InfoIMAGE

Message Manager 3.0 Campaign Set Up
User Guide

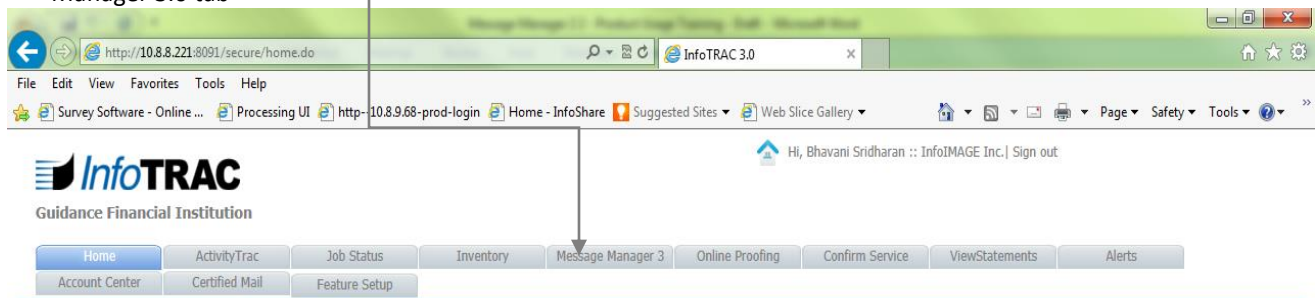Date: July 2013

Contents
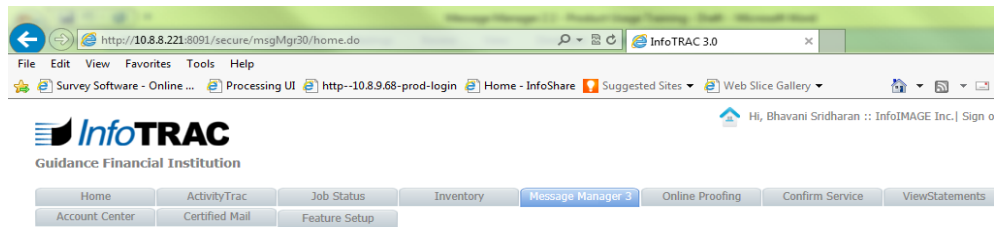
Message Manager 3.0: Campaign Set Up Manual User Guide

1.0   Message Manager 3.0 Overview

1. Once you have logged onto InfoTRAC you can access the Message Manager 3.0 screen by clicking on the Message Manager 3.0 tab

2. The Overview screen (the dashboard) will show the list of all campaigns that have been created in Message Manager 3.0 and the status of each campaign. There are 4 tabs, one listing a summary of ALL campaigns, and the other 3 tabs displaying a filtered view based on the status of the campaign (Scheduled, Draft, Completed).

3. The Status traffic lights key are as follows:

Red status– The campaign is still in draft mode and has yet to be approved.

Yellow status – the Campaign has been approved and scheduled to run based on dates.

Green status – the Campaign is in progress or has been completed.

4. Each campaign can have the following actions (title hovers will appear when you place the mouse over each button):

Edit button - If editing of the campaign details prior to the scheduled date of the campaign is required, click on this button. Once it has started, no further editing can be applied and this button will not be available.

Delete button – If a campaign is to be deleted, click on this button. If a campaign is in progress or has been completed, this button will not appear and the campaign cannot be deleted.

Approve button – Campaigns still in draft, this button can be used to approve a campaign so the campaign can be moved to the scheduled status.

Approve / Un-approve button – Once a campaign is scheduled but has yet to run, this button can be used to un-approve the campaign. Once a campaign is in progress or has been completed, this button can be used to generate a pdf sample of the campaign (the hover will appear as approve).

Copy button – Allows the campaign details to be copied to create a new campaign. This copy will be an exact replica of the original campaign so it is imperative that all of the details be reviewed before approval. The copied campaign will appear as a draft until approved.
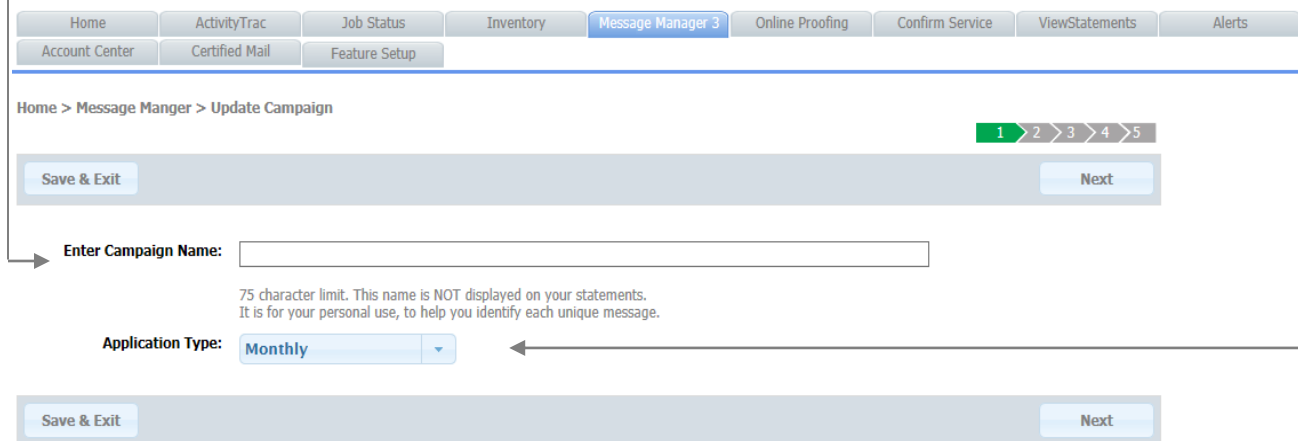
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2.0   Creating a New Campaign

There are 5 set steps to create a new campaign in Message Manager 3.0.

