



Design and Orchestrate Marketing Campaigns Using  
Adobe Campaign Classic



# STUDENT WORKBOOK

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## Design and Orchestrate Marketing Campaigns Using Adobe Campaign Classic

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## Module 1

# Adobe Campaign Classic Key Concepts and User Interface

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## Introduction

As a marketer, managing the day-to-day marketing activities and maintaining customer engagement can be difficult. Adobe Campaign Classic enables you to create, configure, execute, and analyze marketing campaigns. You can manage all marketing campaigns from a unified control center and consistently maintain the customer communication processes at all touchpoints.

## Objectives

After completing this module, you will be able to:

- Explain the features of Campaign Classic
- Explain the benefits of the Campaign Classic client console
- Verify the access to the Campaign Classic client console
- Explain the user interface (UI) elements of the Campaign Classic Home page
- Explain the key concepts in Campaign Classic
- Create a marketing plan, a program, and a campaign

## Campaign Classic: Features

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Campaign Classic enables you to:

- Create, manage, and track digital marketing campaigns
- Create a marketing database, manage profiles, import/export data, and edit queries
- Segment data and target audience segment
- Create and execute a campaign, create a marketing plan, personalize a campaign, route and track a campaign, create reports, and generate alerts and notifications

The features of Campaign Classic enable you to model, streamline, and automate marketing and customer communication processes with ease.

The following table describes the features of Campaign Classic:

Feature	Description
Multichannel communication	Campaign Classic enables you to send personalized emails, SMS, direct mail, and push notifications as part of your marketing campaigns. You can use a single interface to schedule, orchestrate, configure, personalize, automate, execute, and measure all your campaigns and communications.
Marketing Cloud integration	Campaign Classic 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, several solutions can be linked, as tenants, to Adobe Marketing Cloud.
Social marketing	Campaign Classic enables you to manage social networks. You can interact with customers through Facebook and Twitter.
Interactions	Campaign Classic enables you to send and manage marketing offers to customers. These marketing offers can be a basic communication or a promotion for a service or one or more products.
ACS connectors	The ACS Connector is an integrated feature in Campaign Classic that automatically replicates data to Campaign Standard, uniting the best of both applications.
Web API for Microsoft connectors	Web API for Microsoft connectors enable you to link your Adobe Campaign platform to 3rd-party systems, such as Salesforce.com, Oracle On Demand, Microsoft Dynamics CRM, and Microsoft Dynamics Online.
Email archiving BCC method	Campaign Classic enables you to archive emails by using a BCC address (invisible to the message recipients) to transfer an exact copy of the sent emails to a remote server.
Import/export files from an external server	Campaign Classic enables you to receive or send files, test for file presence, or list files on a server by using the File transfer activity. The protocol used is either Amazon Simple Storage Service (S3), File Transfer Protocol (FTP) or Secure File Transfer Protocol (SFTP).

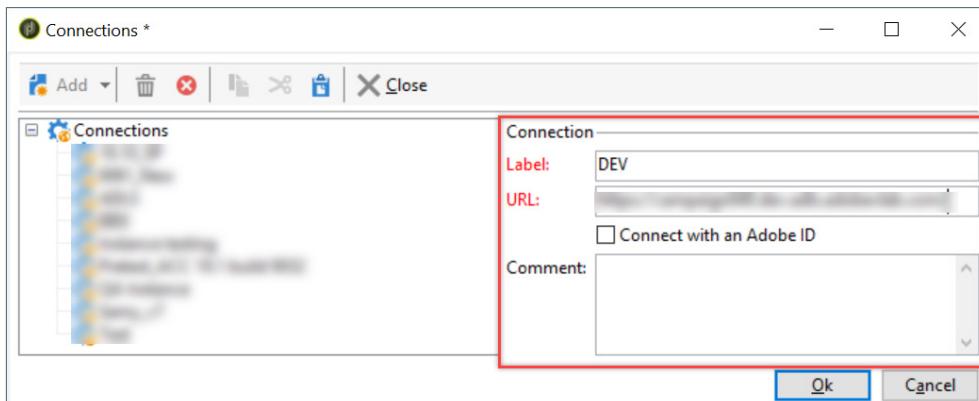
# Campaign Classic Client Console

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You can access the Campaign Classic platform by using a console or a web browser. When you access Campaign Classic through browser, you can only access Reports and perform approvals.

The Campaign Classic client console is a lightweight, browser-based application installed on your computer. The licensing is based on the number of users - not on the number of systems. So, you can install it on your desktop and your laptop.

The following screenshot depicts the Campaign Classic Client Console connections:



You can use Campaign Classic client console to:

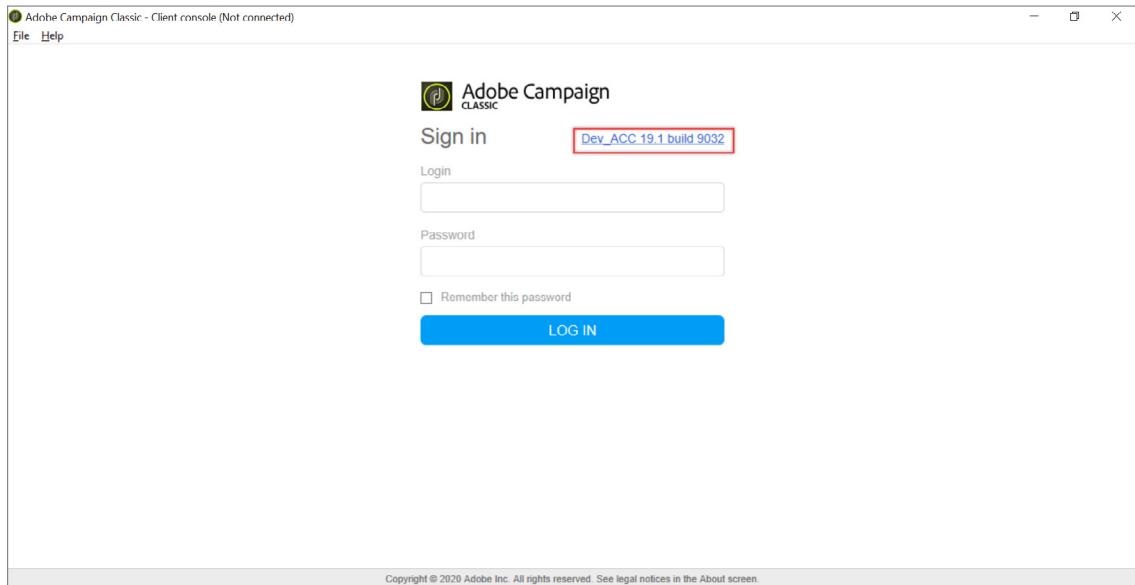
- Create and manage your connections to multiple environments, such as training, development, and production.
- Connect to multiple environments by opening multiple sessions of the client.

# Exercise 1: Verify the access to the Campaign Classic client console

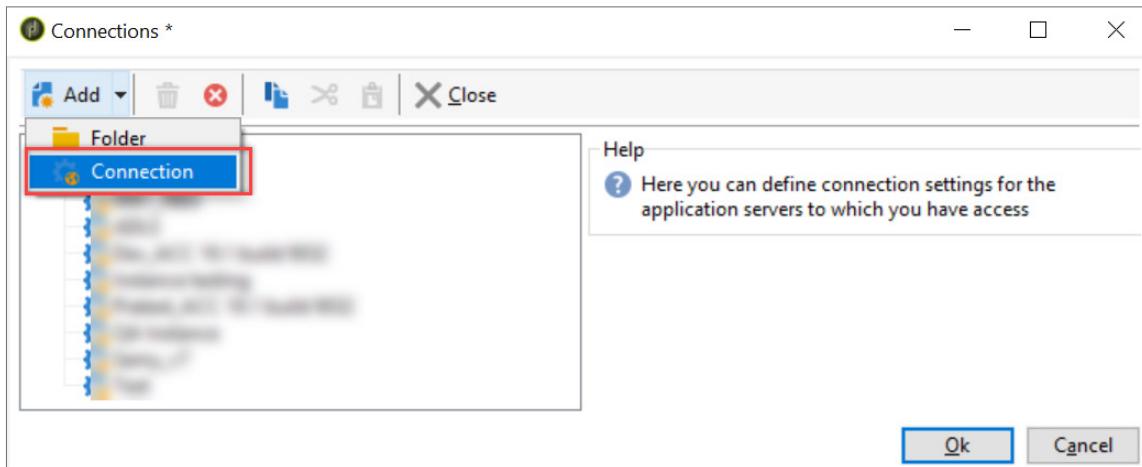
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In this exercise, you will add a connection and log in to the Campaign Classic client console.

1. On the **Start** menu, go to **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. A **New** connection is added to the **Connection** section.



4. In the **Connections** dialog box:

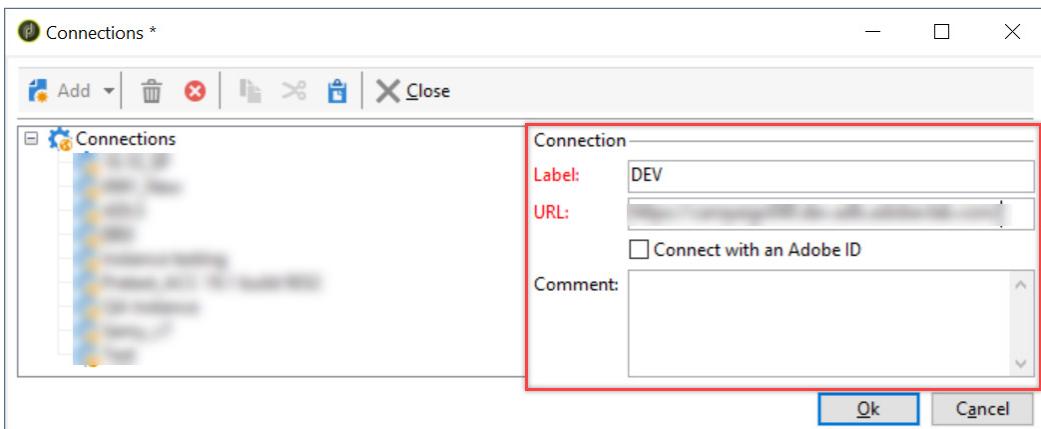
- a. In the **Label** field, type a connection name of your choice. In this exercise, you will type **DEV**.

**Note:** The **Label** field defines the instance you are connecting to, such as DEV or PROD or Training 51, so you know which instance you are in. The name that you provide in the **Label** field is also used as the Root of the Explorer tree view in Campaign Classic.

- b. In the **URL** field, type 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.adobevelab.com`

Your connection settings should look similar to the one shown:



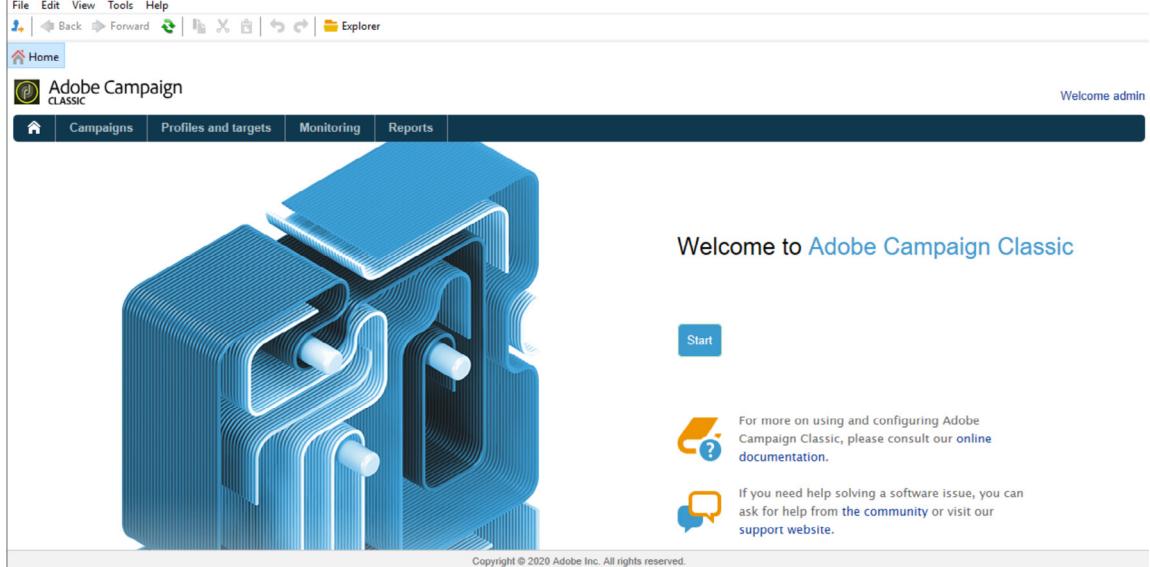
- Click **Ok**. The connection you just defined should be selected, as shown:

The screenshot shows the Adobe Campaign CLASSIC sign-in interface. At the top left is the Adobe Campaign logo with 'CLASSIC' underneath. To the right is a red-bordered box containing the text 'DEV'. Below the logo is the word 'Sign in'. Underneath are two input fields: 'Login' and 'Password', each with a corresponding empty input box below it. There is also a small checkbox labeled 'Remember this password'. At the bottom is a large blue button labeled 'LOG IN'.

- Type your credentials in the corresponding fields.

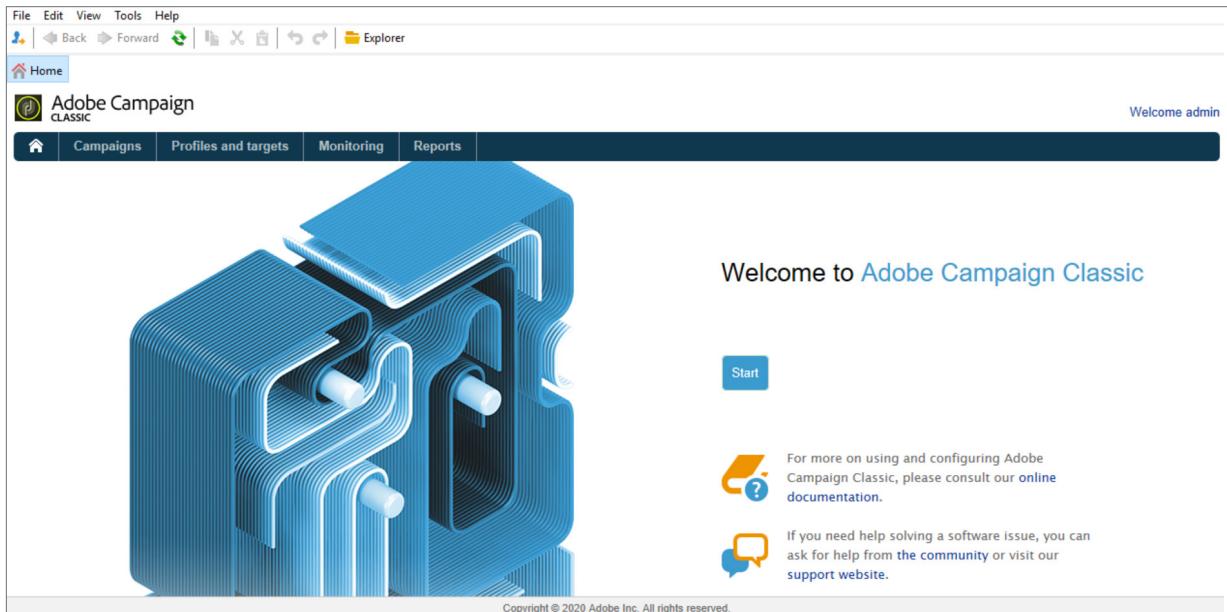
**Tip:** Log in to Campaign Classic using the credentials your instructor provided. The credentials are case sensitive.

- Select the **Remember this password** checkbox. When this option is selected, ensure no one else has access to your computer because this will allow them to log in without providing credentials but also have access to your data.
- Click **LOG IN**. You have logged on to Campaign Classic successfully, as shown:



# Campaign Classic Home Page: UI Elements

The Campaign Classic Home page is the business user's interface for marketers. The Home page will look similar to the one shown below:



The functionalities are grouped into different universes. The list of universes depends on the applications you installed and your access rights. All views in Campaign Classic, such as business user, developer, and administrator, are restricted by permissions that define what you can do and your area of responsibility. For example, you will not be able to view the Monitoring universe if you do not have admin rights to access the instance.

Each universe includes:

- A set of functionalities based on task-related needs
- Links and shortcuts that help you access applications, such as delivery, campaign, and recipient data

The following table describes different universes and their functions.

Universe	Function
Campaigns	The Campaigns universe enables you to view 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.
Profiles and targets	The Profiles and targets universe enable you to access the database of recipient profiles stored in Campaign Classic. In the Profiles and targets window, you can access recipients, lists, subscription services, and the existing targeting workflows and shortcuts to create workflows.
Social networks	The Social networks universe enables you to access over communities, Fans/Subscribers, Deliveries, Applications, and Campaigns.
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 on the Home page provides the Explorer view and that displays a full set of folders and configuration options. The Explorer view is divided into three zones, as shown:

The screenshot shows the Adobe Campaign Explorer interface with three main zones:

- Tree View:** On the left, a tree structure of campaign resources like Administration, Resources, Profiles and Targets, and Campaign Management.
- List View:** In the center, a table of recipients with columns for First name, Last name, Email, and Account. It includes a search bar for Last name and Email.
- Details View:** On the right, a detailed view of a selected recipient named Aaron Mark, showing General, Contact information, Other, and Lists tabs with various input fields.

- 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

# Campaign Classic: Key Concepts

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Some of the key concepts related to Campaign Classic are:

- **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.
- **Program:** A program helps define the marketing actions for a calendar period, such as launch, canvassing, and loyalty. Each program contains campaigns linked to a calendar that provides an overall view of the timeline of the campaign.
- **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. You can also create individual campaigns.
- **Workflow:** A workflow enables task automation and defines the logic of marketing campaigns. You can generate targets and segments, execute deliveries, manipulate files, approve campaigns, and notify operators by using workflows.

After creating a marketing campaign, you can start deliveries, and check the data, processes, and information related 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, campaign templates are centralized in the **Resources > Templates > Campaign templates** node of the Adobe Campaign tree. An empty template is supplied out of the box 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 the templates.

## Exercise 2: Create a marketing plan, a program, and a campaign

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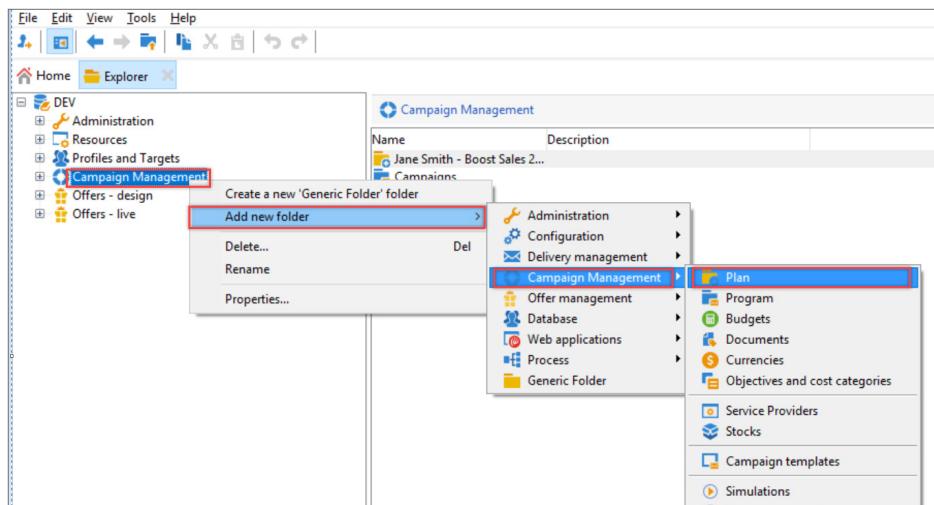
**Scenario:** You are working for the marketing team of We.Retail. To boost the sales for this year, you are planning to send out offers to customers. Before you create the campaigns to boost sales, your manager wants you to create a marketing plan and the associated programs that will come under the plan, so that you can create the campaigns.

This exercise includes the following tasks:

1. Create a marketing plan
2. Create marketing programs to support the marketing plan
3. Create a campaign

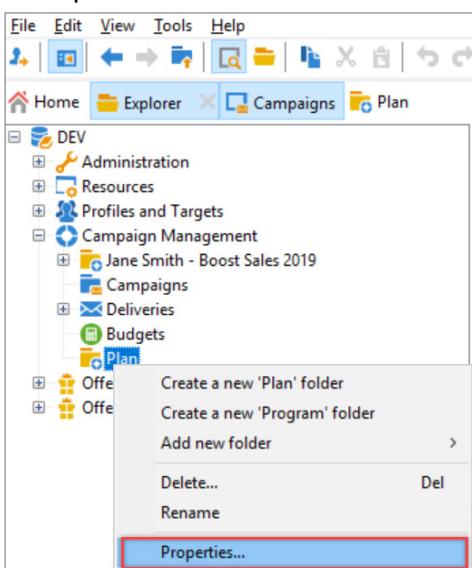
## Task 1: Create a marketing plan

1. Click the **Explorer** tab.
2. In the **Explorer** view, right-click **Campaign management** root folder > **Add new folder** > **Campaign Management** > **Plan**, as shown. The **Plan** folder is created in the **Campaign Management** root folder.

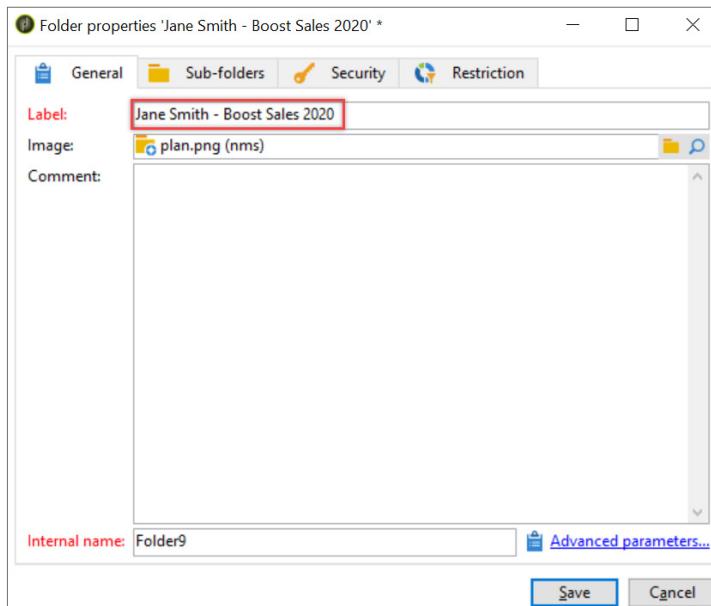


**Note:** You need to have admin rights to create a plan or a program folder by using the Explorer view. You can create a plan using the Dashboard, if you do not have admin rights to access the instance. On the Home page, click the **Campaigns** universe > **Create** > **More** > **Plan**. The **Plan New** dialog box opens. In the Label field, type **Plan**. In the Parent field, click the drop-down arrow and select the root **Campaign Management** folder. Click **Ok** and then click **Save**. You can click the **Explorer** option and navigate to **Campaign Management** folder to view the plan that you created.

3. Right-click the **Plan** folder and select **Properties**, as shown. The **Folder properties 'Plan'** dialog box opens.



4. In the **Label** field, type <your name> – Boost Sales 2020. For example, enter **Jane Smith - Boost Sales 2020**, as shown:

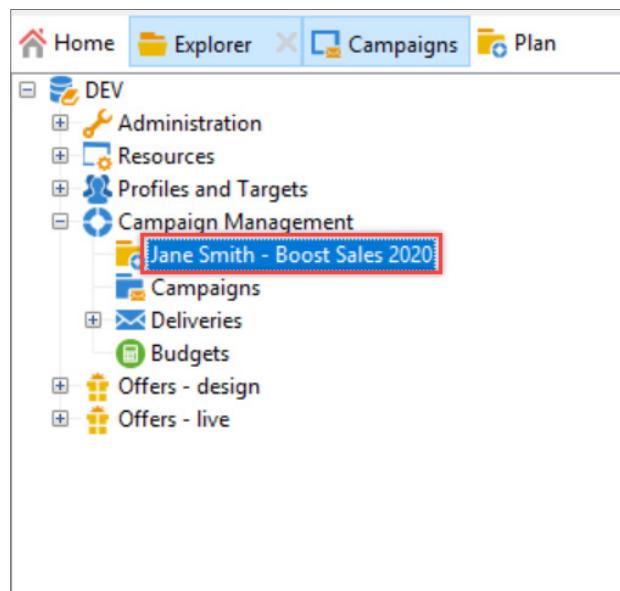


5. Click **Save**.



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

6. On the tree view, navigate to the **Campaign management** root folder and select the plan you created in the previous step. For example, select **Jane Smith - Boost Sales 2020**, as shown:



The plan opens as a separate tab.

- Click the **Plan** tab to open the plan folder, as shown:

The screenshot shows the Adobe Campaign interface with the 'Plan' tab selected. On the left, there's a tree view under 'DEV' with nodes like Administration, Resources, Profiles and Targets, and Campaign Management. Under Campaign Management, 'Jane Smith - Boost Sales 2020' is selected. The main area displays a calendar grid for the period from June 2019 to March 2023. The grid is mostly empty, with some light orange shading. At the top of the main area, there are tabs for 'Schedule', 'Edit', and 'Documents'. Below the tabs, there's a search bar and a 'Filter' button. To the right of the calendar, there are buttons for 'Schedule' and 'Reports', and a green 'Add a program' button. A blue link 'Increase the displayed height' is at the bottom right of the calendar area.

- Click the **Edit** tab on the list view.
- Ensure that the **Start** date and **End** date correspond to the current calendar year. If not, change the dates to correspond to the current calendar year.
- Click **Save** in the upper right of the list view to save the marketing plan.



**Note:** The **Save** option will appear only if you have made any changes to the dates.

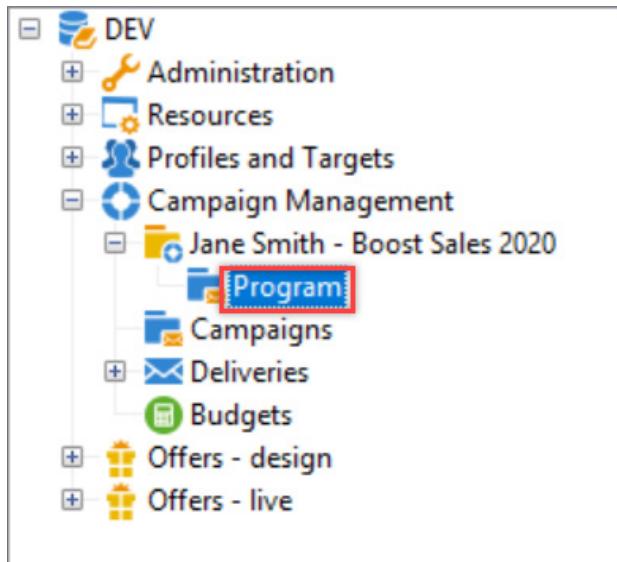
## Task 2: Create a marketing program to support the marketing plan

- In the Explorer tree view, right-click the plan you created in Task 1 and select **Create a new 'Program' folder**, as shown:

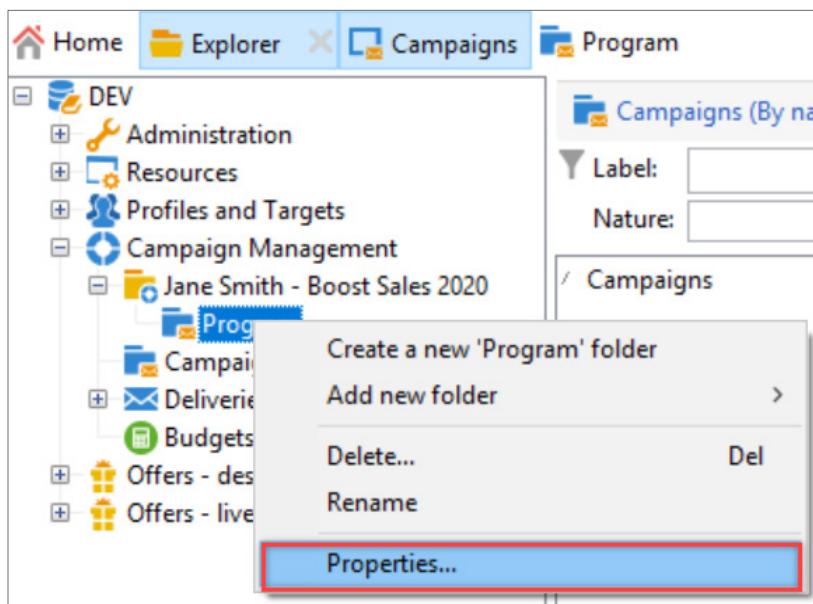
The screenshot shows the Adobe Campaign interface with the 'Plan' tab selected. The tree view on the left shows the same structure as before. Right-clicking on the 'Jane Smith - Boost Sales 2020' node in the 'Campaign Management' section opens a context menu. The menu items are: 'Create a new 'Plan' folder', 'Create a new 'Program' folder' (which is highlighted with a red box), 'Add new folder', 'Delete...', 'Rename', and 'Properties...'. Below the menu, there are two cost-related fields: 'Estimated provisional cost: 0.00' and 'Calculated cost: 0.00'.

A new **Program** folder is created.

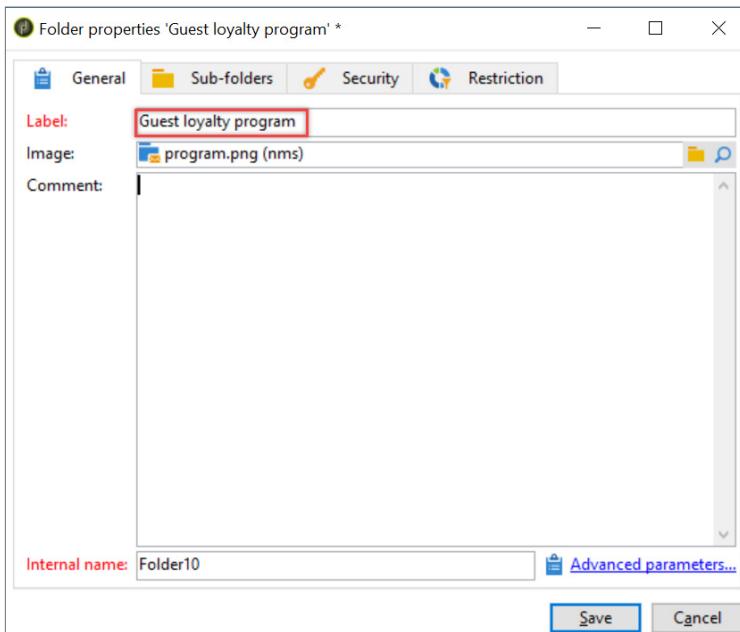
2. Verify the **Program** folder is created under the plan folder that you created in Task 1, as shown:



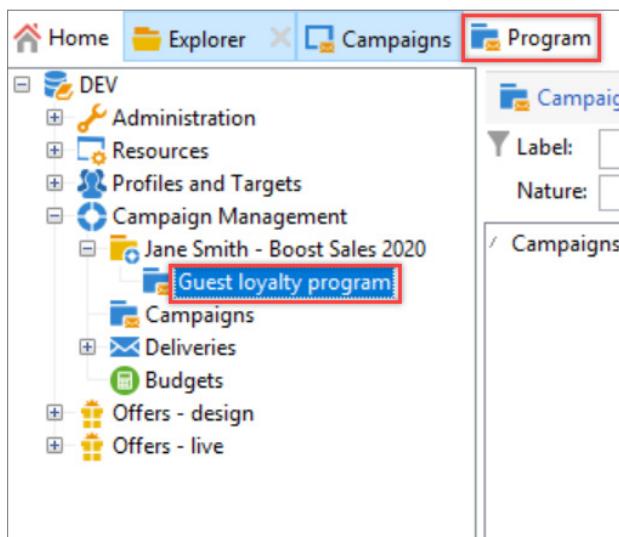
3. Right-click the **Program** folder and click **Properties**, as shown. The **Folder properties 'Program'** dialog box opens.



4. In the **Label** field, type **Guest loyalty program**, as shown:



5. Click **Save**. The program name is updated in the tree view.  
6. In the tree view, select the program you created in the previous step. A new **Program** tab is added to the tabs, as shown:



- Click the **Program** tab. The **Program** view opens in the list view, as shown:

- Click the **Edit** tab. The page to edit the program is displayed.
- Ensure that the **Start** date and **End** date correspond to the current calendar year. If not, change the dates to correspond to the current calendar year.
- Click **Save** in the upper right of the list view to save the changes in the marketing program.



**Note:** The **Save** option will appear only if you have made any changes to the dates.

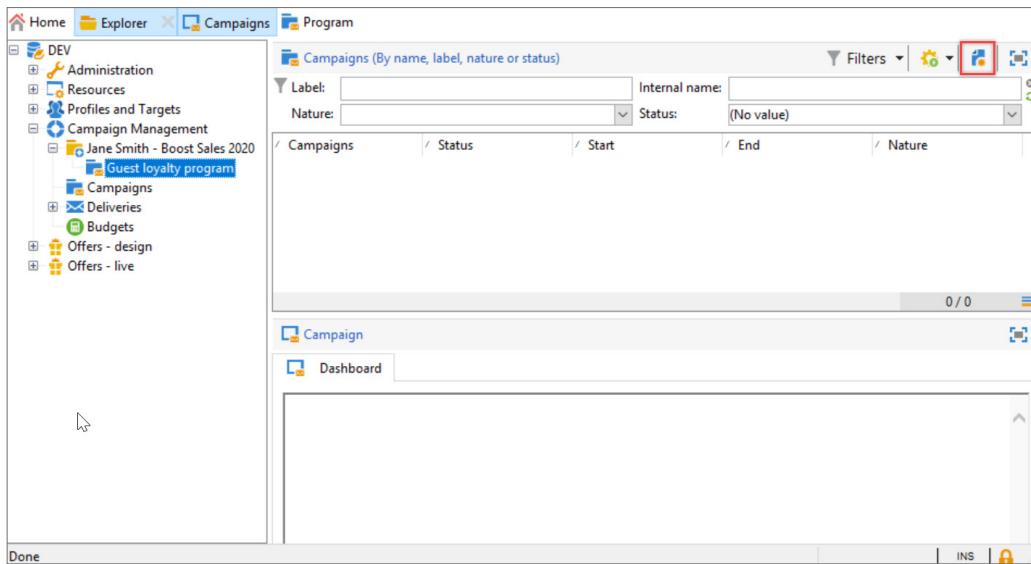
### Task 3: Create a campaign

- In the Explorer view, click **Campaign Management** and select **Guest loyalty program** (under <your initials - Boost Sales 2020 campaign), as shown. The list view is displayed.

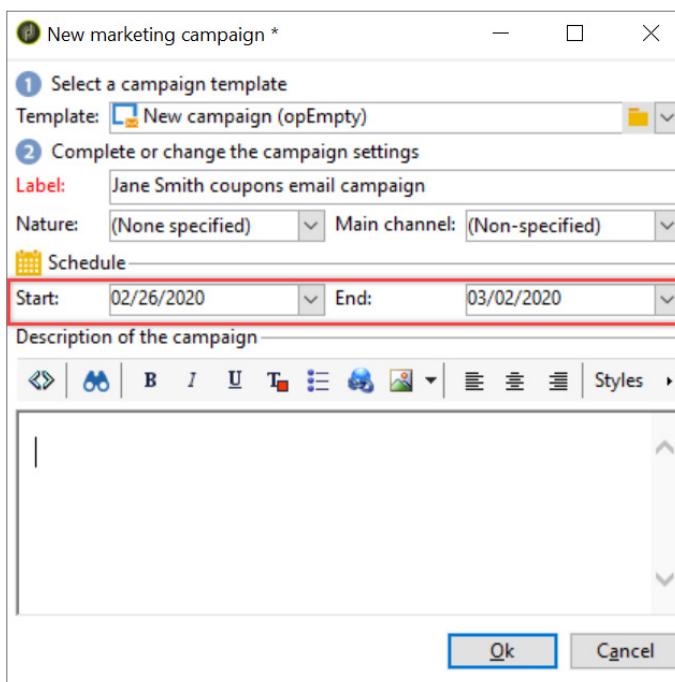


**Note:** Ensure that you are on the **Campaigns** tab to view the list view.

2. Click the **New** icon in the upper-right corner of the list view, as shown. The **New marketing campaign** dialog box is displayed.



3. In the **New marketing campaign** dialog box:
- 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, type <Your name> coupons email campaign. For example: **Jane Smith coupons email campaign**.
  - In the **Main channel** field, click the drop-down arrow and select **Email**.
  - Keep the default start date and end date, as shown:



- Click **Ok**. The newly created campaign is added to the list view, as shown:

The screenshot shows the Adobe Campaign Classic - Client console interface. The left sidebar navigation includes Home, Explorer, Campaigns, and Program. Under Program, there's a section for 'Campaign Management' which contains 'Jane Smith - Boost Sales 2020' and 'Guest loyalty program'. The main area displays a table titled 'Campaigns (By name, label, nature or status)'. One row in the table is highlighted with a red border, showing 'Jane Smith coupons... Started' with a start date of '02/26/2020' and an end date of '03/02/2020'. Below the table, a detailed view of the campaign is shown with tabs for 'General', 'Schedule', and 'Reports'. The 'General' tab shows the campaign was started on '02/26/2020' and is currently 'In progress'.

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

---

**Note:** You can directly create a campaign by accessing the **Explorer** view. In the **Explorer** view, navigate to **Campaign Management > Campaigns** to create a new campaign by clicking the **New** button in the in the upper right of the **Campaigns (By name, label, nature or status)** window.

---

- Confirm the program location path is correct, as shown:

The screenshot shows the campaign workspace for 'Jane Smith coupons email campaign (OP2)'. The top navigation bar includes Home, Explorer, and the current campaign name. Below the navigation are tabs for Dashboard, Edit, and Targeting and workflows. The main content area has tabs for General, Schedule, and Reports. The General tab displays information about the campaign: it was started on '02/26/2020', is currently 'In progress', and is of type 'Unique'. The 'Program' field is highlighted with a red box and shows the full path: 'Campaign Management > Jane Smith - Boost Sales 2020 > Guest loyalty program'. Other details include a schedule from '02/26/2020' to '03/02/2020' and an assignee of 'Administrator (admin)'. At the bottom, there are links for Action(s) on the campaign, Add a delivery, and Add a document.

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**Note:** You can directly create a campaign by accessing the **Explorer** view. In the **Explorer** view, navigate to **Campaign Management > Campaigns** to create a new campaign.

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## Module 2

# Manage Recipient Data in Adobe Campaign Classic

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## Introduction

In digital marketing, you may need to send out campaigns and other communications to a huge customer base. In addition, you need to ensure that your campaign is reaching the right audience in a personalized manner. To do this, you need to manage, update, and maintain recipient data frequently. Adobe Campaign Classic enables you to create and manage recipient data. You can access the customer recipient data and segment the data to target and connect with your customer by using email, SMS, or any other channel.

## Objectives

After completing this module, you will be able to:

- Explain how to access the recipient data
- Explain how to sort and filter the recipient data
- Explain the General Data Protection Regulation (GDPR) compliance of Campaign Classic
- Register a recipient profile by using a web application
- Browse the recipient/profiles data
- Create a profile
- Update an existing profile
- Explain how to segment recipients by using a query
- Create and run simple queries
- Create and run advanced queries
- Create simple queries that use functions
- Combine the results of multiple queries
- Apply standard exclusions

# Accessing Recipient Data

---

Recipients are the contacts stored in the Campaign Classic database and include subscribers, customers, and prospect list members. They are the audiences available to segment, target, and connect through email, SMS, or any other channel.

You can access the recipient data by using the:

- Explorer view
- Profiles and targets universe on the Home page

By default, the contacts are stored in the **Recipient** folder (Profiles and Targets universe/Explorer view).

In Explorer view, when you select a record, you will see the recipient's first name, last name, status, birth date, and contact information. You can also view the following information:

- Contact information for the customer
- Lists to which the customer is part of
- Services to which the customer is subscribed
- Deliveries received
- Tracking data for any click or open actions performed on a delivery
- Propositions or offers recipients received
- Orders or purchases

On the **Profiles and targets** universe, you can access recipients, lists, subscription services, and existing targeting workflows.

## Sorting and Filtering the Recipient Data

Campaign Classic enables you to sort the list of recipients in the Campaign database. You can click any column header to sort the column. If you click once, it will sort the information in ascending order. If you click twice, it will sort the information in descending order. If you click three times, information returns to the default sorting order. The Configure list function enables you to add or remove columns in the Recipients folder. You can access the function by right-clicking the recipient list and then selecting the Configure list option or by clicking the Configure list icon.

## Filters in Campaign Classic

Campaign Classic enables you to apply filters to the data using several filters. You can use these filters once or save them for future use.

The following table provides you with information about the filters in Campaign Classic:

Filter	Description
Default filters	Default filters are associated with a data type. For example, by default, a filter on the last name and email is displayed on the recipient list.
Simple filters	Simple filters are defined with one or more simple search criteria on the displayed columns. You can combine several simple filters on the same query to refine your search. The filter fields are displayed one beneath the other. They can be deleted independently of each other.
Advanced filters	Advanced filters are created using a query or a combination of queries on the data. You can use functions to define the content of the filter.
User filters/Application filters	User filters/Application filters are an advanced filter that is saved for future use. You can share the Advanced filters with other operators.

# GDPR Compliance of Campaign Classic

---

The General Data Protection Regulation (GDPR):

- Is the European Union's (EU) new privacy law that defines data protection requirements
- Are new rules that affect any company that markets products and services to individuals in the EU.
- Is a shared responsibility between brands and technology providers.

Adobe provides certified security and privacy controls by default. In addition to the privacy capabilities already available in Adobe Campaign, Adobe has included additional capabilities to help facilitate data protection.

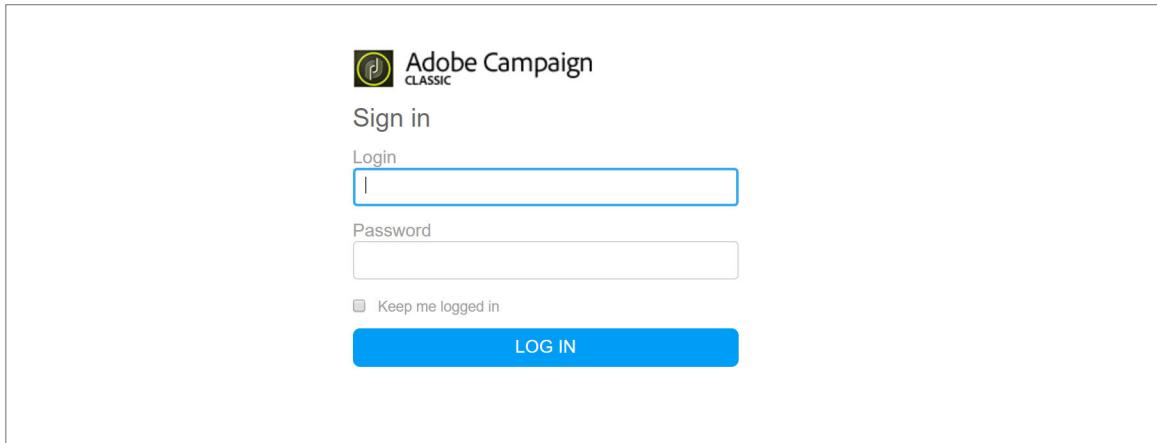
The following capabilities are offered by Campaign Classic for GDPR:

- **Right to access:** Enables the data subject to receive a copy of their personal data captured by data controllers, potentially including data stored in Adobe Campaign.
- **Right to delete:** Enables the data subject to have their personal data captured by data controllers erased, potentially including data stored in Campaign Classic.
- **Consent management:** Enables the data subject to agree (or not) to the processing of their personal data.
- **Data retention:** Enables you to limit the data storage by setting a specific retention period.
- **User roles:** Enables you to manage and restrict user access to different types of data.

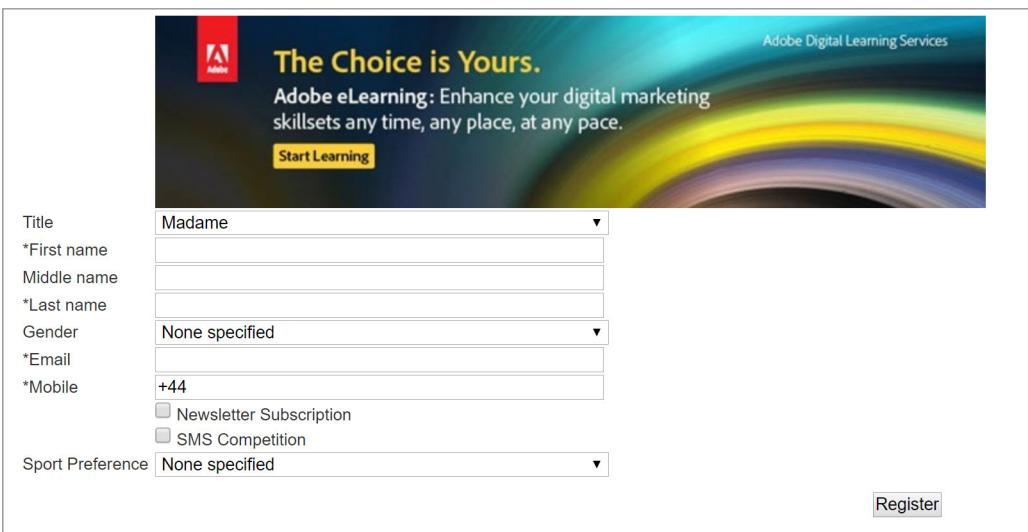
# Exercise 1: Register a recipient profile by using a web application

In this exercise, you will register a profile by using a web application.

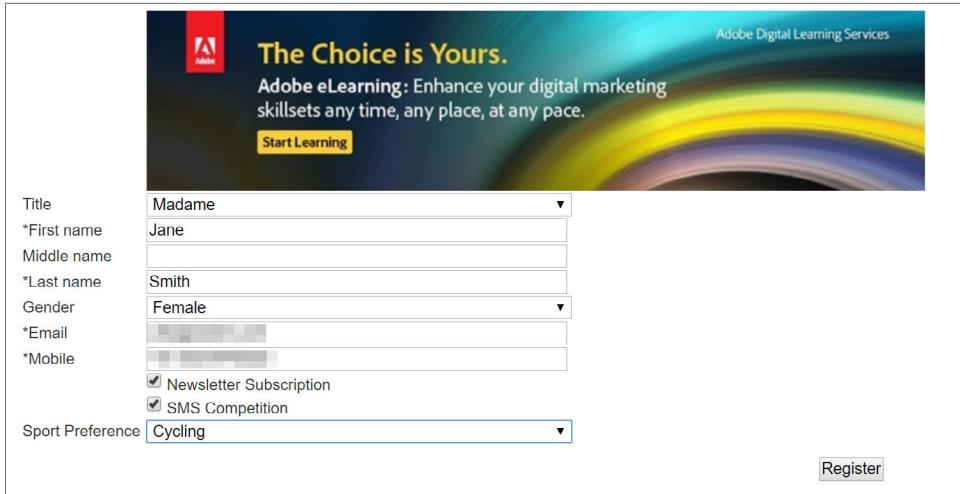
1. Enter the URL provided by your instructor in any browser in your system. For example, type <https://campaignXXX.region.adobeblab.com/webApp/trainingSignUpPage>. Here, **XXX** refers to the instance number and the region refers to the region for which the instance is assigned. The login page is displayed, as shown:



2. Provide the credentials given by your instructor on the login screen and click **LOG IN**. The registration page is displayed, as shown:



Type your details in the appropriate fields. To subscribe to the Newsletter subscription and SMS competition, you need to select the **Newsletter subscription** checkbox and the **SMS Competition** checkbox. Also, provide your favorite sport in the **Sport Preference** field by clicking the drop-down arrow and selecting your favorite sport, as shown:



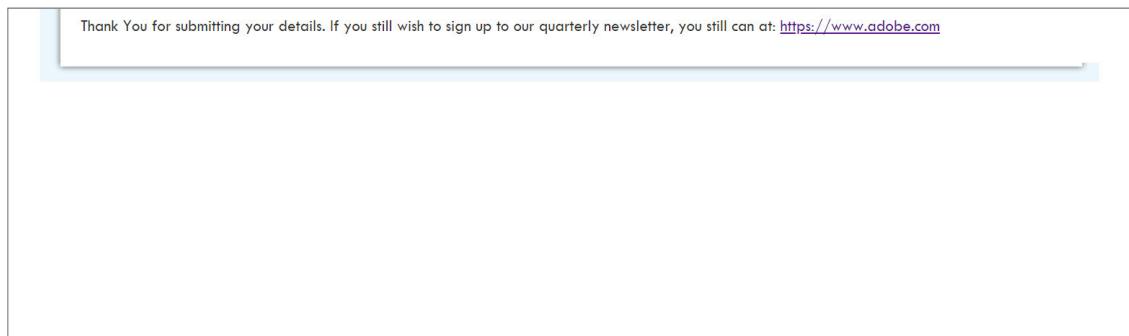
The Choice is Yours.  
Adobe eLearning: Enhance your digital marketing skillsets any time, any place, at any pace.  
Start Learning

Title: Madame  
\*First name: Jane  
Middle name:  
\*Last name: Smith  
Gender: Female  
\*Email: [redacted]  
\*Mobile: [redacted]  
 Newsletter Subscription  
 SMS Competition  
Sport Preference: Cycling  
Register

3. Click **Register**. A landing page thanking you for your registration is displayed, as shown. If you have subscribed to the newsletter, you will receive an email notification to the email address you provided during the registration.



If you have not subscribed to the newsletter, the following page is displayed:



## Exercise 2: Browse the recipient/profile data

In this exercise, you will browse the recipient data, configure the columns, and sort the recipient data.

1. In the Campaign Client console, on the **Home** page, click **Explorer**.
2. Navigate to **Profiles and Targets > Recipients**, as shown. The recipients' data is displayed in the list view.

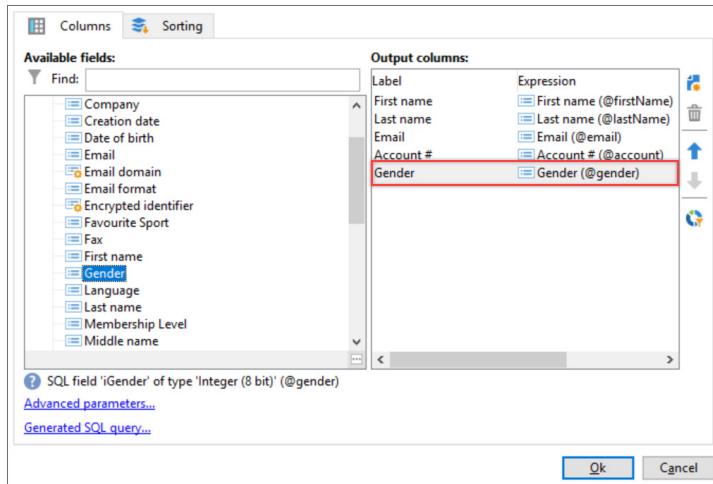
First name	Last name	Email	Account
Mark	Aaron	mark.aaron@ccccomca...	
George	Aaron	craig.aaronson@yyyy...	
Craig	Aaronson	damien.abachin@ffffree...	
Damien	Abachin	patrick.abadie@ffffree...	25738165314
Patrick	Abadie	eric.abadie@hhhhotm...	
Eric	Abadie	michael.abbott@zzzur...	302024272
Michael	Abbott	mark.abbott@lllveeee...	
Mark	Abbott	labbott@yyyyahooooo...	
Lauren	Abbott		

3. Click the **Configure list** icon in the bottom-right corner of the list view. Alternately, you can right-click the list view and select **Configure list**, as shown.

- Configure list...
- Export...
- Select all
- Load all
- No filter
- Pre-configured filters >
- And >
- Advanced filter...
- New
- Duplicate
- Duplicate to...
- Save Ctrl+S
- Cancel
- Delete Del
- Actions >
- Open

The **List configuration 'Recipients (nms)** dialog box opens.

- Type **Gender** in the **Find** field and press the **Enter** key to search for the field. Notice that **Gender** is displayed in bold format in the **Available fields** section.
- Double-click **Gender** to move it to the **Output columns** section, as shown:



- Click **Ok**. The **Gender** column is added to the list view, as shown:

The screenshot shows the 'Recipients (By name or email)' list view. The left sidebar shows navigation paths like 'DEV', 'Administration', 'Resources', 'Profiles and Targets', 'Campaign Management', 'Offers - design', and 'Offers - live'. The main area displays a table with columns: First name, Last name, Email, Account, and Gender. The 'Gender' column is highlighted with a red box. The table contains several rows of data. Below the table, a detailed view of a recipient is shown with tabs for 'General', 'Contact information', and 'Other'. The 'General' tab shows 'First name: Aaron', 'Last name: Rixon', 'Title: Mr.', 'Middle name: ', 'Account #: ', 'Status: Prospect', 'Company: ', 'Gender: Male', 'Language: English', 'Date of birth: 11/13/1976', and 'Favourite Sport: '. The 'Contact information' tab shows 'No longer contact (by any channel)' checked. The 'Other' tab shows 'Membership Level: Not a Member'.

7. You can click the column header to sort the column. For example, click the **Last name** column header. The names are sorted in ascending order, as shown:

The screenshot shows the 'Recipients (By name or email)' list view. The 'Last name' column is highlighted with a red box. The data table contains the following rows:

First name	Last name	Email	Account	Gender
Mark	Aaron	mark.aaron@cccomca...		Male
George	Aaron	craig.aaronson@yyya...		Male
Craig	Aaronson			Male
Damien	Abachin	damien.abachin@ffffree...		Male
Patrick	Abadie	patrick.cabadie@ffffreee...	25738165314	Male
Eric	Abadie	eric.abadie@hhhhotm...		Male
Michael	Abbott	michael.abbott@zzzur...	302024272	Male
Mark	Abbott	mark.abbott@lllveeee...		Male
Lauren	Abbott	labbott@yyyyahooooo...		Female

Below the list is a detailed view of a recipient named 'Recipient 'Aaron Mark (mark.aaron@cccomcastttt.net)'. The 'General' tab is selected, showing fields like First name, Last name, Title, Account #, Status, Company, Gender, Language, Date of birth, and other contact information.

To delete a column:

8. Click the **Configure list** icon.
9. In the **Output columns** section, select the column that you want to delete. For this exercise, select **Gender**, as shown:

The screenshot shows the 'Configure list' dialog box. In the 'Output columns' section, the 'Gender' column is selected and highlighted with a red box. The 'Label' column shows 'Gender' and the 'Expression' column shows 'Gender (@gender)'. Other columns listed include First name, Last name, Email, and Account #.

**Available fields:**

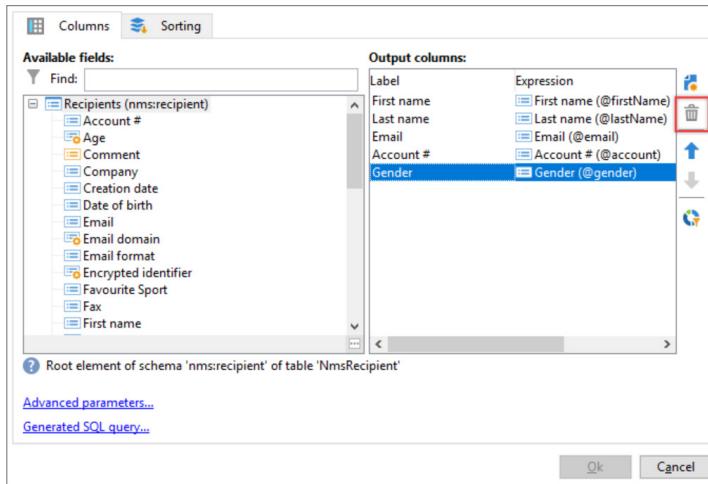
- Recipients (nms:recipient)
  - Account #
  - Age
  - Comment
  - Company
  - Creation date
  - Date of birth
  - Email
  - Email domain
  - Email format
  - Encrypted identifier
  - Favourite Sport
  - Fax
  - First name

**Output columns:**

Label	Expression
First name	First name (@firstName)
Last name	Last name (@lastName)
Email	Email (@email)
Account #	Account # (@account)
Gender	Gender (@gender)

At the bottom of the dialog are 'Ok' and 'Cancel' buttons.

10. Click the **Delete** icon (trash can), as shown, to delete the column.



11. Click **Ok**. The column is deleted from the list view, as shown:

The screenshot shows the 'Recipients (By name or email)' list view. A red box highlights the row for Aaron Rixon. Below the list, a detailed view of Aaron Rixon's profile is displayed, showing various contact information fields.

## Exercise 3: Create a profile

In this exercise, you will add your profile data into the Campaign Classic server.

1. In the **Explorer** tree view, expand **Profiles and Targets > Recipients > Training**. The data in the **Training** folder is displayed in the list view, as shown:

The screenshot shows the Adobe Campaign Classic Client console interface. The left sidebar displays the navigation tree with the 'Training' folder under 'Recipients' highlighted with a red box. The main area shows a list view titled 'Training (By name or email)' with columns for First name, Last name, Email, and Account. A single row for 'Pavan' is selected. Below the list is a detailed view of 'Recipient P Pavan (pavan@adobe.com)'. The 'General' tab is active, showing fields like First name: Pavan, Last name: P, Title: Manager, Account #: 123456789, Status: Prospect, Company: ABC Corp, Gender: None specified, Language: English, and Date of birth: 1990-01-01. Other tabs include Contact information, Other, Lists, and Main parameters. The bottom right corner of the detailed view has a red box around the 'INS' button.

2. Click the **New** icon above the list view to add a new recipient's data, as shown. The details view is updated to add the data of new recipient.

This screenshot is identical to the previous one, showing the 'Training' list view. However, a red box highlights the 'New' icon (a blue plus sign) located in the top right corner of the list view header. The detailed view of 'Recipient P Pavan' remains the same as in the previous screenshot.

3. In the details view, on the **General** tab, enter your details, such as first name, last name, email ID, mobile number, gender, and birth date, as shown:

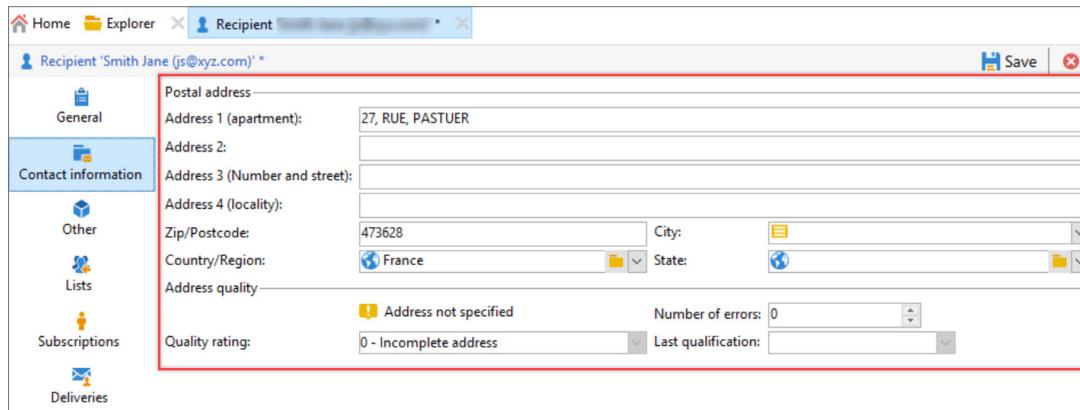
4. Click **Save**. The recipient data is saved and you will see a new entry in the list view, as shown:

You can click the green Refresh list icon in the upper right to refresh the recipient lists and view the recipient's data.

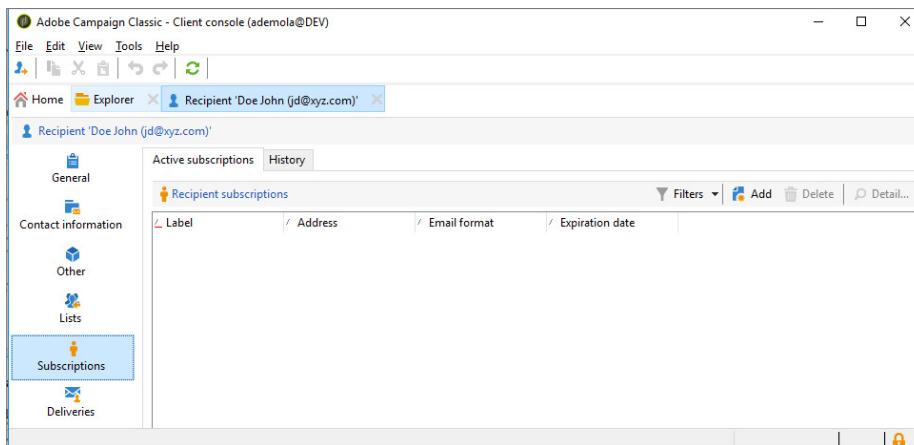
## Exercise 4: Update an existing profile

In this exercise, you will take a previously created profile and update the information, such as contact address, phone numbers, email address, membership level, and favorite sport. You will also subscribe the profile to the Newsletter service and the Monthly SMS competition service.

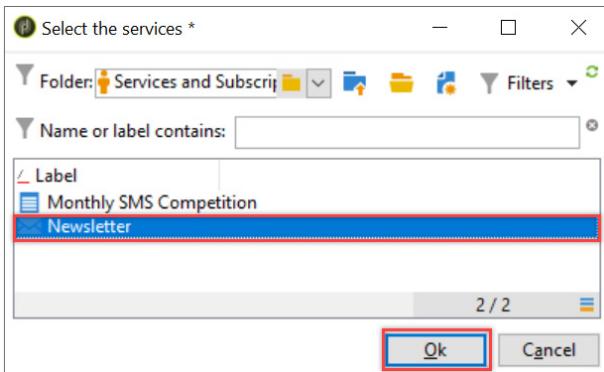
1. In the **Explorer** tree view, navigate to **Profiles and targets > Recipients > Training**.
2. In the list view, select the profile that you created in Exercise 3.
3. Click the **Contact information** tab.
4. Provide your details, such as address, postal code, and country, as shown:



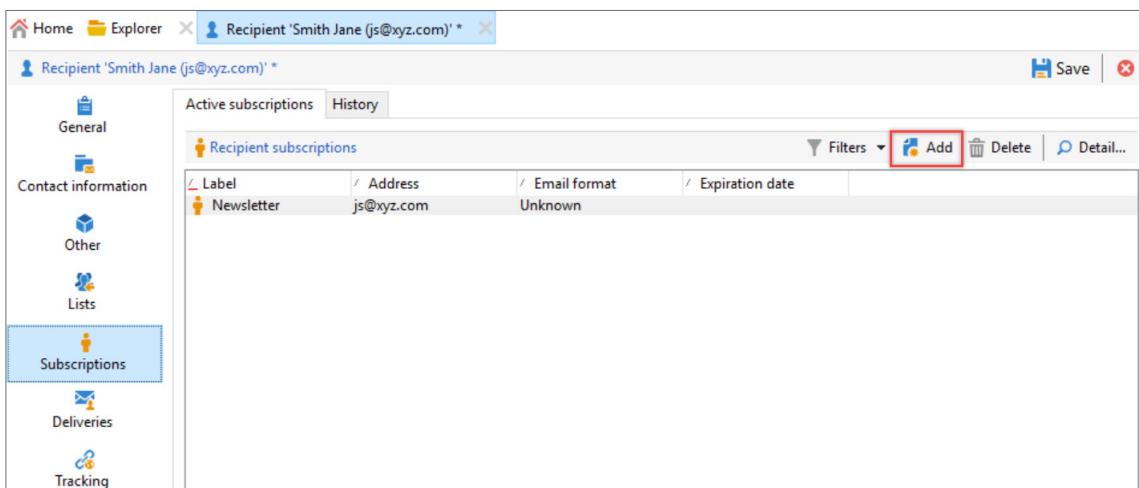
5. Click the **Subscriptions** tab. The **Recipient subscriptions** section is displayed, as shown:



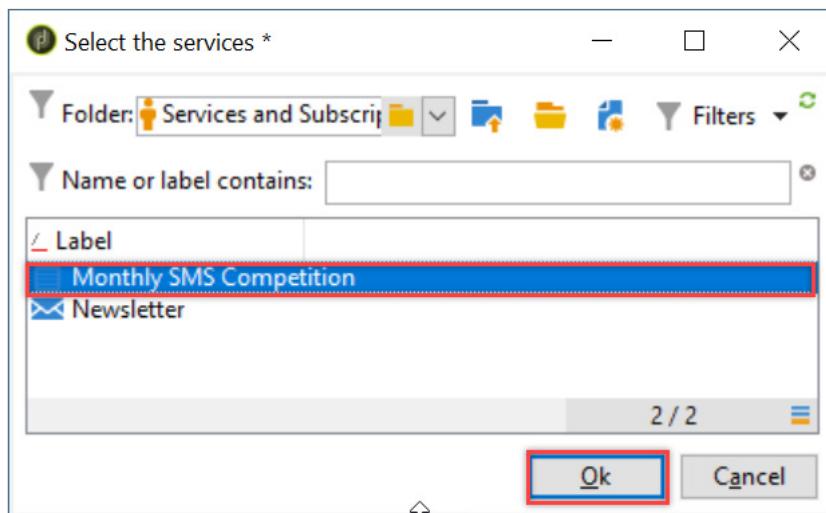
6. Click **Add**. The **Select the services** dialog box opens.
7. Select **Newsletter**, and then click **Ok**, as shown. The **Newsletter** subscription is added to the list of subscriptions:



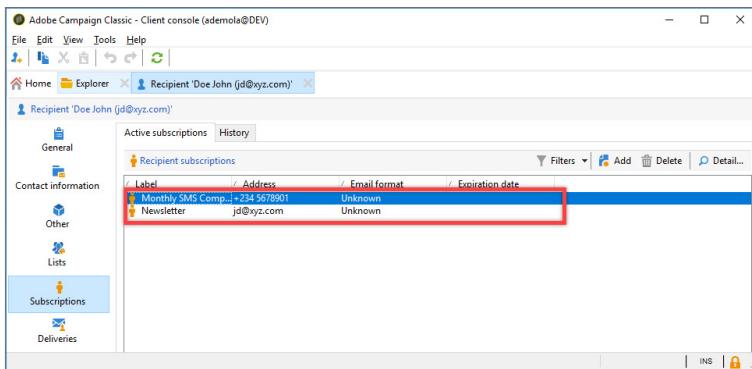
8. Click **Add** in the details view, as shown. The **Select the services** dialog box opens.



9. Select **Monthly SMS Competition** and then click **Ok**, as shown:



The profile details are updated, as shown:



The screenshot shows the 'Recipient subscriptions' list in the Adobe Campaign Classic Client console. The left sidebar has a 'Subscriptions' icon highlighted. The main area shows a table with two rows. The first row is highlighted with a red box and contains the label 'Monthly SMS Comp.', address '+234 5678901', email format 'Unknown', and expiration date 'Unknown'. The second row contains the label 'Newsletter', address 'jd@xyz.com', email format 'Unknown', and expiration date 'Unknown'. The table has columns for Label, Address, Email format, and Expiration date.

Label	Address	Email format	Expiration date
Monthly SMS Comp.	+234 5678901	Unknown	Unknown
Newsletter	jd@xyz.com	Unknown	Unknown

10. Click **Save**. The profile details are saved.

The **Save** option may not appear if you have already saved the profile information.

# Segmenting Recipients by Using a Query Activity

---

Adobe Campaign uses workflows to:

- Carry out targeting campaigns
- Automate tasks
- Perform Campaign Classic technical processes, such as cleanup, collecting tracking information, and provisional calculations.

Deliveries, targeting, and the associated processes are defined via one or more dedicated workflows within campaigns.

Campaign Classic enables you to segment customer data by using the Query activity in a workflow. When editing the Query activity, you need to select the Targeting dimension and then the Filtering dimension first, and then decide the type of filter you want to use to segment the data.

To elaborate on the types of dimensions:

- The Targeting dimension is the type of record you want to return.
- The Filtering dimension is the table in the data model that contains the attributes against which you want to apply the filter. For example, once the Targeting dimension is selected, Campaign Classic will automatically fill the Filtering dimension selection box with all the tables that you can use to apply filter. There are several built-in filters that work with Recipients. However, you can also create your own filters.

The default Targeting and Filtering dimensions for a campaign workflow is the Recipient table. You can specify the filtering conditions to extract the data. When you specify the filtering conditions, you are creating a logical expression. You can preview the data generated by the Query activity to verify the logic used in the filter.

## Exercise 5: Create and run simple queries

**Scenario:** You are working for the retail enterprise We.Retail. For the upcoming Autumn sale offers campaign, you are asked to target customers who belong to specific segments. In this exercise, you will practice how to browse recipient data, and create and run a targeting workflow.

This exercise includes the following tasks:

1. Create a query to display the list of recipients who are in the 20–40 age group
2. Create a query to display the list of prospects based on email address
3. Create a query to display the list of profiles of men based on age, email, and city

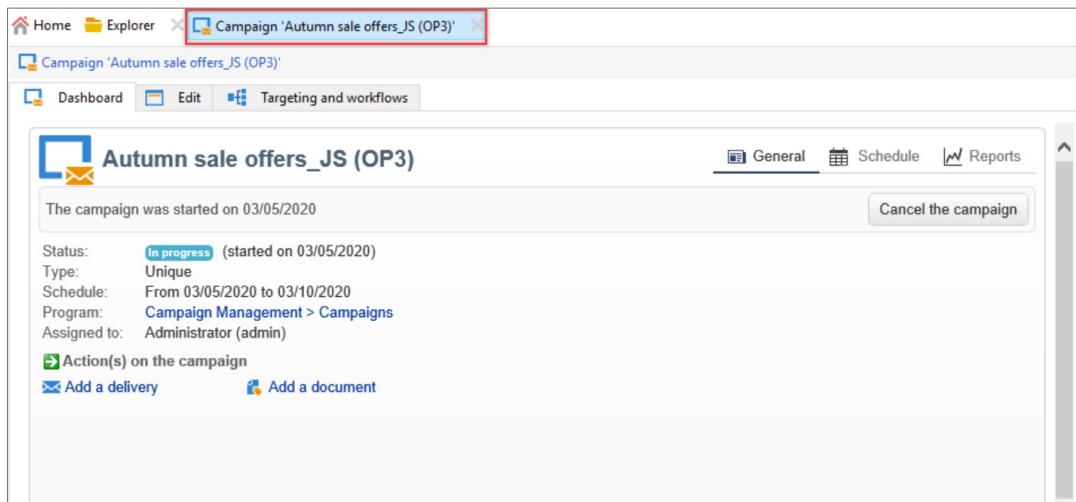
**Task 1:** Create a query to display the list of recipients who are in the 20–40 age group

In this task, you will create a query to display the recipients who are between the 20–40 age group.

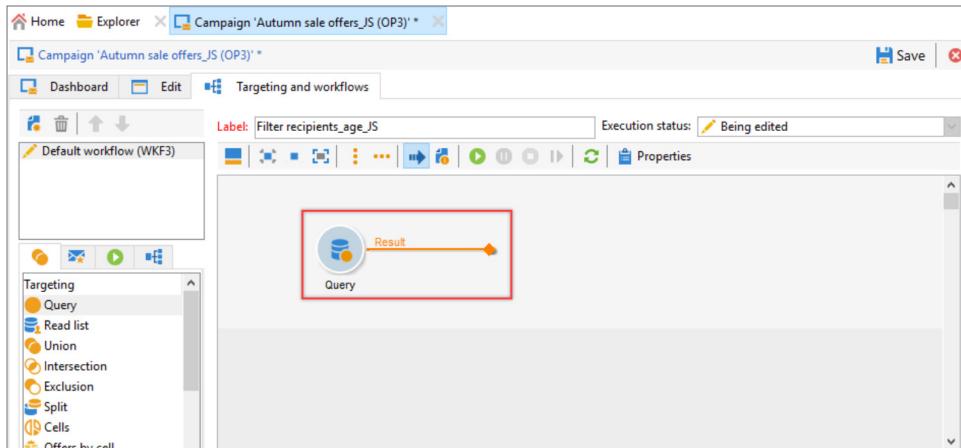
1. In the Explorer view, navigate to **Campaign Management > Campaigns**.
2. In the list view, click the **New** icon. The **New marketing campaign** dialog box opens.
3. In the **Label** field, type **Autumn sale offers\_<your initials>**. For example, enter **Autumn sale offers\_JS**.
4. Keep the default start date and end date.
5. Click **Ok**. The campaign is created, as shown:

The screenshot shows the Adobe Campaign Classic interface. On the left, there is a navigation sidebar with categories like Home, Explorer, Campaigns, and Program. Under Campaigns, there's a section for 'Jane Smith - Boost Sales 2020' which includes 'Guest loyalty program', 'Campaigns', 'Deliveries', 'Budgets', 'Offers - design', and 'Offers - live'. The main area shows a list of campaigns with columns for Label, Status, Start, End, and Nature. A new campaign titled 'Autumn sale offers...' is listed with a status of 'Started', a start date of '03/05/2020', and an end date of '03/10/2020'. The 'Nature' field is '(None specified)'. Below the list, a detailed view of the 'Autumn sale offers\_JS (OP3)' campaign is shown. It displays the message 'The campaign was started on 03/05/2020'. Under 'Status', it says 'In progress (started on 03/05/2020)'. Under 'Type', it says 'Unique'. Under 'Schedule', it says 'From 03/05/2020 to 03/10/2020'. There are tabs for 'Dashboard', 'Edit', and 'Targeting and workflows'.

6. Double-click the campaign in the list view to open the campaign on a separate tab, as shown:

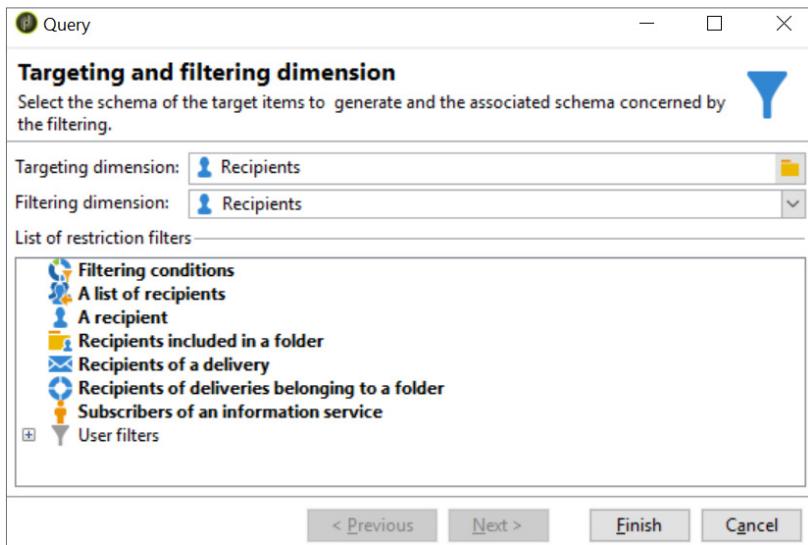


7. Click the **Targeting and workflows** tab to create a workflow.
8. In the **Label** field, type **Filter recipients\_age\_<your initials>**. For example, enter **Filter recipients\_age\_JS**.
9. Click **Save** to save the changes.
10. From the Targeting menu on the left side, drag and drop a **Query** activity onto the workflow, as shown:



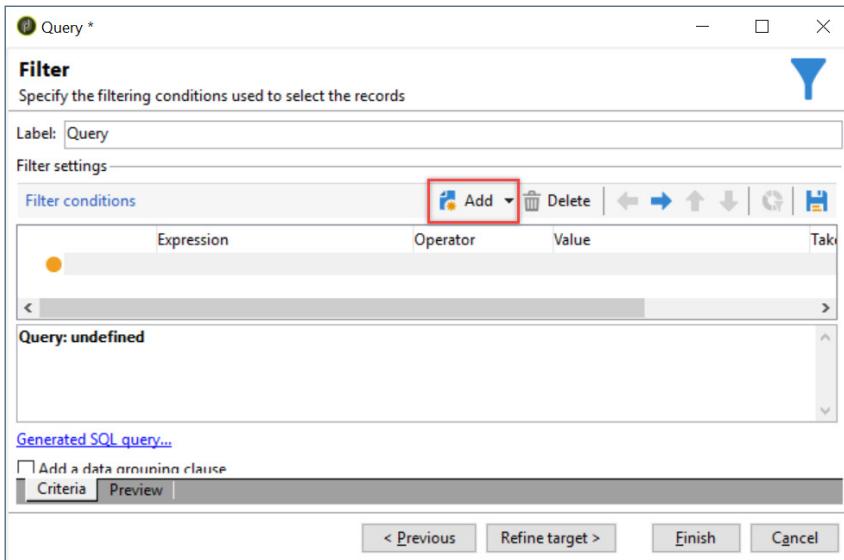
11. Double-click the **Query** activity. The **Query** dialog box opens.

12. Click the **Edit query** link. The **Targeting and filtering dimension** page opens, as shown:

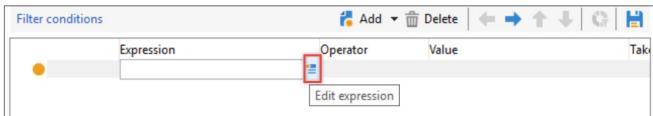


13. Select **Filtering conditions** and click **Next**. The **Filter** page opens.

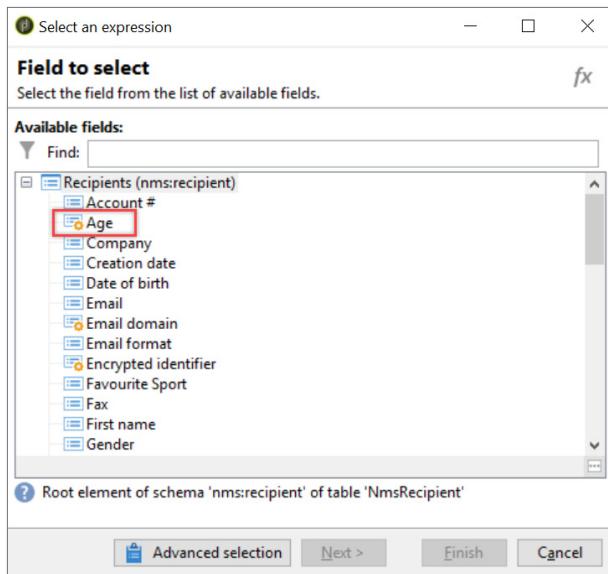
14. Click **Add** to add an expression, as shown. A new field is added to the **Expression** column.



15. Click the **Edit expression** icon, as shown. The **Select an expression** dialog box opens.

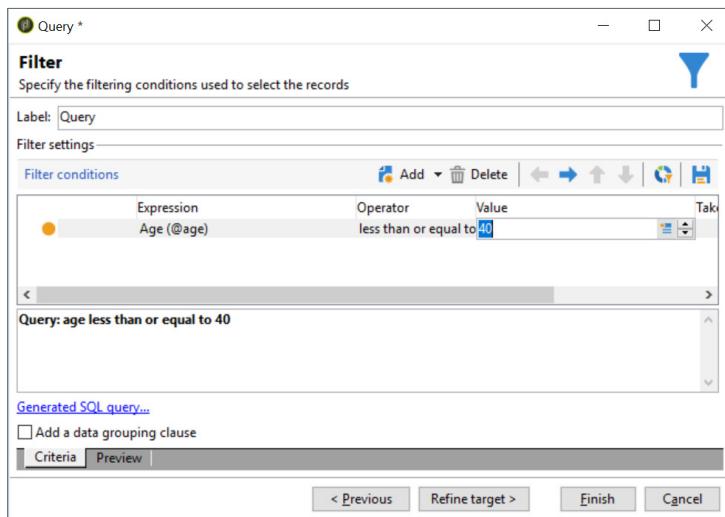


16. Double-click **Age**, as shown. The field is added to the **Expression** column.



17. Click the **Operator** field and select **less than or equal to** from the drop-down list.

18. Click the **Value** field and type **40**, as shown:



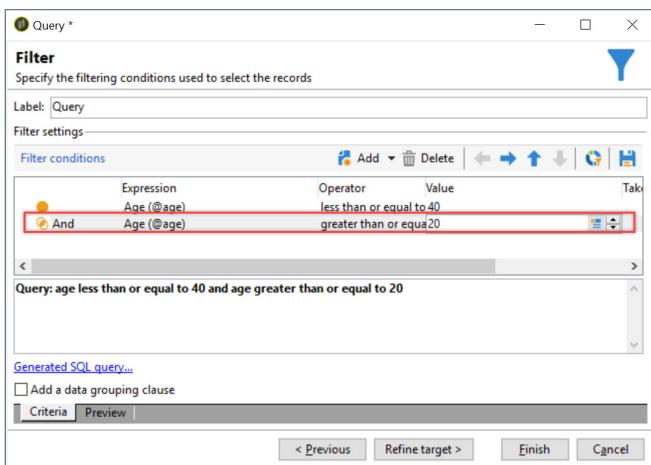
19. Click **Add**. A new field is added to the **Expression** column. By default, the two expressions are combined with the **And** logical operator.

20. Click the **Edit expression** icon. The **Select an expression** dialog box opens.

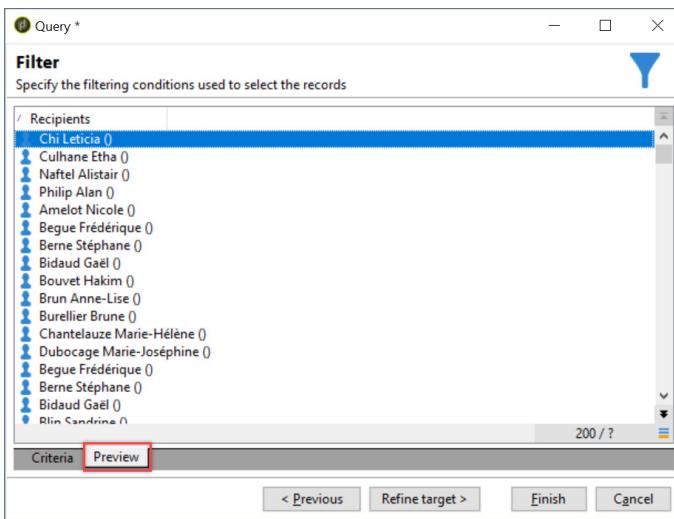
21. Double-click **Age**. The field is added to the **Expression** column.

22. Click the **Operator** field and select **greater than or equal to** from the drop-down list.

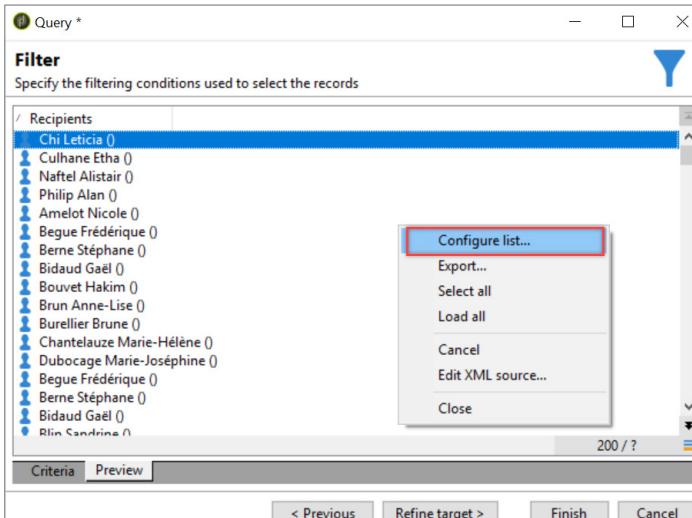
23. Click the **Value** field and type **20**, as shown:



24. Click the **Preview** tab to view the query results, as shown:



25. Right-click in the preview section, and select **Configure list**, as shown. The **List configuration 'Recipients (nms)**' dialog box opens.



26. In **Available fields**, double-click **Age** to add it to **Output columns**.

27. Click **Ok**. The **Age** column is added to the **Filter** page, as shown:

The screenshot shows the 'Filter' dialog box with the title 'Query \*'. The main area is labeled 'Specify the filtering conditions used to select the records'. It contains a table with two columns: 'Recipients' and 'Age'. The 'Age' column is highlighted with a red border. The data in the table is as follows:

Recipients	Age
Chi Leticia ()	39
Culhane Etha ()	39
Naftel Alistair ()	40
Philip Alan ()	37
Amelot Nicole ()	33
Begue Frédérique ()	32
Berne Stéphane ()	31
Bidaud Gaël ()	29
Bouvet Hakim ()	38
Brun Anne-Lise ()	29
Burellier Brune ()	33
Chantelaize Marie-... ()	38
Dubocage Marie-Jos... ()	36
Begue Frédérique ()	32
Berne Stéphane ()	31
Bidaud Gaël ()	29
Rlin Sandrine ()	38

At the bottom of the dialog box, there are buttons for 'Criteria' and 'Preview', and links for '< Previous', 'Refine target >', 'Finish', and 'Cancel'.

28. Click **Finish** to close the **Filter** page.

29. In the **Label** field at the top of the page, type **Age group 20–40**.

30. Click **Ok** in the **Query** dialog box.

31. Click **Save** in the upper right to save the workflow.

32. Click the **Start** icon to start the workflow and verify the number of recipients included in the segment, as shown:



Stay on this page for the next task.

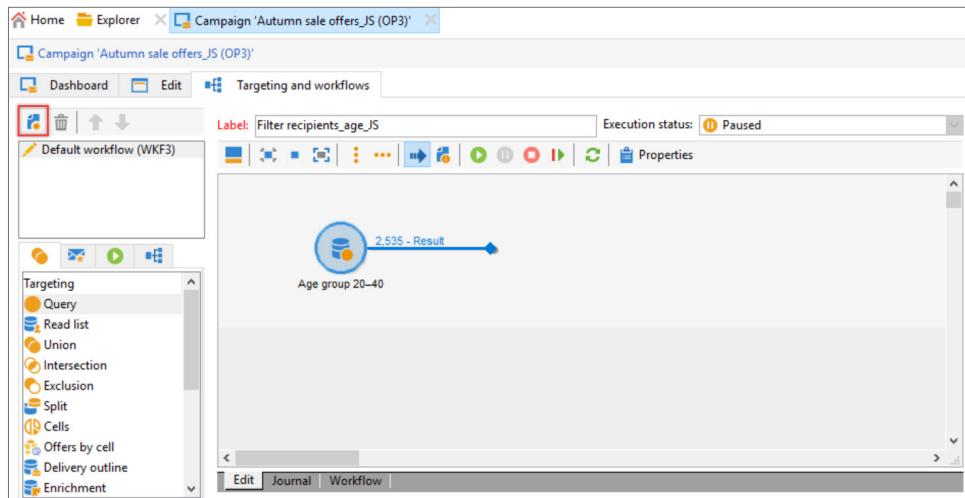


**Note:** The results may vary from the result shown above.

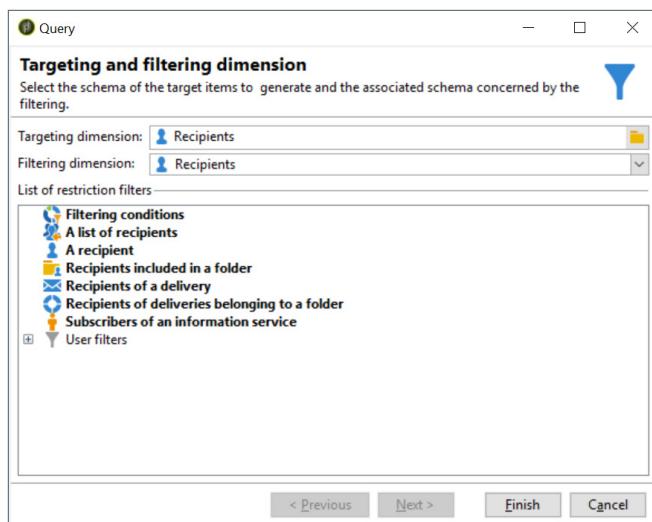
## Task 2: Create a query to display the list of prospects based on email address

In this task, you will create a query to display the recipients who are prospects and have an email domain that starts with an email. In this example, it is hhhhotmail.

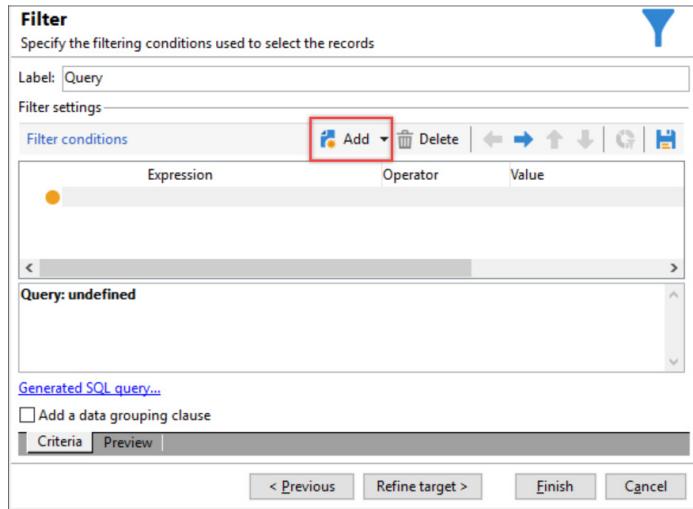
1. On the **Targeting and workflows** tab, click the **Add** icon, as shown. The **New targeting workflow** dialog box opens.



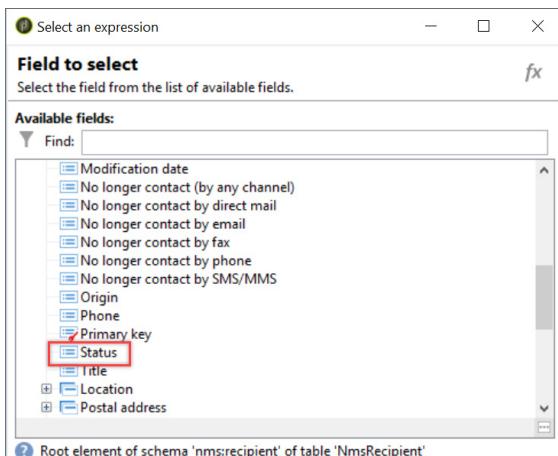
2. Keep the default workflow template.
3. In the **Label** field, type **Filter recipients\_prospects\_<email domain>\_<yourinitials>**. For example, type **Filter recipients\_prospects\_hhhhotmail\_JS**.
4. Click **Ok**. The new workflow is added to the list of workflows.
5. Drag a **Query** activity onto the workflow.
6. Double-click the **Query** activity. The **Query** dialog box opens.
7. Click the **Edit query** link. Another **Query** dialog box opens, as shown:



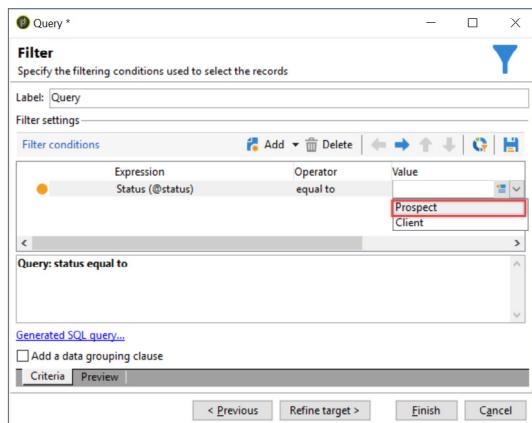
- Select **Filtering conditions** and then click **Next**. The **Filter** page opens.
- Click **Add** to add an expression, as shown. A new field is added to the **Expression** column:



- Click the **Edit expression** icon, as shown. The **Select an expression** dialog box opens.
- Double-click **Status**, as shown. The field is added to the **Expression** column.



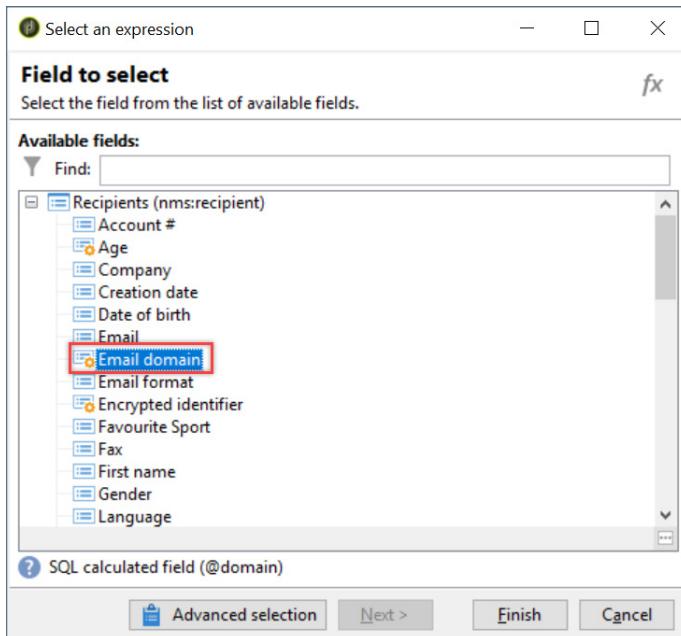
- Click the **Operator** field and select **equal to** (if not already selected) from the drop-down list.
- Click the **Value** field and select **Prospect** from the drop-down list, as shown:



14. Click **Add**. A new field is added to the **Expression** column. By default, the two expressions are combined with the **And** logical operator.

