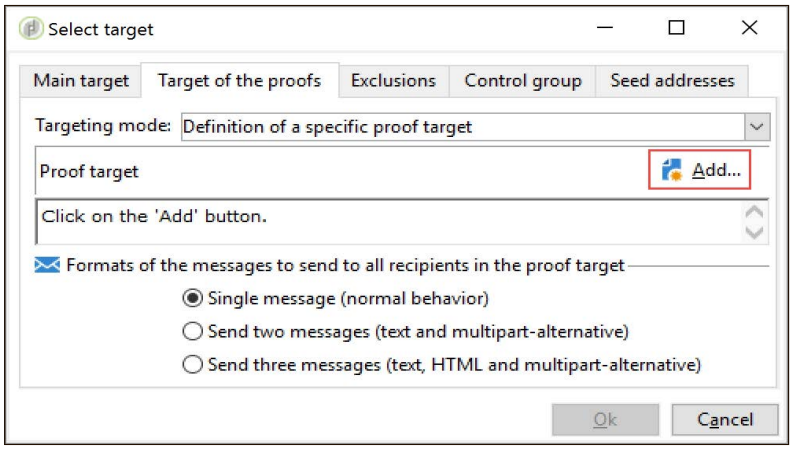
Submit the delivery content for approval in order to send and validate a proof.

1. On the **Dashboard** tab, click **Open**. The **Delivery <student name>'s delivery** dialog box displays.

2. Click the **To** link. The **Select target** dialog box is displayed.

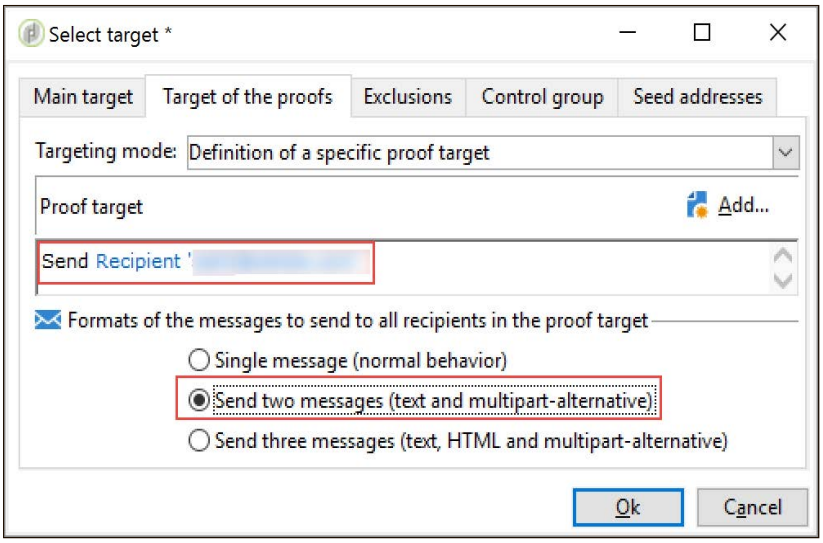


3. In the **Select target** dialog box, click **Target of the proofs**.
4. Ensure that in the **Targeting mode** field, **Definition of a specific proof target** is selected.
5. Click **Add**. The **Select target element** dialog box opens.



6. In the **Select target element** dialog box, double-click **A recipient** and select the recipient from the **Training** folder you added in Exercise 2.
7. Click **Finish**. The Select Target dialog opens.

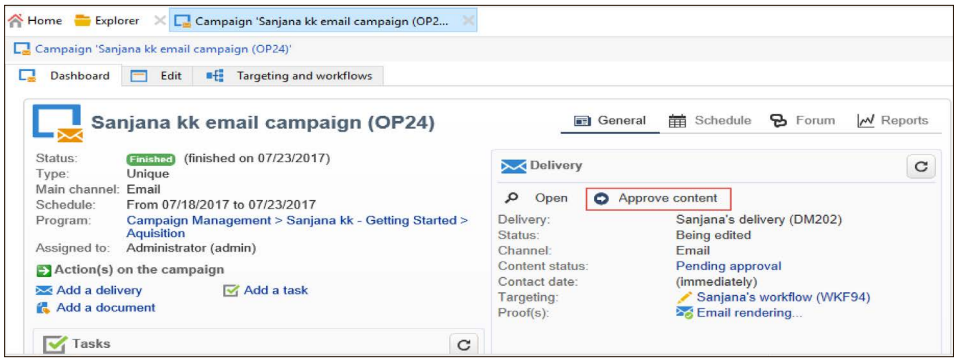
8. In the **Select target** dialog box, the selected mail ID is reflected in the **Proof targe**t section. In the **Formats of the messages to send to all recipients in the proof target** section, select **Send two messages (text and multipart-alternative)**.



9. Click **Ok** to close the **Select target** dialog box and go back to the **Delivery <student name>'s delivery** dialog box.
10. Click **Save** to save the delivery.
11. Click the **Dashboard** tab.
12. On the **Dashboard** tab, click **Submit Content**. The **Submit content** confirmation dialog box opens.
13. Click **OK** to confirm the submission.

NOTE: You will receive two emails in the recipient mail ID.

14. Click the **Dashboard** tab and click **Approve Content**. The **Action on delivery** dialog box opens.

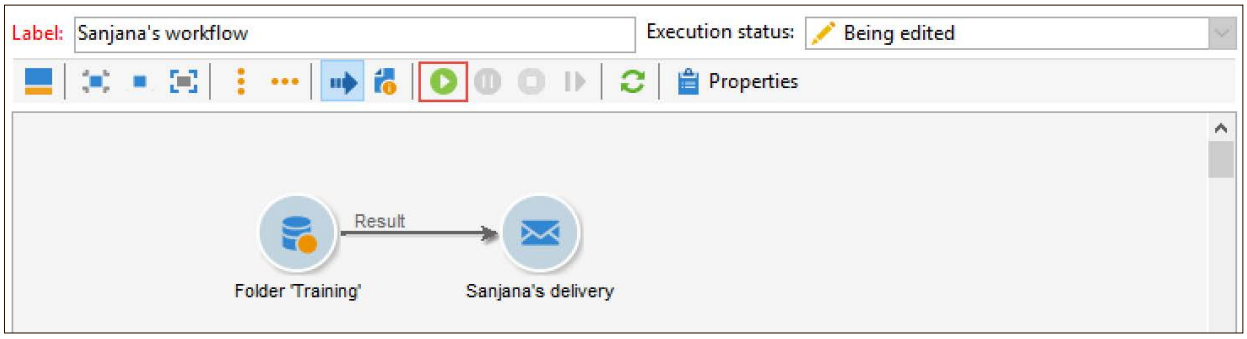


15. In the **Action on delivery** dialog box, select **Accept** and click **Content approval**.

Task 3: Approve targeting and Confirm delivery

Approve targeting and confirm delivery to execute the campaign.

1. Click the **Targeting and workflows** tab.
2. Click the **Start** button to start the workflow.



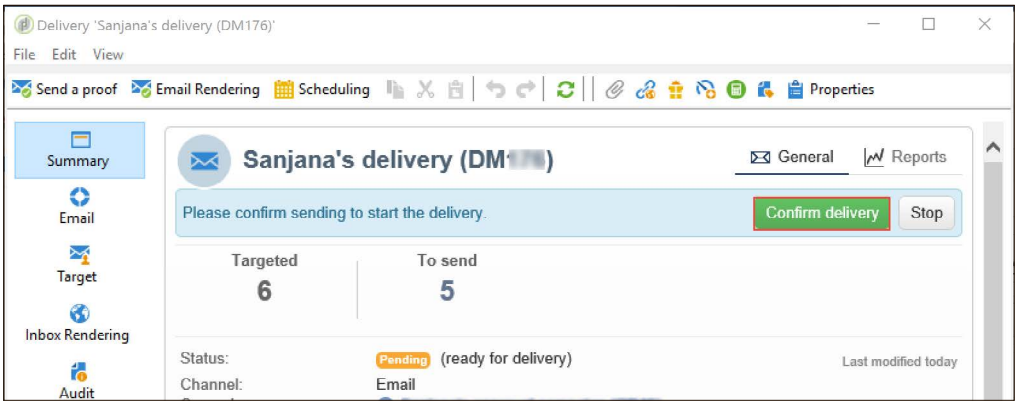
3. Click the **Dashboard** tab, go to the Delivery section, and click **Open**. The **Delivery <student name>'s delivery** dialog box opens.
4. In the **Delivery <student name>'s delivery** dialog box, click **Audit.**
5. Click **Summary** and click **Approve targeting**. The **Action on delivery** dialog box opens.

NOTE: In your target approval email, there should be a "code" after the name of the delivery such as **DM176**. This code should match the code that appears in the Summary page at the top.

6. Click **Accept** and click the **Target approval** button to approve the target.

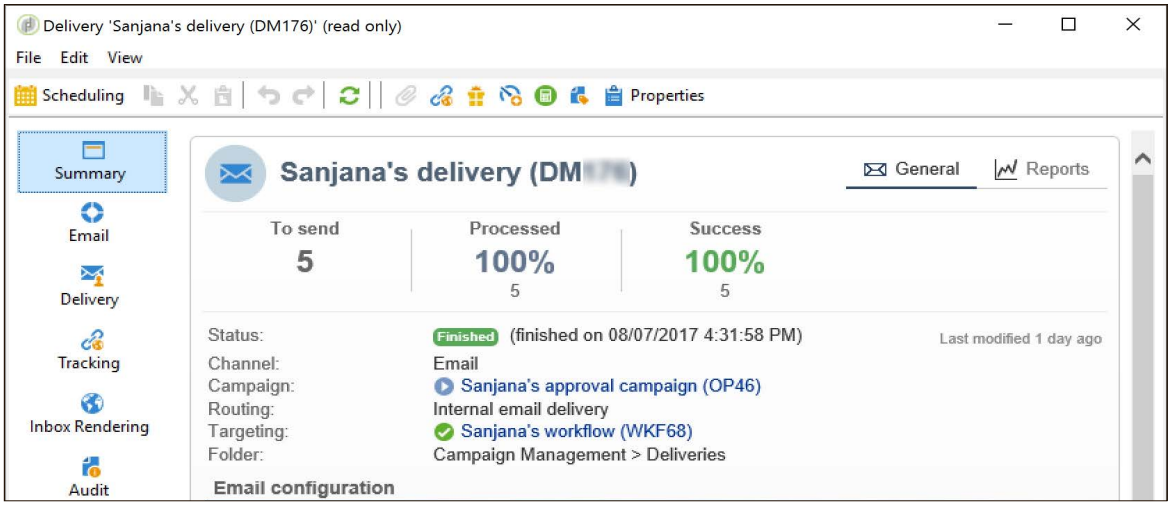
   Verify all tabs/pages - Email, Delivery and Audit to ensure your delivery looks OK/acceptable. This is the final step to stop the delivery.