1   Creating the campaign

2   Setting up target market selection criteria

3   Create the default and target messages

4   Review campaign summary

5   Set up Schedule Dates and final approval of the campaign

2.1   Step 1: Creating the Campaign

1.   Click on the   **Create New Message**   button on the dashboard.

2.   Record the Campaign name allowing it to be easily identifiable. (*Please note that there is a 75 character limit.*)

3.   Select the application that the campaign will be used in. Please note once the application has been selected and you have moved onto Step 2 or have Saved & Exited the screen, you will no longer be able to change the application type.

4.   Click on   **Next**   to move to step 2

Home	ActivityTrac	Job Status	Inventory	Message Manager 3	Online Proofing	Confirm Service	ViewStatements	Alerts
Account Center	Certified Mail	Feature Setup						

Home > Message Manger > Update Campaign

1 > 2 > 3 > 4 > 5

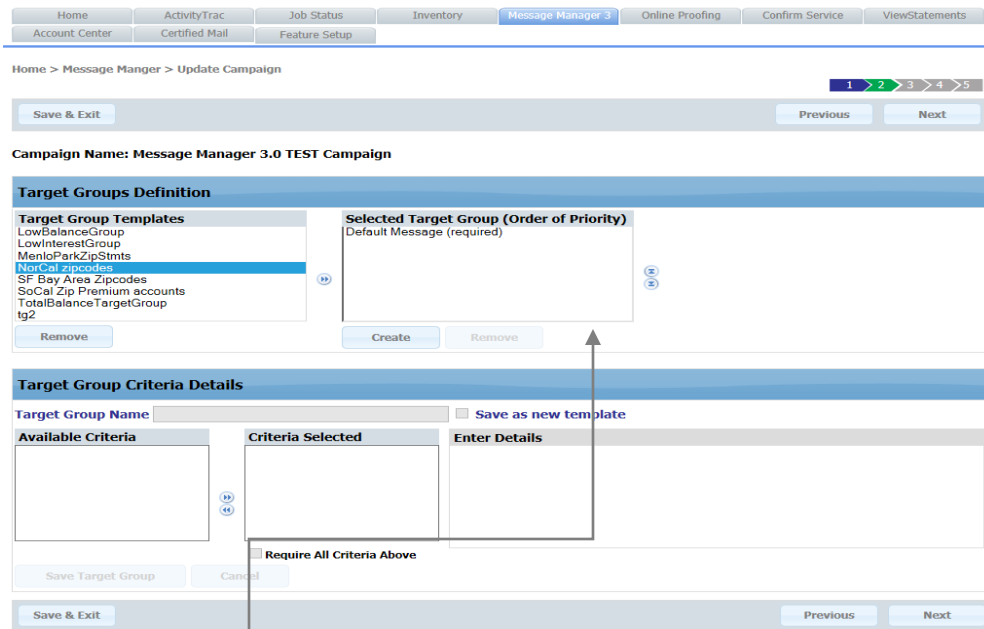| Save & Exit	Next

Enter Campaign Name:

75 character limit. This name is NOT displayed on your statements.
It is for your personal use, to help you identify each unique message.

Application Type: Monthly

Save & Exit	Next

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2.2   Step 2: Setting up the Target Criteria

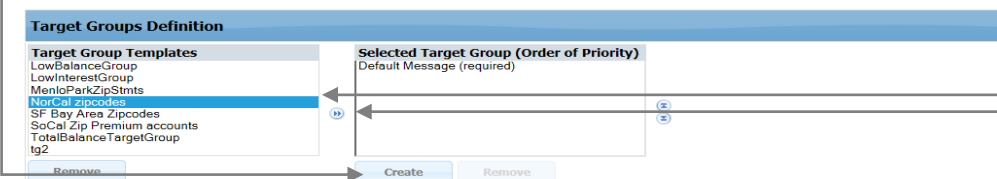This screen is split into 2 sections – Target Groups Definition & Target Group Criteria Details.
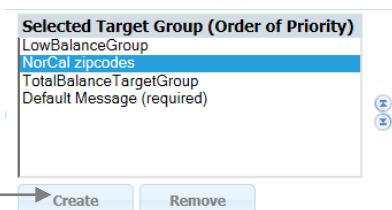

2.2.1   Target Group Definitions

The Target Group List allows up to 5 Message groups to be created per campaign (inclusive of the mandatory default message if an account does not match any other criteria).