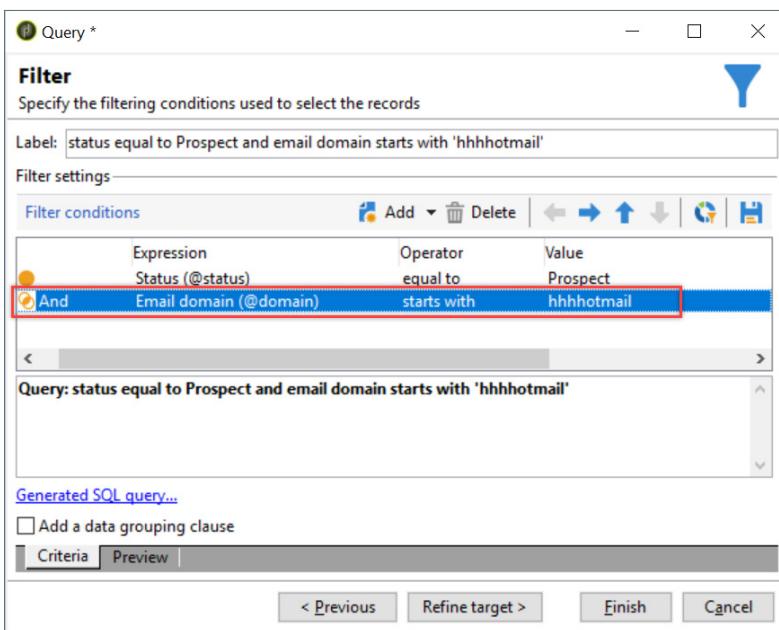
15. Click the **Edit expression** icon. The **Select an expression** dialog box opens.

16. Double-click **Email domain**, as shown. The field is added to the **Expression** column.

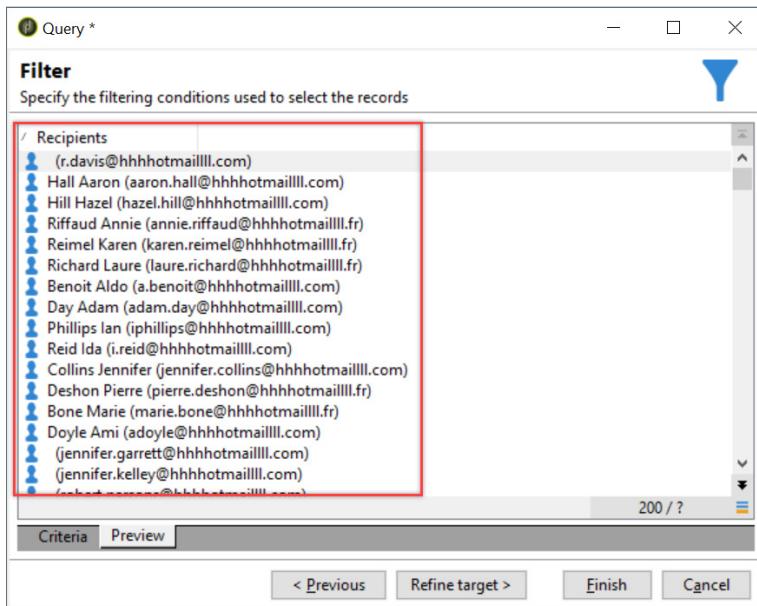


17. Click the **Operator** field and select **starts with** from the drop-down list

18. Click the **Value** field and type **<email domain>**, as shown. In this example it is **hhhhhotmail**:



19. Click the **Preview** tab to view the query results, as shown:



20. Click **Finish** to close the **Filter** page.

21. Click **Ok** in the **Query** dialog box.

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

23. Click the **Start** icon to start the workflow and verify the number of recipients included in the segment, as shown:



Stay on this page for the next task.

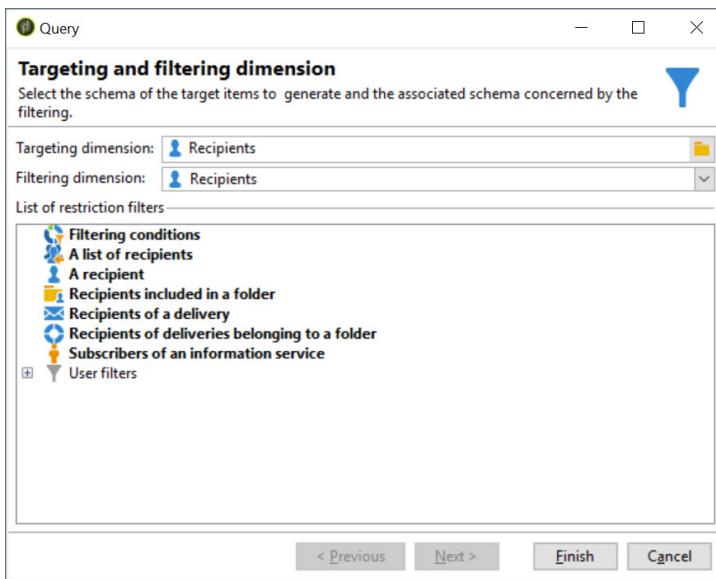


**Note:** The results may vary from the result shown above based on the profiles.

### Task 3: Create a query to display the list of profiles of men based on age, email, and city

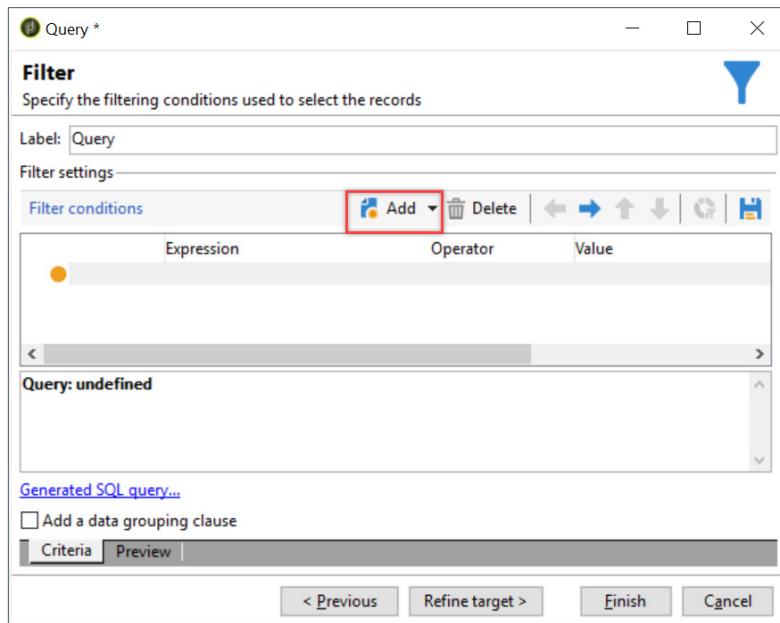
In this exercise, you will create a query to display the list of profiles of men who are above the age of 30, have provided their email IDs, and live in Boston.

1. On the **Targeting and workflows** tab, click the **Add** icon. The **New targeting workflow** dialog box opens.
2. Keep the default workflow template.
3. In the **Label** field, type **Filter recipients\_age\_city\_email\_<your initials>**. For example, type **Filter recipients\_age\_city\_email\_JS**.
4. Click **Ok**. The new workflow is added to the list of workflows.
5. Drag a **Query** activity onto the workflow.
6. Double-click the **Query** activity. The **Query** dialog box opens.
7. Click the **Edit query** link. Another **Query** dialog box opens, as shown:



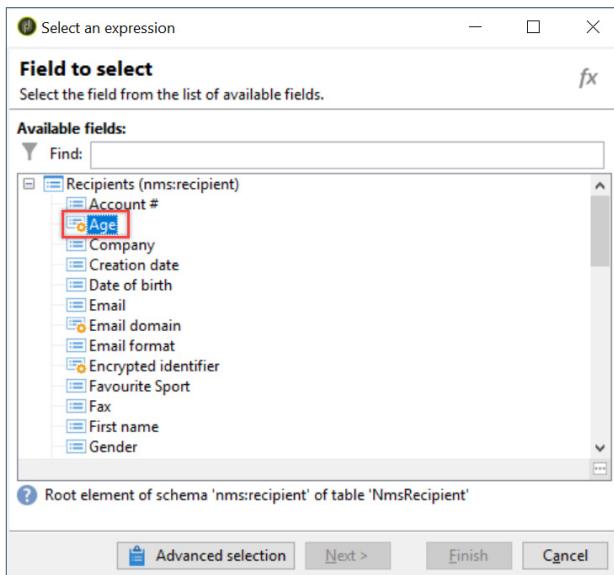
8. Select **Filtering conditions** and then click **Next**. The **Filter** page opens.

9. Click **Add** to add an expression, as shown. A new field is added to the **Expression** column:



10. Click the **Edit expression** icon, as shown. The **Select an expression** dialog box opens.

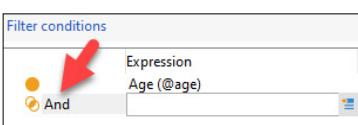
11. Double-click **Age**, as shown. The field is added to the **Expression** column.



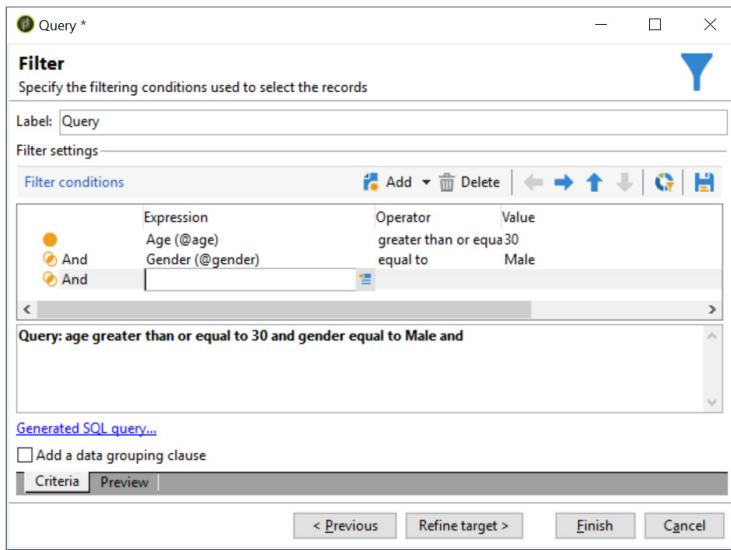
12. Click the **Operator** field and select **greater than or equal to** from the drop-down list.

13. Click the **Value** field and type **30**.

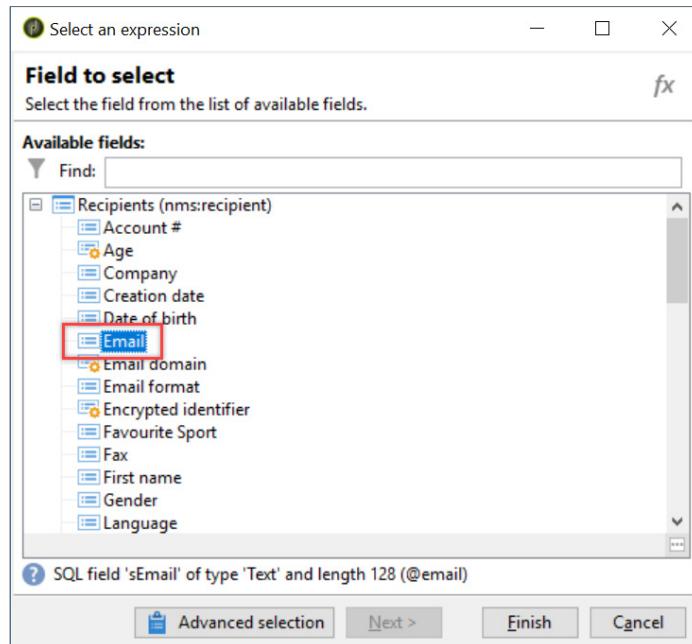
14. Click **Add**. A new field is added to the **Expression** column. By default, the two expressions are combined with the **And** logical operator, as shown:



15. Click the **Edit expression** icon. The **Select an expression** dialog box opens.
16. Double-click **Gender**. The field is added to the **Expression** column.
17. Click the **Operator** field and select **equal to**.
18. Click the **Value** field and select **Male**.
19. Click **Add**. A new field is added to the **Expression** column. By default, the new expression is combined with the **And** logical operator, as shown:



20. Click the **Edit expression** icon. The **Select an expression** dialog box opens.
21. Double-click **Email**, as shown. The field is added to the **Expression** column.

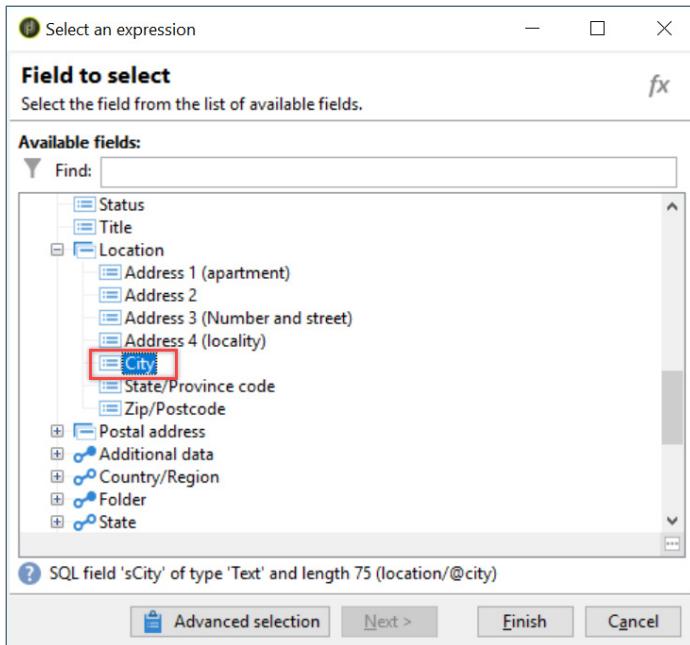


22. Click the **Operator** field and select **is not empty** from the drop-down list.

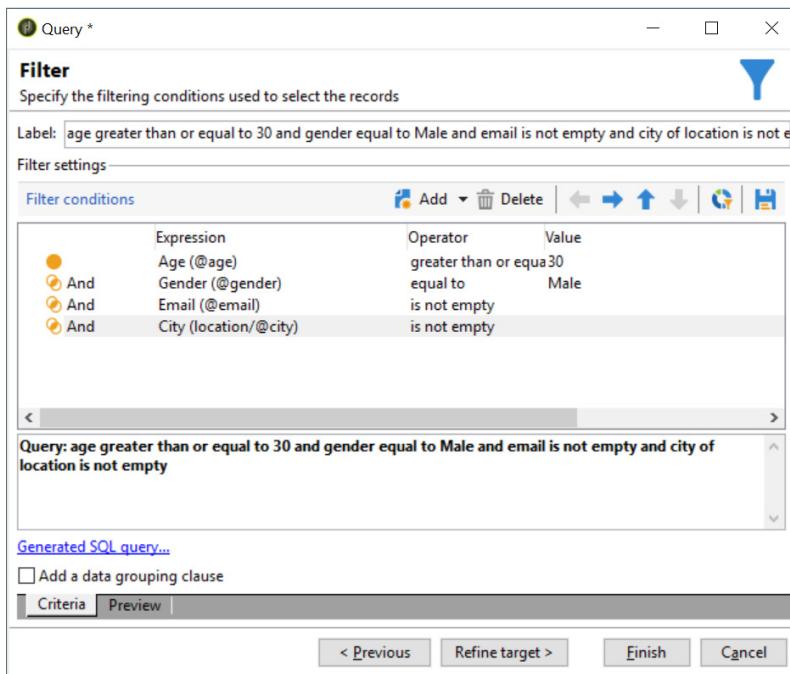
23. Click **Add**. A new field is added to the **Expression** column. By default, the new expression is combined with the **And** logical operator.

24. Click the **Edit expression** icon. The **Select an expression** dialog box opens.

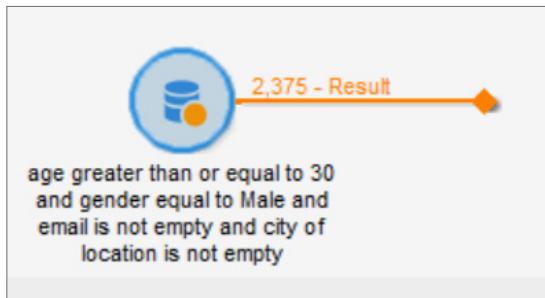
25. Expand the **Location** node and then double-click **City**, as shown. The field is added to the **Expression** column.



26. Click the **Operator** field and select **is not empty**, as shown.



27. Click the **Preview** tab to view the query results. Click the **Configure list** icon and select **Location > City**.
28. Click **OK** to close the **List configuration 'Recipients (nms)**' window.
29. Observer the new results in the **Query** window.
30. Click **Finish** to close the **Query** window.
31. Click **Ok** in the **Query** dialog box.
32. Click **Save** to save the workflow.
33. Click the **Start** icon to start the workflow and verify the number of recipients included in the segment, as shown:



Stay on this page for the next exercise.



**Note:** The results may vary from the result shown above.

## Exercise 6: Create and run the advanced queries

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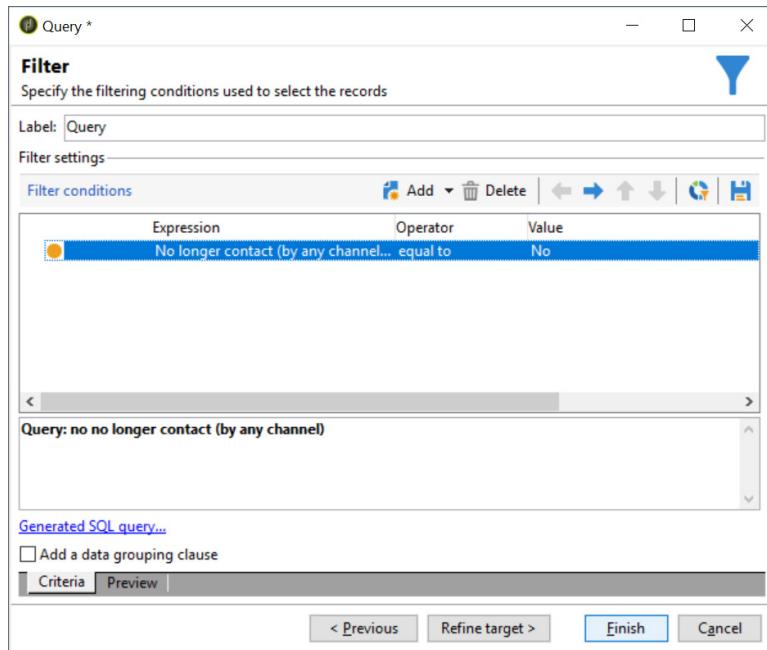
**Scenario:** In the previous exercise, you created queries to check the recipients in different segments. Now, you are asked to create queries to check the customers who have provided profile information so they can be contacted. You also are creating these queries for those customers who provided profile information but prefer not to be contacted. This exercise includes the following tasks:

1. Create a query to display the list of people who can be contacted
2. Create a query to display the list of women based on age criteria
3. Create a query by using the include operator

### Task 1: Create a query to display the list of people who can be contacted

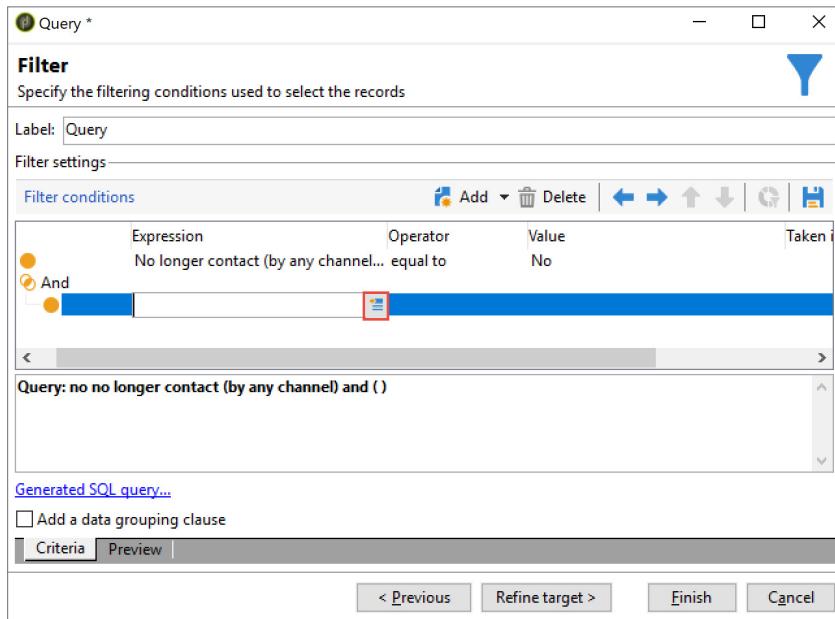
1. On the **Targeting and workflows** tab, click the **Add** icon. The **New targeting workflow** dialog box opens.
2. Keep the default workflow template.
3. In the **Label** field, type **Filter recipients\_profiles\_with\_data\_<yourinitials>**. For example, type **Filter recipients\_profiles\_with\_data\_JS**.
4. Click **Ok**. The new workflow is added to the list of workflows.
5. Drag a **Query** activity onto the workflow.
6. Double-click the **Query** activity. The **Query** dialog box opens.
7. Click **Edit query**. The **Targeting and filtering dimension** page opens.
8. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
9. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.
10. Select **No longer contact (by any channel)** and click **Finish**. The expression is added to the **Expression** field. The **Operator** field is auto populated with **equal to**.

11. Click the **Value** field and select **No** from the drop-down list, as shown:



12. Click **Add**. A new field is added to **Expression** and click **Add** a parenthesis level.

13. In the newly created condition, click the **Edit expression** icon, as shown. The **Select an expression** dialog box opens.



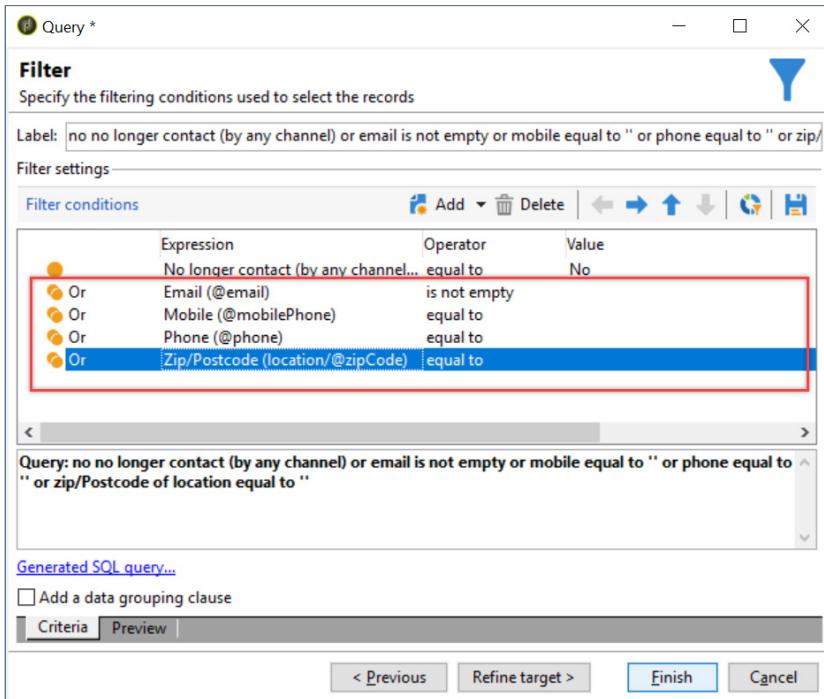
14. Select **Email** and click **Finish**.

15. Click the **Operator** drop-down arrow and select **is not empty** from the drop-down list.

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

17. Click **Add**. A new field is added.

18. Define the expression, as shown:



19. Click the **Preview** tab to view the query results.

20. Click **Finish** to close the **Filter** page.

21. Click **Ok** in the **Query** dialog box.

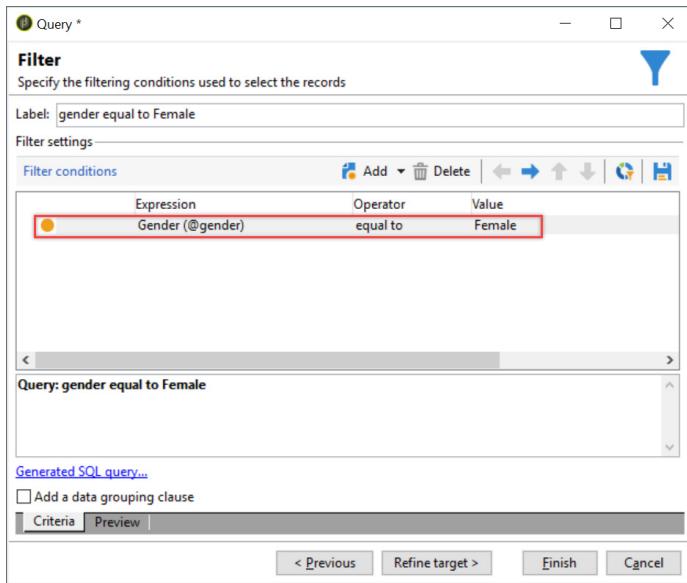
22. Click **Save** to save the workflow.

23. Run the workflow by clicking the **Start** button.

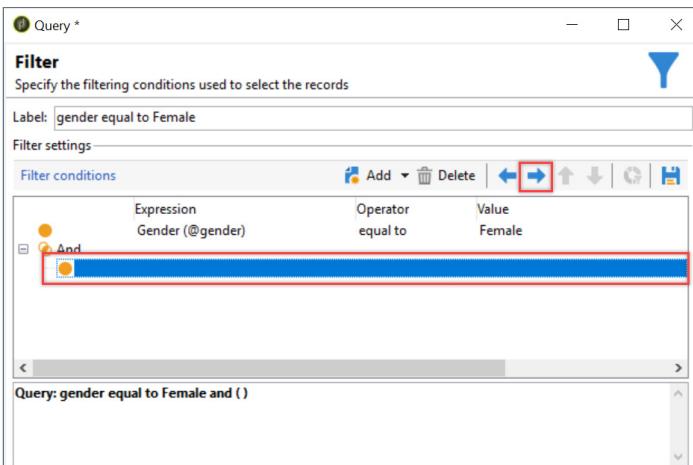
## Task 2: Create a query to display the list of women based on age criteria

1. On the **Targeting and workflows** tab, click the **Add** icon. The **New targeting workflow** dialog box opens.
2. Keep the default workflow template.
3. In the **Label** field, type **Filter recipients\_female\_age\_<your initials>**. For example, type **Filter recipients\_female\_age\_JS**.
4. Click **Ok**. The new workflow is added to the list of workflows.
5. Drag a **Query** activity onto the workflow.
6. Double-click the **Query** activity. The **Query** dialog box opens.
7. Click **Edit query**. The **Targeting and filtering dimension** page opens.

8. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
9. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.
10. Select **Gender** and click **Finish**. The expression is added to the **Expression** field. The **Operator** field is autopopulated with the **equal to** entry.
11. Click the **Value** field and select **Female**, as shown:

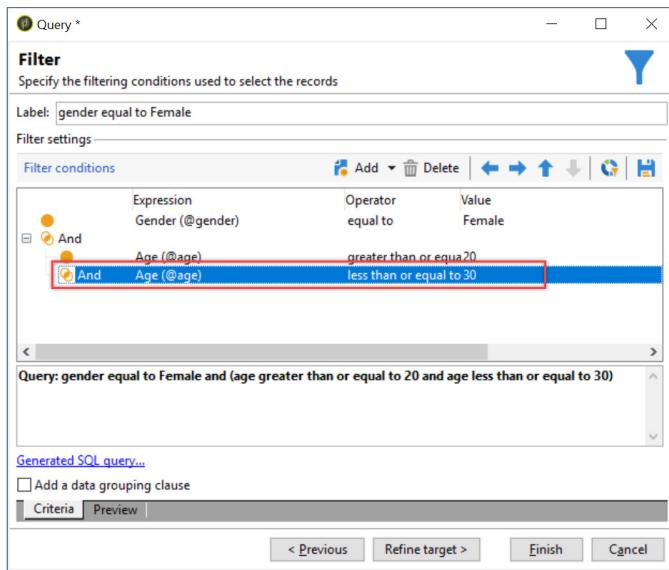


12. Click **Add**. A new field is added to **Expression**.
13. Click the **Add a parenthesis level** icon, as shown. A new level is added to the expression, as shown:

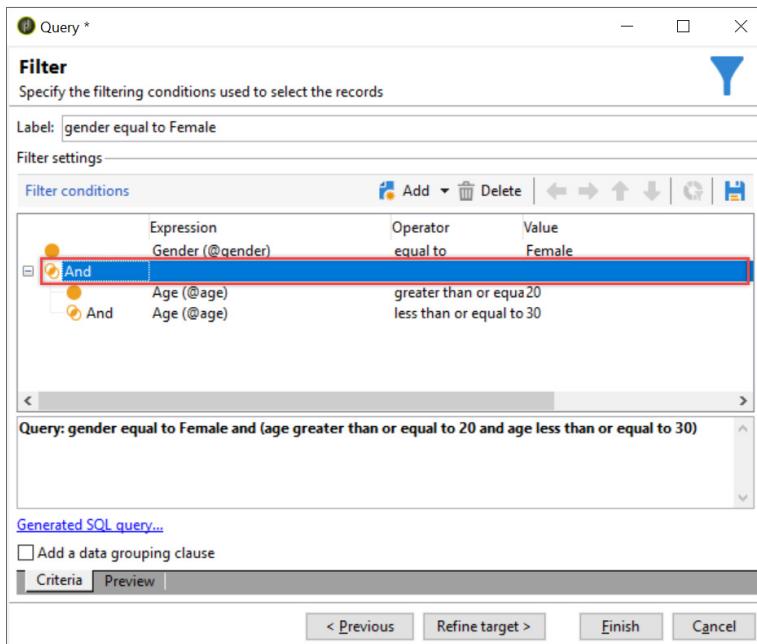


14. In the newly created level, click the **Edit expression** icon. The **Select an expression** dialog box opens.
15. Select **Age** and click **Finish**.

16. Click the **Operator** field and select **greater than or equal to**.
17. Click the **Value** field and type **20**.
18. Click **Add**. A new field is added with the **And** operator.
19. Click the **Edit expression** icon. The **Select an expression** dialog box opens.
20. Select **Age** and click **Finish**.
21. Click the **Operator** field and select **less than or equal to**.
22. Click the **Value** field and type **30**, as shown:



23. Click the first **And** operator, as shown:



24. Click **Add**. A new field is added, as shown:

The screenshot shows the 'Filter' dialog box with the following details:

- Label:** gender equal to Female
- Filter settings:** And operator selected.
- Filter conditions:** A tree view of the query structure:
  - Top level: And
    - Gender (@gender) = equal to Female
  - Middle level: And
    - Age (@age) >= 20
    - Age (@age) <= 30
  - Bottom level: And (highlighted with a red box)
- Generated SQL query...**: Query: gender equal to Female and (age greater than or equal to 20 and age less than or equal to 30) and
- Buttons:** Add, Delete, Up, Down, Save, Cancel.

25. Click the **Add a parenthesis level** icon. A new level is added to the expressions.

26. Click the **Edit expression** icon in the newly created level. The **Select an expression** dialog box opens.

27. Select **Age** and click **Finish**.

28. Click the **Operator** field and select **greater than or equal to** from the drop-down list.

29. Click the **Value** field and type **40**.

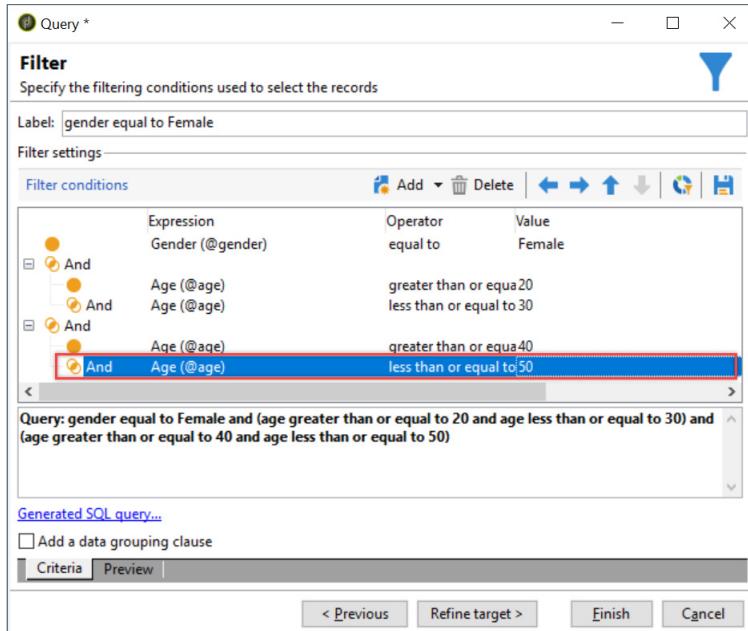
30. Click **Add**. A new field is added with the **And** operator.

31. Click the **Edit expression** icon. The **Select an expression** dialog box opens.

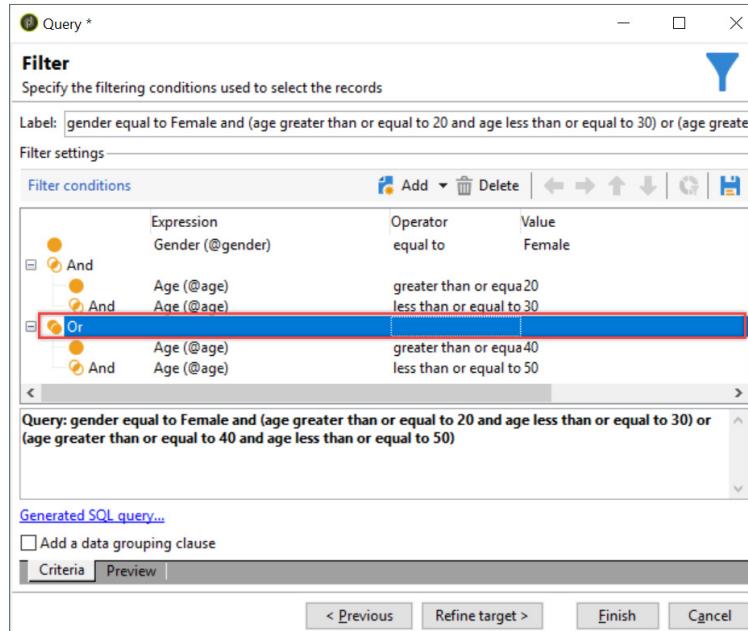
32. Select **Age** and click **Finish**.

33. Click the **Operator** field and select **less than or equal to** from the drop-down list.

34. Click the **Value** field and type **50**, as shown:



35. Click the second main **And** operator and select **Or** from the drop-down list, as shown:



36. Click the **Preview** tab to view the results of the query.

37. Click **Finish** to close the **Filter** page.

38. In the **Label** field at the top of the page, type **Female 20–30 and 40–50**.

39. Click **Ok** in the **Query** dialog box.

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

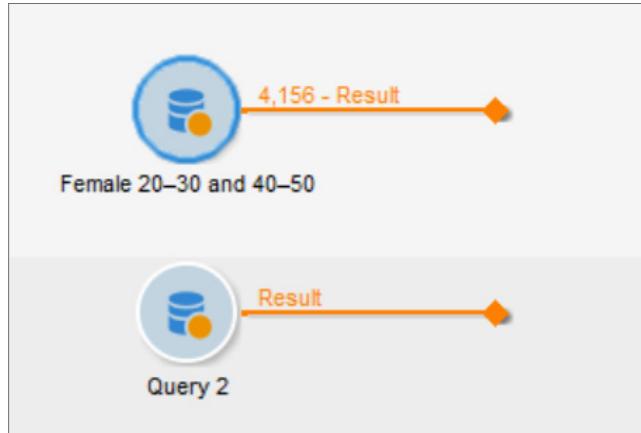
41. Click the **Start** icon to start the workflow and view the results, as shown. Stay on this page for the next task.



**Note:** The results may vary from the result shown above based on the profiles.

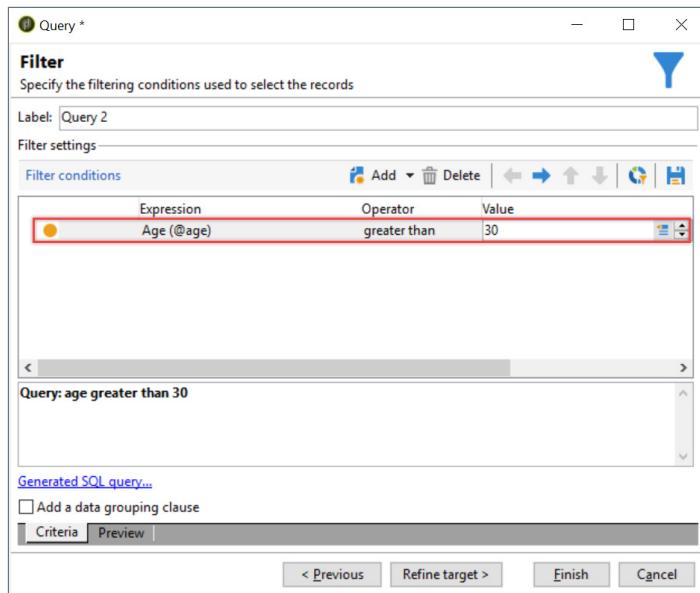
### Task 3: Create a query by using the include operator

1. Drag a **Query** activity onto the workflow below the first query you created (in the previous task), as shown:

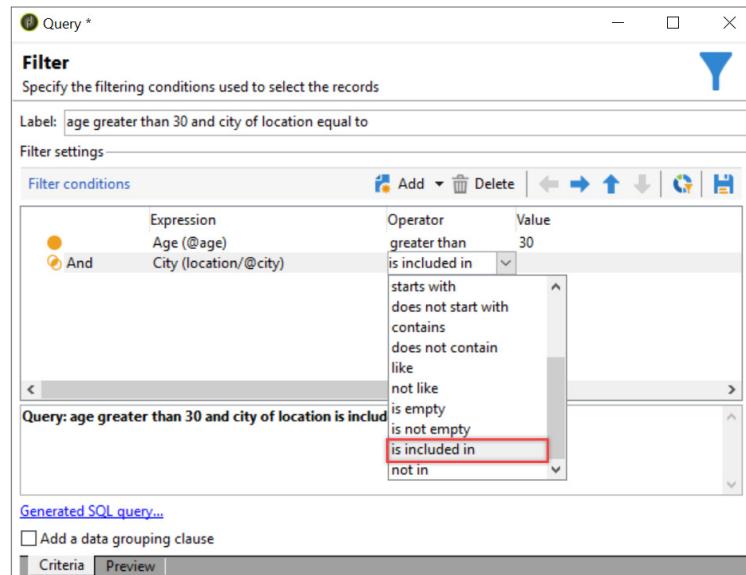


2. Double-click the **Query 2** activity. The **Query** dialog box opens.
3. Click **Edit query**. The **Targeting and filtering dimension** page opens.
4. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
5. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.
6. Select **Age** and click **Finish**. The expression is added to the **Expression** field.
7. Click the **Operator** drop-down arrow and select **greater than**.

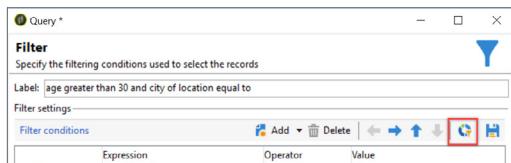
8. In the **Value** field, type **30**, as shown:



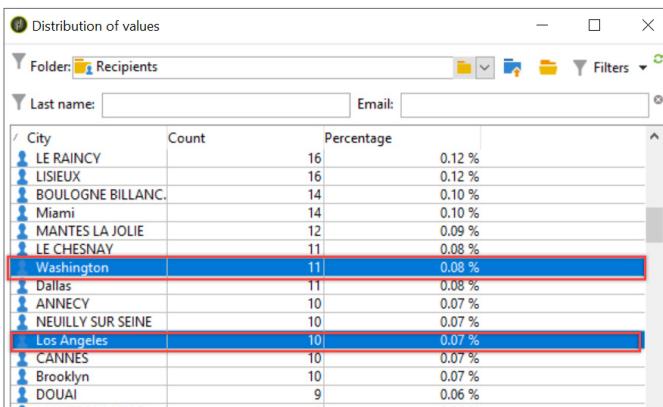
9. Click **Add**. A new expression field is added.  
 10. Click the **Edit expression** icon in the new field. The **Select an expression** dialog box opens.  
 11. Expand **Location** and select **City**.  
 12. Click **Finish**. The expression is added to the field.  
 13. Click the **Operator** drop-down arrow and select **is included in** from the drop-down list, as shown:



14. Click the **Value** field and select the **Distribution of values** icon (circular graph in the upper right), as shown. The **Distribution of values** dialog box opens.



15. Press the **Ctrl** key and select **Los Angeles**, **Washington**, and **New York**, as shown:



16. Click **Ok** to go back to the **Filter** page.  
 17. Click the **Preview** tab to review the results of the query.  
 18. Click **Finish** to close the **Filter** page.  
 19. Click **Ok** to close the **Query** dialog box.  
 20. Click **Save** to save the workflow.  
 21. Click the **Start** icon to start the workflow and view the results, as shown:



Stay on this page for the next exercise.

## Exercise 7: Create simple queries that use functions

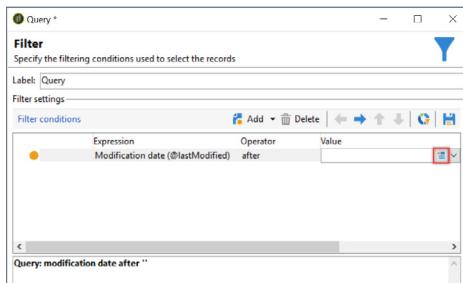
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In this exercise, you will perform the following tasks:

1. Create a query by using the DaysAgo function
2. Create a query by using the MonthsAgo function
3. Create a query to display by using the Day(date), Month(date) and GetDate() functions

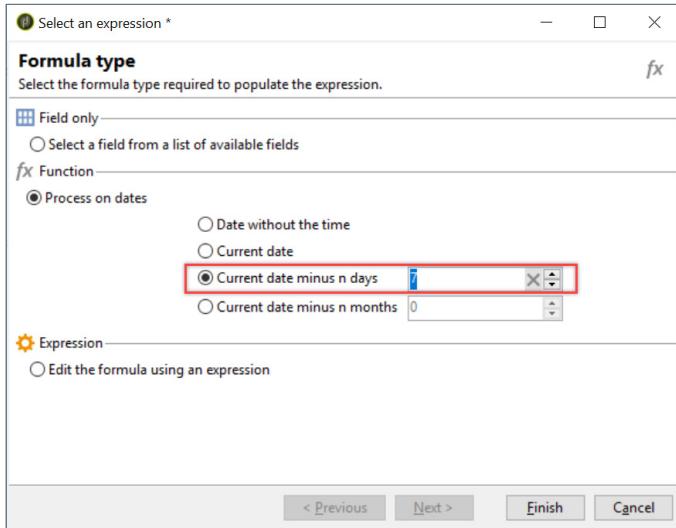
### Task 1: Create a query by using DaysAgo function

1. On the **Targeting and workflows** tab, click the **Add** icon. The **New targeting workflow** dialog box opens.
2. Keep the default workflow template.
3. In the **Label** field, type **Filter recipients\_specificdates\_<your initials>**. For example, type **Filter recipients\_specificdates\_JS**.
4. Click **Ok**. The new workflow is added to the list of workflows.
5. Drag a **Query** activity onto the workflow.
6. Double-click the **Query** activity. The **Query** dialog box opens.
7. Click **Edit query**. The **Targeting and filtering dimension** page opens.
8. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
9. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.
10. Select **Modification date** and click **Finish**.
11. Click the **Operator** drop-down arrow and select **after** from the drop-down list.
12. In the **Value** field, click the **Edit expression** icon, as shown. The **Formula type** page opens.

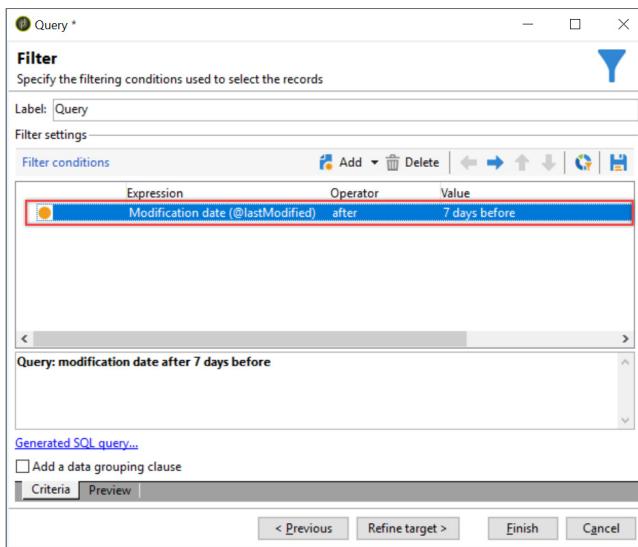


13. In the **Function** section, select the **Current date minus n days** option.

14. In the **Current date minus n days field**, type **7**, as shown:



15. Click **Finish** to go back to the **Filter** page. The filtering condition is updated, as shown:



16. Click the **Preview** tab to view query results.

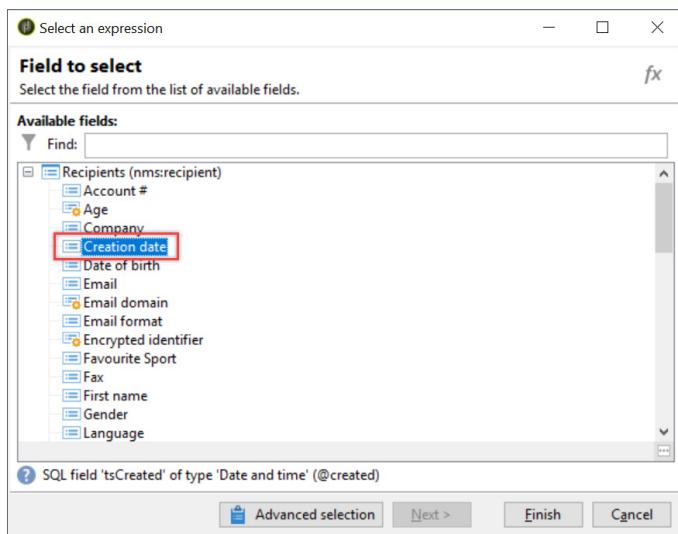
17. Click **Finish** to close the **Filter** page.

18. Click **Ok** in the **Query** dialog box.

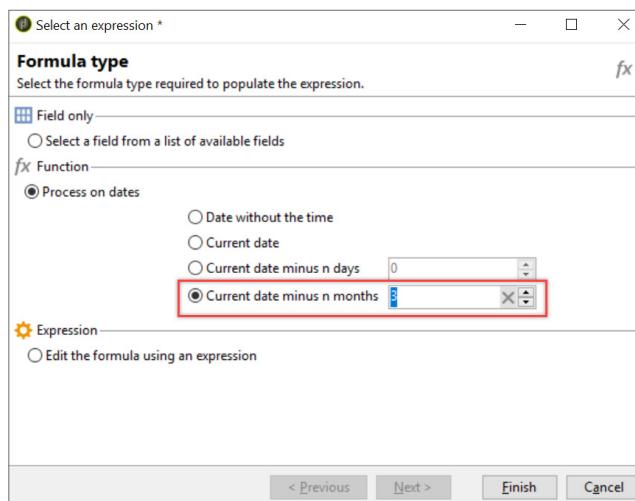
19. Click **Save** to save the workflow. Stay on this page for the next exercise.

## Task 2: Create a query by using MonthsAgo function

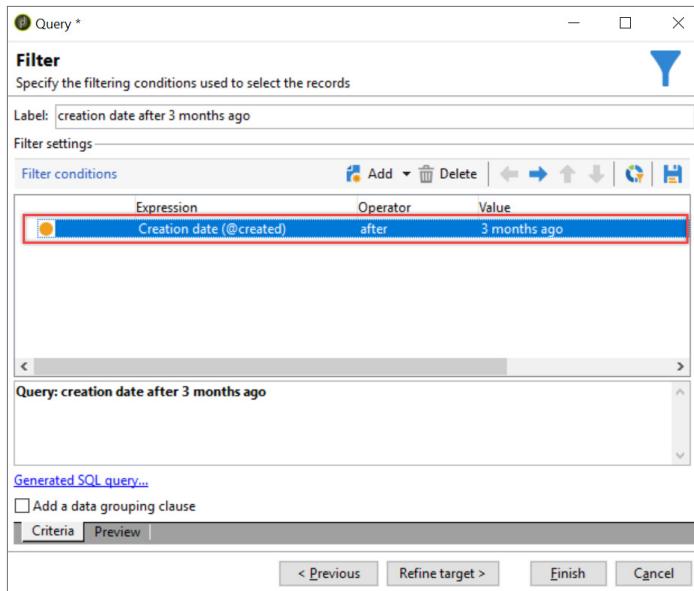
1. Drag a new **Query** activity onto the workflow below the query you created in the previous task.
2. Double-click the **Query 2** activity. The **Query** dialog box opens.
3. Click **Edit query**. The **Targeting and filtering dimensions** page opens.
4. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
5. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.
6. Select **Creation date**, as shown, and click **Finish**.



7. Click the **Operator** drop-down arrow and select **after** from the drop-down list.
8. In the **Value** field, click the **Edit expression** icon. The **Formula type** page opens.
9. In the **Function** section, select the **Current date minus n months** option.
10. In the **Current date minus n months** field, type **3**, as shown:



11. Click **Finish** to go back to the **Filter** page. The filtering condition will look similar to the one shown below:

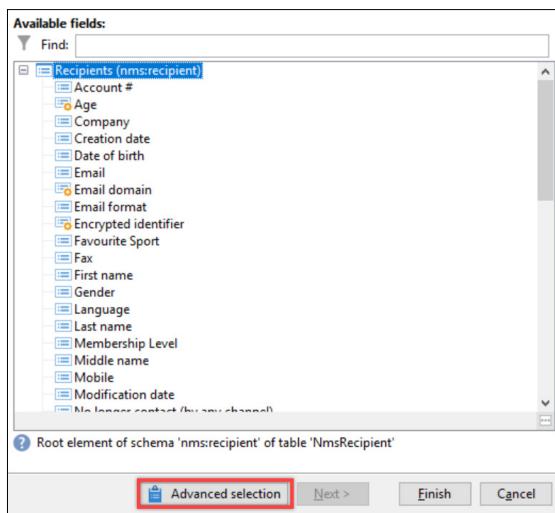


12. Click the **Preview** tab to view query results.  
13. Click **Finish** to close the **Filter** page.  
14. Click **Ok** in the **Query** dialog box.  
15. Click **Save** to save the workflow. Stay on this page for the next task.

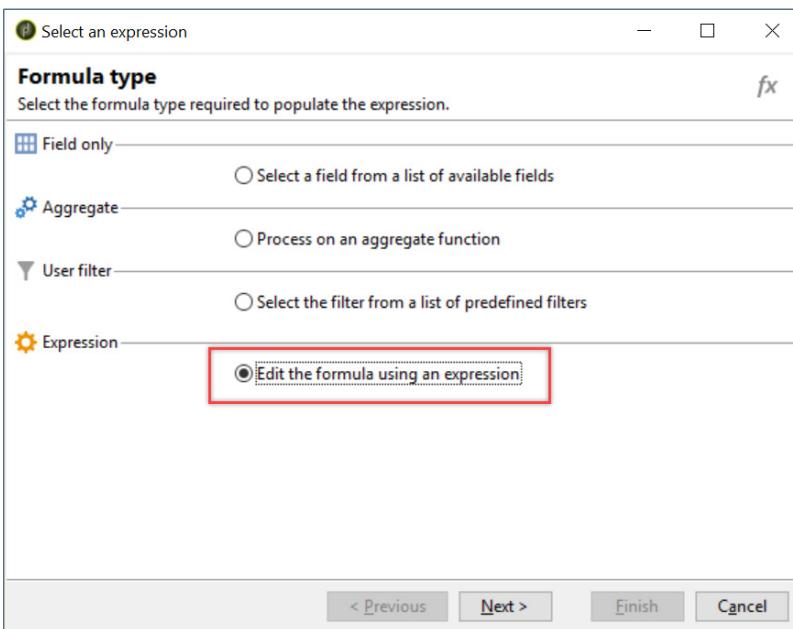
### Task 3: Create a query to select by using Day(date), Month(date) and GetDate() functions

1. Drag a new **Query** activity onto the workflow.
2. Double-click the **Query 3** activity. The **Query** dialog box opens.
3. Click **Edit query**. The **Targeting and filtering dimensions** page opens.
4. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
5. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.

6. Click **Advanced selection**, as shown. The **Formula type** page opens.

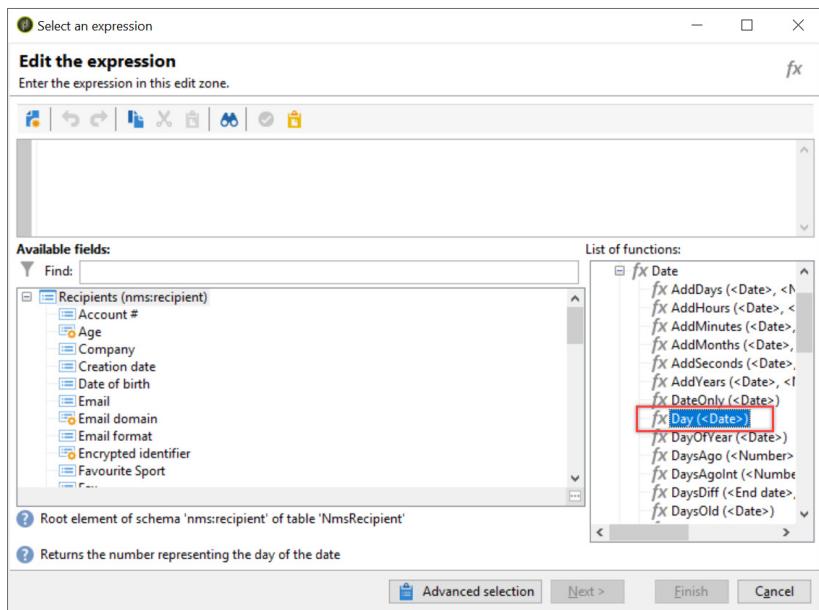


7. In the **Expression** section, select the **Edit the formula using an expression** option, as shown:



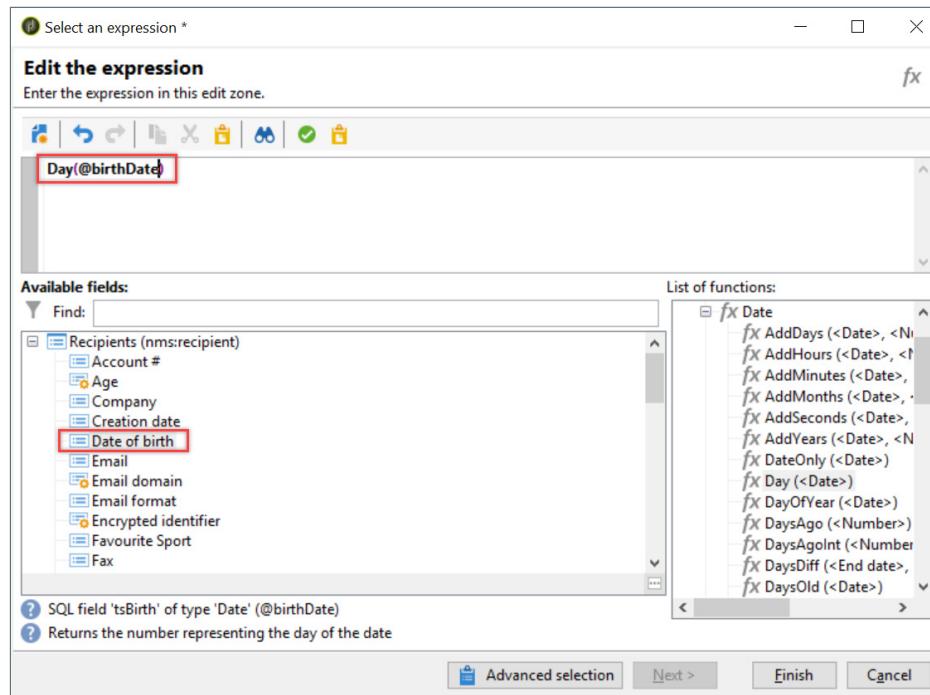
8. Click **Next**. The **Edit the expression** dialog box opens.

9. In the **List of functions** section, expand the **Date** node and double-click **Day (<Date>)**, as shown:

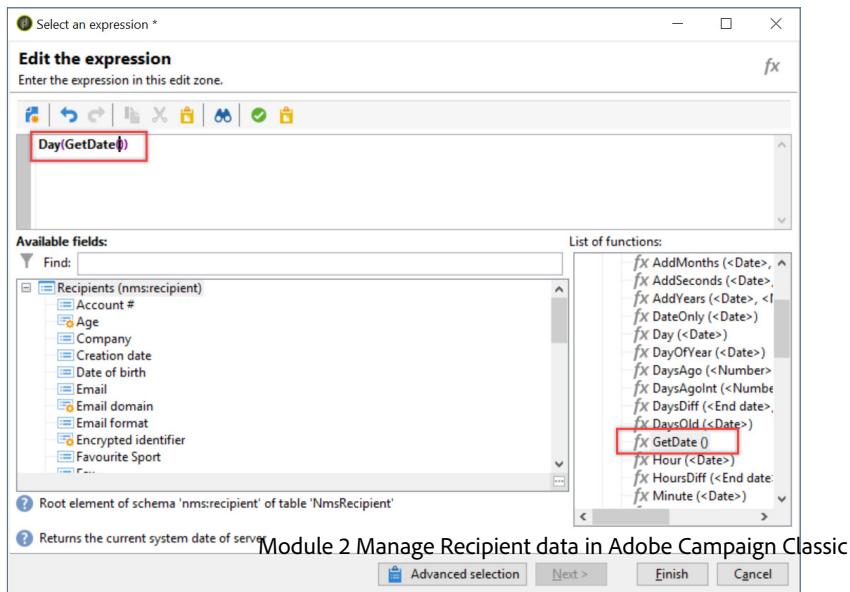


The function is added to the edit zone as **Day()**.

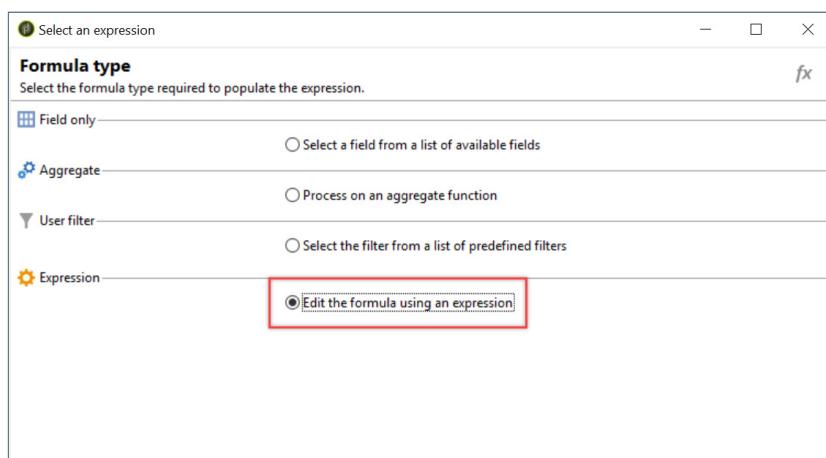
10. Place the cursor inside the parentheses and double-click **Date of birth** from the **Available fields** section. The field is added to the edit zone, as shown:



11. Click **Finish**. The expression is added to the **Filter** page.
12. In the **Value** field, click the **Edit expression** icon
13. In the **List of functions** section, expand the **Date** node and double-click **Day (<Date>)**.  
The function is added to the edit zone as **Day()**.
14. Place the cursor inside the parentheses, navigate to **List of functions > Date node >** and double-click **GetDate()**. The field is added to the edit zone, as shown:

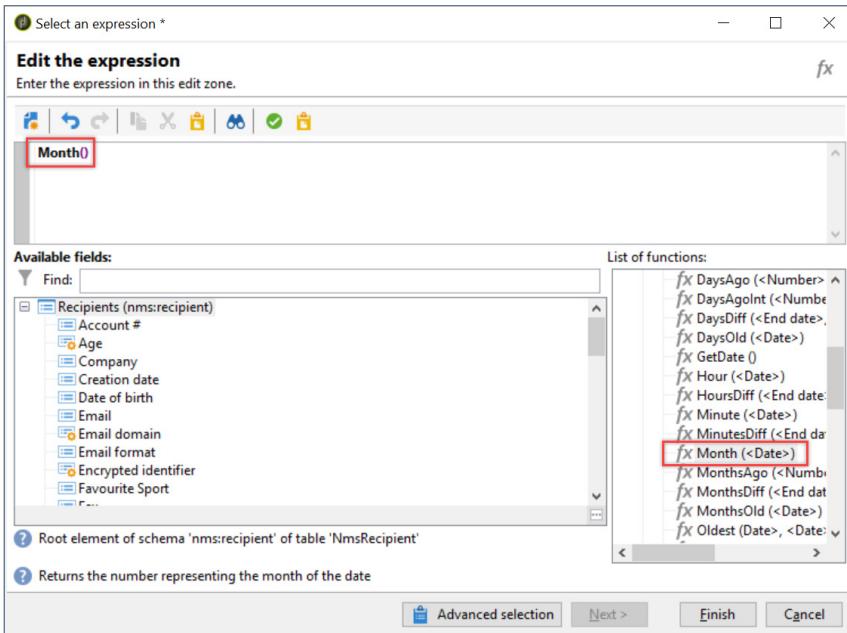


15. Click **Finish**. The expression is updated in the **Query** dialog box.
16. Click **Add** to add a new expression.
17. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.
18. Click **Advanced selection**. The **Formula type** page opens.
19. In the **Expression** section, select the **Edit the formula using an expression** option, as shown:

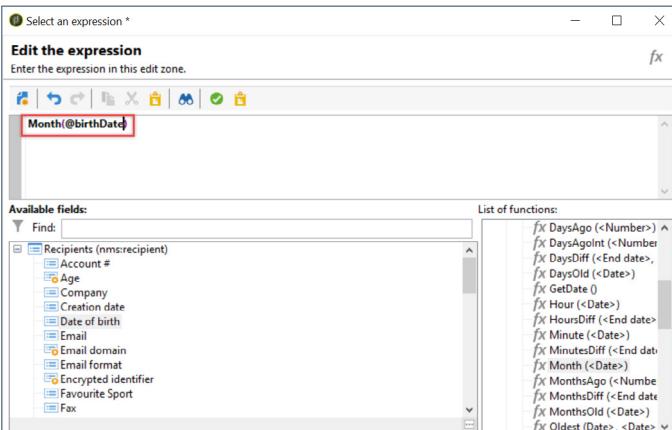


20. Click **Next**. The **Edit the expression** dialog box opens.

21. In the **List of functions** section, expand the **Date** function and double-click **Month (<Date>)**. The function is added to the edit zone as **Month()**, as shown:



22. Place the cursor inside the parentheses and double-click **Date of birth** from the **Available fields** section. The field is added to the edit zone, as shown:



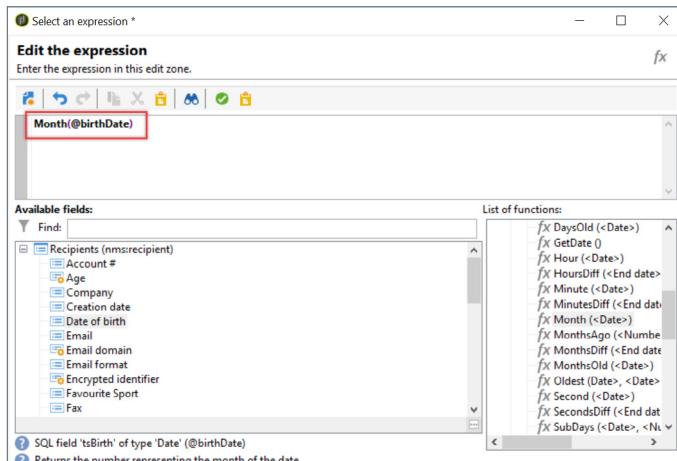
23. Click **Finish**. The expression is added to the **Filter** page.

24. In the **Value** field, click the **Edit expression** icon.

25. In the **List of functions** section, expand the **Date** node and double-click **Month (<Date>)**.

The function is added to the edit zone as **Month()**.

26. Place the cursor inside the parentheses, navigate to **List of functions** > **Date** node > and double-click **GetDate()**. The field is added to the edit zone, as shown:



27. Click **Finish**. The **Filter** page is updated.

28. Click the **Preview** tab to preview the results of the query.

29. Click **Finish** to close the **Filter** page.

30. Click **Ok** in the **Query** dialog box.

31. Click **Save** to save the workflow. Stay on this page for the next exercise.

32. Restart the workflow.

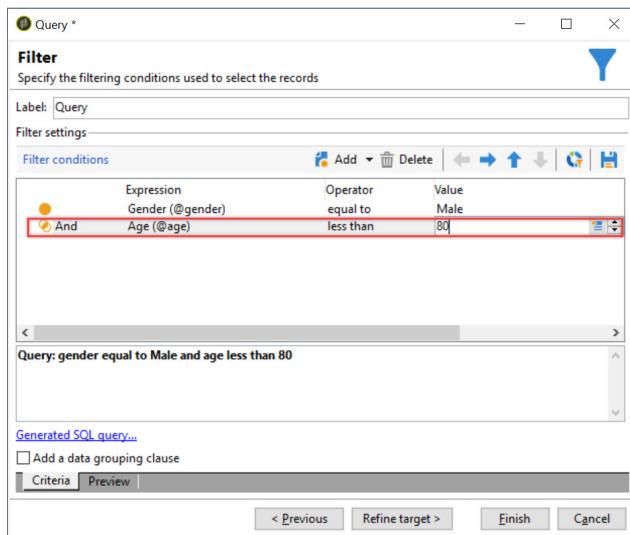
## Exercise 8: Combine the results of multiple queries

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In this exercise, you will create a workflow to target the male recipients who are in specific age group and city and also exclude those who do not want to be contacted.

1. On the **Targeting and workflows** tab, click the **Add** icon. The **New targeting workflow** dialog box opens.
2. Keep the default workflow template.
3. In the **Label** field, type **Apparel sale\_male\_<your initials>**. For example, type **Apparel sale\_male\_JS**.
4. Click **Ok**. The new workflow is added to the list of workflows.
5. Drag a **Query** activity onto the workflow.
6. Double-click the **Query** activity. The **Query** dialog box opens.
7. Click **Edit query**. The **Targeting and filtering dimension** page opens.
8. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
9. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.
10. Select **Gender** and click **Finish**. The expression is added to the **Filter** page and the **Operator** field is auto-populated with **equal to**.
11. Click the **Value** field and select **Male** from the drop-down list.
12. Click **Add** to add another filtering condition.
13. Click the **Edit expression** icon in the newly added field. The **Select an expression** dialog box opens.
14. Select **Age** and click **Finish**. The expression is added to the **Filter** page.
15. Click the **Operator** drop-down arrow and select **less than**.

16. In the **Value** field, type **80**, as shown:



17. Click the **Preview** tab to view the results of the query.

18. Click **Finish** to close the **Filter** page.

19. Click **Ok** in the **Query** dialog box.

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

21. Drag another **Query** activity onto the workflow (below the query you just created) to create another query.

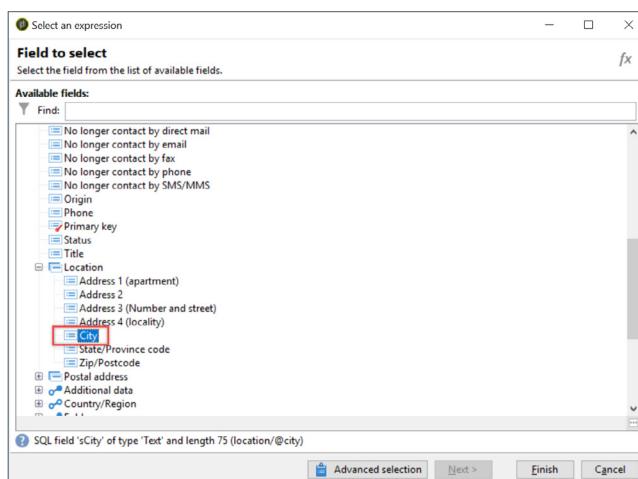
22. Double-click the **Query** activity. The **Query** dialog box opens.

23. Click **Edit query**. The **Targeting and filtering dimension** page opens.

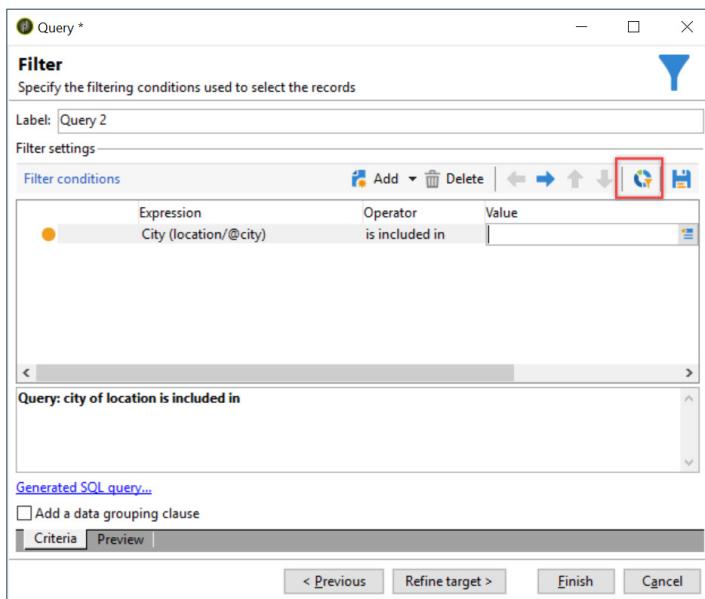
24. Select **Filtering conditions** and click **Next**. The **Filter** page opens.

25. Click the **Edit expression** icon in the **Expression** field. The **Select an expression** dialog box opens.

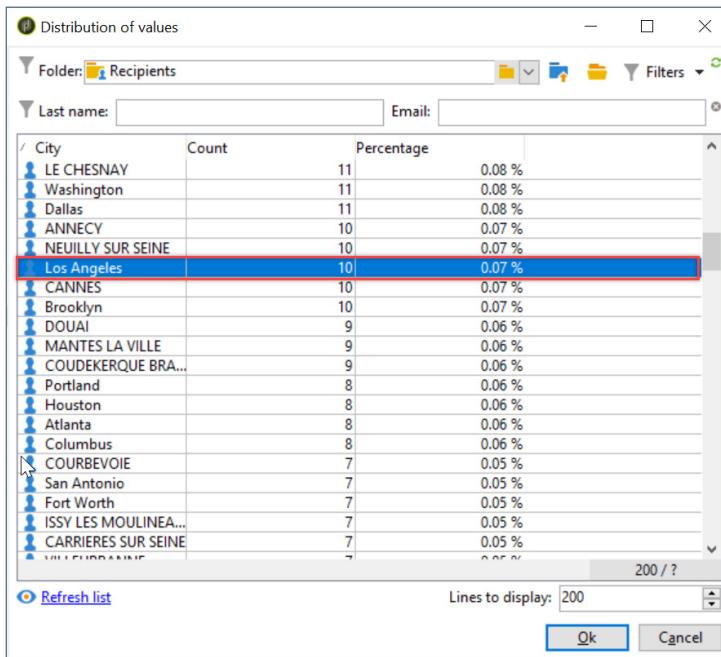
26. Expand the **Location** node and select **City**, as shown:



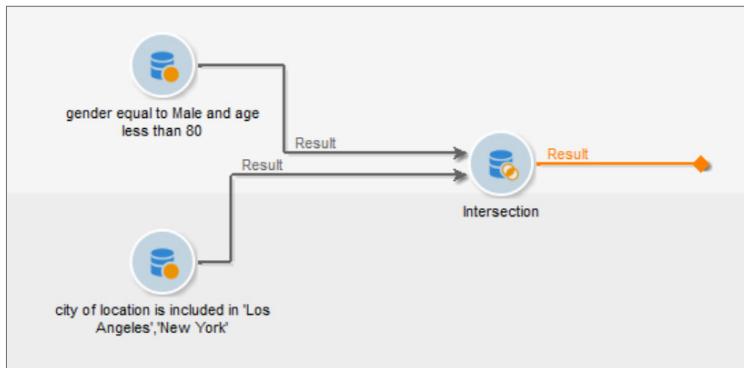
27. Click **Finish**. The expression is added to the field.
28. Click the **Operator** drop-down arrow and select **is included in** from the drop-down list.
29. Click the **Value** field and select the **Distribution of values** icon to display the distribution of values of the selected field for the recipients present in the current folder, as shown. The **Distribution of values** dialog box opens.



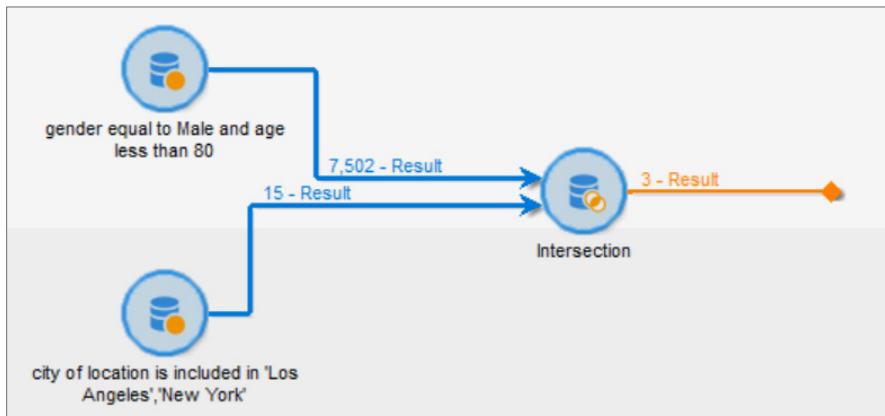
30. Press the **Ctrl** key and select **Los Angeles** and **New York**, as shown:



31. Click **Ok** to go back to the **Filter** page.
32. Click **Finish** to close the **Filter** page.
33. Click **Ok** in the **Query** dialog box.
34. Click **Save** to save the changes to your workflow.
35. Drag an **Intersection** activity from the **Targeting** palette onto the workflow and join the transition lines from the queries to the Intersection activity, as shown:



36. Click **Save** to save the workflow.
37. Click the **Start** icon. The workflow executes and generates the results, as shown:



The **Intersection** activity displays the combined result of the multiple queries. Stay on this page for the next exercise.

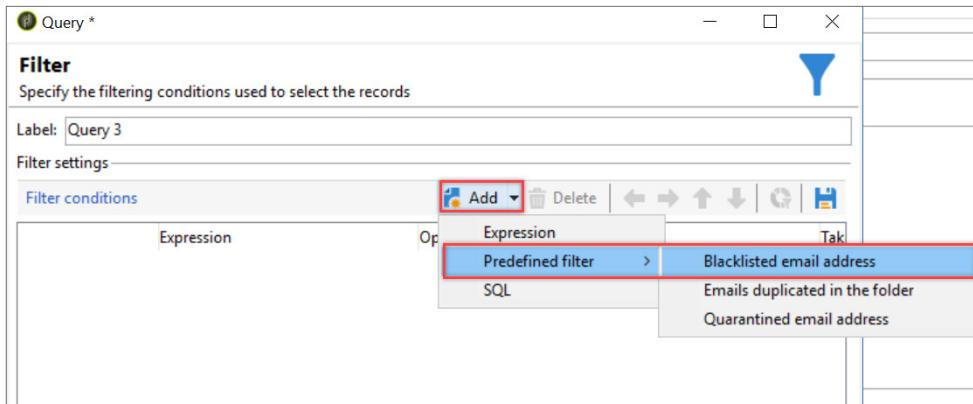


**Note:** The results may vary from the result shown above.

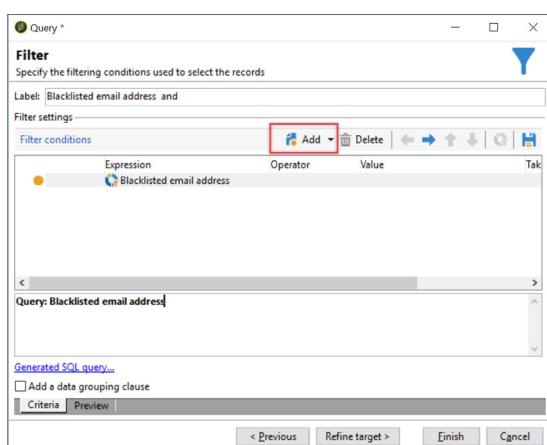
## Exercise 9: Apply standard exclusions

In this exercise, you will create a query to exclude blacklisted recipients and the recipients who have not provided an email address.

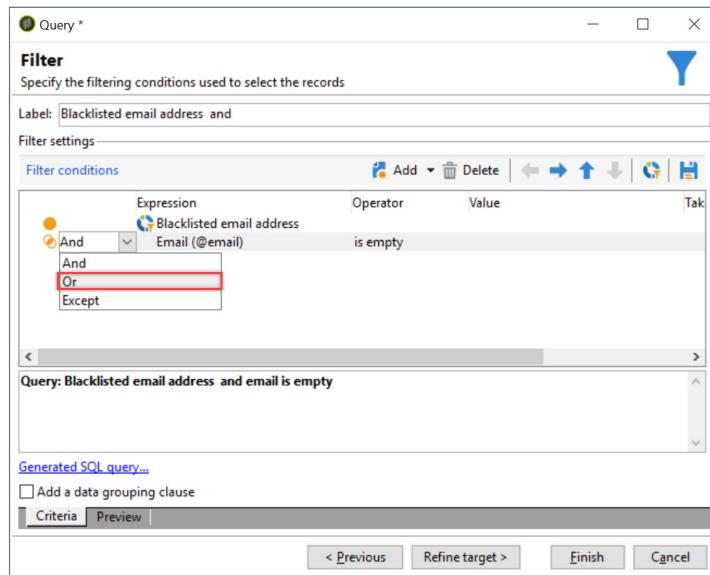
1. Add another **Query** activity to the workflow.
2. Double-click the **Query** activity. The **Query** dialog box opens.
3. Click **Edit query**. The **Targeting and filtering dimensions** page opens.
4. Select **Filtering conditions** and click **Next**. The **Filter** page opens.
5. Click the **Add** drop-down arrow and then select **Predefined filter > Blacklisted e-mail address**, as shown:



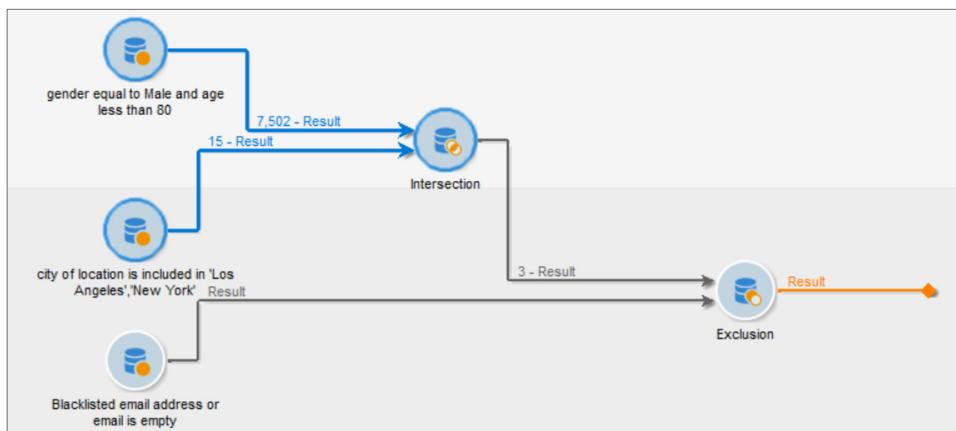
6. Click **Add**, as shown, to add another filter condition.



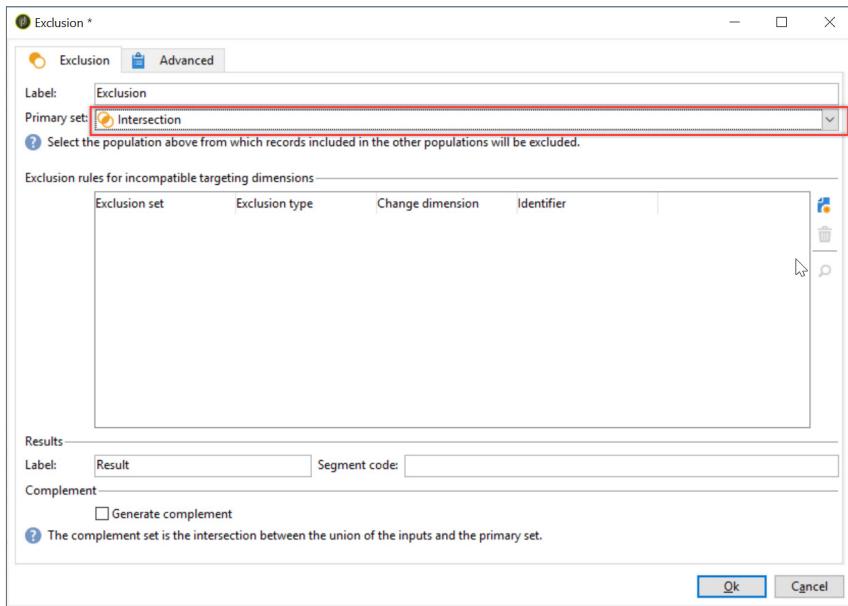
7. Click the **Edit expression** icon in the newly created field. The **Select an expression** dialog box opens.
8. Select **Email** and click **Finish**. The **Email (@email)** expression is added to the **Expression** field.
9. Click the **Operator** drop-down arrow and select **is empty** from the drop-down list.
10. Click the **And** operator and select **Or**, as shown:



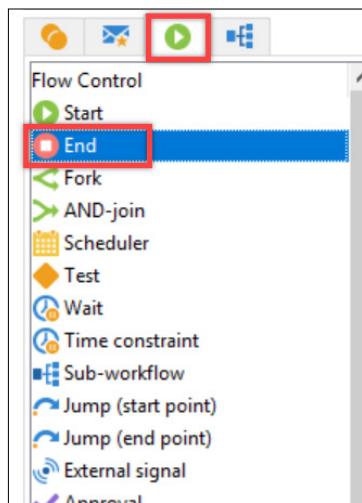
11. Click **Preview** to view the results of the query.
12. Click **Finish** to close the **Filter** page.
13. Click **Ok** in the **Query** dialog box.
14. Click **Save** to save the workflow.
15. Drag an **Exclusion** activity from the **Targeting** palette and place it after the intersection activity.
16. Join the transition line from the **Intersection** activity to the **Exclusion** activity.
17. Join the transition line from the **Blacklisted email address or email is empty** query activity that you just created (in this exercise) to the **Exclusion** activity, as shown:



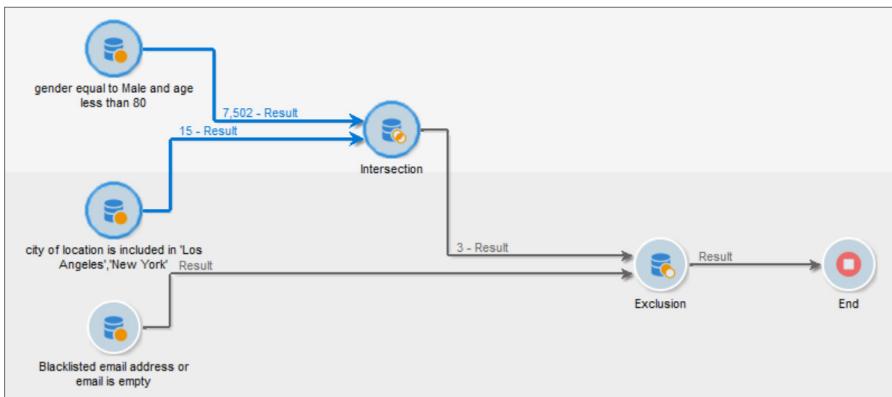
18. Double-click the **Exclusion** activity to open the **Exclusion** dialog box.
19. In the **Primary set** field, click the drop-down arrow and select **Intersection**, as shown:



20. Click **Ok** to go back to the workflow.
21. Drag an **End** activity from the Flow control palette, as shown:



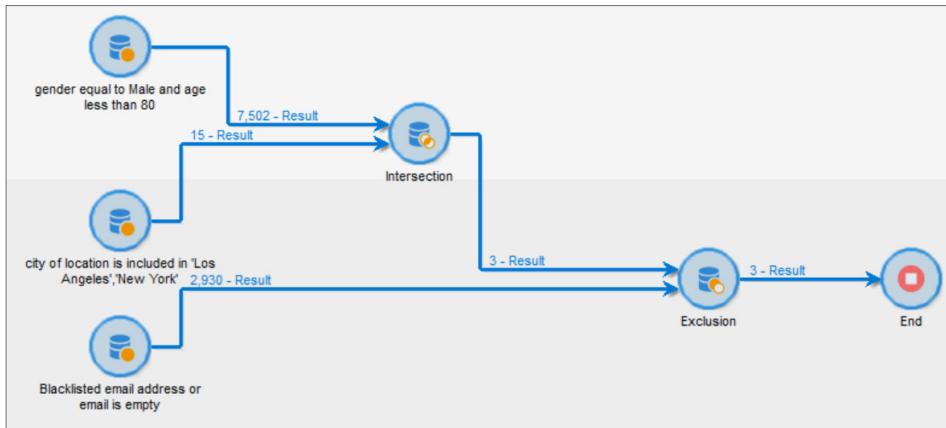
22. Join the **End** activity with the transition line from the **Exclusion** activity, as shown. The **End** activity enables you to terminate the workflow.



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

24. Click the **Restart** icon. A prompt will be displayed, asking if you want to stop the current workflow and cancel all activities in progress.

25. Click **Yes**. The workflow restarts and generates the results, as shown:



**Note:** The results may vary from the result shown above.

## Module 3

# Cross-Channel and Multi-Delivery Campaigns

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## Introduction

As a marketer, it is important for you to maintain customer engagement and provide great customer experiences. To do that, you need to create consistent customer journeys at all touchpoints.

Adobe Campaign Classic enables you to efficiently design, plan, execute, manage, and optimize cross-channel marketing campaigns that deliver a high return on marketing investment and drive loyalty.

## Objectives

After completing this module, you will be able to:

- Explain the communication channels in Campaign Classic
- Create and execute a multi-channel campaign
- Create a Delivery summary report of the multi-channel campaign
- Create a Descriptive analysis report of an Email delivery
- Describe control groups
- Create a multi-delivery campaign by using control groups
- Explain how to troubleshoot issues in Campaign Classic

# Communication Channels in Campaign Classic

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Campaign Classic enables you to:

- Target recipients
- Design personalized content for each recipient
- Send cross-channel campaigns including emails, SMS (Short Message Service), push notifications, and extract files that can be sent to your direct mail vendor
- Measure the effectiveness of campaigns by using various dedicated reports.

The table below describes different delivery channels in Campaign Classic:

Channel	Description
Email	The Email channel enables you to send personalized emails to the target population. It is necessary that the recipient profiles contain at least an email address to send an email delivery.
Mobile	The Mobile channel enables you to send personalized SMS messages to the target population. It is necessary that the recipient profiles contain at least a mobile telephone number to send an SMS.
Direct mail	The Direct mail channel enables you to generate an extraction file which contains files to mass deliver personalized letters to the target population. It is necessary that the recipient profiles contain at least their names and postal addresses to send a direct mail delivery.
Mobile application	The Mobile application channel enables you to use the Campaign Classic platform to send personalized notifications to iOS and Android terminals through apps. The two available delivery channels are in the iOS channel and the Android channel.

Cross-channel campaigns are single marketing communications that utilize multiple channels to reach a wider target audience based on the preferred recipient channel. Cross-channel campaigns are designed and executed in a single workflow.

Multi-channel campaigns are campaigns that are sent to different segments on different channels. So, all cross-channel campaigns are multi-channel, but not all multi-channel campaigns are cross-channel.

## Exercise 1: Create and execute a multi-channel campaign

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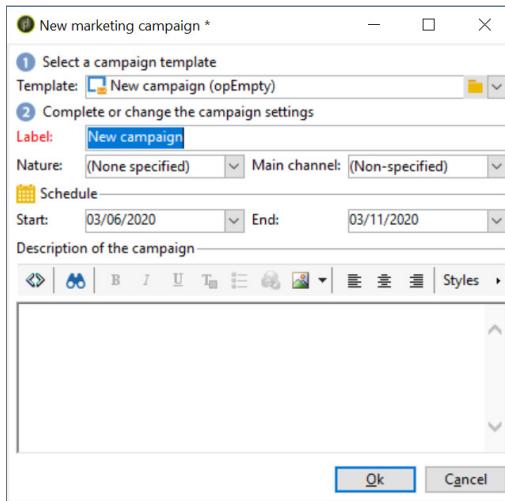
**Scenario:** You are working for the marketing team of We.Retail. Your team has asked you to identify the female customers who are above 20 years old and are not a part of any membership program. Your company is launching a campaign to provide a free Bronze membership to all identified recipients so that they receive timely offers to make purchases at We.Retail. You need to communicate the information to the identified recipients by using email, SMS, and direct mail. Also, you need to ensure that you exclude people who opted not to be contacted by any channel.

In this exercise, you will perform the following tasks:

1. Create a query to target the recipients who are females and above the age of 20
2. Create a query to target the recipients who are not a part of any membership program
3. Add an Intersection activity to combine the results of queries
4. Add an Exclusion activity to exclude the recipients who do not want to be contacted
5. Add a Split activity to identify the recipients whose email ID, mobile number, and zip code are not empty
6. Configure an email delivery, mobile delivery, and direct mail delivery
7. Execute the multi-channel campaign

**Task 1: Create a query to target the recipients who are females and above the age of 20**

1. Open the Adobe Campaign Client Console and click the **Explorer** option on the **Home** page.
2. Expand the **Campaign Management** folder and select **Campaigns**. The list of campaigns will be displayed in the list view, if any.
3. Click the **New** icon, as shown, on the list view. The **New marketing campaign** dialog box to create a new campaign is displayed, as shown:



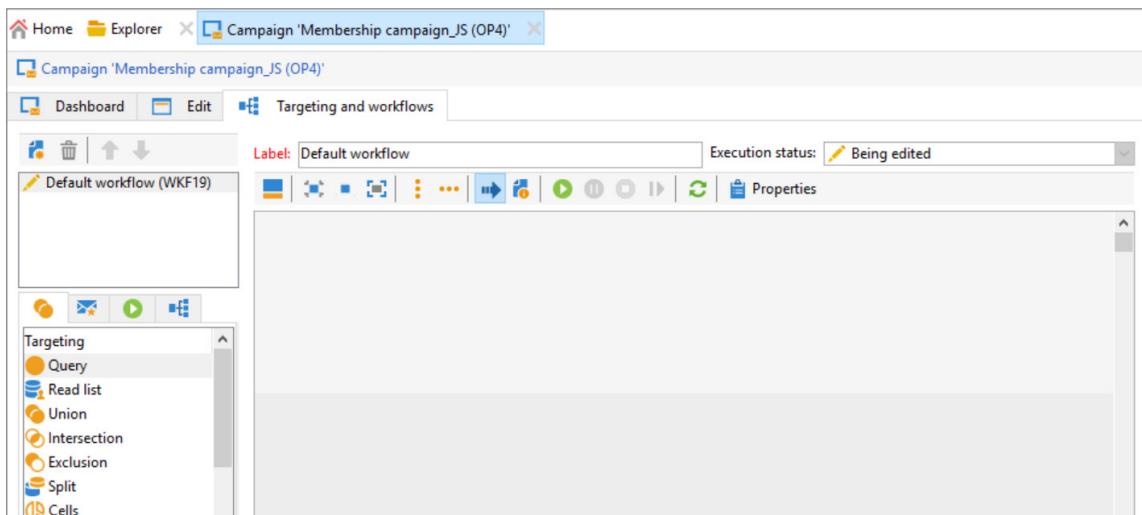
4. In the **Label** field, type **Membership campaign\_<your initials>**. For example, type **Membership campaign\_JS**.
5. Retain the default start date and end date.
6. Click **Ok**. The new campaign is added to the list of campaigns, as shown:

Label	Status	Start	End	Nature
Autumn sale offers...	Started	03/05/2020	03/10/2020	(None specified)
Membership campai... Started	In progress	03/06/2020	03/11/2020	(None specified)

7. Double-click the new campaign. The campaign opens in a new tab, as shown:



8. Click the **Targeting and workflows** tab to create a workflow for the campaign, as shown:

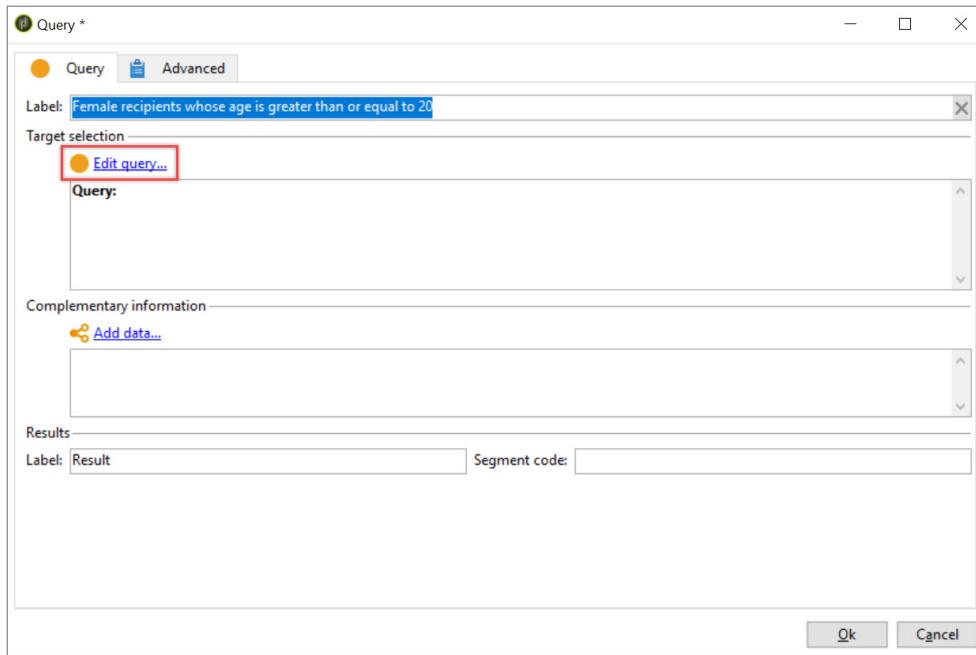


9. Drag a **Query** activity onto the workflow.

10. Double-click the **Query** activity. The **Query** dialog box opens.

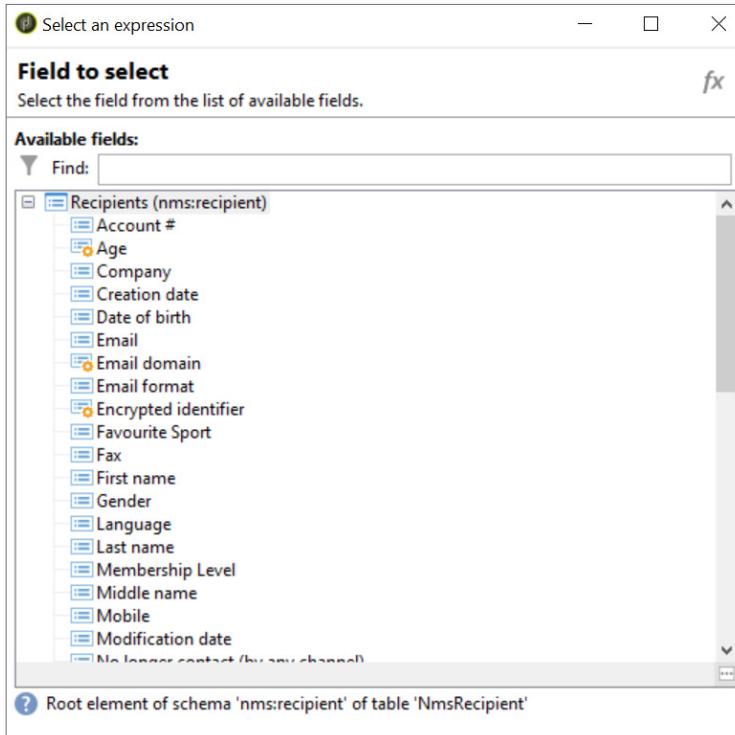
11. In the **Label** field, type **Female recipients whose age is greater than or equal to 20**.

