



Campaign Manager

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Description

The ProFusion Ultra IS Campaign Manager is a PURL (personalized URL) generator application. This application allows a company to create customized pages with merged unique content based on each users personalized URL.

ProFusion UIS | View Website **PROFUSION** Website Backend | Profile | Quick Links | Logout

CONTENT

- Home Page
- Inner Pages
- Sitemap
- Terms and Conditions
- Privacy Policy
- Vertical Column Section
- Footer Section

SECURE USERS

- Register Page
- Login Page
- Registered Users
- Users Page Content
- Secure Zones/Pages

WEBMASTER

- Change Profile
- Change Password
- Settings
- Flash Images
- Header Images

ADVANCED FEATURES

- Campaign Manager
- Mini Sites

Welcome to the backend of JuneQss3

Please follow the links on the left column to proceed

The Date and Time on the servers is currently 7/7/2011 2:04:58 PM

Storage

Free Space	Used Space
1025.24 MB	24.76 MB
File System : 979.3 MB	File System : 20.7 MB
Database : 45.94 MB	Database : 4.06 MB

Quick Links

- General Help
- User Manuals and Product Videos
- Support Center
- Editor Help
- Editor Template Variables
- License Agreement

Finding the Module

The left side of the main administrative page is divided into various sections. Each section deals with a specific functionality of the ProFusion Ultra IS application like Content, Secure Users, Help, Webmaster, Advanced Features, etc. Campaign Manager can be found under the Advanced Features heading.

Start a New Campaign

1. Click **Campaign Manager** under the Advanced Features section of the admin page. This will take you to a Campaigns List page like the one shown below.



The screenshot shows the 'Manage Campaigns' section of an admin interface. At the top, there are links for 'Manage Campaigns' and 'Download CSV'. Below this is a breadcrumb trail 'Home » Campaign List' and a button labeled '[Start New Campaign]'. To the right, there is a dropdown menu for 'Select Campaign Type' set to 'All'. A table with columns 'TITLE', 'START DATE', 'EXPIRY DATE', and 'CUSTOMERS' is shown, but it contains no data, with a message '-- No Records Found --' in red text. A legend at the bottom left identifies icons for Active Campaigns (checkmark), Ongoing Campaigns (red circle), Expired Campaigns (yellow square), and New Campaigns (blue square).

2. Click **[Start New Campaign]** on the left. This will take you to the Campaign Details page like the one below. **Complete** the form:
 - a. *Campaign Name*— This field allows you to quickly identify the campaigns from the backend. This name is only visible on the backend.
 - b. *Customer Data*— This field allows you to upload a CSV file which includes all of your relevant customer information such as name and company. Click **Sample CSV File** to see an example. You will need to save after uploading this field for the TPL variable to appear in the content editor area.
 - c. *Start/Expiration Date*— This field allows you to set the time period during which the campaign offer will be available.
 - d. *Acceptance Text*— This field allows you to enter text which can be checkmarked to accept the offer or invitation. ([see figure 1.0 below](#))
 - e. *Campaign Text*— This field allows you to enter the text body of the campaign. Merge in fields from your CSV file by selecting them from the **Campaigns** TPL dropdown to personalize this text for your customers.

Note: You can also create a mobile version of the campaign by entering the campaign text in the mobile page editor just as you would in the regular editor. This allows users to easily view and accept the offer on a mobile device. Click the Mobile Page button (shown in green below) to access the mobile page editor.

- f. *Upload Header Image*— This field allows you to upload or use a pre-existing header for your campaign.
- g. *Is Active*— This check box determines whether or not this campaign is currently active.

Note: If any merged field is missing from the CSV for a customer, that area will show blank. Always make sure that all merged fields are completed on the CSV.