1.   There are 2 ways to add a target group:

  a.   Create a new Target Group (*refer to section 2.2.2 on creating a new target group*)

  b.   Add a template that has been previously set up by highlighting the template required and hitting the ⏩ button (*refer to section 2.2.3 on creating and editing a template target group*)

2.   Confirm the order of priority of each of the criteria by highlighting each target group and using the toggle buttons ⇅ to place in the required order*. Please note that the order of priority with the highest at the top and the lowest at the end (which should be the default message group).*

3.   To remove any of the template groups, click on the Remove button

2.2.2   Creating a New Target Group

1. Click on the ⬜Create button located below the Selected Target Group box.
2. Record the Target Group Name allowing it to be easily identifiable.
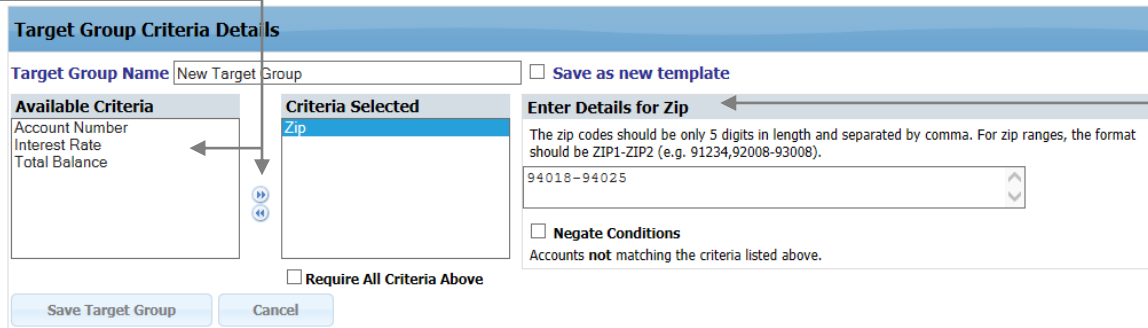3. Select the required criteria in the Available Criteria box and click on the ⓘ button to add it to the Criteria Selected box. *(The Criteria that is available has been specified during the implementation of Message Manager 3.0, and any additions will need to be requested via your Account Co-coordinator).*
4. Enter the requirements for the selected criteria in the details section to the right. For example, if zip is selected, record the zip code range. Note, an error will appear if the details are not as specified in the description.
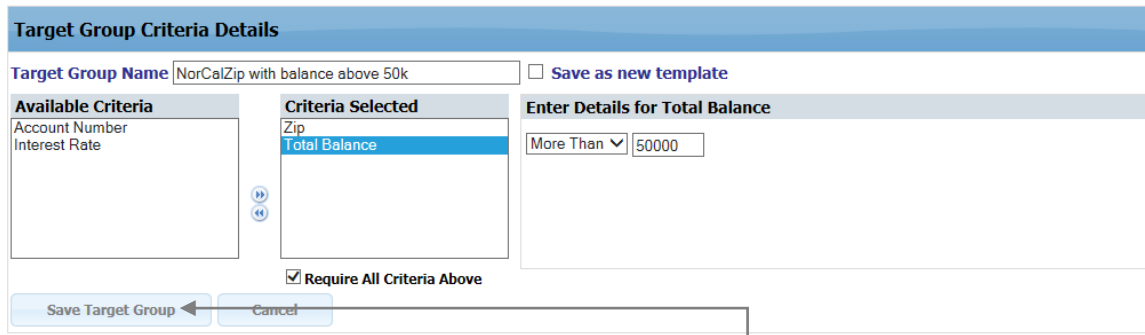
5. Continue to add any further criteria specifications surrounding that marketing message. If the message to be displayed needs to match multiple criteria, click the Require All Criteria Above, if however it only needs to meet only one of the specified criteria, this can be left unchecked.

    For example, a targeted message for members within a specific zip code AND with a Total Balance more than $50,000 would look like below

6. Once all the criteria have been selected, click on Save Target Group.

2.2.3   Creating and editing a template target group

1. To create a template target group, complete the process steps detailed in section 2.2.2 and check the box Save as new template prior to saving Target Group (step 6 above).

Target Group Criteria Details

Target Group Name NorCalZip with balance above 50k   ☐ **Save as new template**

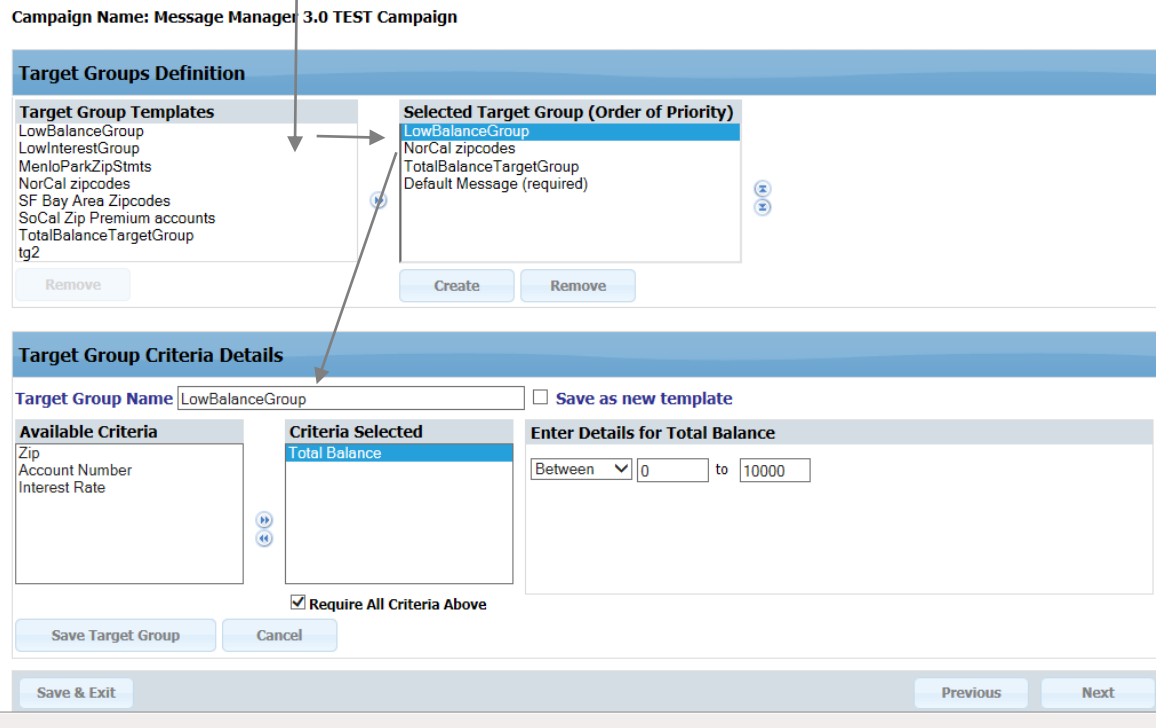2. To edit an existing template for a new campaign, add the template to the Selected Target Group box. The template criteria details will then be displayed below when you highlight the template.