12. Click **Edit query**, as shown. The **Targeting and filtering dimension** page opens.



13. Click **Filtering conditions** and then click **Next**. The **Filter** page opens.

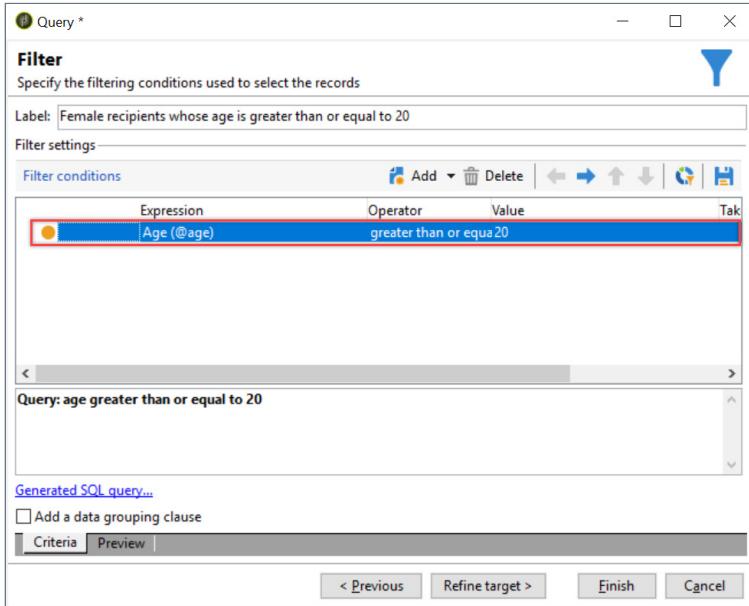
14. In the **Expression** field, click the **Edit expression** icon. The **Select an expression** dialog box opens, as shown:



15. Select **Age** and click **Finish**. The **Age** expression is added to the **Expression** field.

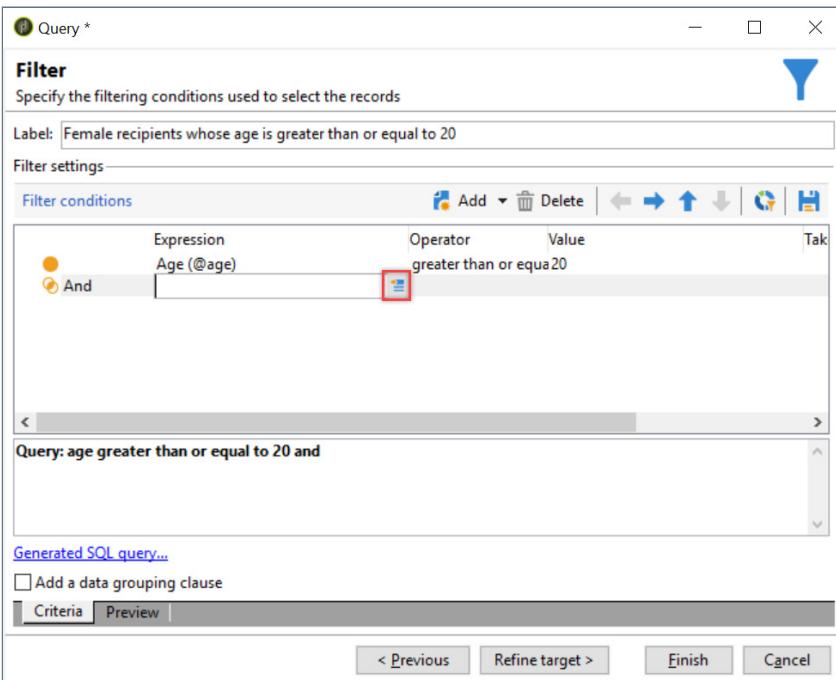
16. Click the **Operator** field and select **greater than or equal to** from the drop-down menu.

17. Click the **Value** field and type **20**, as shown:



18. Click **Add**. A new field is added to the **Expression** field.

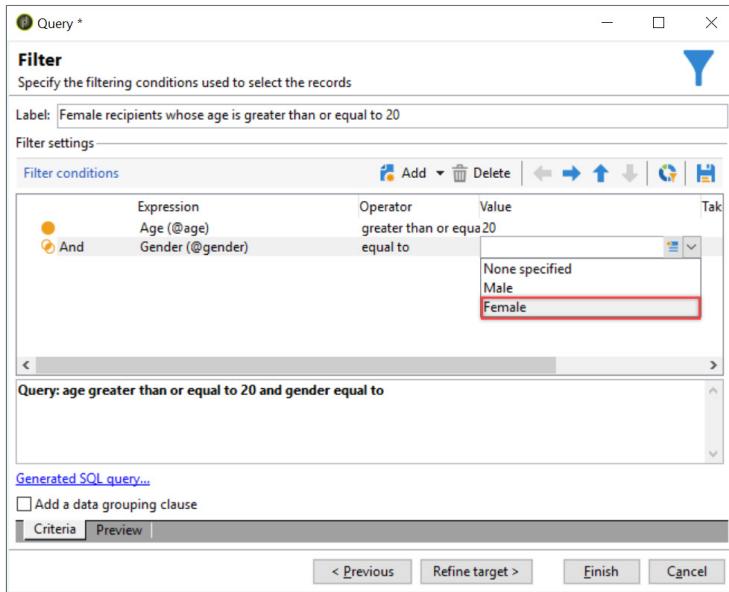
19. In the new **Expression** field, click the **Edit expression** icon, as shown. The **Select an expression** dialog box opens.



20. Select **Gender** and click **Finish**. The **Gender** expression is added to the **Expression** field.

21. Click the **Operator** field and select **equal to** (if not already selected) from the drop-down list.

22. Click the **Value** field and select **Female** from the drop-down list, as shown:



23. Click the **Preview** tab (at the bottom of the window) to view the results of the filtering conditions.

24. Click **Finish** to go back to the **Query** dialog box.

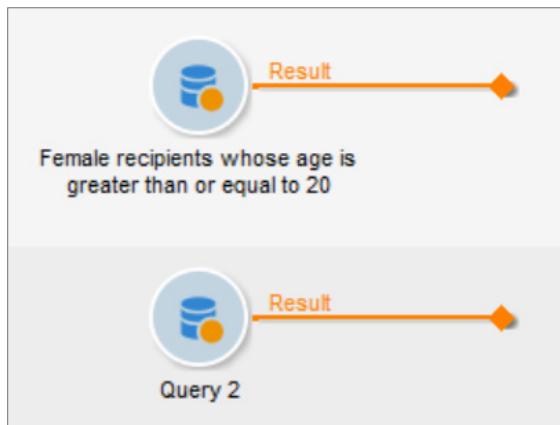
25. Click **Ok** to go back to the workflow.

26. Click **Save** to save the workflow, as shown:

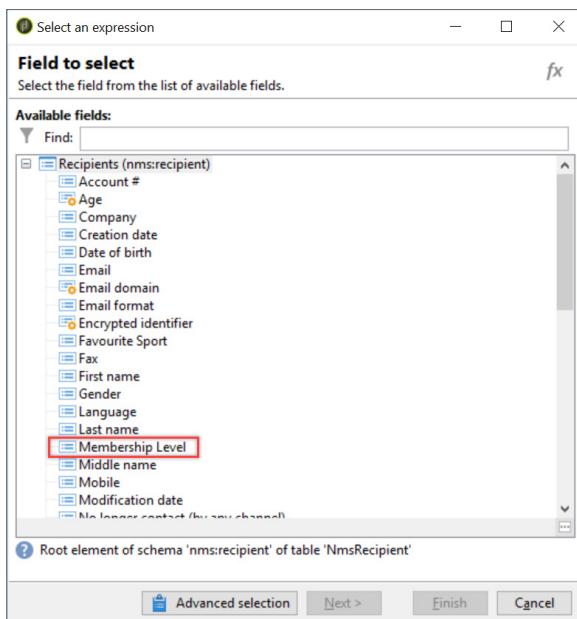


Task 2: Create a query to target the recipients who are not a part of any membership program

1. Drag a **Query** activity onto the workflow, as shown:

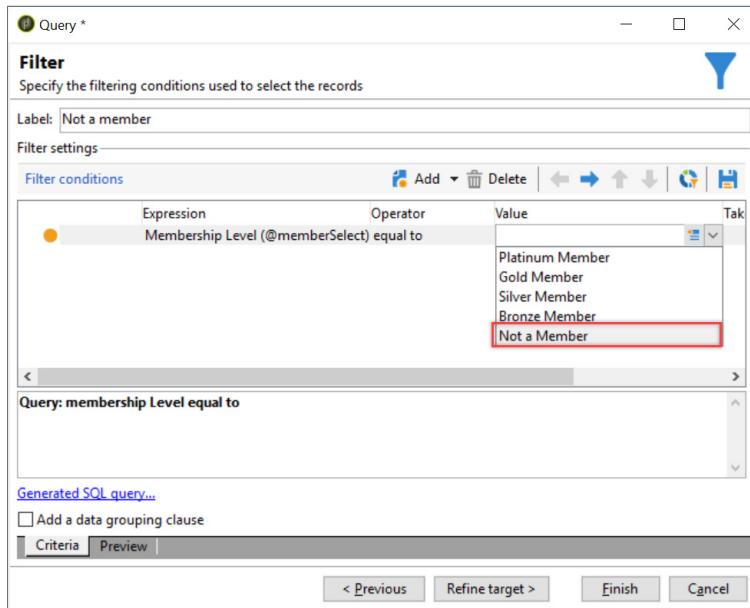


2. Double-click the **Query 2** activity. The **Query** dialog box opens.
3. In the **Label** field, type **Not a member**.
4. Click **Edit query**. The **Targeting and filtering dimension** page opens.
5. Click **Filtering conditions** and then click **Next**. The **Filter** page opens.
6. In the **Expression** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.
7. Select **Membership Level**, as shown, and click **Finish**. The **Membership Level(@memberSelect)** expression is added to the **Expression** field.



8. In the **Operator** field, if not selected by default, select **equal to** from the drop-down menu.

9. Click the **Value** field and select **Not a Member**, as shown:



10. Click **Preview** to view the results of the filtering conditions.

11. Click **Finish** to go back to the **Query** dialog box.

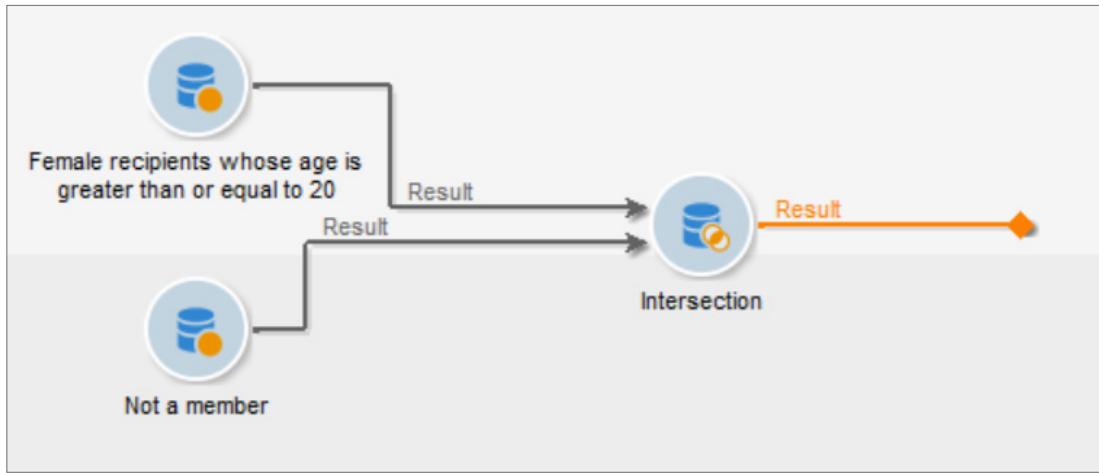
12. Click **Ok** to go back to the workflow.

13. Click **Save** to save the workflow, as shown:

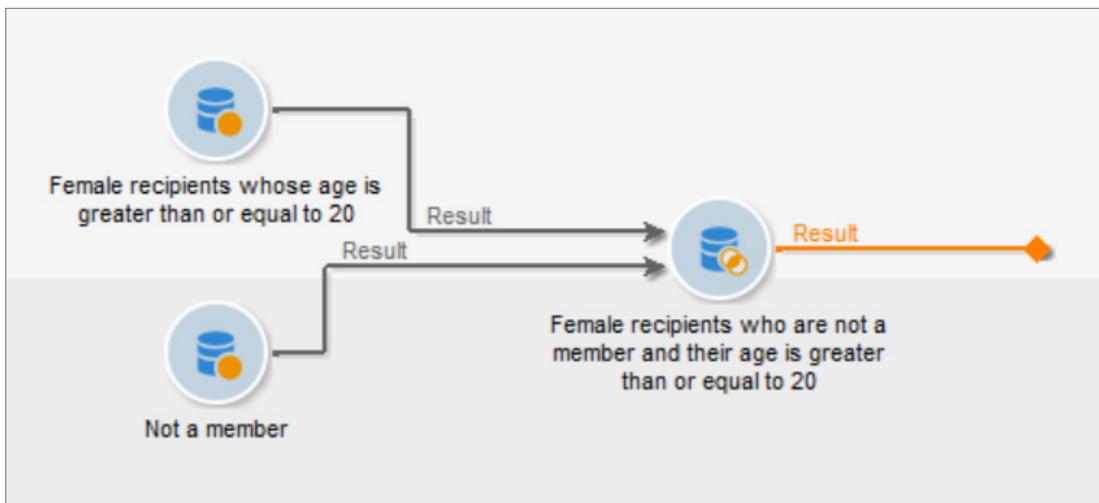


### Task 3: Add an Intersection activity to combine the results of queries

1. Drag an **Intersection** activity onto the workflow.
2. Join the transition lines from both queries to the **Intersection** activity, as shown:

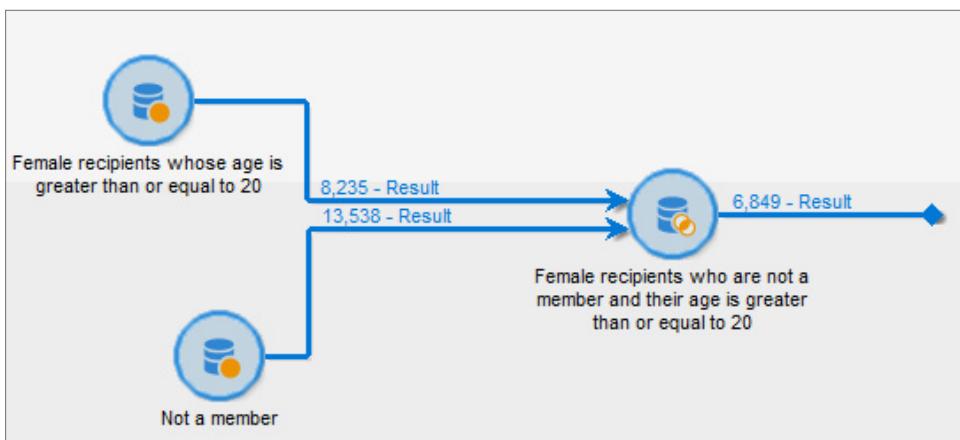


3. Double-click **Intersection** activity. The **Intersection** dialog box opens.
4. In the first **Label** field, type **Female recipients who are not a member and their age is greater than or equal to 20**.
5. Click **Ok**. The workflow is updated, as shown:



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

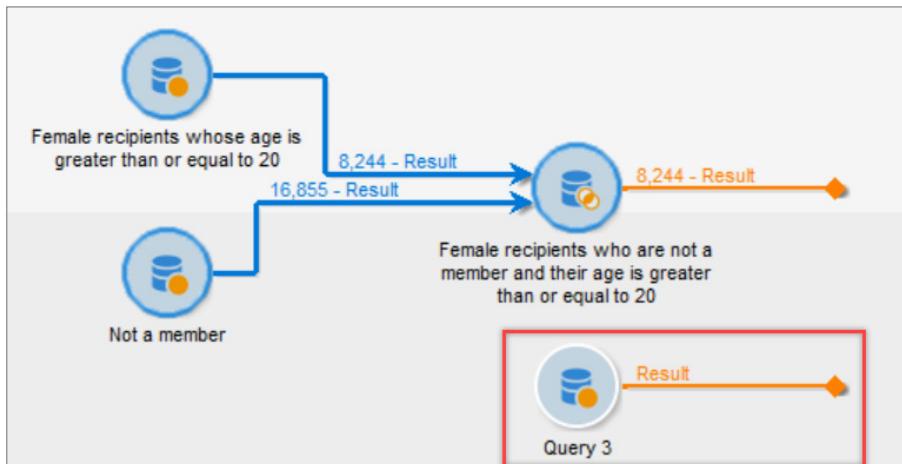
- Click the **Start** icon. The workflow starts and displays the results, as shown:



**Note:** The results may vary from the result shown above.

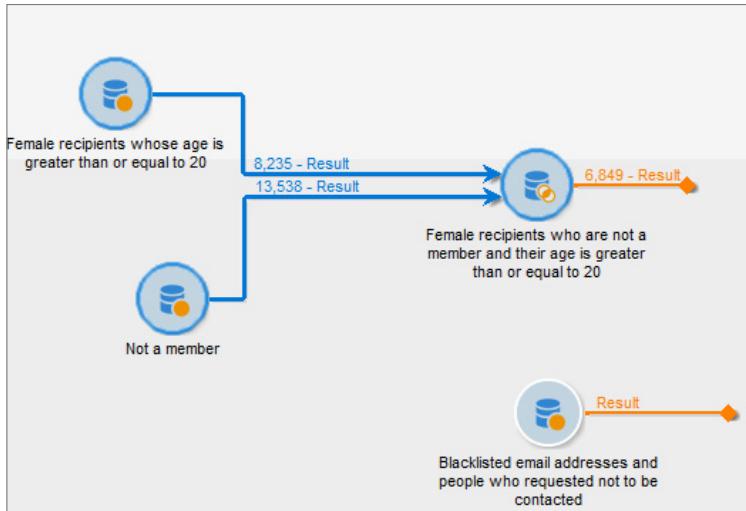
#### Task 4: Add an Exclusion activity to exclude the recipients who do not want to be contacted

- Drag a **Query** activity and place it below the **Intersection** activity, as shown:

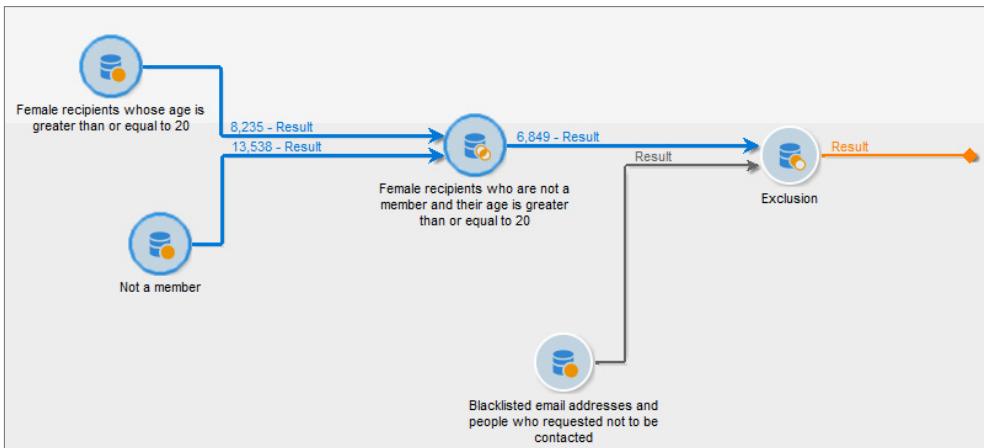


- Double-click the **Query 3** activity. The **Query** dialog box opens.
- In the **Label** field, type **Blacklisted email addresses and people who requested not to be contacted**.
- Click the **Edit query** link. The **Targeting and filtering dimensions** page opens.
- Select **Filtering conditions** and click **Next**.
- Click the **Add** drop-down arrow and select **Predefined filter > Blacklisted email address**.
- Click **Add** to add another field.
- In the new field, click the **Edit expression** icon. The **Select an expression** dialog box opens.

9. Select **No longer contact (by any channel)** and click **Finish**.
10. In the **Operator** field, retain the default **equal to** option.
11. In the **Value** field, click the drop-down arrow and select **Yes**.
12. Click **Finish** to close the **Filter** page.
13. Click **Ok** to close the **Query** dialog box.
14. Click **Save** to save the changes, as shown:

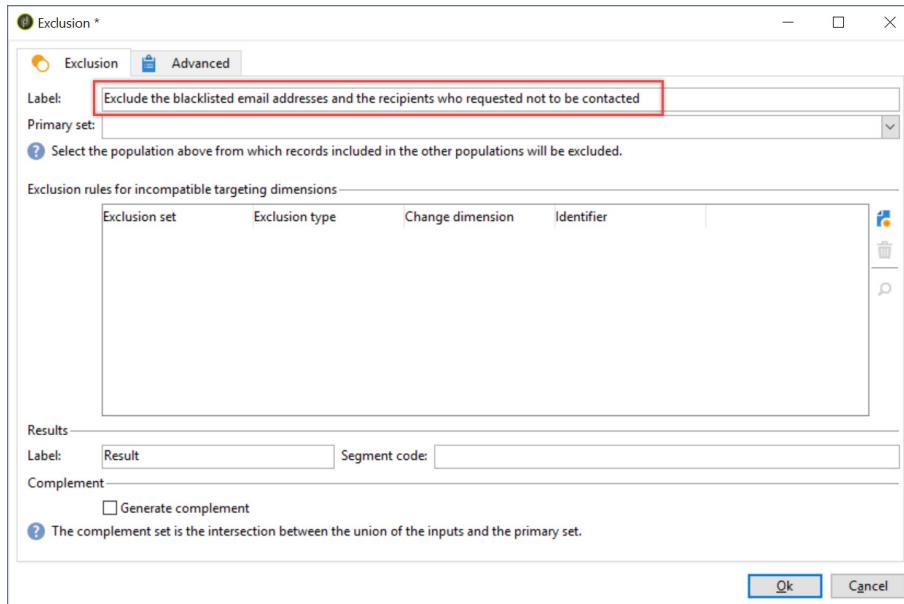


15. Drag an **Exclusion** activity onto the workflow and join it with the transition line from the Intersection activity and the third **Query** activity, as shown:



16. Double-click the **Exclusion** activity. The **Exclusion** dialog box opens.

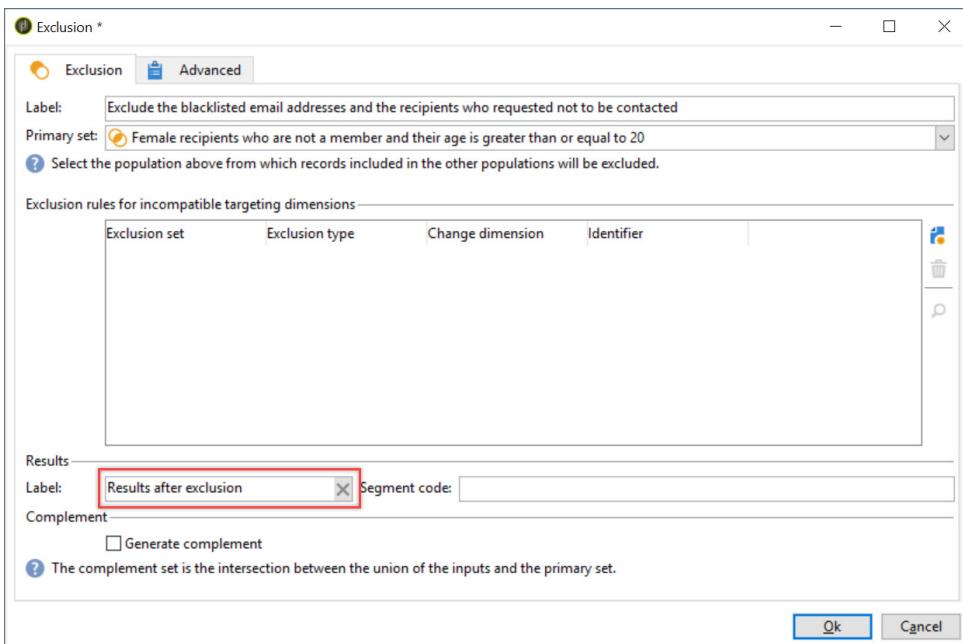
17. In the **Label** field, type **Exclude the blacklisted email addresses and the recipients who requested not to be contacted**, as shown:



18. Click the **Primary set** field and select the **Female recipients who are not a member and their age is greater than or equal to 20** intersection activity from the drop-down list.

 Note: The name will be different based on the information that you typed in the **Label** field in the **Intersection** activity. For example, **Female recipients who are not a member and their age is greater than or equal to 20**.

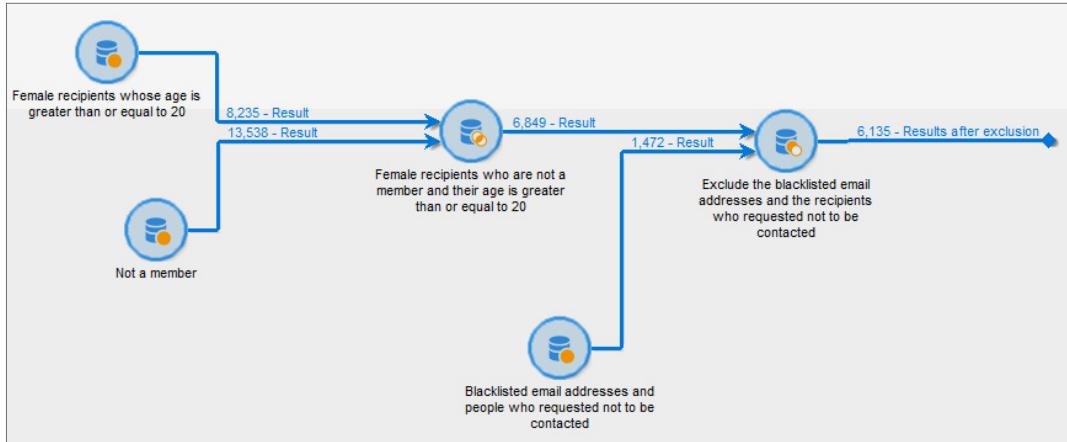
19. In the **Results** section, type **Results after exclusion** in the **Label** field, as shown:



20. Click **Ok** to close the **Exclusion** dialog box and go back to the workflow.

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

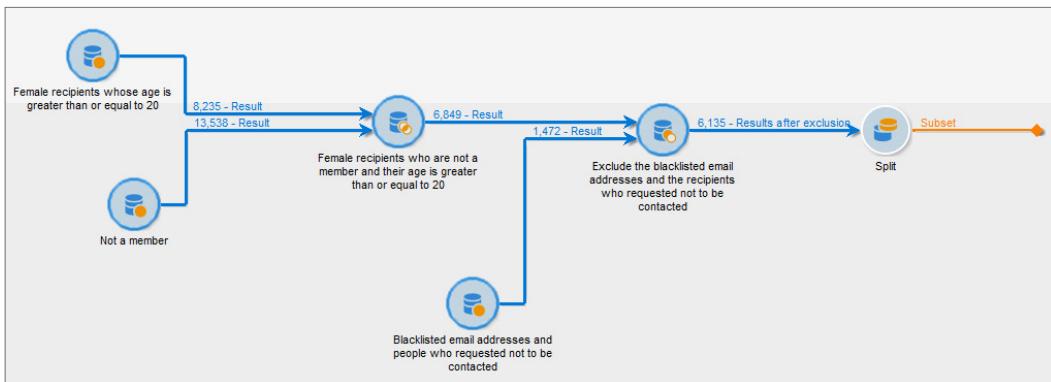
22. Click the **Restart** icon to view the results, as shown:



## Task 5: Add a Split activity to identify the recipients whose email ID, mobile number, and zip code are not empty

1. Drag a **Split** activity onto the workflow.

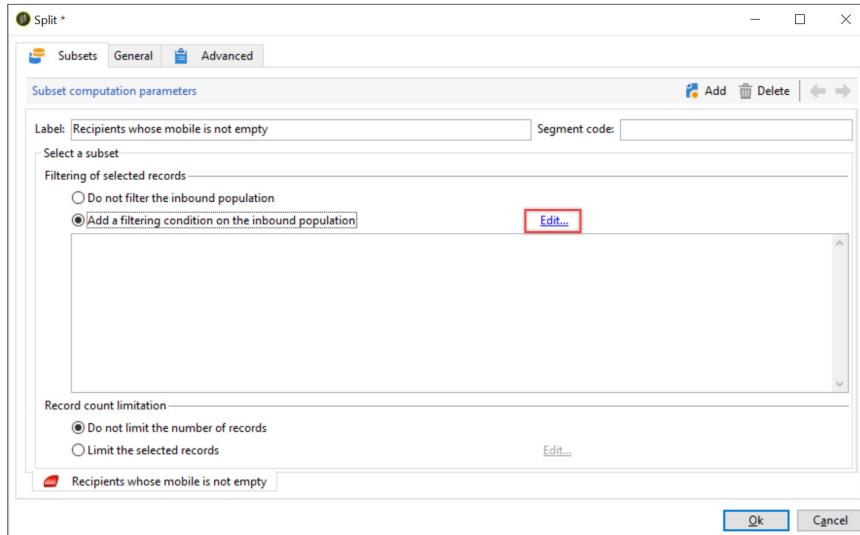
2. Join the transition line from the **Exclusion** activity to the **Split** activity, as shown:



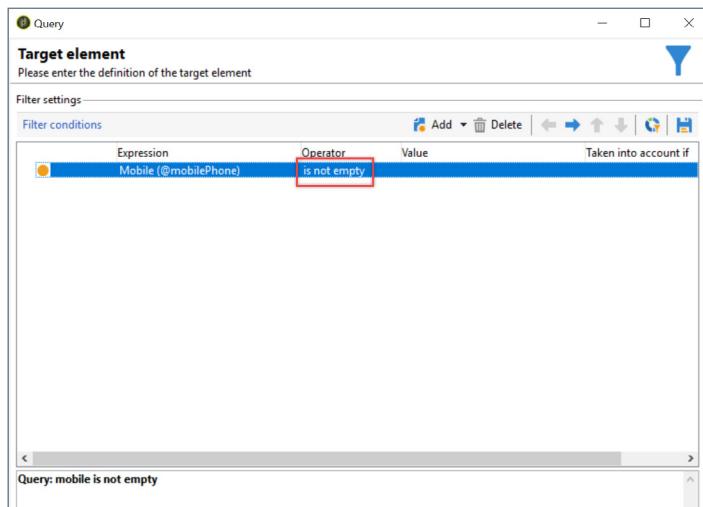
3. Double-click the **Split** activity. The **Split** dialog box opens.

4. In the **Label** field, type **Recipients whose mobile is not empty**.

- In the **Filtering of selected records** section, select the **Add a filtering condition on the inbound population** option. A new text box is displayed.
- Click the **Edit** link, as shown. The **Query** dialog box opens.



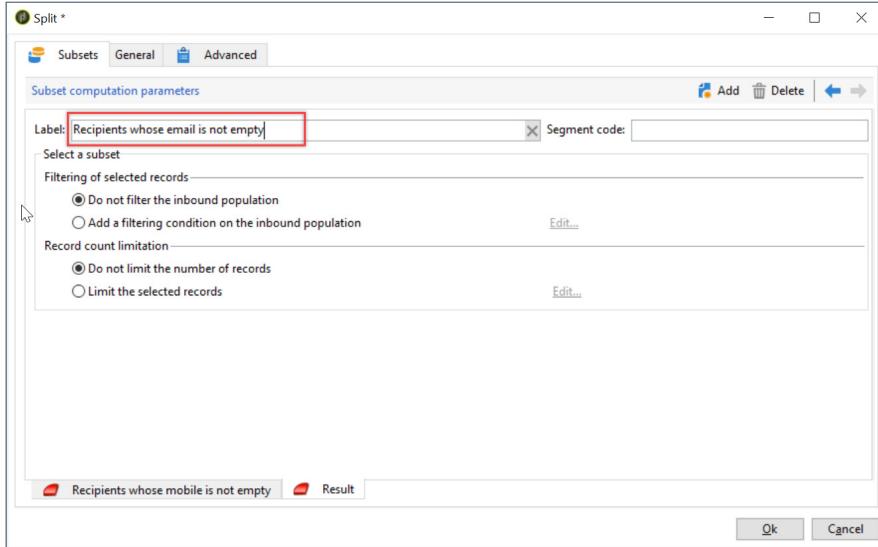
- Select **Filtering conditions** and click **Next**. The **Target element** page opens.
- Click the **Expression** field and select the **Edit expression** icon. The **Select an expression** dialog box opens.
- Select **Mobile** and click **Finish**. The **Expression** field is updated.
- Click the **Operator** field and select **is not empty** from the drop-down list, as shown:



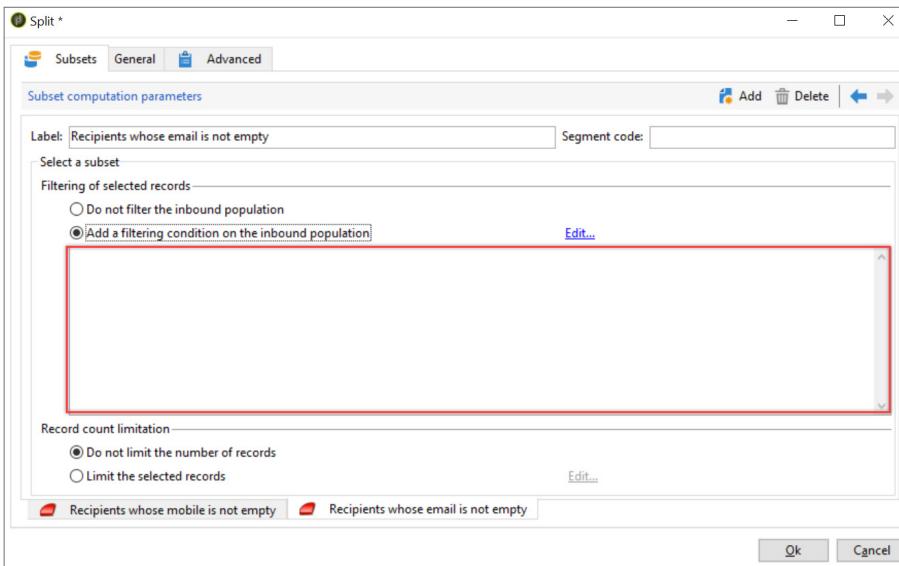
- Click **Finish**. The **Split** dialog box is updated.

12. Click **Add** to add another subset. A new **Result** tab opens at the bottom of the dialog box.

13. In the **Label** field, type **Recipients whose email is not empty**, as shown:



14. In the **Filtering of selected records** section, select the **Add a filtering condition on the inbound population** option. A new text box is displayed, as shown:

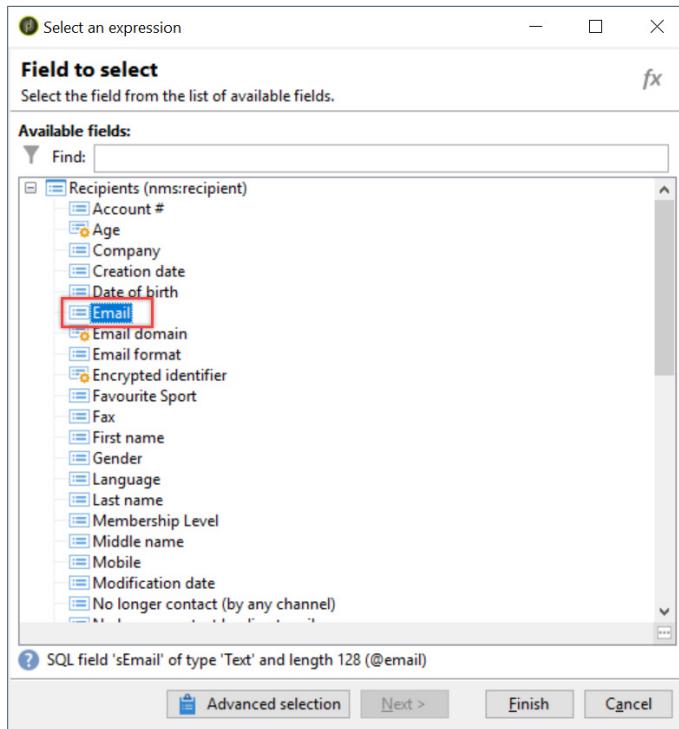


15. Click the **Edit** link. The **Query** dialog box opens.

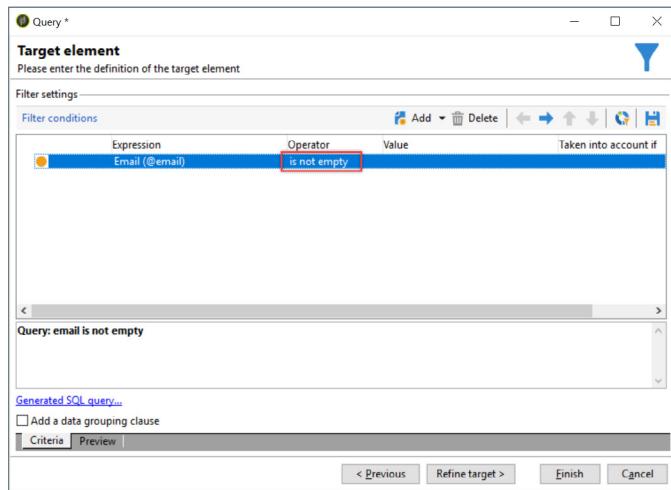
16. Select **Filtering conditions** and click **Next**. The **Target element** page opens.

17. Click the **Expression** field and select the **Edit expression** icon. The **Select an expression** dialog box opens.

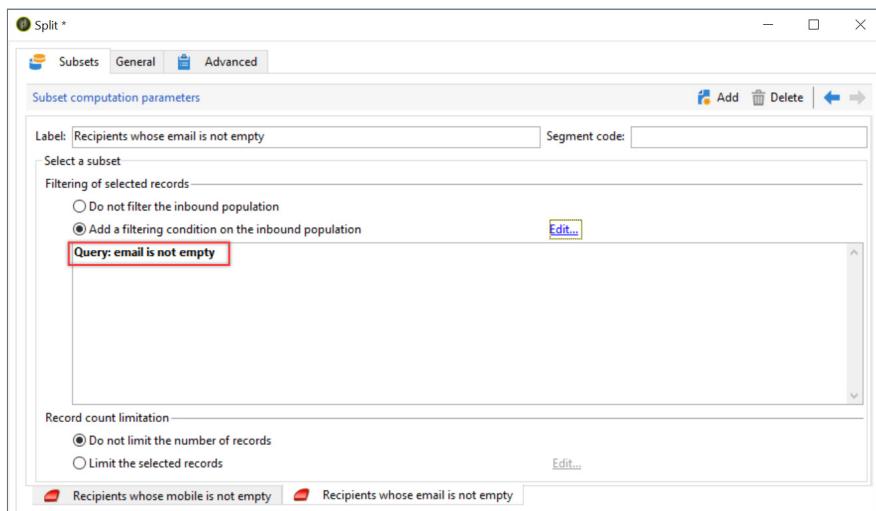
18. Select **Email**, and click **Finish**, as shown. The **Expression** field is updated.



19. Click the **Operator** field and select **is not empty** from the drop-down list, as shown:



20. Click **Finish**. The **Split** dialog box is updated, as shown:



21. Click **Add** to add another subset. A new **Result** tab opens at the bottom of the dialog box.

22. In the **Label** field, type **Recipients whose zipcode is not empty**.

23. In the **Filtering of selected records** section, select the **Add a filtering condition on the inbound population** option. A new text box is displayed.

24. Click **Edit link**. The **Query** dialog box opens.

25. Select **Filtering conditions** and click **Next**. The **Target element** page opens.

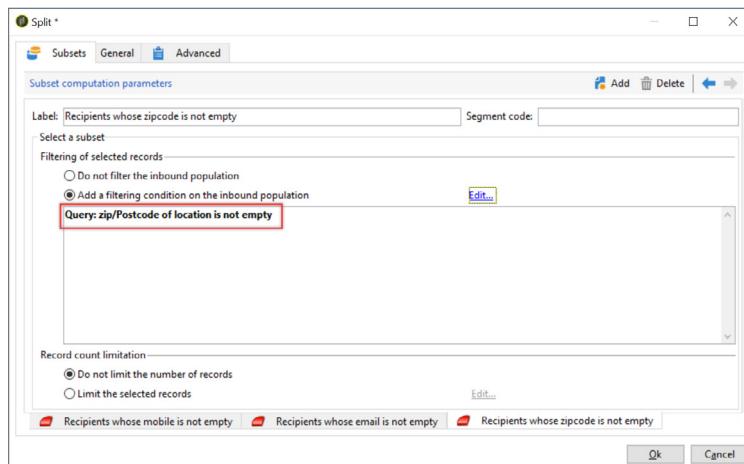
26. Click the **Expression** field and select the **Edit expression** icon. The **Select an expression** dialog box opens.

27. Expand **Location** and select **Zip/Postcode**.

28. Click **Finish**. The **Expression** field is updated.

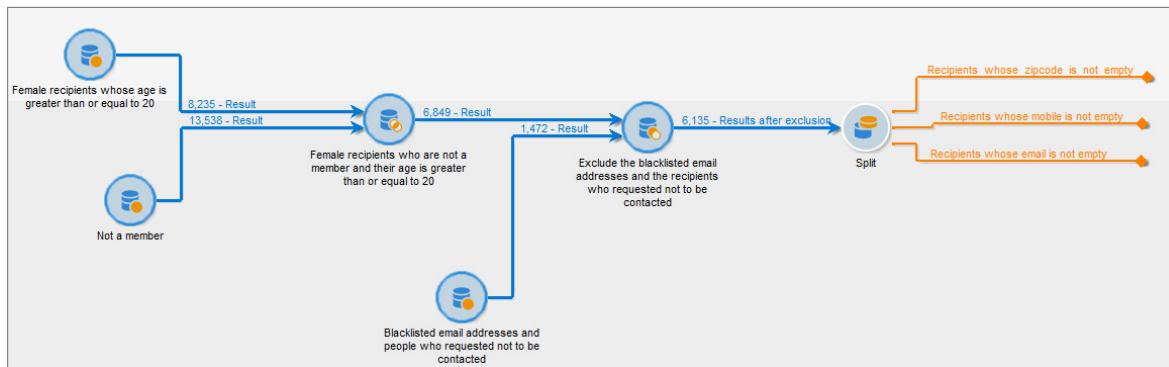
29. Click the **Operator** field and select **is not empty** from the drop-down list.

30. Click **Finish**. The **Split** dialog box is updated, as shown:

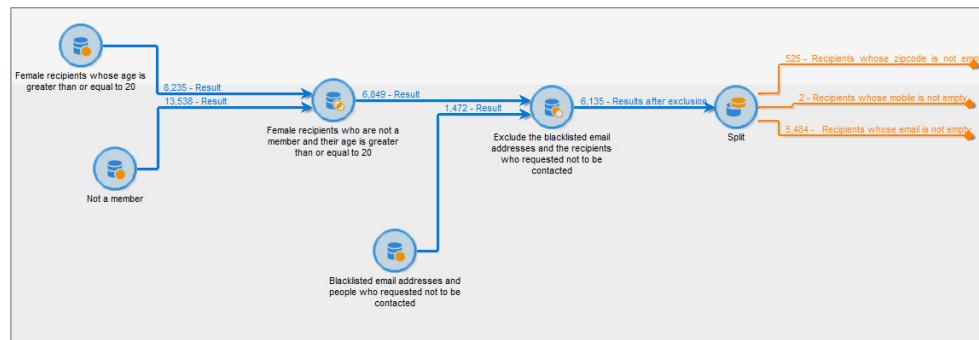


31. Click **Ok** to close the **Split** dialog box.

32. Click **Save** to save the workflow. You can arrange the transition lines based on your interest, as shown:



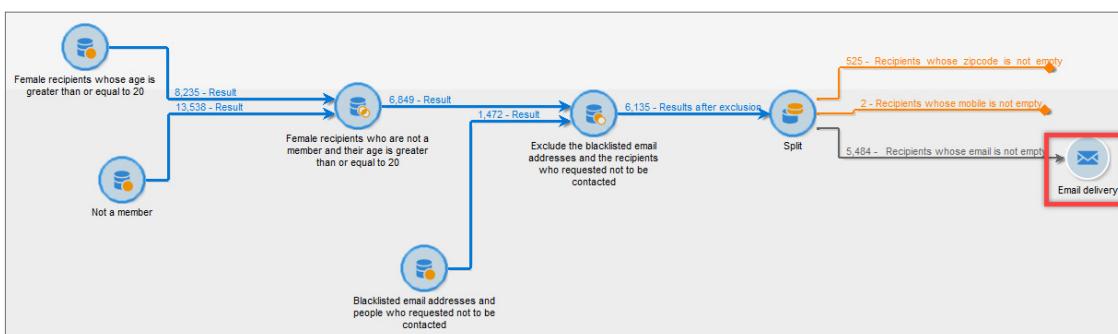
33. Click the **Start** icon to generate the results, as shown:



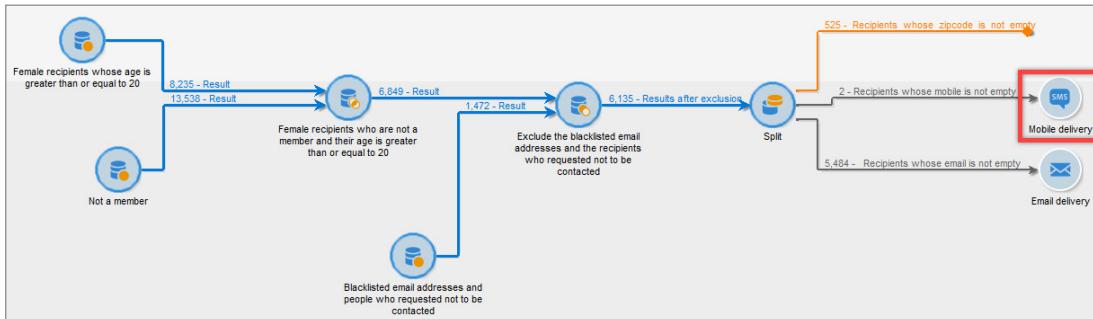
**Note:** The results may vary from the result shown above based on the profiles with mobile numbers and email ID's. Participants may need to create their own profiles with fake mobile numbers in order to retrieve the required results for this task.

## Task 6: Configure email delivery, mobile delivery, and direct mail delivery

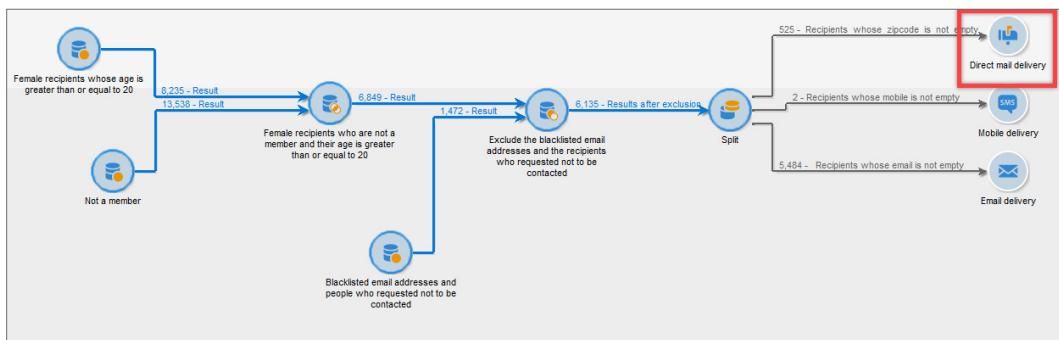
1. Drag an **Email delivery** from the **Deliveries** palette onto the workflow and join it with the **Recipients whose email is not empty** transition line, as shown:



2. Drag a **Mobile delivery** from the **Deliveries** palette onto the workflow and join it with the **Recipients whose mobile is not empty** transition line, as shown:



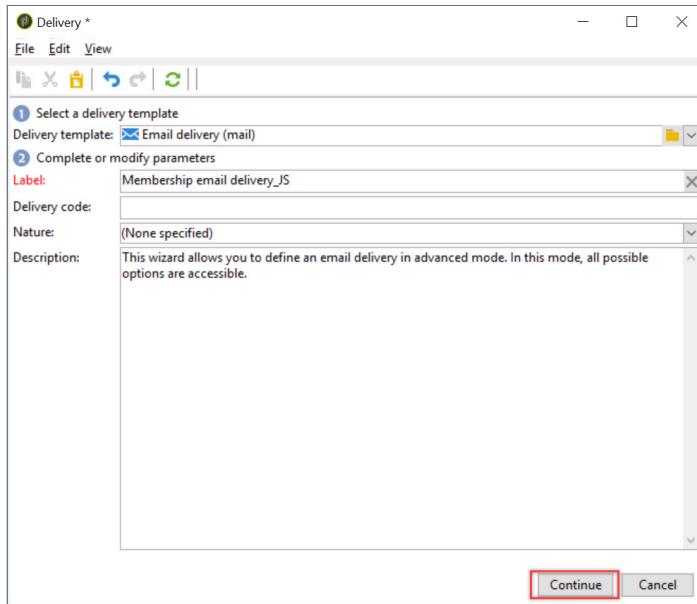
3. Drag a **Direct mail delivery** from the **Deliveries** palette onto the workflow and join it with the **Recipients whose zipcode is not empty** transition line, as shown:



To configure the Email delivery:

4. Double-click the **Email delivery**. The **Delivery** dialog box opens.
5. In the **Delivery template** field, keep the default delivery template.
6. In the **Label** field, type **Membership email delivery\_<your initials>**. For example, type **Membership email delivery\_JS**.

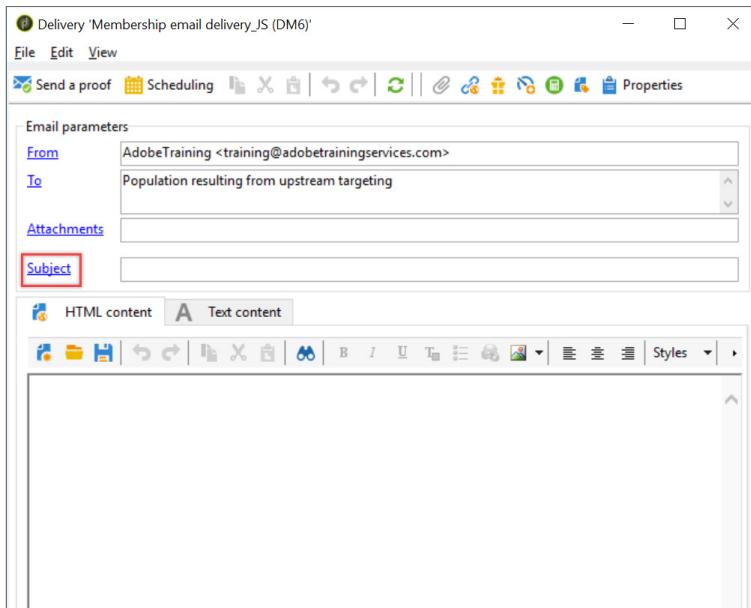
7. Click **Continue**, as shown. The page to edit the email content opens.



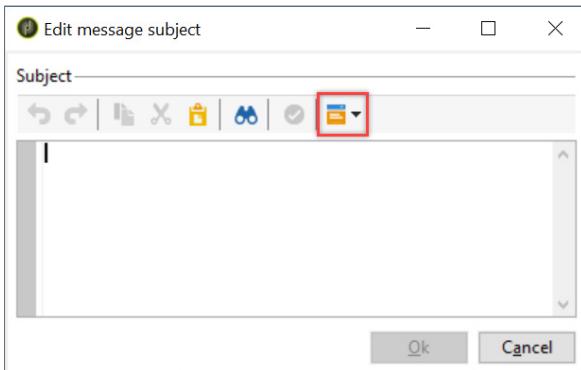
8. Click **Save** to save the email delivery.  
 9. Click **Save** to save the workflow.  
 10. Click the **Dashboard** tab. The available deliveries are displayed in the **Delivery** section, as shown:

11. Click **Open** to edit the email delivery.

12. Click the **Subject** link, as shown. The **Edit message subject** dialog box opens.

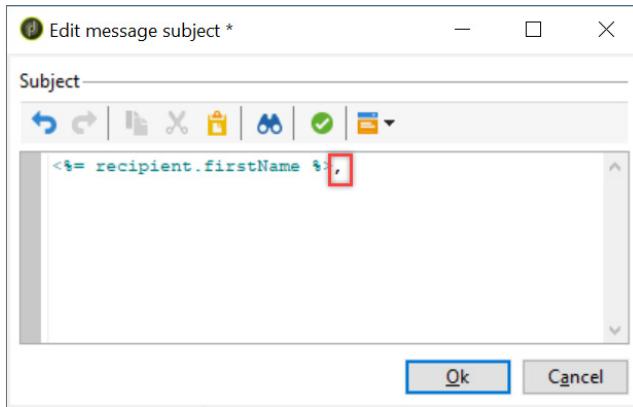


13. Click the **Insert content** icon, as shown, to add personalized content to the subject line.



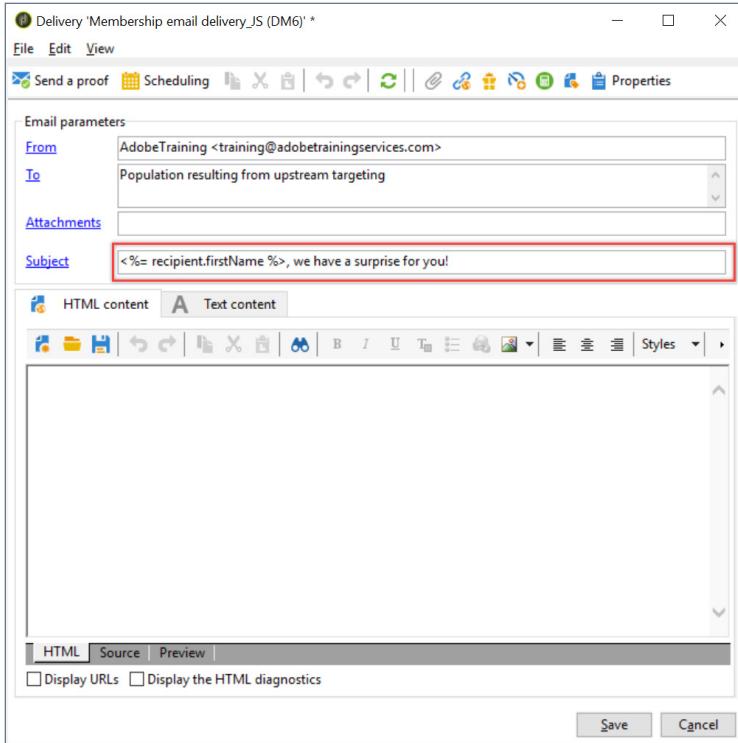
14. Select **Recipients > First name**. The content is added to the box.

15. Place the cursor after the content and add a comma, as shown:

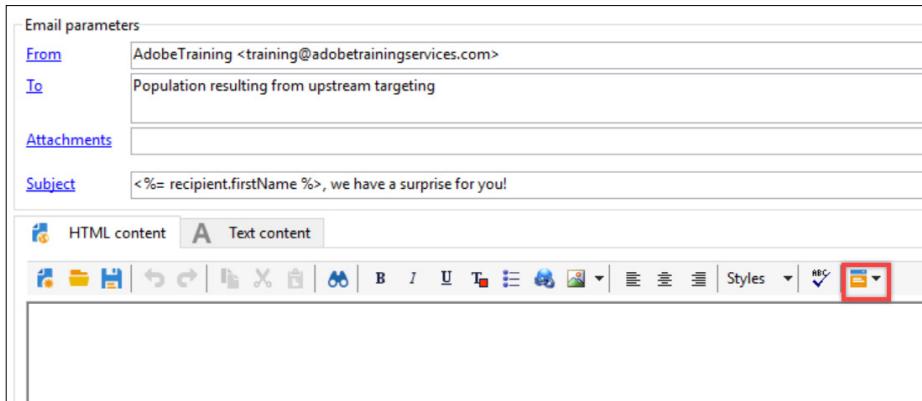


16. Add a space after the comma and type **we have a surprise for you!**

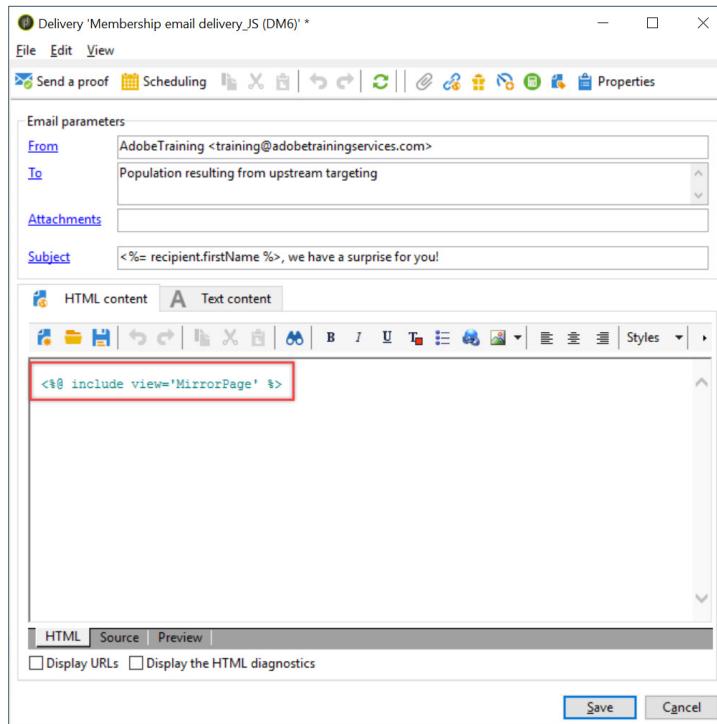
17. Click **Ok** to add the content to the **Subject** field of the **Delivery** dialog box, as shown:



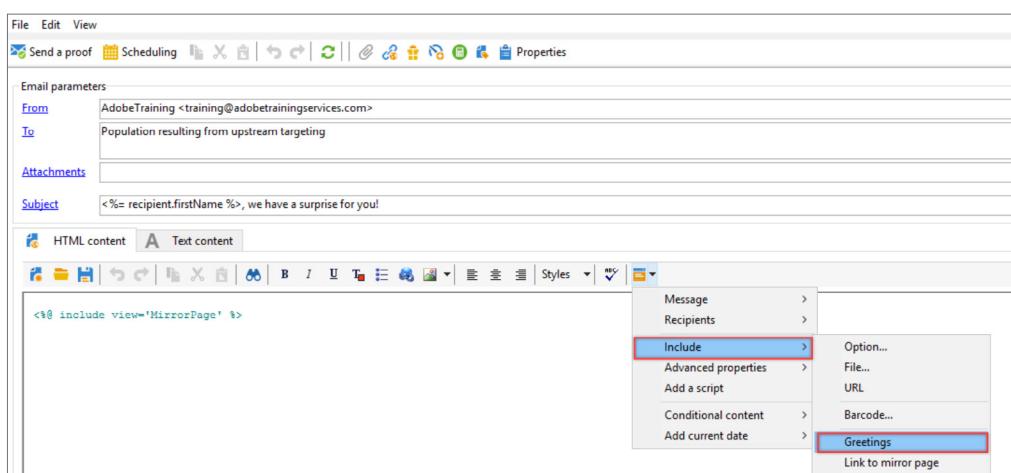
18. In the **HTML content** section, click the **Insert content** drop-down arrow, as shown:



19. Select **Include > Link to mirror image**. The link is added to the mail body in the **HTML content** section, as shown:

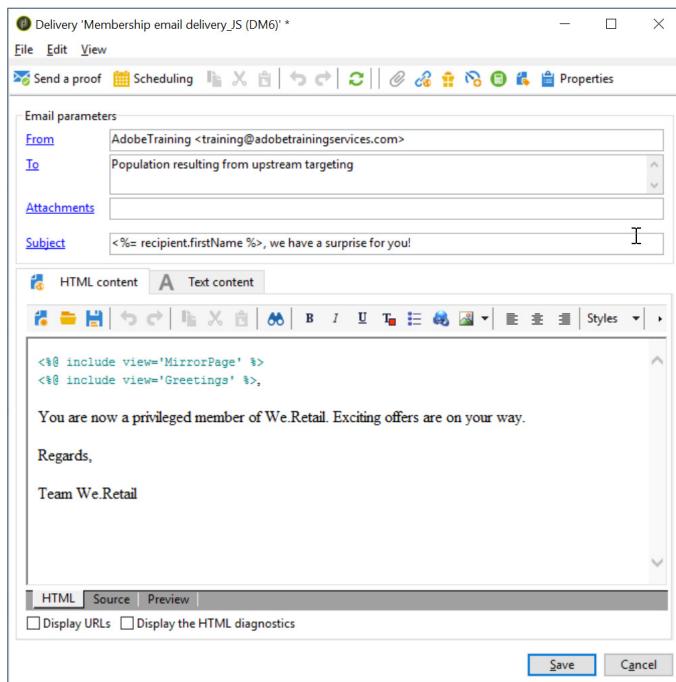


20. Place the cursor at the end of the line containing the link to the mirror page and press the Shift+Enter keys.
21. Insert another personalization field to include greetings. Inside the **HTML content** section, click the **Insert content** drop-down arrow.
22. Select **Include > Greetings**, as shown. The content is added to the **HTML content** section.



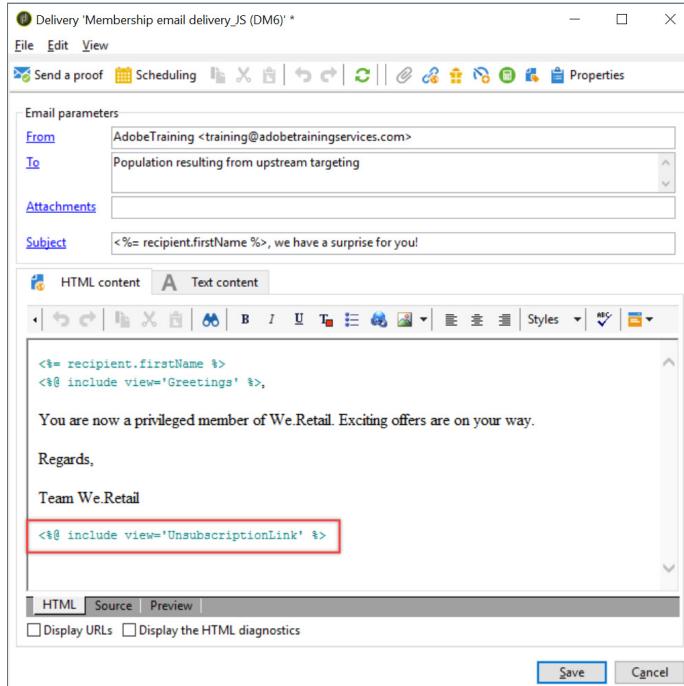
23. Place the cursor at the end of the line containing the greetings and add a comma.
24. Place the cursor at the end of comma and press the Enter key.

25. Enter the message body of your choice. For example, type and format **You are now a privileged member of We.Retail. Exciting offers are on your way. Regards, Team We.Retail**, as shown:



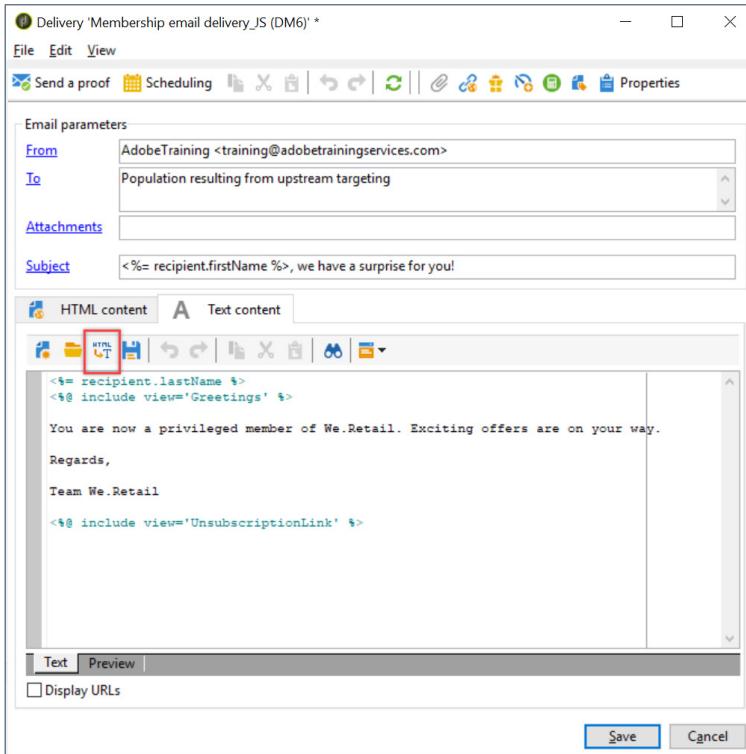
26. Place the cursor at the end of **Team We.Retail** and press the **Enter** key.

27. Click the **Insert** content drop-down arrow and select **Include > Unsubscription link**. Notice how the unsubscribe link is added to the email body, as shown:



28. Click the **Text content** tab to view the text version of the mail.

29. Click the **Import HTML** icon, as shown. The text content is generated.



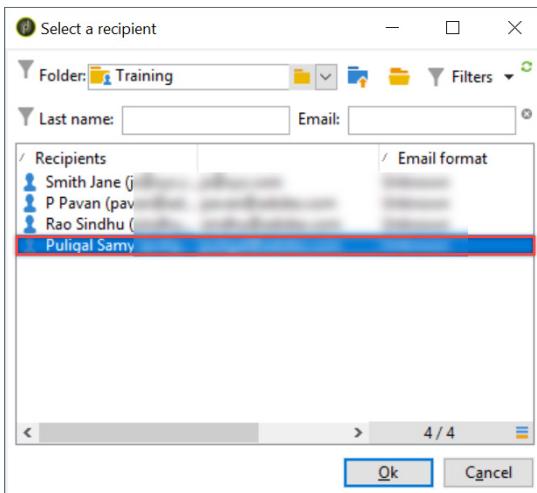
**Note:** If you do not see the **Import HTML** icon, save the template and open it again.

30. Click the **HTML content** tab and then **Preview** to preview the HTML version of the message body.

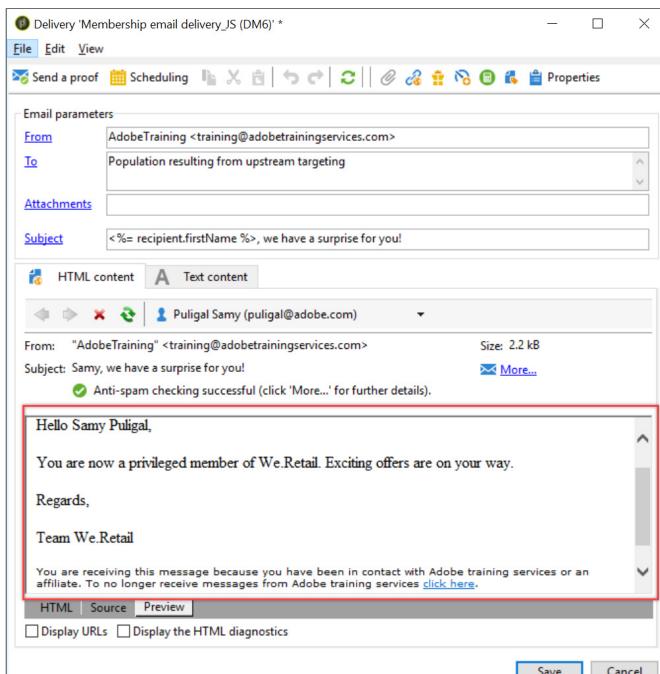
31. Click **Test personalization > Recipient**. The **Select a recipient** dialog box opens.

32. In the **Folder** field, click the drop-down arrow and select **Recipients > Training**.

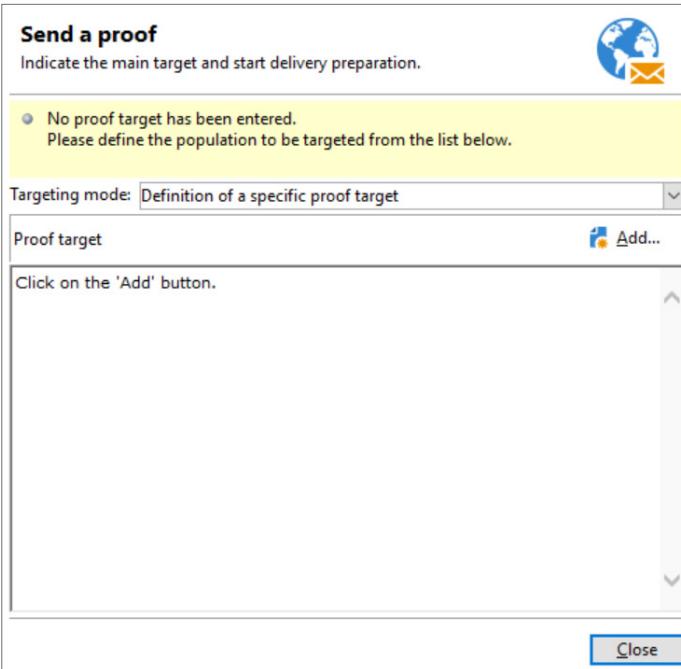
33. Select any recipient from the list of recipients, as shown, and then click **Ok**.



34. Verify the preview displays the name of the recipient you selected, as shown:



35. Click **Send a proof** on the toolbar to send a proof of the delivery. The **Send a proof** dialog box opens, as shown:

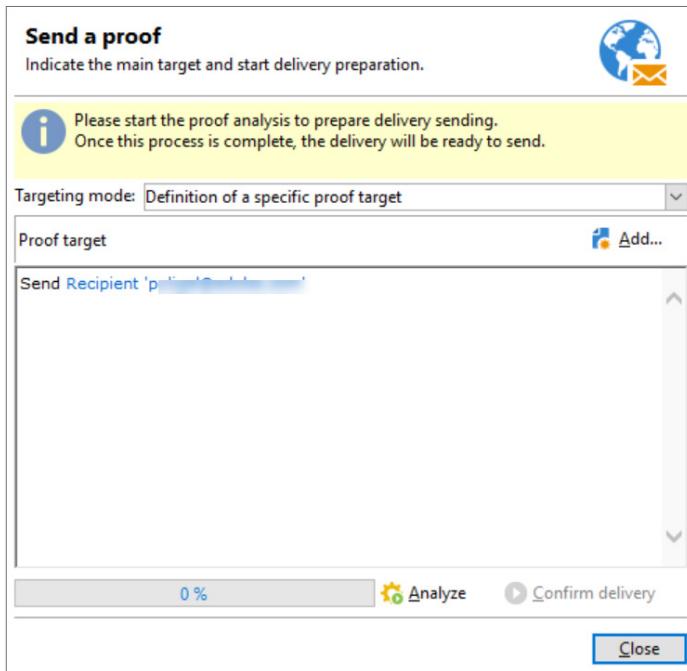


36. Click **Add** to add a proof target. The **Select target element** dialog box opens.

37. Select **A recipient** and then click **Next**. The **Target element** page opens.

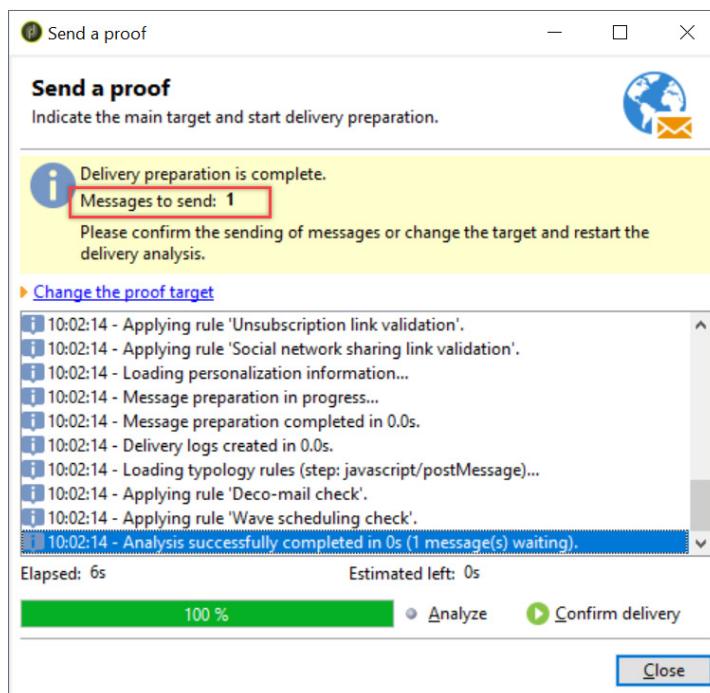
38. In the **Folder** field, click the drop-down arrow and select **Recipients > Training**. Click **Ok**.

39. Select your name from the list of recipients and then click **Finish**. The profile is added to the **Send a proof** dialog box, as shown:

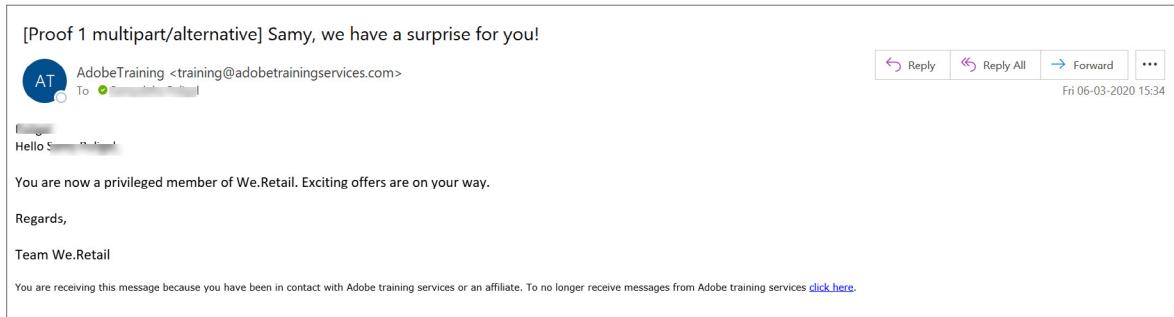


**Note:** Ensure that you created your profile in the **Explorer > Profiles and targets > Recipient > Training** folder to view your profile data in the **Training** folder.

40. Click **Analyze** and wait until the dialog box displays **Message to send: 1** and the progress bar is completely green, labeled **100%**, as shown:



41. Click **Confirm delivery** to send the proof delivery. A confirmation window opens.
42. Click **Yes**. The delivery starts and the **Send a proof** dialog box indicates you can close the dialog box.
43. Click **Close** to close the **Send a proof** dialog box. You will receive an email in your inbox, as shown:



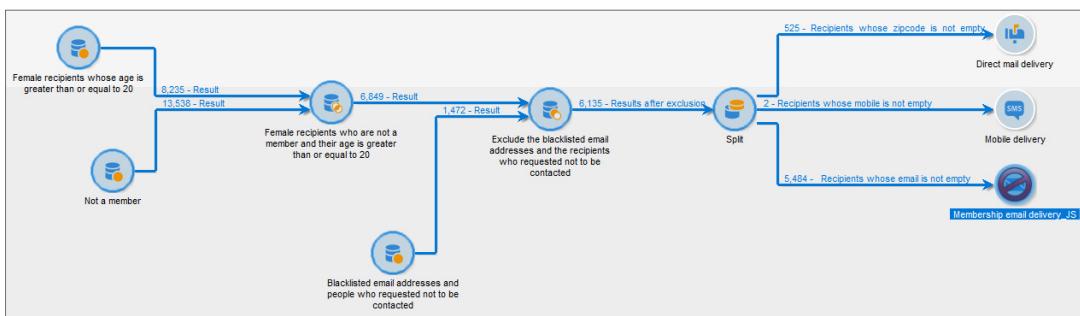
**Note:** The interface of the mail may vary based on the mail account of your email ID.

44. Go back to the client console and click **Close** to close the **Delivery** dialog box. If you have made any changes to the content, you need to click **Save**.
45. Click the **Targeting and workflows** tab to go back to the workflow.
46. Right-click the **Membership email delivery\_<your initials>** and select **Do not enable**.



**Note:** Selecting **Do not enable** provides a safety net to avoid processing a delivery if you accidentally click the **Start** button. You can enable the Email delivery when you want to start the workflow to send the deliveries.

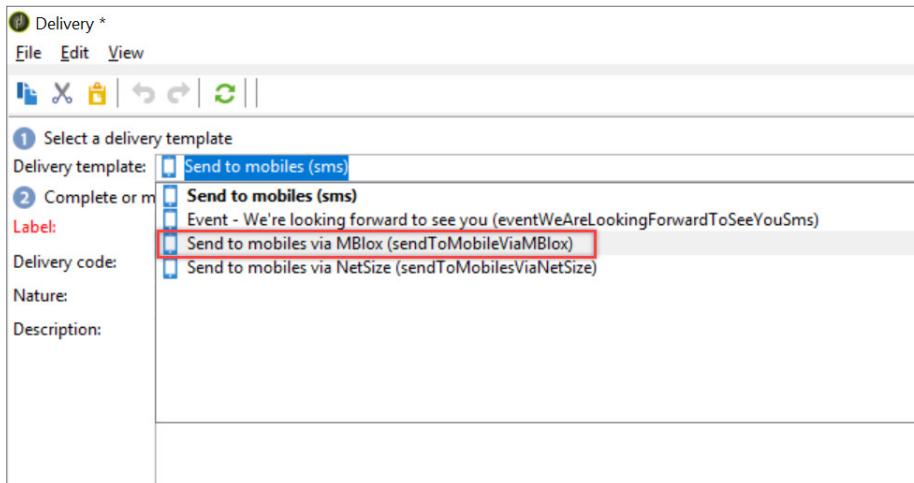
47. Click **Save** to save the workflow, as shown:



To configure the Mobile delivery:

48. Double-click **Mobile delivery**. The **Delivery** dialog box opens.

49. In the **Delivery template** field, click the drop-down arrow and select **Send to mobiles via MBlox (sendToMobileViaMBlox)**, as shown:



50. In the **Label** field, type **Membership mobile delivery\_<your initials>**. For example, type **Membership mobile delivery\_JS**.

51. Click **Continue** to create view the content for the Mobile delivery. The **Text content** tab is open by default.

52. Click **Save** to save the delivery.

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

54. Click the **Dashboard** tab. The available deliveries are displayed.

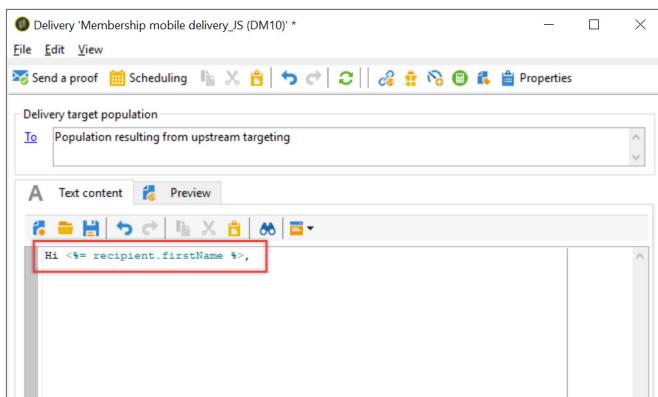
55. Click **Membership mobile delivery\_<your initials>** and click **Open** to edit the mobile delivery. The Delivery dialog box opens.

56. Delete the **From <%= recipient.currentOperator.label %>** content.

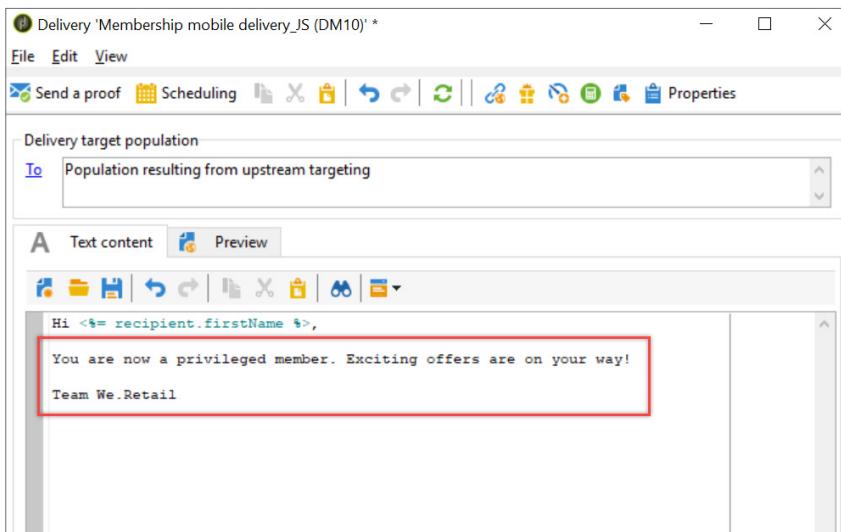
57. Type **Hi** and enter a space, and then click the **Insert content** icon.

58. Select **Recipients > First name**. The personalization is added to the content.

59. Type a comma after the personalization, as shown:



60. Press the **Enter** key and type a message for the recipient. For example, type and format **You are now a privileged member. Exciting offers are on your way! Team We.Retail**, as shown:

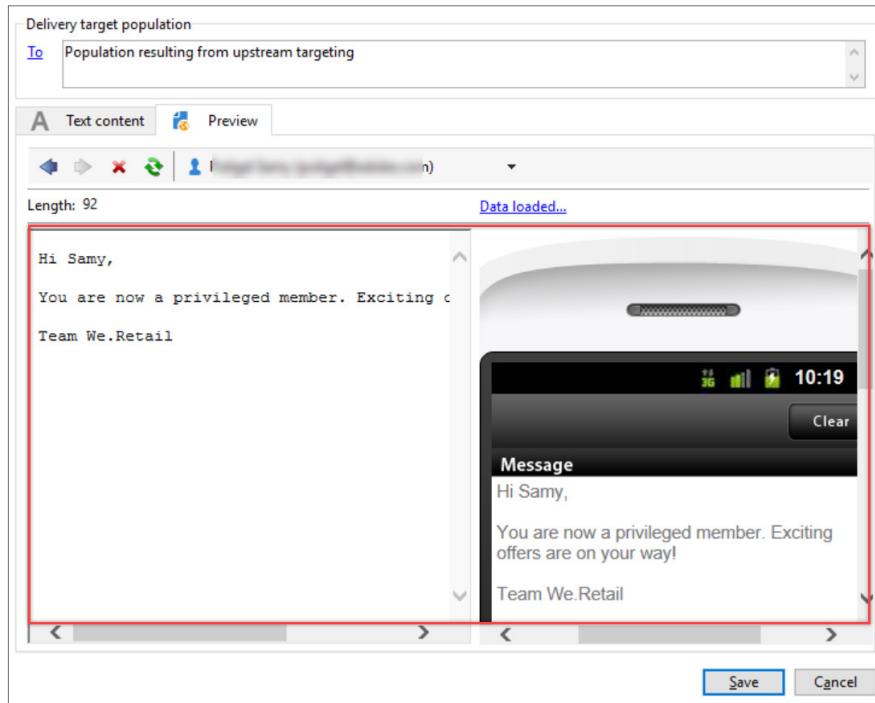


61. Click the **Preview** tab to preview the message. Remember, you will not see actual content on the **Preview** tab until you perform test personalization.

62. Click the **Test personalization** drop-down arrow and then select **Recipient**. The **Select a recipient** dialog box opens.

63. In the **Folder** field, click the drop-down arrow and select **Recipients > Training** (if not already selected).

64. Select any recipient from the list of recipients, as shown, and then click **Ok**. The preview is generated, as shown:



**🏆 Best Practice:** It is recommended that you check the length of the message. You can view the length of the message in the left side of the **Preview** tab. If the length of the message is more than 160 characters, click **Properties** at the top of the **Delivery** dialog box and then click the **Delivery** tab on the **Delivery properties** dialog box. In the **SMS parameters** section, notice the **Maximum number of SMSes per message** field. This field allows you to set the number of SMS to send one message. If the length of the message exceeds the standard limit, you can change the value in the field.

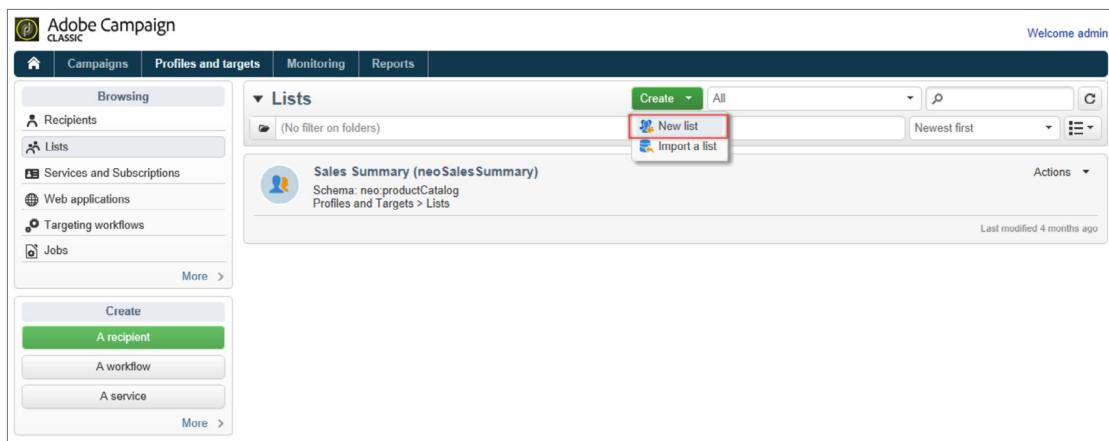
65. Click **Save** to save the changes and close the **Delivery** dialog box.

66. Create a list of reviewers to proof the Mobile delivery. To do so, click **Home** to go to the **Home** page. Do not close the campaign tab you were working on.

67. Click **Profiles and targets**. The available options are displayed.

68. In the left navigation pane, click **Lists**.

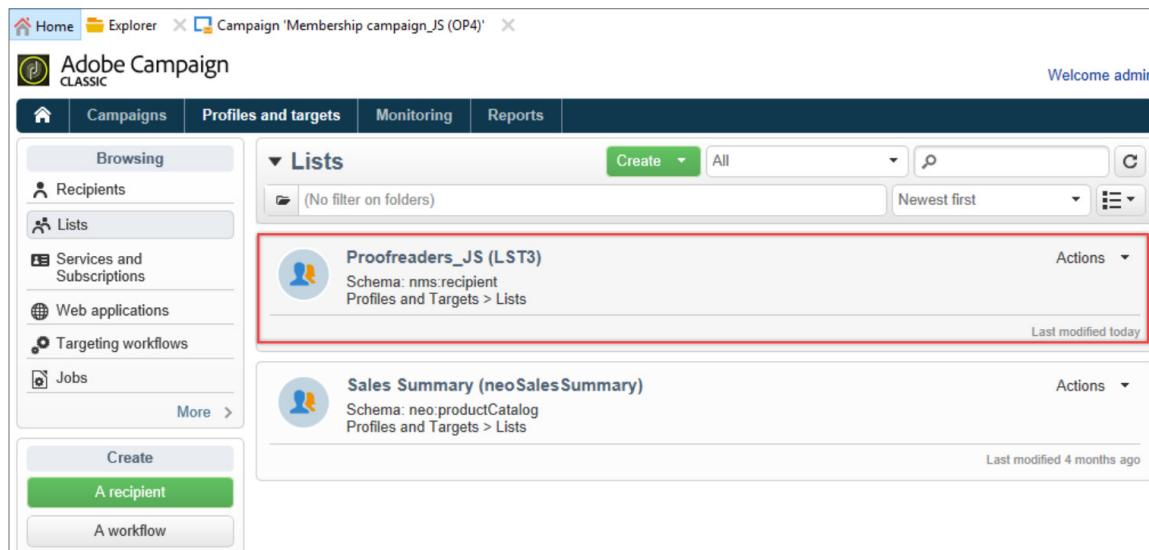
69. At the top of the **Lists** page, click **Create > New list**, as shown. The List dialog box opens.



The screenshot shows the Adobe Campaign interface with the 'Profiles and targets' tab selected. In the main content area, there is a 'Lists' section. At the top right of this section, there is a 'Create' button with a dropdown arrow. A red box highlights the 'New list' option under the 'Create' button. Below this, there is a link 'Import a list'.

70. In the **Label** field, type **Proofreaders\_<your initials>**. For example, type **Proofreaders\_JS**.

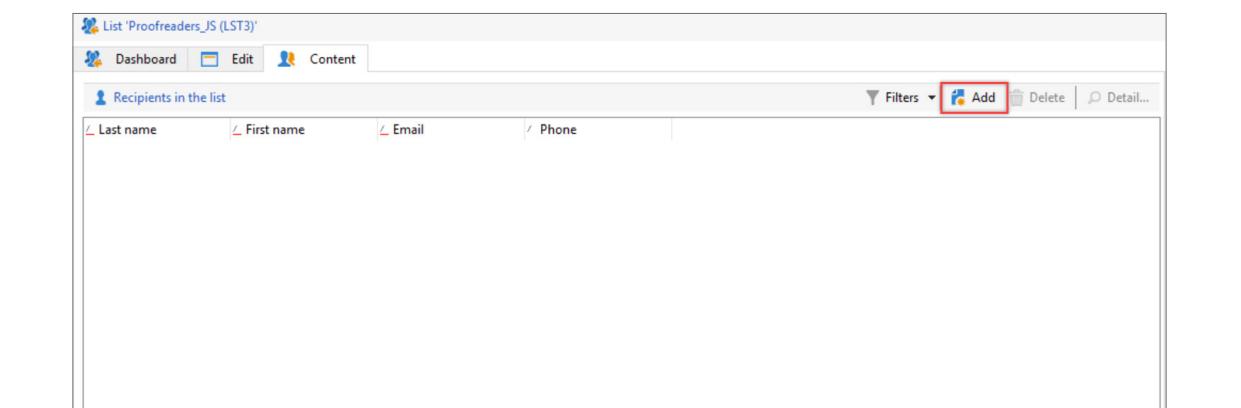
71. Click **Save**. The list is created, as shown:



The screenshot shows the Adobe Campaign interface with the 'Profiles and targets' tab selected. In the main content area, there is a 'Lists' section. A list item named 'Proofreaders\_JS (LST3)' is visible, with its entire row highlighted by a red box. To the right of the list item, there is an 'Actions' button. Below this, another list item 'Sales Summary (neoSalesSummary)' is shown, with its last modified date listed as 'Last modified 4 months ago'.