7. If everything looks good, go to **Summary** and click **Confirm delivery**, as shown below. The **Start delivery** confirmation dialog box opens.



NOTE: Notify your instructor if there are any errors or warnings on the Log tab.

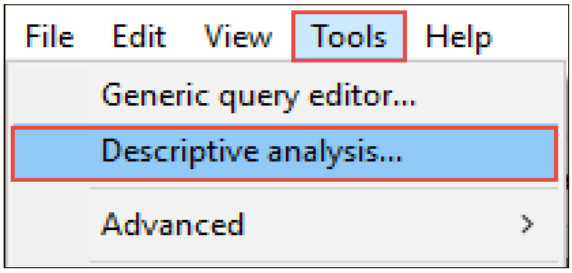
8. In the **Start delivery** confirmation dialog box, click **Ok**. You will receive an email. This screenshot shows the Summary page after the delivery.



Task 4: Analyze a population

Analyze a population to determine the most popular email domains.

1. On the menu bar, click **Tools** and select **Descriptive analysis**. The **Descriptive analysis wizard** opens.



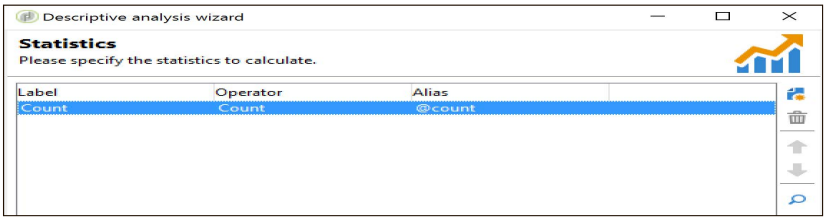
   In the **Descriptive analysis wizard**, the **Descriptive analysis configuration** page enables you to select the descriptive analysis template.

2. In the **Descriptive analysis configuration** page of the **Descriptive analysis wizard**:
   a. In the **Select a descriptive analysis template** section, select **New descriptive analysis from a template**.
   b. In the **Template** field, select **Qualitative distribution (qualitative)**.
   c. In the **Display** mode section, select **Chart**.

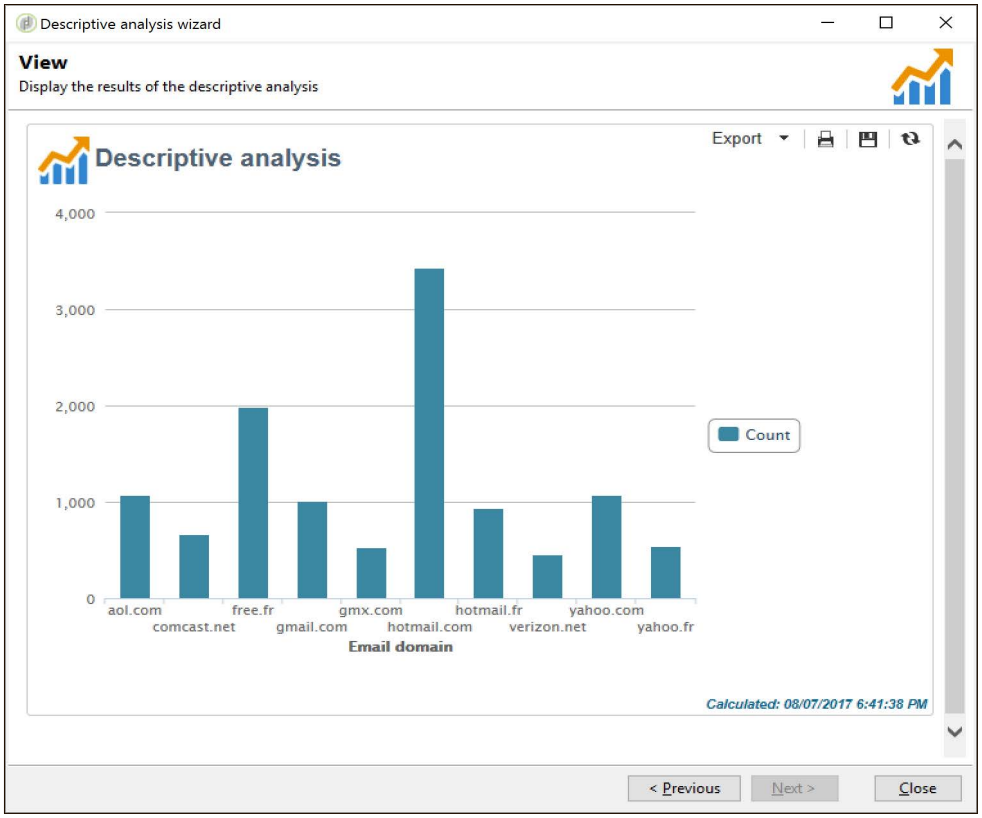
3. Click **Next**. The **Chart configuration** page of the **Descriptive analysis wizard** is displayed.

4. In the **Chart configuration** page:
   a. In the **Data** section, select **1 variable**.
   b. In the **First variable (X axis)** field, click the **Edit expression** icon. The **Select an expression** dialog box opens. In the Available fields section, double-click **Email domain (@domain).**
   c. Click the **Label** field and **Email domain** is automatically added to the field.
   d. In the **Chart type** section, select **Histogram** or **Pie**. For this exercise, select **Histogram**.

5. Click **Next**. The **Statistics** page of the **Descriptive analysis wizard** displays where the count is listed.



6. Click **Next**. The **View** page of the **Descriptive analysis wizard** displays where you can view the result of the descriptive analysis.

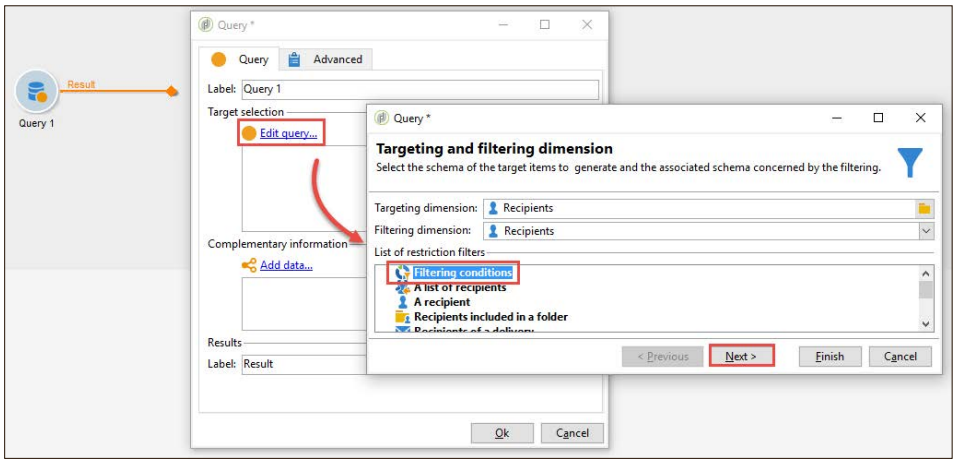


Task 5: Execute a recurring birthday campaign

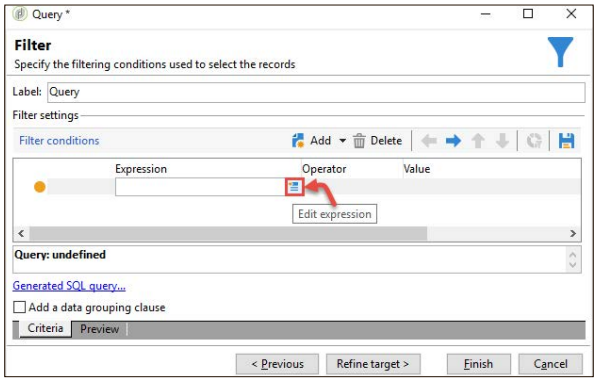
Create a workflow to execute a recurring birthday campaign.

1. Open the campaign you created in Exercise 3.
2. On the **Targeting and workflows** tab, create a new campaign workflow:
3. Click **Add**. The **New targeting workflow** dialog box opens.
4. In the **New targeting workflow** dialog box, in the **Label** field, rename your workflow as **YourInitials_Birthday_Recurring.**
5. Click **Ok.**
6. Drag a **Query** activity on the canvas.

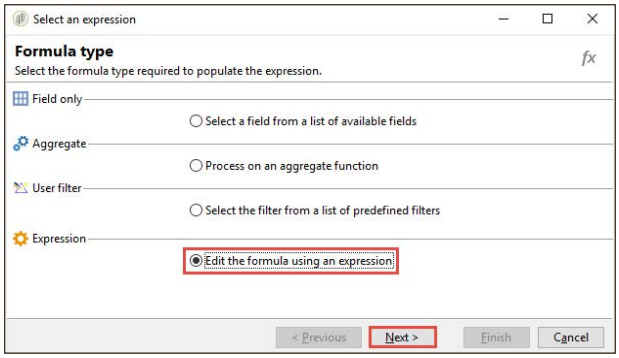
7. Double-click the **Query** activity.
8. Click **Edit query**, select **Filtering conditions**, and then click **Next**.



9. Build the expression to extract the Day of the birth date:
   a. In the **Expression** column, click **Edit expression**.