Figure 1.0

Manage Campaigns **Download CSV**

Home » Campaign list » Create Campaign

UPDATE CAMPAIGN DETAILS
*(fields marked * are mandatory)*

Campaign name*	<input type="text" value="January"/>
Customer data <i>(Upload CSV File or/and Import from Profusion Mailer)</i>	<input type="text"/> <input type="button" value="Browse..."/> Sample CSV File
Start Date*	1 Jan 2012
Expiration Date*	1 Feb 2012
Acceptance Text*	<input type="text" value="I'd love to take you up on this offer!"/>
Campaign Text*	<input type="text"/>

Page Content Width of Editor Managed Content 800px

Template Variables | Forms | Campaigns

[TPL_FirstName]

Here's a special offer just for you! ProFusion Products would like to offer you 15% off all purchases made in January.

This includes all Ultra IS applications and modules, as well as all pre-paid SEO and maintenance packages.

We know you've taken advantage of our special offers in the past. Here's another chance to make [TPL_Company] a top competitor in the field!

Don't miss out on this amazing offer!

<BODY> <DIV>

Upload Header Image **[Please check the appropriate radio button]**

Header Image
(Recommended size 1000X192 pixels)

OR

Existing Image

Is Active

3. Click **Save** to create your campaign. You will be taken to a Campaign Created Successfully page like the one below which will show you if there were any CSV file errors which did not allow a customer to be processed.

Campaign created successfully	
Customer Data Report	
Total Customers Found:	25
Customers Processed:	25
Customers Unprocessed:	0
<input type="button" value="Ok"/>	

4. Click **Ok** to be taken back to the Campaign List page, which will now look like the one below (figure 2.0) with the campaign that was just created.

Manage Campaigns **Download CSV**

Home » Campaign List

Campaign(s) Deleted Successfully.

[Start New Campaign] Select Campaign Type: All ▾

Showing 1 - 1 of 1 « First | Previous Page 1 of 1 ▾ Next | Last »

			TITLE	START DATE	EXPIRY DATE	CUSTOMERS
✓	Ⓞ	☐	July	21-Jul-2011	21-Aug-2011	➔ [25]


Activate Campaign(s) ▾

Legend

- ✓ Active Campaigns
- Ⓞ Ongoing Campaigns
- Ⓜ Expired Campaigns
- Ⓝ New Campaigns





5. You can edit a campaign by **Clicking** on the name of the campaign from this screen which will take you back to the page where you entered the campaign data.

Add/Edit Customers


Click the  arrow under Customers. This will take you to a page like the one below which shows all of the customers you have merged into this campaign.

[Add Customer] [Download CSV] Select Campaign: July .. ▾

Showing 1 - 4 of 4 « First | Previous Page 1 of 1 ▾ Next | Last »

	<input type="checkbox"/>	NAME	COMPANY	UNIQUE URL	VIEW DATE
	<input type="checkbox"/>	Bob Reynolds	ProFusion Products	Bob.Reynolds.01	
	<input type="checkbox"/>	Patrice Valentine	ProFusion Products	Patrice.Valentine.03	
	<input type="checkbox"/>	Peg Emmons	ProFusion Products	Peg.Emmons.04	
	<input type="checkbox"/>	Nate Quinn	ProFusion Products	Nate.Quinn.02	

Delete Customer(s) ▾

Legends
✓ Customer has accepted the Campaign.
✗ Customer has rejected the Campaign.
 Customer has not viewed the Campaign.

To Add a New Customer:

1. Click [Add Customer]. This will take you to the Enter Customer Detail page as shown on the right.
2. **Type** the appropriate information into the appropriate fields. The only fields which will be used are those which have been merged into the text of the campaign. Be sure to enter all merged fields.
3. Click to add the new customer. They will now appear on the Customer List shown above.

To Edit a Customer

1. Click on the name of the customer you wish to edit on the Customer List page shown above. This will take you back to the Edit Customer Detail page to the right.
2. **Type** the appropriate changes or additions and Click to save the changes.