Campaign Name: Message Manager 3.0 TEST Campaign

Target Groups Definition

Target Group Templates
LowBalanceGroup
LowInterestGroup
MenloParkZipStmts
NorCal zipcodes
SF Bay Area Zipcodes
SoCal Zip Premium accounts
TotalBalanceTargetGroup
tg2

Remove

Selected Target Group (Order of Priority)
LowBalanceGroup
NorCal zipcodes
TotalBalanceTargetGroup
Default Message (required)

Create   Remove

Target Group Criteria Details

Target Group Name LowBalanceGroup   ☐ **Save as new template**

Available Criteria
Zip
Account Number
Interest Rate
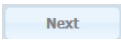
Criteria Selected
Total Balance

Enter Details for Total Balance
Between ▾ 0   to 10000

☑ **Require All Criteria Above**

Save Target Group   Cancel

Save & Exit   Previous   Next

3. Make the updates required to the Target Group Criteria details and click on Save Target Group. Any changes made to the template will ONLY apply to the current campaign, the template details will remain unchanged for any further campaigns.

4. If the template change is to be permanent, then save the updated template as a new template by checking the Save as a new template checkbox and update the name so that it will be unique.

Once all of the target message criteria have been set up, click on the [Next] **button to move to step 3.**

2.3 Step 3: Creating the Default and Target Messages

This screen allows each of the Selected Target Groups Messages to be set up. Ensure messages have been set up for each Target Group and the default group, if no message is required, the no message check box will need to be selected (refer to steps below)

2.3.1 Adding the Target Messages

1. Click on the Target Group and a pdf sample of the electronic statement with the message areas will be displayed *(please be aware that the below is a sample only and the message area for your statement may be in a different location – the location and type of area (text / image) will be set during the implementation process, please contact your account manager if you require any updates)*

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2. Click on the message area that is to be updated. If the message area is set for text, refer to section 2.3.2, if a graphic / QR code is to be added then refer to section 2.3.3

2.3.2 Recording a message set for text

1. Once the message area has been selected, the following screen will appear:

Text formatting toolbar →

Free text message box
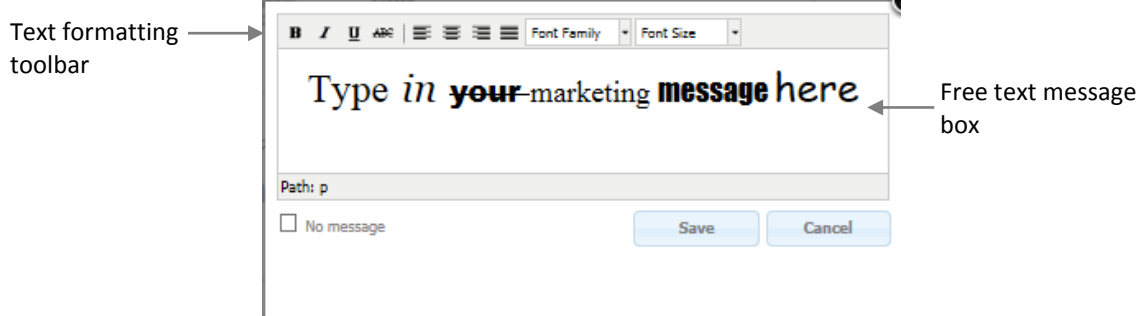
2. Record your message in the free text box (the character limit is set during the implementation process and based on the size of the preset area)
3. Apply the correct formatting by using the format toolbar above the text box
4. Click on **Save** and you will be returned to the pdf statement sample now incorporating the message that has been entered:

Message entered now appears on sample
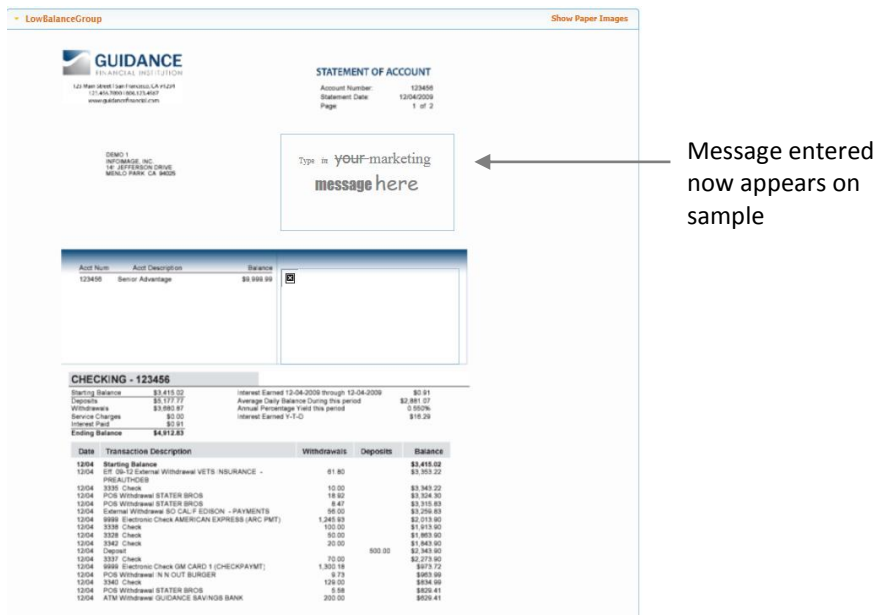
5. To update the message, just click back onto the message box and the message text box screen will appear (repeat steps 1 – 4 above)
6. If you do not want a message to appear for that target group, click on the No message checkbox and press Save

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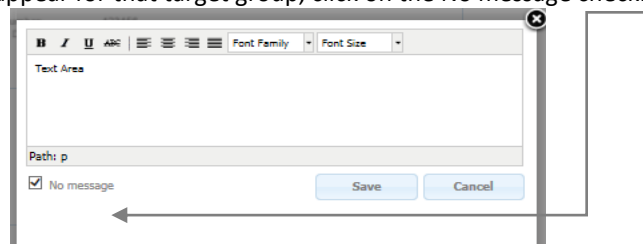
2.3.3   Recording a graphic message

1. Once the graphic message area has been selected, the following screen (split two sections)will be displayed:

New media upload
(image or QR code)

Upload New Media

◉ Image Upload   ○ QR Code Upload

◉ Upload File: [   ] Browse...
○ Media URL: [   ]

Name: [   ]   Add to Library

Previously loaded
media saved into
the library

Media Library

☐ Mirror content from eStatement to Paper statement

| eStatement | Paper Statement |

2. If new media is to be uploaded follow the steps outlined below
    a. To upload a new image from a file:
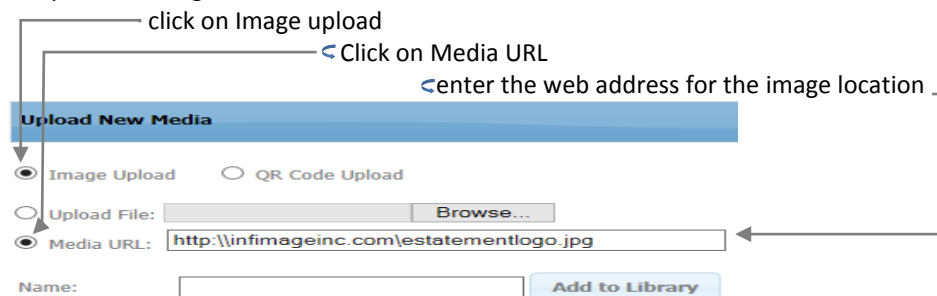
click on Image upload
⌐Click on Upload File
⌐Click on Browse and select image from the file directory

Upload New Media

◉ Image Upload   ○ QR Code Upload
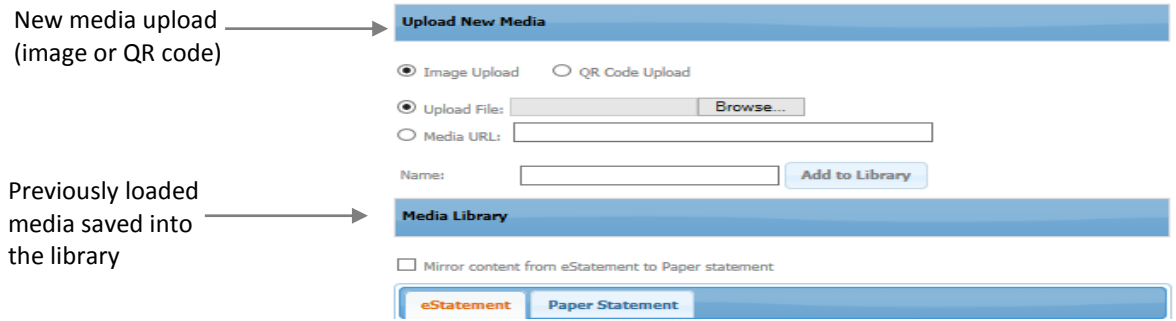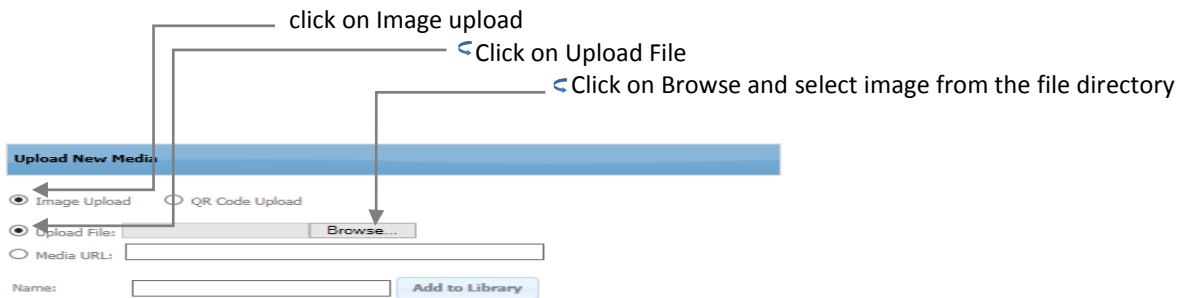◉ Upload File: [   ] Browse...
○ Media URL: [   ]