72. Click the title of the list you just created, which is a hyperlink to open it in a separate tab.

73. Click the **Content** tab, and click **Add**, as shown. The **Add recipients to the list** folder opens.

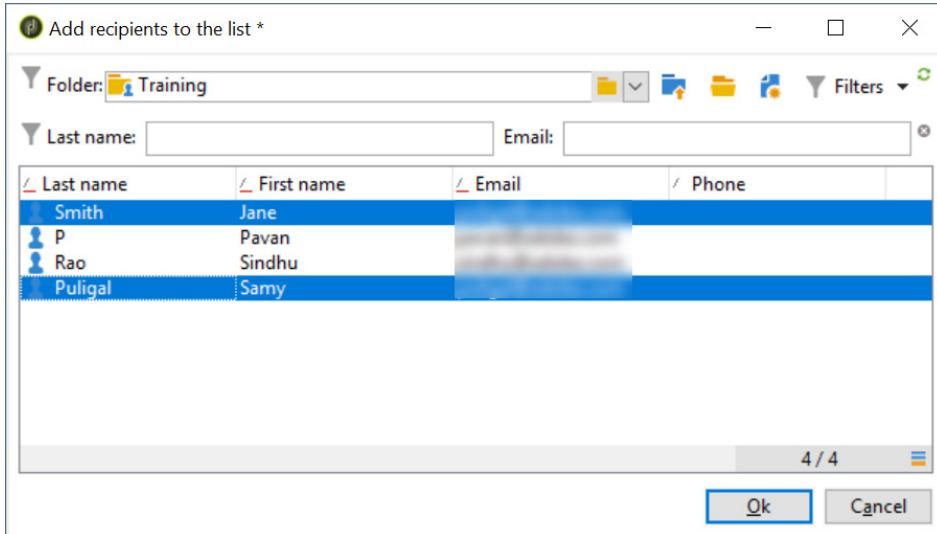


The screenshot shows a detailed view of the 'Proofreaders\_JS (LST3)' list. At the top, there is a navigation bar with tabs for 'Dashboard', 'Edit', and 'Content'. The 'Content' tab is selected. Below this, there is a table titled 'Recipients in the list' with columns for 'Last name', 'First name', 'Email', and 'Phone'. At the bottom right of the table, there is a toolbar with buttons for 'Filters', 'Add' (which is highlighted with a red box), 'Delete', and 'Detail...'. The 'Add' button has a blue icon of a person with a plus sign.

74. Click the **Folder** drop-down arrow and select **Profiles and Targets > Recipients > Training**.

75. Select your profile.

76. Press the **Ctrl** key and select another profile, and then click **Ok**, as shown:

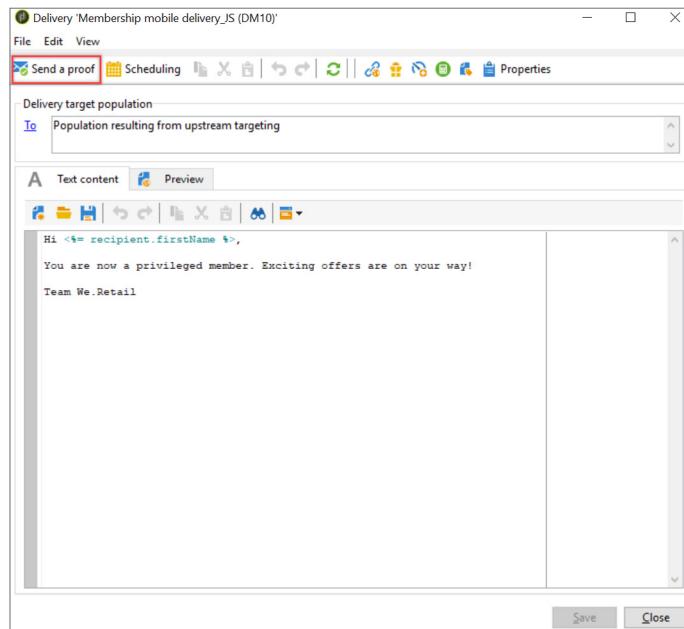


77. Click the **Campaign** tab to open the workflow that you created.

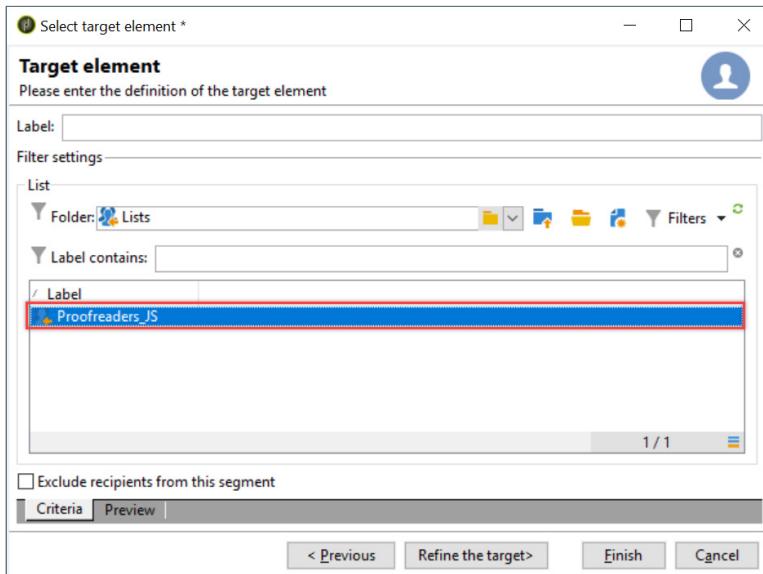
78. On the **Dashboard** tab, click the **Membership mobile delivery\_<your initials>** activity to expand it.

79. Click **Open**. The Delivery dialog box opens.

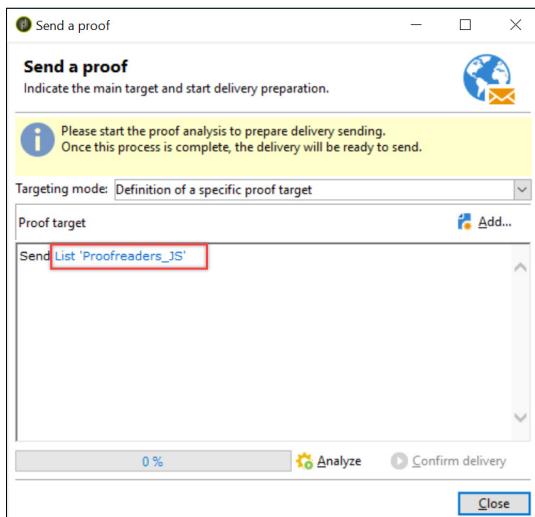
80. Click **Send a proof**, as shown. The **Send a proof** dialog box opens.



81. Click **Add** in the **Proof target** section. The **Select target element** dialog box opens.
82. Select **A list of recipients** and click **Next**. The **Target element** page opens.
83. In the **List** section, select the list you created in this exercise. For example, select **Proofreaders\_JS**, as shown:



84. Click **Finish**. The list is added to the **Send a proof** dialog box, as shown:

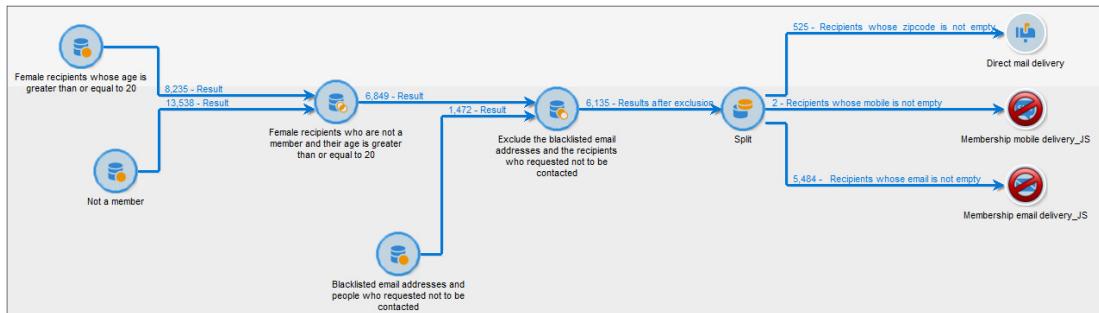


85. Click **Analyze** and wait until the dialog box displays **Messages to send: X**. Here, X refers to the number of recipients you have added in the list of proofreaders.
86. Wait until the progress bar is completely green, labeled **100%**.
87. Click **Confirm delivery**. A prompt is displayed.
88. Click **Yes**. The delivery starts and the **Send a proof** dialog box indicates you can close the dialog box.
89. Once the Send a proof window indicates, "The delivery has started. You may close the window". click **Close**. You and the other recipient in the list you created will receive an SMS to the registered mobile number.
90. Click **Close** (or click X in the upper right) to close the **Delivery** dialog box. If you have made any changes to the content, you need to click **Save** to save the changes.
91. Click the **Targeting and workflows** tab to go back to the workflow.
- 
92. Right-click the **Membership mobile delivery\_<your initials>** and select **Do not enable**.

 **Note:** Selecting **Do not enable** provides a safety net to avoid processing a delivery if you accidentally click the **Start** button. You can enable the Mobile delivery when you want to start the workflow to send the deliveries.

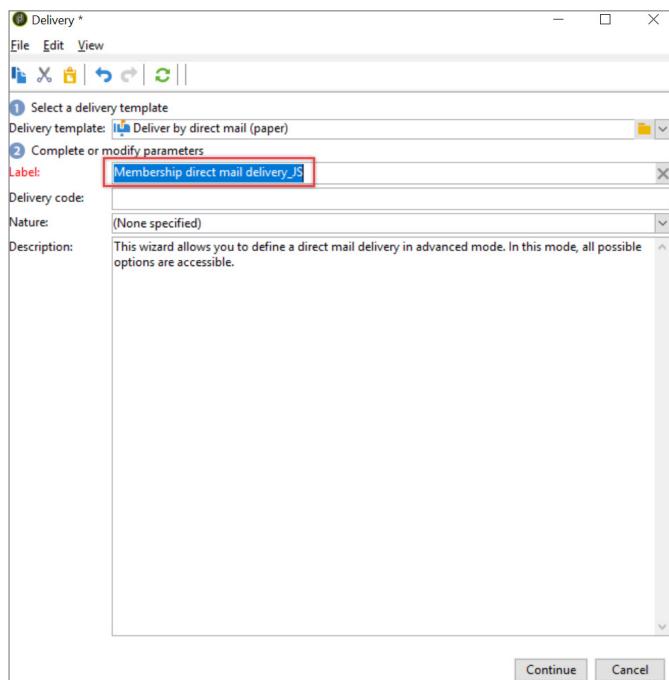
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93. Click **Save** to save the workflow, as shown:



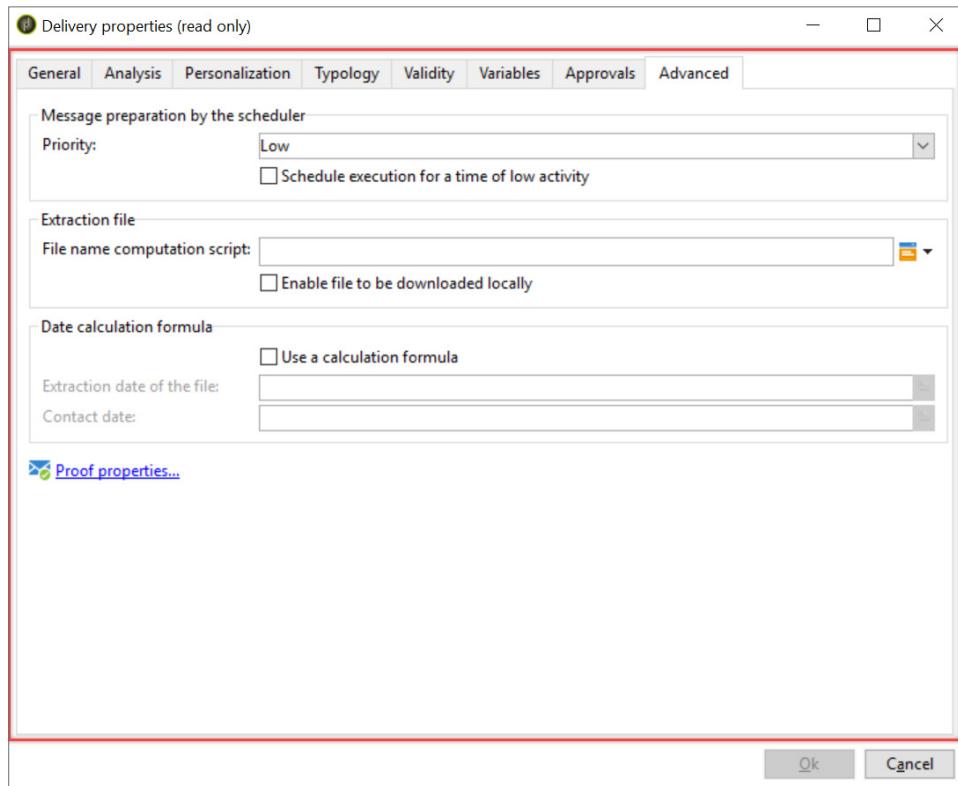
To configure the Direct mail delivery:

94. Double-click **Direct mail delivery**. The **Delivery** dialog box opens.
95. In the **Label** field, type **Membership direct mail delivery\_<your initials>**. For example, type **Membership direct mail delivery\_JS**, as shown:



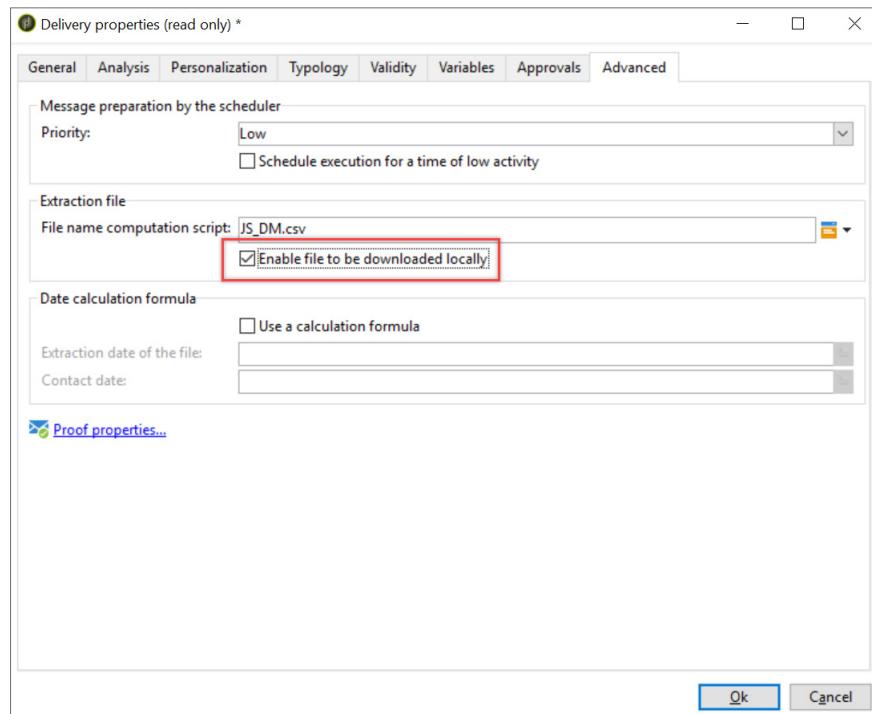
96. Click **Continue** to view the content of the delivery.
97. Click **Save** to save the direct mail delivery.
98. Click **Save** to save the workflow.
99. Click the **Dashboard** tab to view the delivery.
100. Click the **Membership direct mail delivery\_<your initials>** and click **Open** to edit the delivery.
101. Click **Properties**. The **Delivery properties** dialog box opens.

102. Click the **Advanced** tab. The available options are displayed, as shown:

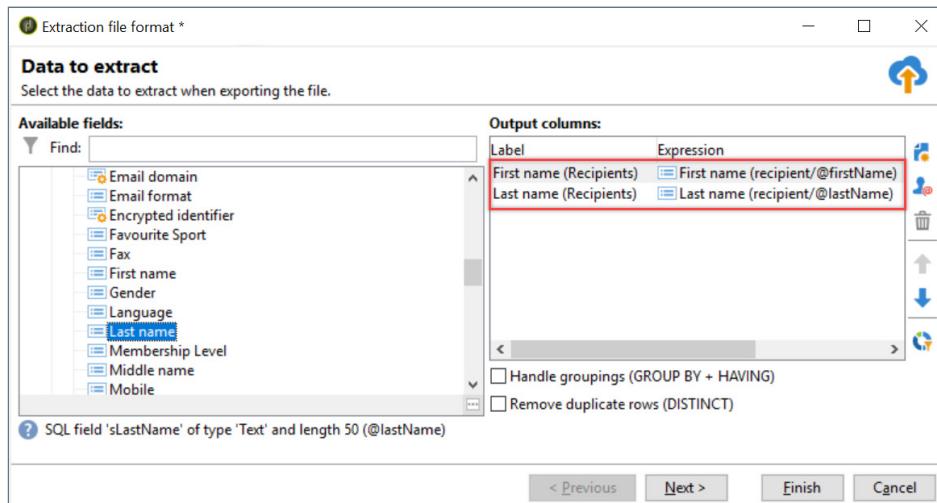


103. In the **File name computation script** field, type <yourinitials>\_DM.csv. For example, type **JS\_DM.csv**.

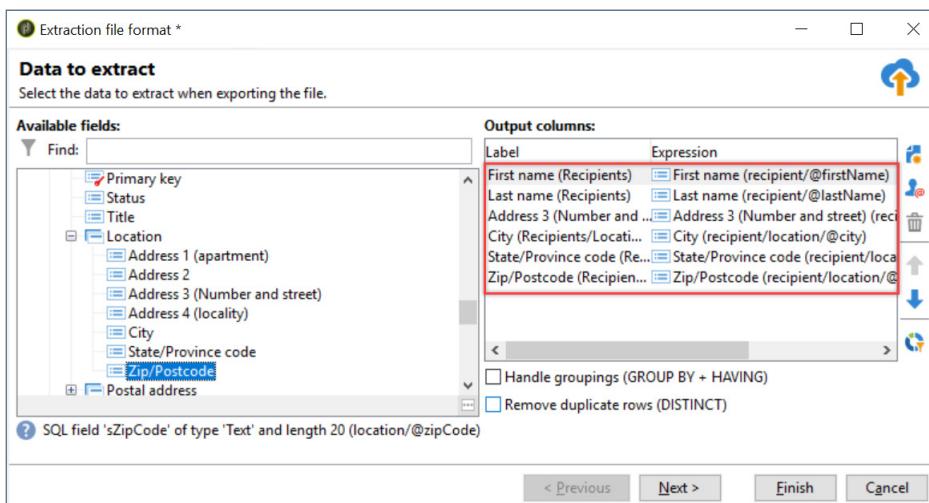
104. Select the **Enable file to be downloaded locally** checkbox, as shown:



105. Click **Ok** to go back to the **Delivery** dialog box.
106. Click the **Edit the extraction file format** link. The **Extraction file format** dialog box opens.
107. In the **Available fields** section, expand **Delivery logs (Recipients) (nms:broadLogRcp) > Recipients**.
108. Double-click **First name** and **Last name** to add them to **Output columns**, as shown:

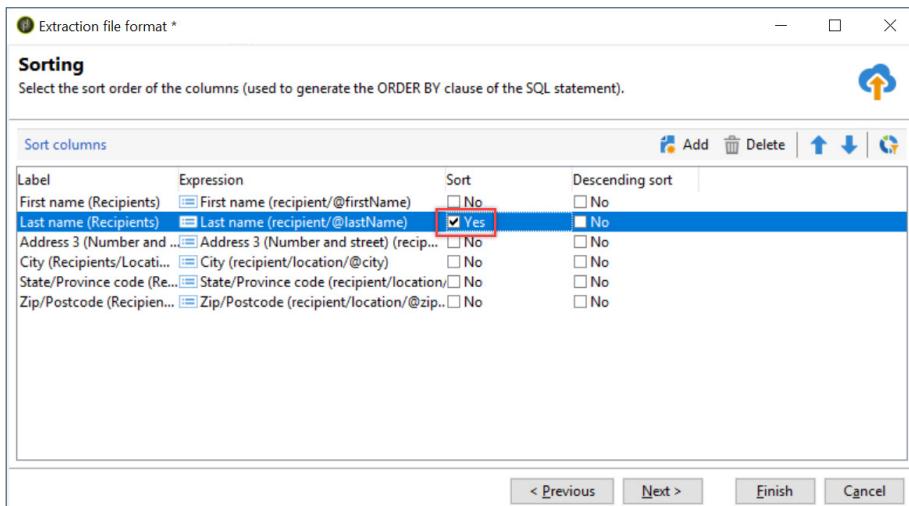


109. Expand **Location**.
110. Double-click **Address3 (Number and street)**, **City**, **State/Province code** and **Zip/Postcode** to add them to **Output columns**, as shown:



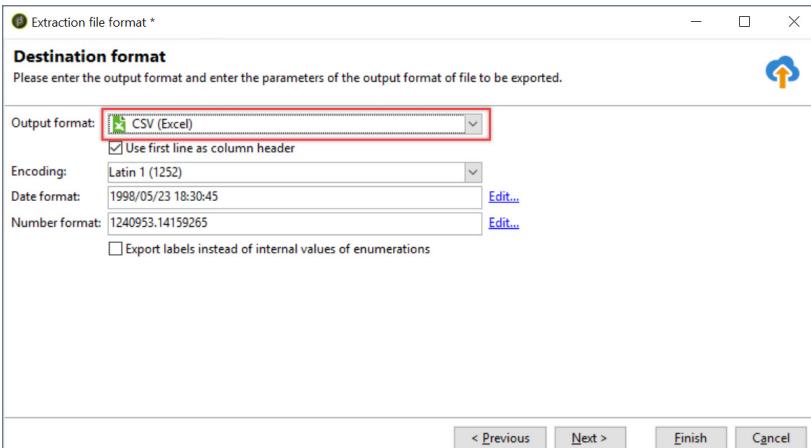
111. Click **Next**. The **Sorting** page opens.

112. Select the **Sort** checkbox in the **Last name** row. When selected, the row changes from **No** to **Yes**, as shown:



113. Click **Next**. The **Destination format** dialog box opens.

114. Click the **Output format** drop-down arrow and select **CSV (Excel)**. The **Destination format** page is updated based on your selection, as shown:



115. Click **Next**. The **Data formatting** page opens.

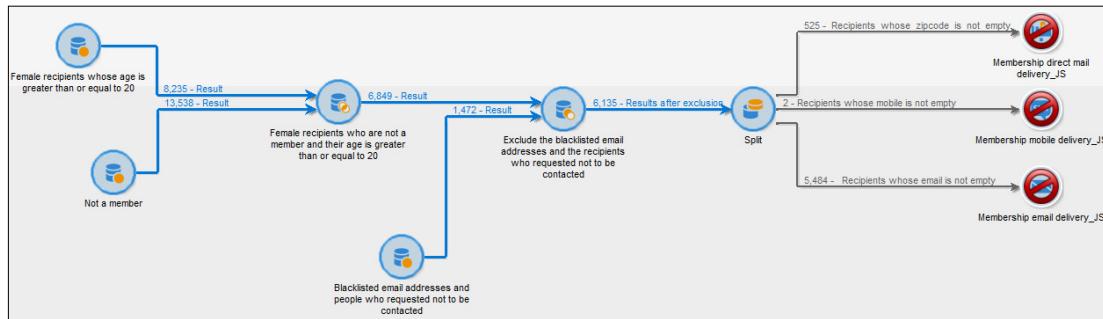
116. Click **Finish** to go back to the **Delivery** dialog box.

117. Click **Save** to save the changes and go back to the **Dashboard** tab.

118. Click the **Targeting and workflows** tab to go back to the workflow.

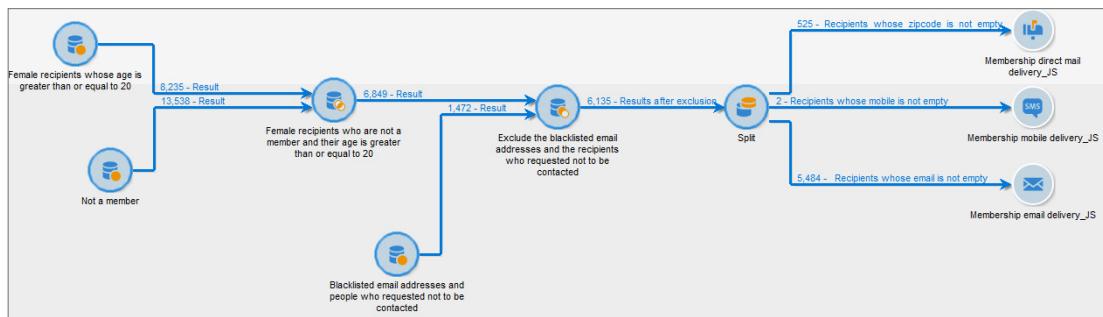
119. Right-click the **Membership direct mail delivery\_<your initials>** activity and select **Do not enable**.

120. Click **Save** to save the workflow, as shown:



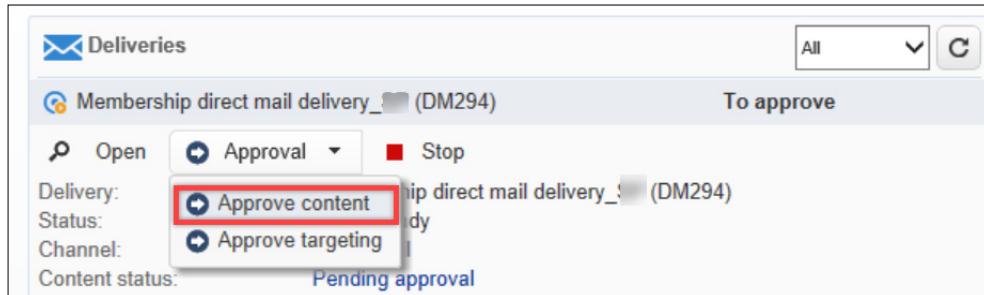
## Task 7: Execute the multi-channel campaign

1. Press the **Ctrl** key and select each of the delivery activities (Direct mail, Mobile delivery, and Email delivery).
2. Right-click and select **Normal execution**.
3. Click **Save**. The workflow is updated, as shown:

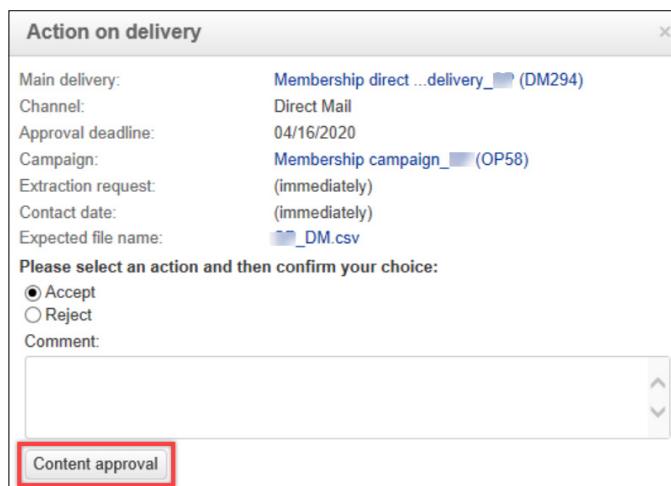


4. Click the **Restart** icon to start the workflow from the beginning. A prompt is displayed.
5. Click **Yes** to proceed with restarting the workflow. The workflow restarts.
6. Notice that the Email delivery activity and the Mobile delivery activity are blinking. The activities are awaiting confirmation. The Direct mail delivery activity does not require approval. Hence, the activity is executed.
7. Click the **Dashboard** tab to view the deliveries.
8. Click the **Membership direct mail delivery\_<your initials>**.

9. Click **Approval** drop-down and select **Approve content**, as shown. The **Action on delivery** window opens.

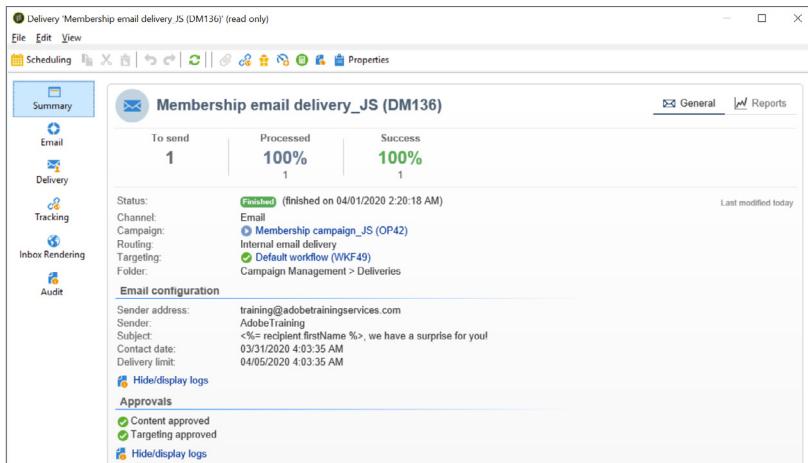


10. Optionally, add a comment and then click **Content approval** button, as shown:



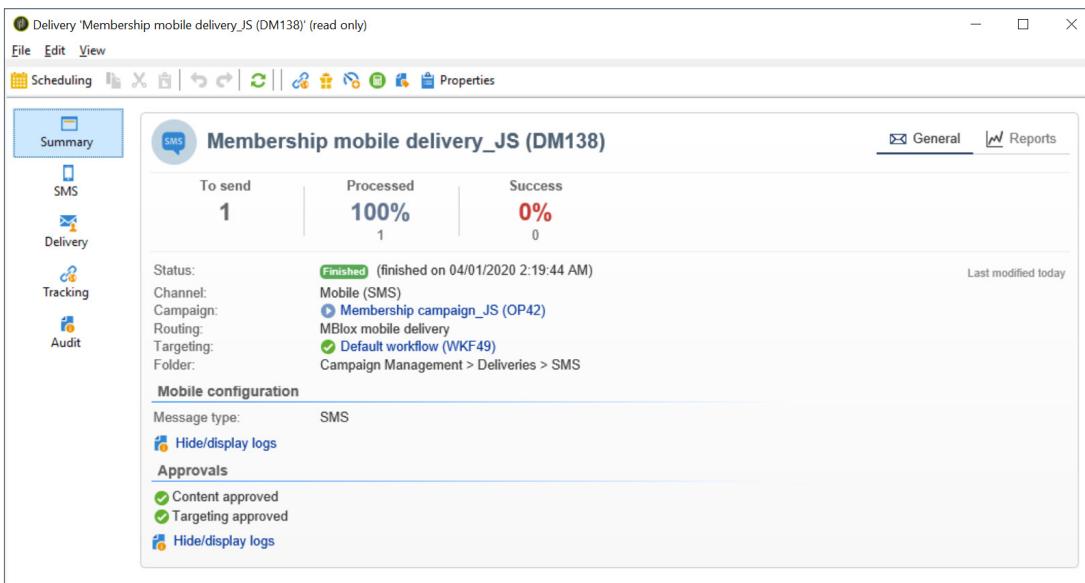
11. Click the **Membership direct mail delivery\_<your initials>** and this time repeat the same steps (steps 9 and 10) for **Approve targeting**.
12. Click the **Membership direct mail delivery\_<your initials>** and then click **Approval** drop-down and select **Approve file**.
13. Click **File approval** in the prompt displayed.
14. Repeat the same steps (steps 9 to 11) for **Membership email delivery\_<your initials>**.
15. Click the **Membership email delivery\_<your initials>** and then click **Confirm delivery**. A prompt is displayed.
16. Click **OK** to confirm the action. The delivery starts, and the recipients will receive a message on their registered mobile number.
17. Repeat steps 14 to 16 for **Membership mobile delivery\_<your initials>**.

18. Click the **Membership email delivery\_<your initials>** and then click **Open**. The Delivery dialog box opens. You can access the **Summary** tab, which is open by default to view the details of the delivery, as shown:

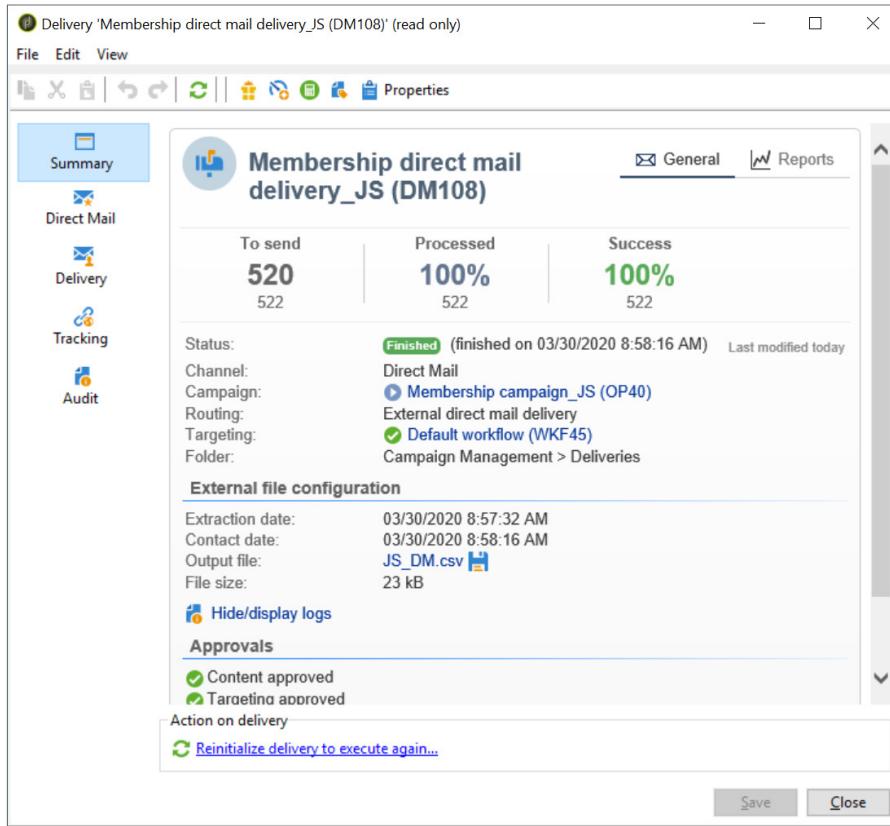


19. Click **Close** to close the Delivery dialog box.

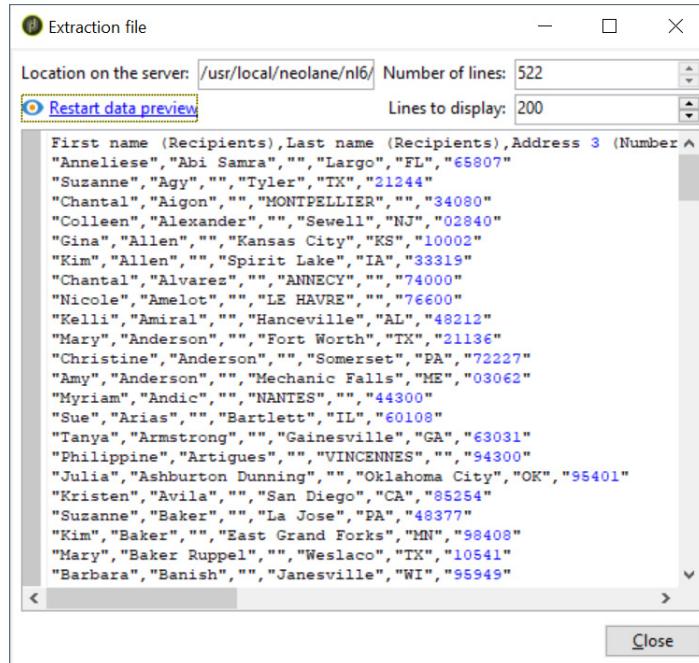
20. Click the **Membership mobile delivery\_<your initials>** and then click **Open**. The Delivery dialog box opens. You can access the **Summary** tab, which is open by default to view the details of the delivery, as shown:



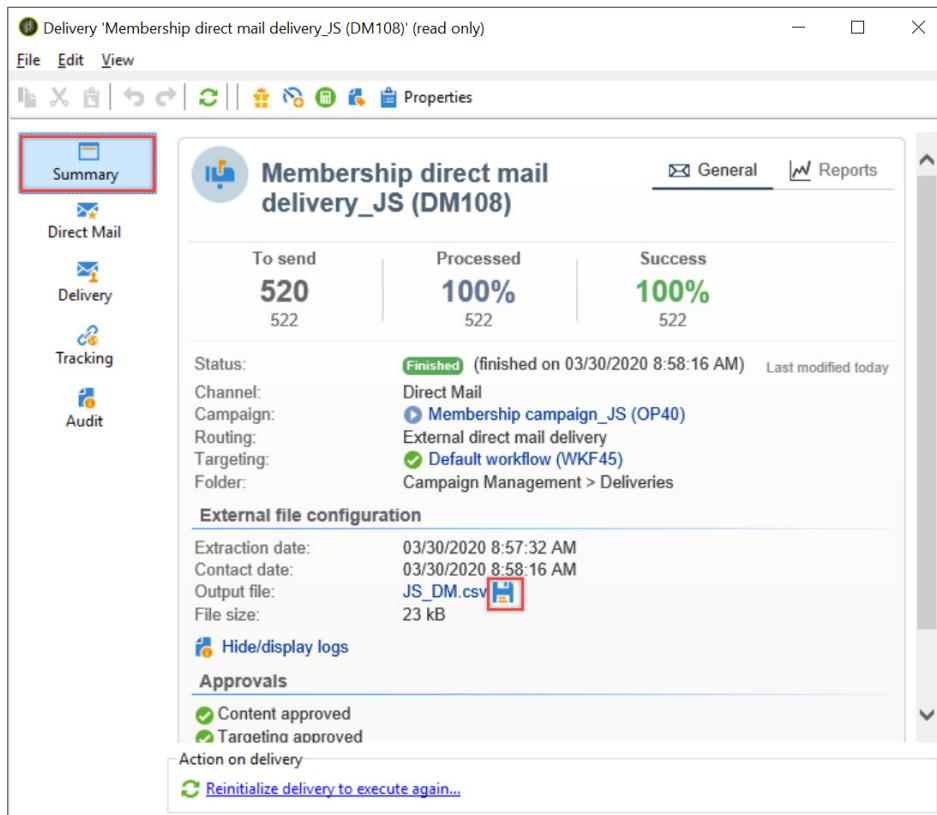
21. Double-click **Membership direct mail delivery\_JS (DM108)** to open it. The Delivery dialog box opens, as shown:



22. Click the link beside **Output file** in the **External file configuration** section to preview the output file, as shown:

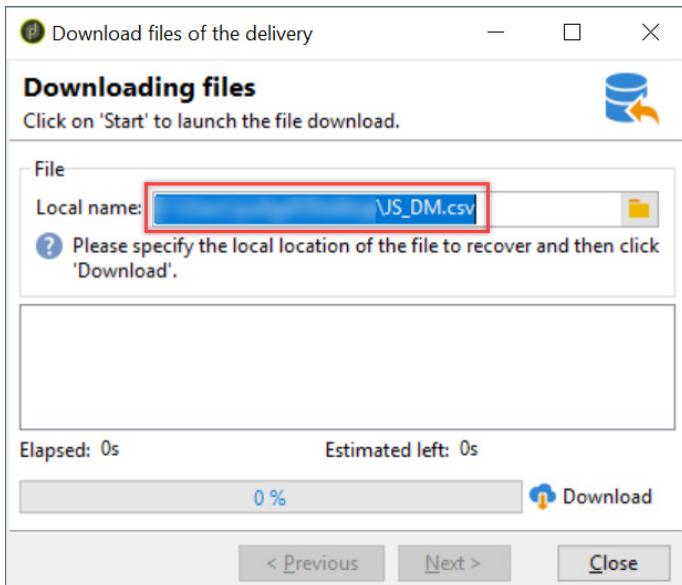


23. Click **Close** to go back to the **Delivery** dialog box.
24. Click the **Audit** tab to view the delivery analysis results.
25. Click the **Causes of exclusions** tab and examine the causes of exclusions.
26. Click the **Summary** tab and click the Download file icon, as shown, to download the output file to your local machine. The **Download files of the delivery** dialog box opens.

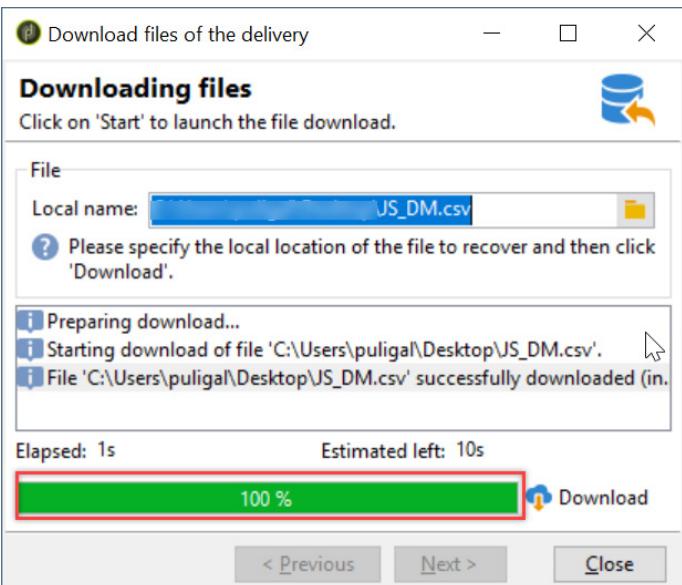


27. In the **Download files of the delivery** dialog box, in the **Local name** field, click the folder icon. The **Open** dialog box opens.

28. Select a location to save the file and click **Save**. The location is added to the **Download files of the delivery** dialog box, as shown:



29. Click **Download**. The download starts, and the progress bar displays 100% when the download is completed, as shown:

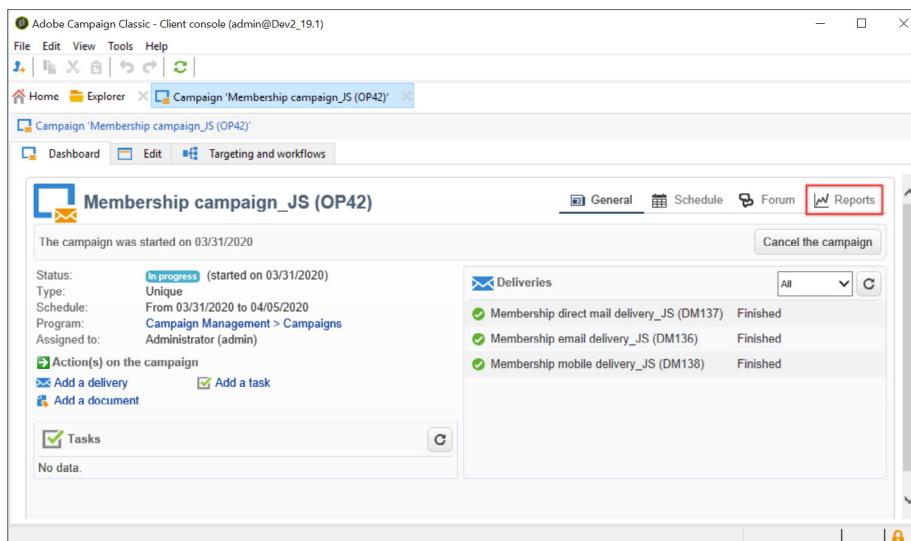


You can navigate to the specified location to view the downloaded file. The file contains data on the target population. You can share this file with your direct mail provider who will deliver personalized letters to the recipients.

## Exercise 2: Create a Delivery summary report of the multi-channel campaign

**Scenario:** Your company wants to view the consolidates delivery statuses of the individual deliveries in the multi-channel campaign that you sent in Exercise 1. In this exercise, you will generate a Delivery summary report of the campaign that will help your team to analyze the campaign.

1. In the **Explorer** view, click **Campaign Management > Campaigns**. The available campaigns are displayed in the list view.
2. Double-click **Membership campaign\_<your initials>** to open it. If the campaign opens on the **Targeting and workflows** tab, click the **Dashboard** tab.
3. Click **Reports** in the upper right, as shown. The available reports of the campaign are displayed.



4. Select the **Delivery summary** report. The **Delivery summary** report opens, as shown:

**Membership campaign JS (OP42)**

**Delivery summary**

**Initial target population**

Date	Action	Initial population	Rejected by rules
03/31/2020 4:07 AM	Membership mobile delivery_JS	1	0.00%
03/31/2020 4:03 AM	Membership direct mail delivery_JS	525	9%
03/31/2020 4:03 AM	Membership email delivery_JS	5,484	91% 5,483 99.98%
<i>Totals:</i>		6,010	100% 5,486 91.28%
<i>Averages:</i>		2,003	

**Execution statistics**

Date	Action	Messages to deliver	Success	Errors	New quarantines
03/31/2020 4:07 AM	Membership mobile delivery_JS	1	100%	0	0.00%
03/31/2020 4:03 AM	Membership direct mail delivery_JS	522	100%	522 100.00%	0 0.00%
03/31/2020 4:03 AM	Membership email delivery_JS	1	100%	1 100.00%	0 0.00%
<i>Totals:</i>		524	100%	523 99.81%	0 0.00%
<i>Averages:</i>		175	100%	174 99.81%	0 0.00%

You can view the consolidated report of the individual deliveries of the campaign. You can view the details, such as how many recipients were targeted, how many of them successfully received the deliveries, and how many of them were rejected from the target population.

## Exercise 3: Create a Descriptive analysis report of an Email delivery

**Scenario:** Your company has asked you to create a report to understand the successful target population of an email delivery and the target population's age group, so your company can design a strategy for the next campaign. In this exercise, you will generate a Descriptive analysis report of the email delivery that you created in Exercise 1.

1. In the Explorer view, navigate to **Campaign Management > Deliveries**. The list of deliveries is displayed in the list view.
2. Select the **Membership email delivery** you created in Exercise 1, as shown:

The screenshot shows the Oracle Marketing Cloud Service interface. On the left, the navigation pane is visible with sections like Home, Explorer, Administration, Resources, Profiles and Targets, Campaign Management (Campaigns, Deliveries, Budgets, Simulations), MRM, Offers - design, and Offers - live. The main area has two tabs: 'Deliveries (By label or type)' and 'Delivery 'Membership email delivery\_JS (DM136)'. The 'Deliveries' tab shows a list of deliveries with columns: Label, Delivery code, Status, Contact date, Messages to send / Processed, Success, and Last modified. One delivery is highlighted: 'Membership\_email\_delivery\_JS' (Delivery code: JS, Status: Finished, Contact date: 03/31/2020 4:03:50 AM, Processed: 522, Success: 522, Last modified: 04/01/2020 2:2). Below this, the 'Delivery 'Membership email delivery\_JS (DM136)' tab is active, displaying details: To send: 1, Processed: 100% (1), Success: 100% (1). It also shows the status as Finished (finished on 04/01/2020 2:20:18 AM), Channel as Email, and Campaign as 'Membership campaign\_JS (OP42)'. The 'General' tab is selected.

- Click the **Actions** icon and select **Explore the target** from the drop-down list, as shown. The **Descriptive analysis wizard** opens.

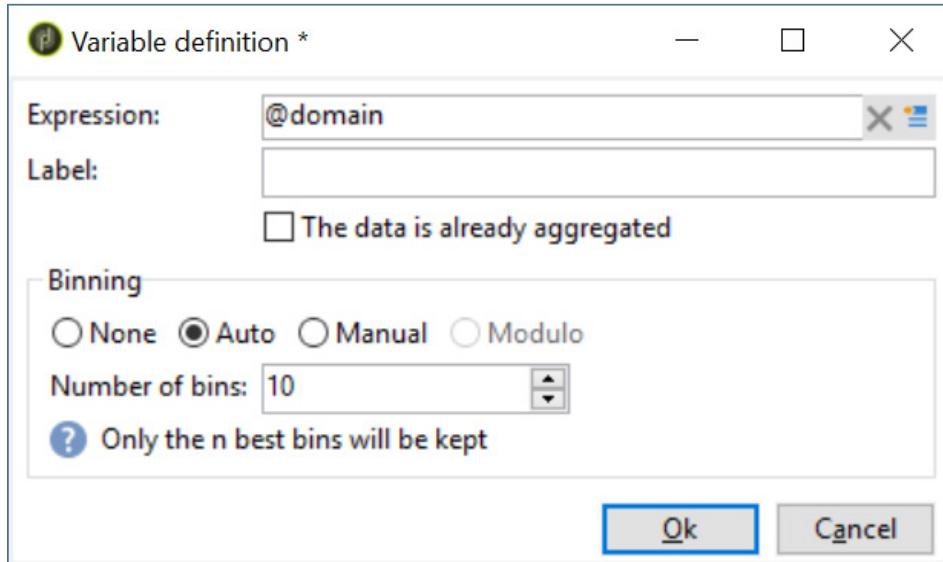
The screenshot shows the 'Deliveries (By label or type)' grid. The grid columns include Label, Delivery code, Status, Contact date, and more. Several rows are listed, such as 'Membership direct mail delivery\_JS' and 'Membership email delivery\_JS'. The 'Actions' ribbon at the top has a dropdown menu with options like 'Explore the target...', 'Explore the exclusions...', 'Start', 'Pause', etc. The 'Explore the target...' option is highlighted with a red box.

- In the **Title** field, type **Membership email delivery descriptive analysis**.
- Click **Next**. The **Table configuration** page opens.
- Click **Add** in the column, as shown. The **Variable definition** dialog box opens.

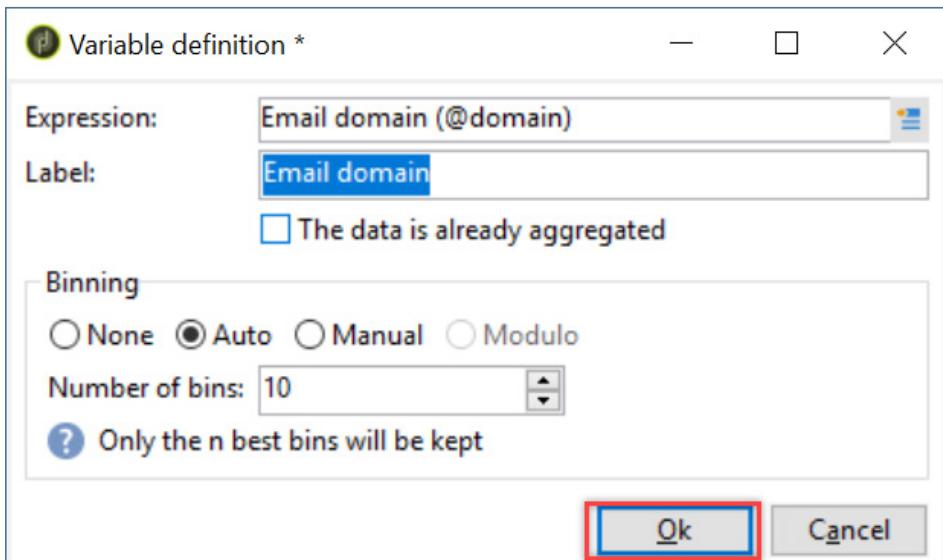
The screenshot shows the 'Table configuration' dialog box. It includes sections for 'Display settings' (with 'Display statistics label' and 'Display subtotals' checked) and 'Select variables' (which contains a table with an 'Add...' button highlighted with a red box). The 'General' tab is selected at the bottom.

- Click the **Edit expression icon** in the **Expression** field. The **Select an expression** dialog box opens.

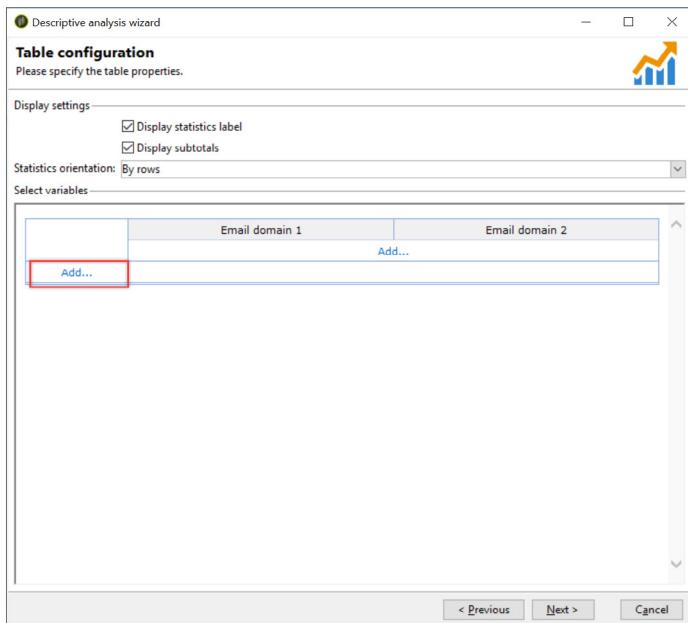
8. Select **Email domain** and click **Finish**. The **Variable definition** dialog box is updated based on the selection, as shown:



9. Press the **Tab** button to auto-populate the **Label** field with the required value.  
10. Click **Ok**, as shown, to go back to the **Table configuration** page.

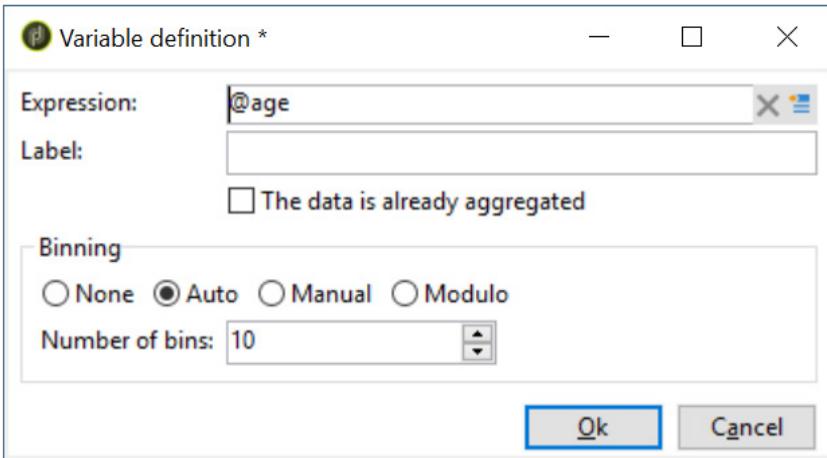


11. Click **Add** in the row, as shown. The **Variable definition** dialog box opens.



12. Click the **Edit expression** icon in the **Expression** field. The Select an expression dialog box opens.

13. Select **Age** and click **Finish**. The Variable definition dialog box is updated based on the selection, as shown:



The Binning section enables you to select the following options.

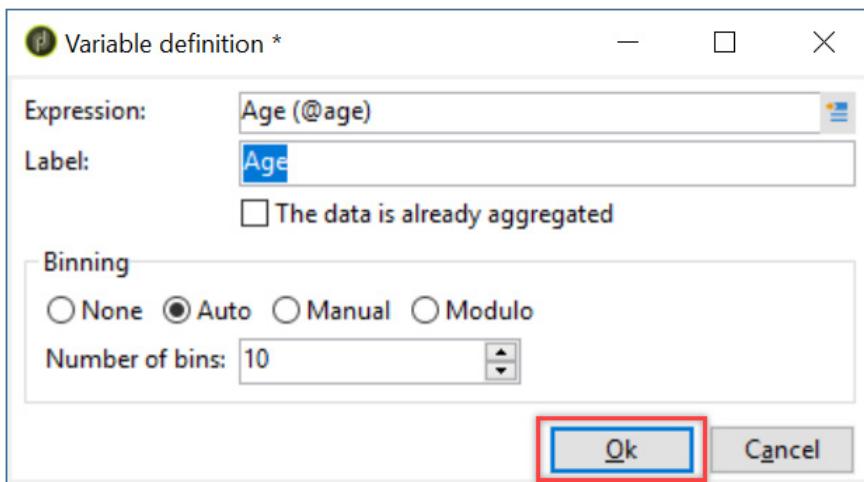
**Auto** = creates a set number of the largest bins.

**Manual** = create your own user-defined age brackets.

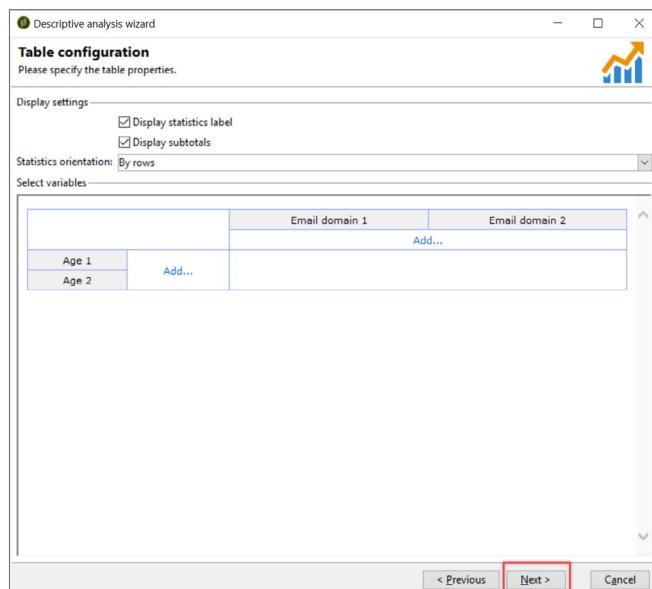
**Modulo** = Creates age buckets of the selected range. For example, if number the of bins is 10, it will create age bins 20-30, 30-40, 40-50.

14. Press the **Tab** key to auto-populate the **Label** field with the required value.

15. Click **Ok**, as shown, to go back to the **Table configuration** page.



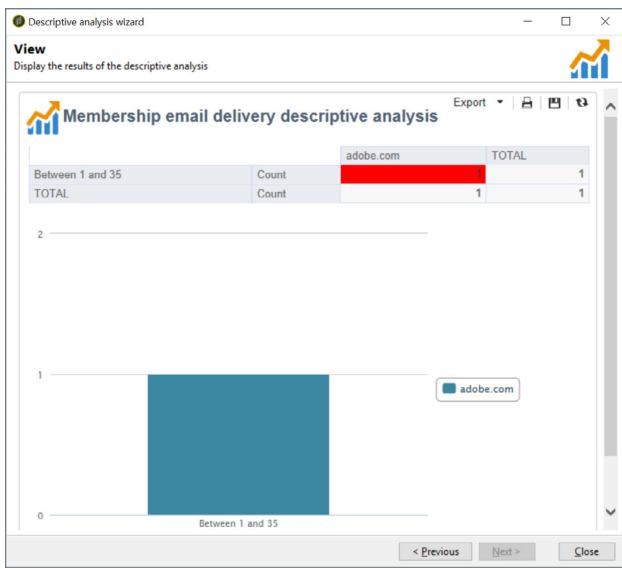
16. Click **Next**, as shown. The **Chart** page opens. You can select the chart type on the page. However, the **Histogram** chart type is selected by default.



17. Click **Next**. The **Statistics** page opens.

18. Retain the default statistics, which is **Count**.

19. Click **Next**. The **View** page opens and displays the descriptive analysis report, as shown:



The report displays the email domains and age group of the recipients who received the email delivery.

20. Click **Close** to close the **Descriptive analysis wizard** window.

## Control Groups

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Campaign Classic enables you to form a control group from the main target by taking a sample.

Campaign Classic selects the sample randomly, and the sample will be compared to the target.

You can also create a predefined control group and reuse it if required.

A control group enables you to:

- Create a subpopulation to exclude from your target
- Compare the behavior of the people who received the delivery against the people in the control group who did not receive the delivery
- Identify and classify the effects of the campaigns you conducted

The people in the control group are marked in the delivery logs as *excluded* because they were in the control group. You can also configure a list of people as the control group.

## Exercise 4: Send a multi-delivery campaign by configuring control groups

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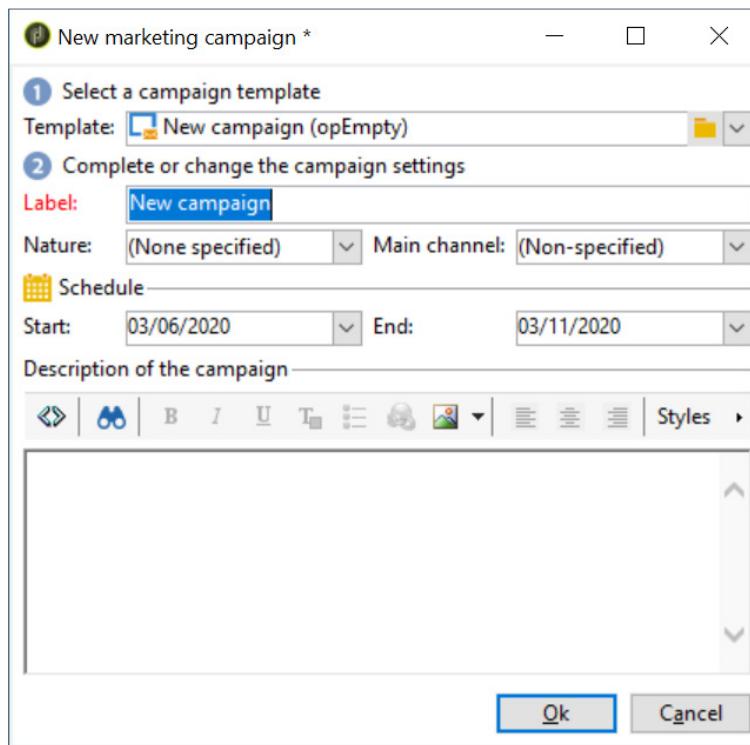
**Scenario:** Your marketing team has asked you to create a campaign and check the effectiveness of the campaign. You need to configure the control group in the campaign to select a random group from your recipient list and exclude the members of that group from receiving the campaign. In this exercise, you will create a campaign and configure the control group in the campaign. In the Campaign, you will target recipients who are Gold or Platinum members and between 18 and 65 years old. You will then split the population to identify members who play a ball game and those who do not play a ball game. In this exercise, you will perform the following tasks:

1. Create queries with the Intersection and the Exclusion activities to identify the target population
2. Create a predefined user filter for ball sports
3. Identify the recipients who play ball sports and who do not play ball sports
4. Configure and execute the Email deliveries

**Task 1:** Create queries with Intersection and Exclusion activities to identify the target population

1. On the **Home** page, click **Explorer**.
2. In the Explorer view, expand the **Campaign Management** folder.
3. Click **Campaigns**. The list of campaigns is displayed in the list view.

4. Click the **New** icon. The **New marketing campaign** dialog box to create a new campaign opens, as shown:



5. Ensure the **New campaign (opEmpty)** template is selected in the **Template** field.
6. In the **Label** field, type **Ball sports campaign\_<your initials>**. For example, type **Ball sports campaign\_JS**.
7. Click **Ok**. The new campaign is created and added to the list view, as shown:

Campaigns	Status	/ Start	/ End	/ Nature
Membership campai...	Started	03/06/2020	03/11/2020	(None specified)
Autumn sale offers...	Started	03/05/2020	03/10/2020	(None specified)
Ball sports campaign_. Started	In progress	03/06/2020	03/11/2020	(None specified)

8. Double-click the new campaign to open it on a separate tab.

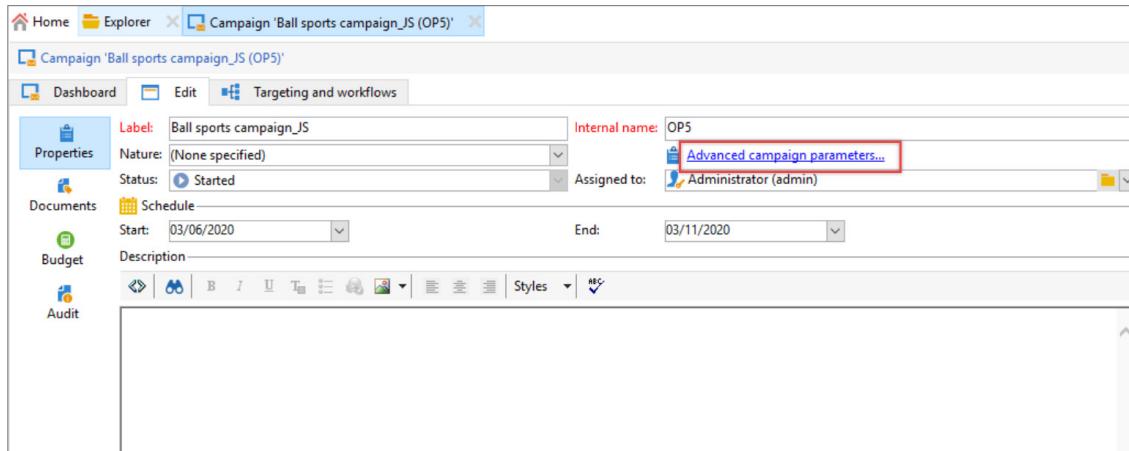
9. Review the **Dashboard** tab of the campaign.

 **Note:** On the **Dashboard** tab, you can create deliveries that are related to your communication strategy.

To configure the Control Group:

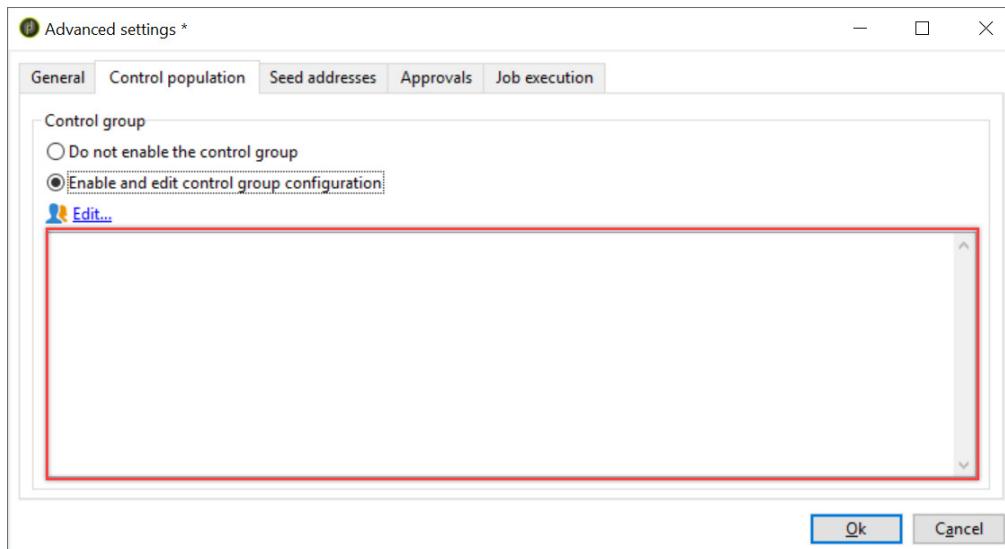
10. Click the **Edit** tab of the campaign. The available options are displayed.

11. Click **Advanced campaign parameters**, as shown. The **Advanced settings** dialog box opens.



12. Click the **Control population** tab. The available options are displayed.

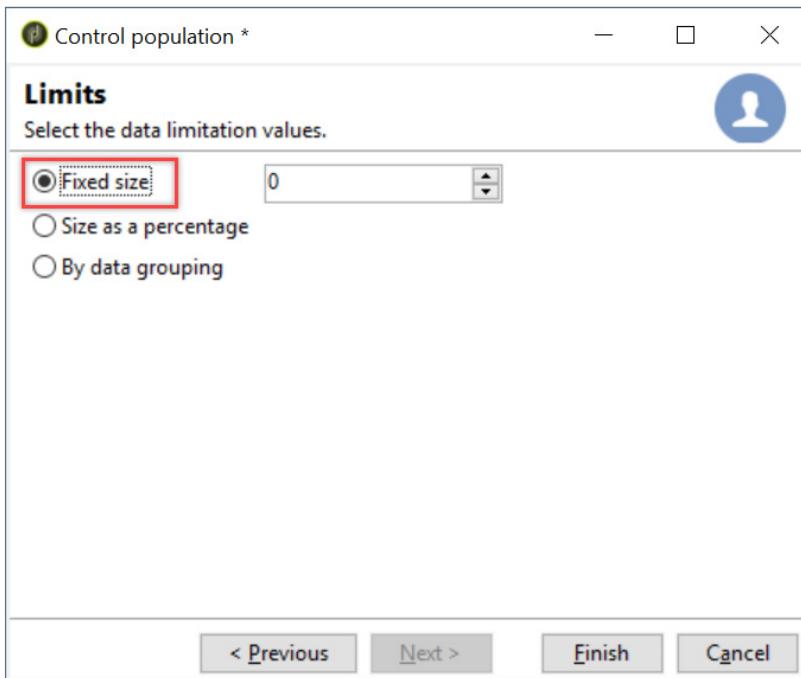
13. Select **Enable and edit control group configuration**. The dialog box is updated based on the selection, as shown:



14. Click **Edit**. The **Control population** dialog box opens.

15. Select **Activate random sampling** and click **Next**. The **Limits** page opens.

16. Ensure that the **Fixed size** option is selected, as shown:



17. Type **1** as a value in the **Fixed size** field.

 **Note:** The usual configuration is to select the **Size as a percentage** option and configure the value to 10%. As the number of delegates are too low to match the 10% option, select a fixed number of persons instead (for example, 1 or 2).

18. Click **Finish** to close the **Control population** dialog box.

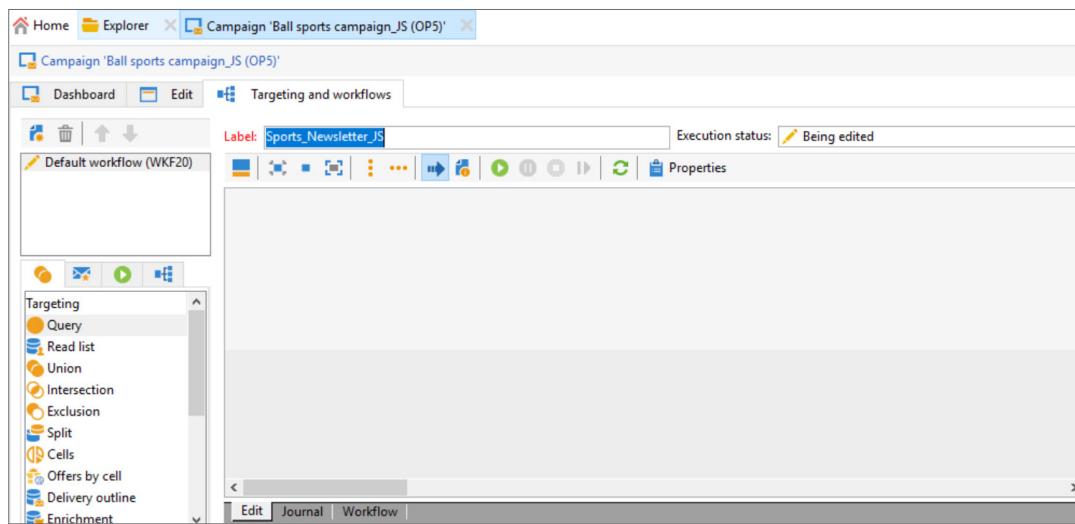
19. Click **Ok** to close the **Advanced settings** dialog box.

20. Click **Save** on the **Edit** tab to save the changes.

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

22. In the **Label** field, type the name for the workflow as **Sports\_Newsletter\_<your initials>**. For example, type **Sports\_Newsletter\_JS**.

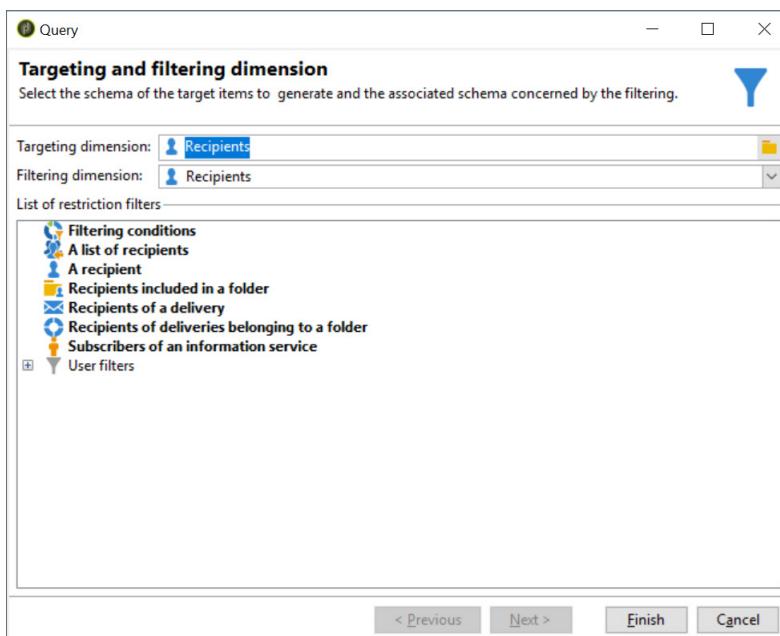
23. Click **Save** to save your workflow, as shown:



24. Drag a **Query** activity onto the workspace.

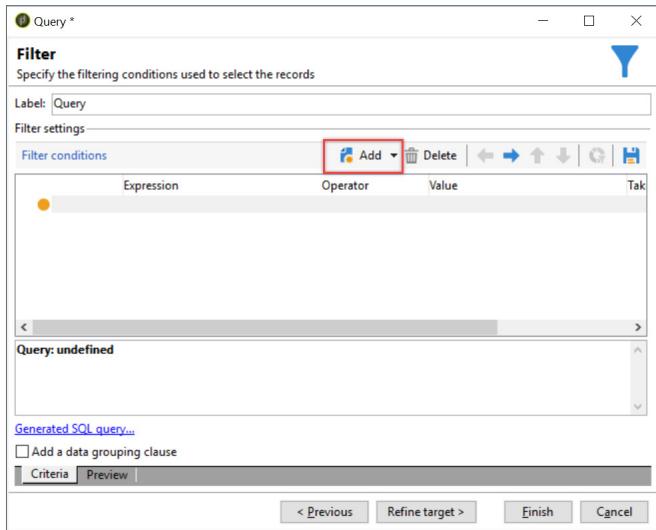
25. Double-click the **Query** activity. The **Query** dialog box opens.

26. Click the **Edit query** link. The **Targeting and filtering dimension** page opens, as shown:



27. Select **Filtering conditions** and click **Next**. The **Filter** page opens.

28. Click **Add** to add an expression, as shown. A new field is added to the **Expression** column.



29. Click the **Edit expression** icon. The **Select an expression** dialog box opens.

30. Double-click **Age**, as shown. The field is added to the **Expression** column.

31. Click the **Operator** field and select **less than or equal to** from the drop-down list.

32. Click the **Value** field and type **65**.

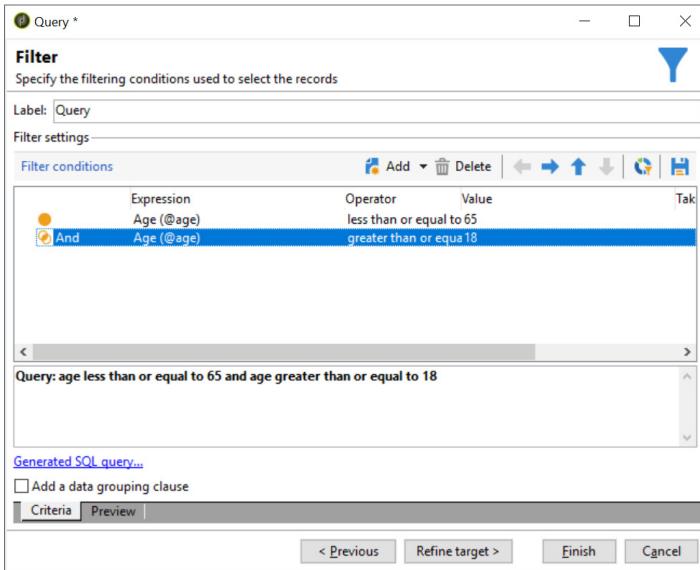
33. Click **Add**. A new field is added to the **Expression** column. By default, the two expressions are combined with the logical operator **And**.

34. Click the **Edit expression** icon. The **Select an expression** dialog box opens.

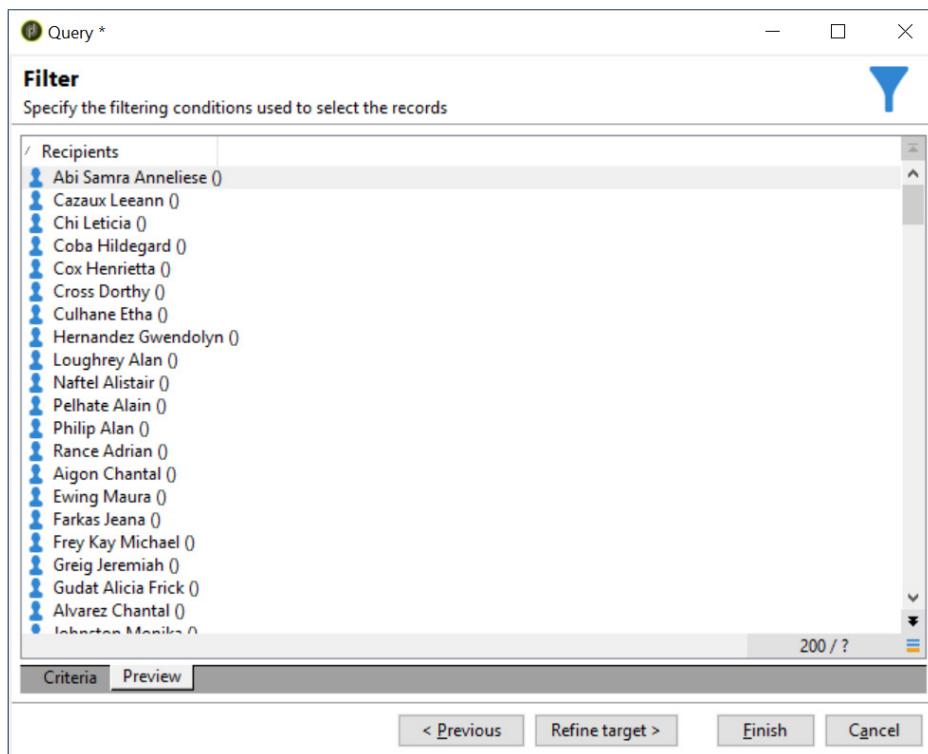
35. Double-click **Age**. The field is added to the **Expression** column.

36. Click the **Operator** field, select **greater than or equal to** from the drop-down list.

37. Click the **Value** field and type **18**, as shown:



38. Click the **Preview** tab to view the query results, as shown:



39. Click **Finish** to close the **Filter** page.

40. In the **Label** field, type **Recipient age group 18-65**.

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

42. Click **Save** to save the workflow, as shown:



43. Drag another **Query** activity onto the workflow.

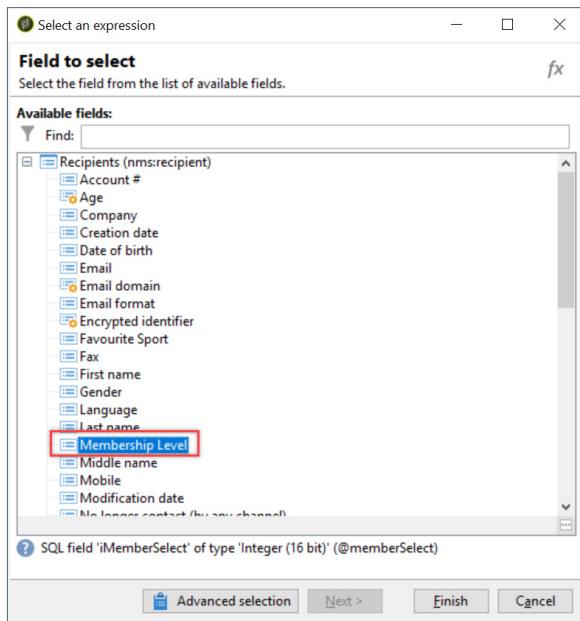
44. Double-click the **Query** activity. The **Query** dialog box opens.

45. Click **Edit query**. The **Targeting and Filtering dimensions** page opens.

46. Double-click **Filtering conditions**. The **Filter** page opens.

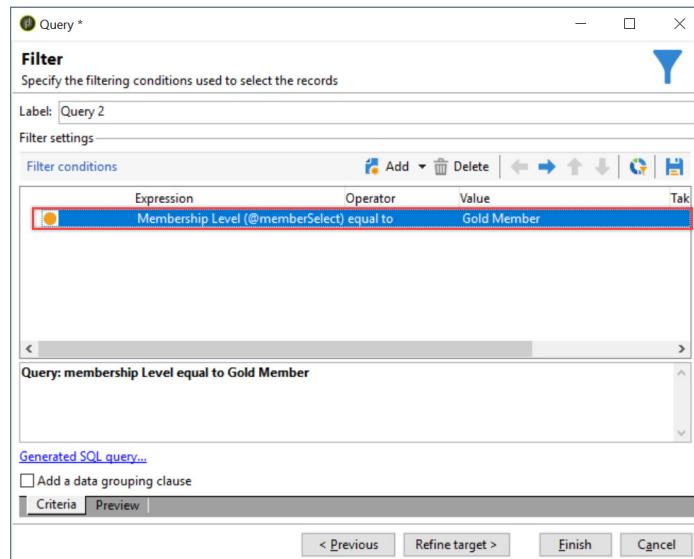
47. In the **Expression** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.

48. Select **Membership Level**, as shown, and click **Finish**. The **Membership Level(@memberSelect)** expression is added to the **Expression** field.



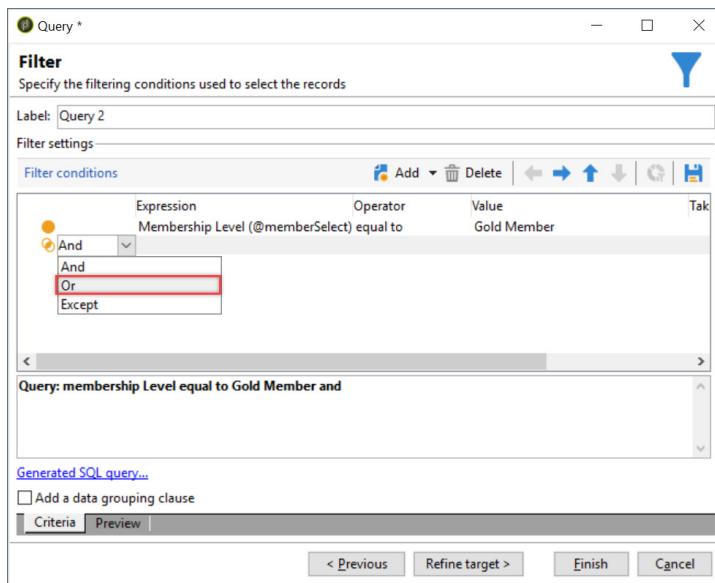
49. In the **Operator** field, if not selected by default, ensure **equal to** is selected.

50. Click the **Value** field and select **Gold Member**, as shown:



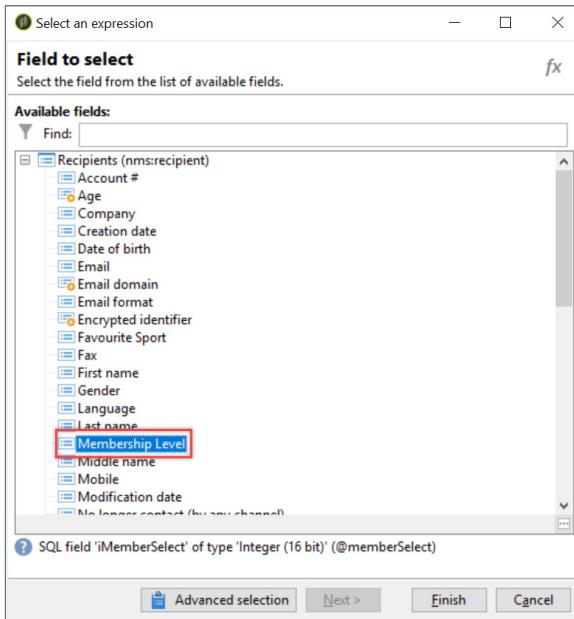
51. Click **Add** to add another expression.

52. Change the **And** operator and select **Or** from the drop-down list, as shown:



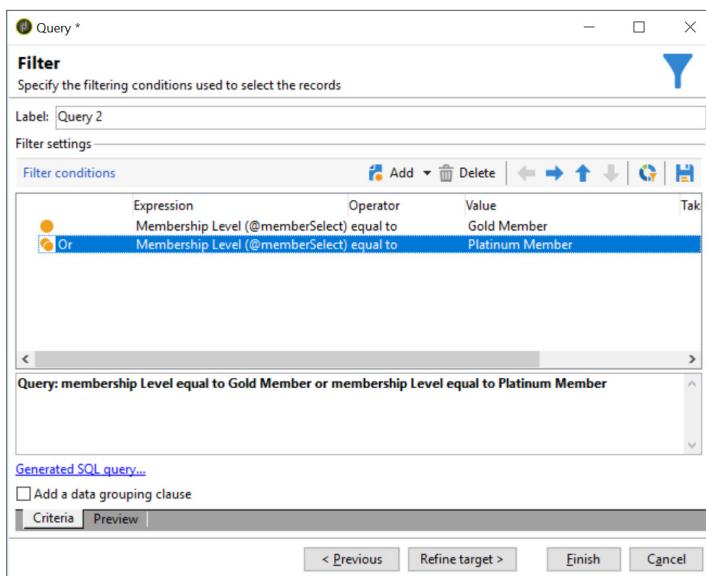
53. In the **Expression** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.

54. Select **Membership Level**, as shown, and click **Finish**. The **Membership Level(@memberSelect)** expression is added to the **Expression** field.



55. In the **Operator** field, if not selected by default, ensure **equal to** is selected.

56. Click the **Value** field, and select **Platinum Member**, as shown:



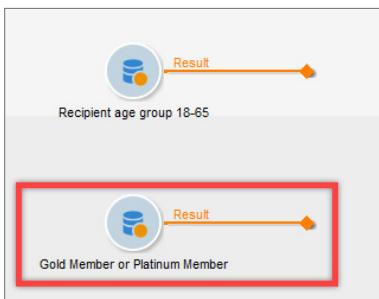
57. Click **Preview** to view the results of the filtering conditions.

58. Click **Finish** to close the **Filter** page.

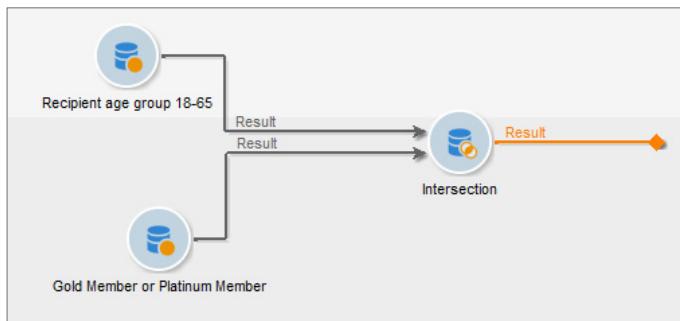
59. In the **Label** field, type **Gold or platinum members**.

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

61. Click **Save** to save the workflow, as shown:

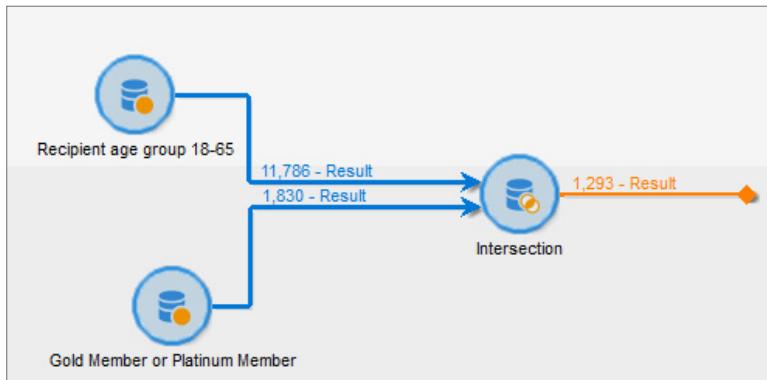


62. Drag an **Intersection** activity and join it with the transition lines of both queries, as shown:



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

64. Click the **Start** icon to start the workflow and check the results, as shown:



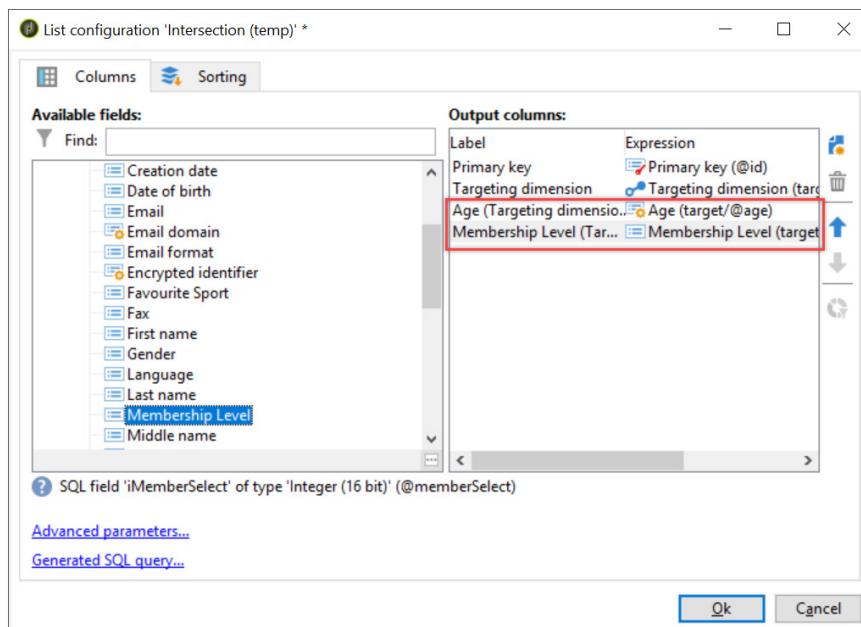
65. Right-click the outbound transition (arrow coming out of **Intersection**) of the **Intersection** activity and select **Display the target**. The **View population** dialog box opens.

66. Right-click the empty space and select the **Configure list**. The **List configuration 'Intersection (temp)**' dialog box opens.

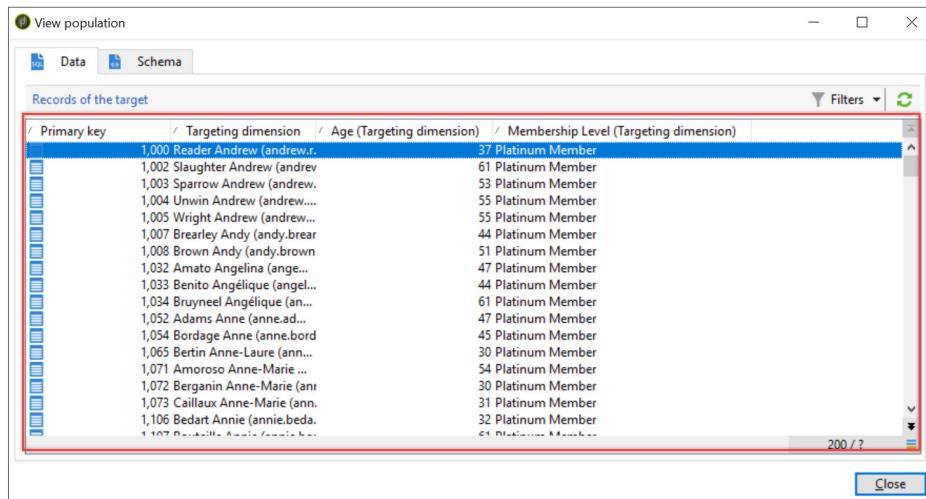
67. In the **Available fields** section, expand **Targeting dimension**.

68. Double-click **Age** to add the field to **Output columns**.

69. Double-click **Membership Level** to add the field to **Output columns**, as shown:



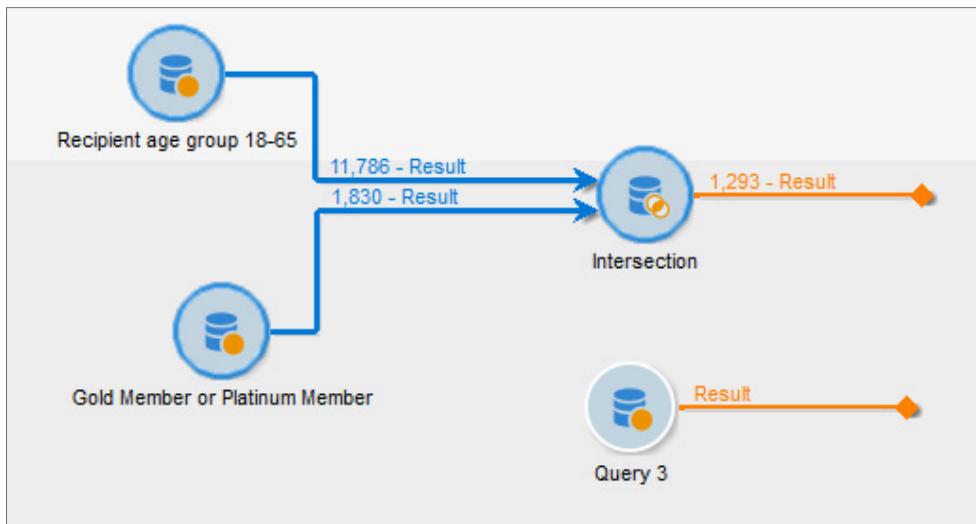
70. Click **Ok** to go back to the **View population** dialog box, as shown:



You can now view the age of the recipients as well as their membership level.

