

Module 1: Campaign management

This toolkit is designed for Adobe Campaign Classic Business Practitioner Expert Exam Aspirants. There are six modules. Study each module per week to stick to schedule. Technical parts of applications are depicted in videos, about which you can learn more from Experience League. You can visit Get prep page to understand the contents and anticipate the learning journey.

This is Business Practitioner Expert Exam, toolkit Module 1. This module contains five sections.

1.1 Campaign Classic v7 Documentation

What's New

- [March Release is live!](#)
Discover new capabilities, improvements, and fixes in the Release Notes
- [2022 Release Program](#)
Upgrade your environment and improve security, infrastructure, and performances
- [Update your Adobe Experience Cloud Triggers integration](#)
The legacy OAuth authentication service has reached end-of-life: you must migrate to Adobe I/O

[More updates](#)

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- [Upgrade to the latest build](#)
- [Send push notifications](#)

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Useful pages

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[How-to videos](#)

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[Get started with upgrades](#)

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Resources for developers

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[Monitoring guidelines](#)

1.2 Get started with marketing campaigns

Campaigns include actions (deliveries) and processes (importing or extracting files), as well as resources (marketing documents, delivery outlines). They are used in marketing campaigns. Campaigns are part of a program, and programs are included in a campaign plan.



Discover how to create a marketing plan, programs, and campaigns [in video](#)

To create a marketing campaign:

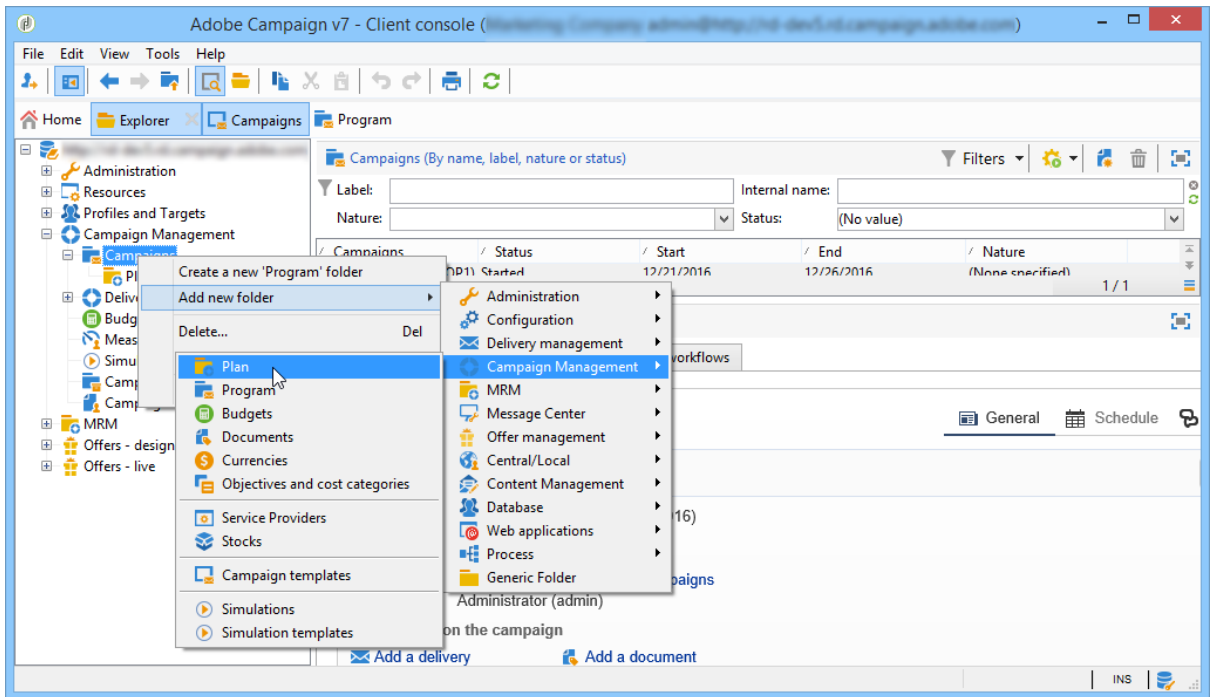
1. Create a campaign: discover campaigns and their characteristics: label, type, start and end dates, budget, associated resources, manager(s) and participants. [Learn more.](#)
2. Define target population(s): create a workflow with targeting queries. [Learn more.](#)
3. Create deliveries: select channel(s) and define the content to be sent. [Learn more.](#)
4. Approve deliveries. [Learn more.](#)
5. Monitor deliveries. [Learn more.](#)
6. Plan campaigns and associated costs. [Learn more.](#)

When these steps have been completed, you can start the deliveries (refer to [this section](#)), check the data, processes and information relating to the deliveries and, if necessary, manage the associated documents (refer to [this section](#)). You can also track the execution of the processing phases of campaigns and deliveries (refer to [this section](#)).