Name: [   ]   Add to Library

b. To upload an image from a website:
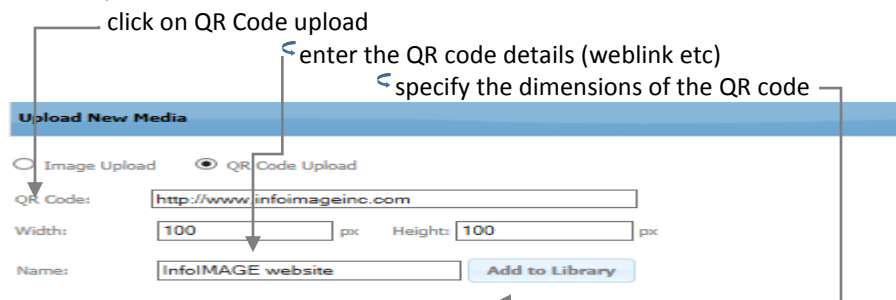
click on Image upload
⌐Click on Media URL
⌐enter the web address for the image location

Upload New Media

◉ Image Upload   ○ QR Code Upload
○ Upload File: [   ] Browse...
◉ Media URL: [http:\\infimageinc.com\estatementlogo.jpg]

Name: [   ]   Add to Library

c. To create a QR code

click on QR Code upload
⌐enter the QR code details (weblink etc)
⌐specify the dimensions of the QR code

Upload New Media

○ Image Upload   ◉ QR Code Upload
QR Code: [http://www.infoimageinc.com]
Width: [100] px   Height: [100] px

Name: [InfoIMAGE website]   Add to Library

3. Once the new media has been selected, type in a name (*be as descriptive as possible*) and click Add to Library

Name: [   ] Add to Library

4. Scroll down to the media Library and review the file list and select the image that is to be used in as the marketing message graphic. A preview of the image will appear to the right of the screen.

5. There is a tab set up for the electronic and paper delivery channel so that a different image can appear on each of the statement types. Click on the Paper Statement tab and follow step 4 above to select an alternate graphic for the paper statement. If the same image is to appear on both statement types, check the Mirror content from eStatement to Paper Statement checkbox.
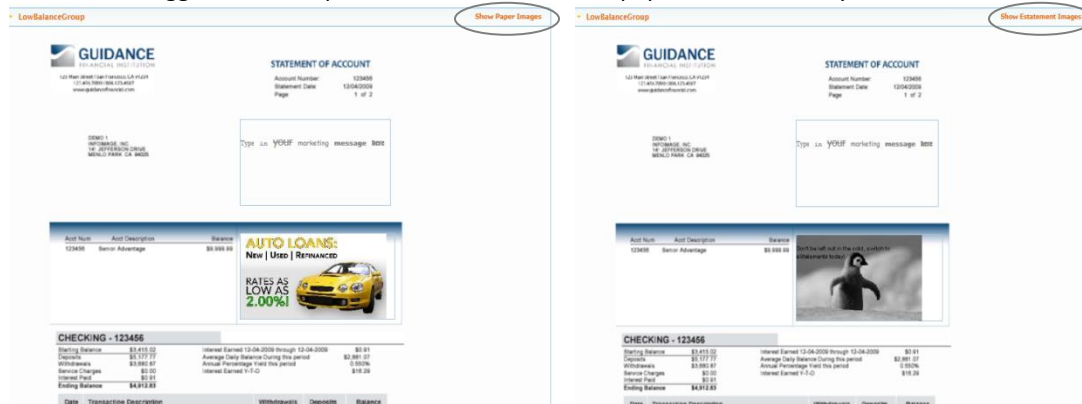
6. If do not want a message to appear for that target group, click on the Empty Message Content checkbox and press Save

7. A click through URL can be recorded for the eStatement graphic message by entering the URL in this space.

8. Text can be positioned over the graphic, record the required information and apply the formatting required in the free text box

9. Once completed, click on Save and you will be returned to the pdf statement sample now incorporating the message that has been entered.