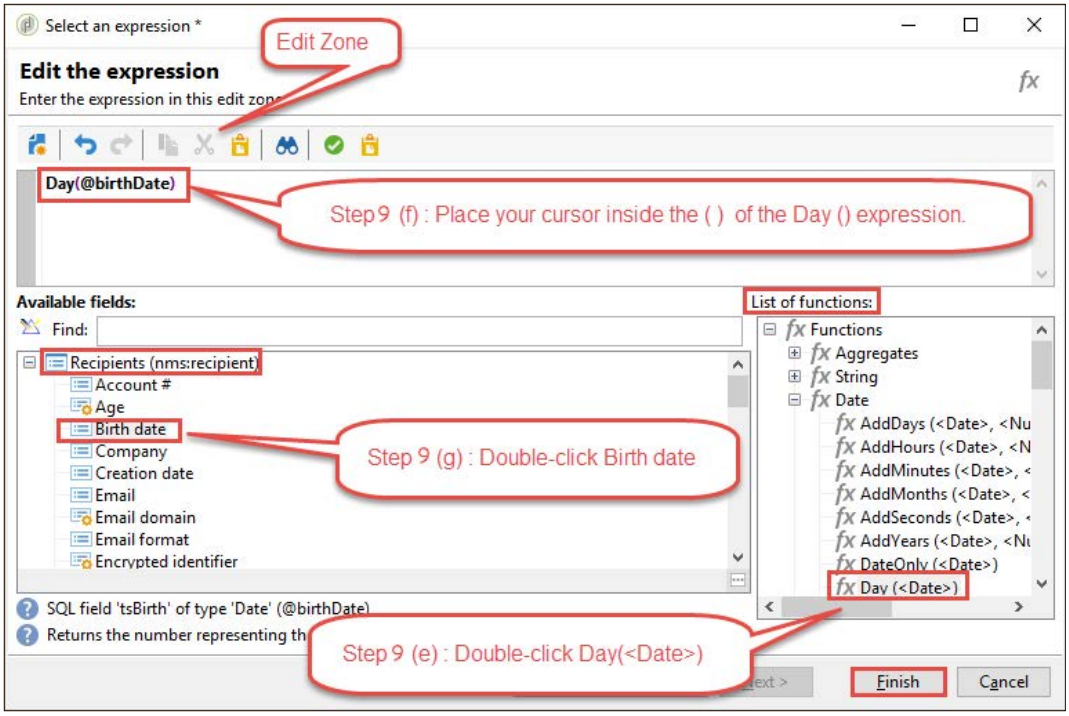


   b. Click **Advanced selection** to build your own expression. The **Select an expression** dialog box opens.
   c. In the **Expression** area, select **Edit the formula using an expression**, and click **Next**. The **Edit the expression** page of **Select an expression** dialog box opens.



NOTE: You are now in the Function editor. Functions are listed on the right side of the screen and fields of the recipients' table are on the left side.

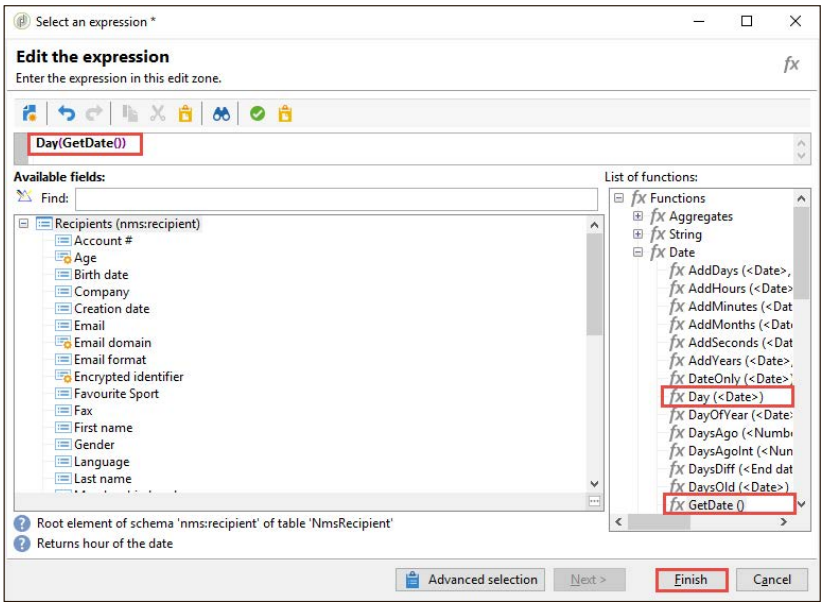
d. In the **List of Functions** area, expand the **Date** node, and double-click **Day (<Date>)** to place the selected function in the edit zone.
e. In the edit zone, place your cursor inside the **()** of the **Day()** expression.
f. Go the **Recipients (nms:recipient)** column, and double-click **Birth date**.
g. Ensure the expression in the Edit zone is **Day(@birthDate)**.
h. Click **Finish**. The **Filter** page of the **Query** dialog box opens.



10. In the **Filter** page of the **Query** dialog box, select **equal to** as the operator.

11. Build the expression to extract Today's day for the value. To do so:
    a. Click inside the **Value** field, and click **Edit expression**. The **Edit the expression** window opens.
    b. In the **List of functions** section, expand the **Date** node, and double-click the function **Day (<Date>)** to add it in the **Edit** zone.
    c. In the Edit zone, place your cursor inside the **()** in the **Day()** expression.
    d. From the **List of functions** section, double-click **GetDate ()** to create it in the expression already in the Edit zone.

e. Ensure the expression in the Edit zone is **Day(GetDate())**.



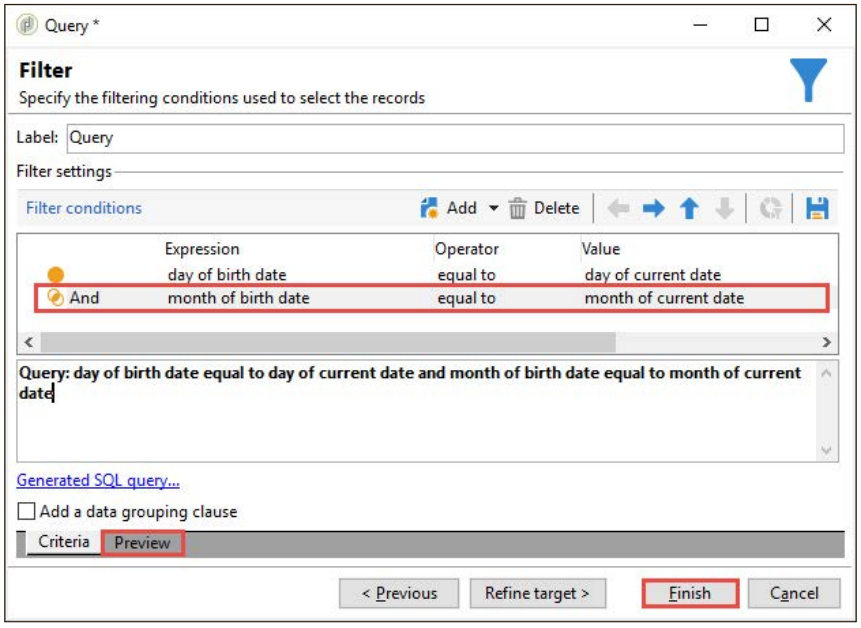
f. Click **Finish**.

12. In the **Filter** page of the **Query** dialog box, click **Add** to create a new line.

13. Repeat the steps to extract the **month of the birth date**. For example: **Month(@birthDate)**

14. Keep **equal to** as the operator.

15. Repeat the steps to extract today's month - using **Month(GetDate())**.

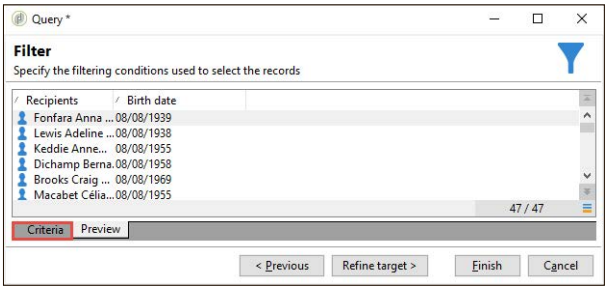


16. In the **Filter** page of the **Query** dialog box, verify the expression to see if it is **month of birth date equal to month of current date**.

17. In the **Filter** page of the **Query** dialog box, click the **Preview** tab. The preview of the recipients who meet the filtering conditions' criteria is displayed.

18. In the preview, right-click the list of names and select **Configure List.**

19. Using the **Configure list** dialog box, double-click **Birth date** on the left side in the **Available fields** column to move it to the **Output columns**. The Birth date column is added to the preview.



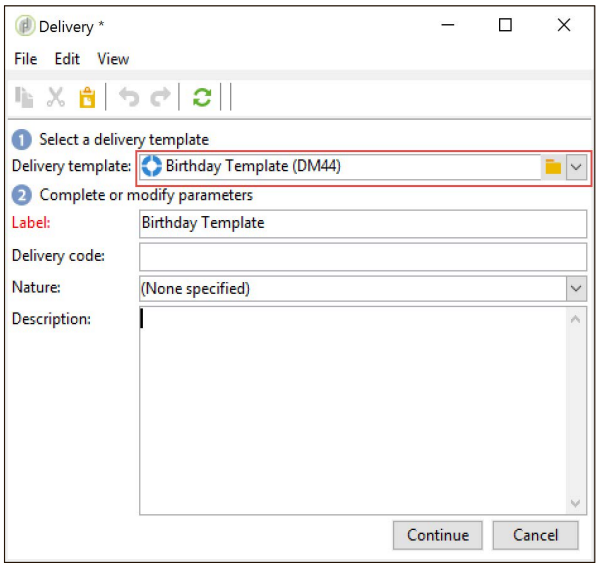
NOTE: Ensure that the your birthday in the recipient data matches the current date to generate your data in the Preview.