71. Click **Close** to close the **View population** dialog box.

72. Drag a **Query** activity onto the workflow, (below the **Intersection** activity), as shown. The Query activity is labeled as **Query 3**.



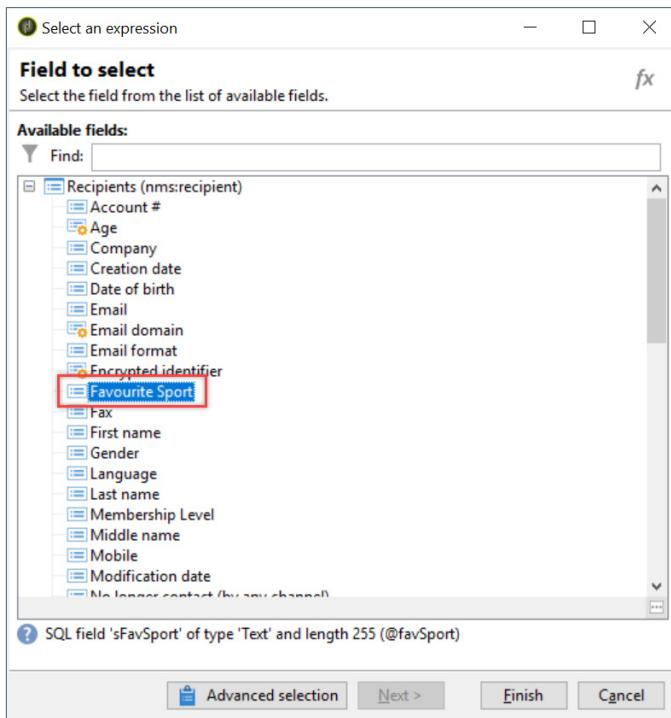
73. Double-click **Query 3**. The **Query** dialog box opens.

74. Click **Edit query**. The **Targeting and filtering dimension** page opens.

75. Double-click **Filtering conditions**. The **Filter** page opens.

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

77. Select **Favourite Sport**, as shown, and click **Finish**. The **Favourite Sport (@favSport)** expression is added to the **Expression** field.



78. In the **Operator** field, if not selected by default, ensure **equal to** is selected.

79. Click the **Value** field and select **None specified**.

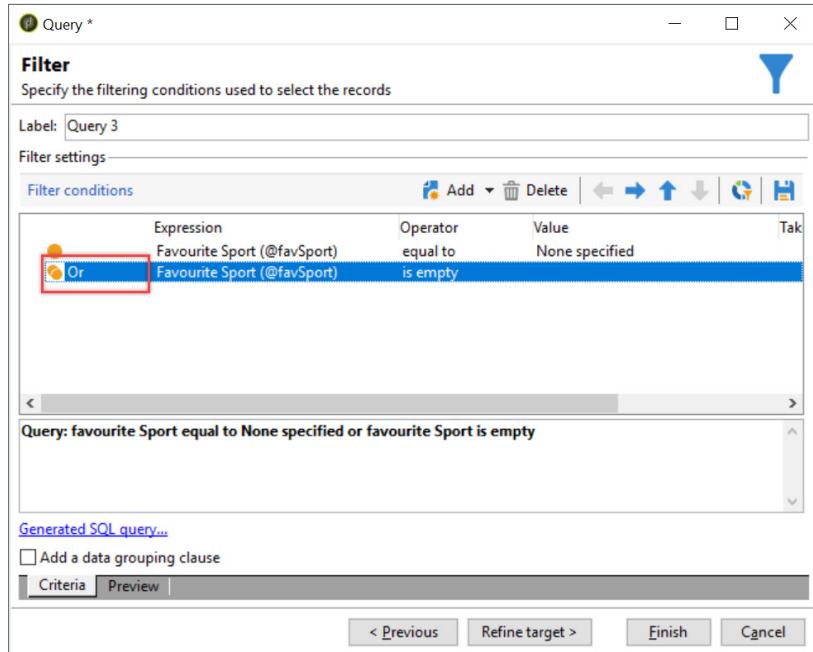
80. Click **Add** to add another expression.

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

82. Select **Favourite Sport** and click **Finish**. The **Favourite Sport (@favSport)** expression is added to the **Expression** field.

83. In the **Operator** field and select **is empty** from the drop-down list.

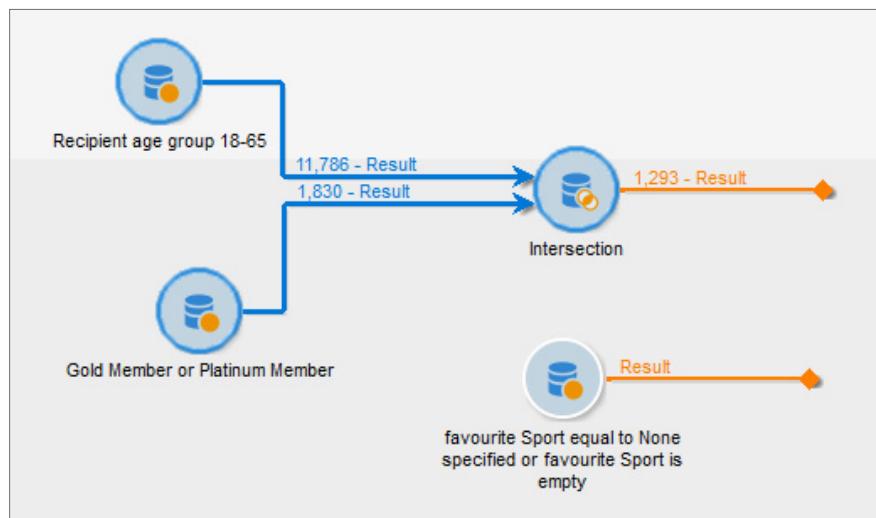
84. Click the **And** operator, and select **Or** from the drop-down list, as shown:



85. Click **Finish** to close the **Filter** page.

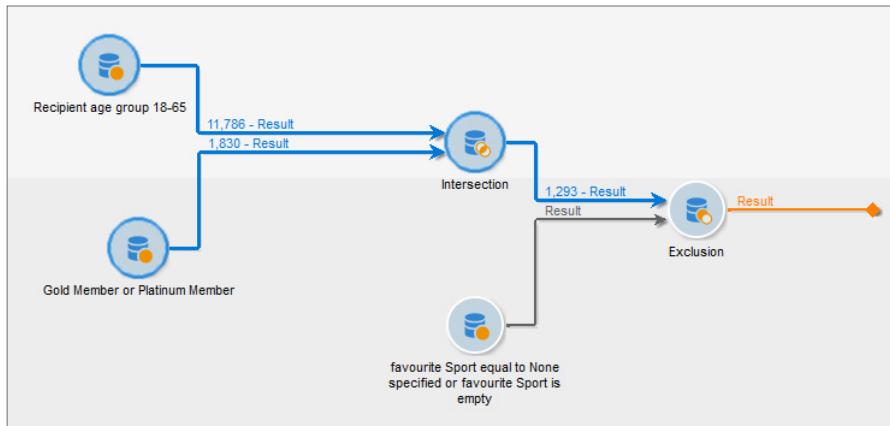
86. Click **Ok** to close the **Query** dialog box.

87. Click **Save** to save the workflow, as shown:

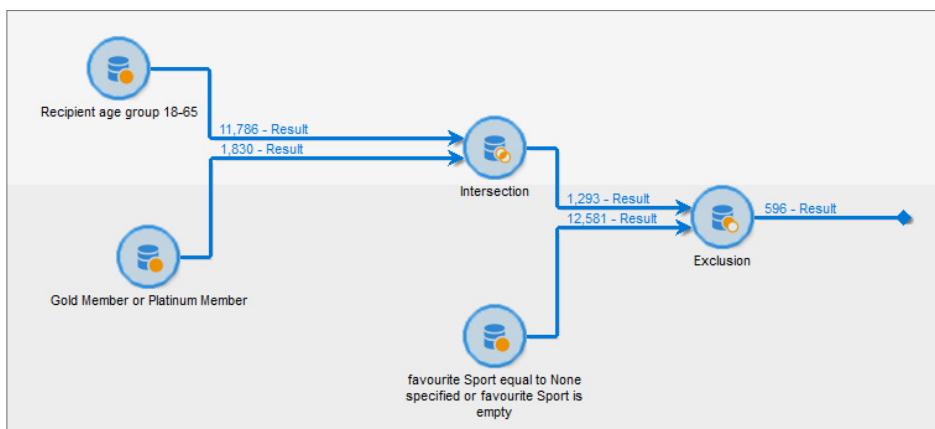


88. Drag an **Exclusion** activity onto the workflow.

89. Join the transition line from the **Intersection** activity and the third **Query** activity to the **Exclusion** activity, as shown:



90. Double-click the **Exclusion** activity. The **Exclusion** dialog box opens.  
 91. In the **Primary set** field, click the drop-down arrow and then select **Intersection**.  
 92. Click **Ok** to go back to the workflow.  
 93. Click **Save** to save the workflow.  
 94. Click the **Restart** icon. A prompt is displayed.  
 95. Click **Yes** to start the workflow. The workflow restarts and displays the results, as shown:



96. Right-click the transition line from the **Exclusion** activity and select **Display the target**. The **View population** dialog box opens.  
 97. Right-click the empty space and select the **Configure list**. The **List configuration** dialog box opens.  
 98. In the **Available fields** section, expand **Targeting dimension**.  
 99. Double-click **Favourite Sport** to add the field to **Output columns**.

100. Click **Ok** to go back to the **View population** dialog box. You can now view the list of the recipients who have specified their favorite sport.

101. Click **Close** to close the **View population** dialog box.

## Task 2: Create a predefined user filter for ball sports

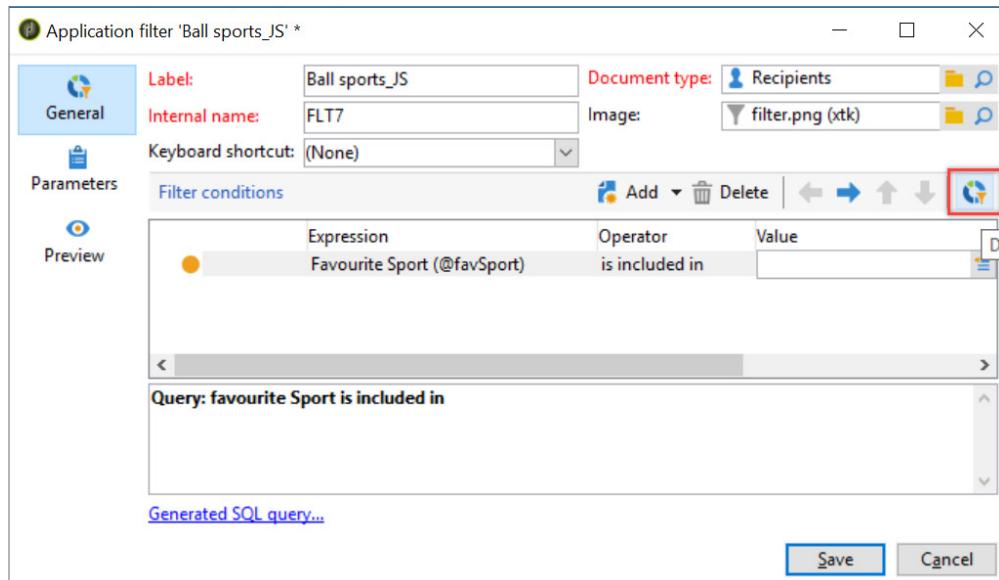
1. Click the **Explorer** tab if it is already open. Otherwise, click the **Explorer** option on the toolbar.
2. In the Explorer view, navigate to **Profiles and Targets > Predefined filters**. The available predefined filters are displayed in the list view, as shown:

The screenshot shows the 'Predefined filters' list view. A red box highlights the list of filters. Below the list is a detailed view of the 'Blacklisted email address' filter. The detailed view includes fields for Label (Blacklisted email address), Internal name (rcplnBlackList), Document type (Recipients), Image (filter.png (xtk)), and Keyboard shortcut (None). The 'Filter conditions' section shows two entries: 'No longer contact (by any channel... equal to Yes' and 'Or No longer contact by email (@blackL equal to Yes').

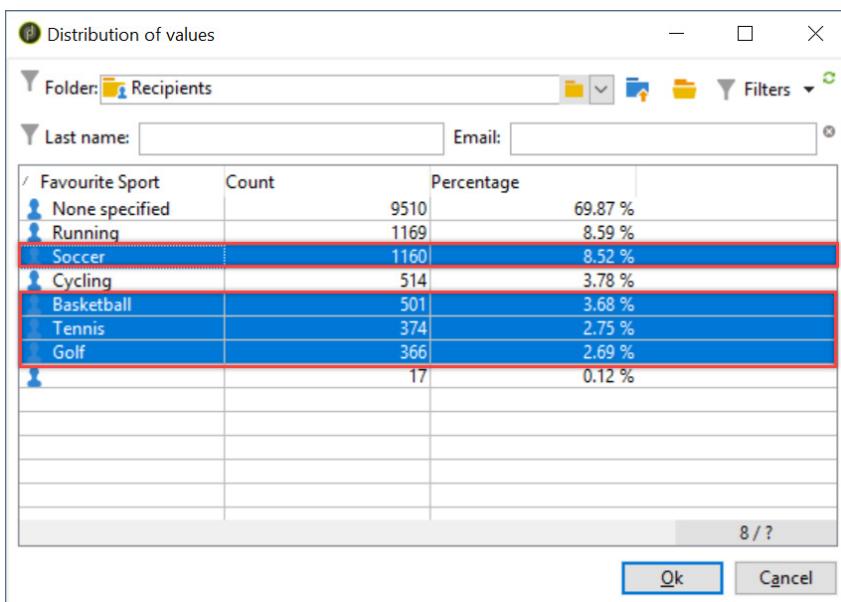
3. Click the **New** icon. The Application filter 'New' dialog box opens.
4. In the **Label** field, type **Ball sports\_<your initials>**. For example, type **Ball sports\_JS**, as shown:

The screenshot shows the 'Application filter 'New'' dialog box. The 'Label' field is highlighted with a red box and contains 'Ball sports\_JS'. The 'Internal name' field is 'FLT7'. The 'Document type' is set to 'Recipients'. The 'Filter conditions' section is empty. At the bottom are 'Save' and 'Cancel' buttons.

5. Click the area just below the **Expression** column. The **Expression** field is displayed.
6. Click the **Edit expression** icon in the new field. The **Select an expression** dialog box opens.
7. Select **Favourite Sport**.
8. Click **Finish**. The expression is added to the field.
9. Click the **Operator** drop-down arrow and select **is included in** from the drop-down list.
10. Click the **Value** field and select the **Distribution of values** icon, as shown. The **Distribution of values** dialog box opens.

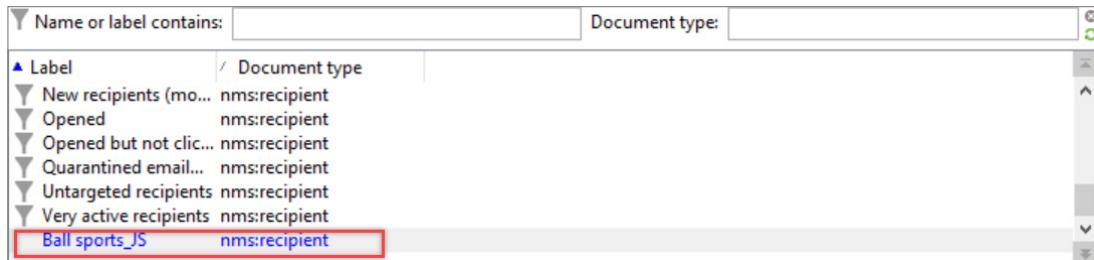


11. Press the **Ctrl** key and select **Soccer, Basketball, Tennis, and Golf**, as shown:



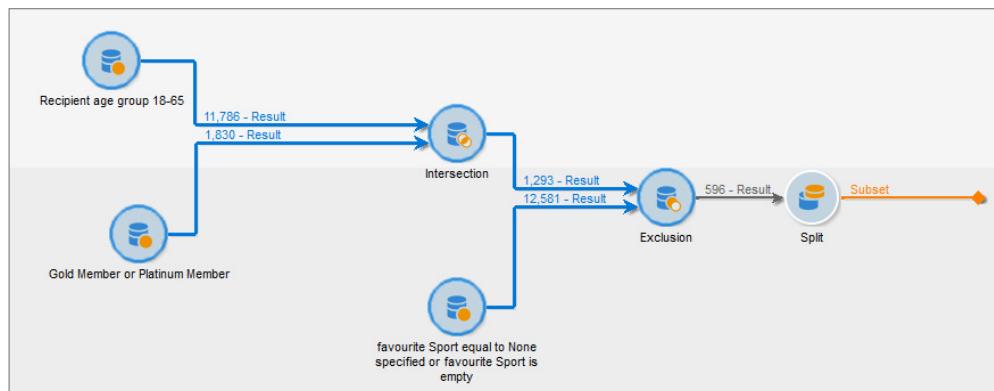
12. Click **Ok** to go back to the Application filter Ball sports dialog box.

13. Click **Save** to save the filter, as shown:

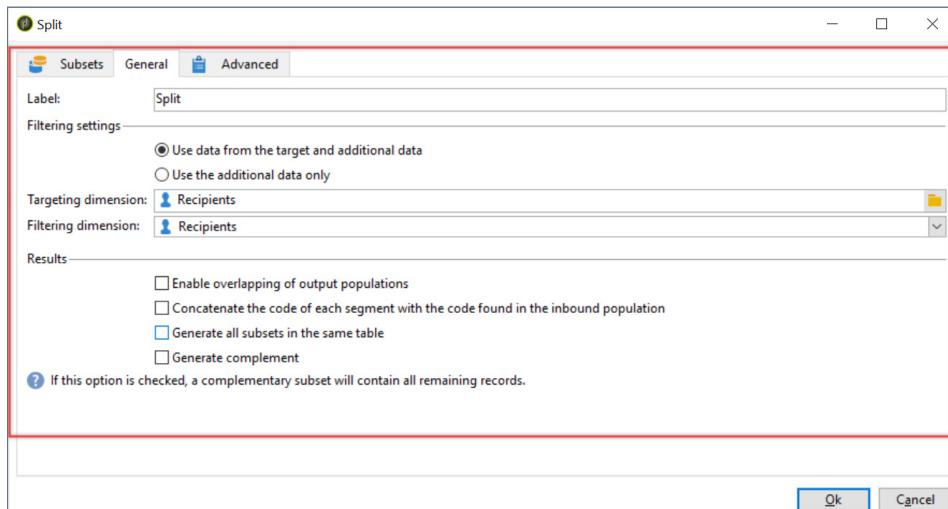


Task 3: Identify the recipients who play ball sports and who do not play ball sports

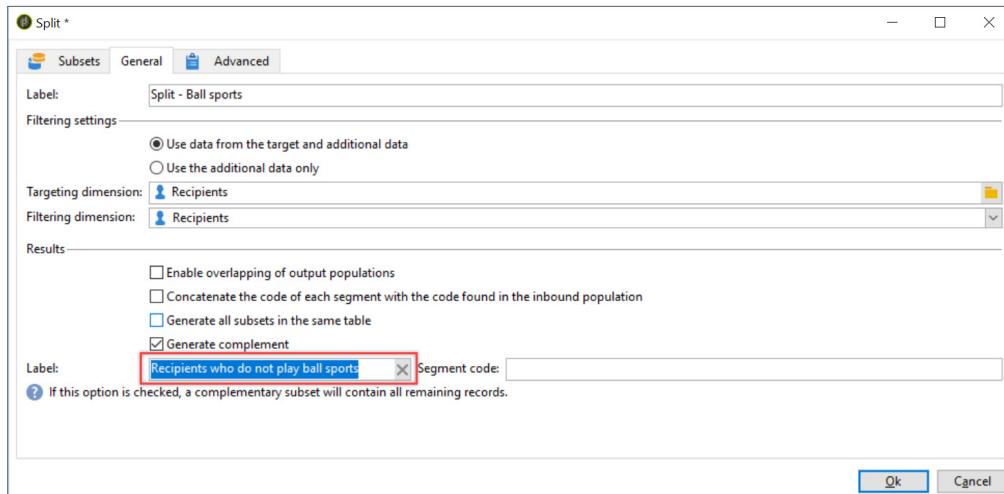
1. Open the **Ball sports Campaign\_<your initials>** that you created earlier. If it is not open, click the **Targeting and workflows** tab.
2. Drag a **Split** onto the workflow and join it with the transition line from the **Exclusion** activity, as shown:



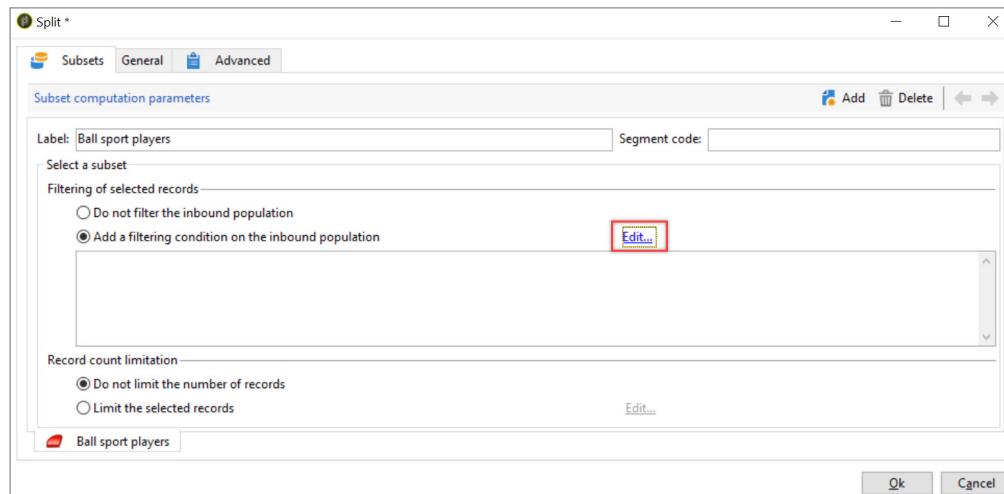
3. Double-click the **Split** activity. The **Split** dialog box opens.
4. Click the **General** tab. The available options are available, as shown:



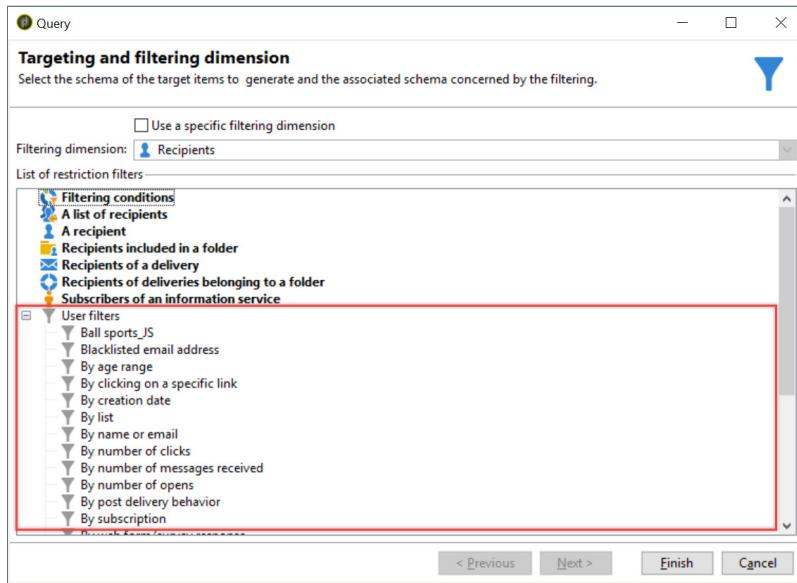
- In the **Label** field, type **Split - Ball sports**.
- In the **Results** section, select the **Generate complement** checkbox. The **Results** section is updated based on the selection.
- In the new **Label** field that results from selecting the **Generate complement** option, type **Recipients who do not play ball sports**, as shown:



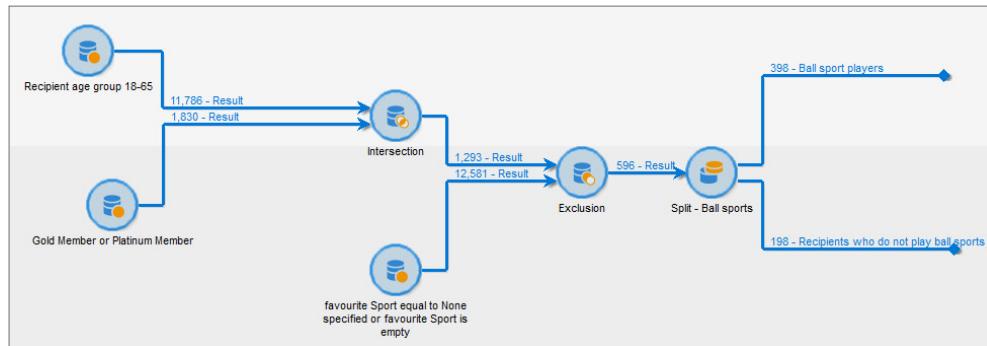
- Click the **Subsets** tab. The available options are displayed.
- In the **Label** field, type **Ball sport players**.
- Select **Add a filtering condition on the inbound population** and click **Edit**, as shown. The **Query dialog box** opens.



11. In the **List of restriction filters** section, expand **User filters**. The available filters are displayed, as shown:



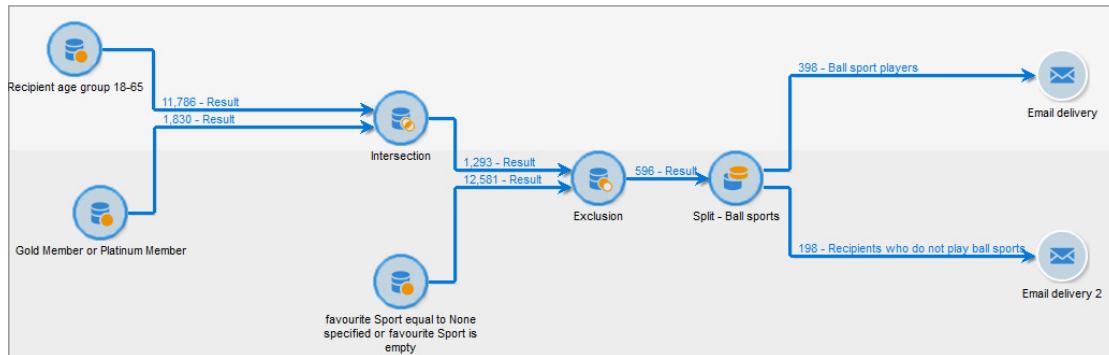
12. Select the filter that you created. For example, select **Ball sports\_JS**.
13. Click **Finish** to go back to the **Split** dialog box.
14. Click **Ok** to close the **Split** dialog box.
15. Click **Save** to save the updated workflow.
16. Click the **Restart** icon. A prompt is displayed.
17. Click **Yes** to start the workflow from the beginning. The workflow starts and generates the results, as shown:



18. Click the **Stop** icon. A prompt is displayed.
19. Click **Yes** to stop the workflow.

## Task 4: Configure and execute the Email deliveries

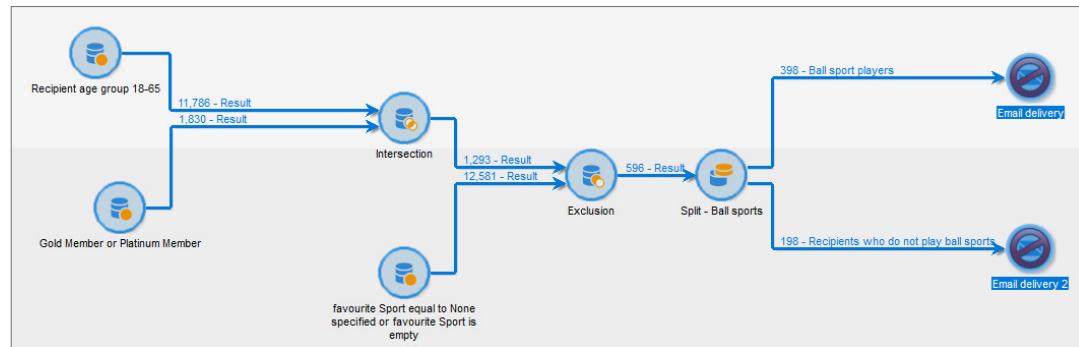
1. Drag two **Email deliveries** from the **Deliveries** palette and join each of them with the transition lines for the **Split** activity, as shown:



2. Click **Save** to save the workflow.
3. Right-click each **Email delivery** and select **Do not enable**.

**Note:** Selecting **Do not enable** provides a safety net to avoid processing a delivery if you accidentally click the **Start** button. You can enable the **Email delivery** activity when you want to start the workflow to send the deliveries.

4. Click **Save** to save the workflow, as shown:

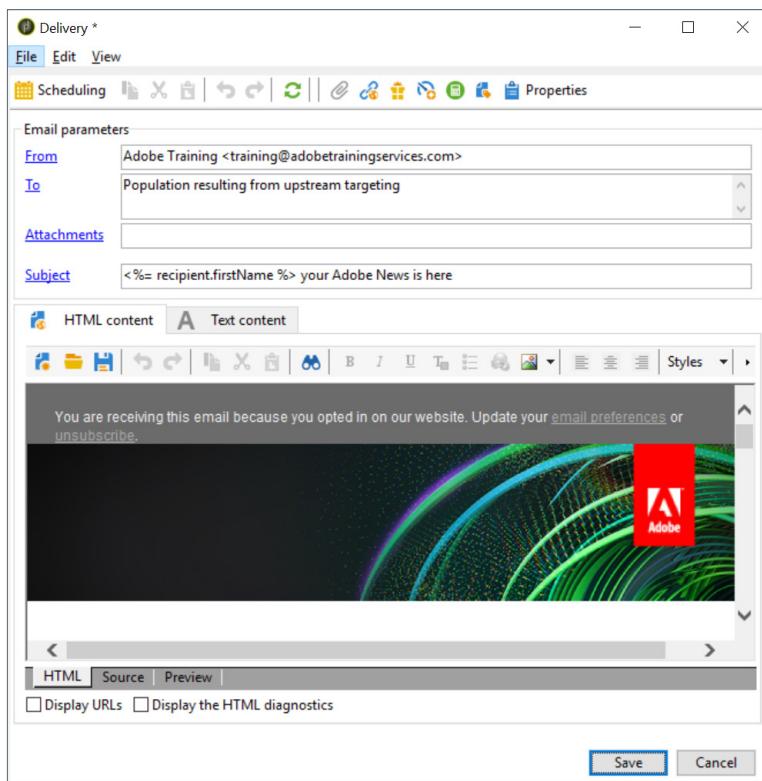


5. Double-click the **Email delivery** activity that connects to the **Ball sport players** transition line.
6. Click the **Delivery template** drop-down arrow and select the **ADOBE\_NEWSLETTER (ADOBE\_NEWSLETTER)** template.

**Note:** The template is selected for demonstration purposes only. You will not make changes to the contents of the mail except for the Subject line. You can select any template and personalize the template as per your business requirement.

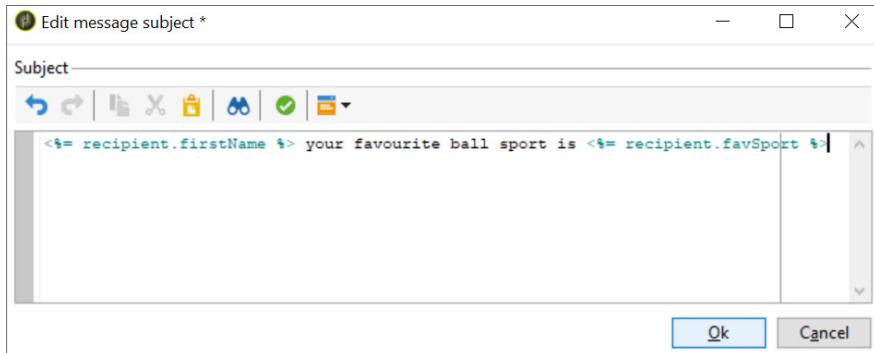
7. In the **Label** field, type **Ball\_Sport\_Players\_<your initials>**. For example, **Ball\_Sport\_Players\_JS**.

8. Click **Continue** to display the mail content, as shown:

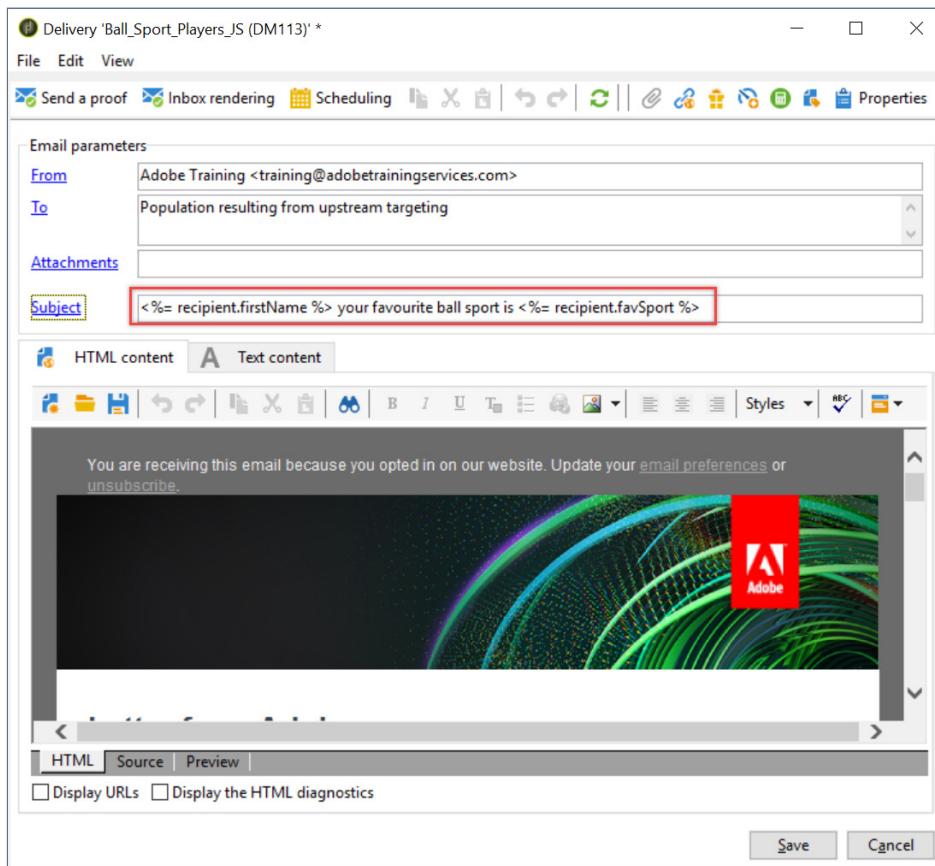


9. Click **Save** to save the email delivery.
10. Click **Save** to save the workflow.
11. Click the **Dashboard** tab to view the deliveries.
12. Click **Open** to open the **Ball\_Sport\_Players\_<your initials>** delivery. The Delivery dialog box opens.
13. Click the **Subject** link. The **Edit message subject** dialog box opens.
14. Delete **your Adobe News is here** and add a comma after **<%= recipient.firstName %>**.
15. Press the spacebar key and type: **your favourite ball sport is**.
16. Press the spacebar key again and click the **Insert content** icon.
17. Select **Recipients > Other**. The **Selection of a field of the target** dialog box opens.

18. Select **Favourite Sport** and click **Ok**. The new entry is added to the **Edit message subject** dialog box, as shown:

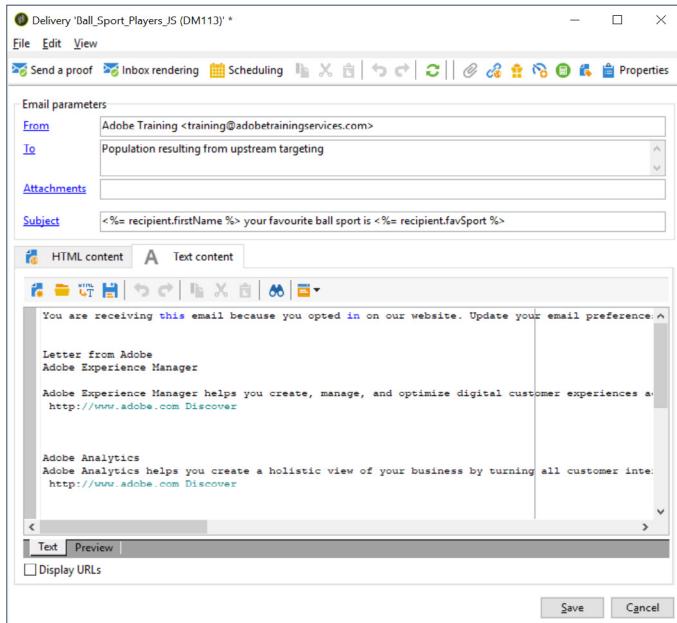


19. Click **Ok** to add the content to the **Subject** field of the Delivery dialog box, as shown:



20. Click the **Text content** tab to view the text version of the mail.

21. Click the **Import HTML** icon, as shown. A prompt will be displayed. Click **Yes** to confirm the action. The text content is generated.



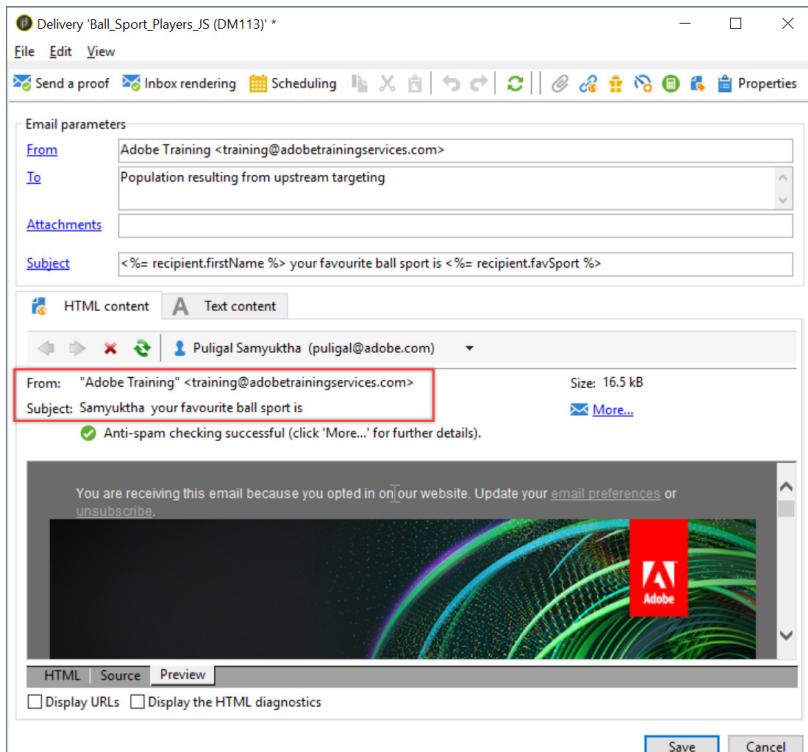
22. Click the **HTML content** tab and then click **Preview** to preview the HTML version of the message body.

23. Click **Test personalization > Recipient**. The **Select a recipient** dialog box opens. Alternately, you can also select recipients from the **Test personalization** drop-down list, if any recipient name is available.

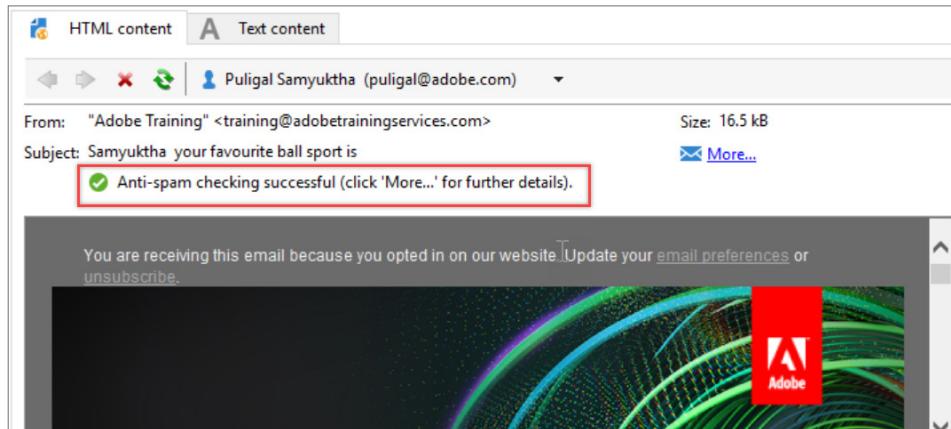
24. In the **Folder** field, click the drop-down arrow and select **Recipients > Training**.

25. Select any recipient from the list of recipients and then click **Ok**.

26. Verify the preview displays the name of the recipient you selected, as shown:



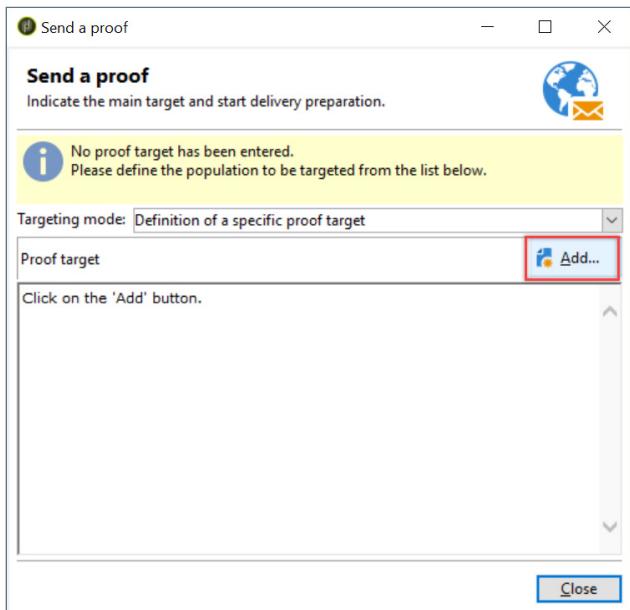
27. Verify that the Anti-spam checking is successful, as shown:



If not, you can click the **More** link. The **Preview results** dialog box opens. Click the **Anti-spam checking** tab and review the reason why the email is identified as spam and then click **Close** to go back to the **Delivery** dialog box.

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

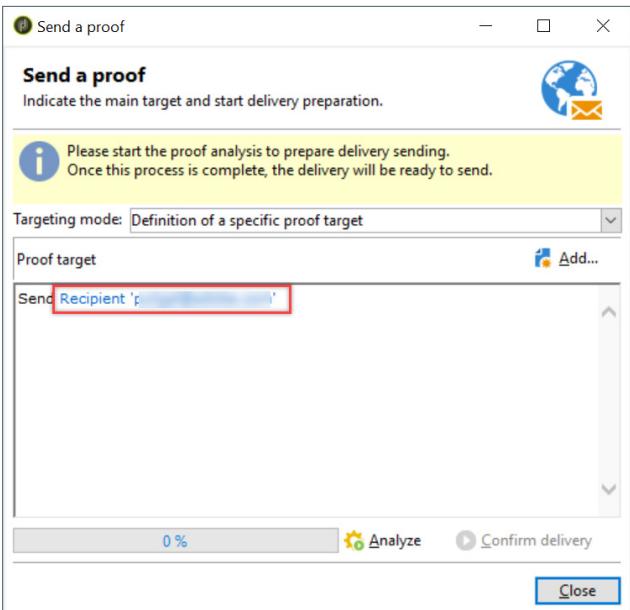
29. Click **Add**, as shown: The **Select target element** dialog box opens.



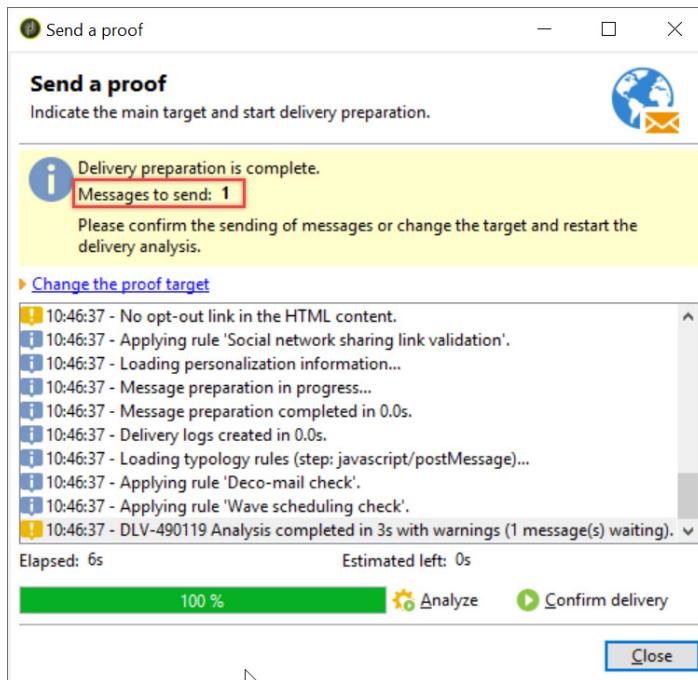
30. Select **A recipient** and click **Next**. The **Target element** page opens.

31. In the **Folder** field, click the drop-down arrow and, if not already selected, select **Recipients > Training**.

32. Select your profile and then click **Finish**. Your recipient profile is added to the **Send a proof** dialog box, as shown:



33. Click **Analyze**. The proof is analyzed and the progress bar displays 100% when the analysis is complete. The **Send a proof** dialog box displays the number of messages to send, as shown:



34. Click **Confirm delivery** to send the proof delivery. A prompt is displayed.

35. Click **Yes** to confirm the action. You will receive an email in the Inbox that belongs to the registered email ID.

36. Click **Close** to go back to the Delivery dialog box.

37. Click **Close** to close the Delivery dialog box. If you have made any changes to the content, you can click **Save**.

38. Click the **Targeting and workflows** tab to go back to the workflow.

39. Double-click **Email delivery 2**. The **Delivery** dialog box opens.

40. Click the **Delivery template** drop-down arrow and select the **ADOBE\_NEWSLETTER (ADOBE\_NEWSLETTER)** template.

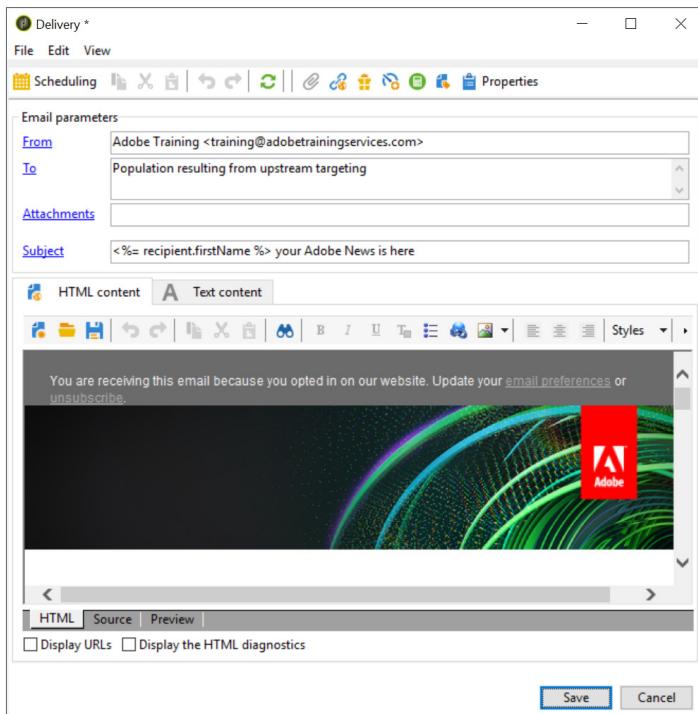
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 **Note:** The template is selected for demonstration purposes only. You will not make changes to the contents of the mail except for the Subject line. You can select any template and personalize the template as per your business requirement.

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41. In the **Label** field, type **Non\_Ball\_Sport\_Players\_<your initials>**. For example, **Non\_Ball\_Sport\_Players\_JS**.

42. Click **Continue** to display the mail content, as shown:



43. Click **Save** to save the email delivery.

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

45. Click the **Dashboard** tab to view the deliveries.

46. Click the **Non\_Ball\_Sport\_Players\_<your initials>** delivery and click **Open**.

47. Click the **Subject** link. The **Edit message subject** dialog box opens.

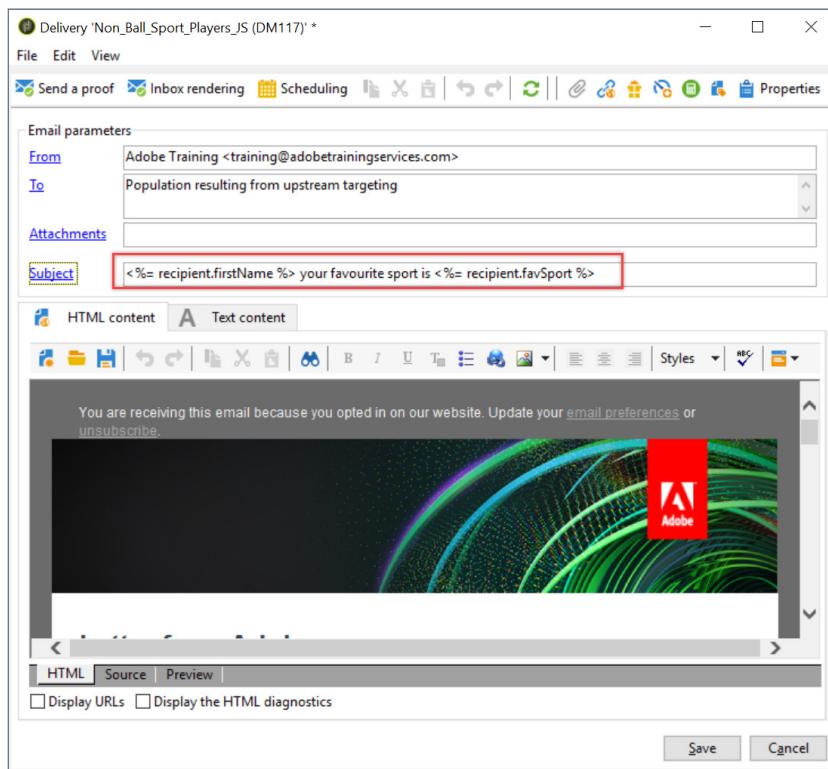
48. Delete **your Adobe News is here** and add a comma after **<%= recipient.firstName %>**.

49. Press the spacebar key and type **your favourite sport is**.

50. Press the spacebar key and click the **Insert content** icon.

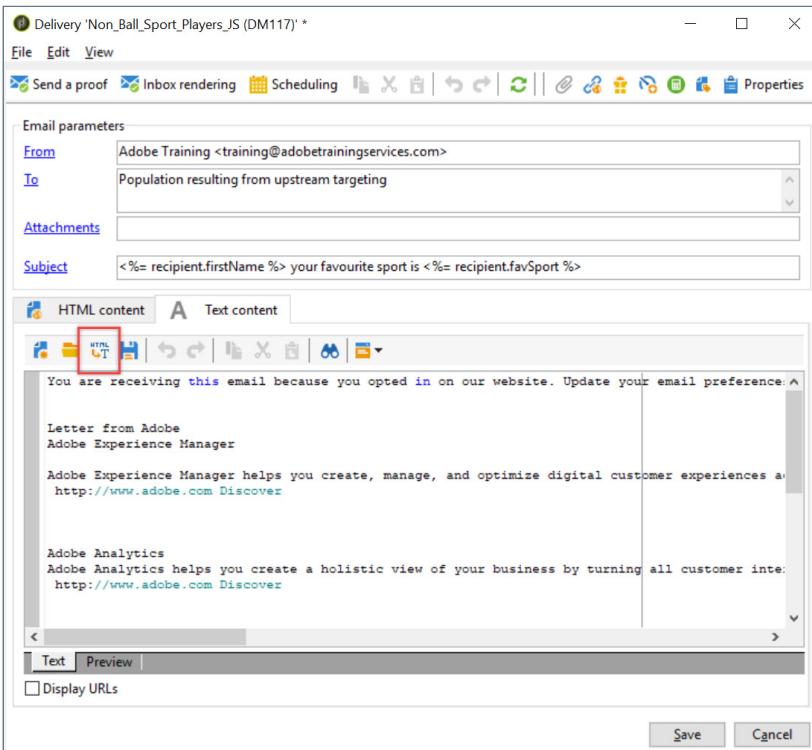
51. Select **Recipients > Favourite Sport**. The new entry is added to the **Edit message subject** dialog box.

52. Click **Ok** to add the content to the **Subject** field of the **Delivery** dialog box, as shown:

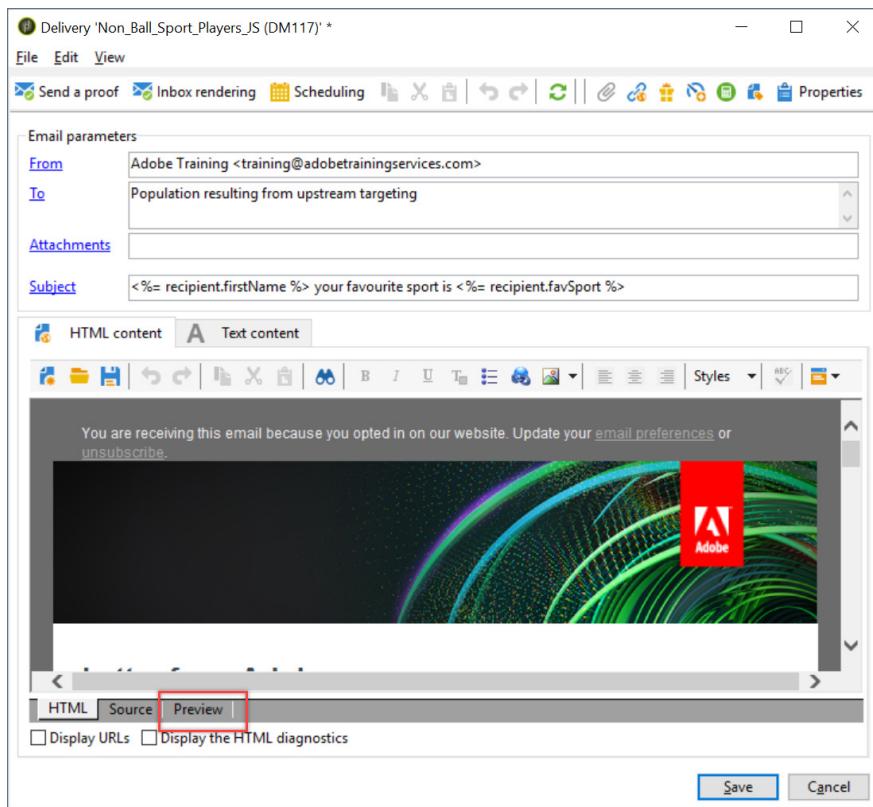


53. Click the **Text content** tab.

54. Click the **Import HTML** icon, as shown. A prompt will be displayed. Click **Yes** to confirm the action. The text content is generated.



55. Click the **HTML content** tab and then click **Preview**, as shown, to preview the HTML version of the message body.

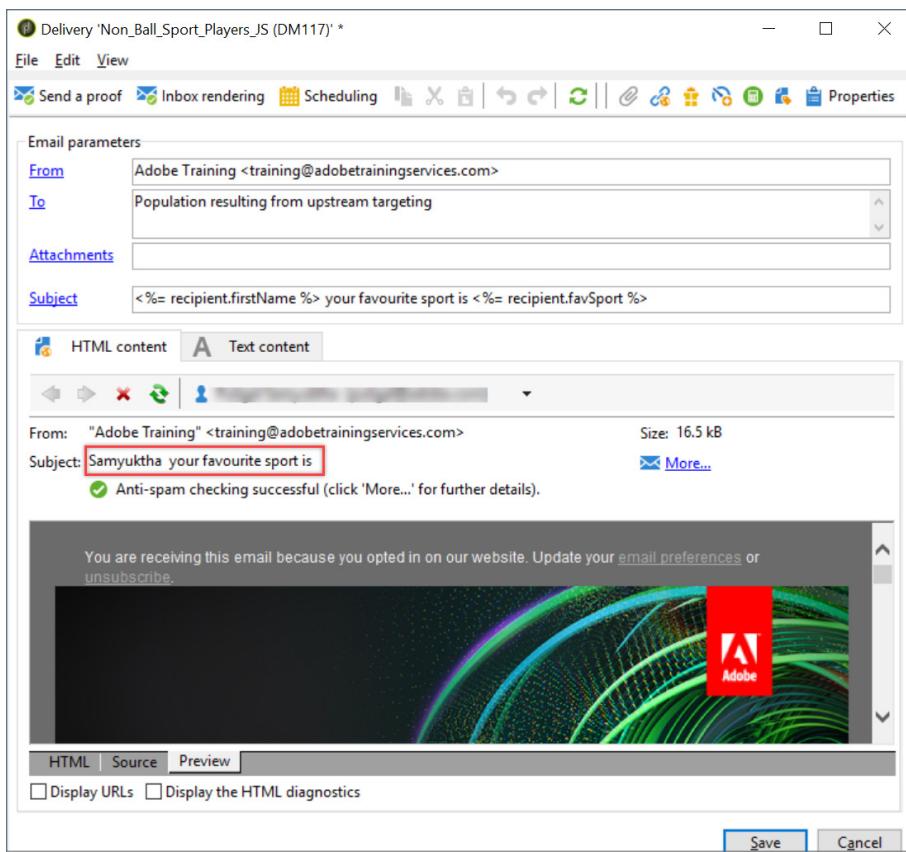


56. Click **Test personalization > Recipient**. The **Select a recipient** dialog box opens. Alternately, you can also select recipients from the **Test personalization** drop-down list, if any recipient name is available.

57. In the **Folder** field, click the drop-down arrow and select **Recipients > Training**.

58. Select any recipient from the list of recipients and then click **Ok**.

59. Verify the preview displays the name of the recipient you selected, as shown:

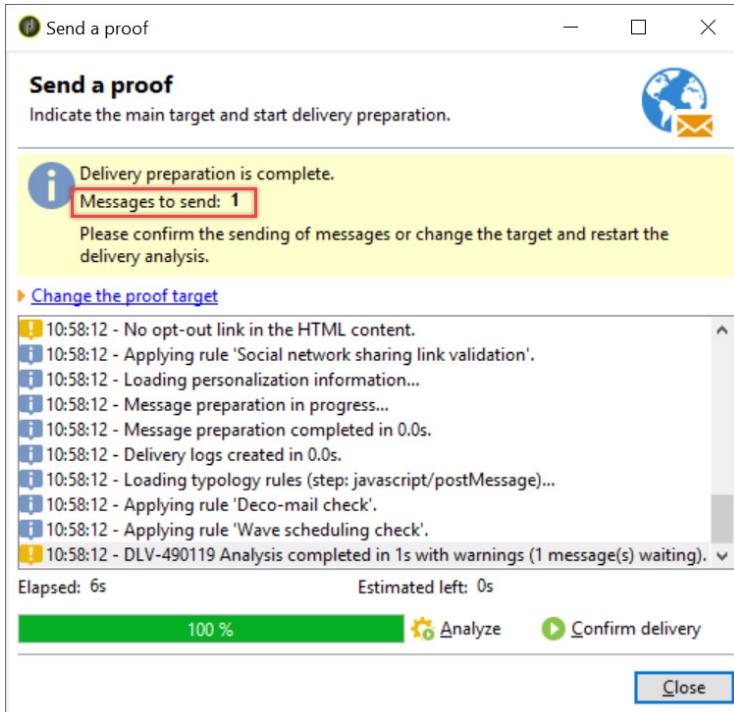


60. Verify that the **Anti-spam checking** is successful.

If not, you can click the **More** link. The **Preview results** dialog box opens. Click the **Anti-spam checking** tab and review the reason why the email is identified as spam and then click **Close** to go back to the **Delivery** dialog box.

61. Click **Send a proof**. The **Send a proof** dialog box opens.
62. Click **Add**. The **Select target element** dialog box opens.
63. Select **A recipient** and click **Next**. The **Target element** page opens.
64. In the **Folder** field, click the drop-down arrow and select **Recipients > Training**.
65. Select your profile and then click **Finish**. The recipient profile is added to the **Send a proof** dialog box.

66. Click **Analyze**. The proof is analyzed and the progress bar displays 100% when the analysis is complete. The **Send a proof** dialog box displays the number of messages to send, as shown:



67. Click **Confirm delivery** to send the proof delivery. A prompt is displayed.

68. Click **Yes** to confirm the action. You will receive an email in the registered email id.

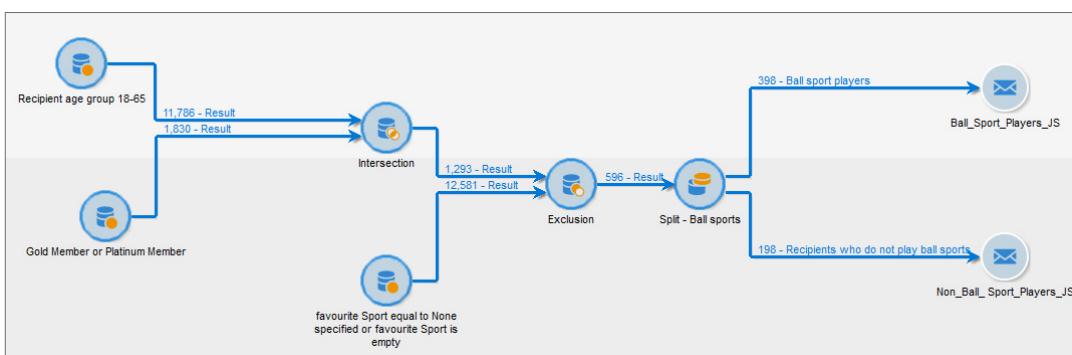
69. Click **Close** to go back to the **Delivery** dialog box.

70. Click **Close** to close the **Delivery** dialog box. You can click **Save** if you have made any changes to the content to close the **Delivery** dialog box.

71. Click the **Targeting and workflows** tab to go back to the workflow.

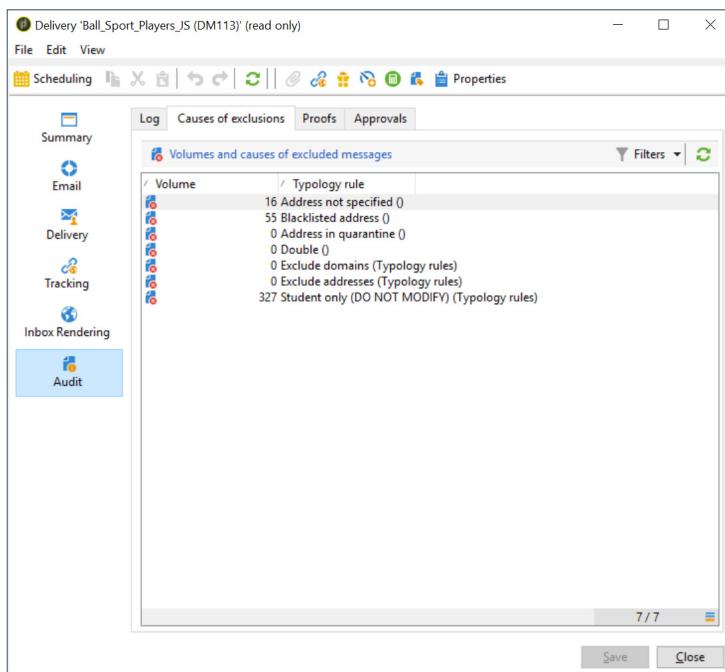
72. Right-click each email delivery and then select **Normal execution**.

73. Click **Save** to save the workflow, as shown:



74. Click the **Start** icon to start the workflow. The Email deliveries starts to blink. This means that they are waiting for confirmation.
75. Click the **Dashboard** tab to view the deliveries.
76. Click the **Ball\_Sport\_Players\_<your initials>** email delivery and click **Approval** drop-down and select **Approve content**. A prompt is displayed.
77. Click **Content approval** button in the opened window.
78. Click **Ball\_Sport\_Players\_<your initials>** email delivery and click **Approve targeting**.
79. Click **Target approval** button in the opened window.
80. Click the **Ball\_Sport\_Players\_<your initials>** email delivery and click **Confirm delivery**. A prompt is displayed.
81. Click **Yes** to confirm the action. The delivery starts, and the recipients will receive an email in their registered email id.
82. Repeat steps 76 to 81 for the **Non\_Ball\_Sport\_Players\_<your initials>** email delivery
83. Click the **Ball\_Sport\_Players\_<your initials>** email delivery and click **Open**. The Delivery dialog box opens.
84. Click the **Audit** tab. You will see the logs of the delivery.

85. Click the **Causes of exclusions** tab to view the exclusions, as shown:



86. Click the **Non\_ball\_Sport\_Players\_<your initials>** email delivery and click **Open**. The Delivery dialog box opens.

87. Click the **Audit** tab. You will see the logs of the delivery.

88. Click the **Causes of exclusions** tab to view the exclusions, as shown:

The screenshot shows the 'Delivery Non\_Ball\_Sport\_Players\_JS (DM117)' dialog box. The left sidebar has tabs for Summary, Email, Delivery, Tracking, Inbox Rendering, and Audit, with Audit selected. The main area has tabs for Log, Causes of exclusions, Proofs, and Approvals, with Causes of exclusions selected. A sub-tab 'Volumes and causes of excluded messages' is also visible. The central pane displays a table of exclusion causes:

/ Volume	/ Typology rule
5 Address not specified ()	
20 Blacklisted address ()	
0 Address in quarantine ()	
0 Double ()	
0 Exclude domains (Typology rules)	
0 Exclude addresses (Typology rules)	
173 Student only (DO NOT MODIFY) (Typology rules)	

At the bottom right are 'Save' and 'Close' buttons, and a status bar showing '7 / 7'.

89. Click **Close** to close the **Delivery** dialog box.

# Troubleshooting Issues in Campaign Classic

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A business user may encounter the following issues while using Campaign Classic:

- Console-related issues
- Content delivery-related issues
- Workflows-related issues

## Console-Related Issues

Different issues that can occur in the Campaign Classic client console are:

- Display issues within the console
- Inconsistencies in the user interface (UI) for different users
- Persistent error messages no matter where you clicked within the console
- Issue with refreshing the content

The best practices to troubleshoot the issues related to console are:

- Refresh the Campaign Classic client console by clicking the Refresh button or the F5 key.
- Clear the local cache.
- Clear the browser cache.
- Reinstall the Campaign Classic client console.
- Upgrade the Campaign Classic client console

## Content Delivery-Related Issues

The common issues related to delivery are:

- Typology rule issues
- Target segmentation issues
- Image display issues
- Campaign validity issues
- Delivery performance issues

## **Typology Rule Issues**

Typology rules prevent the sending of deliveries that are missing certain elements and also block deliveries to certain recipients based on the pressure rules. The best practices to troubleshoot issues related to typology rules are:

- Ensure you have admin rights to troubleshoot the typology rules.
- Determine the order in which the rules were executed.
- Access the Audit tab and filter the audit log by the 'log type equal to Info' expression and then again by 'log type equal to error' expression to view the information of the delivery execution.
- Access the Audit tab and verify the Causes of exclusions tab to check the number of recipients who are excluded from receiving the delivery and the reason for exclusion.

## **Target Segmentation Issues**

The best practices to troubleshoot issues related to target segmentation are:

- Check the results of a target several times before you execute the delivery.
- Perform target approvals to ensure that a second person (at least) approves the target.
- Disable the delivery placed after the Query activity and check the results.
- Send a proof from the target to check personalization.
- Ensure multiple filters/queries do not re-add recipients.

## **Image Display Issues**

Often, images may not be displayed in the delivered content when you send a delivery. The best practices to troubleshoot image display issues are:

- Ensure that the images are uploaded to the server when loaded from a local file.
- Ensure that the images are not moved to duplicate tracking servers.
- Ensure that images are uploaded to the resources folder if they are not available in the public resources folder.
- Send a proof to verify the images, and verify that the images are uploading without errors when the proofs are sent
- Validate whether the resources configuration in the instance setup is correct.

## **Campaign Validity Issues**

Campaigns and deliveries are managed according to dates. The best practices to troubleshoot issues related to the validity of a campaign are:

- Check the contact date against the validity span.
- Check the wave timeline against the validity date.
- Check the contact date of any delivery that is not started.

- Check the contact date when checking the statistics and verify whether the retries were terminated due to expiration of the delivery.

## **Delivery Performance Issues**

The delivery performance of your campaign is affected by many factors, such as campaign size, target, and overall platform load. The best practices to troubleshoot issues related to the delivery performance are:

- Split campaign into smaller deliveries if the target is greater than 7 million.
- Do not use old campaigns to target new populations as it can impact reports.
- Stop the workflow if you observe a delivery is experiencing a significantly higher error rate due to issues with the data.
- Preview deliveries to identify any HTML error issue before deploying the deliveries.
- Do not analyze deliveries with the final target multiple times. You should only analyze the final target after proofing is done. If there is a legitimate need to analyze a second time, you need to re-create the campaign.
- Stop a workflow before you delete the workflow.
- Restart the workflow if there is a change in the contact date or anything related to the delivery
- Do not keep workflows paused or in a failed state in the production environment.
- Do not create ad-hoc reporting, especially on delivery logs. For any reporting aspects, please route those questions to Development teams and/or to Business teams.

## **Workflows-Related Issues**

If a workflow fails:

1. Check the workflow journal.
2. Monitor technical workflows.
3. Look for failures on the individual workflow activities.

If a workflow pauses:

4. Start the workflow. If it runs, the workflow is executed successfully.
5. If the workflow execution fails again, try to restart the workflow.
6. If the workflow restart fails, check the workflow journal.

**Example:** An employee managing the campaigns created in the organization leaves the organization. It was reported that after the employee left the organization, some key campaigns and workflows were not triggering/running. The reason for the issue was that the employee who left the organization owned campaigns/workflows and after the employee's ID was disabled, Campaign Classic could not identify the owner.

**Resolution:** Identify the workflows/campaign that were not triggering/running and configure them to restart from a user that is not disabled in the system.

## Module 4

# Send Recurring and Retargeting Campaigns

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## Introduction

In the digital marketing age, it is important for you to constantly engage the customers with your brand. Apart from marketing campaigns, you should be able to maintain personal rapport with your regular customers. For example, you should send them personalized messages on special occasions such as wishing them Happy Birthday on their birthday. Adobe Campaign Classic enables you to easily create recurring campaigns for your customers.

However, sometimes when you send campaign deliveries to customers, you need to follow-up with your customers if they fail to respond to your deliveries. Campaign Classic enables you to create retargeting campaigns that will enable you to retarget the recipients of a delivery and increase the conversion rates from the customers.

## Objectives

After completing this module, you will be able to:

- Explain recurring and retargeting campaigns
- Create a birthday campaign
- Create a recurring birthday campaign
- Create a retargeting campaign

## Recurring and Retargeting Campaigns

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Recurring campaigns are campaigns that are delivered on a recurring basis. The deliveries with personalization are sent to recipients at specific intervals.

Retargeting campaigns are campaigns that are used to target a previously targeted population. These campaigns are used to:

- Send messages to the recipients based on their activities on your websites
- Follow-up based on the reactions of the customers to your campaigns
- Increase customer retention

# Exercise 1: Create a birthday campaign

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**Scenario:** You are the marketing associate of We.Retail. You want to create single-use birthday campaigns to send to your customers on their birthday, so that your customers are more engaged with your brand. You will also create a predefined birthday filter and a birthday template that your teammates can use in the future to send birthday emails.

This exercise includes the following tasks:

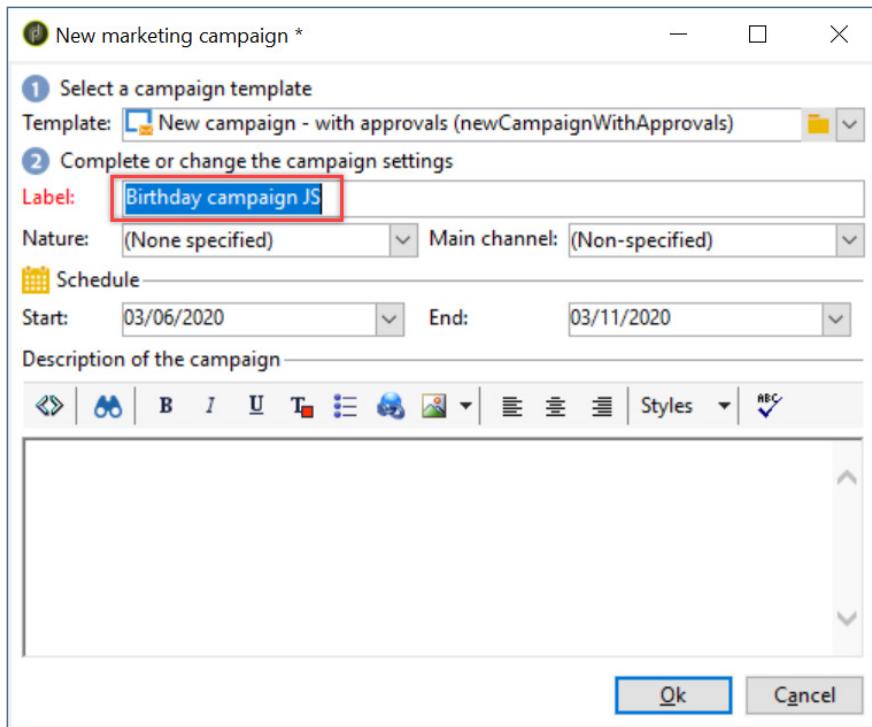
1. Create a single-use birthday campaign
2. Configure the predefined filters for the campaign
3. Create a delivery template for the campaign
4. Create the campaign workflow
5. Approve deliveries and execute the campaign

## Task 1: Create a single-use birthday campaign

In this task, you will create a birthday campaign, assign reviewers, and customize the operator's profile.

1. On the **Home** page, click **Explorer**.
2. In the Explorer view, click **Campaign Management > Campaigns**. The available campaigns are displayed in the list view.
3. Click the **New** icon. The **New marketing campaign** dialog box opens.
4. In the **Template** field, click the drop-down arrow and select the **New campaign - with approvals (newCampaignWithApprovals)** template.

5. In the **Label** field, type **Birthday campaign <your initials>**, as shown. For example, **Birthday campaign JS**.

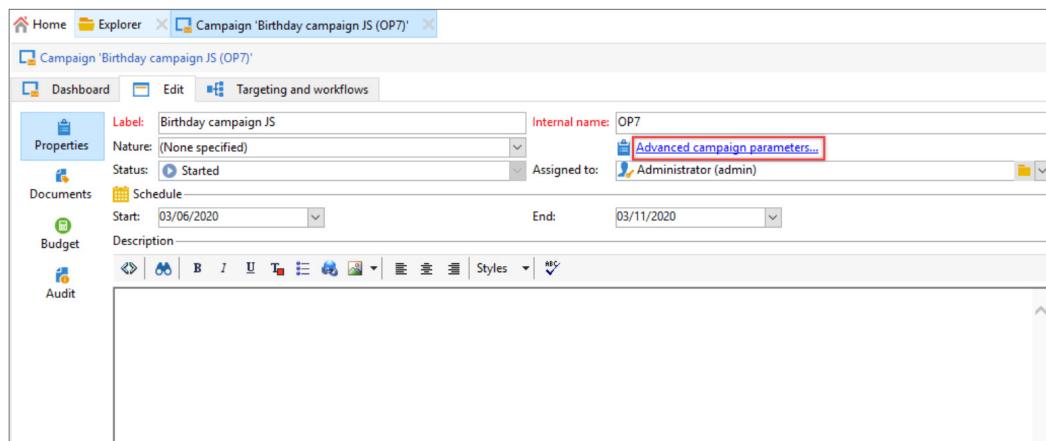


6. Click **Ok**. The campaign is created and added to the list view, as shown:

Campaigns (By name, label, nature or status)			
Label:	Internal name:	Filters	
Nature:	Status:	(No value)	
/ Campaigns	/ Status	/ Start	/ End
▶ Membership campai...	Started	03/06/2020	03/11/2020
▶ Autumn sale offers...	Started	03/05/2020	03/10/2020
▶ Ball sports campaign...	Started	03/06/2020	03/11/2020
▶ Birthday campaign...	Started	03/06/2020	03/11/2020

7. Double-click the **Birthday campaign <your initials>** campaign. The campaign opens on a separate tab.
8. Click the **Edit** tab. Ensure your profile is updated in the **Assigned to** field. If it is not updated, click the drop-down arrow and select the profile you added in the **Operator** folder. Click **Save** in the upper right to save the changes.

9. Click **Advanced campaign parameters**, as shown. The **Advanced settings** dialog box opens.

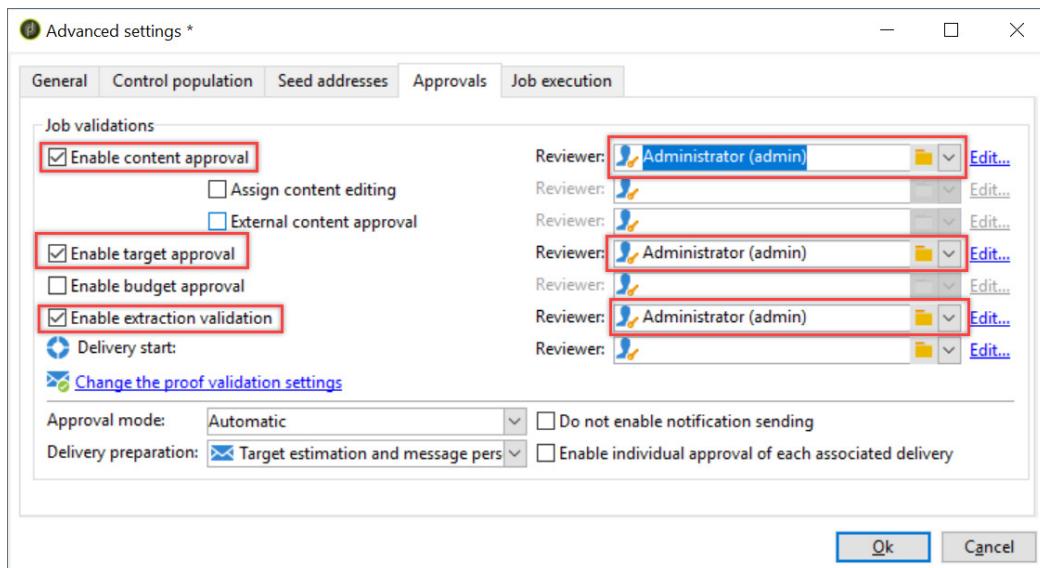


10. Click the **Approvals** tab. The available options are displayed.

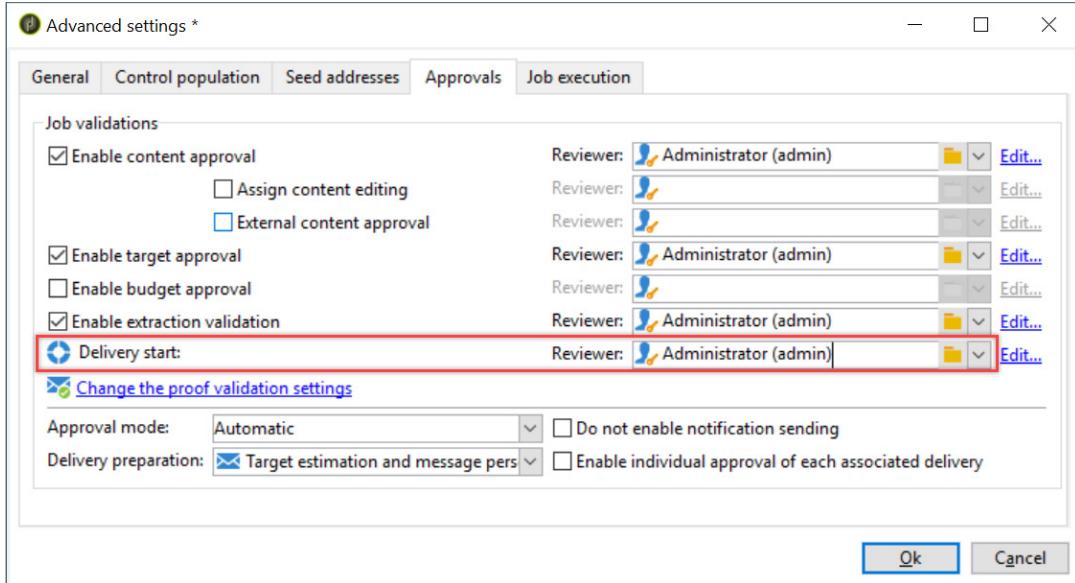
11. Ensure the following checkboxes are selected:

- › **Enable content approval**
- › **Enable target approval**
- › **Enable extraction validation** (this is for Direct mail deliveries only)

12. Assign a reviewer for each of the approvals you selected in the previous step. You can click the drop-down arrow in the respective field and select your profile, as shown:



13. Click the **Reviewer** drop-down arrow corresponding to **Delivery start** and select your profile, as shown:



14. Click **Ok** to close the **Advanced settings** dialog box.

15. Click **Save** to save the changes.

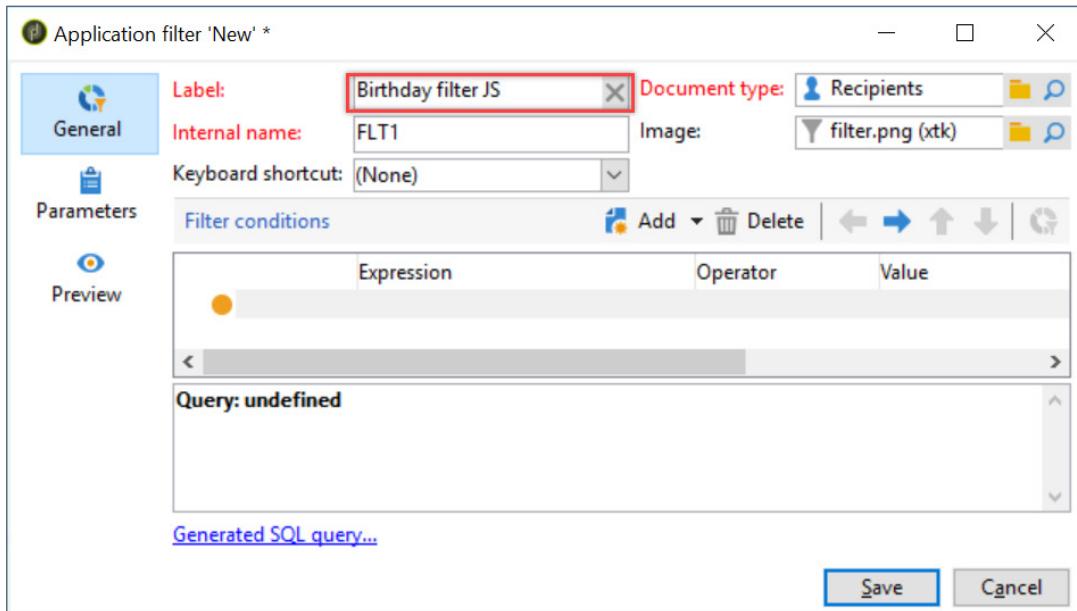
## Task 2: Configure the predefined filters for the campaign

1. Open the **Explorer** view and navigate to **Profiles and Targets > Predefined filters**. The available predefined filters are displayed in the list view, as shown:

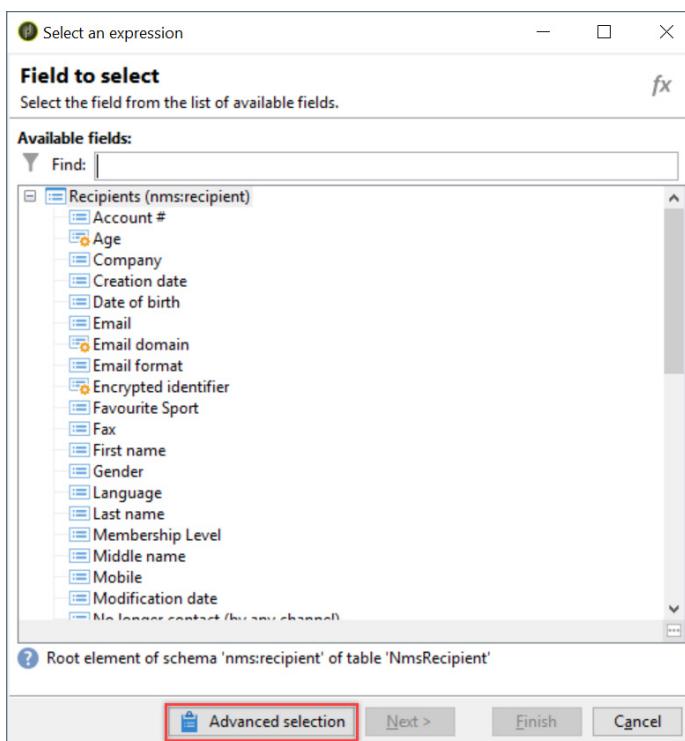
The screenshot shows the 'Predefined filters' list view in the Explorer view. On the left, there is a navigation tree with 'DEV' selected. In the main area, there is a search bar and a table of predefined filters. One filter, 'Blacklisted email address', is selected and highlighted with a red box. The table columns include 'Label', 'Document type', and a list of filter conditions. Below the table, there is a preview section for the selected filter.

2. Click the **New** icon. The **Application filter 'New'** dialog box opens.

3. In the **Label** field, type **Birthday filter <your initials>**. For example, type **Birthday filter JS**, as shown:



4. Click **Add** in the **Filter conditions** section. A new field is added to the **Expression** column.
5. Build an expression to extract the data for the Day of the birth date:
- In the **Expression** column, click the **Edit expression** icon. The **Select an expression** dialog box opens.
  - Click **Advanced selection** to build your own expression, as shown. The **Formula type** dialog box opens.



c. In the **Expression** section, select the **Edit the formula using an expression** option.

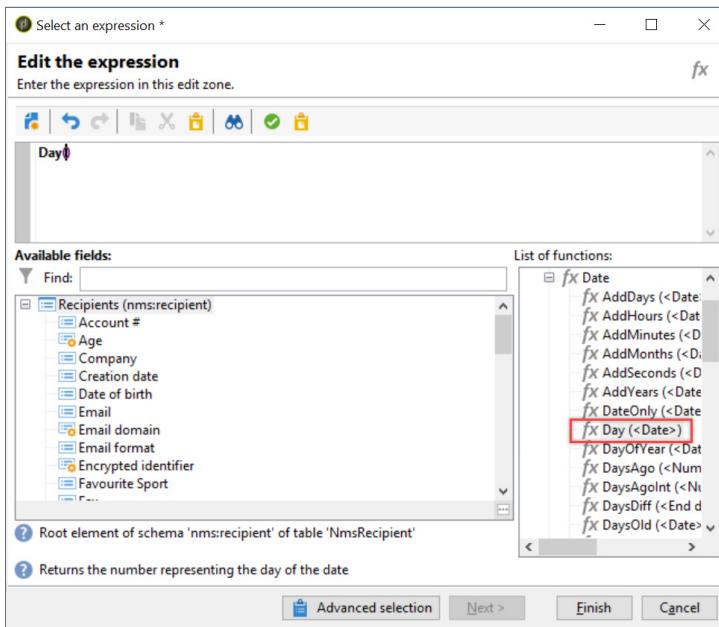
d. Click **Next**. The **Edit the expression** page opens.



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

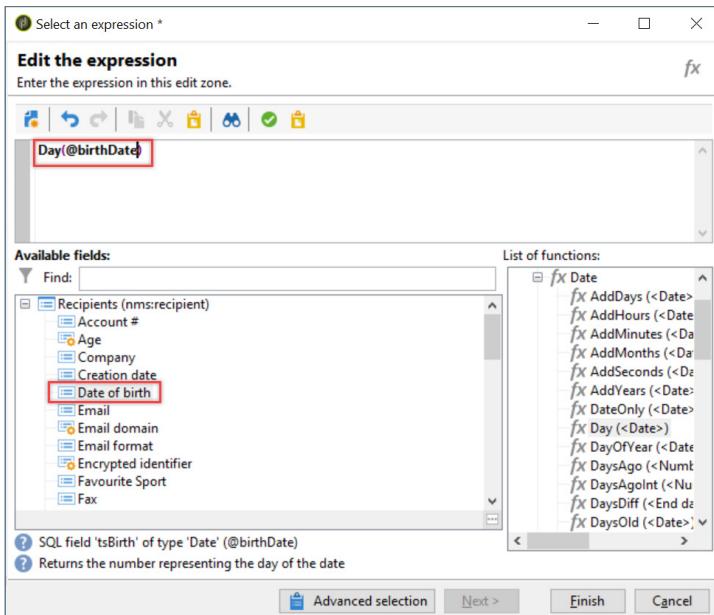
e. In the **List of Functions** section, expand **Date**.

f. Double-click **Day (<Date>)** to place the selected function in the edit zone, as shown:

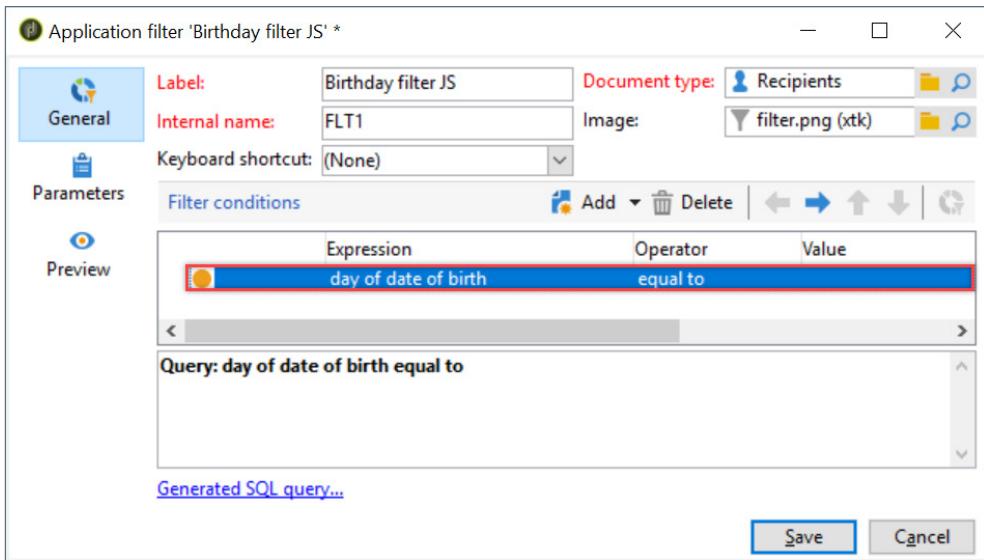


g. In the edit zone, place the cursor inside the () of the **Day()** expression.