10. Use the toggle button to preview the electronic and paper statements if you have used a different message.
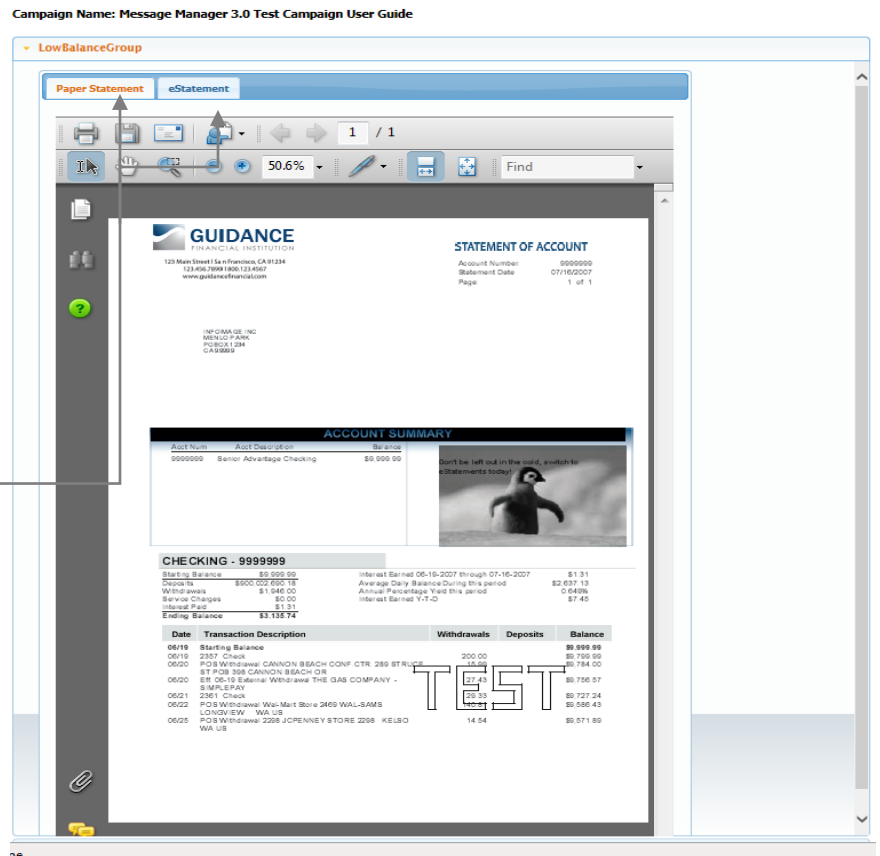
11. Once all of the messages have been recorded for all the target and default groups, click on Next to proceed to step 4.

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2.4   Step 4: Review Campaign Summary

This screen allows each of the Selected Target Groups Messages to be viewed in a pdf of the statement.
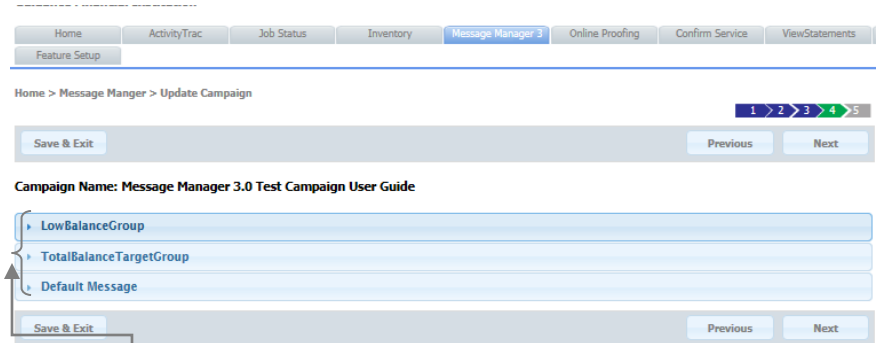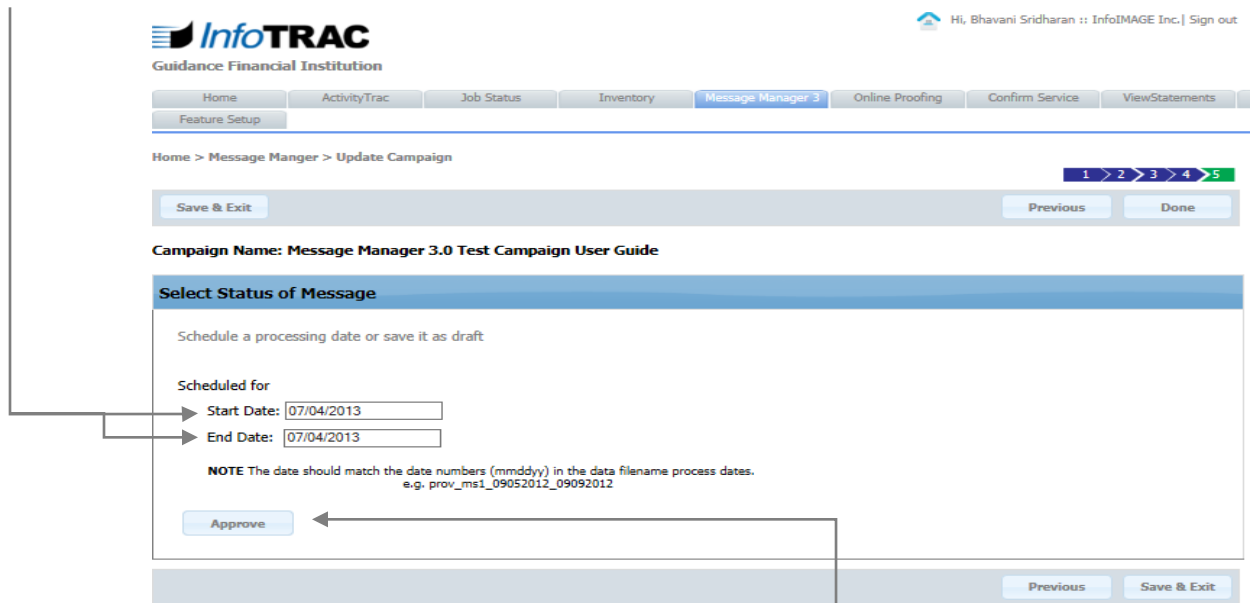