20. Click **Finish** and then click **Ok** to close the Query. The query is displayed in the workflow as shown:

21. Click the **Actions** icon and drag **Recurring delivery** onto the workflow diagram and link it to the query you created.
    You cannot use a standard delivery template because it cannot be sent several times. Instead, use a recurring delivery or a continuous delivery. The following table lists the differences between a recurring delivery and a continuous delivery:

Recurring	Continuous
Can select an existing template	Can select an existing template
Can edit or insert/upload content	Cannot edit content
Can create new delivery object each time the workflow runs	Resends the same delivery
Reports for each delivery + Campaign reports	No Delivery + Campaign Reports; however, information is still available in logs.

22. Double-click the **Recurring delivery**.
23. Click the folder icon. The **Please select a Template document** dialog box is displayed.
24. Click the folder icon and select **Resources**> **Templates**> **Delivery Templates**.
25. Select the **Birthday Template(DM44**) and click **Continue**. The **Delivery** dialog box opens.

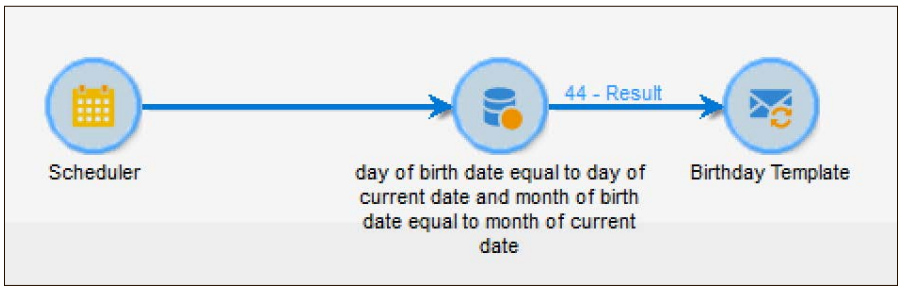


26. Enter a subject line in the **Subject** field and generate the preview of the content on the **HTML conten**t tab and the **Text conten**t tab.
27. Click **Ok**.
28. Click **Save** in the **Delivery** dialog box. The name of the **Recurring delivery** is changed to **Birthday Template** in the workflow diagram.
29. Click the Flow Control icon and drag **Scheduer** onto the beginning of the workflow.
30. Link the **Scheduler** to the **Query**.

31. To configure the Scheduler:
    a. Double-click the **Scheduler** activity to open it.
    b. In the lower-right corner, click **Change**.
    c. Select **Daily** as frequency and click **Next**.
    d. Configure the start time as **09:00 AM**.
    e. Retain the day selection to **Every day** and click **Next**.
    f. Retain the validity period as **Permanent validity**.
    g. Click **Next**, and review the summary of next launches.
    h. Click **Finish** and click **Ok** to close the Scheduler.

NOTE: Before running the workflow, ensure you have a participant recipient data with a birthday matching the current date and a valid email ID.

32. Run the campaign by clicking **Start**. A confirmation dialog box opens.
33. Click **Yes**.
34. Click the **Dashboard** tab, on the **Deliveries** section, open the delivery and click **Confirm delivery**.
35. The Scheduler starts processing but remains paused based on the starting hour you configured.
36. Right-click the **Scheduler** and select **Execute pending task(s) now** in the menu. The workflow is processed and the birthday delivery is sent.
37. Check if the **Scheduler** is blinking - this means the scheduler is waiting for the next launch.
38. Go to your delivery folder and review your the delivery.

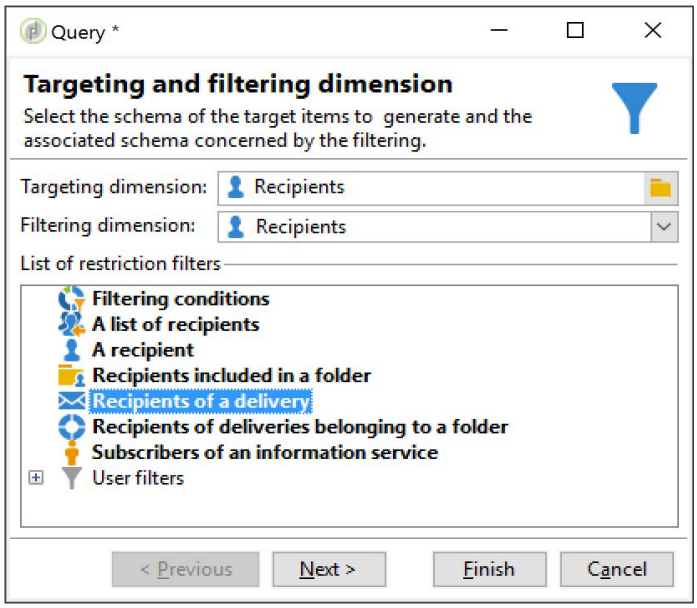


Task 6: Execute a retargeting campaign

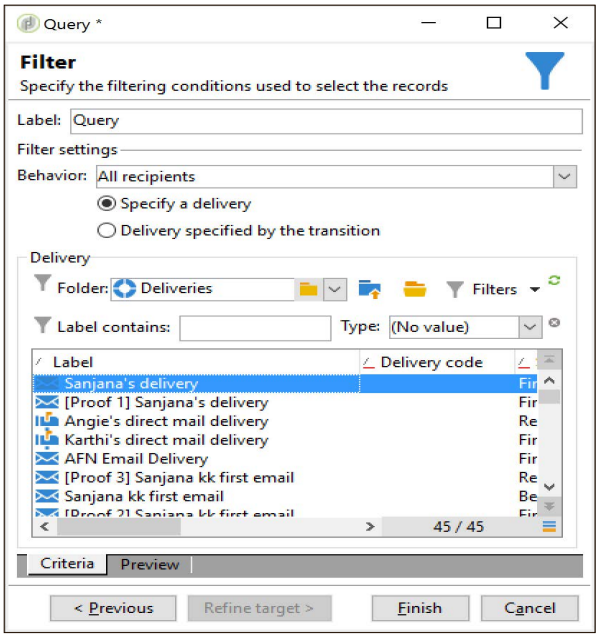
Create a workflow to execute a retargeting campaign to target the recipients of a previous delivery.

1. Open the campaign you created in Exercise 3.
2. Click the **Targeting and workflow** tab.
3. Click the **Add** icon to add a new workflow. The **New targeting workflow** dialog box opens.
4. In the **New targeting workflow** dialog box, in the Label field, enter **Retargeting workflow** and click **Ok**.

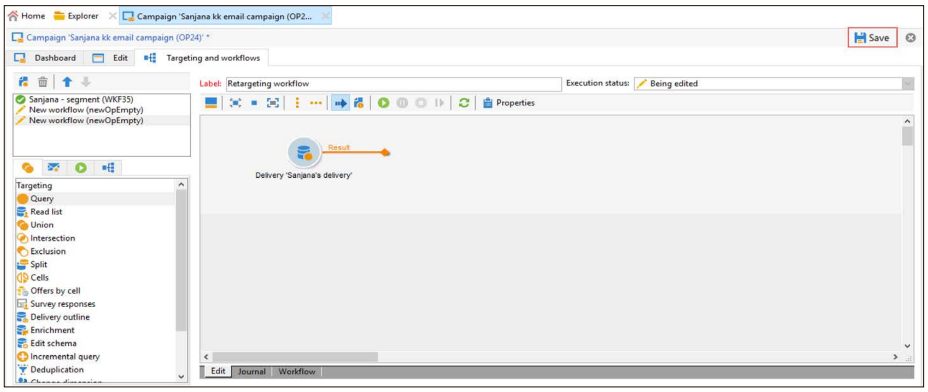
5. Drag a query to the workflow diagram and double-click the query.
6. In the **Query** dialog box, click **Edit query** link. The **Targeting and filtering dimensions** page of the **Query** dialog box is displayed.
7. From the **List of restrictions filter** section, select **Recipients of a delivery**.



8. Click **Next**. The **Filter** page of the **Query** dialog box is displayed.
9. In the **Folder** field, click the folder icon, expand **Campaign Management** and select **Deliveries**.
10. In the **Label** section, the deliveries that were targeted earlier are displayed. Select a delivery to retarget. In this exercise, **Sanjana's delivery** is selected for demonstration purpose.



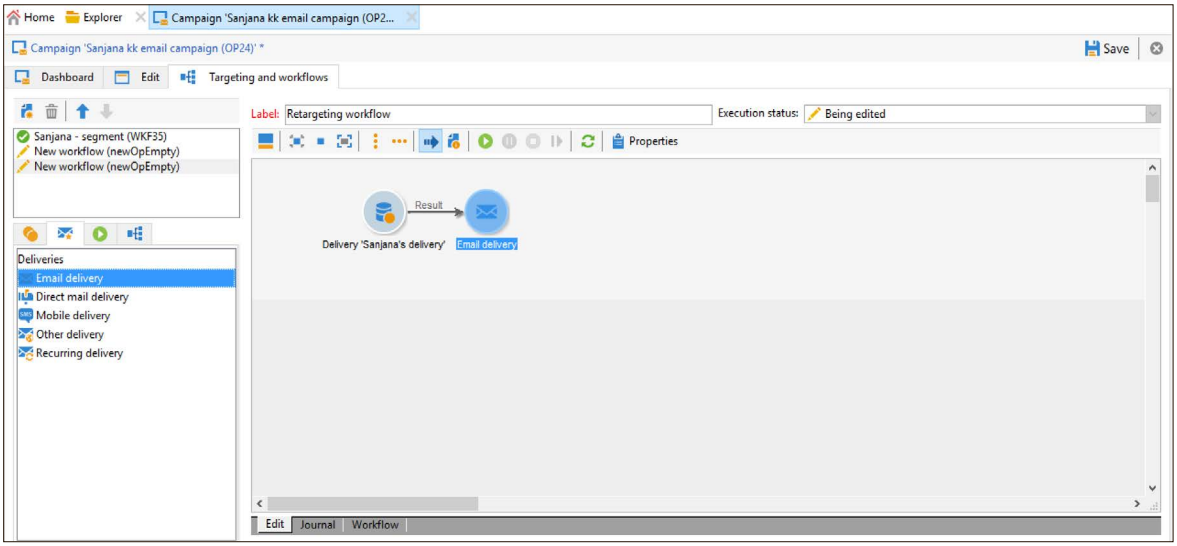
11. Click **Preview** to preview the recipients in the delivery and click **Finish**.