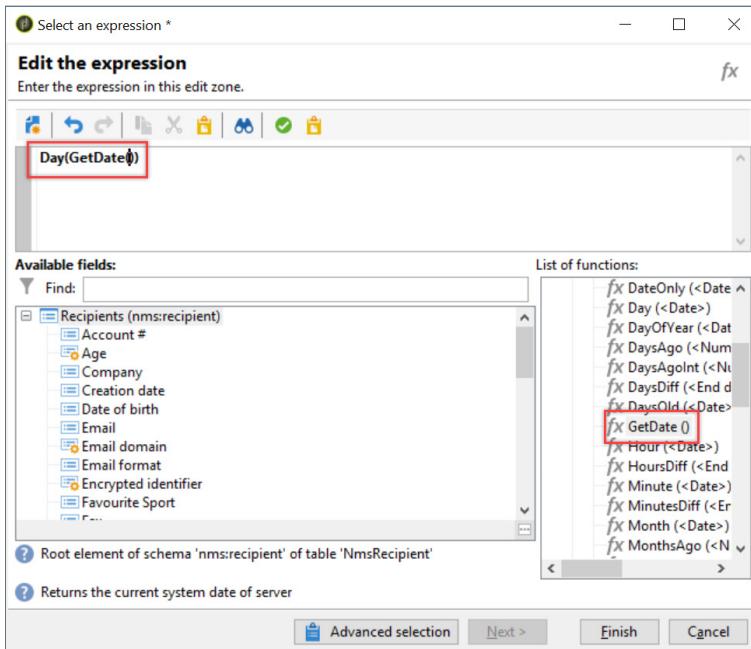
h. In the **Available fields** section, expand **Recipients (nms:recipient)** and double-click **Date of birth**. The expression in the edit zone is updated to **Day(@birthDate)**, as shown:



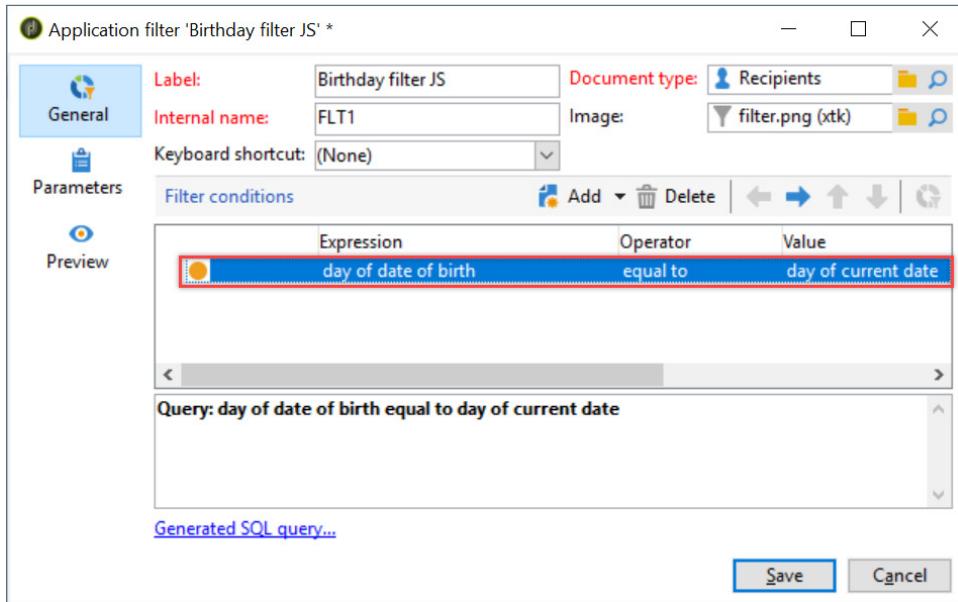
i. Click **Finish**. The expression is added to Application filter dialog box, as shown:



6. In the **Filter conditions** section, ensure that **equal to** is selected in the **Operator** field.
7. In the **Value** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.
8. In the **List of Functions** section, expand **Date**.
9. Double-click **Day (<Date>)** to place the selected function in the edit zone.
10. In the edit zone, place the cursor inside the () of the **Day()** expression.
11. In the **List of Functions** section, expand **Date** and select **GetDate()**. The expression is added to the edit zone, as shown:



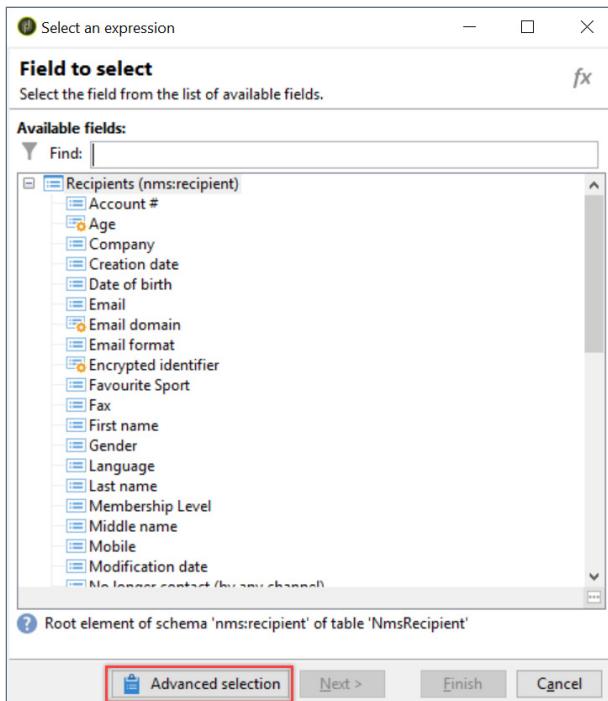
12. Click **Finish**. The **Value** field is updated, as shown:



13. In the **Filter conditions** section, click **Add** to create a new filter condition.

14. Build an expression to extract the data for the month of the birth date:

- In the **Expression** column, click the **Edit expression** icon. The **Select an expression** dialog box opens.
- Click **Advanced selection** to build your own expression, as shown. The **Formula type** dialog box opens.



- In the **Expression** section, select the **Edit the formula using an expression** option.

d. Click **Next**. The **Edit the expression** page opens.



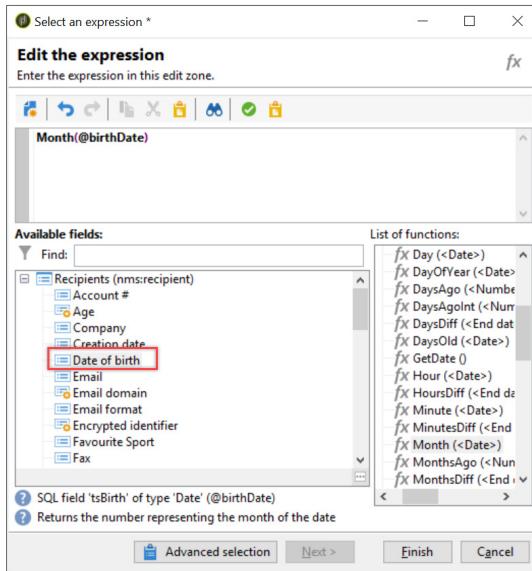
**Note:** You are now in the Function editor. Functions are listed on the right side of the screen and the fields of the recipients' table are on the left side.

e. In the **List of Functions** section, expand **Date**.

f. Double-click **Month (<Date>)** to place the selected function in the edit zone.

g. In the edit zone, place the cursor inside the () of the **Month()** expression.

h. In the **Available fields** section, expand **Recipients (nms:recipient)** and double-click **Date of birth**. The expression in the edit zone is updated to **Month(@birthDate)**, as shown:



i. Click **Finish**. The expression is added to Application filter dialog box.

15. In the **Filter conditions** section, ensure that **equal to** is selected in the second **Operator** field.

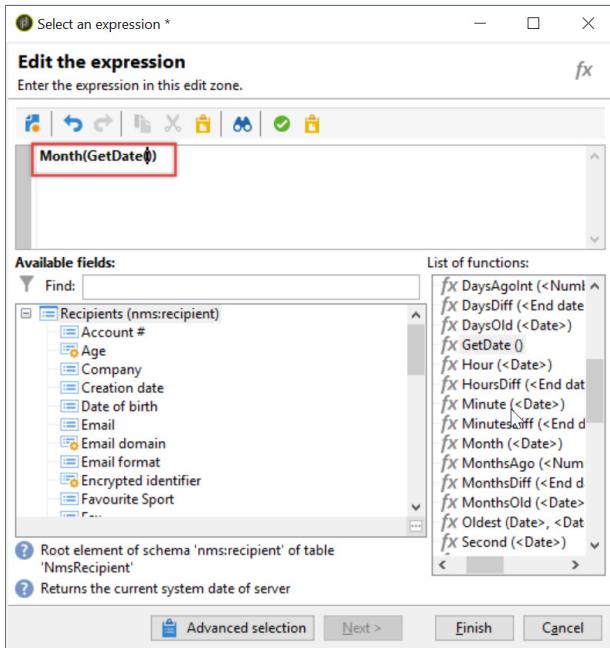
16. In the **Value** field, click the **Edit expression** icon. The **Select an expression** dialog box opens.

17. In the **List of Functions** section, expand **Date**.

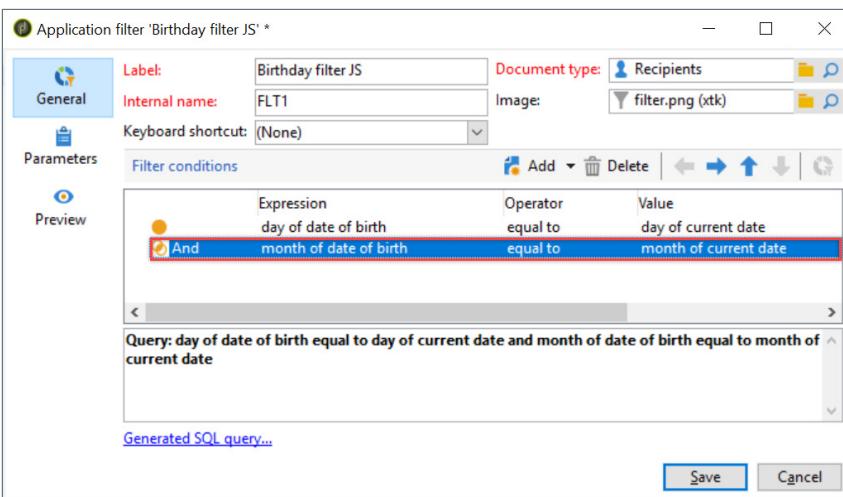
18. Double-click **Month (<Date>)** to place the selected function in the edit zone.

19. In the edit zone, place the cursor inside the () of the **Month()** expression.

20. In the **List of Functions** section, expand **Date** and select **GetDate()**. The expression is added to the edit zone, as shown:



21. Click **Finish**. The **Value** field is updated, as shown:



22. Click **Save**. The filter is created, as shown:

The screenshot shows the 'Predefined filters (By name or label)' interface. At the top, there are search fields for 'Name or label contains:' and 'Document type:', and a toolbar with icons for Filters, Settings, and Delete. Below this is a tree view under the heading 'Label'. Several filters are listed, including 'New recipients (mo...', 'Opened', 'Opened but not clic...', 'Quarantined email...', 'Untargeted recipients', 'Very active recipients', and 'Birthday filter JS'. The 'Birthday filter JS' filter is highlighted with a blue selection bar at the bottom.

23. Double-click **Birthday filter <your initials>** to open the filter on a separate tab, as shown:

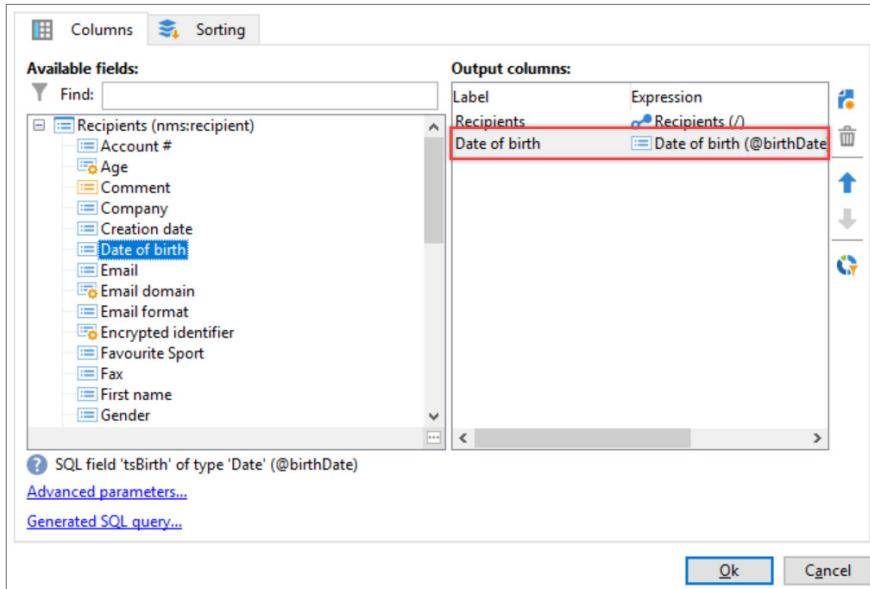
The screenshot shows the 'Application filter 'Birthday filter JS'' configuration screen. It has tabs for General, Parameters, and Preview. The General tab shows the label 'Birthday filter JS', internal name 'FLT1', and a keyboard shortcut '(None)'. The Parameters tab shows the document type as 'Recipients' and an image named 'filter.png (xtk)'. The Preview tab shows the filter conditions: 'day of date of birth' and 'month of date of birth' are both set to 'equal to' 'day of current date' and 'month of current date'. Below the preview area, a query string is displayed: 'Query: day of date of birth equal to day of current date and month of date of birth equal to month of current date'. A link 'Generated SQL query...' is also present.

24. Click **Preview** (on the left panel, as shown) to see the results of the filter, as shown:

The screenshot shows the 'Preview' tab of the 'Application filter 'Birthday filter JS'' configuration screen. It displays a list of recipient names and their email addresses. The list includes Rasmussen Mike, Peterson Vicki, Altizo Bruno, Lecompte Sandrine, Bourtarin Guy, Koeller Anita, Finot Marie-Elisabeth, Bowen Janine, Canadas Marie-Francoise, Cornette Eugenie, Espinguet Bertrand, Miot Manysse, Petain Nathalie, Plumley Adam, Etienne Annie, Chalon Jennifer, Luguet Laurent, Cain Brad, Gugliotta Brenda, Forbes Colleen, Blyth Colin, and Jureidini David. The entire list is highlighted with a red border.

25. Click the **Configure list** icon in the bottom-right corner of the dialog box. The **List configuration 'Recipient (nms)** dialog box opens.

26. In the **Available fields** section, double-click **Date of birth** to add it to the **Output columns** section, as shown:

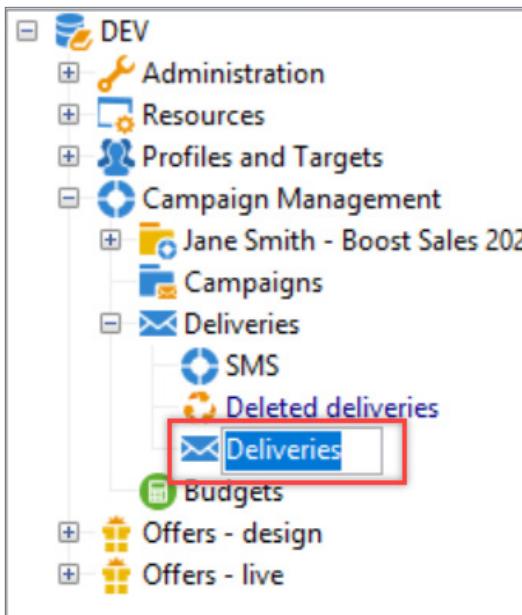


27. Click **Ok** to view the **Date of birth** column on the **Preview** tab, as shown:

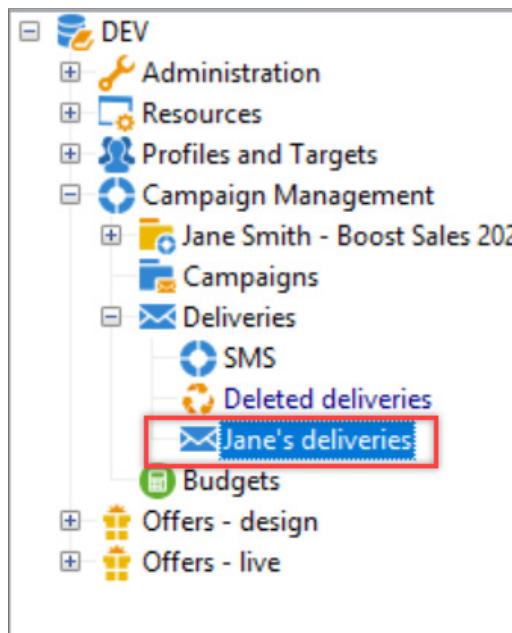
The screenshot shows the 'Application filter' interface. On the left, there are tabs for 'General', 'Parameters', and 'Preview'. The 'Preview' tab is selected. In the center, there is a table titled 'Birthday filter JS' with columns 'Recipients' and 'Date of birth'. The 'Date of birth' column is highlighted with a red border. The table lists numerous recipients with their corresponding birth dates, such as Rasmussen Mike (03/06/1955), Peterson Vicki (v.mc... 03/06/1935), Altizio Bruno (brun... 03/06/1951), Lecompte Sandrine ... 03/06/1965, Boutarin Guy (guy.bo 03/06/1982), Koeller Anita (a.koe... 03/06/1951), Finot Marie-Elisabeth 03/06/1970, Bowen Janine (janine. 03/06/1974), Canadas Marie-Franc... 03/06/1968, Cornette Eugénie (eud 03/06/1973), Espinguet Bertrand... 03/06/1986, Miot Maryse (maryse. 03/06/1990), Petain Nathalie (nath. 03/06/1981), Plumley Adam (a.plu... 03/06/1974), Etienne Annie (annie. 03/06/1964), Chalon Jennifer (jenn 03/06/1948), Luguet Laurent (laur... 03/06/1982), Cain Brad (bcain@hh. 03/06/1959), Gugliotta Brenda (b... 03/06/1962), Forbes Colleen (c.f... 03/06/1961), Blyth Colin (colin.bly. 03/06/1970), Jureidini David (davi... 03/06/1982), and Hwang... David (david.hw... 03/06/1930.

### Task 3: Create a delivery template for the campaign

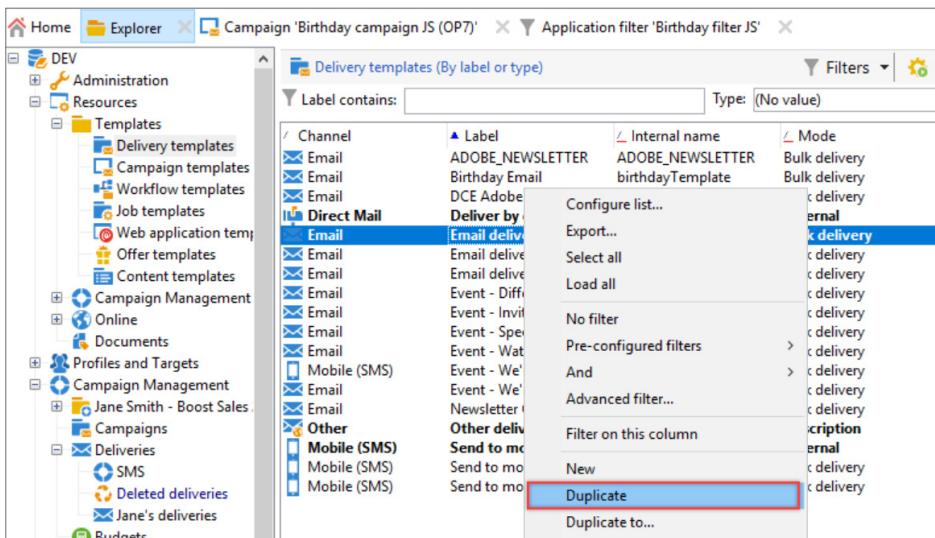
1. To create a delivery template, open the **Explorer** view and select **Campaign Management > Deliveries**.
2. Right-click the **Deliveries** folder and select **Create a new 'Deliveries' folder**. A new **Deliveries** folder is created, as shown:



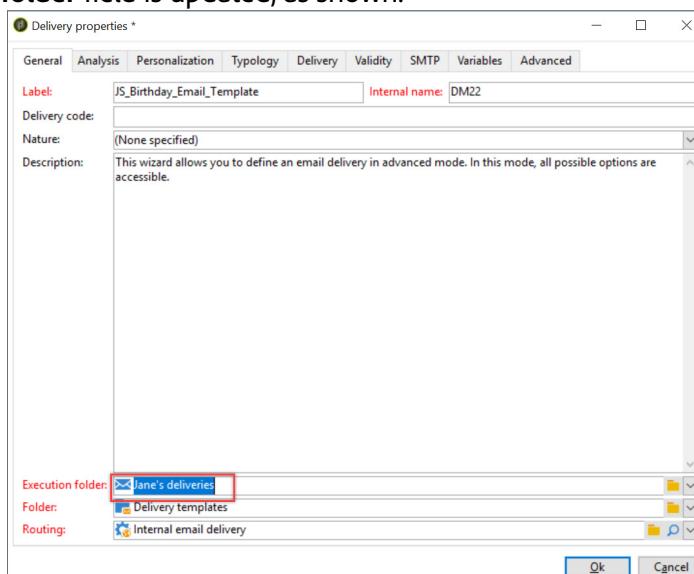
3. Right-click the new folder and select **Rename**.
4. Rename the folder as **<your first name>'s deliveries**. For example, rename the folder as **Jane's deliveries**, as shown:



- Press the **Enter** key to make the changes.
- Navigate to **Resources > Templates > Delivery Templates**. The available delivery templates are displayed in the list view.
- Right-click the **Email delivery** template and select **Duplicate**, as shown. The **Delivery** dialog box opens.

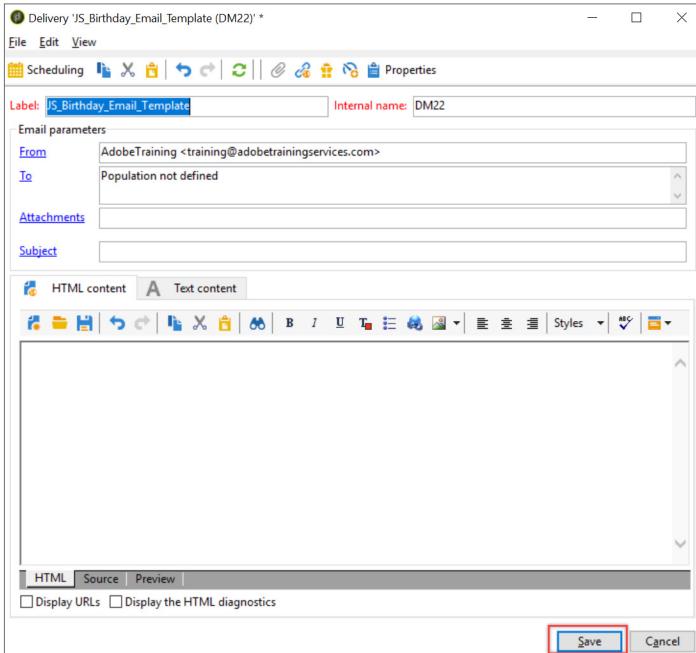


- In the **Label** field, type **<your initials>\_Birthday\_Email\_Template**. For example, enter **JS\_Birthday\_Email\_Template**.
- Click **Properties**. The **Delivery properties** dialog box opens:
  - In the **Folder** field, click the drop-down arrow and select **Resources > Templates > Delivery templates**. Click **Ok**. The **Folder** field is updated.
  - In the **Execution folder** field, click the drop-down arrow and select **Campaign Management > Deliveries > <your initials>'s deliveries** folder that you created in Step 1. The **Execution folder** field is updated, as shown:



c. Click **Ok** to go back to the Delivery dialog box.

10. Click **Save**, as shown: The delivery template is created.



For the single-use birthday campaign, you need to save the Birthday.html file on your computer. Your instructor will provide you with the BirthdayEN.zip folder that contains all the necessary files.

11. Navigate to the location on your computer where you have saved the **BirthdayEN.zip** folder.
12. Right-click the file and select **Extract All** to unzip the file. The **Extract Compressed (Zipped) Folders** dialog box opens.
13. Specify the location in the **Files will be extracted to this folder** field to save the unzipped file and click **Extract**. The file is extracted and saved to the specified location.
14. Locate the unzipped **BirthdayEN** file on the location.
15. Ensure that the file contains the **Birthday-en.html** file and a folder named **img-birth** that contains the **birthdayImage.png**, **birthdayImage-en.png**, and **header.png** images.
16. Go back to the Campaign Classic instance.

17. Double-click the delivery template that you created in this task. For example, open **JS\_Birthday\_Email\_Template**, as shown. The Delivery dialog box opens.

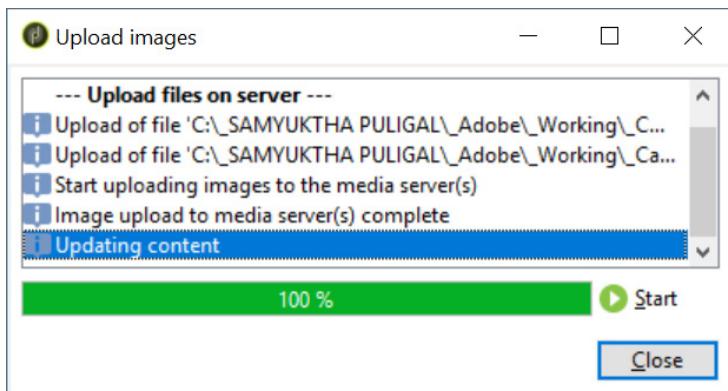
Channel	Label	Internal name	Mode
Email	ADOBE_NEWSLETTER	ADOBE_NEWSLETTER	Bulk delivery
Email	Birthday Email	birthdayTemplate	Bulk delivery
Email	DCE Adobe Newsletter	dceAdobeNewsletter	Bulk delivery
Direct Mail	Deliver by direct mail	paper	External
Email	Email delivery	mail	Bulk delivery
Email	Email delivery for Conte...	mailContestWinners	Bulk delivery
Email	Email delivery for Sales P...	mailSalesReport	Bulk delivery
Email	Event - Different subjec...	eventDifferentSubjectLine	Bulk delivery
Email	Event - Invite to new ev...	Event - Invite to new ev...	Bulk delivery
Email	Event - Specific details	eventSpecificDetails	Bulk delivery
Email	Event - Watch for your c...	eventWatchForYourCou...	Bulk delivery
Mobile (SMS)	Event - We're looking fo...	eventWeAreLookingForw...	Bulk delivery
Email	Event - We're looking fo...	eventWeAreLookingForw...	Bulk delivery
Email	Newsletter Confirmation	newsletterSubscriptionC...	Bulk delivery
Other	Other delivery	other	Description
Mobile (SMS)	Send to mobiles	sms	External
Mobile (SMS)	Send to mobiles via MBI...	sendToMobileViaMBlox	Bulk delivery
Mobile (SMS)	Send to mobiles via NetS...	sendToMobilesViaNetSize	Bulk delivery
Email	JS Birthday Email Tem...	DM22	Bulk delivery

18. On the **HTML content** tab, click the **Open** icon, as shown. The **Open** dialog box opens.

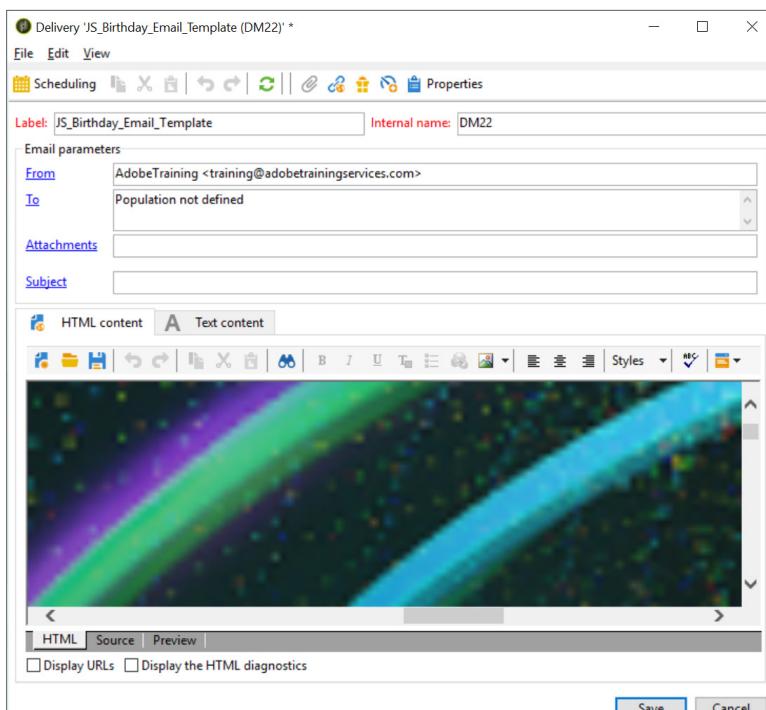
The dialog box contains the following fields:

- Label:** JS\_Birthday\_Email\_Template
- Internal name:** DM22
- Email parameters:**
  - From:** AdobeTraining <training@adobetrainingservices.com>
  - To:** Population not defined
  - Attachments:** (empty)
  - Subject:** (empty)
- HTML content** tab (selected): Contains a rich text editor with a red box highlighting the 'Open' icon in the toolbar.
- Source** tab: Shows the raw HTML code.
- Preview** tab: Shows a preview of the email content.
- Display URLs** and **Display the HTML diagnostics** checkboxes.
- Save** and **Close** buttons.

19. Navigate to the location where you saved the unzipped **BirthdayEN.zip** file.
20. Select the **Birthday-en.html** file and click **Open**.
21. When prompted to publish the images, click **Yes**. The delivery automatically detects the images specified in the .html file and uploads them to the Campaign server. An **Upload Images** dialog box opens with a progress bar, as shown:



22. Once the upload is complete, click **Close** to close the dialog box. The template is updated.
23. Select the **Happy birthday** image on the **HTML content** tab and delete it.
24. Find another birthday image on the Internet and save it on your computer.
25. Click the **Image** drop-down arrow, as shown, and select **From a local file**. The **Image** dialog box opens.



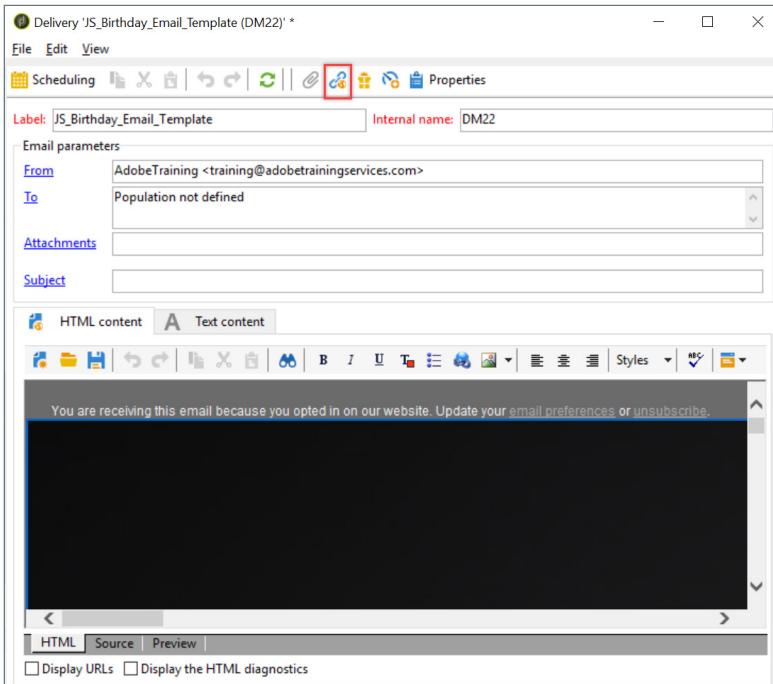
26. Navigate to the location where you saved the image that you downloaded from the Internet.

27. Select the image and click **Open**.

28. Verify the image is uploaded to the **HTML content** tab.

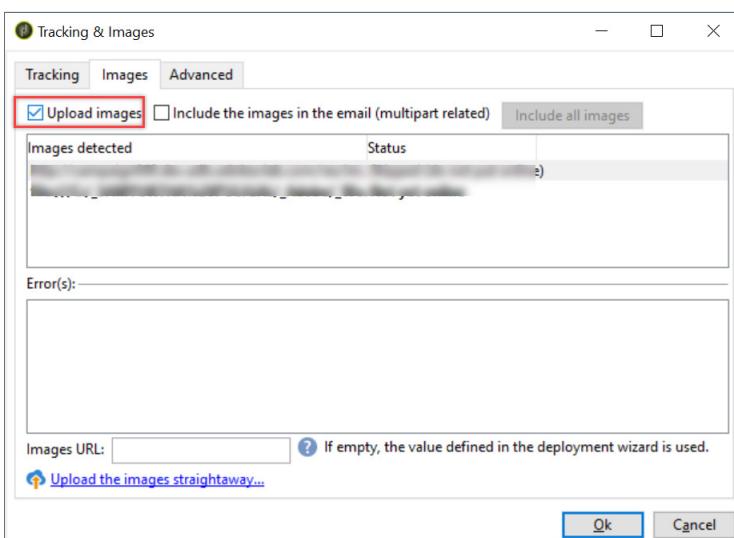
 **Note:** If the image is not embedded in the HTML file, it will not be detected and automatically uploaded on the Campaign server. Any image inserted manually into a delivery must be uploaded manually. Otherwise, a red cross or an empty space will display in the email that the customers will receive.

29. Click the **Tracking & images** icon on the toolbar, as shown, to upload the image manually.

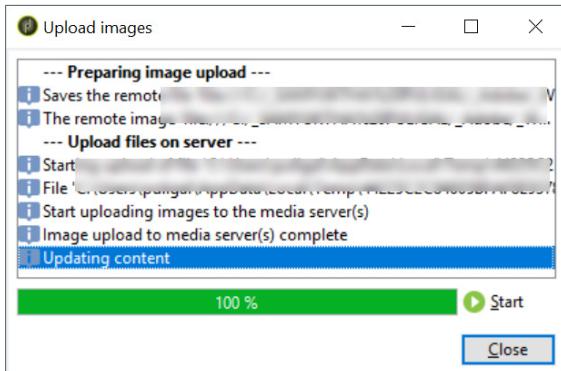


30. Click the **Images** tab. The available options are displayed.

31. Select the **Upload images** checkbox, as shown:



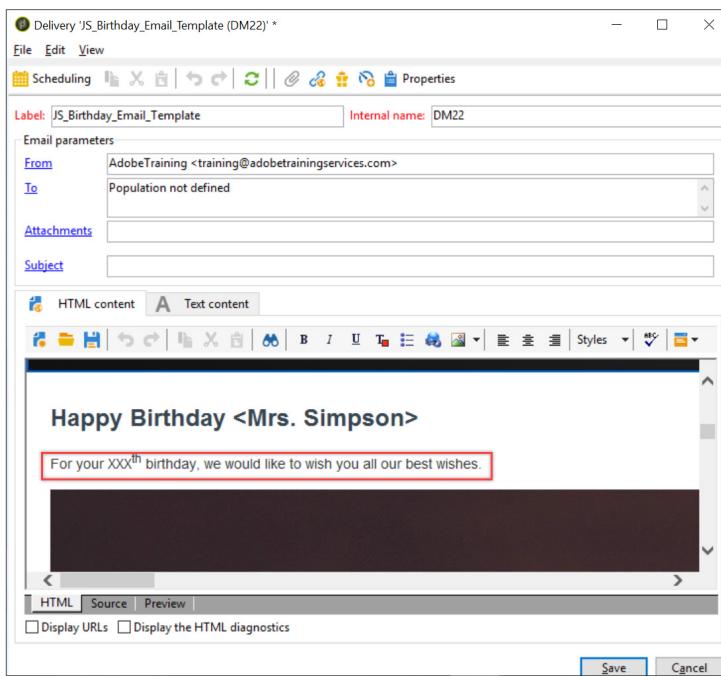
32. Click the **Upload the images straightaway** link. An **Upload images** dialog box opens with a progress bar, as shown:



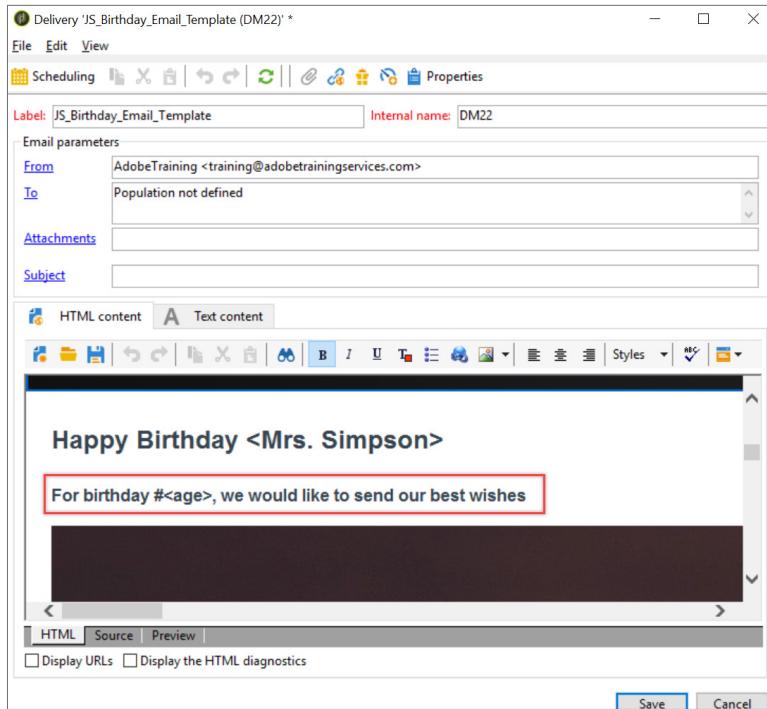
33. Click **Close** to go back to the **Tracking & Images** dialog box.

34. Click **Ok** to close the **Tracking & Images** dialog box.

35. Select the email body, as shown, and delete it.



36. Type **For birthday #<age>, we would like to send our best wishes.** as the email body, as shown:



37. Select **#<age>** and click the **Insert content** drop-down arrow.

38. Select **Recipients> Other**. The **Selection of a field of the target** dialog box opens.

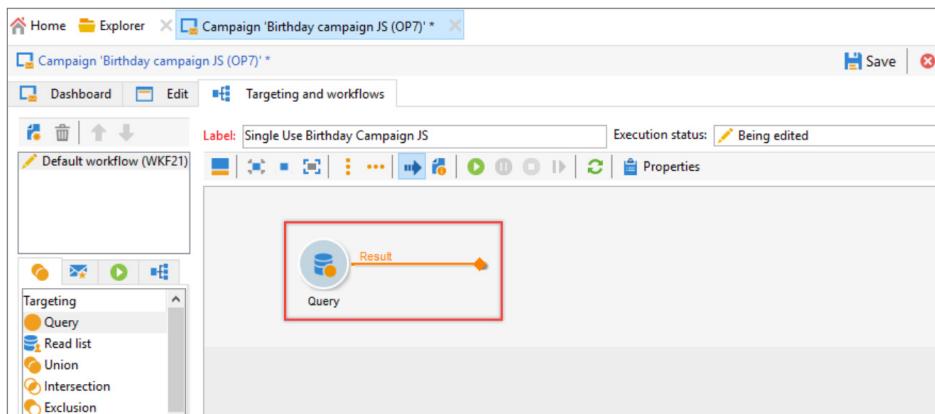
39. Select **Age** and click **Ok** to add the corresponding code to the email body.

40. In the **Subject** field of the email, type **Happy birthday!**

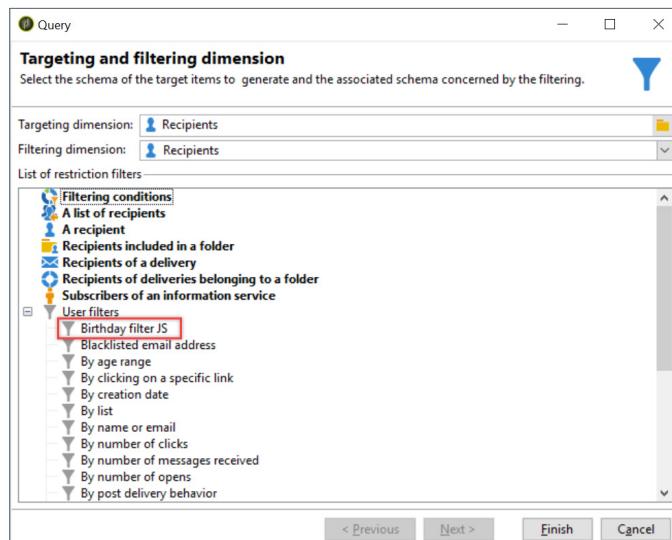
41. Click **Save** to close the Delivery dialog box and save the template.

## Task 4: Create the campaign workflow

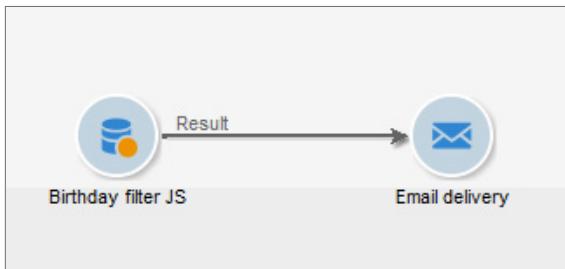
1. Click the **Birthday campaign <your initials>** tab. If you have closed the campaign tab, you can open the campaign by navigating to the **Explorer view > Campaign Management > Campaigns**.
2. Click the **Targeting and workflows** tab.
3. In the **Label** field, rename the workflow as **Single Use Birthday Campaign <your initials>**. For example, type **Single Use Birthday Campaign JS**.
4. Click **Save** to save the changes.
5. Drag a **Query** activity onto the workspace, as shown:



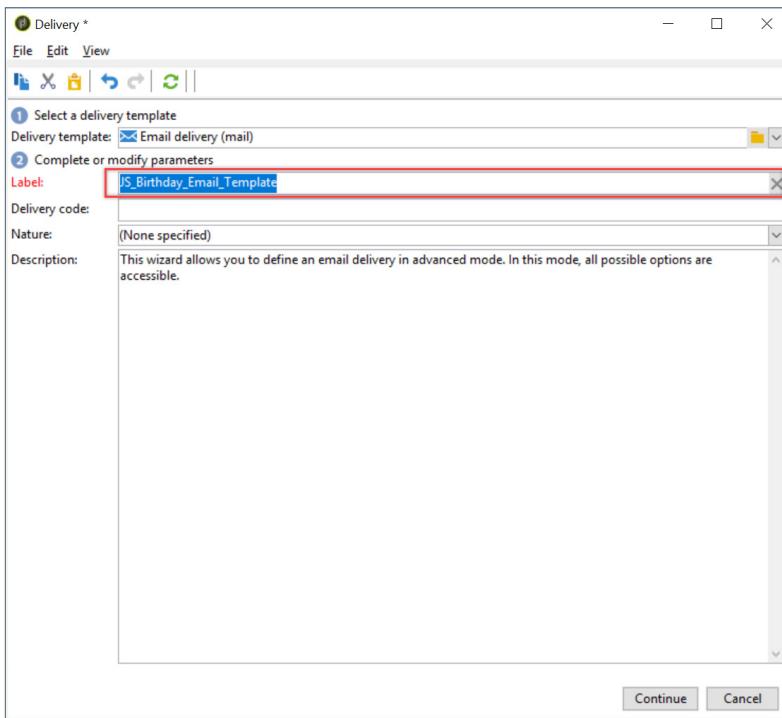
6. Click **Save** to save the workflow.
7. Double-click the **Query** activity. The **Query** dialog box opens.
8. Click **Edit query**. The **Targeting and filtering dimension** page opens.
9. Expand **User filters** and then select **Birthday filter <your initials>**, as shown, and then click **Next**. The **Filter** page opens.



10. Click **Finish** to close the **Filter** page.
11. Click **Ok** to close the **Query** dialog box.
12. Click **Save** to save the workflow.
13. Drag an **Email delivery** from the **Deliveries** palette onto the workflow and join it with the **Query** activity, as shown:



14. Click **Save** to save your workflow.
15. Double-click the **Email delivery** activity. The **Delivery** dialog box opens.
16. In the **Delivery template** field, click the drop-down arrow and select the delivery template that you created. For example, select **JS\_Birthday\_Email\_Template**, as shown:

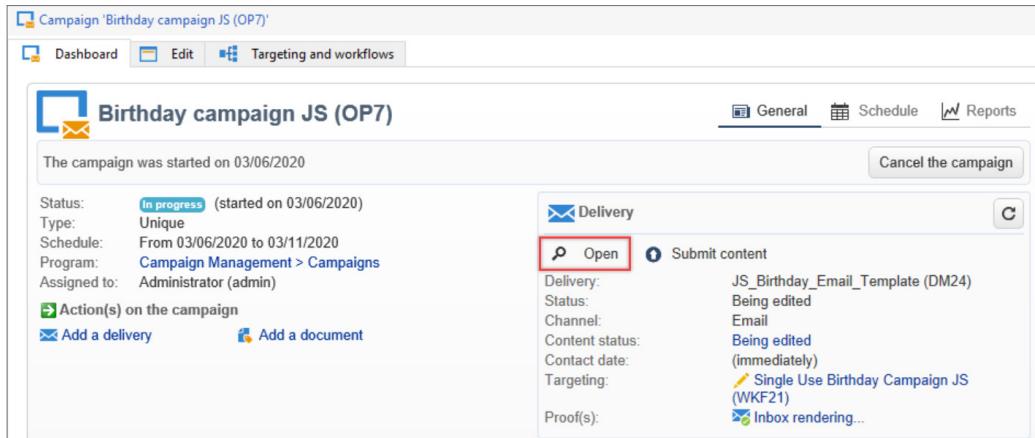


17. Click **Continue**. The page to edit the email content is displayed.
18. Click **Save** to save the delivery.
19. Click **Save** to save the workflow.

20. Click the **Dashboard** tab to view the delivery.

 **Best Practice:** All deliveries should be saved before they are edited. Once saved, you should open the deliveries from the **Dashboard** tab to edit them.

21. In the **Delivery** section, click **Open** to open the Delivery dialog box, as shown:

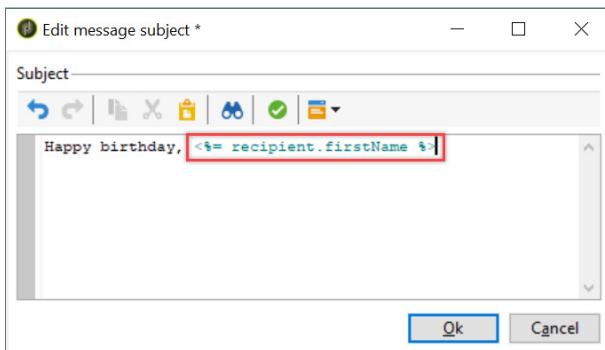


22. Click the **Subject** link. The **Edit message subject** dialog box opens.

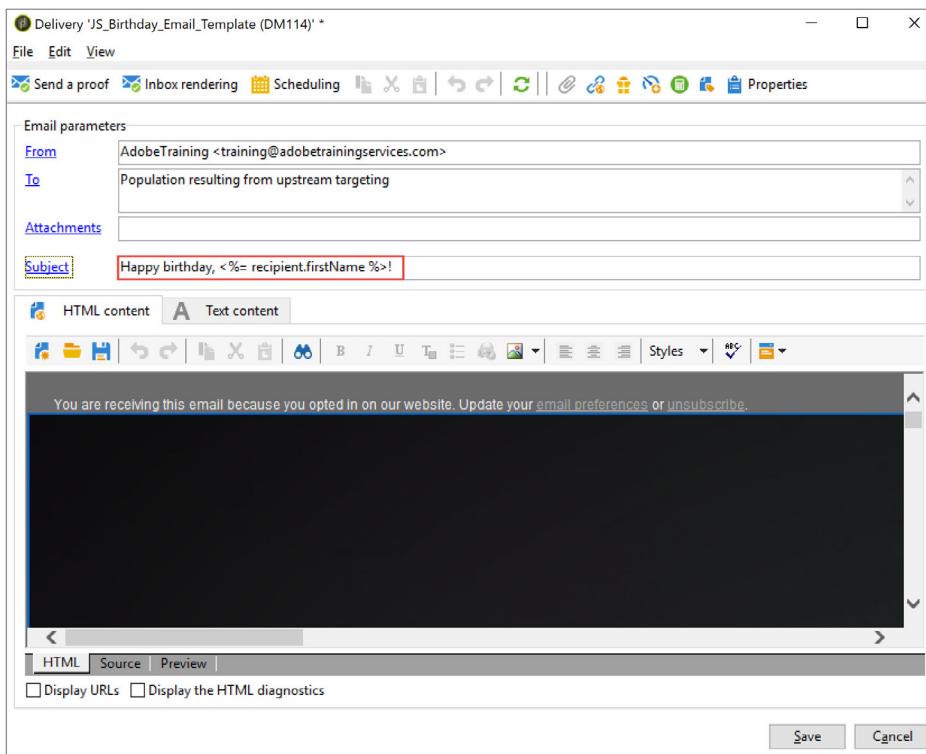
23. In the text box, place the cursor after **Happy birthday** and add a comma.

24. Press the **spacebar**.

25. Click the **Insert content** drop-down arrow and select **Recipients > First name**. The code is added to the text box, as shown:



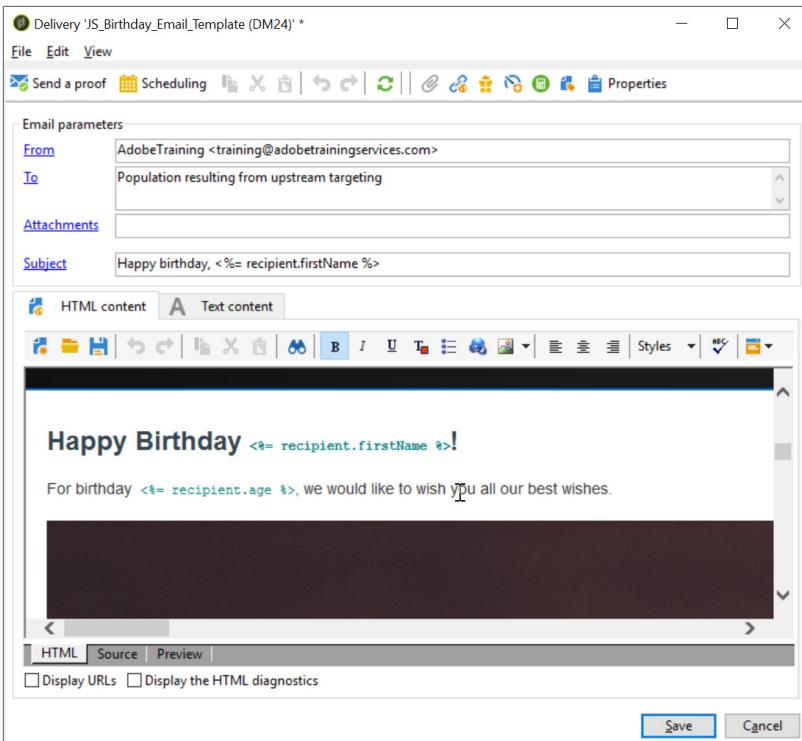
26. Click **Ok** to add the content to the **Subject** field, as shown:



27. In the email body, delete <Mrs. Simpson> and click the **Insert content** drop-down arrow.

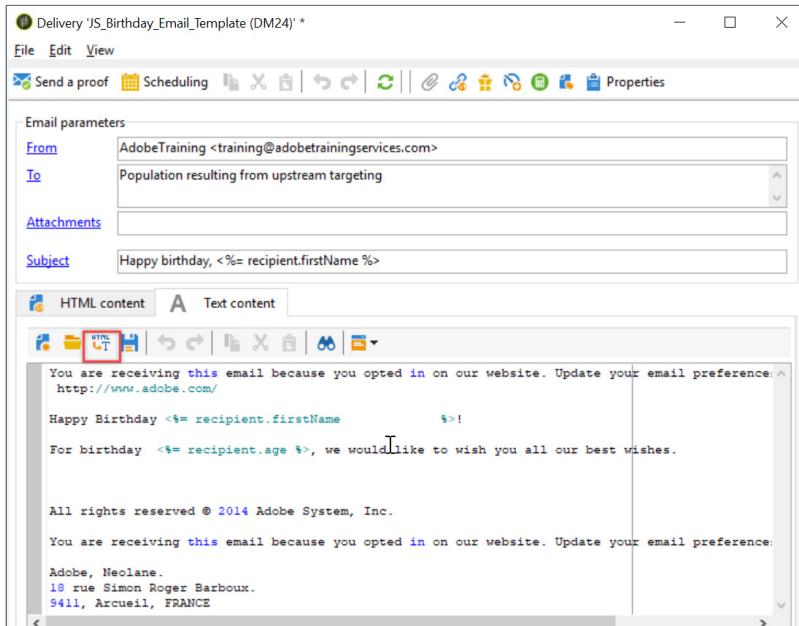
28. Select **Recipients > First name**. The body of the email is updated.

29. Add an exclamation after the first name code, as shown:



30. Click the **Text content** tab to create the text content of the email.

31. Click the **Import HTML** icon, as shown, to view the text format of the message.



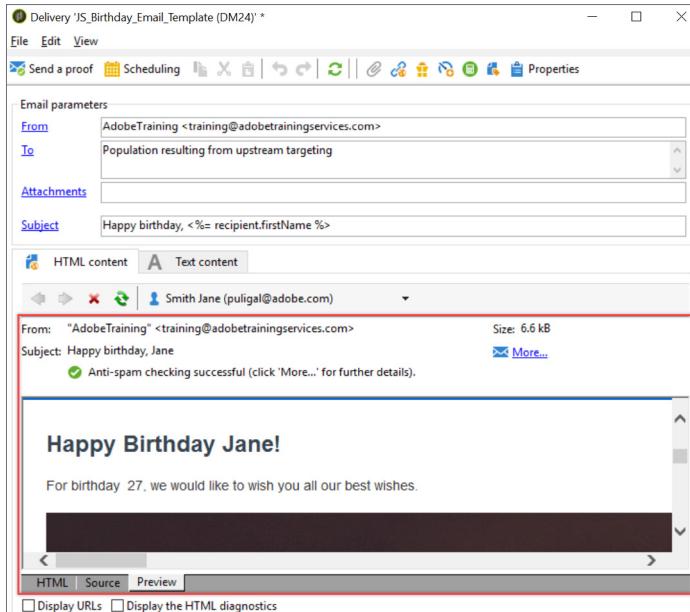
32. Click the **HTML content** tab.

33. Click the **Preview** tab at the bottom of the body of the email.

34. Click the **Test personalization** tab and select **Recipient**. The **Select a recipient** dialog box opens.

35. In the **Folder** field, click the drop-down arrow and select **Recipients > Training**. Click **Ok** to populate the Select a recipient dialog box with the corresponding recipients in that folder.

36. Select a recipient and click **Ok** to view the rendering of the email for the recipient, as shown:



37. Check if **Anti-spam checking successful** is displayed in the email body. If not, you can click the **More** link. The **Preview results** dialog box opens. Click the **Anti-spam checking** tab and review the reason why the email is identified as spam and then click **Close** to go back to the **Delivery** dialog box.

38. Click **Save** to save the delivery.

39. Click **Open** in the **Delivery** section of the **Dashboard**. The **Delivery** dialog box opens.

40. Click **Send a proof** in the upper-left corner. The **Send a proof** dialog box opens.

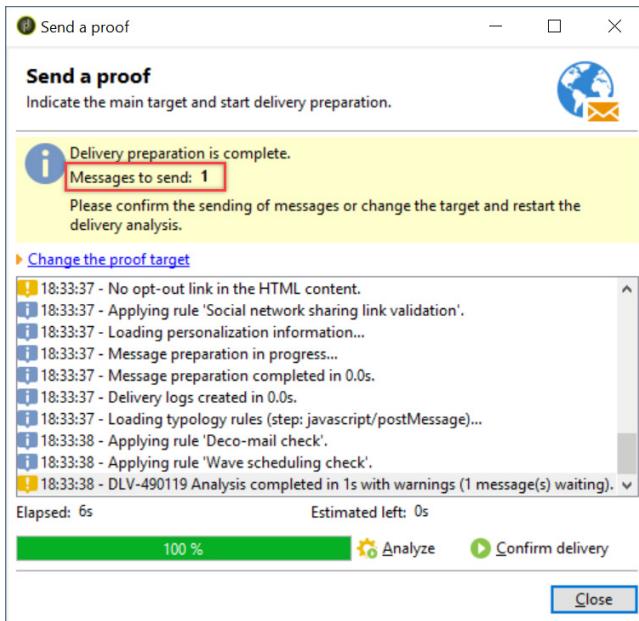
41. Click **Add**. The **Select target element** dialog box opens.

42. Select **A recipient** and click **Next**.

43. Click the **Folder** drop-down arrow and select **Profiles and Targets > Recipients > Training** folder. Click **Ok** to close the **Please select a folder** dialog box. The recipients available in the **Training** folder are displayed.

44. Select your name and click **Finish**. The name is added to the **Send a proof** dialog box.

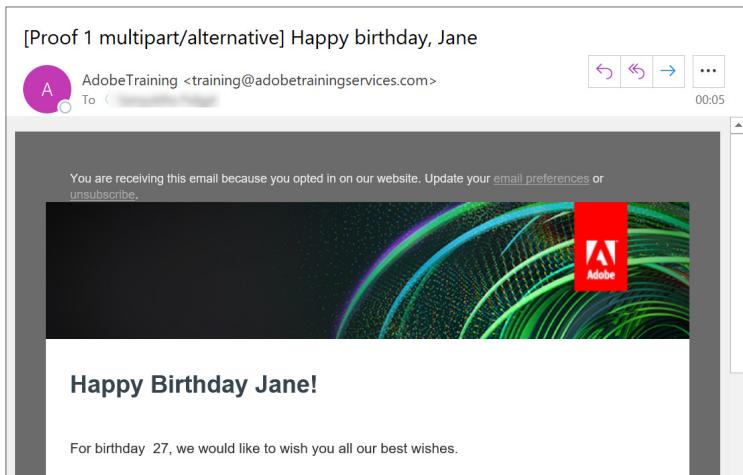
45. Click **Analyze** and wait until the dialog box displays **Message to send: 1** and the progress bar is completely green, labeled **100%**, as shown:



46. Click **Confirm delivery** to send the proof delivery. A confirmation prompt opens.

47. Click **Yes**. The delivery starts and the **Send a proof** dialog box indicates you can close the dialog box.

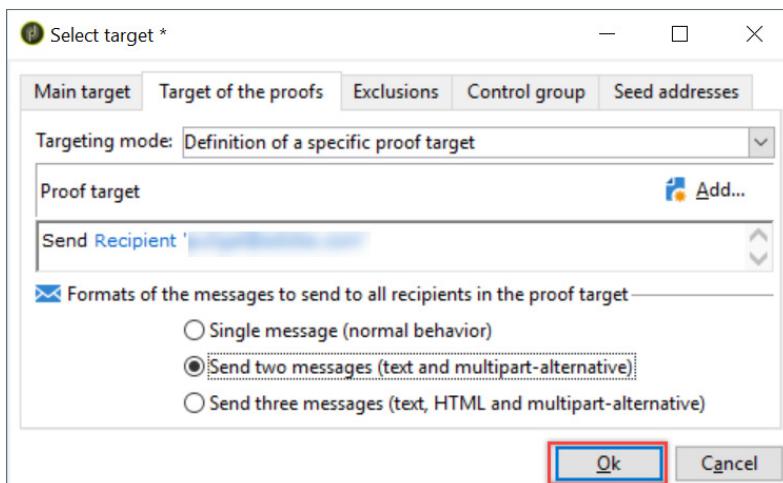
48. Click **Close** to go back to the Delivery dialog box. You will receive an email in the registered email ID, as shown:



49. Go back to Campaign Classic and click the **To** link in the Delivery dialog box. The **Select target** dialog box opens.

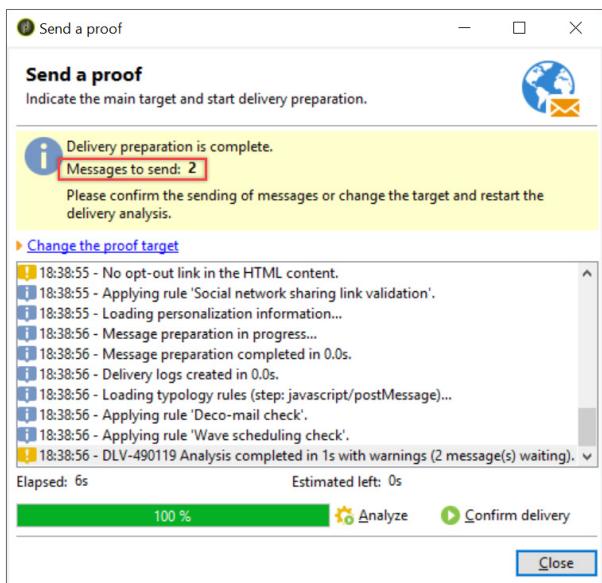
50. Click the **Target of the proofs** tab and select the **Send two messages (text and multipart-alternative)** option.

51. Click **Ok** to close the **Select target** dialog box, as shown:



52. Click **Send a proof** in the Delivery dialog box.

53. Click **Analyze**. The analysis begins. The dialog box displays **Message to send: 2** and the progress bar is completely green, labeled **100%**, as shown:



54. Click **Confirm delivery**. A prompt is displayed.

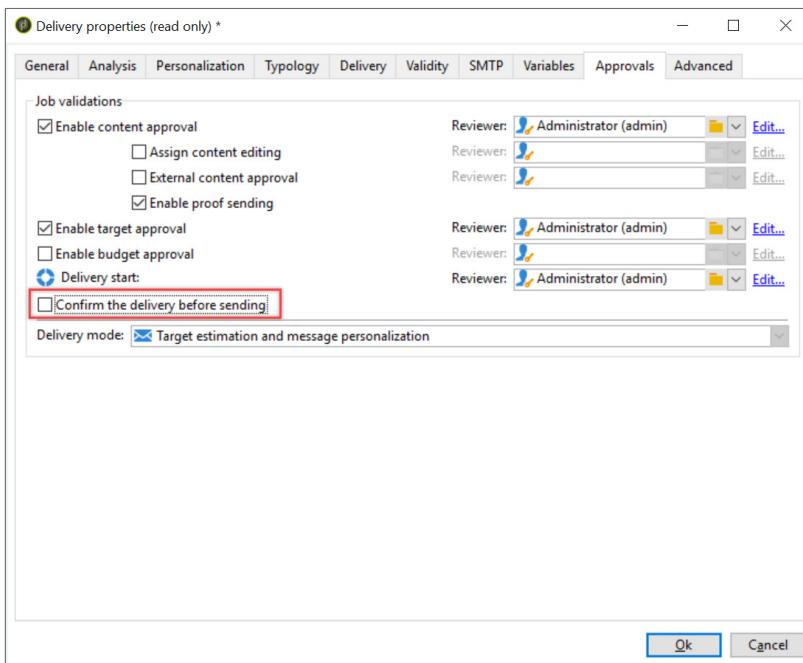
55. Click **Yes**. The delivery starts, and the dialog box will indicate that the messages are sent.

56. Review the versions of the mail that you receive in the registered email ID.

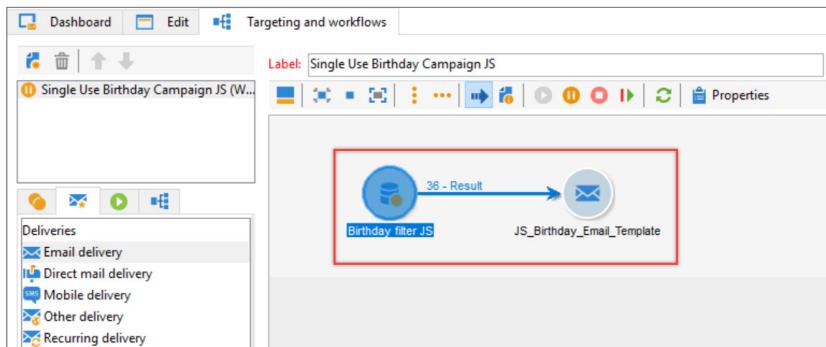
57. Go back to Campaign Classic and click **Close** to go back to the Delivery dialog box.

58. Click **Properties**. The **Delivery properties** dialog box opens.

59. Click the **Approvals** tab, clear the **Confirm the delivery before sending** checkbox, as shown:



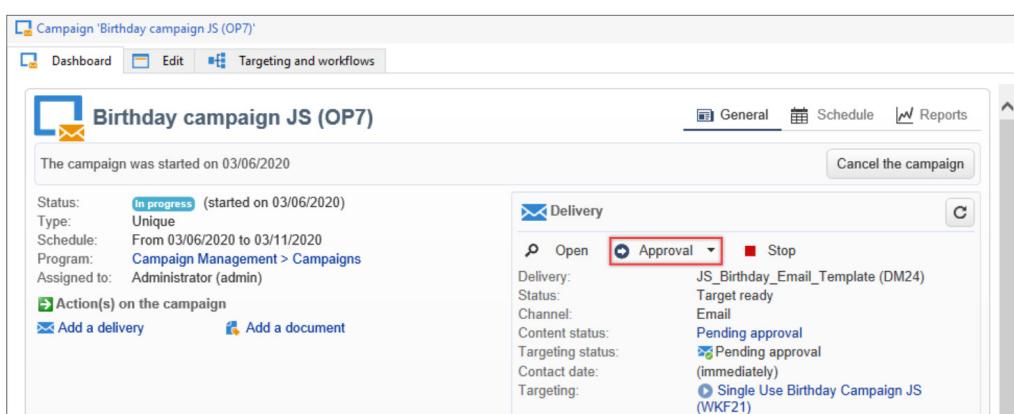
60. Click **Ok** to go back to the Delivery dialog box.
61. Click **Save** to close the Delivery dialog box.
62. Click the **Targeting and workflows** tab.
63. Click the **Start** icon to run the workflow. The email delivery starts the process, as shown:



When you start the workflow, the workflow automatically launches the approval process. Campaign Classic sends an email notification to reviewers so that they can approve the content and targeting.

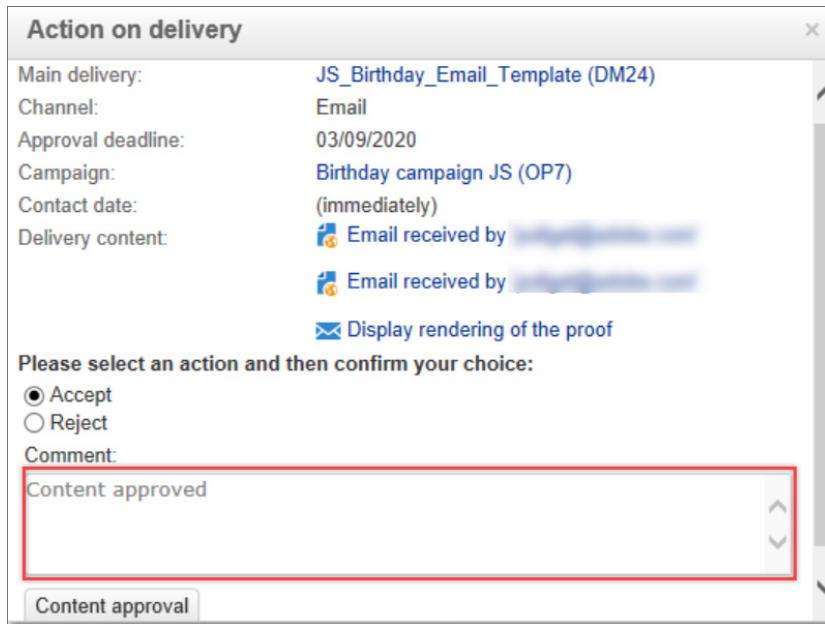
## Task 5: Approve deliveries and execute the campaign

1. Click the **Dashboard** tab. The available deliveries are displayed in the **Delivery** section. By now, you should have received two emails in your registered email ID's inbox. One email is to approve the content of the delivery and the other email is for you to approve the target of your neighbor's campaign.
2. Open the **[Content approval]** email or click the **Approval** drop-down arrow, as shown:

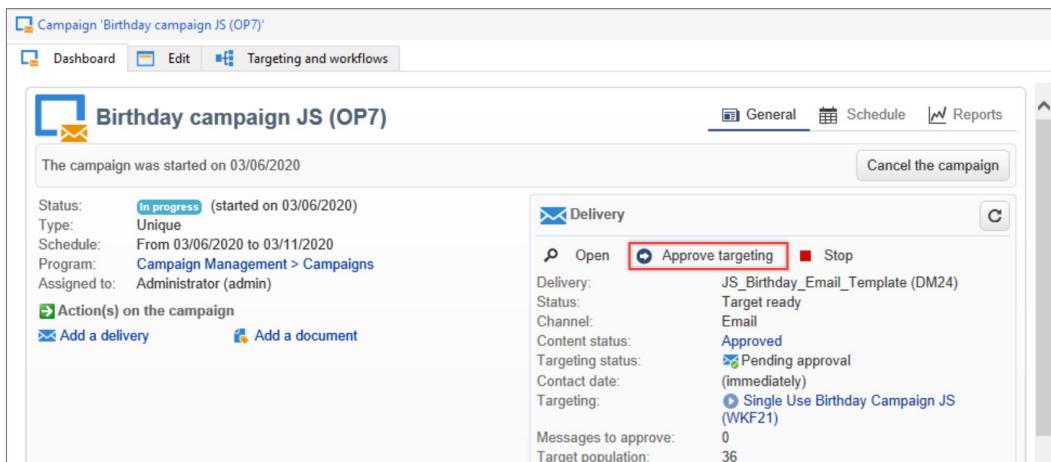


**Note:** If you are approving the content by using the email, you can click the **Approve or reject the delivery content** link in the email. A new window opens in the browser to log in to Campaign Classic. You can log in to the instance and select the desired option and click **Content approval**.

3. Click **Approve content**. The **Action on delivery** dialog box opens.
4. Select the **Accept** option and enter a comment in the **Comment** section, as shown:



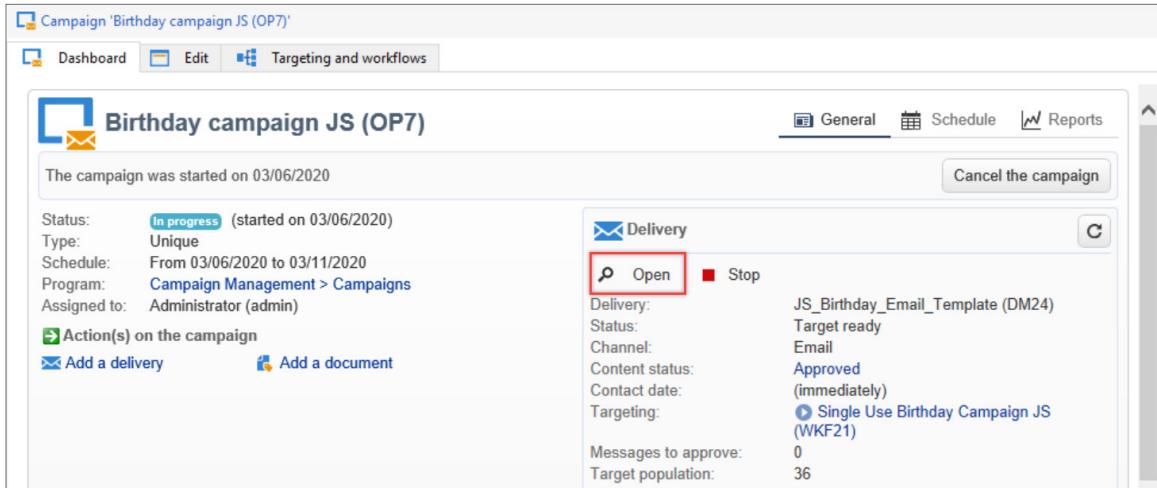
5. Click **Content approval**. The content is approved, and the **Delivery** section displays **Approve targeting**, as shown:



6. Click **Approve targeting**. The **Action on delivery** dialog box opens.
7. Select the **Accept** option and add a comment.
8. Click **Target approval** to approve the delivery content. You will receive two confirmation emails in your registered email ID.

 **Note:** If you are approving the target by using the email, you can click the **Approve or reject the delivery content** link in the [Target approval] email. A new window opens in the browser to log in to Campaign Classic. You can log in to the instance and select the necessary option and click **Content approval**.

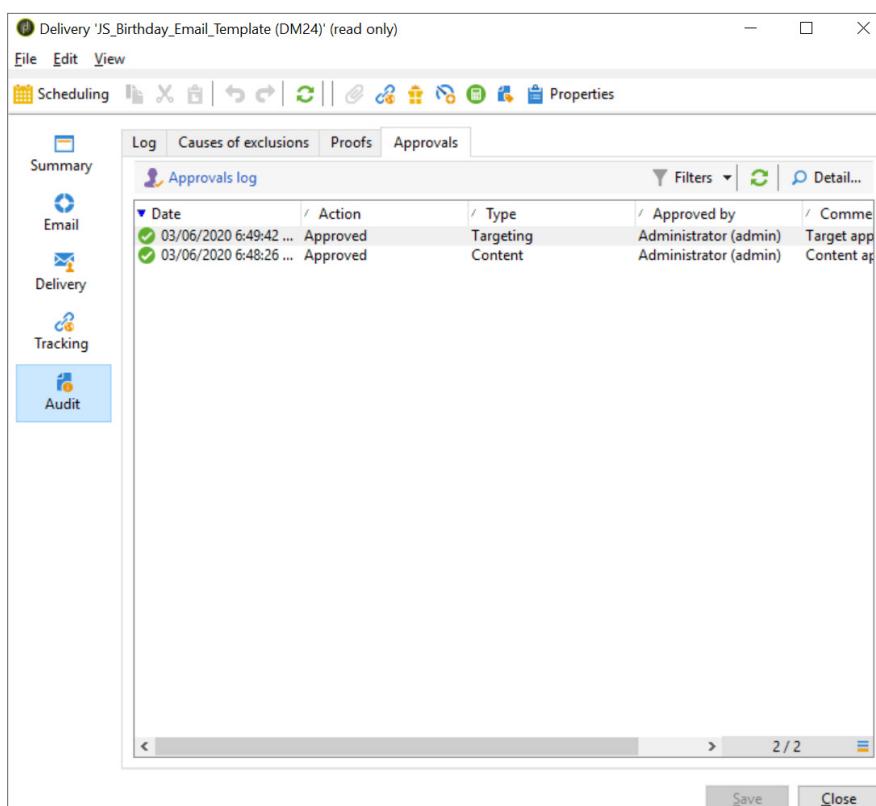
9. Go back to the campaign **Dashboard** and click **Open** in the **Delivery** section, as shown. The Delivery dialog box opens.



The screenshot shows the 'Campaign 'Birthday campaign JS (OP7)'' dashboard. In the top navigation bar, 'Delivery' is selected. On the right, a 'Delivery' dialog box is open, showing the following details:

Delivery	JS_Birthday_Email_Template (DM24)
Status:	In progress (started on 03/06/2020)
Type:	Unique
Schedule:	From 03/06/2020 to 03/11/2020
Program:	Campaign Management > Campaigns
Assigned to:	Administrator (admin)
Action(s) on the campaign	
Add a delivery	Add a document
Delivery	JS_Birthday_Email_Template (DM24)
Status:	Target ready
Channel:	Email
Content status:	Approved
Contact date:	(immediately)
Targeting:	Single Use Birthday Campaign JS (WKF21)
Messages to approve:	0
Target population:	36

10. Click the **Audit** tab to view the available options.
11. Click the **Approvals** (on the left panel) tab to verify the reviewer details and comments, as shown:



The screenshot shows the 'Audit' interface for the 'JS\_Birthday\_Email\_Template (DM24)' delivery. The left sidebar has tabs for Summary, Email, Delivery, Tracking, and Audit, with Audit selected. The main area shows the 'Approvals log' table:

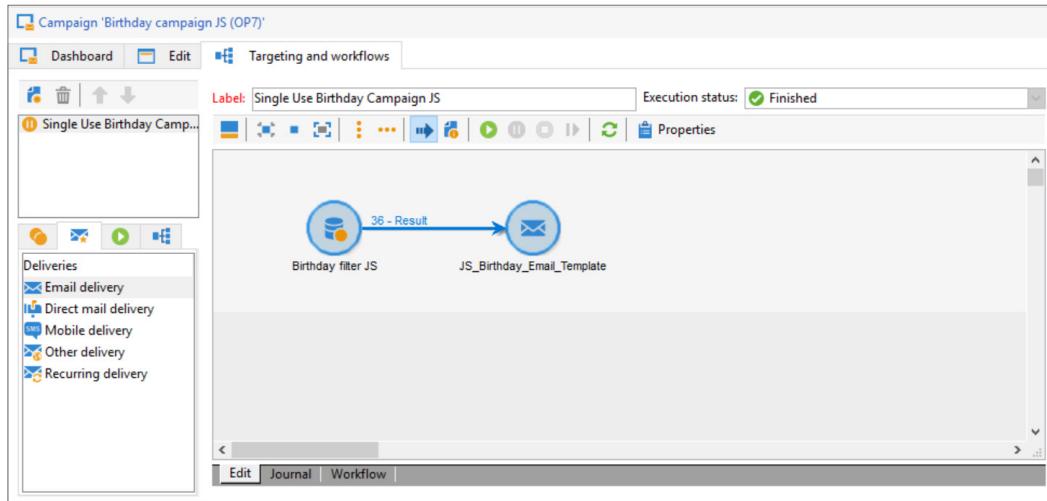
Date	Action	Type	Approved by	Comments
03/06/2020 6:49:42 ...	Approved	Targeting	Administrator (admin)	Target app
03/06/2020 6:48:26 ...	Approved	Content	Administrator (admin)	Content ap

---

 **Note:** If you approved the target and content by using email, the **Approved by** column will display your name. If the approval was done through the instance and you have admin rights to the instance, the **Approved by** column will display the reviewer details as **Administrator (admin)**.

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12. Click the **Targeting and workflows** tab to go back to the workflow, as shown:

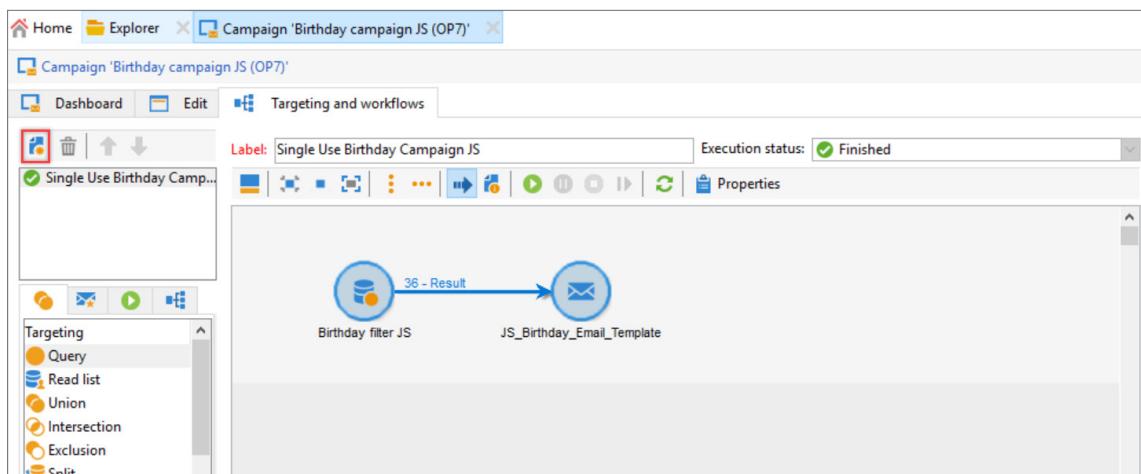


## Exercise 2: Create a recurring birthday campaign

**Scenario:** Your marketing team has asked you to create a recurring campaign, so that they can send birthday wishes to customers. In this exercise, you will use the same birthday template to configure a recurring birthday delivery for the customers. You will also use a Scheduler activity, so that the deliveries are sent to the customers at a scheduled time.

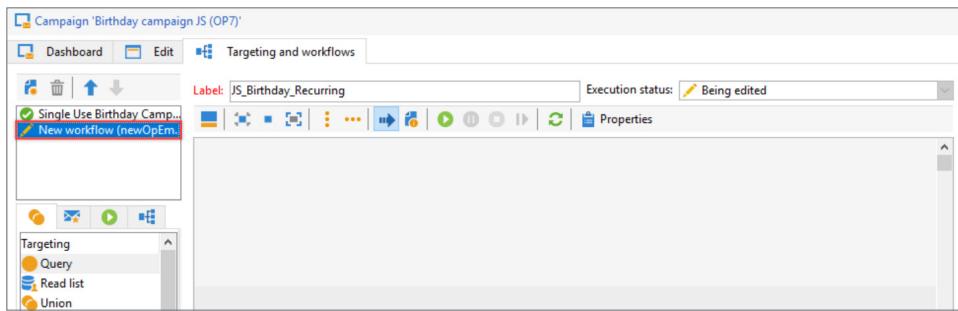
 **Note:** Ensure that you navigate to the Explorer view and then navigate to the **Profiles and Targets > Recipients > Training** folder. Select your profile and change the **Date of birth** option to the current date so that you receive a delivery while performing this exercise.

1. In the **Explorer** view, navigate to **Campaign Management > Campaigns**.
2. Open the campaign you created in Exercise 1. For example, open **Birthday campaign JS**.
3. Click the **Targeting and workflows** tab to view the available workflows.
4. Click the **Add** icon, as shown. The **New targeting workflow** dialog box opens.

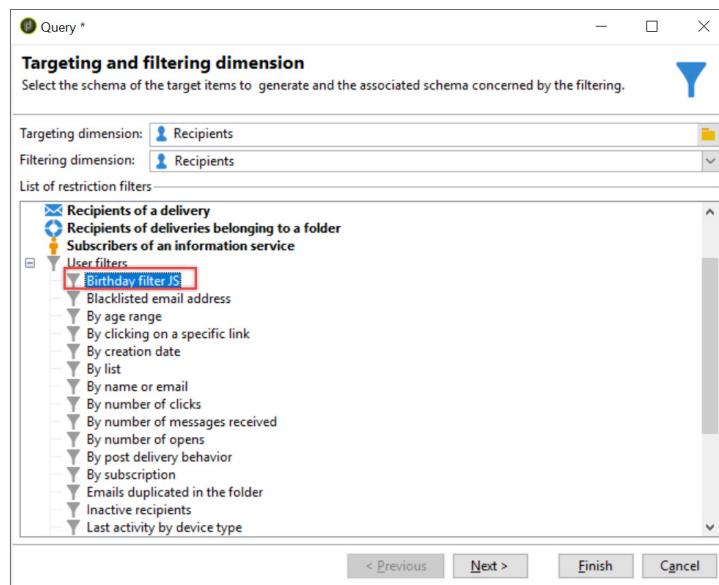


5. In the **Label** field, type **<your initials>\_Birthday\_Recurring**. For example, type **JS\_Birthday\_Recurring**.

6. Click **Ok** to create a new workflow, as shown:



7. Drag a **Query** activity onto the workspace.
8. Double-click the **Query** activity. The **Query** dialog box opens.
9. Click the **Edit query** link. The **Targeting and filtering dimensions** page opens.
10. Expand **User filters** and select the birthday filter that you created earlier. For example, select **Birthday filter JS**, as shown:

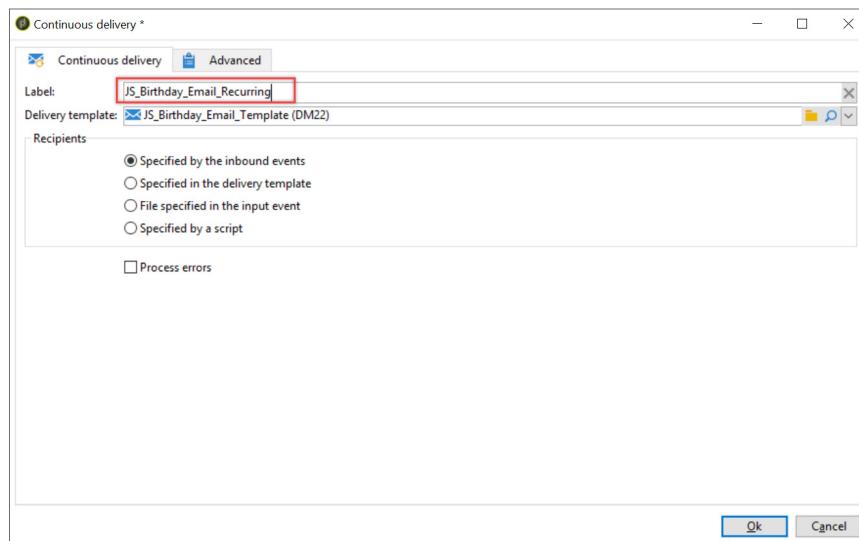


11. Click **Next**. The **Filter** page opens.
12. Click **Finish** to go back to the **Query** dialog box.
13. Click **Ok** to go back to the workflow.
14. Click **Save** to save the workflow.

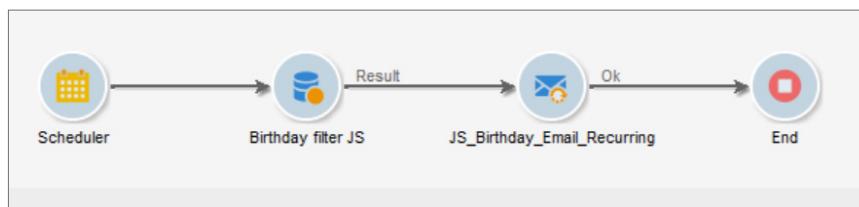
15. Drag a **Continuous delivery** activity from the **Actions** palette and join it with the **Query** activity, as shown. You cannot use a standard delivery template because it cannot be sent several times.



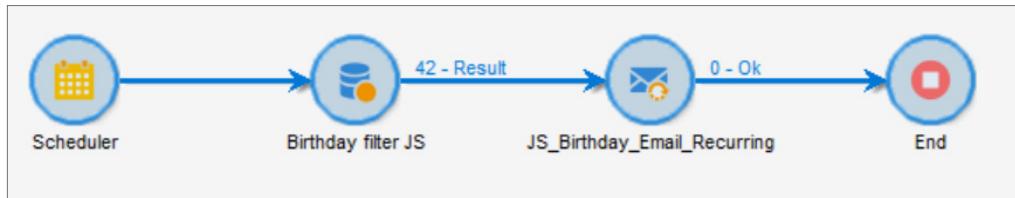
16. Double-click the **Continuous delivery** activity. The **Continuous delivery** dialog box opens.
17. In the **Delivery template** field, click the drop-down arrow and select the birthday template you created in the previous exercise. For example, select **JS\_Birthday\_Email\_Template**. Once the template is selected, click **Ok** to return to the Continuous delivery dialog box
18. In the **Label** field, type **<your initials>\_Birthday\_Email\_Recurring**. For example, type **JS\_Birthday\_Email\_Recurring**, as shown:



19. Click **Ok** to close the **Continuous delivery** dialog box.
20. Drag an **End** activity from the **Flow Control** palette and join it with the transition line from the **Continuous delivery** activity.
21. Click **Save** to save the workflow.
22. Drag a **Scheduler** activity from the **Flow Control** palette to the beginning of the workflow and link the **Scheduler** activity to the **Query** activity, as shown:



23. Click **Save** to save the workflow.
24. Double-click the **Scheduler** activity to open it. The **Scheduler** dialog box opens.
25. In the **Scheduler** tab, click **Change** in the lower-right corner. The **Schedule editing wizard** opens.
26. Select **Daily** and click **Next**. The **Daily** page opens.
27. In the **Start time** field, configure the time as **9:00:00 A.M.**
28. In the **Day selection** section, retain the default **Every day** as the day selection and click **Next**. The **Validity period** page opens.
29. Retain the validity period as **Permanent validity**.
30. Click **Next**. The **Summary** page opens.
31. Review the summary of the next launch times.
32. Click **Finish** to go back to the **Scheduler** dialog box.
33. Click **Ok** to close the **Scheduler** dialog box.
34. Click **Save** to save the workflow.
35. Click the **Start** icon to execute the workflow. The **Scheduler** activity starts processing but remains paused based on the starting hour that you configured in the activity.
36. Right-click the **Scheduler** activity and select **Execute pending task(s) now**. The workflow is processed and the birthday delivery is sent, as shown:



37. Check if the **Scheduler** activity is blinking. The activity is waiting for the next launch. The workflow will execute the deliveries every day at the time specified in the **Scheduler** activity.

## Exercise 3: Create a retargeting campaign

---

**Scenario:** You want to invite the Newsletter subscribers to an event. You want to also send an initial delivery and then, based on the recipients' reactions, you want to either retarget or follow-up on the customers who opened or clicked the email. Then, you will send a series of sequenced emails, each containing information about the upcoming event. At the end, you will send customers an official coupon through email and direct mail to carry when they come for the event.

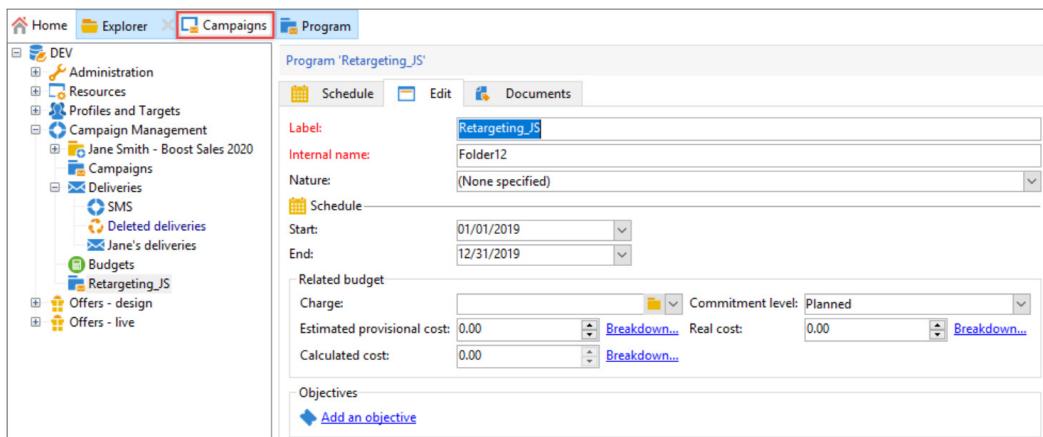
This exercise includes the following tasks:

1. Create the retargeting campaign
2. Configure the retargeting campaign
3. Execute the retargeting campaign

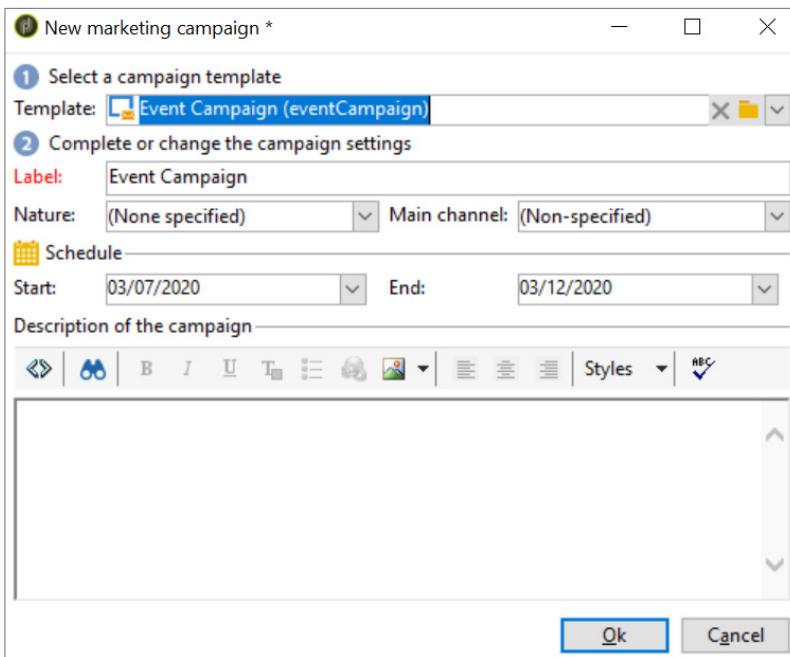
### Task 1: Create the retargeting campaign

1. On the **Home** page, click **Explorer** to open the Explorer view.
2. Right-click the main **Campaign Management** folder and select **Add new folder > Campaign Management > Program**. A new **Program** folder is created.
3. Click the **Program** folder. The **Campaigns** tab and the **Program** tab are added to the available tabs in Campaign Classic.
4. Click the **Program** tab. The program schedule opens in the Schedule tab.
5. Click the **Edit** tab to edit the program.
6. In the **Label** field, type **Retargeting\_<your initials>**. For example, type **Retargeting\_JS**.
7. Click **Save** to save the program.

- Click the **Campaigns** tab, as shown, to create a new campaign in the program.



- In the list view, click the **New** icon. The **New marketing campaign** dialog box opens.
- In the **Label** field, type **Event\_Campaign\_<your initials>**. For example, type **Event\_Campaign\_JS**.
- In the **Template** field, click the drop-down arrow and select the **Event Campaign (eventCampaign)** template, as shown:

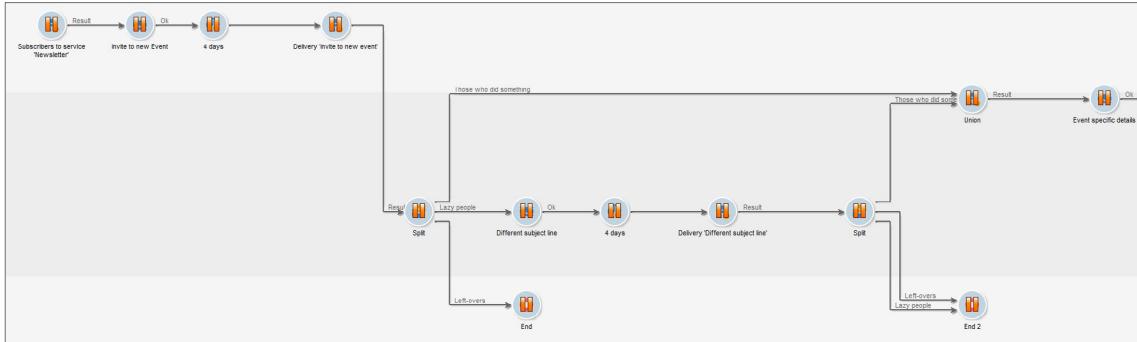


12. Click **Ok**. The campaign is created, as shown:

The screenshot shows the Marketing Campaigns interface. On the left, there's a navigation tree under 'DEV' with sections like Administration, Resources, Profiles and Targets, and Campaign Management. Under Campaign Management, there's a 'Campaigns' node expanded, showing a list of campaigns including 'Jane Smith - Boost Sales 2020' and 'Event Campaign (OP..Started)'. The 'Event Campaign (OP..Started)' is highlighted with a red border. On the right, a detailed view of the 'Event Campaign (OP9)' is shown. It has tabs for 'Dashboard', 'Edit', and 'Targeting and workflows'. The 'Edit' tab is selected, displaying the campaign's details: it was started on 03/07/2020, is currently 'In progress' (started on 03/07/2020), and is of type 'Unique'. Below this, there's a large text area containing the campaign's logic.

## Task 2: Configure the retargeting campaign

1. Double-click the new campaign you just created. The campaign opens in a separate tab.
2. Click the **Targeting and workflows** tab to open the workflow. The workflow is created as part of the template, as shown:



You will configure the campaign workflow in five "parts":

- Part 1: The subscribers of the Newsletter receive a delivery to attend an event. Four days later, check how many subscribers successfully received the invite.
- Part 2: The subscribers who did not react to the event invite delivery are retargeted by sending another delivery with a different subject line.
- Part 3: The subscribers who opened the event delivery and the delivery with a separate subject line are combined using the Union activity.
- Part 4: The customers who want to attend the event are sent an email and an SMS that contain teasers about the event.
- Part 5: The customers who will attend the event are sent a coupon by email and direct mail to show at the event.