ENTER CUSTOMER DETAIL
(fields marked with * are mandatory)

Campaign Name

Title

First Name *

Last Name *

Company Name

Address1

Address2

City

State

Zip

Phone

Fax

Email Address: *

Tracking Number

Custom1

Custom2

Custom3

Custom4

Custom5

Custom6

Custom7

Custom8

Custom9

Custom10

View Customer Response

Once customers receive the campaign messages with links to their PURLs, you can see if they have viewed the campaign, and if they accepted or rejected the offer presented to them. To view this information

1. **Click** on Manage Campaigns. This will take you to a page like the one shown in figure 2.0.
2. **Click** on the green arrow under Customers. This will take you to a page like the one below.

You can see that both Bob and Nate viewed their campaigns on 1/19/2012 (inside the blue box) and that Nate accepted the offer while Bob rejected it (inside the red box). The symbol legend (in purple) explains the symbols used to show unviewed, accepted, or rejected offers.

Manage Campaigns **Download CSV**

Home » Customer List

[Add Customer] [Download CSV] Select Campaign: January .. ▾

Showing 1 - 2 of 2 < First | Previous Page 1 of 1 ▾ Next | Last >

	NAME	COMPANY	UNIQUE URL	VIEW DATE
<input checked="" type="checkbox"/>	Nate Quinn	NSNA	Nate.Quinn.02	1/19/2012 4:12:21 PM
<input checked="" type="checkbox"/>	Bob Reynolds	NSNA	Bob.Reynolds.01	1/19/2012 4:11:31 PM

Search Customer(s)

Legends

- Customer has accepted the Campaign.
- Customer has rejected the Campaign.
- Customer has not viewed the Campaign.

Preview PURL

1. Click the Unique URL you wish to preview. (You could also click [Preview](#) at the bottom of the [Campaign Details](#) page) This will take you to a page like the one below.

The screenshot shows a web page with a navigation bar at the top containing links: Home, Dealer Resources, Getting Started, Dealer Levels, Why ProFusion?, and Contact Us. Below the navigation bar is a yellow curved banner with a smiley face icon and the text: "Good news! We are expanding our dealer network and YOU are invited to participate. [Read More...](#)".

Below the banner, the text reads: "Nate," (highlighted in a red box), "Here's a special offer just for you! ProFusion products would like to offer you 15% off all purchases made in July. This includes all Ultra IS applications and modules, as well as all pre-paid SEO and maintenance packages. We know you've taken advantage of our special offers in the past. Here's another chance to make [ProFusion Products](#) a top competitor in the field! Don't miss out on this amazing offer!"

At the bottom of the page, there are two links: [Yes I am Interested in this Offer!](#) and [No Thanks](#).

Note: all PURLs should look identical except for the merged fields.

2. Click [Yes I am Interested in this Offer!](#) at the bottom of the page. You will be taken to a page like figure to the right. (Clicking "No Thanks" will reject this offer, and can be seen by the admin on the backend.
3. Enter your information and click the check box next to "I'd love to take you up on this offer!" (**Note:** this is the [acceptance text](#) which was entered while configuring the campaign) to accept.

Note: The text inside the red boxes in these figures is the merged CSV fields.