12. Click **Ok** to close the Query dialog box.

13. Click **Save** to save the workflow.

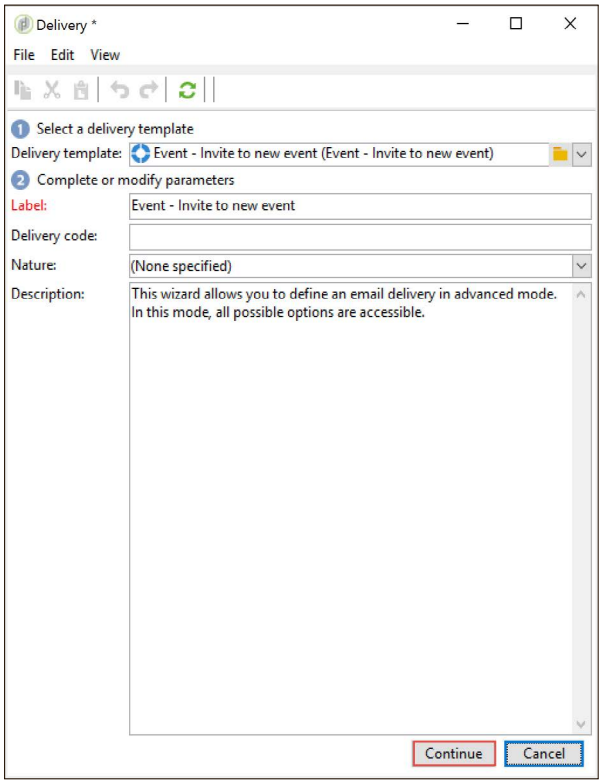
14. Click the **Deliveries** icon and drag an **Email delivery** activity to the workflow diagram.



15. Double-click the **Email delivery** activity on the workflow diagram. The Delivery dialog box is displayed.

16. In the Delivery dialog box:
    a. In the **Delivery template** field, click the folder icon. The **Please select a Deliveries document** is displayed. In the **Folder** field, click the drop-down icon and select **Resources**> **Templates**> **Delivery Templates** and click **OK**.
    b. Select a delivery template. In this exercise, you will select **Event - Invite to new event (Event - Invite to new event)** template and click **Ok**. You are back on the Delivery dialog box.
    c. In the Label field, verify the name of the delivery is updated.

d. Click **Continue**.



17. Notice how the Delivery dialog box displays fields to update the delivery such as **Subject**, **Attachments**, **HTML content**, **Text content** and **Preview**.
18. Generate the preview in the **HTML content** and **Text content** by adding a recipient in the **Test personalization** drop-down list accessible via the **Preview** tab.
19. Click **Properties** at the top of the **Delivery** dialog box. The **Delivery properties** dialog box opens.
20. Click the **Approvals** tab, and select the **Enable content approval** checkbox. Three checkboxes are displayed under the **Enable content approval** checkbox.
21. Select the **Enable proof sending** checkbox.
22. Select the **Enable target approval**.
23. In the **Reviewer** field, click the folder icon. The **Please Select a Reviewer document** dialog box is displayed. In the Folder field, click the drop-down and select **Administration**> **Access Management**> **Operators** > **Training** and select your details from the **Operators or groups** section.
24. Add a reviewer for target approval and click **Ok**.

25. Click **Save** on the **Delivery** dialog box.

26. Click **Save** to save the workflow.

27. Click the **Dashboard** tab, in the **Delivery** section, select **Submit content**.

28. The **Submit content** confirmation dialog box is displayed.

29. Click **OK** to confirm the submission.

30. Click the **Dashboard** tab and click **Approve Content**. The **Action on delivery** dialog box opens.

31. In the **Action on delivery** dialog box, click **Accept** and select the **Content approval** button.

32. Click the **Targeting and workflows** tab.

33. Click the **Start** button to start the workflow.

34. Click the **Dashboard** tab, go to the **Delivery** section, and click **Open**.

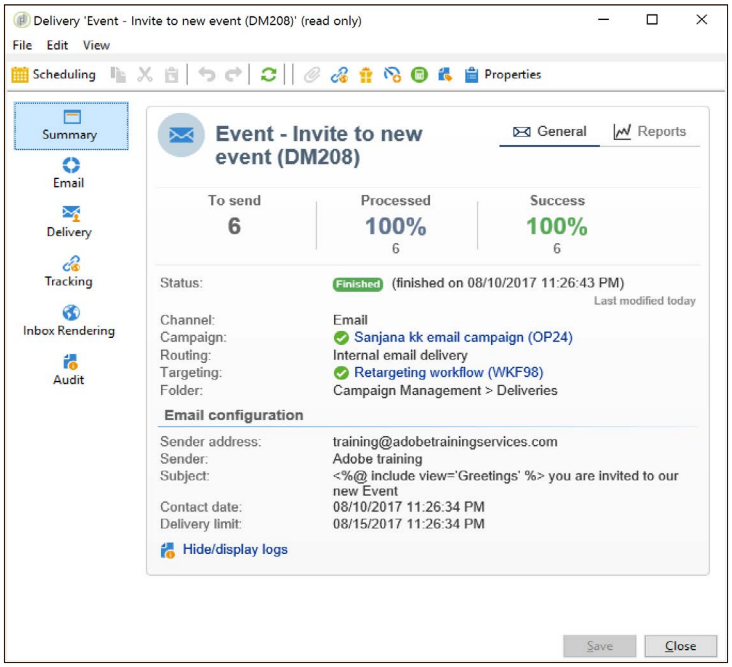
35. Click **Summary** and click **Approve targeting**. The **Action on delivery** dialog box is displayed.

36. Click **Accept** and click the **Target approval** button to approve the target.

    Verify all tabs/pages - Email, Delivery and Audit to ensure your delivery looks OK/good. This is the final step to stop the delivery.

37. If everything looks good, go to **Summary** and click **Confirm delivery**. The **Start delivery** confirmation dialog box opens.

38. In the **Start delivery** confirmation dialog box, click **Ok**. You will receive an email. The following screenshot shows the Summary page after the delivery.



Chapter Six

Direct Mail, SMS, and Multichannel Delivery

Objectives

By the end of this chapter, you will be able to:

- Explain direct mail delivery
- Explain SMS delivery
- Explain multichannel campaigns
- Explain event-triggered campaigns
- Send a direct mail delivery

Direct Mail Delivery

Direct mail is a marketing collateral sent through postal mail to the customer's home or place of business. Typically, direct mail consists of catalogs, coupons, and flyers.

In Adobe Campaign, you can generate an extraction file that includes the contact details of recipients, such as first name, last name, street address, town/city, state, and zip/postal code. You can also include other useful information, such as who is getting which version of the print.

You will then route your extraction file to the agency or department that sends out the delivery.

Generating Extraction Files

The process of generating the extraction file involves:

1. Creating the delivery
2. Defining the content – extraction
3. Confirming the delivery
   a. Analyze the delivery
   b. Send the delivery

NOTE: Depending on the template or content used, level of personalization required, and level of targeting complexity, these steps may vary.

Managing Extraction Files

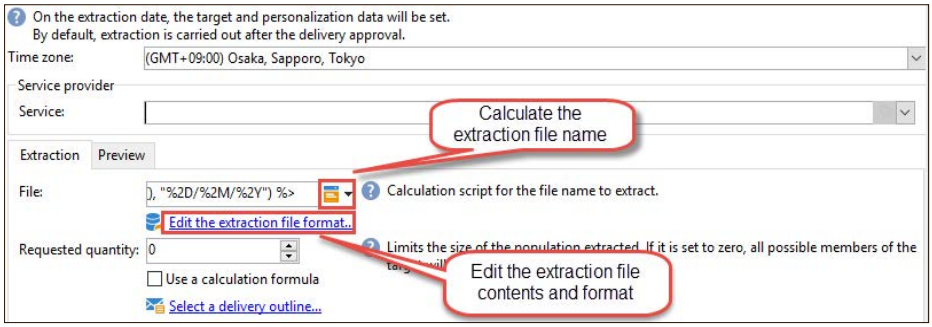
Within the direct mail delivery activity, you can:

- Schedule when the extraction file is to be generated. If you have a service provider modeled in Adobe Campaign, the routing workflow is triggered when the extraction takes place.
- Configure to download the extraction file to your computer *after* the file is generated on the server.
- Incorporate the date the file is extracted into the extraction file name.
- Format the extraction file by specifying the columns you want included, order of the columns, and file format (.csv or text file).

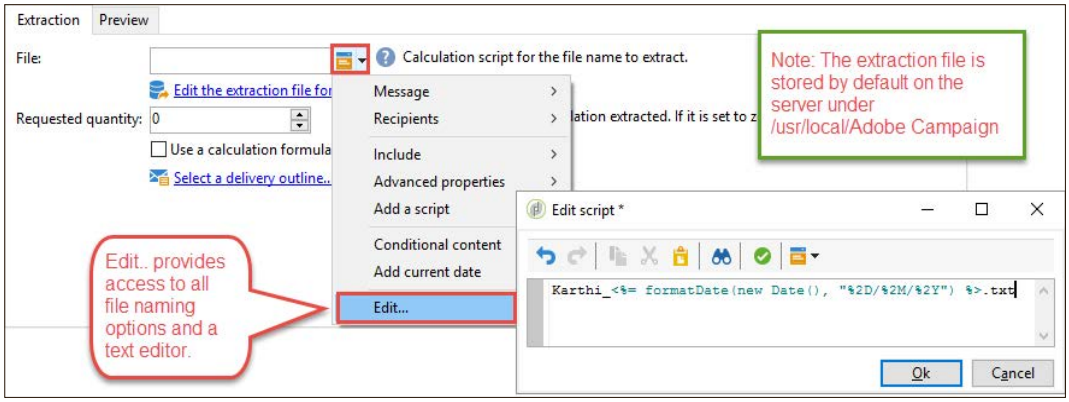
Extraction File Format

Typically, the file format is part of the template, so you do not need to configure the file format each time you execute a direct mail campaign. The template is set up based on how your fulfillment provider wants the information provided to them. For example, there might be one template for each direct mail provider. You could also name the extraction file and include the date on the direct mail activity as shown in the following screenshot.