**Part 1: The subscribers of the Newsletter receive a delivery to attend an event. Four days later, check how many subscribers successfully received the invite.**

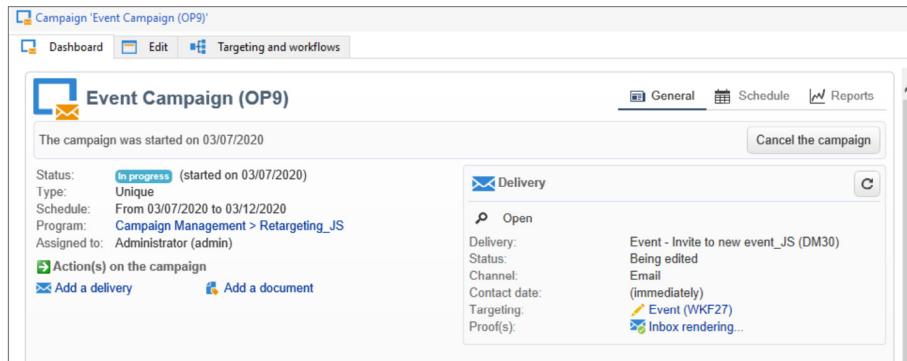
This part of the workflow is shown below:



3. Right-click the **Subscribers to service 'Newsletter'** activity and select **Normal execution**. The query is configured to target the subscribers of the Newsletter service.

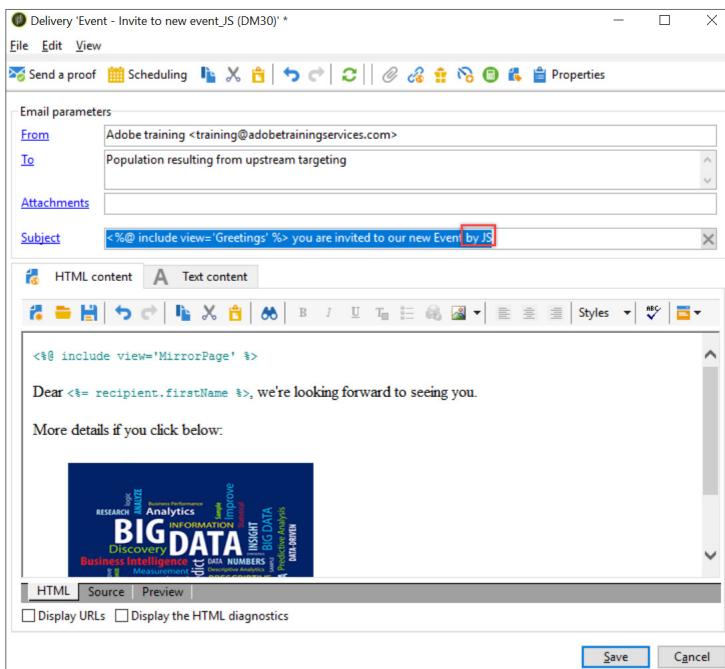
**Note:** If the Subscribers to service is other than 'Newsletter'. Double click to open the query. Click **Edit query** and select **Newsletter** and click **Finish**.

4. Right-click the **Invite to new Event** delivery activity and select **Normal execution**.
5. Double-click the **Invite to new Event** delivery activity. The **Delivery** dialog box opens.
6. Click the **Delivery template** drop-down arrow and select the **Event - Invite to new event (Event - Invite to new event)** template.
7. In the **Label** field, add your initials to the end of the name of the delivery. For example, write the delivery name as **Event - Invite to new event\_JS**.
8. Click **Continue**. The page to personalize the email opens.
9. Click **Save** to save the delivery.
10. Click **Save** to save the workflow.
11. Click the **Dashboard** tab. The **Delivery** section displays the saved deliveries, as shown:



12. Click **Open** in the Delivery section. The Delivery dialog box opens.

13. In the **Subject** line, type **by** and <your initials>, as shown:



14. Click **Save** to save the changes and close the **Delivery** dialog box.

15. Click the **Targeting and workflows** tab to go back to the workflow.

16. Right-click the **4 days** Wait activity and select **Normal execution**.

The **4 days** Wait activity pauses the workflow for four days to give time to people to react to the delivery.

17. Double-click **4 days** Wait activity and ensure that the wait period is set to 4 days.

18. Click **Ok** to close the **Wait** dialog box.

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

20. Right-click the **Delivery 'Invite to new event'** query activity and select **Normal execution**. The activity is configured to retrieve the recipients who successfully received the **Event - Invite to new event\_<your initials>** delivery.

21. Double-click the **Delivery 'Invite to new event'** query activity. The **Query** dialog box opens.

22. Click the **Edit query** link. The **Filter** page opens.

23. Ensure the **Behavior** field is specified as **Recipients associated with messages successfully sent**.

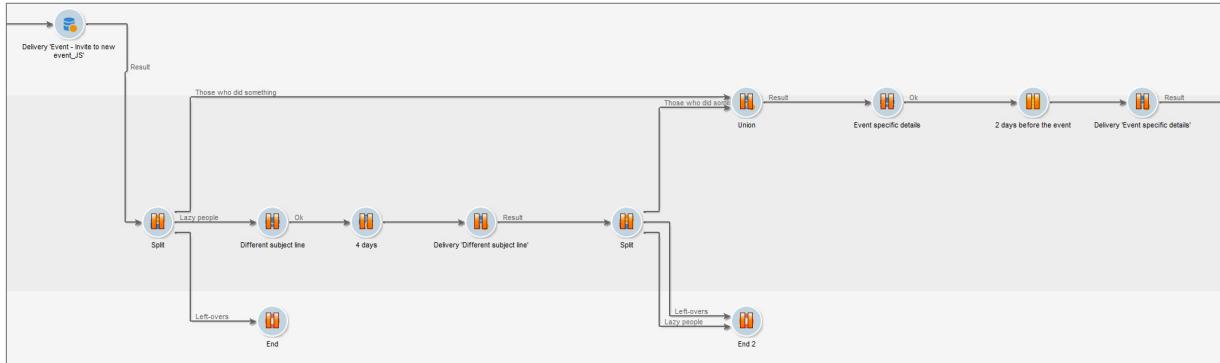
24. Ensure that the **Specify a delivery** option is selected.

25. In the **Delivery** section, select the **Event - Invite to new event\_<your initials>** delivery. For example, select **Event - Invite to new event\_JS**.

26. Click **Finish** to close the **Filter** page.
27. Click **Ok** to close the **Query** dialog box.
28. Click **Save** to save the workflow.

**Part 2: The subscribers who did not react to the event invite delivery are retargeted by sending another delivery with a different subject line.**

This part of the workflow is shown below:



29. Right-click the first **Split** activity and select **Normal execution**.
30. Double-click the first **Split** activity. The **Split** dialog box opens. The **Split** activity contains two subsets and one Complement.
31. Click the **General** tab. The available options are displayed.
32. In the **Results** sections, ensure that the **Generate complement** option is selected and in the **Label** field, **Left-overs** is specified.
33. Click the **Subsets** tab. The available subsets are displayed.
34. Click the **Edit** link in the **Filtering of selected records** section. The **Query** dialog box opens.
35. In the **Behavior** field, ensure **Recipients who have opened or clicked (email)** is specified.
36. Ensure that the **Delivery specified by the transition** option is selected.
37. Click **Cancel** to close the **Query** dialog box.
38. Select the **Lazy people** subset tab at the bottom of the window. The available options are displayed.
39. In the **Label** field, type **Those who did not open or click**.
40. Click the **Edit** link. The **Query** dialog box opens.
41. In the **Behavior** field, ensure that **Recipients who have not opened or clicked (email)** is specified.
42. Ensure that the **Delivery specified by the transition** option is selected.

43. Click **Cancel** to close the **Query** dialog box.

44. Click **Ok** to close the **Split** activity.

The **Left-overs** transition contains recipients who are excluded as part of the complement. They are routed to an **End** activity and are not targeted anymore.

45. Right-click the **End** activity connected to the **Left-overs** transition from the first **Split** activity and select **Normal execution**.

The **Those who did not open or click** transition from the first **Split** activity contains the recipients who did not open or react to the **Event - Invite to new event\_<your initials>** delivery. The recipients are retargeted with the same content but a different subject line.

46. Right-click the **Different subject line** delivery and select **Normal execution**.

47. Double-click the **Different subject line** delivery. The **Delivery** dialog box opens.

48. In the **Delivery template** field, select the **Event - Different subject line (eventDifferentSubjectLine)** template.

49. In the **Label** field, add your initials to the end of the name of the delivery. For example, **Event - Different subject line\_JS**.

50. Click **Continue**. The email content is displayed.

51. Click **Save** to save the delivery.

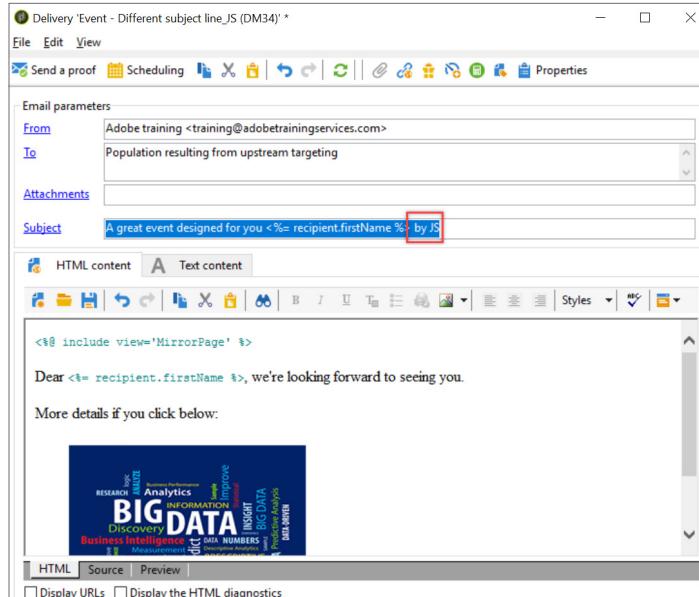
52. Click **Save** to save the workflow.

53. Click the **Dashboard** tab. The available deliveries are displayed in the **Deliveries** section.

54. Click the **Event - Different subject line\_<your initials>** delivery. The **Open** button is displayed.

55. Click **Open** to edit the delivery.

56. In the **Subject** field, type **by** and **your initials** after the subject line, as shown:



57. Click **Save** to close the Delivery dialog box.

58. Click the **Targeting and workflows** tab to go back to the workflow.

The **4 days** wait activity placed after the Different Subject line \_<yourinitials> delivery pauses the workflow for four days to give time to people to react to the delivery.

59. Right-click the **4 days** Wait activity and select **Normal execution**.

60. Double-click the **4 days** Wait activity.

61. Ensure that the duration is set to **4 days** and click **Ok**.

The **Delivery 'Different subject line'** query is configured to retrieve the recipients who successfully received the invite with a different subject line.

62. Right-click the **Delivery 'Different subject line'** query and select **Normal execution**.

63. Double-click the **Delivery 'Different subject line'** query. The **Query** dialog box opens.

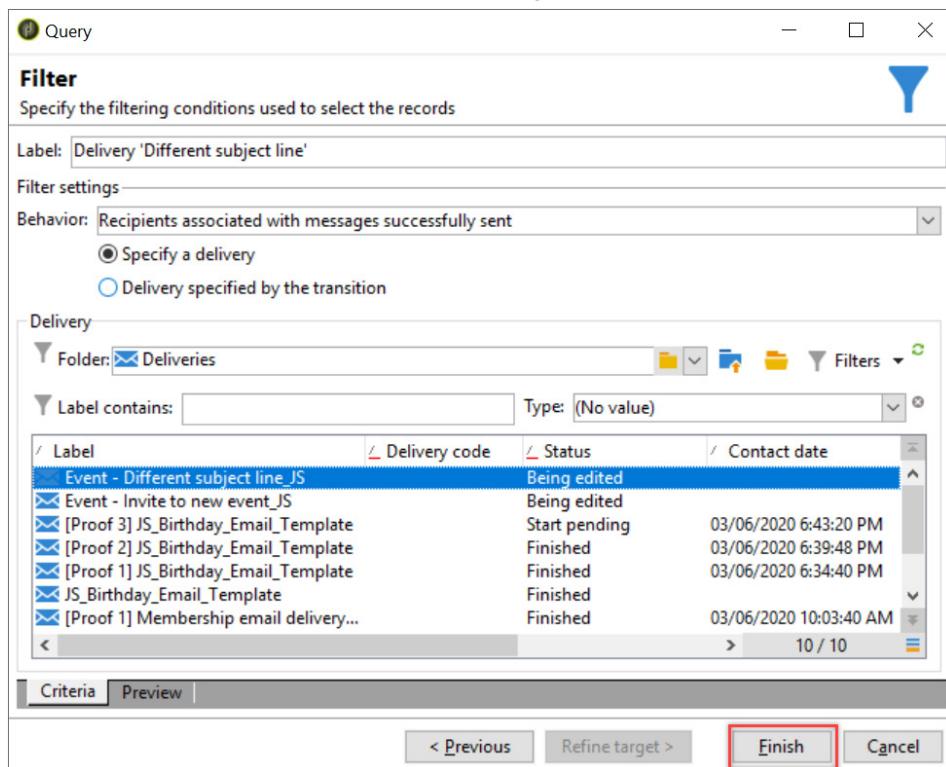
64. Click the **Edit query** link. The **Filter** page opens.

65. In the **Behavior** field, ensure that **Recipients associated with messages successfully sent** is specified.

66. Ensure that the **Specify a delivery** option is selected.

67. In the list of deliveries, select the **Event - Different subject line\_<your initials>** delivery. For example, select **Event - Different subject line\_JS**.

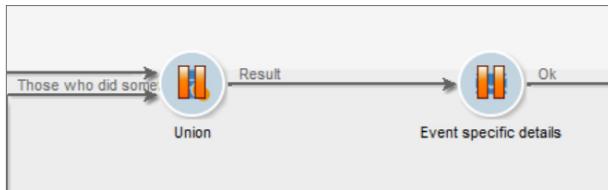
68. Click **Finish**, as shown, to close the **Filter** page.



69. Click **Ok** to go back to the workflow.
70. Click **Save** to save the changes to the workflow.
71. Right-click the second **Split** activity and select **Normal execution**. The second **Split** activity contains two groups and one Complement:
72. Double-click the second **Split** activity. The **Split** dialog box opens.
73. Click the **General** tab. The available options are displayed.
74. In the **Results** sections, ensure that the **Generate complement** option is selected and in the **Label** field, **Left-overs** is specified.
75. Click the **Subsets** tab. The available subsets are displayed.
76. In the **Those who did something** subset, click **Edit**. The **Query** dialog box opens.
77. In the **Behavior** field, ensure **Recipients who have opened or clicked (email)** is specified.
78. Ensure the **Delivery specified by the transition** option is selected.
79. Click **Cancel** to close the **Query** dialog box.
80. Click the **Lazy people** subset tab at the bottom.
81. In the **Label** field, type **Those who did not open or click**.
82. Click **Edit**. The **Query** dialog box opens.
83. In the **Behavior** field, ensure **Recipients who have not opened or clicked (email)** is specified.
84. Ensure the **Delivery specified by the transition** option is selected.
85. Click **Cancel** to close the **Query** dialog box.
86. Click **Ok** to close the **Split** activity. The recipients who do not react to the delivery or who are excluded as part of the complement are routed to an **End 2** activity and will not be targeted anymore.
87. Right-click the **End 2** activity and select **Normal execution**.

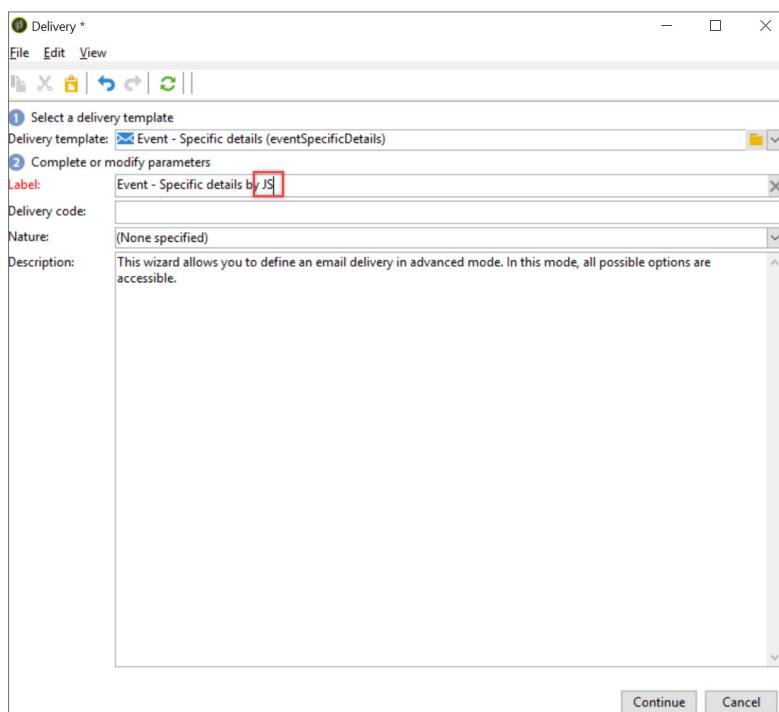
**Part 3: The subscribers who opened the event delivery and the delivery with a separate subject line are combined using the Union activity. A delivery is sent to all recipients who reacted to either of the deliveries.**

This part of the workflow is shown below:



88. Right-click the **Union** activity and select **Normal execution**.
89. Right-click the **Event specific details** delivery activity and select **Normal execution**.
90. Double-click the **Event Specific details** delivery. The **Delivery** dialog box opens.
91. In the **Delivery template** field, select the drop-down arrow and select **Event - Specific details (eventSpecificDetails)**.

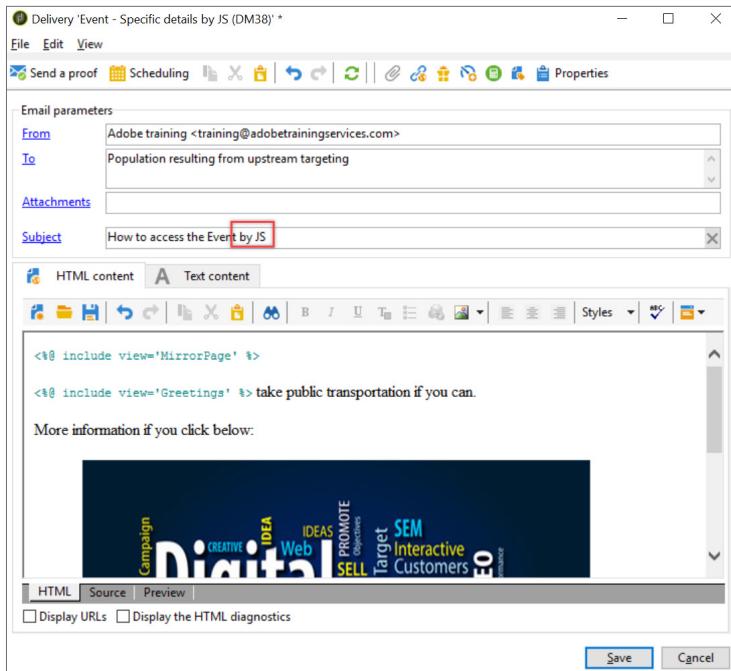
92. In the **Label** field, type **by** and **add <yourinitials>** to the end of the default name, as shown:



93. Click **Continue** to view the email content.
94. Click **Save** to save the delivery.
95. Click **Save** to save the workflow.
96. Click the **Dashboard** tab. The available deliveries are displayed.

97. Click the **Event - Specific details by <your initials>** delivery and then click **Open**. The Delivery dialog box is displayed.

98. In the **Subject** field, type **by** and add **<yourinitials>** to the subject line. For example, add **by JS** to the subject line, as shown:

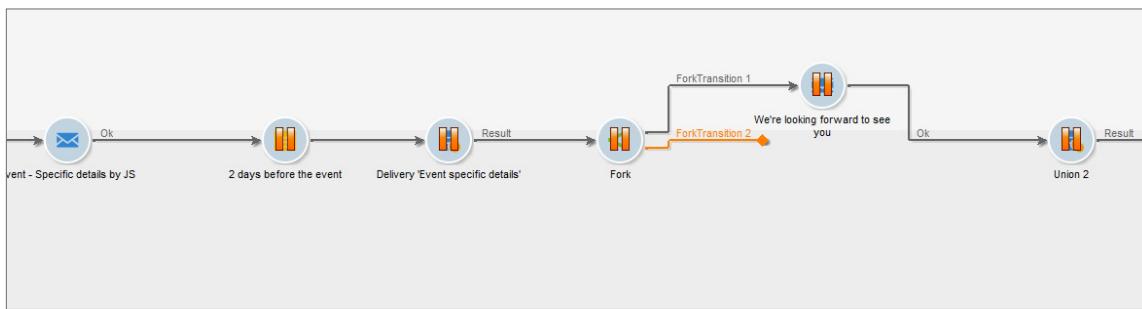


99. Click **Save** to close the Delivery dialog box.

100. Click the **Targeting and workflows** tab to go back to the workflow.

**Part 4: The customers who want to attend the event are sent an email and an SMS that contains teasers about the event.**

This part of the workflow is shown below:



The people who received the **Event - Specific details\_<your initials>** delivery will be targeted four days before the event. The **2 days before the event** Scheduler activity is configured to start the workflow (again) two days *before* the event. We will change the Scheduler activity to target the people two weeks *before* the event.

101. Right-click the **2 days before the event** Scheduler activity and select **Normal execution**.

102.Double-click the **2 days before the event** Scheduler activity. The **Scheduler** dialog box opens.

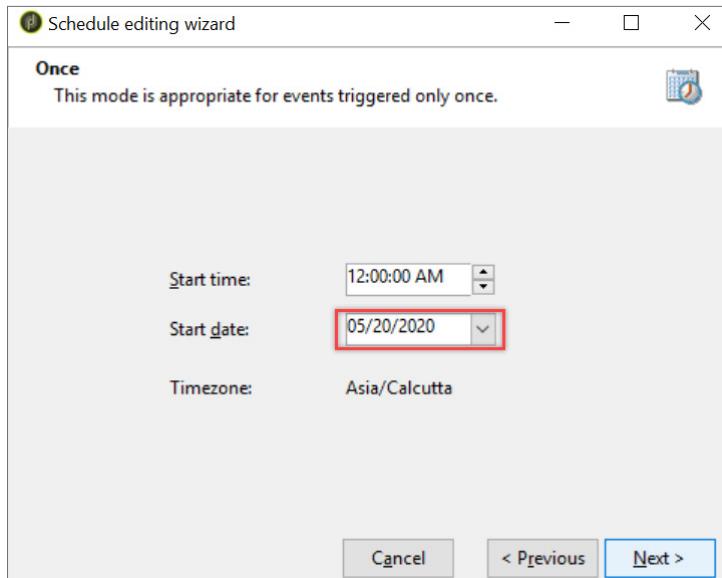
103.In the **Label** field, if not already specified, type **2 weeks before the event**.

104.Click **Change** in the lower-right corner. The **Schedule editing wizard** opens.

105.In the **Select frequency type** page, ensure **Once** is selected.

106.Click **Next**. The **Once** page opens.

107.In the **Start date** field, set a future date, as shown:



108.Click **Next**. The **Summary** page opens.

109.Review the summary of the launch times and then click **Finish**.

110. Click **Ok** to close the **Scheduler** dialog box.

111. Right-click the **Delivery 'Event specific details'** delivery activity and select **Normal execution**.

The **Delivery 'Event specific details'** is configured to retrieve the recipients who successfully received the **Event - Specific details** delivery.

112.Double-click **Delivery 'Event specific details'**. The **Query** dialog box opens.

113.Click the **Edit query** link.

114.In the **Behavior** field, ensure **Recipients associated with messages successfully sent** is specified.

115.Ensure that the **Specify a delivery** option is selected.

116. In the list of deliveries, select **Event - Specific details\_<your initials>**. For example, select **Event - Specific details\_JS**.

117.Click **Finish** to close the **Filter** page.

118. Click **Ok** to go back to the workflow.

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

A **Fork** activity is connected to the **Delivery Event - Specific details\_<your initials>** Query activity. The **Fork** activity enables you to duplicate the recipients to send them an email and an SMS delivery.

120. Right-click the **Fork** activity and select **Normal execution**. There are two transitions going out from the **Fork** activity. One transition is connected to the **We're looking forward to see you** email delivery (on the top) and the other transition is connected to the **We're looking forward to see you** SMS delivery (on the bottom). These deliveries will be sent to the recipients who reacted to the previous deliveries.

121. Right-click the **We're looking forward to see you** email delivery and select **Normal execution**.

122. Double-click the **We're looking forward to see you** email delivery. The **Delivery** dialog box opens.

123. In the **Delivery template** field, click the drop-down arrow and select **Event - We're looking forward to see you (eventWeAreLookingForwardToSeeYouEmail)**.

124. In the **Label** field, type \_<your initials> at the end of the name. For example, **Event email - We're looking forward to seeing you \_JS**.

125. Click **Continue** to view the email content.

126. Click **Save** to save the delivery.

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

128. Click the **Dashboard** tab. The available deliveries are displayed, as shown:

The campaign was started on 03/07/2020

Status: In progress (started on 03/07/2020)  
Type: Unique  
Schedule: From 03/07/2020 to 03/12/2020  
Program: Campaign Management > Retargeting\_JS  
Assigned to: Administrator (admin)

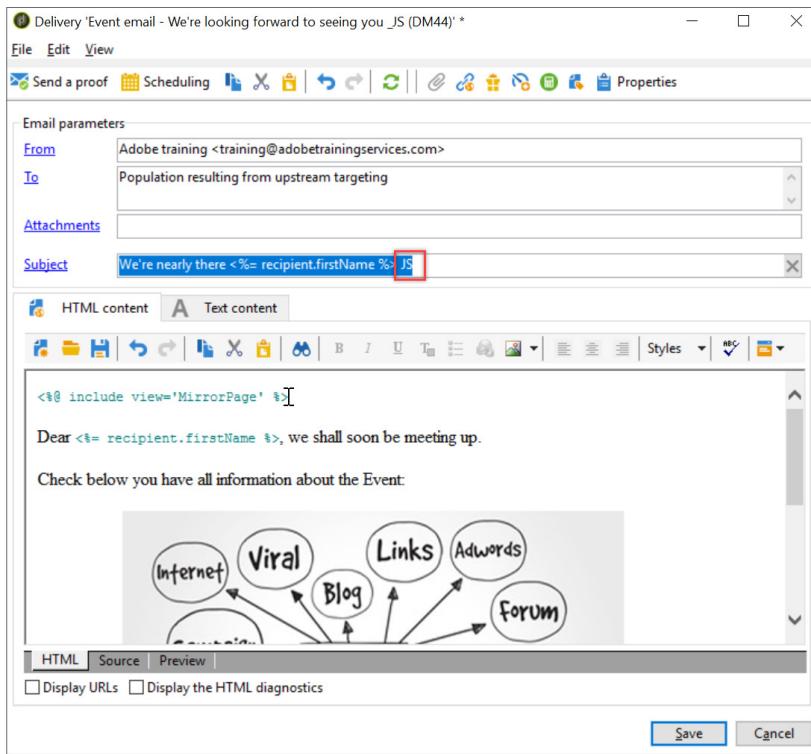
Action(s) on the campaign:  
Add a delivery      Add a document

Deliveries

Delivery Type	Status
Event email - We're looking forward to seeing you _JS (DM44)	Being edited
Event - Specific details by JS (DM38)	Being edited
Event - Different subject line_JS (DM34)	Being edited
Event - Invite to new event_JS (DM30)	Being edited

129. Click the **Event email - We're looking forward to seeing you\_JS** delivery and then click **Open**. The Delivery dialog box opens.

130. In the **Subject** field, add \_your initials after the **Subject** line, as shown:

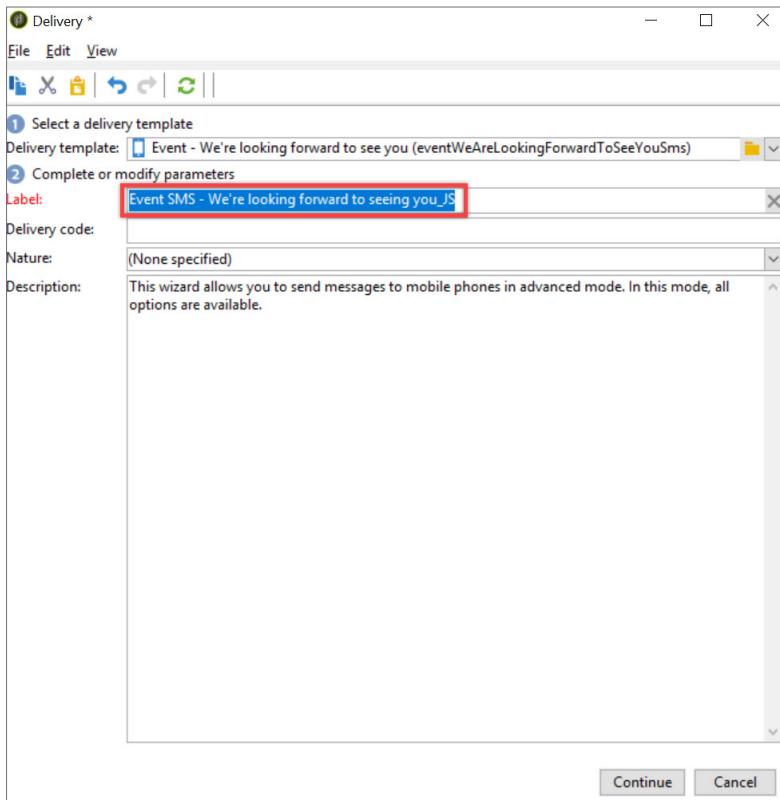


131. Click **Save** to close the Delivery dialog box.

132. Click the **Targeting and workflows** tab to go back to the workflow.
133. Right-click the **We're looking forward to see you** SMS delivery and select **Normal execution**.
134. Double-click the **We're looking forward to see you** SMS delivery. The **Delivery** dialog box opens.
135. In the **Delivery template** field, click the drop-down arrow and select **Event - We're looking forward to see you (eventWeAreLookingForwardToSeeYouSms)**.

136. In the **Label** field, type **Event SMS - We're looking forward to seeing you\_<your initials>**.

For example, type **Event SMS - We're looking forward to seeing you\_JS**, as shown:



137. Click **Continue** to view the email content.

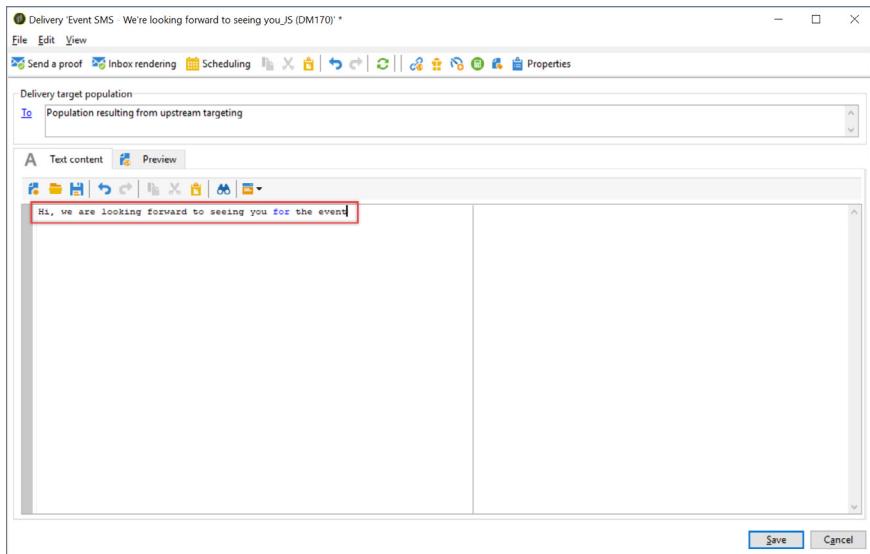
138. Click **Save** to save the delivery.

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

140. Click the **Dashboard** tab. The available deliveries are displayed in the **Deliveries** section.

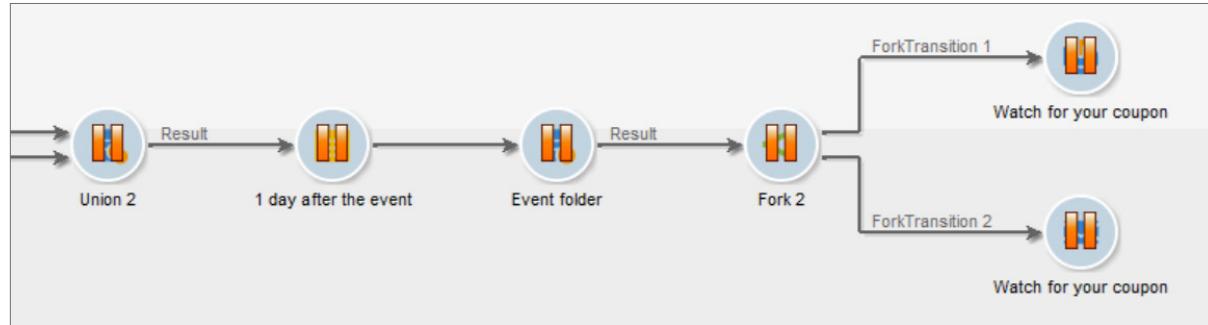
141. Click the **Event SMS - We're looking forward to seeing you\_<your initials>** delivery and then click **Open**. The Delivery dialog box opens.

142. In the **Text content** section, delete the existing content and type **Hi, we are looking forward to seeing you for the event**, as shown:



143. Click **Save** to close the Delivery dialog box.
144. Click the **Targeting and workflows** tab to go back to the workflow.

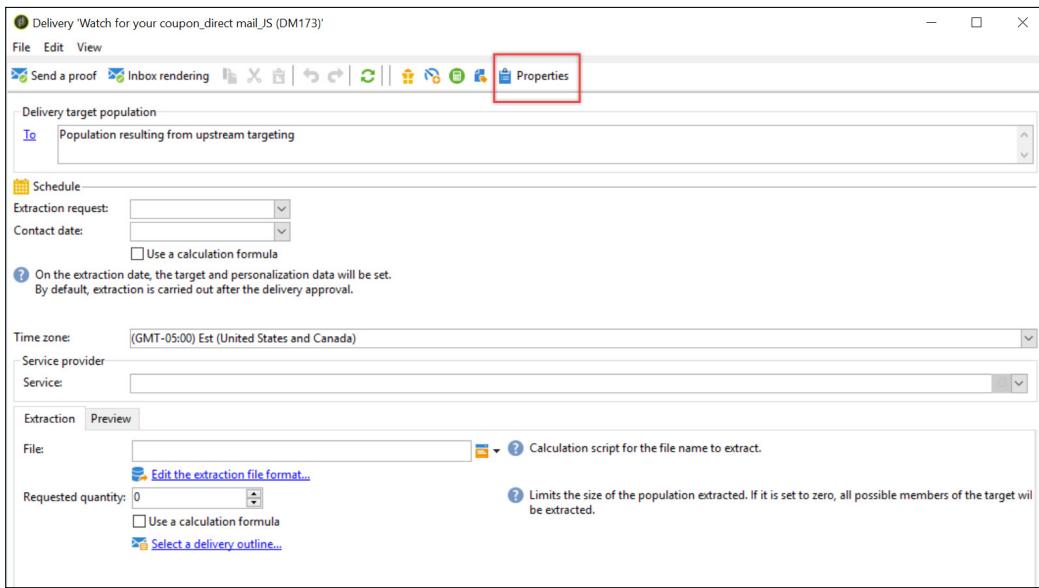
#### **Part 5: The customers who will attend the event are sent a coupon by email and direct mail to show at the event.**



145. Right-click the **Union 2** activity and select **Normal execution**. The **Union 2** activity groups the recipients of the email delivery and the SMS delivery who were targeted.
146. Right-click the **1 day after the event** Scheduler activity and select **Normal execution**. The **1 day after the event** Scheduler activity is configured in the workflow to begin one day before the event. You need to configure the Scheduler activity to send the email and direct mail three days before the event. So, you need to update the activity.
147. Double-click the **1 day after the event** Scheduler activity. The **Scheduler** dialog box opens.
148. In the **Label** field, type **3 days before the event**.
149. Click **Change** in the lower-right corner. The **Schedule editing wizard** opens.

150. Ensure the **Once** option is selected.
151. Click **Next**. The **Once** page opens.
152. In the **Start date** field, select a future date.
153. Click **Next**. The **Summary** page opens.
154. Review the schedule and click **Finish**.
155. Click **Ok** to close the **Scheduler** dialog box.
156. Click **Save** to save the workflow.
157. Right-click the **Event folder** query activity and select **Normal execution**. The Query retrieves the recipients who have successfully received the previous delivery. For this exercise, the **Training** folder is configured for all targeted delegates.
158. Double-click **Event folder** query activity. The **Query** dialog box opens.
159. Click the **Edit query** link. The **Filter** page opens.
160. Select the **Training** folder.
161. Click **Finish** to close the **Filter** page.
162. Click **Ok** to close the **Query** dialog box.
163. Right-click the **Fork 2** activity and select **Normal execution**. The **Fork 2** activity will duplicate the recipients from the inbound transition to an email and a direct mail.
164. Right-click the **Watch for your coupon** direct mail delivery and select **Normal execution**. The **Direct mail** delivery will be used to create a file with the details of the recipients who will receive the event coupons by mail.
165. Double-click the **Watch for your coupon** direct mail delivery. The **Delivery** dialog box opens.
166. In the **Label** field, type **Watch for your coupon\_direct mail\_<your initials>**. For example, type **Watch for your coupon\_direct mail\_JS**.
167. Click **Continue**. The page to edit the delivery opens.
168. Click **Save** to close the **Delivery** dialog box.
169. Click **Save** to save the workflow.
170. Click the **Dashboard** tab. The available deliveries are displayed in the **Deliveries** section.
171. Click the **Watch for your coupon\_direct mail\_<your initials>** delivery and then click **Open**. The Delivery dialog box opens.

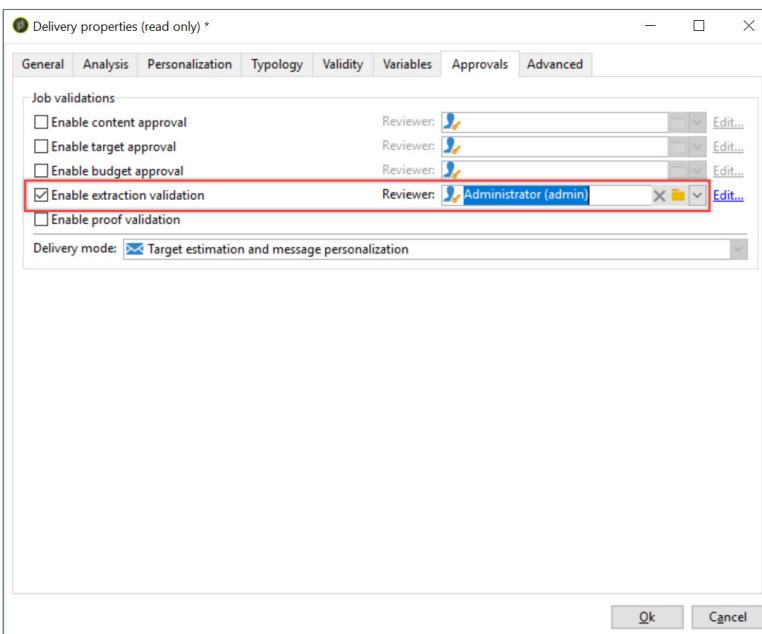
172. Click **Properties**, as shown, The **Delivery properties** dialog box opens.



173. Click the **Approvals** tab. The available options are displayed.

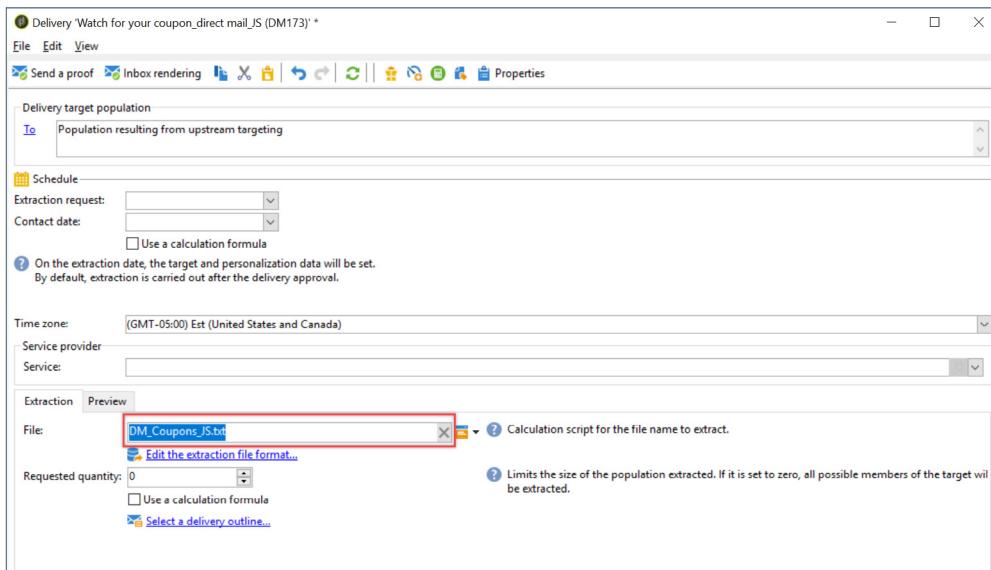
174. Select the **Enable extraction validation** checkbox.

175. In the **Reviewer** field parallel to the **Enable extraction validation** checkbox, click the drop-down arrow and select your name. If your name is not available, select your instructor's name, as shown:



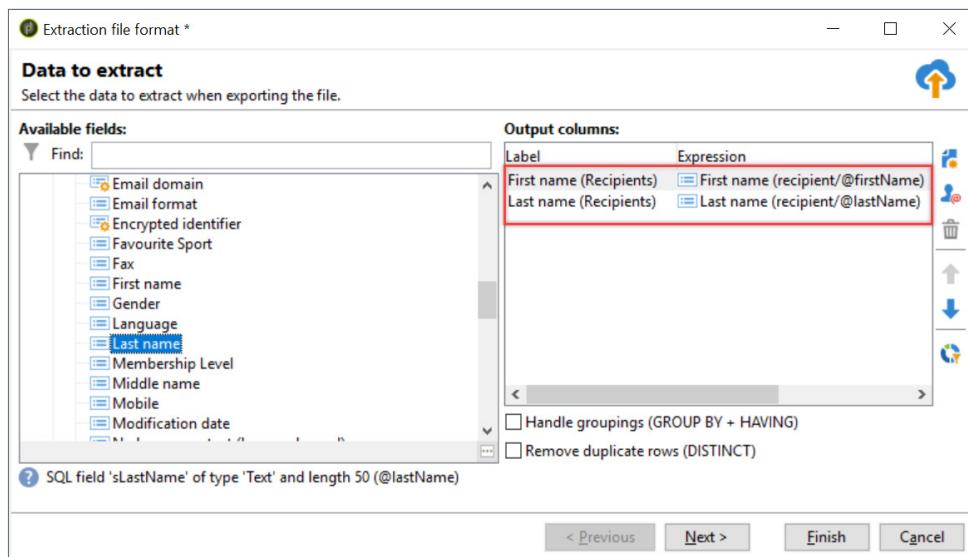
176. Click **Ok** to go back to the **Delivery** dialog box.

177. Type **DM\_Coupons\_<your initials>.txt** as the file name in the **File** field. For example, type **DM\_Coupons\_JS.txt**, as shown:

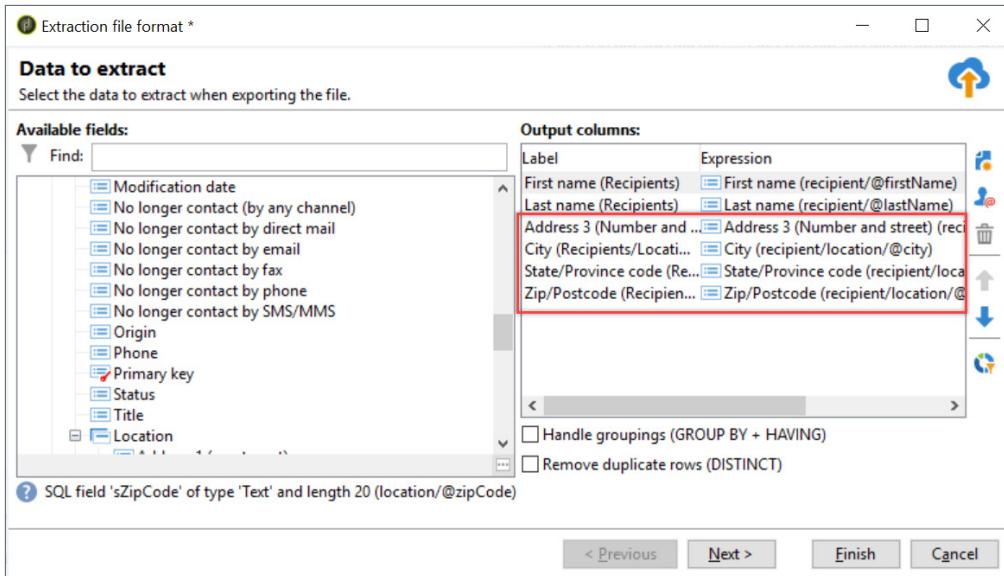


178. Click the **Edit the extraction file format** link. The **Extraction file format** dialog box opens.

179. In the **Available fields** section, expand **Recipients** and double-click **First name** and **Last name** to add the fields to the **Output columns** section. The fields are added to the **Output columns**, as shown:

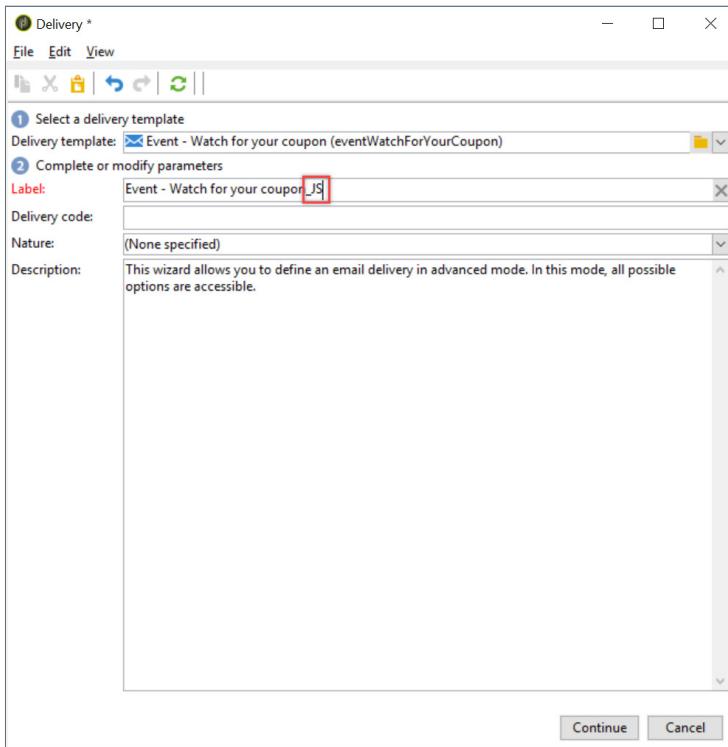


180. Expand **Location** and double-click **Address 3 (Number and street), City, State/Province code, Zip/Post code** to add the fields to the **Output columns** section, as shown:



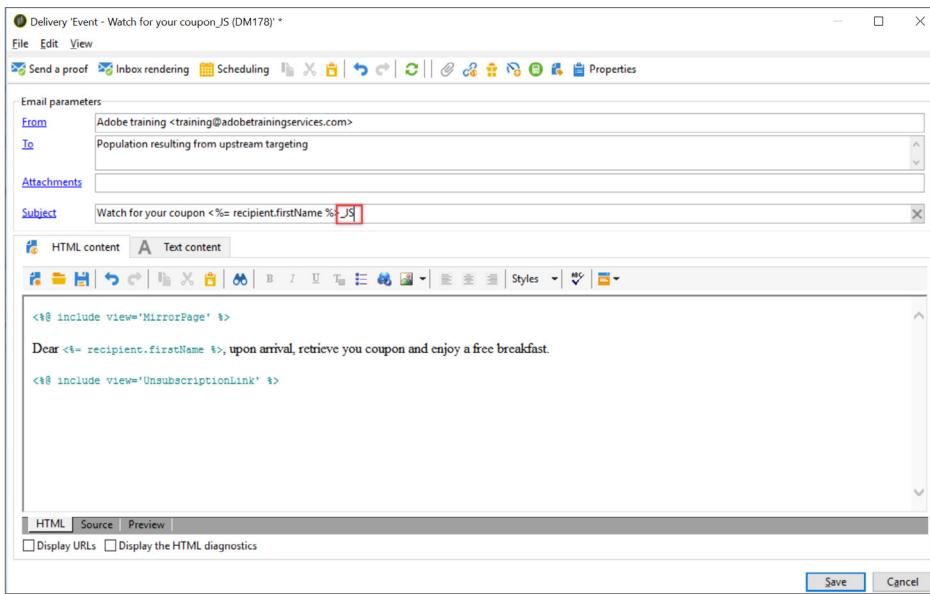
181. Click **Next**. The **Sorting** page opens.
182. Click **Next**. The **Destination format** page opens.
183. Click **Next**. The **Data formatting** page opens.
184. Click **Finish** to go back to the Delivery dialog box.
185. Click **Save** to close the Delivery dialog box.
186. Click the **Targeting and workflows** tab to go back to the workflow.
187. Right-click the **Watch for your coupon** email delivery and select **Normal execution**.
188. Double-click the **Watch for your coupon** email delivery. The **Delivery** dialog box opens.
189. In the **Delivery template** field, click the drop-down arrow and select the **Event - Watch for your coupon (eventWatchForYourCoupon)** template.

190. In the **Label** field, add \_<your initials> to the end of the default label, as shown:



191. Click **Continue**. The page to view the email content opens.
192. Click **Save** to save the delivery.
193. Click **Save** to save the workflow.
194. Click the **Dashboard** tab to view the deliveries.
195. Click the **Event - Watch for your coupon\_<your initials>** delivery and then click **Open**. The Delivery dialog box opens.

196. In the **Subject** line, add \_<your initials> at the end of the subject line, as shown:



197. Click **Save** to close the Delivery dialog box.
198. Click the **Targeting and workflows** tab to go back to the workflow.

### Task 3: Execute the retargeting campaign

1. Click the **Start** icon to start the workflow.
2. Click **Dashboard** to view the list of deliveries in the **Delivery** section.
3. Click the **Event - Invite to new event\_<your initials>** delivery. The Delivery details are displayed, as shown:

Delivery	
Status:	Event - Invite to new event_JS (DM154)
Status:	Pending confirmation
Channel:	Email
Content status:	Analyzed
Contact date:	(immediately)
Targeting:	Event (WKF54)
Target population:	0
Messages to send:	0
Proof(s):	Inbox rendering...

4. Click **Confirm delivery**. A prompt is displayed.
5. Click **OK** to start the delivery. The subscribers will receive an email shortly.

6. Update the tracking logs:

- In the **Explorer** view, go to **Administration > Production > Technical workflows**.
- Select the **Tracking** workflow. The workflow is displayed in the details view.
- Right-click the **Scheduler** activity and select **Execute pending task(s) now**.
- Click the **Restart** button to restart the technical workflow.
- When prompted to stop the workflow and cancel all activities in progress, click **Yes**.

7. Click the Campaign tab to go back to the campaign, as shown:

The screenshot shows the Oracle Marketing Cloud Service interface. On the left, the navigation pane is open with categories like Administration, Production, and Resources. In the center, there's a table titled 'Technical workflows (By name or label)' with columns for Label, Internal name, Status, Failed, Last processing, and Next p. One row is selected: 'Label: Tracking, Internal name: tracking, Status: Started, Failed: No, Last processing: 04/01/2020 6:00:07 AM, Next p: 04/01/2020 6:00:07 AM'. Below this is a 'Workflow 'Tracking (tracking)'' section with a diagram showing three states: Scheduler, Tracking, and End, connected by arrows. A sidebar on the left shows various audit-related icons.

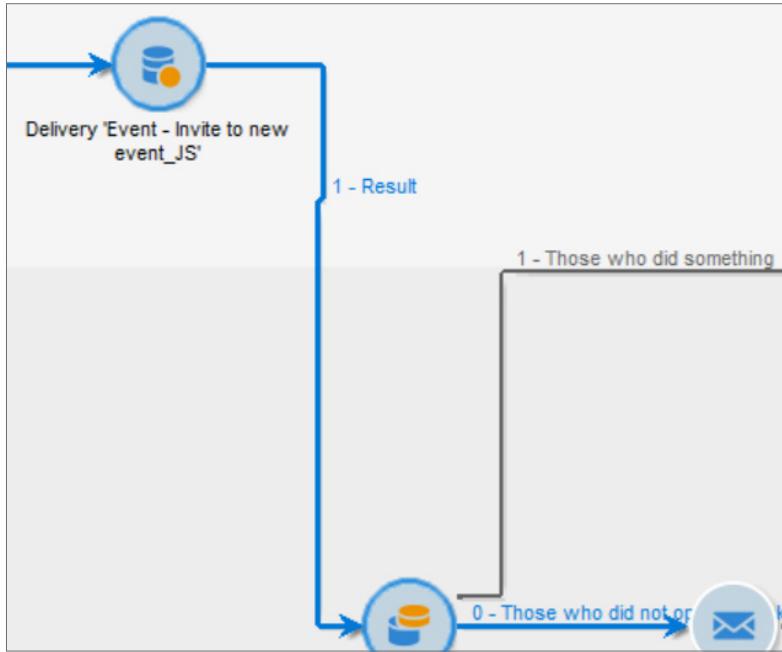
8. Click the **Event - Invite to new event\_<your initials> delivery**.

9. Click **Open**. The Delivery dialog box opens.

10. Click the **Tracking** tab to view the number of recipients who opened the email delivery, as shown:

The screenshot shows the 'Delivery' dialog box for a specific delivery named 'Copy of Event - Invite to new event\_JS (DM132)'. The left sidebar has tabs for Scheduling, Logs, URLs, Summary, Email, Delivery, Tracking, Inbox Rendering, and Audit. The 'Logs' tab is selected, showing a table titled 'Tracking logs of the delivery' with columns Date, Label, Type, and Recipients. Three log entries are listed: '04/08/2020 3:15:42 ...' (Email click), '04/08/2020 3:15:30 ...' (Email click), and '04/08/2020 3:15:26 ... Open'. The 'Recipients' column contains redacted email addresses. At the bottom right, there are 'Save' and 'Close' buttons.

11. Click **Close** to close the **Delivery** dialog box. The first **4 days** wait activity starts blinking.
12. Right-click the first **4 days** wait activity and select **Execute pending task(s) now**.
13. Verify the results that generated from the first **Split** activity, as shown:



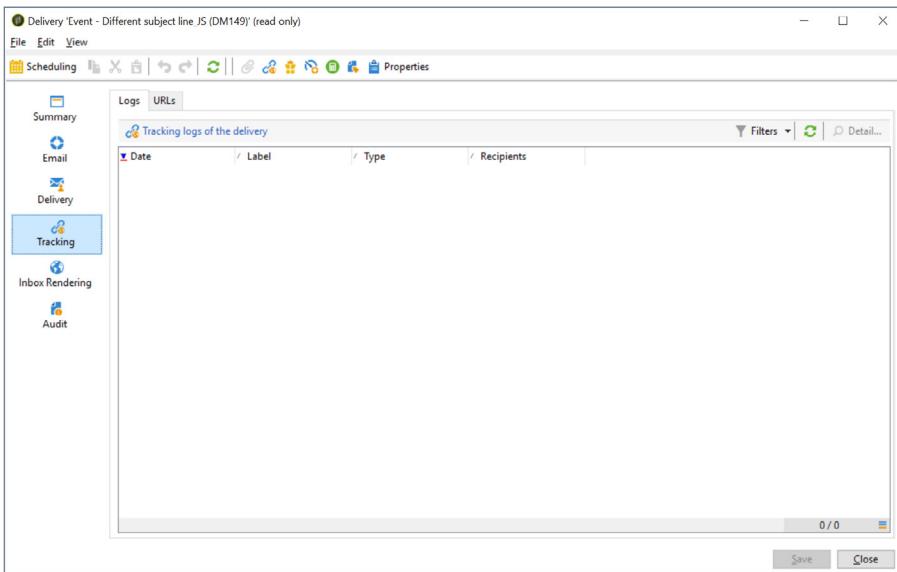
**Note:** The results may vary from the result shown above based on the profiles with required criteria.

14. Click the **Dashboard** tab to view the list of deliveries.
15. Click the **Event - Different subject line\_<yourinitials>** delivery. The Delivery details are displayed.
16. Click **Confirm delivery**. A prompt is displayed.
17. Click **OK** to start the delivery. The recipients who did not open the previous mail will now receive another mail.
18. Wait for some time and update the tracking logs:
  - a. In the **Explorer** view, go to **Administration > Production > Technical workflows**.
  - b. Select the **Tracking** workflow. The workflow is displayed in the details view.
  - c. Click **Restart** to restart the delivery.
  - d. Right-click the **Scheduler** activity and select **Execute pending task(s) now**.
  - e. When prompted to stop the workflow and cancel all activities in progress, click **Yes**.
19. Click the **Campaign** tab to go back to the campaign.
20. Right-click **Event - Different subject line\_<your initials>** delivery and select **Execute pending task(s) now**.

21. On the **Dashboard** tab, click the **Event - Different subject line\_<your initials>** delivery in the **Deliveries** section. The Delivery details are displayed.

22. Click **Open**. The Delivery dialog box opens.

23. Click the **Tracking** tab to view the recipients who opened the **Event - Different subject line\_<your initials>** delivery, as shown:

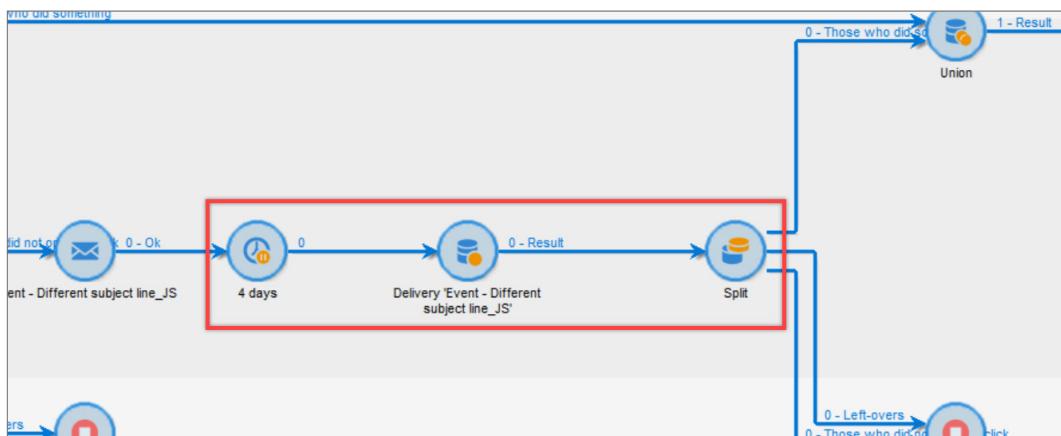


**Note:** The tracking log is empty as there are no recipients who did not open the mail.

24. Click **Close** to close the Delivery dialog box.

25. Click the **Targeting and workflows** tab to go back to the workflow.

26. Right-click the second **4 days** wait activity that is connected to the **Event - Different subject line\_<your initials>** delivery and select **Execute pending task(s) now**. The **4 days** wait activity executes the task and the Delivery Event different subject line\_<your initials> activity updates the tracking data and then sends data to the second **Split** activity, as shown:



27. At the second **Split** activity level, verify the number of recipients in the **Those who did something** transition line is updated.
28. Open the **Dashboard** tab and click the **Event – Specific details\_<your initials>** delivery. For example, click **Event - Specific details\_JS**, as shown. The delivery details are displayed.

Delivery Type	Description	Status
Event - Specific details_JS	(DM153)	Pending confirmation
Event - Different subject line_JS	(DM149)	Finished
Event - Invite to new event_JS	(DM145)	Finished
Event - Watch for your coupon_JS	(DM168)	Being edited
Event - Watch for your coupon_direct mail_JS	(DM164)	Being edited
Event SMS - We're looking forward to seeing you_JS	(DM161)	Being edited
Event email - We're looking forward to seeing you_JS	(DM157)	Being edited

29. Click **Confirm delivery** to send the delivery. A prompt is displayed.
30. Click **OK** to confirm the action. The deliveries are sent to the recipients.
31. Click the **Targeting and workflows** tab. Notice that the **2 weeks before the event** Scheduler activity starts blinking.
32. Right-click the **2 weeks before the event** Scheduler activity and select **Execute pending task(s) now**. The activity executes the tasks and moves to the **Event - We are looking forward to see you\_<your initials>** email and SMS deliveries.

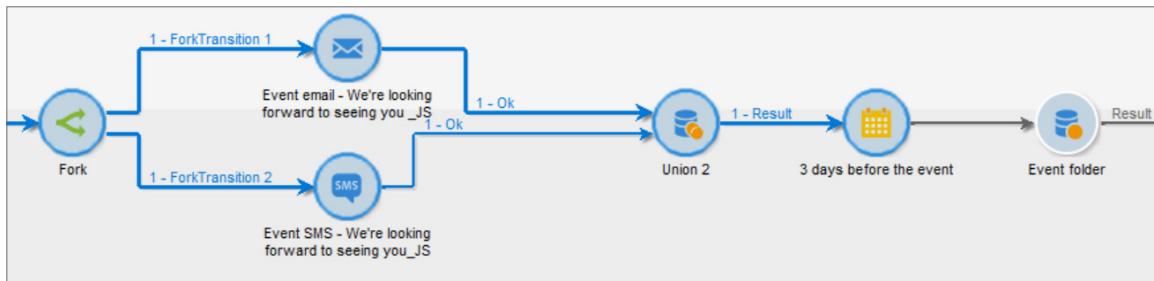
33. Open the **Dashboard** tab to view the deliveries, as shown:

Delivery Type	Description	Status
Event SMS	- We're looking forward to seeing you_JS (DM161)	Pending confirmation
Event email	- We're looking forward to seeing you_JS (DM157)	Pending confirmation
Event - Specific details_JS	(DM153)	Finished
Event - Different subject line_JS	(DM149)	Finished
Event - Invite to new event_JS	(DM145)	Finished
Event - Watch for your coupon_JS	(DM168)	Being edited
Event - Watch for your coupon_direct mail_JS	(DM164)	Being edited

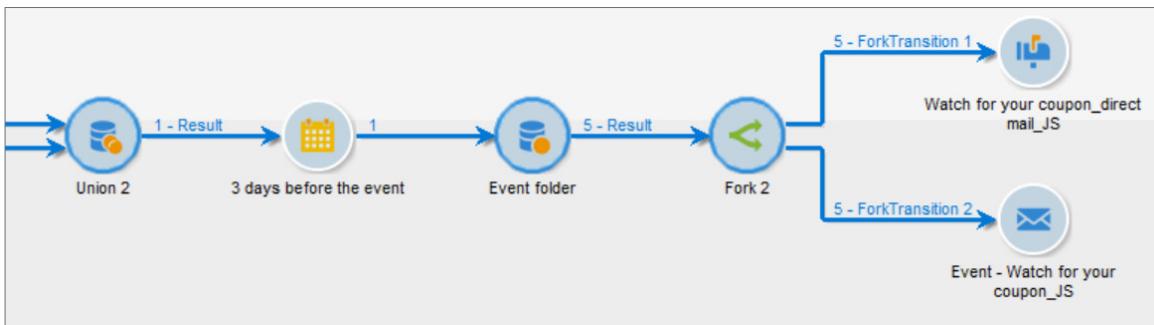
34. Click the email delivery and the SMS delivery, and click the **Confirm delivery** button for each delivery. A prompt is displayed for each delivery.

35. Click **OK** to confirm the action for each delivery. The SMS and email deliveries are sent and the **3 days before the event** Scheduler activity starts blinking.

36. Click the **Targeting and workflows** tab to go back to the workflow, as shown:



37. Right-click the **3 days before the event** Scheduler activity and select **Execute pending task(s) now**. The **3 days before the event** Scheduler activity executes the task, and the direct mail and email deliveries start blinking as it is awaiting approval, as shown:



**Note:** The results may vary from the result shown above.

38. Click the **Dashboard** tab to view the deliveries, as shown:

Delivery Type	Status
Event - Watch for your coupon_JS (DM248)	Pending confirmation File to approve
Watch for your coupon_direct mail_JS (DM244)	Pending confirmation File to approve
Event email - We're looking forward to seeing you _JS (DM237)	Finished
Event SMS - We're looking forward to seeing you _JS (DM241)	Finished
Event - Specific details_JS (DM233)	Finished
Event - Different subject line_JS (DM229)	Finished
Event - Invite to new event_JS (DM225)	Finished

39. Click the **Event - Watch for your coupon\_<your initials>** email delivery to view the details.

40. Click **Confirm delivery**. A prompt is displayed.
41. Click **OK** to send the delivery. The recipients will receive coupons in their registered email ID.
42. Click the **Watch for your coupon\_direct mail\_<your initials>** delivery to view the details, as shown:

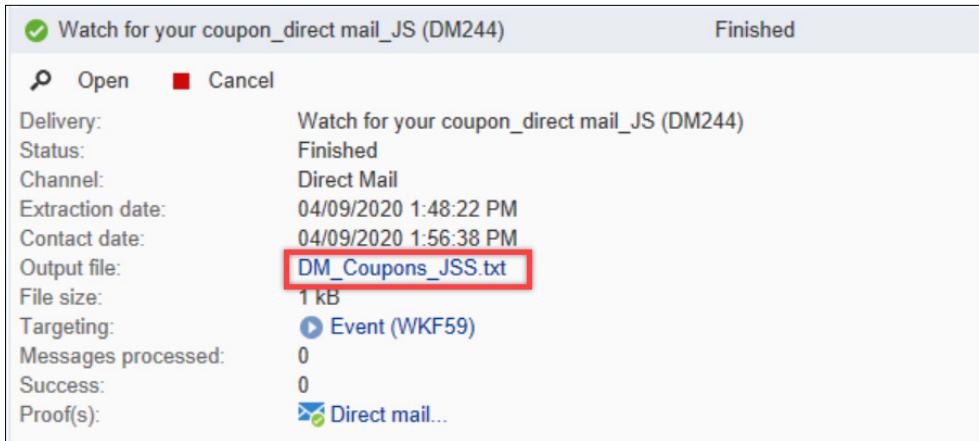
The screenshot shows the 'Targeting and workflows' section of the software. On the left, there's a summary of the campaign: Status: In progress (started on 04/09/2020), Type: Unique, Schedule: From 04/09/2020 to 04/14/2020, Program: Campaign Management > Retargeting\_JS, Assigned to: Administrator (admin). Below this are buttons for 'Action(s) on the campaign': Add a delivery, Add a task, and Add a document. Under 'Tasks', it says 'No data.' On the right, there's a 'Deliveries' list. One item is highlighted with a red box: 'Watch for your coupon\_direct mail\_JS (DM244)' with the status 'File to approve'. Other items in the list include 'Event - Watch for your coupon\_JS (DM248)', 'Event email - We're looking forward to seeing you\_JS (DM237)', 'Event SMS - We're looking forward to seeing you\_JS (DM241)', and 'Event - Specific details\_JS (DM233)'. At the top right of the deliveries list, there are buttons for 'Open', 'Approval' (with a dropdown menu), and 'Stop'.

You would have received an approval mail to approve the extraction file.

43. Click the **Approval** dropdown and select **Approve File** to approve the extraction file. The **Action on delivery** window opens.
44. Click **File approval**, as shown:

The screenshot shows the 'Action on delivery' window. It displays the following details for the main delivery: Main delivery: Watch for your cou...ect mail\_JS (DM244), Channel: Direct Mail, Approval deadline: 04/12/2020, Campaign: Event Campaign (OP48), Extraction date: 04/09/2020 1:48:22 PM, Contact date: (immediately), Output file: DM\_Coupons\_JSS.txt. Below this, it asks 'Please select an action and then confirm your choice:' with two radio buttons: 'Accept' (selected) and 'Reject'. There is a 'Comment:' text area and a large text input area. At the bottom, a button labeled 'File approval' is highlighted with a red box.

45. Click the **Watch for your coupon\_direct mail\_<your initials>** delivery and click the **Output file**, link as shown, to view the details:



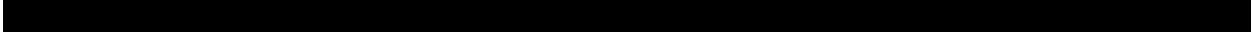
46. Go back to the campaign **Dashboard** tab. In the **Deliveries** section, the status of the delivery changes to **Finished**, as shown:

The screenshot shows the "Event Campaign (OP48)" dashboard. The "Deliveries" section lists several items, all of which are marked as "Finished": "Watch for your coupon\_direct mail\_JS (DM244)", "Event - Watch for your coupon\_JS (DM248)", "Event email - We're looking forward to seeing you\_JS (DM237)", "Event SMS - We're looking forward to seeing you\_JS (DM241)", "Event - Specific details\_JS (DM233)", "Event - Different subject line\_JS (DM229)", and "Event - Invite to new event\_JS (DM225)".

The event campaign delivery is completed.

## Module 5

# A/B Testing



### Introduction

To be successful with digital marketing, you must provide the right content to customers. To do this, you should evaluate your campaigns and modify them based on your evaluation.

Adobe Campaign Classic enables you to create different versions of your campaigns and analyze which campaign generates more responses from customers. This will help you identify the most effective campaign that attracts and creates more conversion rates.

### Objectives

After completing this module, you will be able to:

- Describe A/B testing in Campaign Classic
- Perform A/B testing in Campaign Classic

# A/B Testing in Campaign Classic

---

A/B testing enables you to:

- Compare different types of deliveries to determine which delivery has a better response, such as open, click, and conversion rates
- Compare creative layouts, link texts, and images, or any other aspect of a delivery

You can use a Split activity to set up A/B tests in Campaign Classic. The Split activity enables you to configure subgroups based on:

- Random sampling of a population
- Filtering conditions

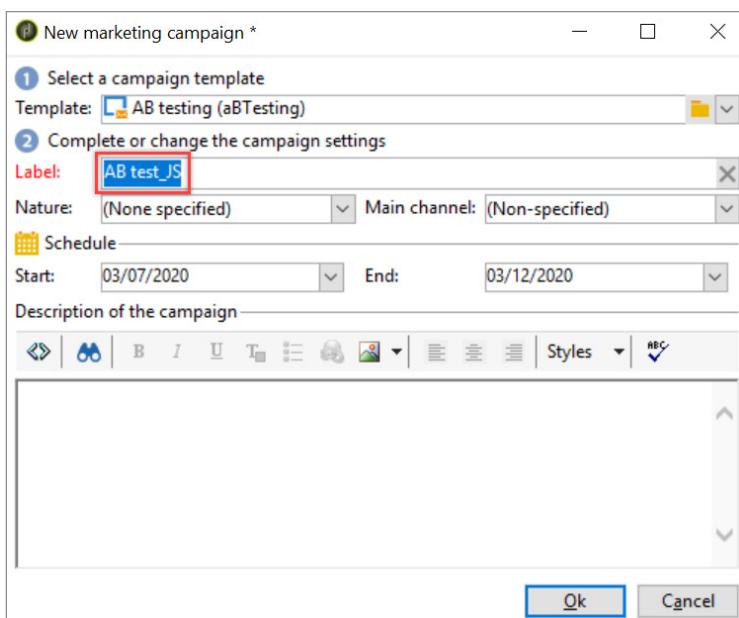
JavaScript is used to automatically select the campaign that generates more conversions from customers.

## Exercise 1: Perform A/B testing

---

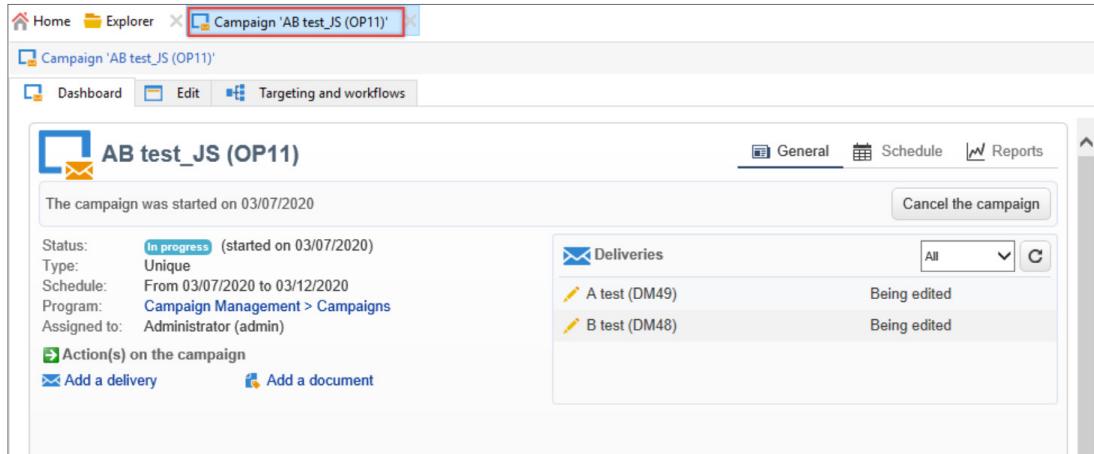
**Scenario:** We.Retail is launching a new campaign for their winter collections. You are asked to test two different campaign deliveries to evaluate the campaign that generates the highest amount of responses from the customers. You need to compare two email deliveries with the same content but a different subject line by using a targeting workflow. The targeted population is divided into three groups, two test groups and the remaining population. In this exercise, different versions of the delivery will be sent to each test group. After the delivery, a waiting period will be configured before collecting the results of the best open rates. The content of the delivery with the highest score is then recovered by a script and sent to the population that were not used as a test group.

1. In the Explorer view, navigate to **Campaign Management > Campaigns**. The available campaigns open in the list view.
2. Click the **New** icon. The **New marketing campaign** dialog box opens.
3. In the **Template** field, click the drop-down arrow and select **AB testing (aBTesting)**.
4. In the **Label** field, type **AB test\_<your initials>** as the name of the campaign. For example, type **AB test\_JS**, as shown:

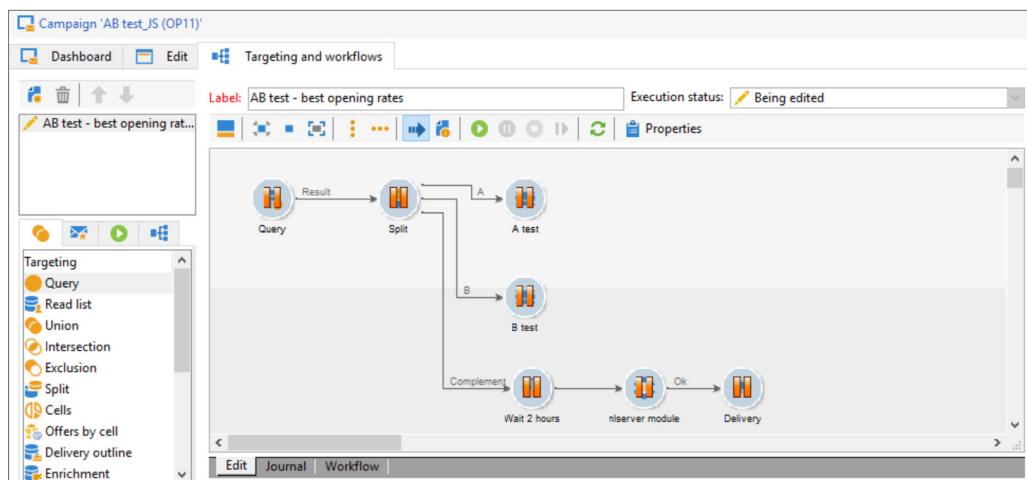


5. Click **Ok**. The new campaign is displayed in the list view.

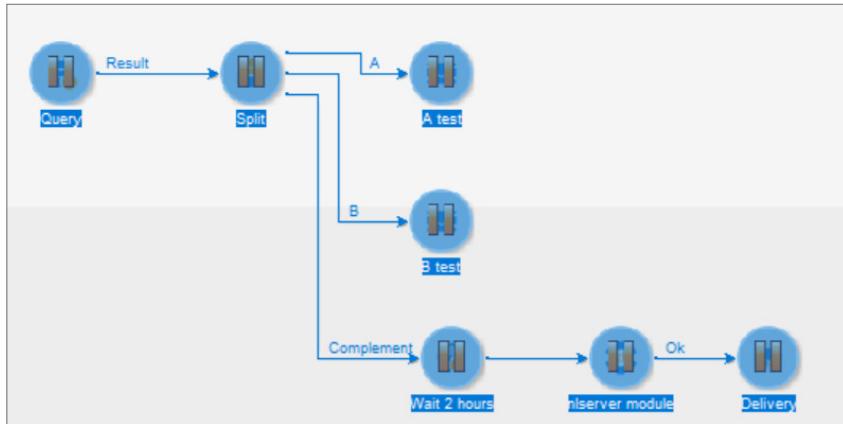
6. Double-click the campaign you just created. The campaign opens in the navigation bar, as shown:



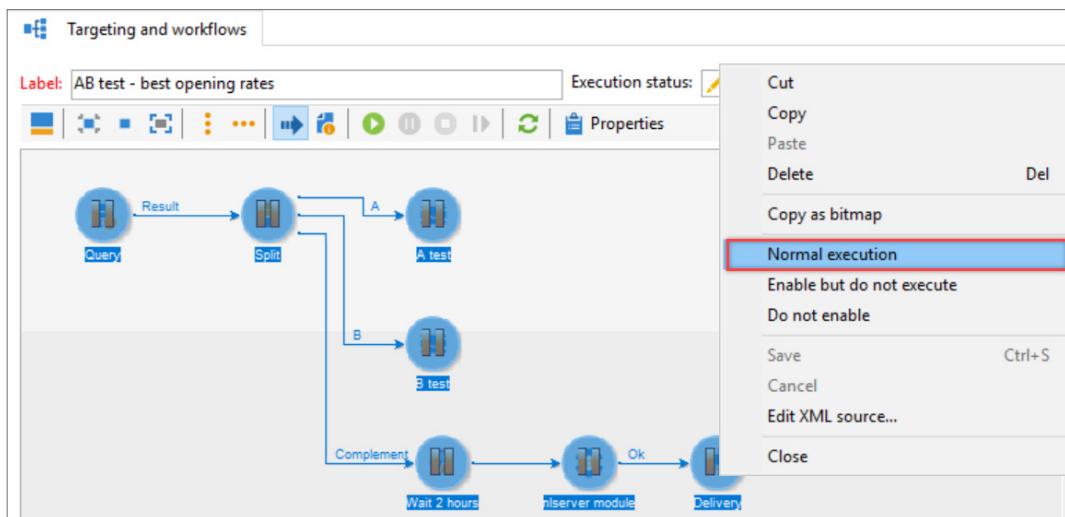
7. Click the **Targeting and workflows** tab. Notice that the workflow already exists because you selected the **AB testing (aBTesting)** template earlier.



8. Press the **Ctrl+left-click** on each activity to select all the activities. The activities are highlighted in blue, as shown:



9. Right-click any of the selected activities, as shown, and select **Normal execution**. The workflow is updated.



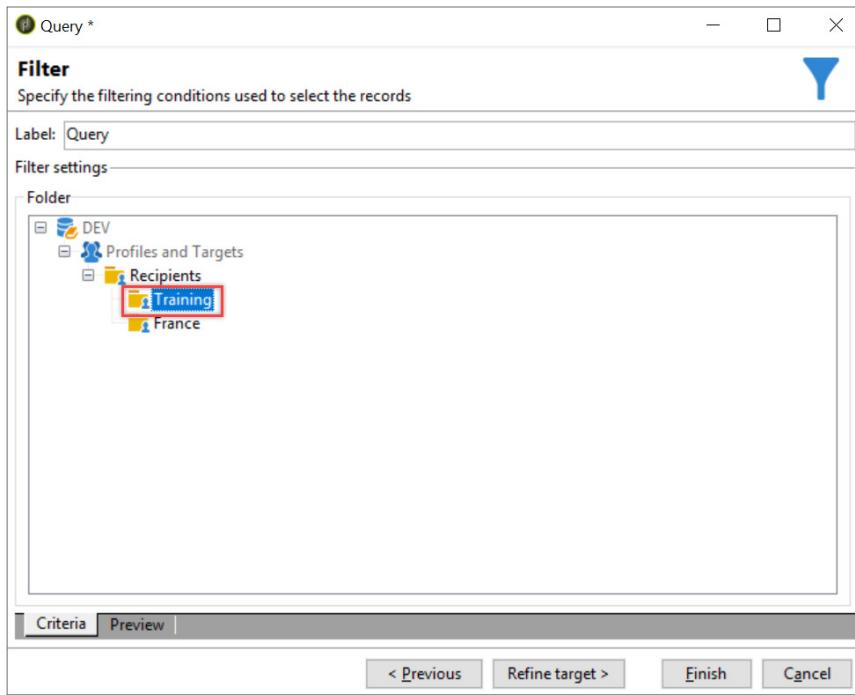
10. Click anywhere on the workspace and then click **Save** to save the workflow.

11. Double-click the **Query** activity. The **Query** dialog box opens.

12. Click the **Edit query** link. The **Targeting and filtering dimension** page opens.

13. Select **Recipients included in a folder** and then click **Next**. The **Filter** page opens.

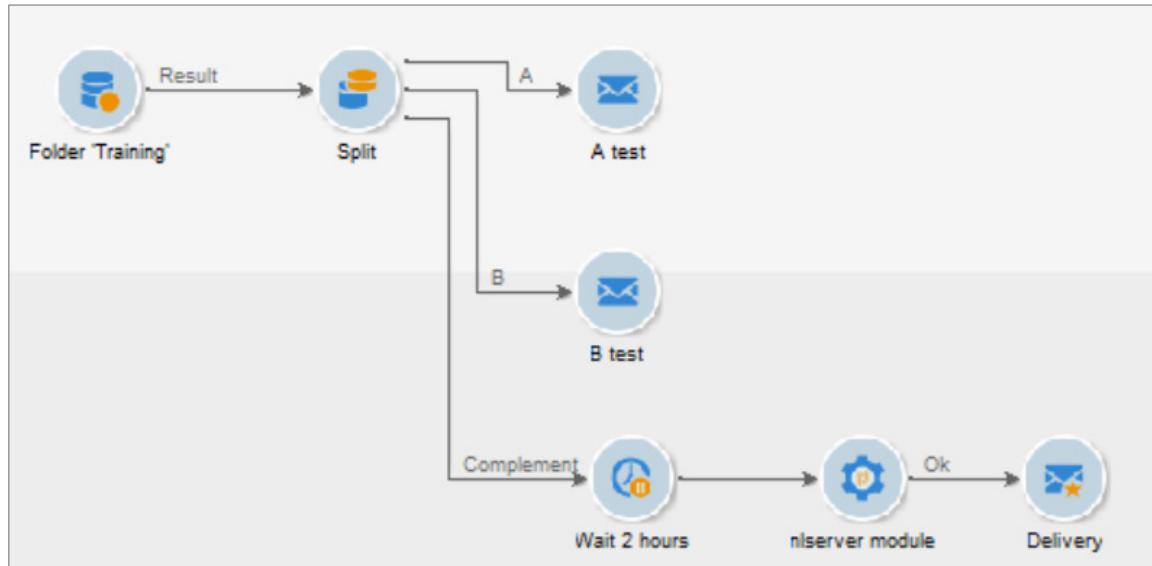
14. In the **Folder** section, select **Profiles and Targets > Recipients > Training**, as shown:



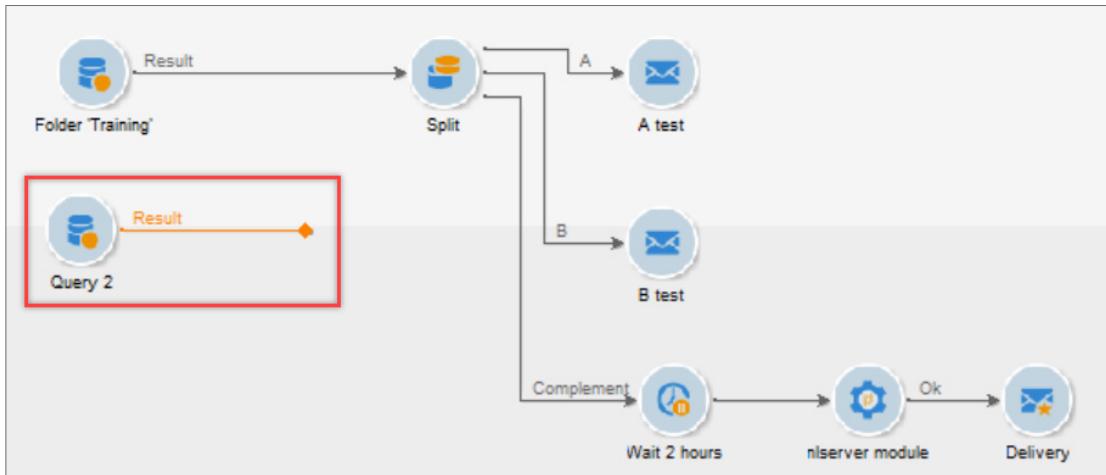
15. Click **Finish** to close the **Filter** page.

16. Click **Ok** to go back to the workflow.

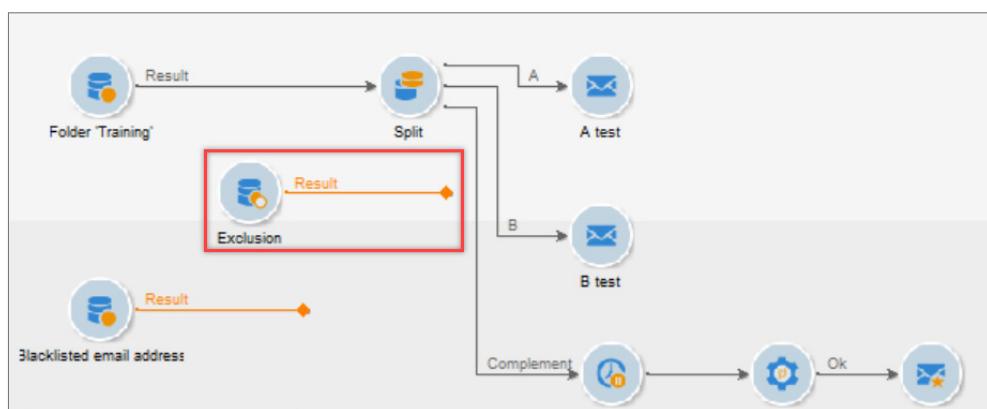
17. Click **Save** to save the workflow, as shown:



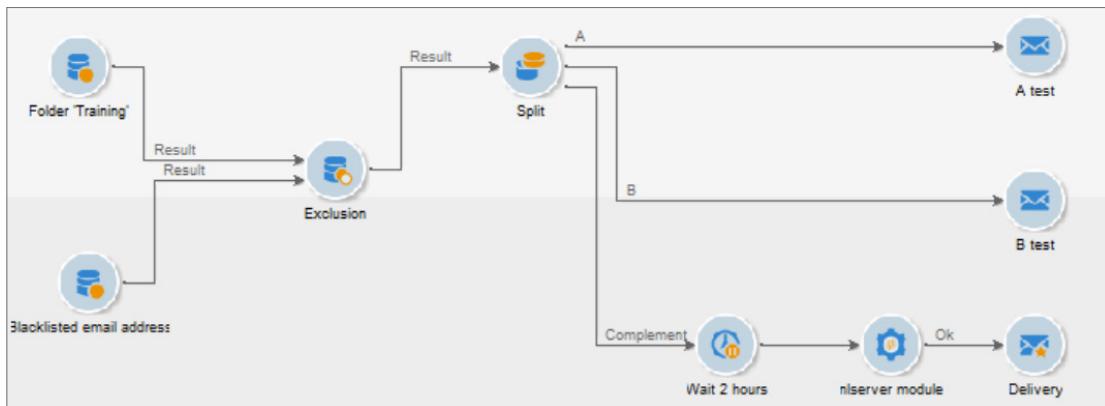
18. Drag a **Query** activity onto the workflow and place it below the **Folder Training** Query activity, as shown:



19. Double-click the **Query 2** activity. The **Query** dialog box opens.
20. Click the **Edit query** link. The **Targeting and filtering dimensions** page opens.
21. Expand **User filters**, select **Blacklisted email address**, and then click **Next**. The **Filter** page opens.
22. Click **Finish** to close the **Filter** page.
23. Click **Ok** to close the **Query** dialog box.
24. Click **Save** to save the workflow.
25. Drag an **Exclusion** activity and place it after the **Query** activities, as shown:



26. Join the transition lines from the **Query** activities to the **Exclusion** activity and then join the transition line from the **Exclusion** activity to the **Split** activity, as shown:



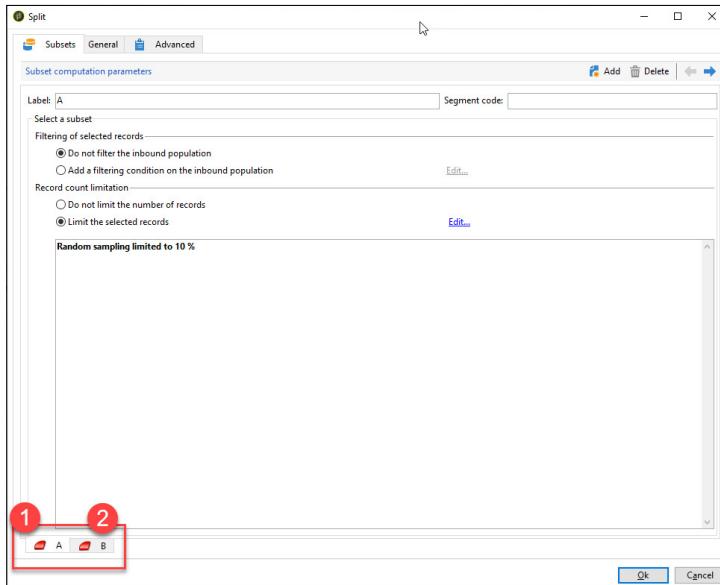
27. Double-click the **Exclusion** activity. The **Exclusion** dialog box opens.

28. Click the **Primary set** drop-down arrow and select **Folder 'Training'**.

29. Click **Ok** to close the **Exclusion** dialog box and get back to the workflow.

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

31. Double-click the **Split** activity and verify that the activity has two subsets, such as **A(#1)** and **B(#2)**, as shown:

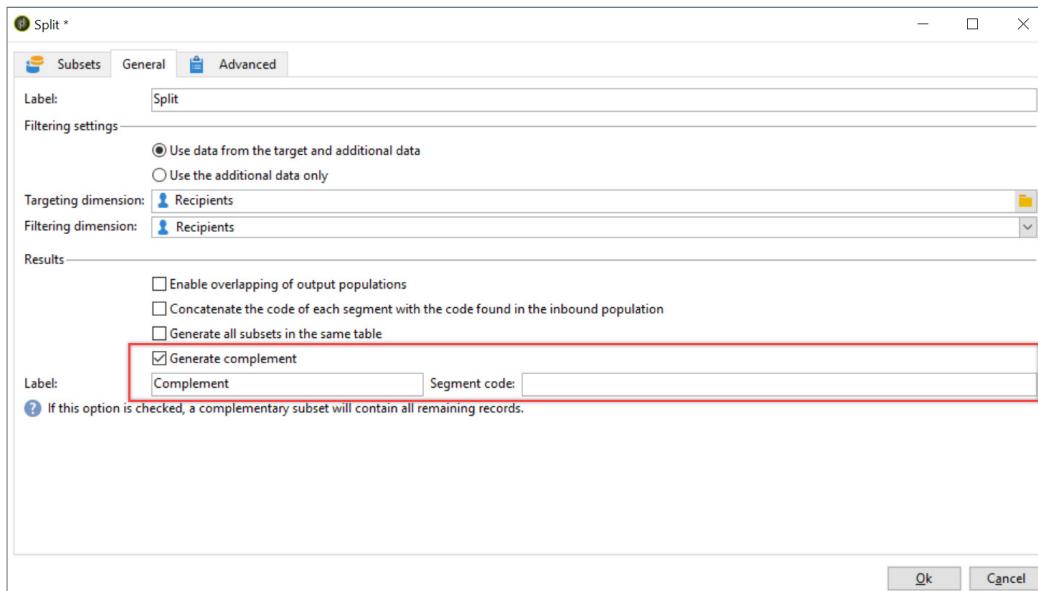


32. In the **Record count limitation** area, click the **Edit** link. The **Record count limitation** dialog box opens. If not already selected, select the **Activate random sampling** option.

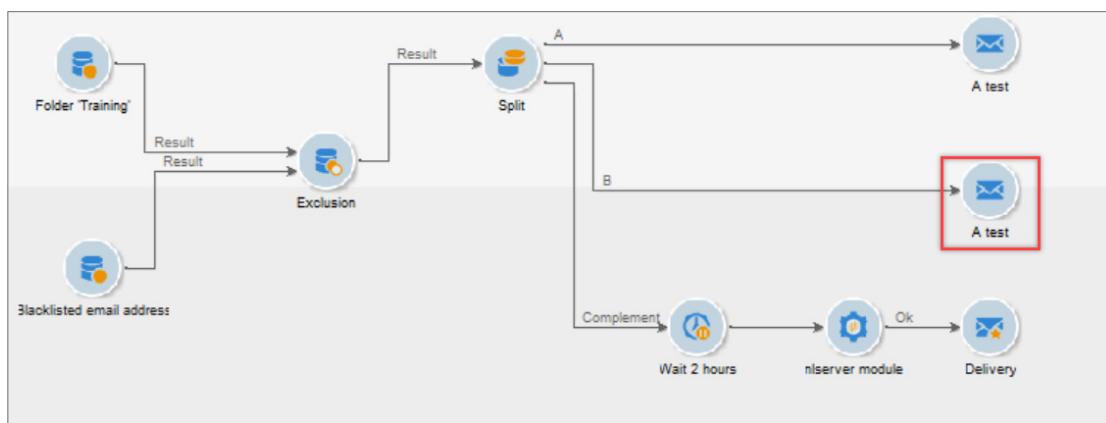
33. Click **Next**. The **Size** option is preselected and the value is set to **10%**.