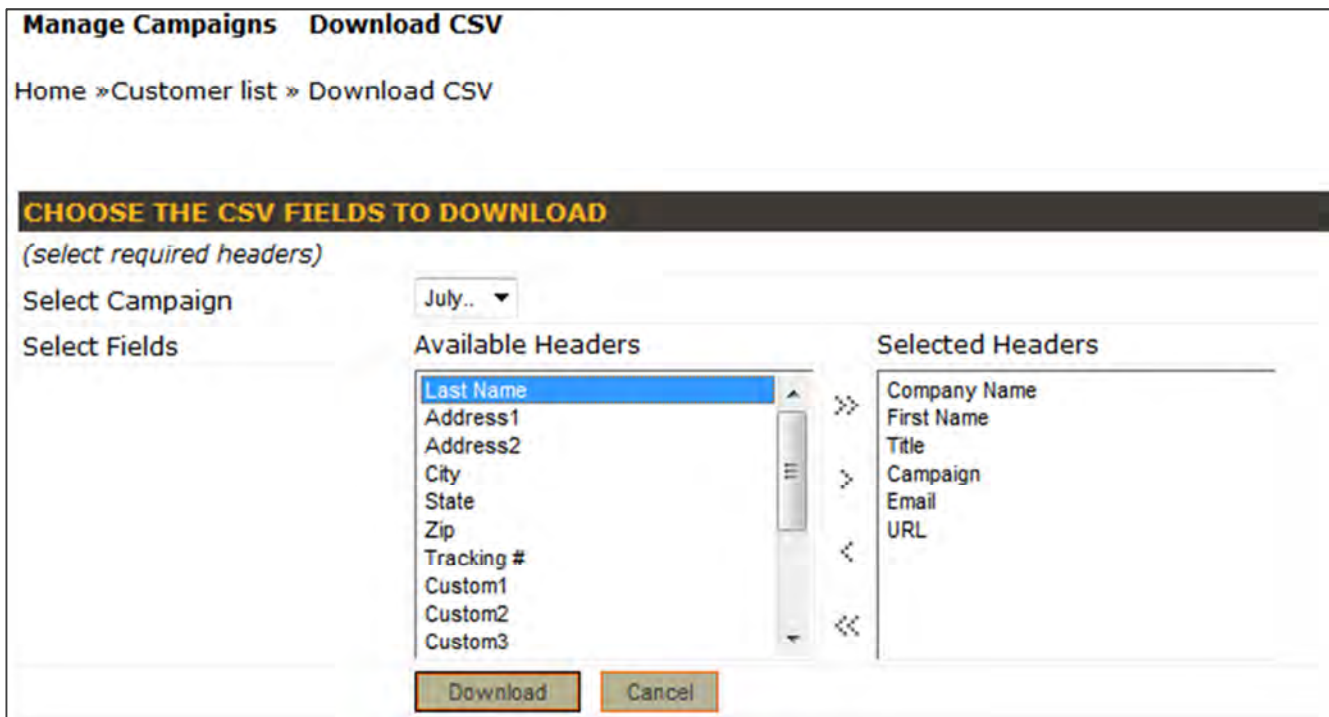
The screenshot shows a registration form titled "July" with the following fields and values:

- Registration Form:
- Title: Mr.
- First Name: Nate
- Last Name: Quinn
- Company Name: ProFusion Products
- Address1: (empty)
- Address2: (empty)
- City: (empty)
- State: (empty)
- Zip: (empty)
- Phone: (empty)
- Email: email@email.com

At the bottom of the form, there is a checkbox labeled "I'd love to take you up on this offer!" which is checked and highlighted in a red box. Below the checkbox is a "Submit" button.

Export PURL Data

1. Click [Download CSV] on the Customer List page. This will take you to a page like the one shown below.



The screenshot shows a web interface for downloading CSV data. At the top, there are tabs for 'Manage Campaigns' and 'Download CSV'. Below this is a breadcrumb trail: 'Home » Customer list » Download CSV'. A prominent yellow banner reads 'CHOOSE THE CSV FIELDS TO DOWNLOAD' with the instruction '(select required headers)'. There are two dropdown menus: 'Select Campaign' set to 'July..' and 'Select Fields'. The 'Available Headers' list includes: Last Name, Address1, Address2, City, State, Zip, Tracking #, Custom1, Custom2, and Custom3. The 'Selected Headers' list includes: Company Name, First Name, Title, Campaign, Email, and URL. Navigation arrows (single and double chevrons) are used to move items between the two lists. At the bottom, there are 'Download' and 'Cancel' buttons.

2. Click to highlight the fields that you wish to download in your CSV and click the > arrow to add one highlighted field at a time, or click the >> arrow to add all of the fields to the Selected Headers box. Inversely, Click the either the < arrow or the << arrow to remove either one highlighted or all of the fields from the Selected Headers box.

Note: You only need to select the fields you wish to export to the CSV file. The URL field is the PURL you have just created.

3. Click  to download the CSV file.

You can now use this file in the Ultra IS Mailer, or take it to a printer to create personalized direct mailers.