NOTE: If you already named the extraction file on the **Advanced** tab, this information will carry over.



The extraction file is stored on the server, and if you want to download it, you can specify the location. You will, however, need to ensure the directory is writable.



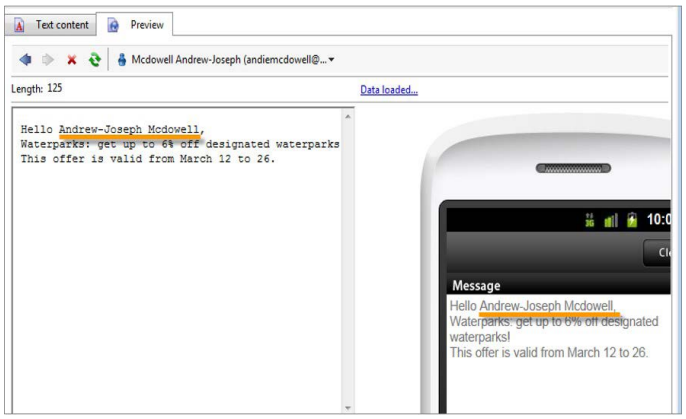
SMS Delivery

Adobe Campaign helps you perform mass, personalized delivery of Short Message Service (SMS) messages. The recipient profiles must contain at least a mobile telephone number to execute this delivery.

For SMS campaigning, you need:

- An external account specifying a connector and type of message. The available connectors are NetSize, SMPP Generic (SMPP version 3.4 supporting binary mode), Sybase365 (SAP SMS 365), mBlox and Tele2, and O2.
- A delivery template that references the external account.

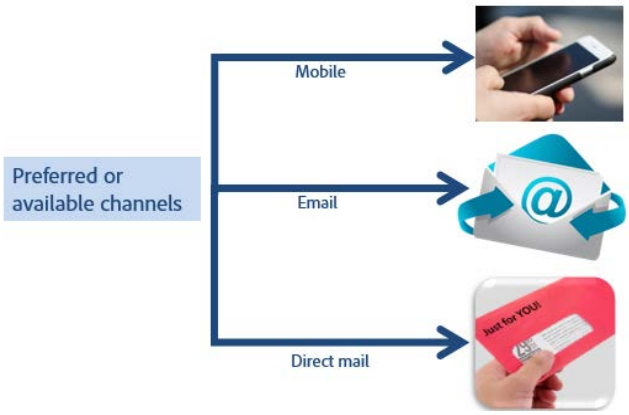
The following screenshot depicts the SMS delivery preview mode:



The length of SMS messages is limited to 160 characters if the Latin-1 (ISO-8859-1) code page is used. If the message is written in Unicode, it must not exceed 70 characters. When personalization fields or conditional content fields are present, the size of the message varies from one recipient to another. You must evaluate the length of the message after personalization is carried out.
When you launch the analysis, the length of messages is checked, and a warning is displayed in the event of character overflow.

Multichannel Campaigns

In a multichannel campaign, a single marketing communication utilizes multiple channels based on, for example, the customer's preferred channel or on an available channel that might have a wider audience reach.



After initial segmentation, you can segment by channel to:

- Reach a wider audience by using available channels
- Target customers through their preferred channel

Event-triggered Campaigns

Adobe Campaign enables you to design event-triggered campaigns for discrete one-time events, such as birthdays or a purchase. A birthday is a discrete event because it occurs on a specific day.

Another concept for a trigger campaign could be a transition. For example, you could target prospects after they convert to a client/member or reach a certain level of their membership. After they become a client, they are hopefully still a client the next day, and you would want to ensure to only target them one time – when you transition or qualify prospects. You should not repeatedly target them because customers may become annoyed when they receive a welcome email every day.

Exercise 7 - Send a direct mail delivery

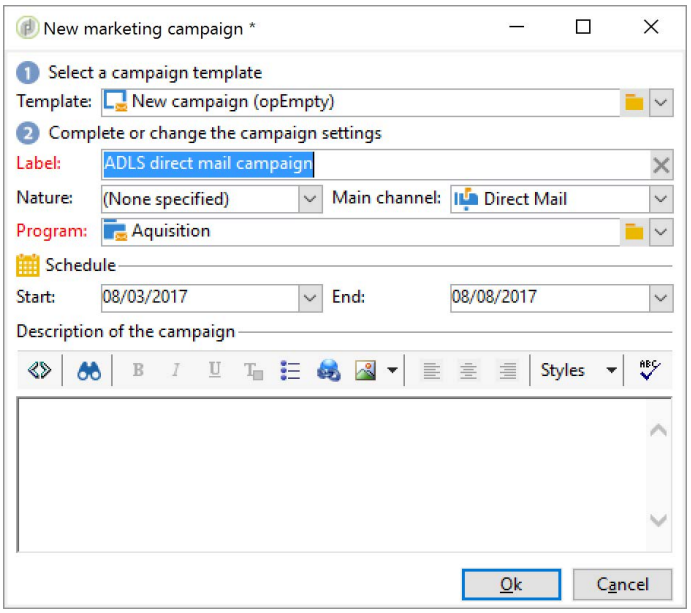
In this exercise, you will create a direct mail delivery, edit the delivery, format the extraction files, and execute the delivery.

Task 1: Create a direct mail delivery

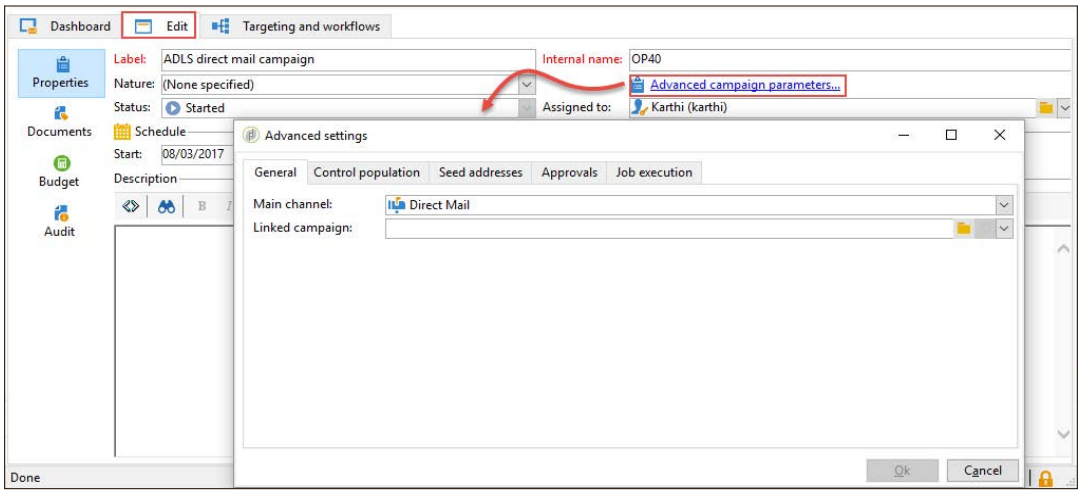
Configure approvals and control group, seed addresses for a direct mail delivery, and design the campaign workflow.

1. In the Explorer view, click **Campaign Management**. Select the plan you created and select **Acquisition**.
2. In the list view, click the **New** icon. The **New marketing campaign** dialog box displays.
3. In the **New marketing campaign** dialog box:
   a. In the **Template** field, click the drop-down arrow and select the template. For this exercise, keep the default template, **New campaign (opEmpty)**.
   b. In the **Label** field, enter **<Your name> direct mail campaign**. For example: **Angie direct mail campaign**
   c. In the **Main channel** field, select **Direct Mail.**

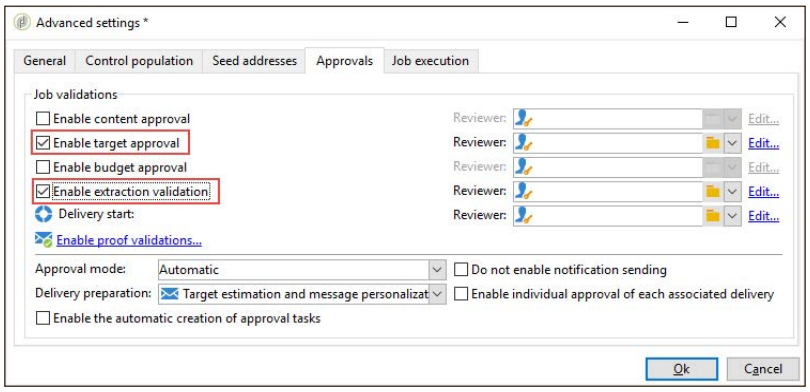
d. Keep the default start and end dates.



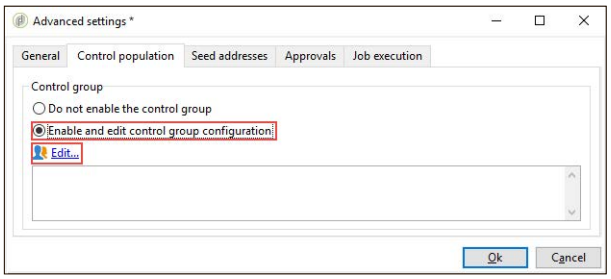
4. Click **Ok**. The newly created campaign is added to the list view.
5. Double-click the campaign. Your newly created campaign opens in its own workspace.
6. Click the **Edit** tab, and then click **Advanced campaign parameters**. The **Advanced settings** dialog box opens.