1. Click on each of the Target groups to review the pdf.

2. A toggle between the eStatement and the paper statement will appear on the top left corner to view each type.

3. If an update the message is required, click on the Previous button to go back to step 3 and update as required.

4. If the pdf images for all messages are correct, click on Next to proceed to the 5th and final step.

## 2.5   Step 5: Schedule Campaign and Approval

1. Select the start and end date for the campaign. Ensure that the date entered matches the date numbers (mmddyy) that appears in the date filename process date.


2. The final step is to approve the campaign, to do this, click on the Approve button.

3. An error message will appear if there have been any issues with the set up of the campaign. For example below, the dates recorded overlap with an existing campaign. If this occurs, go back and update the campaign details to rectify the issue.
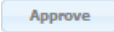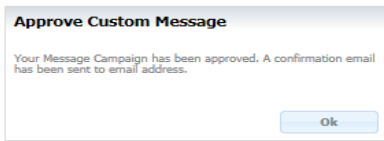

4. A final sample pdf for containing all versions message target group will be generated to approve. The first screen will display the Sample Paper Statement
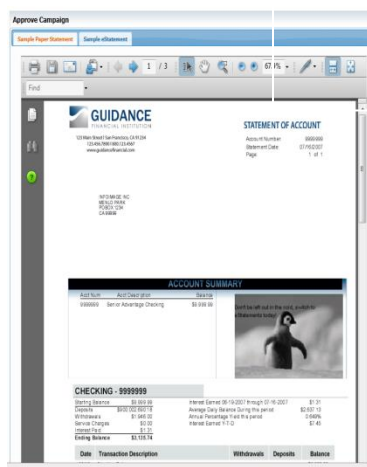
5. Click **Next** to preview the Sample eStatements.

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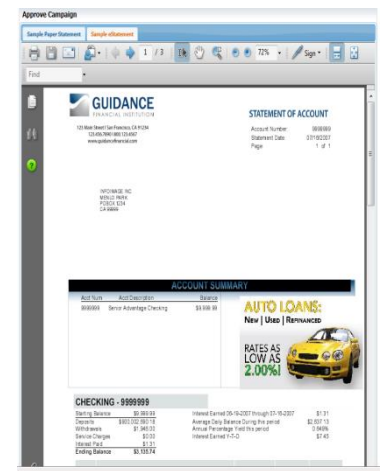
6. Once both communication channel statements have been reviewed, click on the Approve button and a confirmation screen will appear:

Approve Custom Message

Your Message Campaign has been approved. A confirmation email has been sent to email address.

Ok

3.0   Un-approving a scheduled campaign

1. In the main Message Manager screen, locate the campaign that is to be un-approved and click on the button.

2. The following screen will appear which you will be able to review details for each of the Message Target groups as well as the pdf samples displaying the messages.
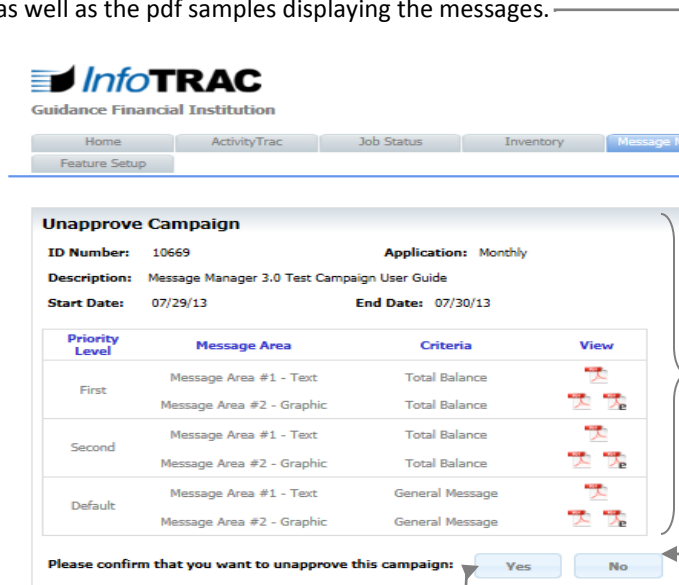
3. To confirm that you want to un-approve the campaign, click on Yes.

4. If after reviewing the details, the campaign can still be completed as scheduled, click No.

5. Once a campaign has been un-approved, it can be edited again. Click on to edit the campaign.

4.0   Copying an existing Campaign

1. If a campaign that has previously been completed, needs to be run again, click on the button associated with that campaign.
2. All of the previous campaign details will be copied over and a new "Copy of…" Draft campaign will be shown on the dashboard. Ensure that a new name for the campaign is recorded and review all of the details and update as necessary through steps 1 - 5.