34. Click **Finish** to go back to the **Split** dialog box.

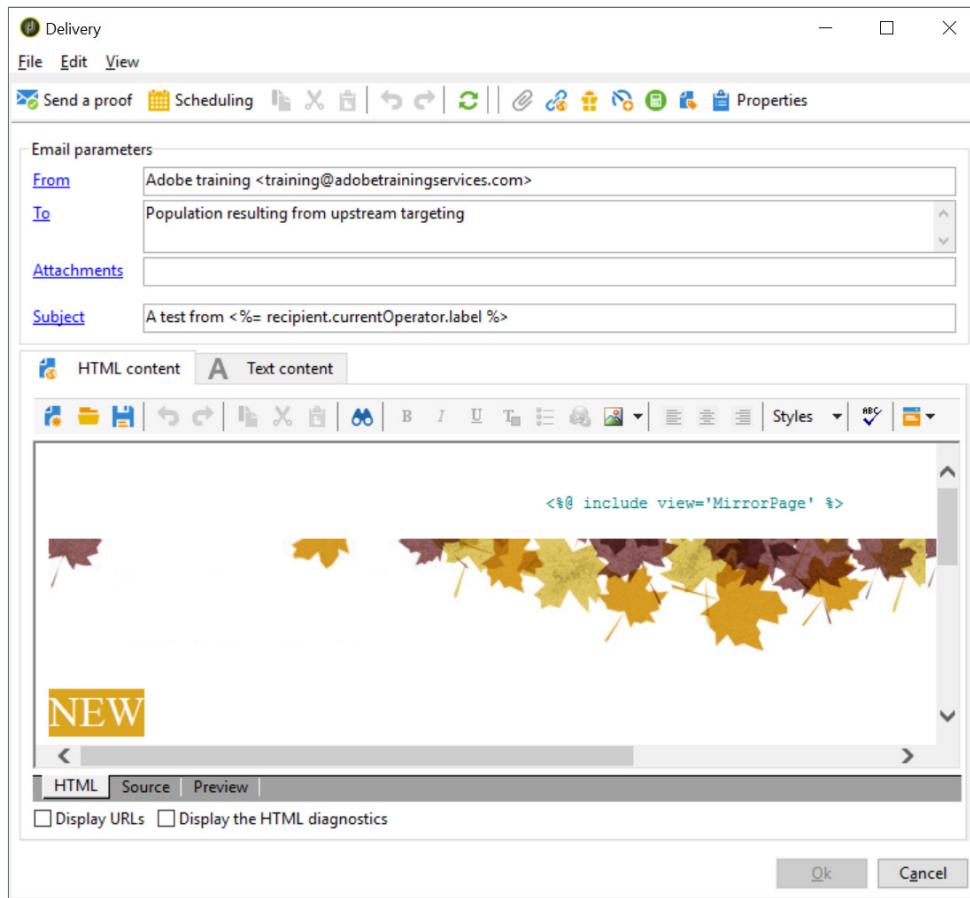
35. Click the **B** tab at the bottom of the dialog box. Follow steps 32-34 to verify the configurations.
36. Click the **General** tab. In the **Results** section, ensure that the **Generate complement** option is selected to target the remaining recipients (those who were not part of test groups A nor B), as shown:



37. Click **Ok** to close the **Split** dialog box and go back to the workflow.
38. Click **Save** to save the workflow.
39. Verify the transitions for both **A** and **B** are connected to their corresponding email delivery, which are **A test** and **B test**, respectively.
40. Right-click **A test** email delivery and select **Copy**. The delivery is copied.
41. Right-click anywhere on the workspace and then select **Paste** to paste a copy of the delivery on the workspace.
42. Delete the **B test** email delivery and join the copied **A test** email delivery to the transition line that was connected to the **B test** email delivery, as shown:



43. Double-click the copied **A test** email delivery. The Delivery dialog box opens, as shown:



44. Click the **Properties** tab. The **Delivery properties** dialog box opens.

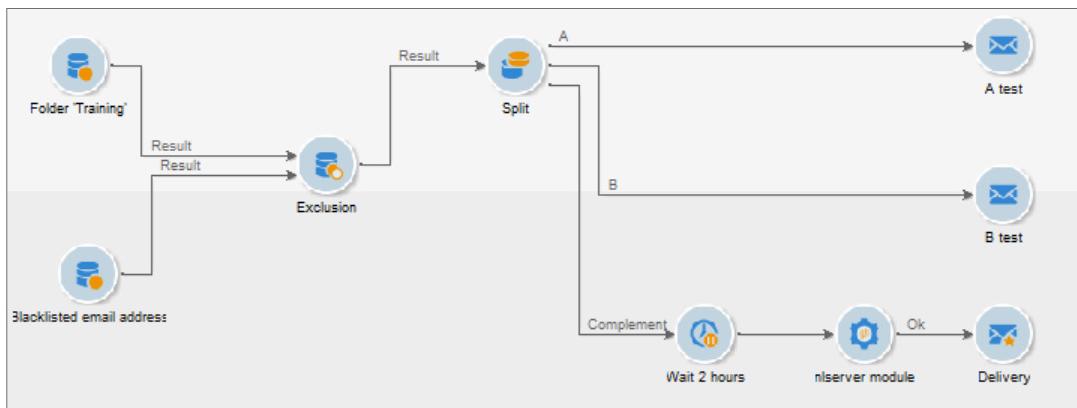
45. In the **Label** field, type **B test**.

46. Click **Ok** to close the **Delivery properties (read only)** dialog box and go back to the **Delivery** dialog box.

47. In the **Subject** field, delete **A** and replace it with **B**.

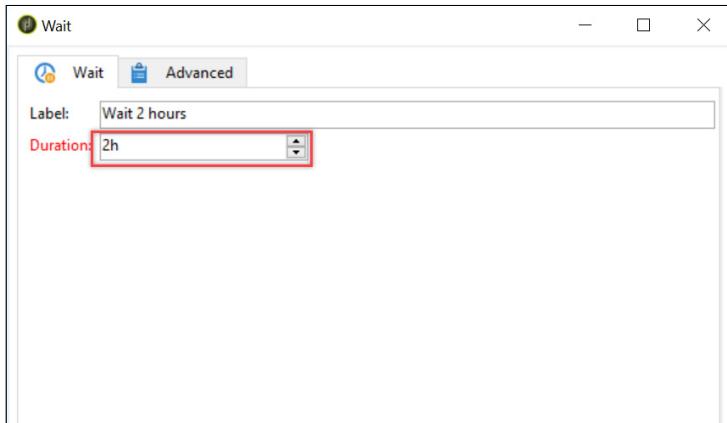
48. Click **Ok** to close the **Delivery** dialog box.

49. Click **Save** to save the workflow, as shown:



50. Double-click the **Wait 2 hours** activity. The **Wait** dialog box opens.

51. Verify if the duration is set to **2h**, as shown:

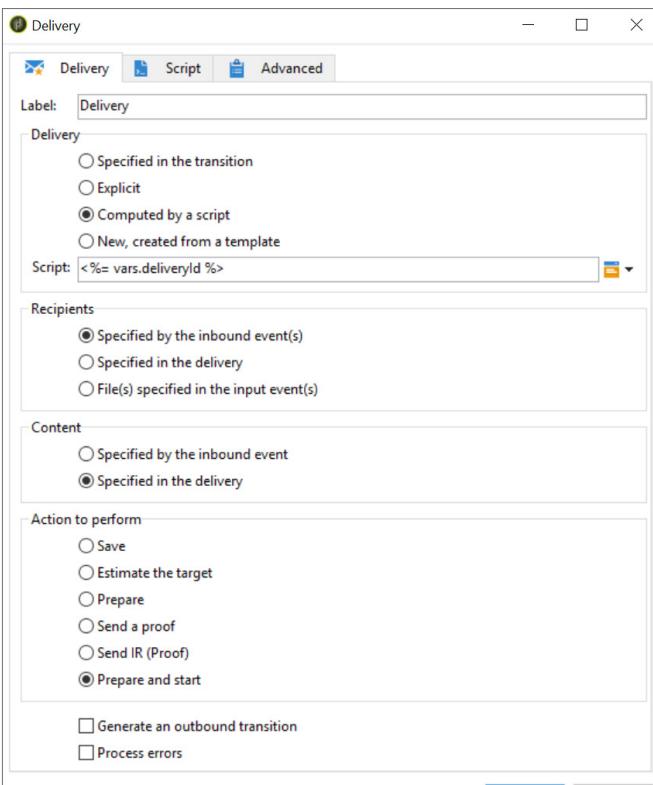


The Wait activity is configured so that the remainders are not immediately targeted. This provides time for the workflow to test the A and B population, respectively, by waiting until the receivers open the deliveries. As a result, the tracking logs are updated.

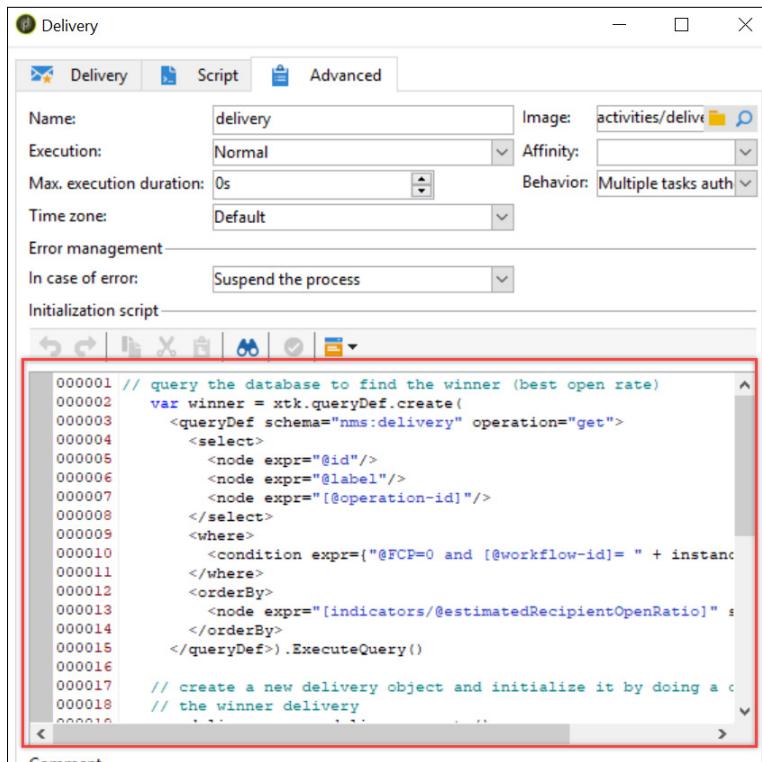
52. Click **OK** to close the **Wait** dialog box.

You will insert a script in the delivery that will select the model with the best opening rate and then send it to the remainders. This activity is different from the standard email delivery. It is available on the **Advanced** tab and helps you to configure a technical delivery (for example, use a template or, like in this exercise, use a script).

53. Double-click the **Delivery** activity. The **Delivery** dialog box opens, as shown:



54. Click the **Advanced** tab and verify whether the script is available, as shown:



#### 55. Review the script information:

- a. The first part of the script is a query. The **queryDef** command helps you recover from the NmsDelivery table, recover the deliveries created by executing the targeting workflow, sort them based on their estimated rate of opens, and then recover the information from the delivery with the highest rate of opens (**@estimatedRecipientOpenRatio**).

```
// query the database to find the winner (best open rate)
var winner = xtk.queryDef.create(
<queryDef schema="nms:delivery" operation="get">
<select>
<node expr="@id"/>
<node expr="@label"/>
<node expr="[@operation-id]"/>
</select>
<where>
<condition expr="@FCP=0 and [@workflow-id]= " + instance.id}/>
</where>
<orderBy>
<node expr="[indicators/@estimatedRecipientOpenRatio]" sortDesc="t
</orderBy>
</queryDef>).ExecuteQuery()
```

The query in the code helps you select the content of a delivery based on the highest rate of opens of emails. You can adapt it to base yourself on other delivery-specific indicators:

- > Best click throughput: [indicators/@recipientClickRatio]

- > Highest reactivity rate (email open and clicks in the message): [indicators/@reactivity]
- > Lowest complaint rate: [indicators/@refusedRatio]
- > Highest conversion rate: [indicators/@transactionRatio]
- > Number of pages visited following the reception of a message: [indicators/@totalWebPage]
- > Lowest unsubscription rate: [indicators/@optOutRatio]
- > Transaction amount: [indicators/@amount]

b. In the query, to sort based on the best click throughput change line number 000013 to:

```

<node expr="[indicators/@recipientClickRatio]" sortDesc="true"/>

00004   <select>
00005     <node expr="@id"/>
00006     <node expr="@label"/>
00007     <node expr="@operation-id"/>
00008   </select>
00009   <where>
00010     <condition expr="[@FCP=0 and [@workflow-id] = " + instance.id)"/>
00011   </where>
00012   <orderBy>
00013     <node expr="[indicators/@recipientClickRatio]" sortDesc="true"/>
00014   </orderBy>
00015   </queryDef>).ExecuteQuery()
00016 
00017 // create a new delivery object and initialize it by doing a copy of
00018 // the winner delivery
00019 var delivery = nms.delivery.create()

```

c. The delivery with the best click throughput is duplicated. Verify line numbers 000019 and 000020:

```

var delivery = nms.delivery.create()
delivery.Duplicate("nms:delivery|" + winner.@id)

```

d. The label of the duplicated delivery is modified, and the word *final* is added to it. Verify line number 000025:

```
delivery.label = winner.@label + " Final"
```

e. The delivery is copied into the campaign dashboard. Verify line number 000030:

```
delivery.operation_id = winner.@[ "operation-id"]
```

f. The delivery options are set for the delivery to be sent automatically. Verify line numbers 000034 and 000035:

```

delivery.scheduling.validationMode = "manual"
delivery.scheduling.delayed = 0

```

g. The delivery is saved in the database. Verify line number 000038:

```
delivery.save()
```

h. The unique identifier of the duplicated delivery is stored in the workflow variable. Verify line number 000041:

```
vars.deliveryId = delivery.id
```

56. Click **Ok** to close the **Delivery** dialog box and return to the workflow. If necessary, click **Save** to save the workflow.

57. Click the **Start** icon to start the workflow to target the **Training** folder. You will notice that both of the email deliveries (A and B) and the **Wait 2 hours** activity start blinking. The email deliveries are waiting for approval and confirmation, and the **Wait 2 hours** activity is waiting for the scheduled time to execute the workflow.

58. Click the **Dashboard** tab to view the deliveries, as shown:

The screenshot shows the Dynamics 365 Marketing interface. The top navigation bar includes Home, Explorer, Campaign 'AB test\_JS (OP11)', Dashboard, Edit, Targeting and workflows, General, Schedule, and Reports. The main area displays the campaign 'AB test\_JS (OP11)' which was started on 03/07/2020. It shows the following details:

- Status: In progress (started on 03/07/2020)
- Type: Unique
- Schedule: From 03/07/2020 to 03/12/2020
- Program: Campaign Management > Campaigns
- Assigned to: Administrator (admin)

Under 'Action(s) on the campaign', there are links to 'Add a delivery' and 'Add a document'. The 'Deliveries' section contains two entries:

Delivery	Status
B test (DM50)	Pending confirmation
A test (DM49)	Pending confirmation

59. Select the **A test** delivery and click **Open**. The Delivery dialog box opens.

60. Click the **Delivery** tab to view the targeted recipients, as shown:

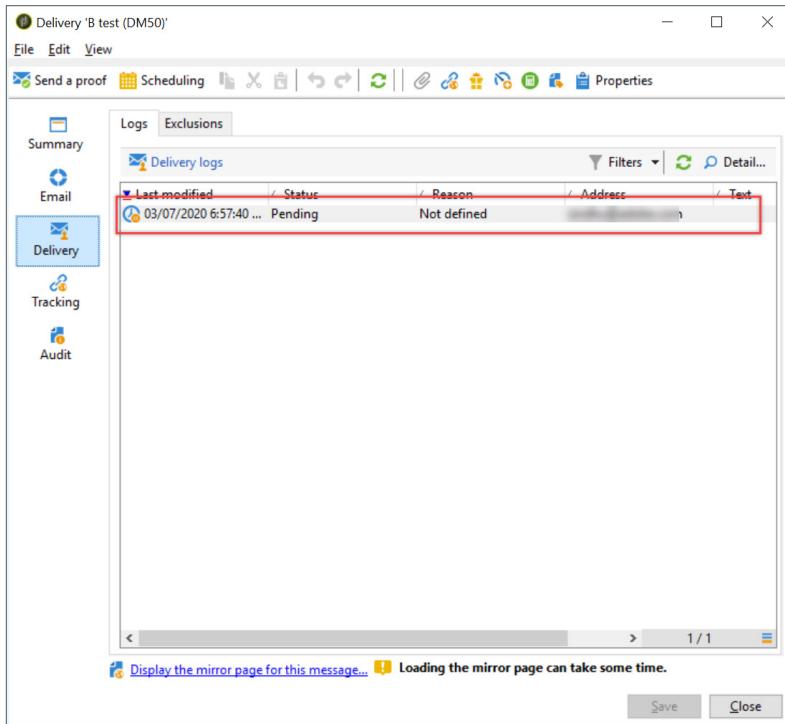
The screenshot shows the 'Delivery' dialog box for delivery 'A test (DM49)'. The left sidebar has tabs for Summary, Email, Delivery (which is selected), Tracking, and Audit. The main area has tabs for Logs and Exclusions. The Logs table shows the following data:

Last modified	Status	Reason	Address	Text
03/07/2020 6:57:36 ...	Pending	Not defined	[redacted]	

61. Click **Close** to go back to the **Dashboard** tab.

62. Select the **B test** delivery and click **Open**. The Delivery dialog box opens.

63. Click the **Delivery** tab to view the targeted recipients, as shown:



The screenshot shows the 'Delivery' dialog box for a campaign named 'B test (DM50)'. The left sidebar has tabs for Summary, Email, Delivery (which is selected), Tracking, and Audit. The main area has tabs for Logs and Exclusions, with Logs selected. A table titled 'Delivery logs' shows one entry: 'Last modified' (03/07/2020 6:57:40 ...), 'Status' (Pending), 'Reason' (Not defined), 'Address' (redacted), and 'Text' (redacted). A red box highlights this row. Below the table, a message says 'Display the mirror page for this message... Loading the mirror page can take some time.' At the bottom are 'Save' and 'Close' buttons.

Last modified	Status	Reason	Address	Text
03/07/2020 6:57:40 ...	Pending	Not defined	[Redacted]	[Redacted]

64. Click **Close** to go back to the **Dashboard** tab.

65. Click the **A test** delivery and then click **Confirm delivery** button.

66. When the **Start delivery** dialog box appears, click **OK**. The delivery starts. The targeted population will receive emails.

67. Click the **B test** delivery and then click the **Confirm delivery** button.

68. When the **Start delivery** dialog box appears, click **OK**. The delivery starts. The targeted population will receive emails.

69. Ensure some delegates open one version more than the other. You now need to update the tracking information to see who opened the mail.

70. In the Explorer view, navigate to **Administration > Production > Technical workflows**. Select the **Tracking** workflow. The workflow is displayed in the details view, as shown:

The screenshot shows the SAP Fiori interface with the following details:

- Left Sidebar:** Shows the navigation tree under 'DEV' with sections like Administration, Configuration, Platform, Production, and Campaign Management.
- Central Area:**
  - Table View:** Shows a list of technical workflows with columns: Label, Internal name, Status, Failed, and Last processing. The 'Tracking' workflow is selected and highlighted.
  - Workflow Details:** Shows the 'Tracking (tracking)' workflow diagram. It consists of three activities: Scheduler, Tracking, and End, connected by arrows labeled 'OK'. The 'Scheduler' activity is highlighted with a red box.

71. Right-click the **Scheduler** activity and select **Execute pending task(s) now**, as shown. The **Scheduler** executes the pending task.

The screenshot shows the SAP Fiori interface with the following details:

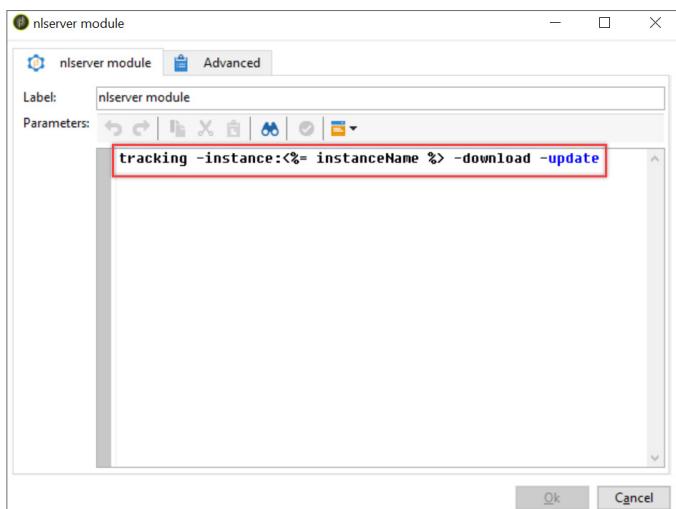
- Left Sidebar:** Shows the navigation tree under 'DEV' with sections like Administration, Configuration, Platform, Production, and Campaign Management.
- Central Area:**
  - Table View:** Shows a list of technical workflows with columns: Label, Internal name, Status, Failed, and Last processing. The 'Tracking' workflow is selected and highlighted.
  - Workflow Details:** Shows the 'Tracking (tracking)' workflow diagram. The 'Scheduler' activity is highlighted with a red box.
  - Context Menu:** A context menu is open over the 'Scheduler' activity, listing options: Open..., Display logs, Execute pending task(s) now (which is highlighted with a red box), Restart workflow from this task, Cut, Copy, Paste, Delete, Copy as bitmap, Normal execution, Enable but do not execute, Do not enable, Save, and Cancel.

72. Go back to the **Campaign 'AB test\_<your initials>** tab and click the **Targeting and workflows** tab.

The **nlserver module** activity updates the tracking logs.

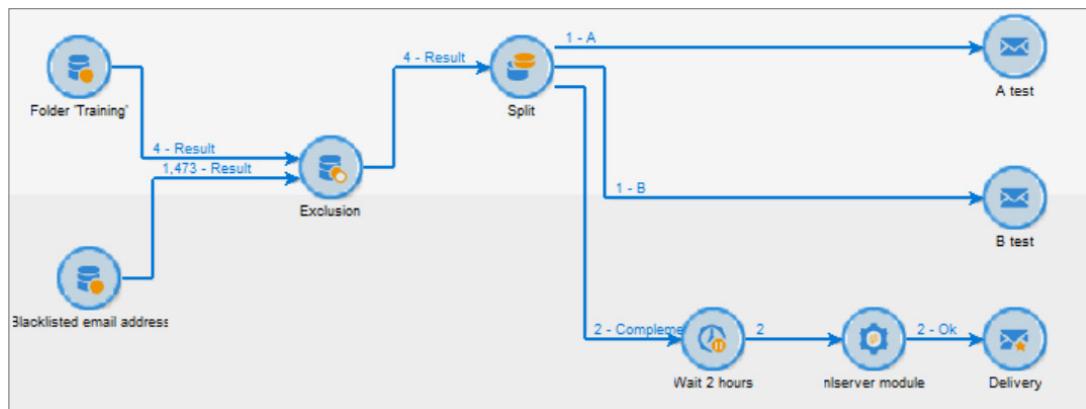
73. Double-click the **nlserver module** activity. The **nlserver module** dialog box opens.

74. Ensure that the **tracking -instance:<%= instanceName %> -download -update** information is displayed in the **nlservice module** tab, as shown:



75. Click **Ok** to close the **nlservice module** dialog box. If **Ok** is unavailable, click **Cancel**.

76. To immediately execute the **Wait 2 hours** activity, right-click the **Wait 2 hours** activity and then select **Execute pending task(s) now**. The **Wait 2 hours** activity executes the pending tasks and the workflow is updated, as shown:



77. Click the **Dashboard** tab. The deliveries are displayed.

78. Verify that the remaining population is targeted by checking if the label of the delivery contains the name of the delivery with the word **Final** added to it, as shown:

The screenshot shows the 'Campaign 'AB test\_JS (OP11)'' dashboard. At the top, there are tabs for 'Dashboard', 'Edit', and 'Targeting and workflows'. Below the tabs, the campaign name 'AB test\_JS (OP11)' is displayed with a blue and orange icon. A message states 'The campaign was started on 03/07/2020'. On the right, there are buttons for 'General', 'Schedule', and 'Reports', with 'General' being the active tab. A large red box highlights the 'Deliveries' section. Under 'Deliveries', there is a table with three rows:

✓	A test Final (DM51)	Finished
✓	B test (DM50)	Finished
✓	A test (DM49)	Finished

Based on the A/B testing, the A test delivery was opened the most by the recipients. In conclusion, the A test delivery was used to target the population that were not used as a test group.

## Module 6

# Adobe Campaign Classic–Adobe Experience Manager Integration

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### Introduction

In the customer-centric world, it is important to drive marketing efforts with proper customer insights. Providing seamless customer experience is the key to successful marketing.

The Adobe Campaign Classic and Adobe Experience Manager integration enables you to utilize the content authoring capabilities of Experience Manager and the delivery capabilities of Campaign Classic. You can manage the content of your email deliveries, such as newsletters, and insert assets from your Experience Manager Assets library while editing an email content in Campaign Classic.

### Objectives

After completing this module, you will be able to:

- Explain the benefits of the Campaign Classic–Experience Manager integration
- Design the email content by using the Experience Manager content editor

# Campaign Classic–Experience Manager Integration

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Adobe Marketing Cloud solutions enable you to optimize your digital marketing and advertising investments. There are five core solutions within the Adobe Marketing Cloud:

- Adobe Campaign
- Adobe Experience Manager
- Adobe Primetime
- Adobe Social
- Adobe Target

With the powerful integration workflows across the solutions, Adobe Marketing Cloud offers comprehensive digital marketing solutions. The Campaign Classic–Experience Manager integration helps connect content creation and campaign execution.

Campaign Classic–Experience Manager integration enables you to:

- Source and compose intelligent content quickly and efficiently
- Deliver personalization and engagement through a single accessible view of the customer
- Integrate the email and mobile channels into the customer journey
- Automate the delivery of meaningful and timely messages and offers
- Create consistent customer experiences across channels to foster brand loyalty and improve path to conversion
- Streamline content creation within campaign processes, eliminate technology silos and complex data flows, and accelerate time to market

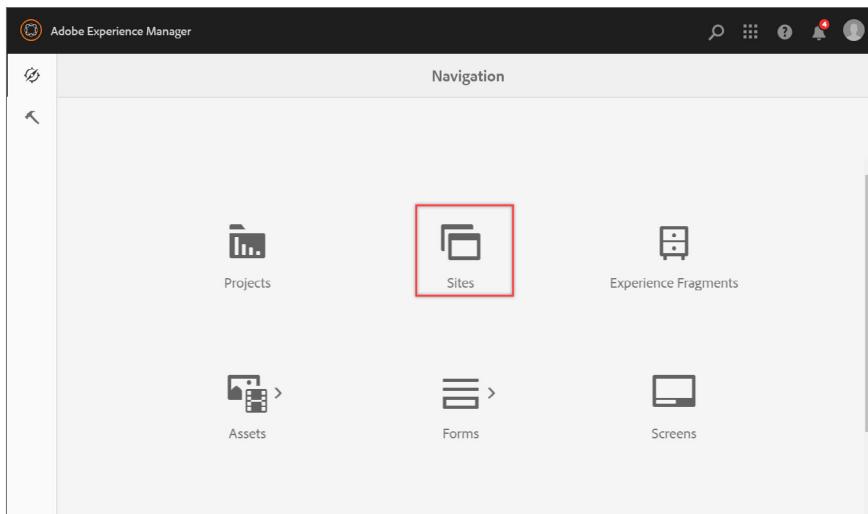
The integration works best when:

- You follow a structured approach for emails and care about security and governance.
- Your email design workflow is about maintaining email templates that will be used by multiple contributors. For example, it is useful when your colleagues are creating and accessing newsletter campaigns from different regions.
- You want to drive consistency from webpages to email.
- You want to ensure that a simple process is followed for personalization of the content.

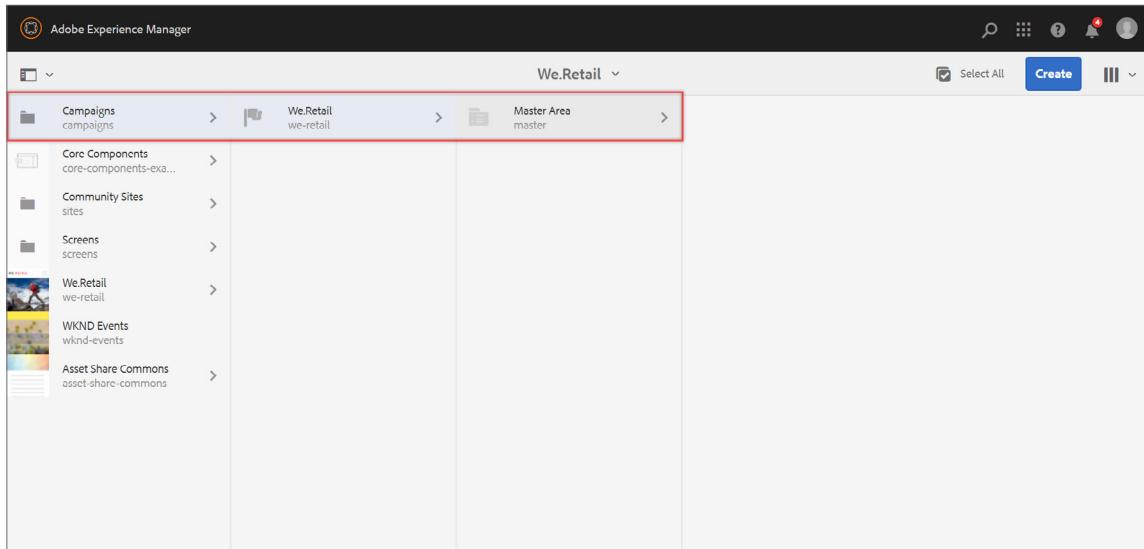
# Exercise 1: Design an email content by using the Experience Manager content editor

**Scenario:** Your marketing team sends daily newsletters to subscribers of the Newsletter service. The team has decided to update the content of the email that is sent to the subscribers. In this exercise, you will design the email content in Experience Manager and integrate the email content with the Campaign Classic instance.

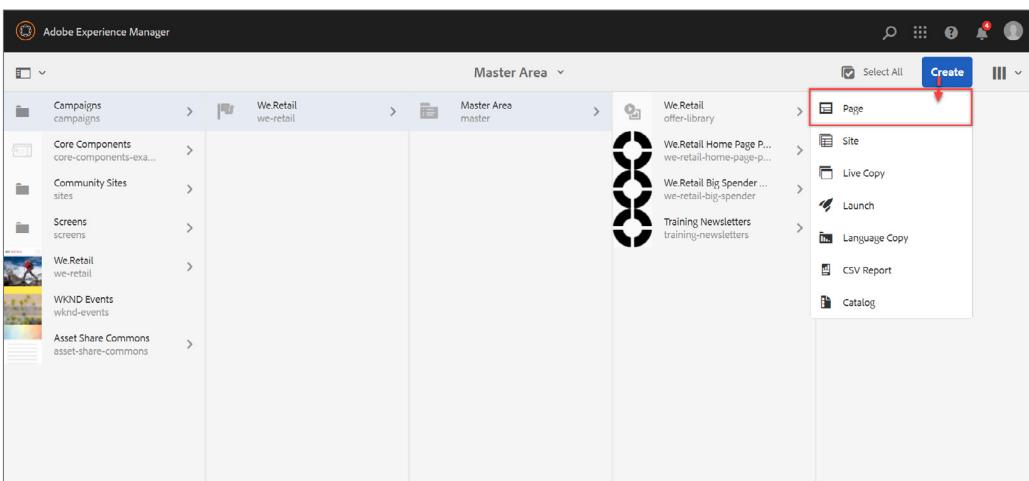
1. Click the **Experience Manager author** link that your instructor provided. For example, click <https://aemauthorXXX.adls.adobeblab.com/>  
The link opens on a separate tab in the browser.
2. Provide your credentials and log in to the Experience Manager author instance.
3. In the **Navigation** pane, click **Sites**, as shown. The **Sites** pane opens.



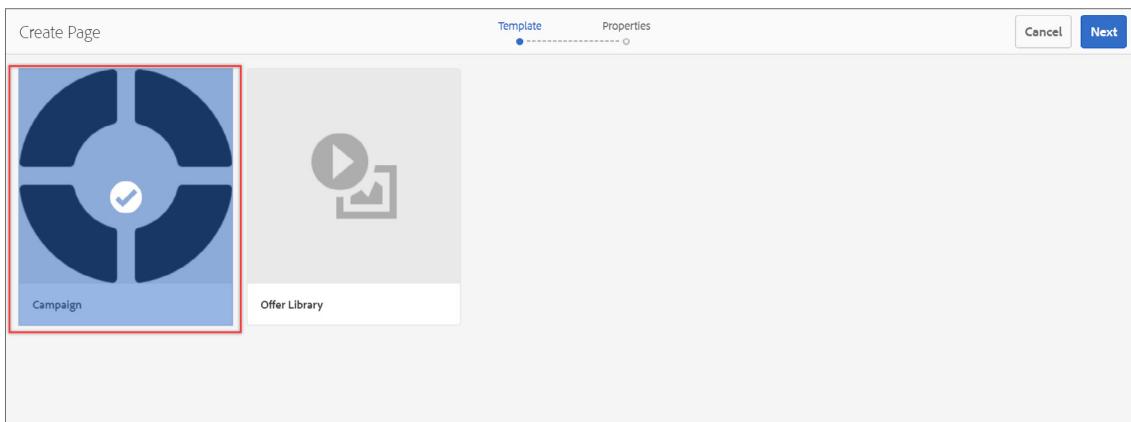
4. In the column view, select **Campaigns > We.Retail > Master Area**, as shown. The **Master Area** pane opens.



5. Click **Create > Page**, as shown. The **Create page** screen opens.



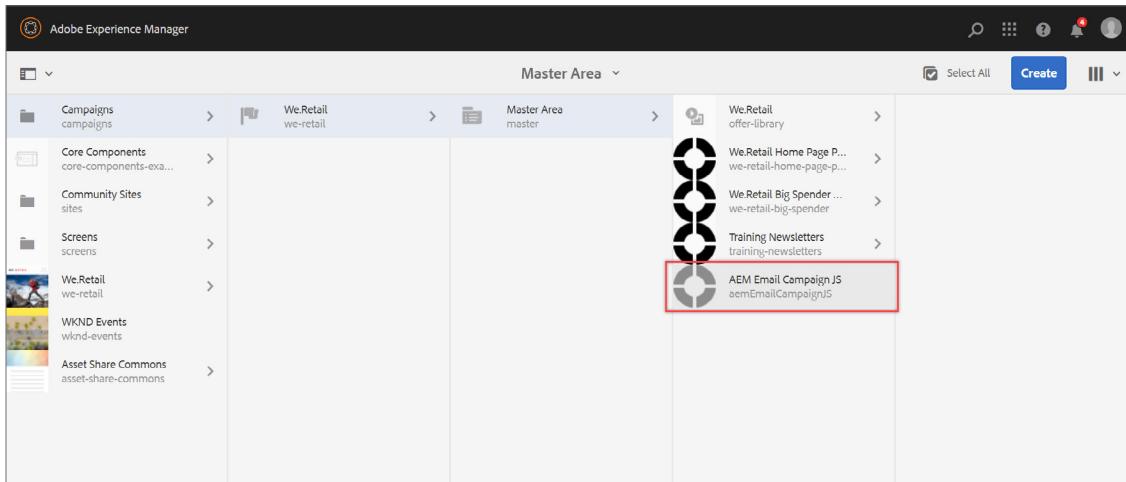
6. In the **Template** wizard, select the **Campaign** template, as shown:



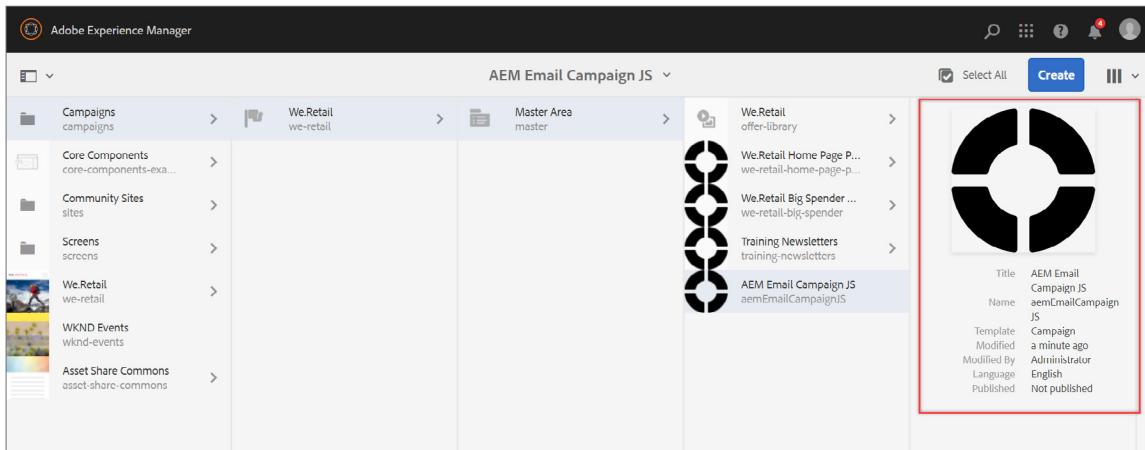
7. Click **Next**. The **Properties** wizard opens.
8. On the **Basic** tab, provide the following:
  - a. In the **Title** field, type **AEM Email Campaign <your initials>**. For example, type **AEM Email Campaign JS**.
  - b. In the **Name** field, type **aemEmailCampaign<your initials>**. For example, type **aemEmailCampaignJS**.

 **Note:** The **Name** field must only contain letters, numbers, dashes (-), commas, or underscores (\_).

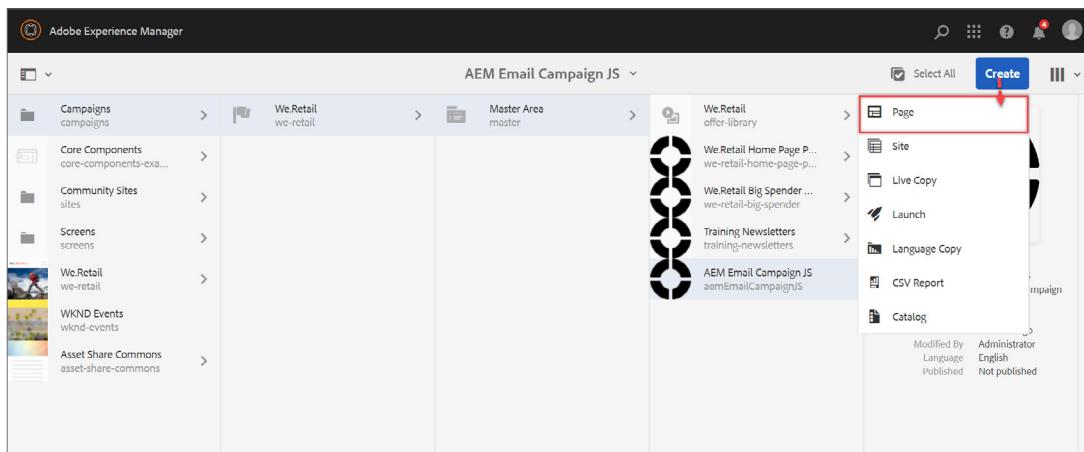
9. Click **Create**. The **Success** dialog box opens.
10. Click **Done** to go back to the **Master area** pane. Notice that the new page is created, as shown:



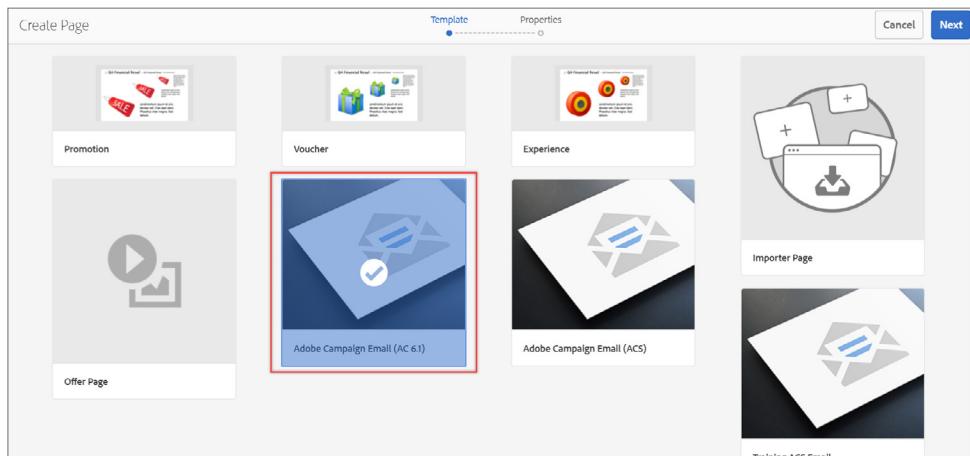
11. Select the **AEM Email Campaign <your initials>** page. The page details are displayed, as shown:



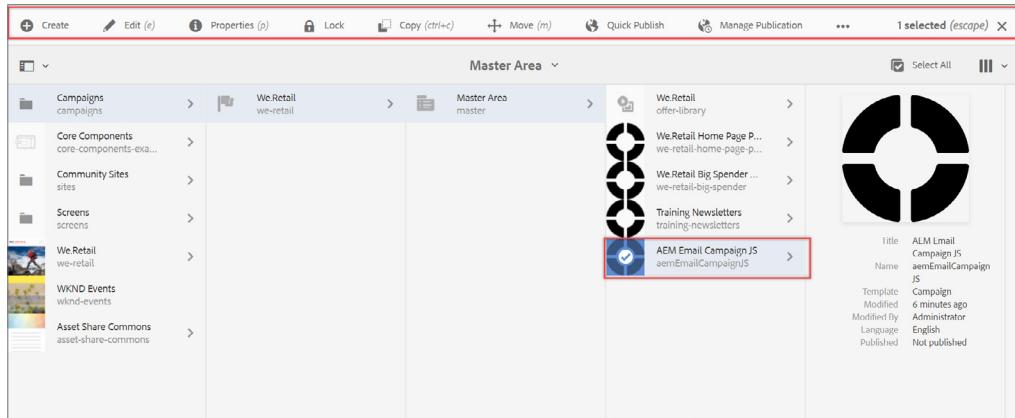
12. Click **Create > Page**, as shown. The **Create page** screen opens.



13. Select the **Adobe Campaign Email (AC 6.1)** template in the **Template** wizard, as shown, and then click **Next**. The **Properties** wizard opens.



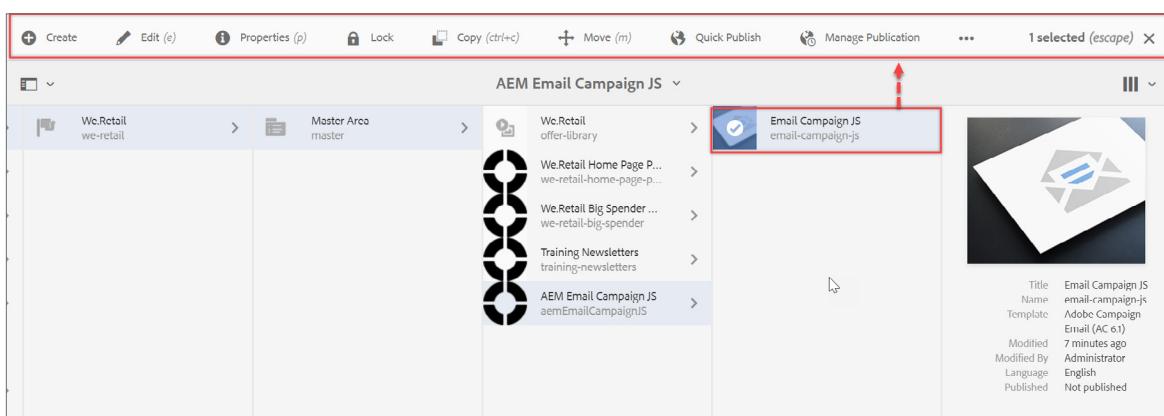
14. In the **Title** field, type **Email Campaign <your initials>**. For example, type **Email Campaign JS**.
15. Click **Create**. The **Success** dialog box opens.
16. Click **Done** to create the page.
17. Click the **email** icon in the **AEM Email Campaign <your initials>** pane. Ensure that a checkmark is displayed (on the **email** icon itself) to confirm the selection. The action bar opens, as shown:



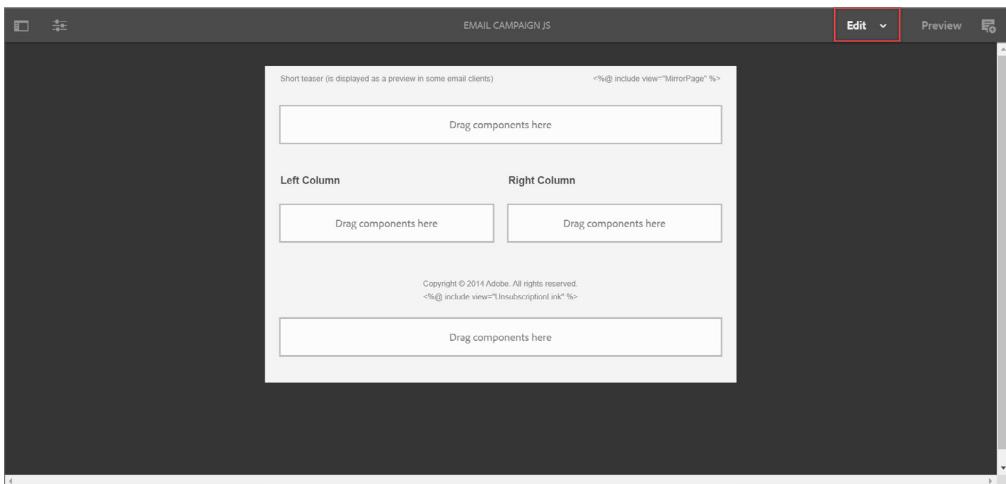
18. Click **Properties (p)**. The **AEM Email Campaign <your initials>** page opens.
19. Click the **Cloud services** tab. The **Cloud Service Configurations** page opens. Ensure that the **Inherited from content/ campaigns/we-retail** checkbox is selected.

**Note:** If the checkbox is not selected or not available, select the **Add configuration** drop-down arrow and select **Adobe Campaign**. A new **Adobe Campaign** field is added. The field is auto-populated with the value **acsconnection**. **acsconnection** refers to Adobe Campaign Server connection.

20. Click **Save & Close** to save the configuration and go back to the **Master area** page.
21. Select the **AEM Email Campaign <your initials>** pane. The **Email Campaign <your initials>** pane is displayed.
22. Click the **email** icon in the **Email Campaign <your initials>** pane to view the action bar, as shown:



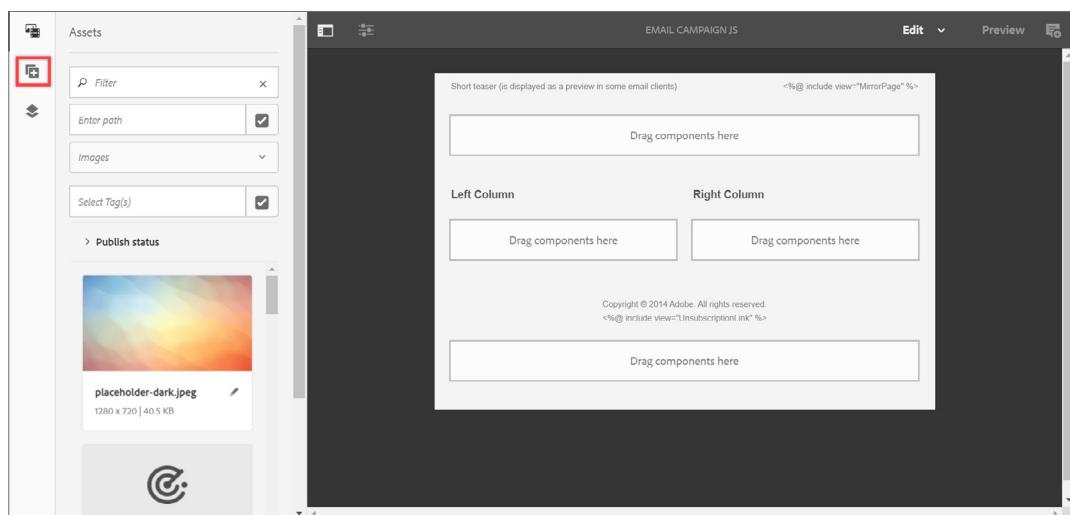
23. Select **Edit (e)** on the actions bar. Ensure the page is opened in the Edit mode by verifying the **Edit** drop-down menu is shown in the upper-right corner, as shown:



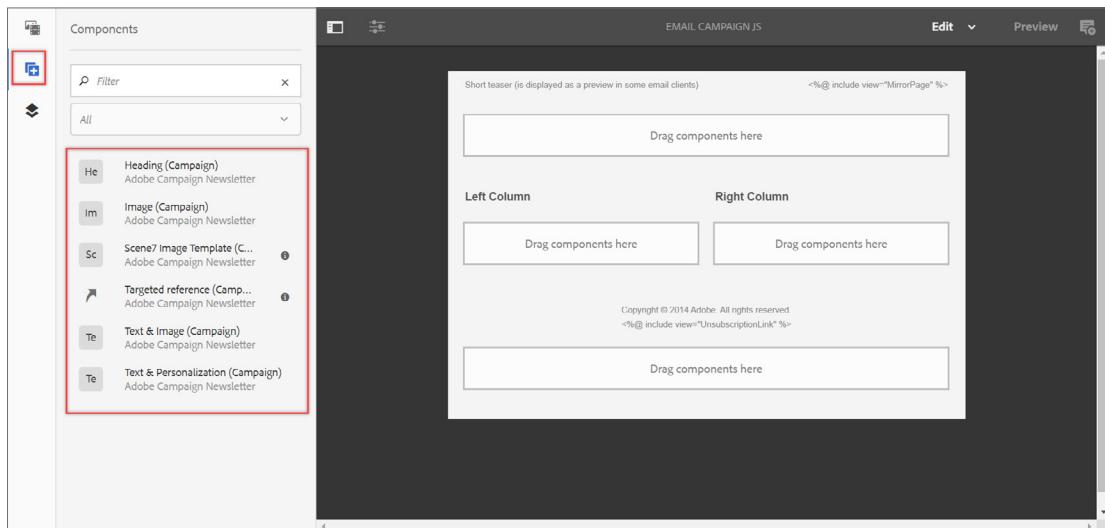
24. Click the **Toggle Side Panel** icon in the upper left. The side panel opens.



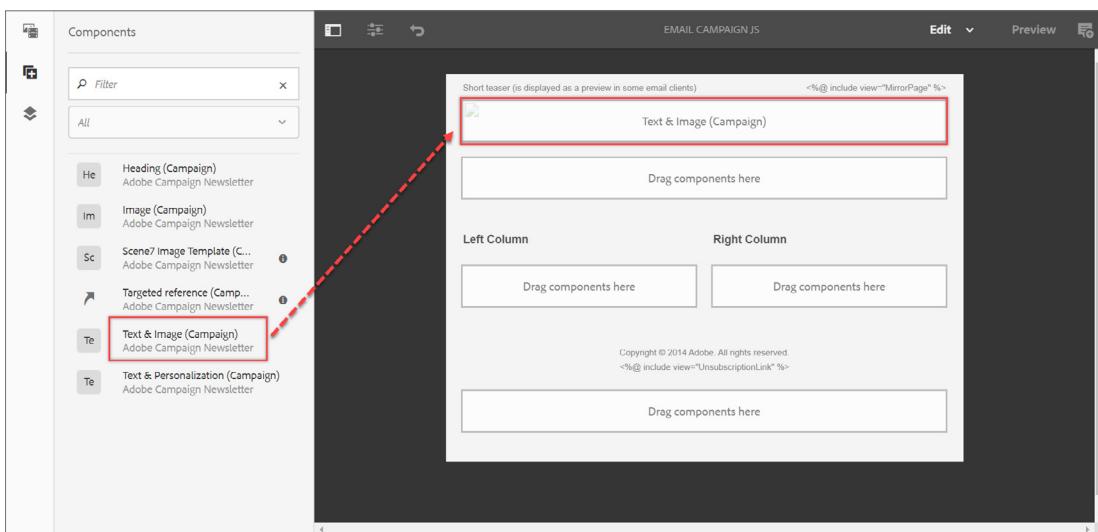
25. Click the **Components** icon in the side panel, as shown. The **Components** section is displayed.



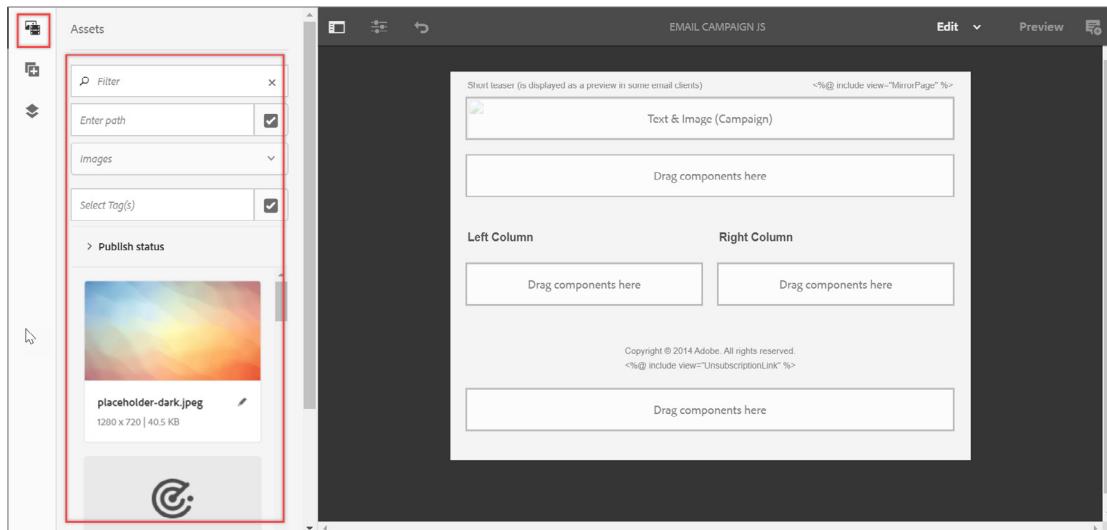
26. Click the **Components** tab to open the list of components, as shown, if it is not open already.



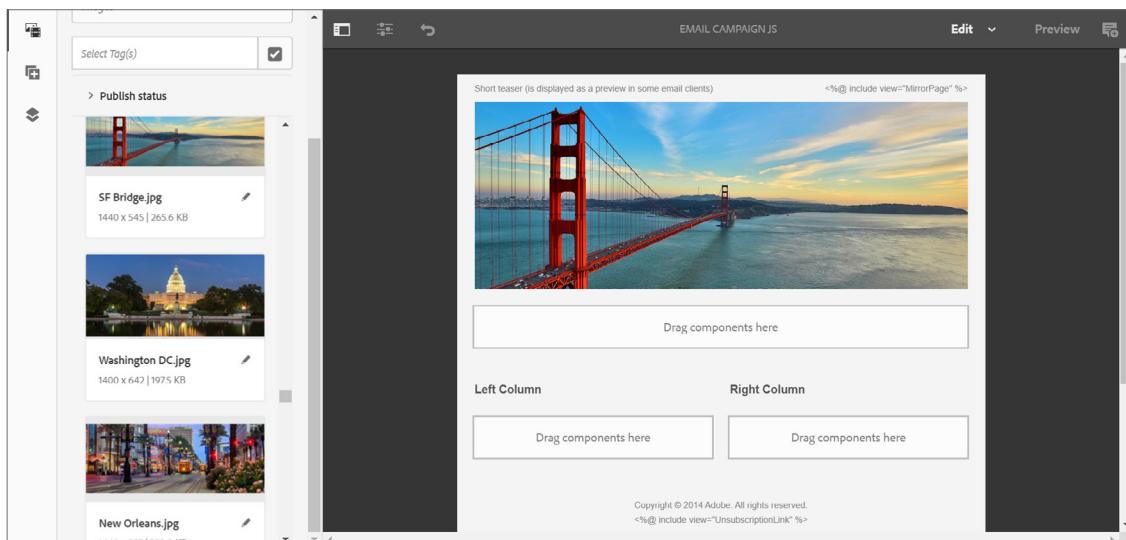
27. Drag **Text & Image (Campaign)** onto the **Drag components here** area at the top. The **Drag components here** area changes to the **Text & Image (Campaign)** area, as shown:



28. Click the **Assets** icon in the side panel. The **Assets** section is displayed, as shown:

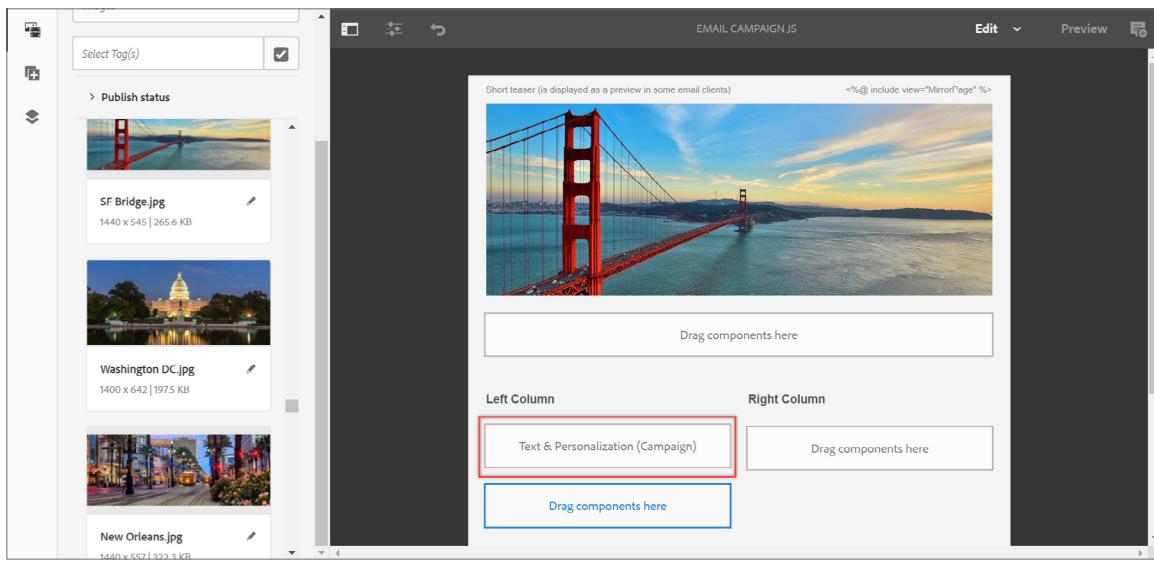


29. Drag an image from the section below the **Publish status** section to the **Text & Image (Campaign)** component area. The image is placed in the **Text & Image (Campaign)** component, as shown:



30. Click the **Drag components here** section below **Left Column** and click the **+** icon to insert a new component. The **Insert New Component** dialog box opens.

31. Select **Text & Personalization (Campaign)**. A new **Text & Personalization (Campaign)** box is added under **Left Column**, as shown:

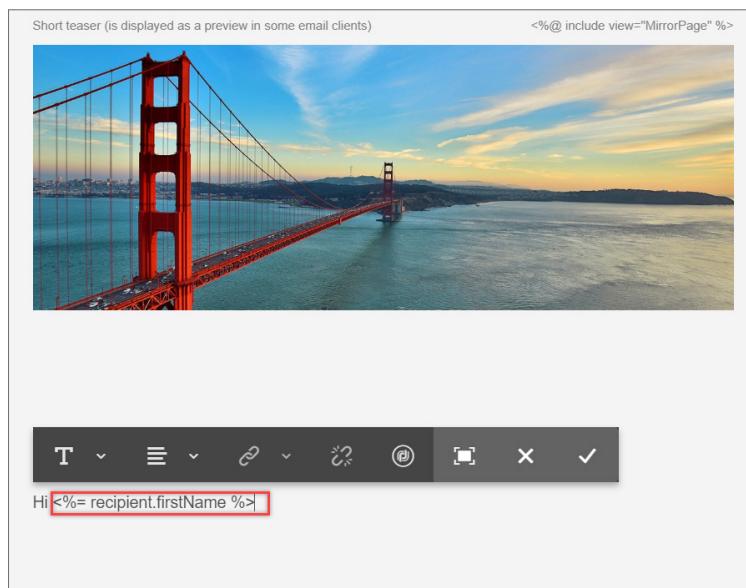


32. Click the **Text & Personalization (Campaign)** box and click the **Edit** icon. A new toolbar is displayed that will enable you to add text content to the template.

33. Type **Hi** and then press the spacebar.

34. Click the **Campaign** (⊕) icon. The **Select Adobe Campaign Variable** dialog box opens.

35. Select **Recipient > First name**, and then click **Confirm** (checkmark in the upper right). The code is added to the template, as shown:

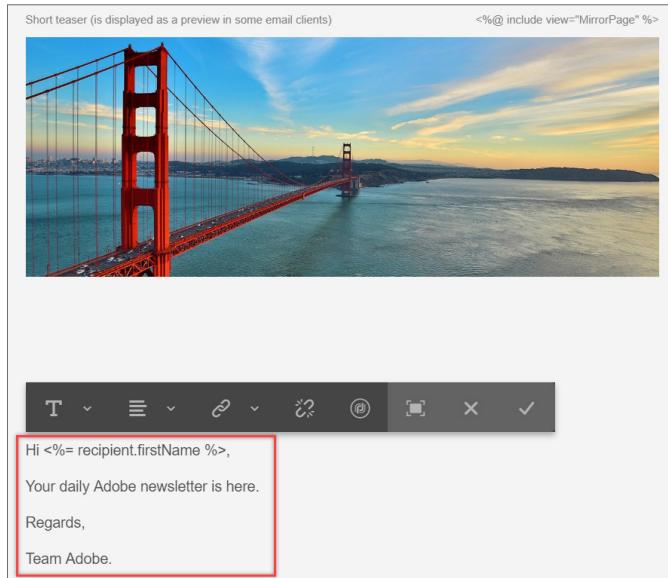


36. Place the cursor at the end of the code and insert a comma.

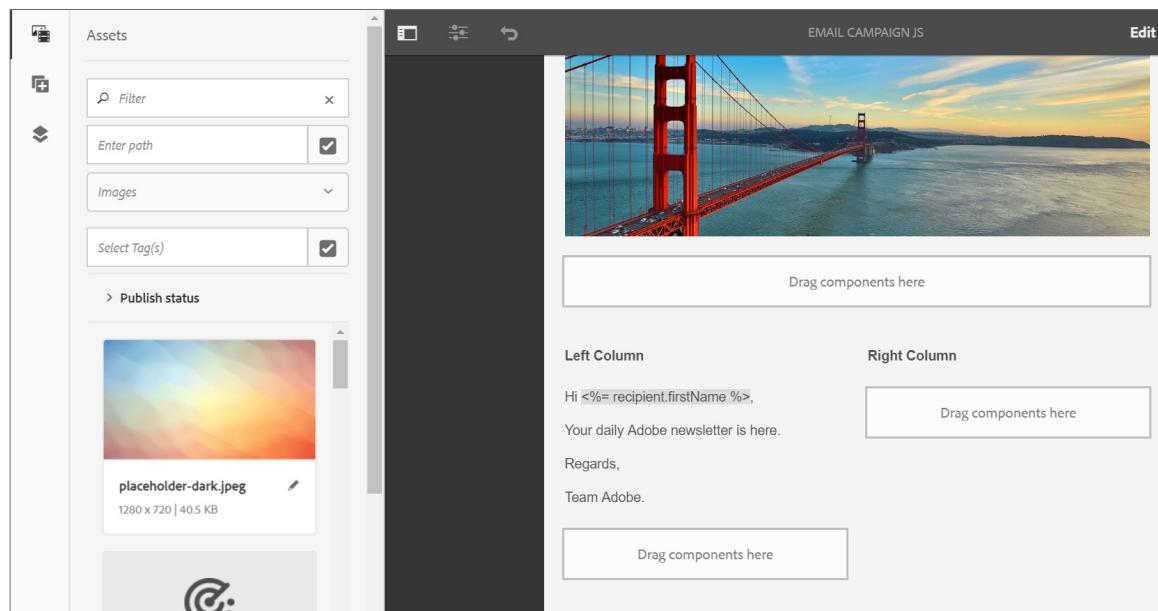
37. Place the cursor after the comma and press the **Enter** key.

38. Type Your daily Adobe newsletter is here.

39. Press the **Enter** key and then type **Regards, Team Adobe**, as shown:

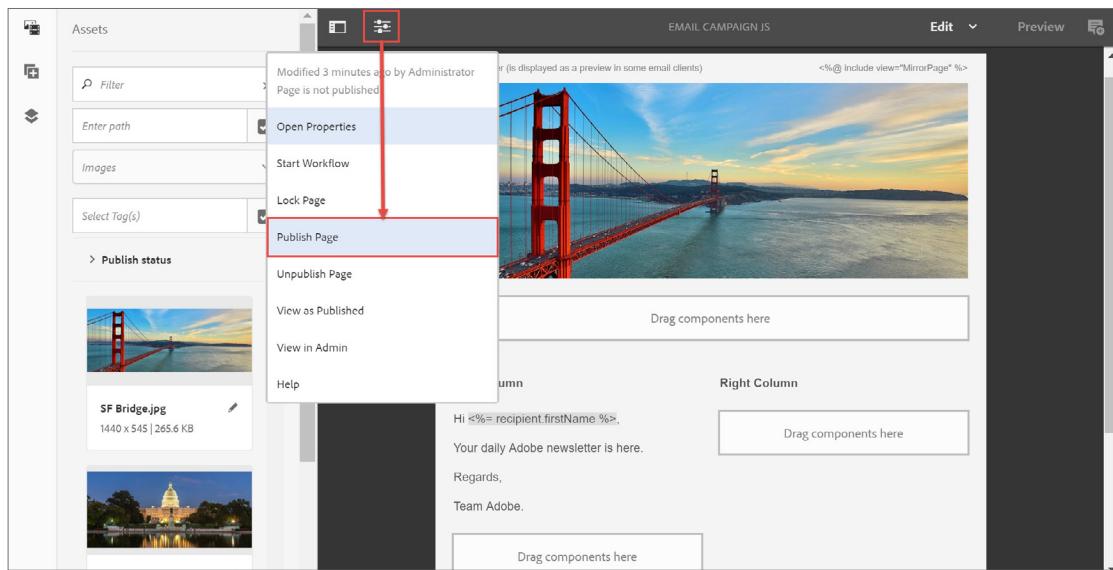


40. Click the **Save** (checkmark in the upper right) icon to save the email content, as shown:



**Note:** The Experience Manager content displayed in this exercise is created for demonstration purposes only. You can delete the unwanted components, such as **Left Column** and **Right Column** based on your requirements.

41. Click the **Page Information** icon and then click **Publish Page** from the drop-down list, as shown.



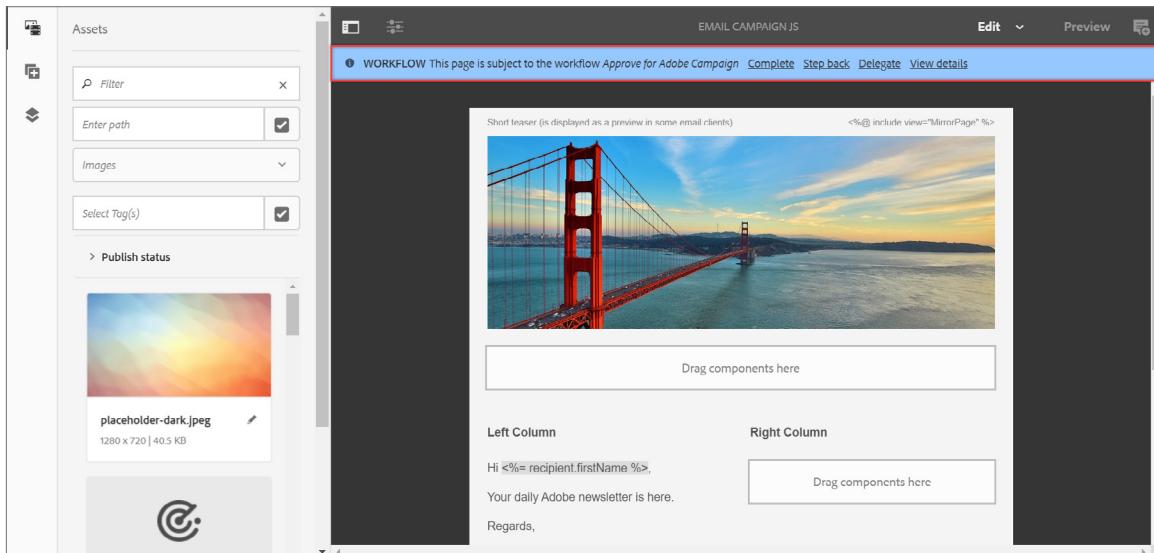
42. Click **Publish**. The page is published.

43. Click the **Page Information** icon and then click **Start Workflow**. The **Start Workflow** dialog box opens.

44. Click the **Select a Workflow Model** drop-down arrow and select **Approve for Adobe Campaign**.

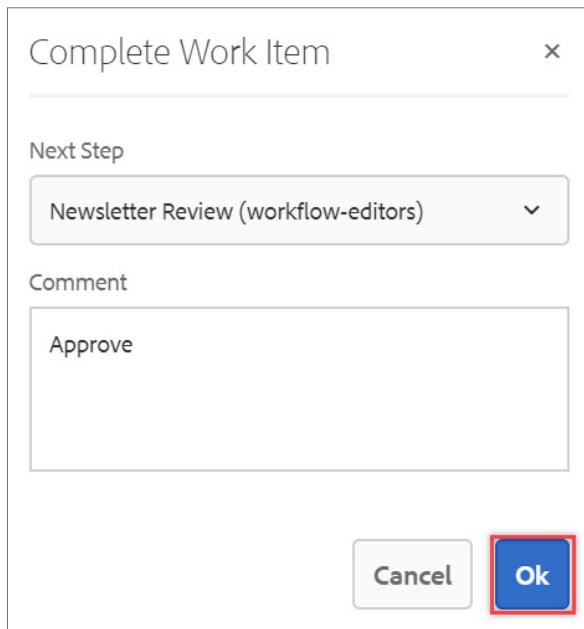
45. In the **Enter a title of workflow** field, type **Approval**.

46. Click **Start Workflow**. Notice that the page refreshes and displays a blue banner, as shown:



47. Click **Complete** to finish editing the email content. The **Complete Work Item** dialog box opens.

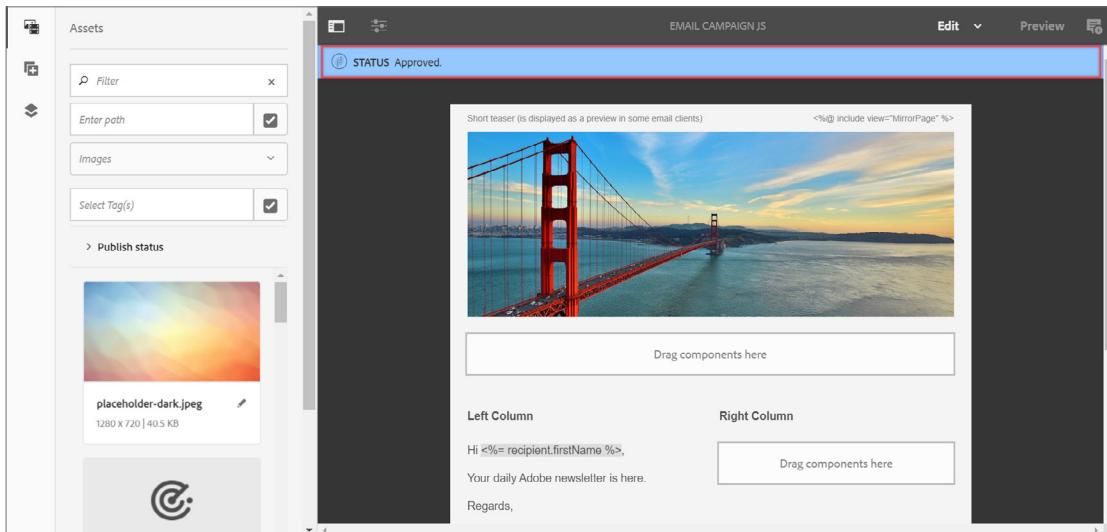
48. In the **Comment** section, type **Approve** and then click **Ok**, as shown. The page refreshes again and the workflow is now ready for approval.



49. Click **Complete**. The **Complete Work Item** dialog box opens.

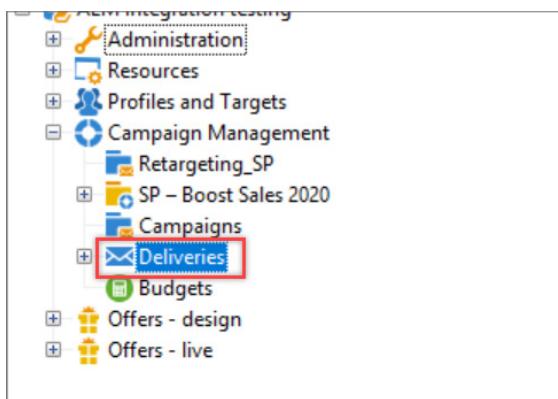
50. Click the drop-down arrow in the **Next Step** field and select **Newsletter Approval**.

51. In the **Comment** section, type **Approved** and then click **Ok**. The page refreshes and the blue banner displays the status of the email content as approved, as shown:



52. Open the Campaign Classic client console.

53. In the **Explorer** view, click the **Campaign Management** root folder and select **Deliveries**, as shown:



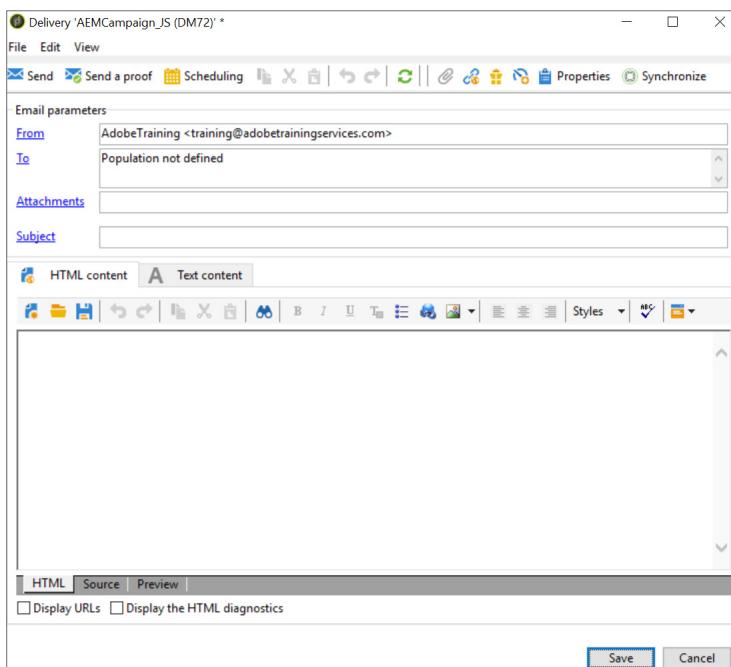
54. Click the **New** icon in the list view. The **Delivery 'Email delivery'** dialog box opens.

55. In the **Delivery template** field, click the drop-down arrow and select **Email delivery with AEM content (mailAEMContent)**. Click **OK** to close the **Please select a 'Deliveries' document** window

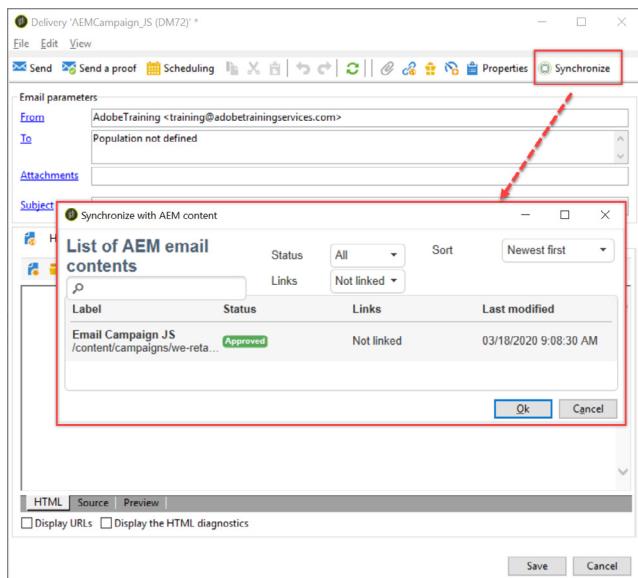
**Note:** If the templates are not available, you can click the **folder** icon. The **Please select a 'Deliveries' document** dialog box opens. In the **Folder** field, click the drop-down arrow. Expand **Resources > Templates** and then select **Delivery Templates**. The available delivery templates are displayed. You can select the required template and click **Ok** to add the template to the **Delivery template** field.

56. In the **Label** field, type **AEMCampaign\_JS <your initials>**. For example, type **AEMCampaign\_JS**.

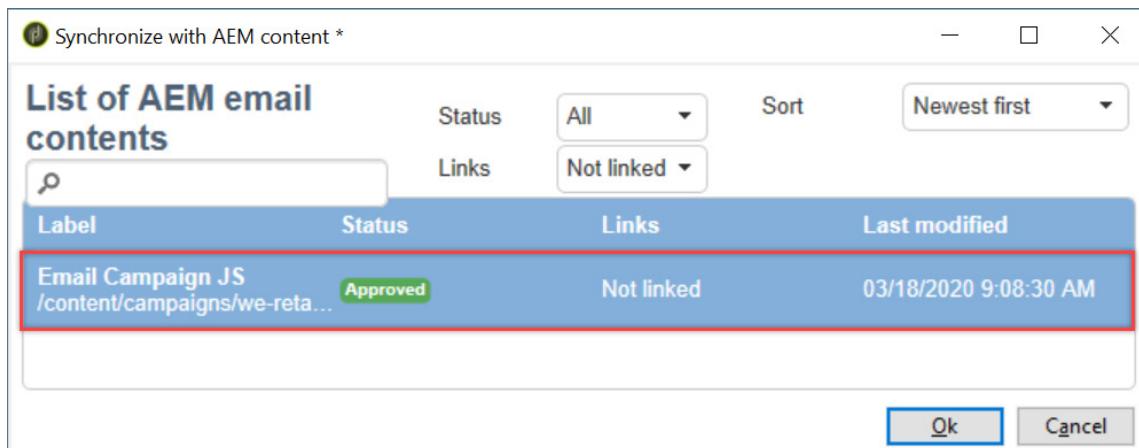
57. Click **Continue** to display the email content, as shown:



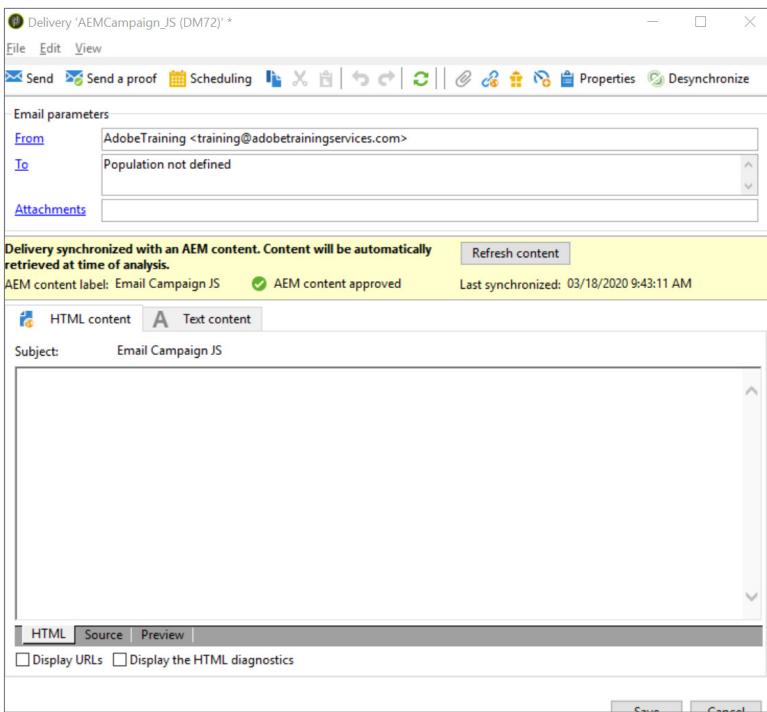
58. Click **Synchronize** on the toolbar to open the **Synchronize with AEM content** dialog box, as shown. Notice that the **Email Campaign <your initials>** email content that you created in Experience Manager is displayed in the dialog box with the **Approved** status.



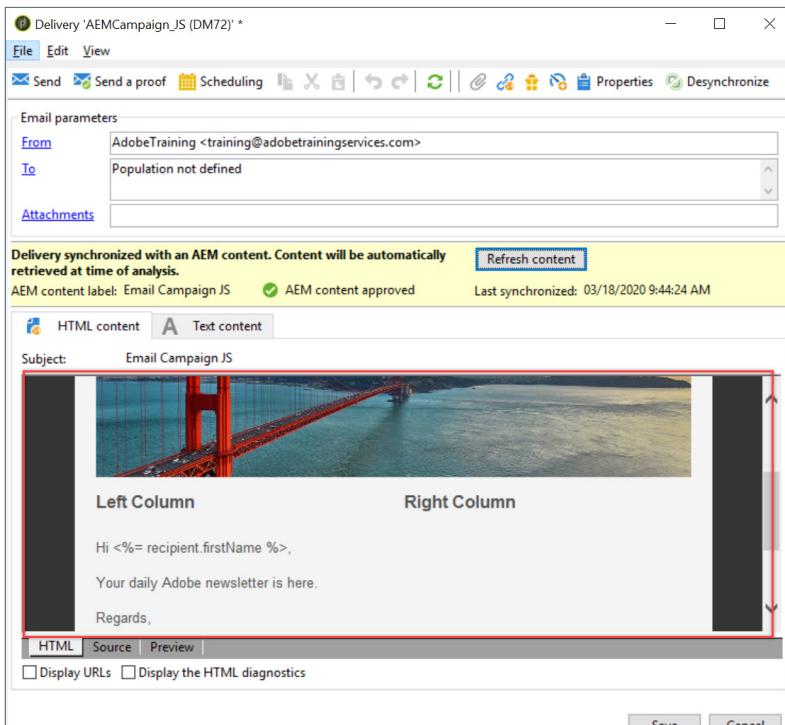
59. Select the **Email Campaign <your initials>** email content from the list, as shown:



60. Click **Ok** to add the Experience Manager content to the Delivery dialog box, as shown:



61. Click the **Refresh content** button to display the updated Experience Manager content in Adobe Campaign, as shown:



62. Click **Save** to close the delivery dialog box. You can edit the content as per your requirements and use the same content for delivery.

## Appendix

# Adobe Campaign Classic Interaction: An Overview

## Introduction

Consider the following scenarios:

- A travel company wants to create a campaign to send personalized travel offers to their customers through email.
- A bank wants to display an offer on their website aimed at new, unidentified visitors browsing their site. They also want to display payment reminders and personalized offers to their existing, registered customers.
- An apparel company wants to create and manage multiple offer catalogs, such as birthday offer, spring collection, and special discounts, so that relevant and timely offers can be sent to customers and targets.

How can organizations achieve these tasks efficiently? By using the Adobe Campaign Classic Interaction feature?

The Interaction feature in Campaign Classic enables you to interact with your customers and targets in real-time through customized offers. These offers can be regular communications or special offers on your products and services. You can communicate with your customers through channels such as a website, call centers, email, direct mail, and Short Message Service (SMS).

## Objectives

After completing this module, you will be able to:

- List Campaign Classic Interaction capabilities
- Describe the terminology used in Campaign Classic Interaction
- Explain the architecture of Campaign Classic Interaction
- Explain the process for delivering offers in Campaign Classic Interaction

## Campaign Classic Interaction: Capabilities

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Campaign Classic Interaction enables you to:

- Create and manage marketing offer catalogs
- Create and manage personalized offers associated with different channels
- Configure the criteria that enables you to send the most relevant offer to a contact
- Send relevant, timely, and personalized marketing offers to customers and targets based on individual profiles, past responses, and current behavior and preferences

# Campaign Classic Interaction: Terminology

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- **Offer:** Is marketing content or communication delivered to your customers through various communication channels. It includes elements such as a title, image, destination URL, and text.
- **Offer catalog:** Is a group of offers defined in Campaign Classic. The catalog is organized hierarchically with each node corresponding to a category.
- **Offer space:** Is a folder that determines where an offer is displayed. The offer space includes the offer structure, its rendering, and communication channel used. You can render the same offer in different ways in the same channel (for example, a website) by using different spaces.
- **Environment:** Is the root element of the offer catalog. It contains offers that can be delivered to a target. There are two types of environments:
  - Design environment: Used to create and edit offers.
  - Live environment: Used to deliver the offers.
- **Offer proposition:** Is the result of an action that leads to the presentation of one or more offers to a recipient in a space. For example, a banner on a website or an email. Each proposition is stored in the offer proposition table, which is referenced while proposing subsequent offers
- **Presentation rules:** Are typology rules that exclude offers based on the proposition history of a recipient. You can use presentation rules to control the flow of offer propositions.
- **Offer representation:** Is the information used by the channel to display an offer. When presenting an offer, its rendering depends on the offer space selected. That is, you will see the same offer rendered differently in an email and on a website.
- **Weight:** Indicates the relevance of an offer and helps select the most relevant offer. You will define weights when creating offers. Multiple eligible offers are considered in decreasing weight order.
- **Application themes:** Are tags or keywords defined in the category that helps you easily refer to related offers. You can also filter offers based on themes.
- **Eligibility rules:** Are constraints applied to an environment, category, or offer with respect to the validity period, target, and weight. You can use eligibility rules to ensure relevant offers are sent to recipients.
- **Category:** Is a folder in an environment where you will organize offers according to their type, eligibility rules, and application themes. A category can contain subcategories. The subcategories inherit all characteristics of the parent category.

- **Outbound interaction:** The brand gets in contact with a customer through channels, such as email, SMS, or direct mail. In this case, the same rules and processes are applied to each contact.
- **Inbound interaction:** A customer contacts the brand through the website or through calls to the customer care department.
- **Contacts:** Refer to customers and target population. There are two types of contacts:
  - › Identified contact: Is an existing contact in your database. In an outbound interaction, the contact is automatically identified.
  - › Anonymous contact: Is a contact whose information is not present in your database. However, the contact can be implicitly identified through cookies.
- **Batch mode:** Is generally used for outbound interactions. Here, you select the best offer for a set of contacts. The same eligibility rules are applied to each contact.
- **Unitary mode:** Is generally used for inbound interactions and transactional messages. In unitary mode, a single contact is processed one at a time.
- **Simulation:** By simulating offers, you can test the breakdown of offers on the recipients you want to target before sending offers.

# Campaign Classic Interaction: Architecture

## Environment

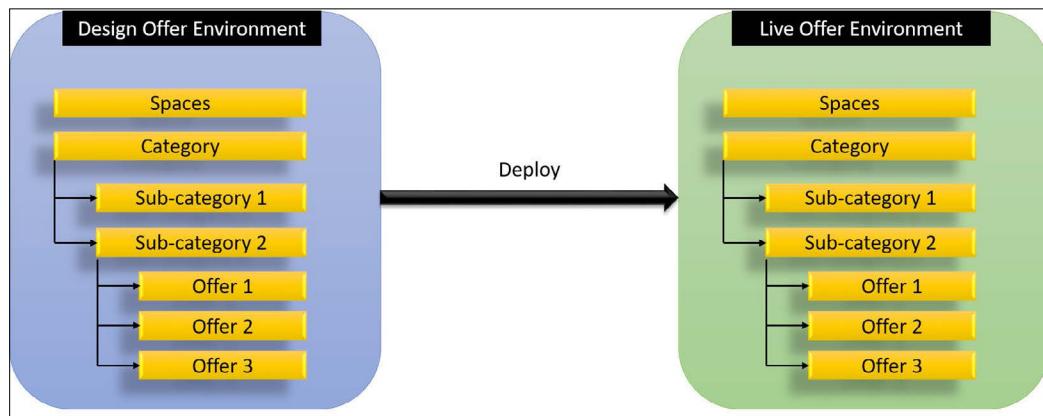
All offers are contained in environments. There are two types of offer environments in Interaction:

- Design environment
- Live environment

In the design environment, you will create and edit offers. These offers are not yet ready to be delivered to recipients. When you are satisfied with the offers you created, you will subject the offer content and eligibility rules to approval cycles.

Each design environment is linked to a live environment. After the approval process, the offer is deployed to the live environment. You cannot edit the approved offer in the live environment and is now available for delivery.

An environment includes offer spaces, categories, and offers as shown.



- You can configure the offer catalog content and delivery channels in the offer spaces. Offer spaces can only be created in the design environment by an administrator and are automatically duplicated to the live environment after the offer approval process.
- A category typically includes multiple subcategories. Each subcategory includes multiple offers.
- After offers are validated and approved, you will deploy the approved offers. During deployment, the whole catalog is duplicated from the design environment to the live environment.

## Operator Profiles

There are two user roles who can use Interaction in Campaign Classic—Offer Managers and Delivery Managers. They each have specific rights along with access to certain parts of the navigation tree and the platform. A user can have both profiles at the same time.

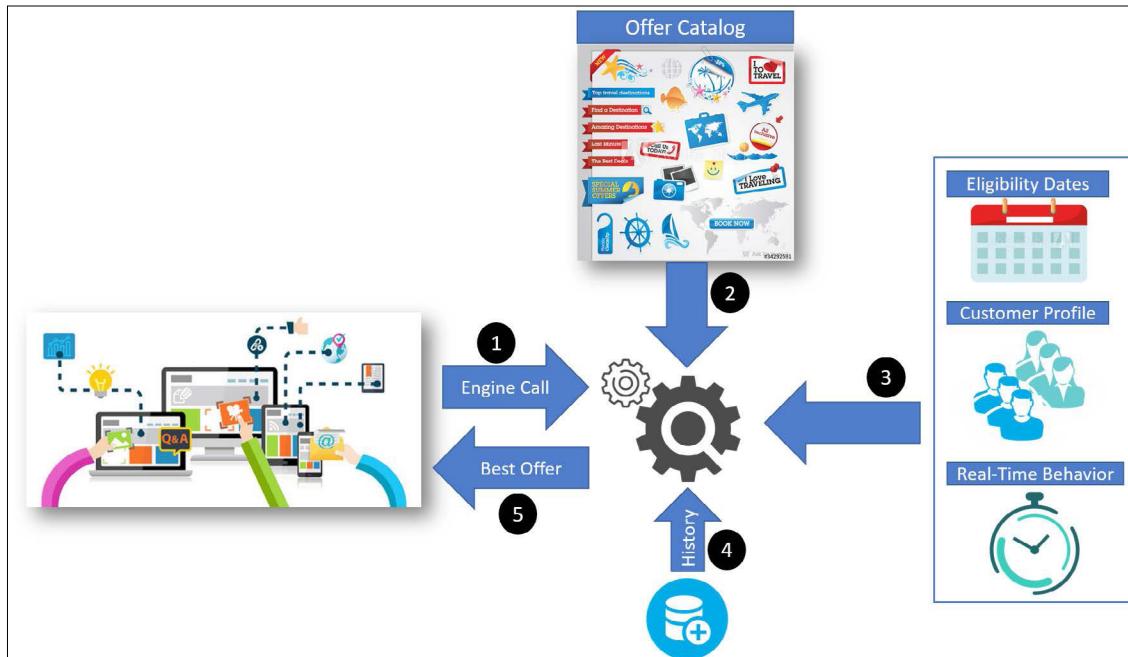
An Offer Manager can:

- Modify design environments
- View live environments
- Configure predefined spaces and filters
- Create and edit categories
- Create offers
- Configure offer eligibility
- Approve offers

A Delivery Manager can:

- Access only the live environment
- Approve offers
- Deliver offers

## Delivering Offers: The Process



1. A contact is established between a customer or target and the brand through various communication channels, such as email, SMS, direct mail, website, and social media pages. This results in a call to the offer engine.
2. When the engine call occurs, one or more offers are selected from the offer catalog depending on the number of offers set in the proposition field.
3. Eligibility rules are applied and the best offers are selected based on the offer start and end dates, profile, and real-time behavior of customers.
4. The recipient proposition history is updated after the selection is made. This ensures there is no duplication in the offers presented.
5. The best offer is proposed to the recipient.