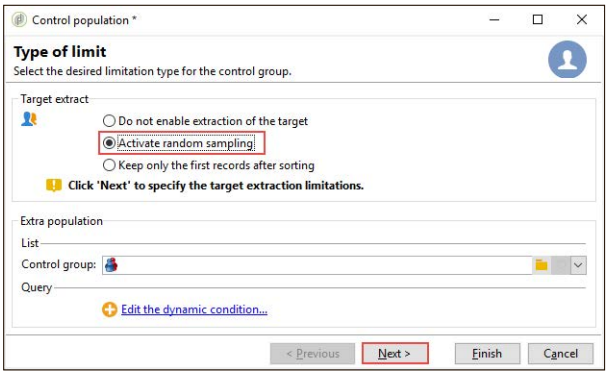
7. In the **Advanced settings** dialog box, click the **Approvals** tab and verify all checkboxes in the **Job validations** section are cleared except for **Enable target approval** and **Enable extraction validation**.



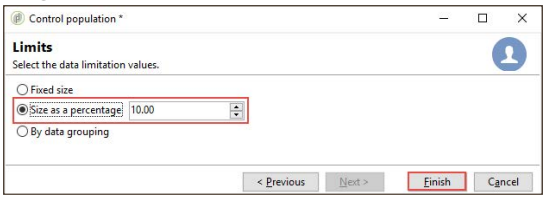
8. Click the folder icon parallel to the **Enable target approval** checkbox to open the **Please select a 'Reviewer' document** dialog box and select your name as the reviewer. You may have to explore different operators or groups to find your name.
9. Keep the **Advanced Settings** dialog box open.
10. Click the folder icon parallel to the **Enable extraction validation** checkbox to open the **Please select a 'Reviewer' document** dialog box and select your name as the reviewer.
11. Click **Ok**.
12. Click the **Control population** tab and select **Enable and edit control group configuration**.
13. Click **Edit**. The **Control population** dialog box opens.



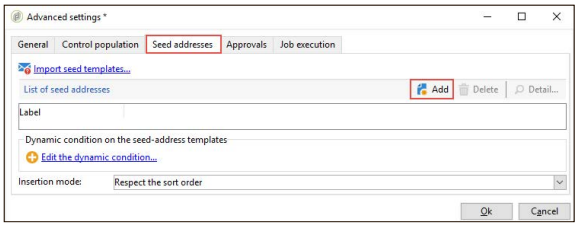
14. In the **Target extract** section, select **Activate random sampling**.
15. Click **Next**.



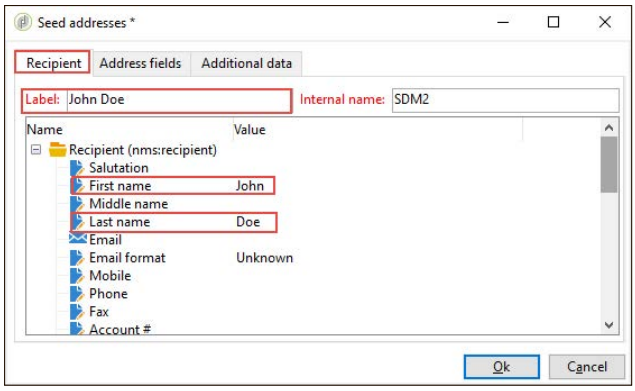
16. Select **Size as a percentage**, and enter **10,** as shown below:



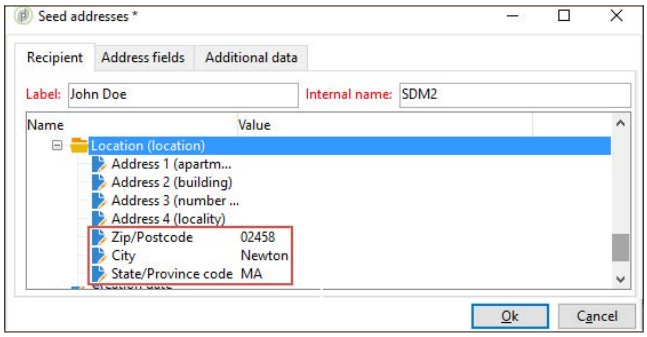
17. Click **Finish**.
18. Click the **Seed addresses** tab, and click **Add**.



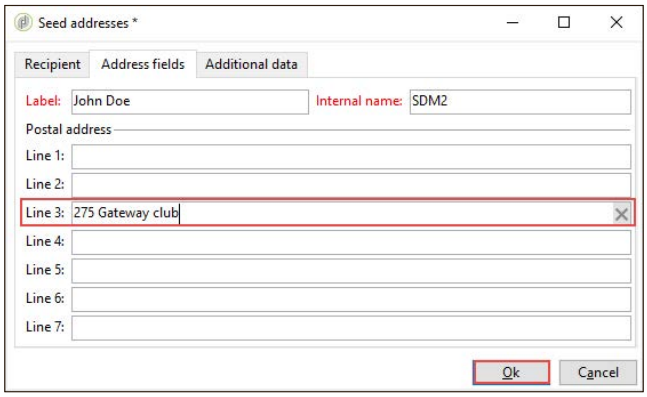
19. On the **Recipients** tab, enter **John Doe** in the **Label** field. Refer to the screenshot in the next step.
20. Click the **Value** column to enter values for the lines that correspond to **First name** and **Last name**. For example, click the **Value** column for **First name** and enter **John**.



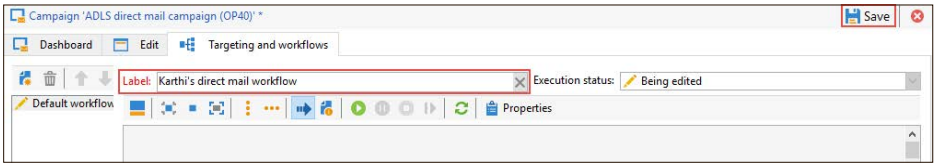
21. Scroll down and enter the values (in the screenshot) for the Location: **Zip/Postcode**, **City**, and **State/Province code**.



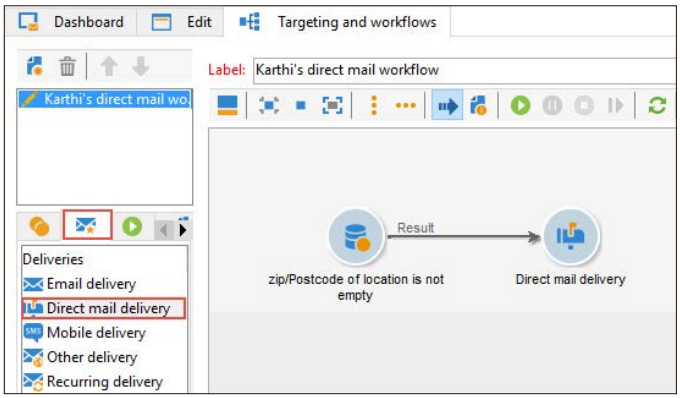
22. Click the **Address fields** tab and enter the street address on Line 3.



23. Click **OK** on the **Seed addresses** dialog box and then click **Ok** to close the **Advanced settings** dialog box.
24. Click **Save** in the upper right to save your campaign.
25. Click the **Targeting and workflows** tab of the campaign.
26. In the **Label** field, rename the default workflow to **<your name>'s direct mail workflow.**



27. Click **Save**.
28. Add a **Query** activity to target recipients whose **Zip/Postcode (location/@zipCode)** is **not empty**.
29. Click **Finish** and click **Ok**.
30. Click the **Deliveries** icon, drag a **Direct mail delivery** activity onto the workflow diagram, and place it in sequence after the query activity.

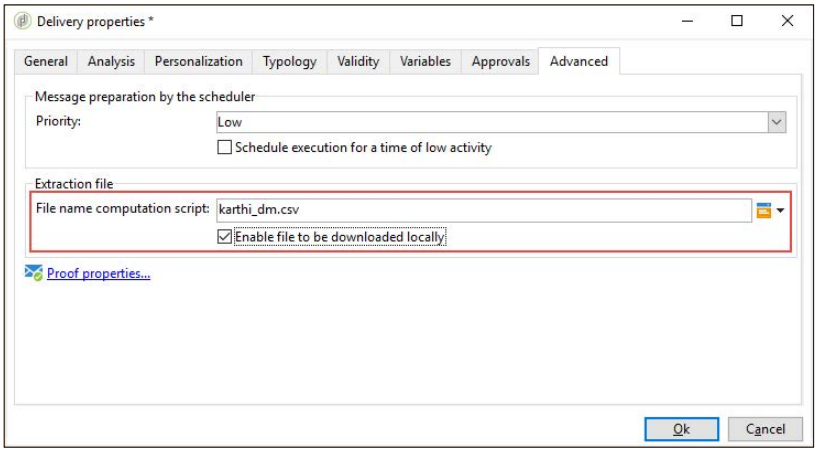


31. Double-click the **Direct mail delivery** activity. In the **Label** field, enter **<Your name>'s direct mail delivery**.
32. Click **Continue**.
33. Click **Save** to save the workflow.

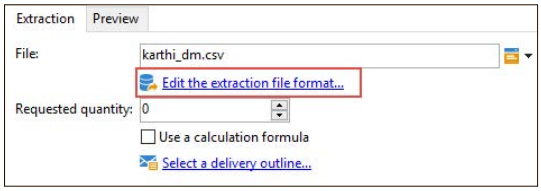
Task 2: Edit the delivery and format the extraction file

Edit a direct mail delivery. This exercise shows you how to configure the extraction filename and format the extraction file. You will also enable an extraction file download.

1. Go to the **Campaigns** dashboard, and open the delivery activity you just created (<**your name>'s direct mail delivery**) by double-clicking it.
2. Click **Properties**, and then click the **Advanced** tab.
3. In the **Extraction File** area, for the **File name computation script** field, enter: **<your name>_dm.csv**
   For example: joe_dm.csv
4. Select **Enable file to be downloaded locally**, and then click **Ok**.

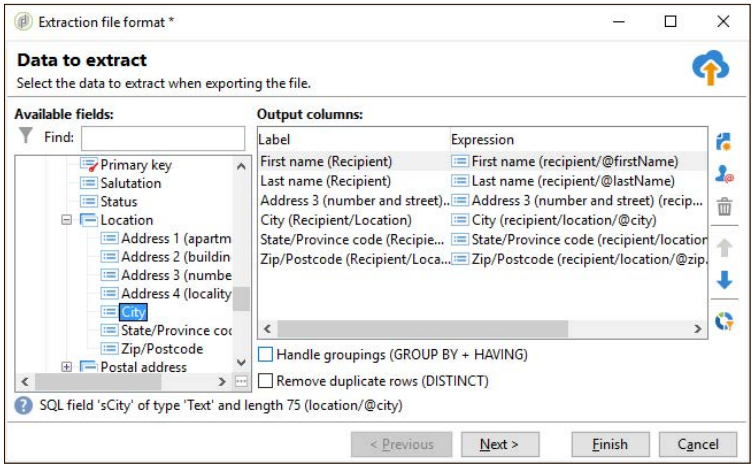


5. Back on the delivery window, click **Edit the extraction file format.**

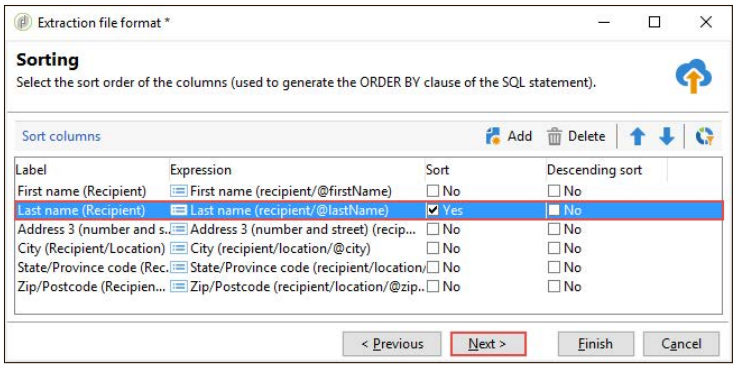


6. In the **Data to extract** dialog box, scroll down in the **Recipient delivery log** attribute column and click "**+**" to expand the **Recipient** node.
7. Double-click **First name** and **Last name** to add them to the **Output columns**.

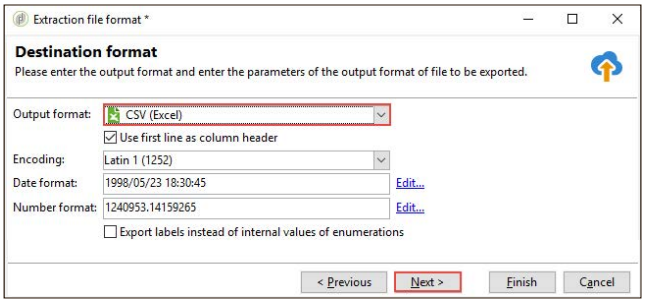
8. In the **Recipient** node, click "+" to expand the **Location** subnode.
9. Double-click **Address3 (number and street)**, **City**, **State/Province code** and **Zip/Postcode** to move to **Output columns**. The final set of output columns should look like:



10. Click **Next**.
11. On the **Sorting** screen, select the **Sort** checkbox in the **Last name(Recipient)** row. The sort changes from **No** to **Yes**. This is required if the seed address is based on the sort order. Optionally, reorder output columns.



12. Click **Next**.
13. In the **Destination format** dialog box, change the **Output format** to **CSV (Excel)**.



14. Click **Next**.

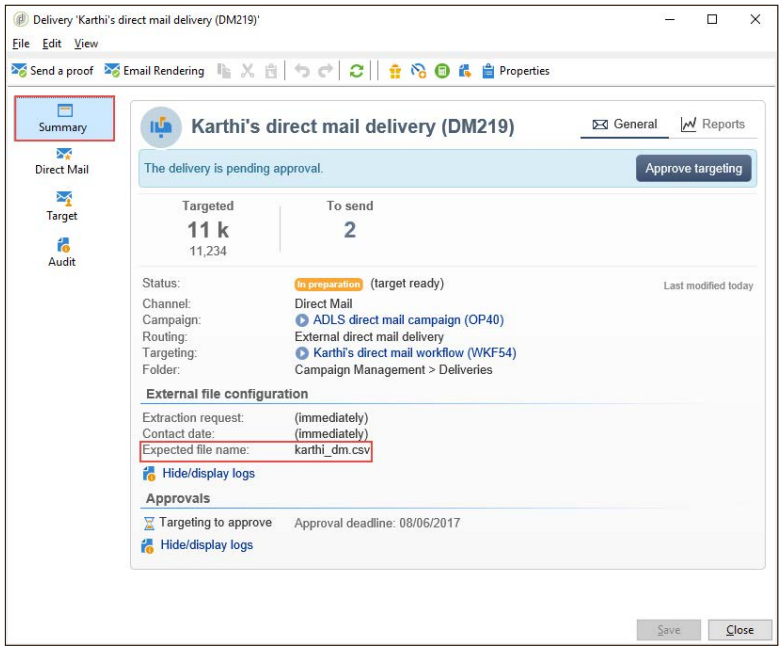
15. In the **Data formatting** dialog box, click **Finish**.

16. Click **Ok**, then click **Save**.

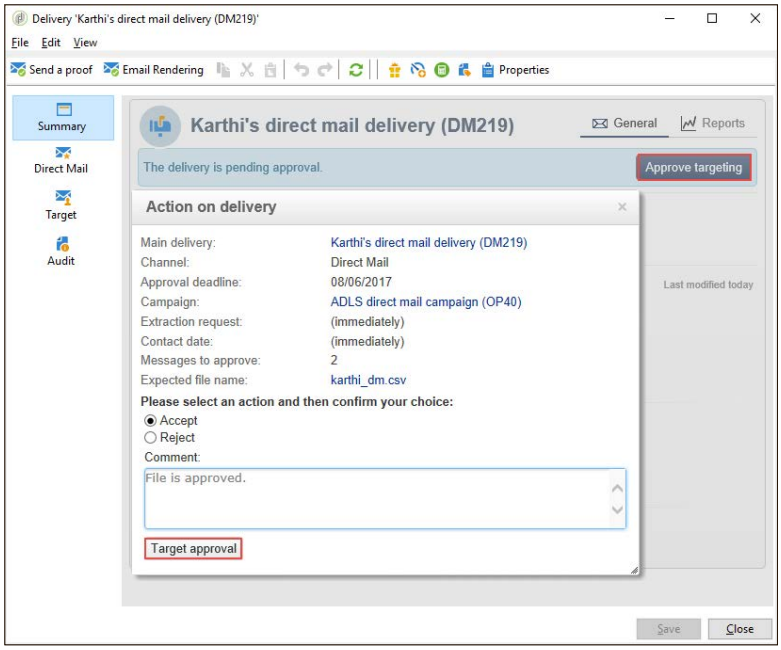
Task 3: Execute the direct mail delivery

Execute a direct mail delivery and download the extraction file.

1. Start the workflow by clicking the green **Start** button..
2. Go to the campaign dashboard.
3. Open the direct mail delivery (**<Your name>'s Direct Mail Delivery**).
4. View the analysis results by clicking **Audit** in the left navigation pane.
5. Click the **Causes of exclusions** tab and examine the causes of exclusions.
6. View the output file name by clicking the **Summary** tab in the left navigation pane.



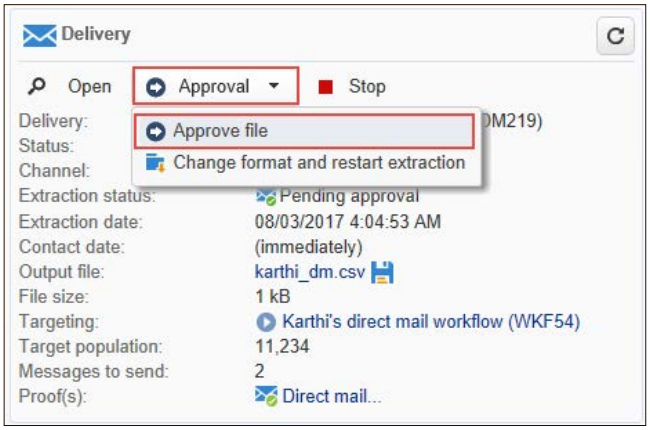
7. Click **Approve targeting** in the upper right.



8. When the **Action on delivery** dialog opens, click **Target approval**, and close the delivery.

9. Refresh the dashboard.

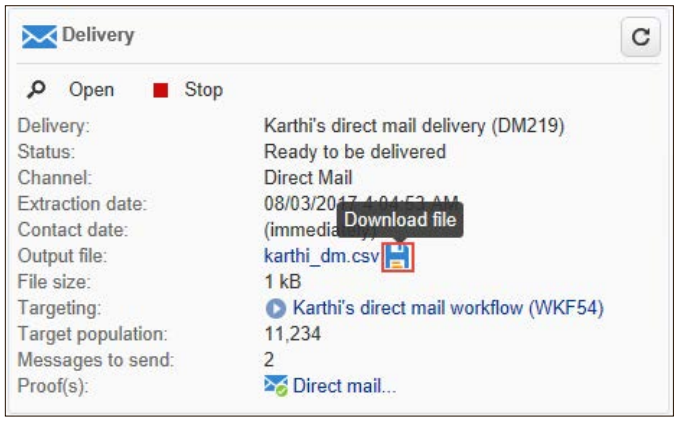
10. Click **Approve file**.



11. In the **Action on delivery** dialog box, select **File Approval** to approve the extraction file.

12. Refresh the dashboard.

13. In the **Delivery** area, click the **Download file** icon to download the extraction file. The **Download files of the delivery** dialog box opens.



14. In the **Download files of the delivery** dialog box, in the **Local name** field, click the folder icon and select a location, then click **Save**. The location is added to the **Download files of the delivery** dialog box.
15. In the **Download files of the delivery** dialog box, click **Download**.
16. After downloading the file successfully, close the window and view the local file.
17. Look for the seed address you provided.