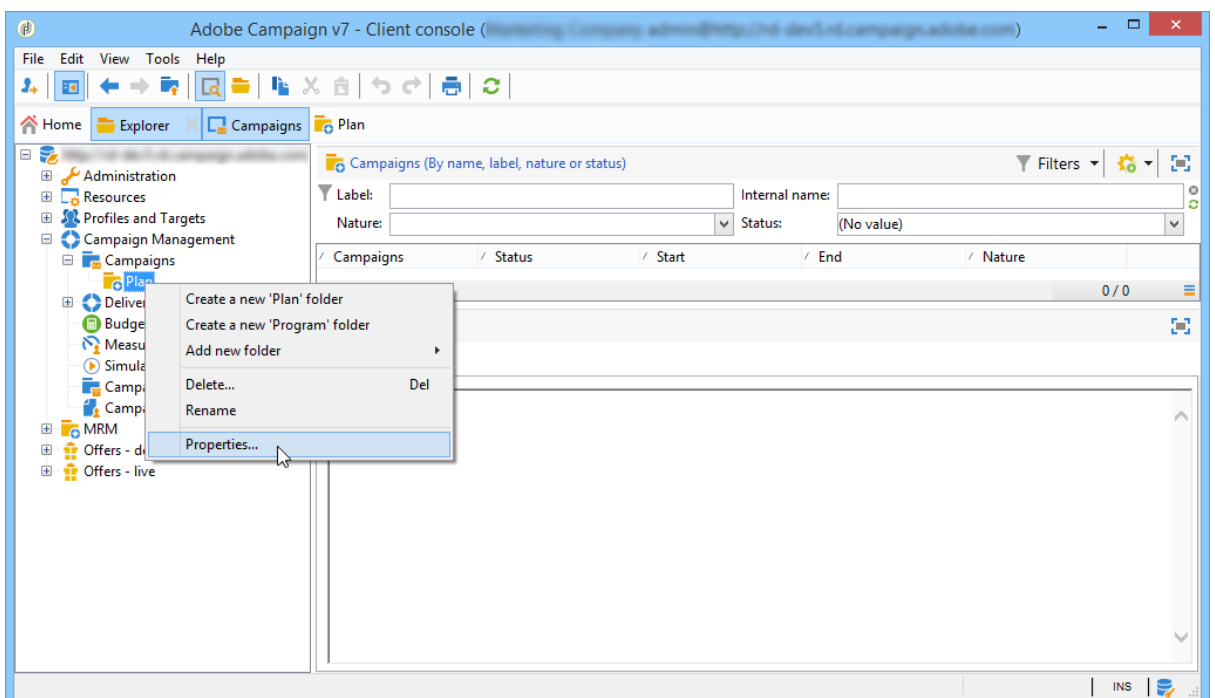
Create plan and program hierarchy

To configure your folder hierarchy for marketing plans and programs:

1. Click the **Explorer** icon on the home page.
2. Right-click the folder in which you want to create your plan.
3. Select **Add new folder > Campaign Management > Plan**.



4. Rename the plan.
5. Right-click the newly created plan and select **Properties...**

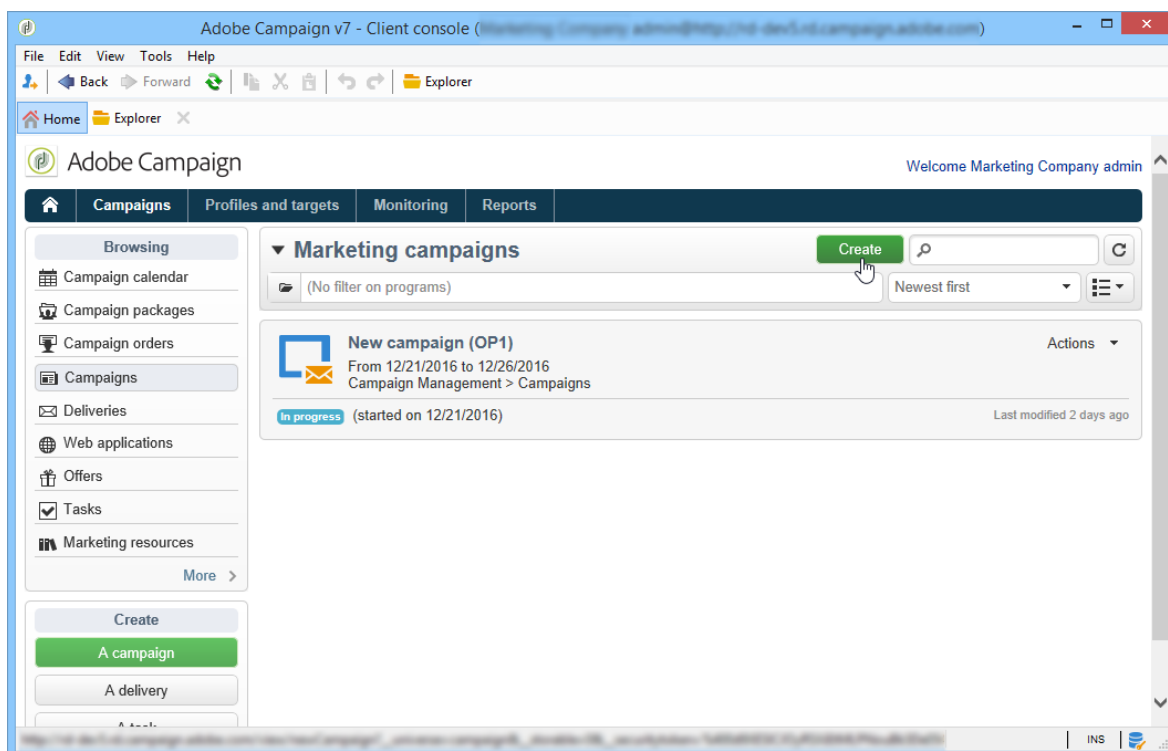


6. In the **General** tab, modify the **Internal name** to avoid duplicates during package exports.
7. Click **Save**.
8. Right-click the newly created plan and select **Create a new 'Program' folder**.
9. Repeat the above steps to rename your new program folder and its internal name.

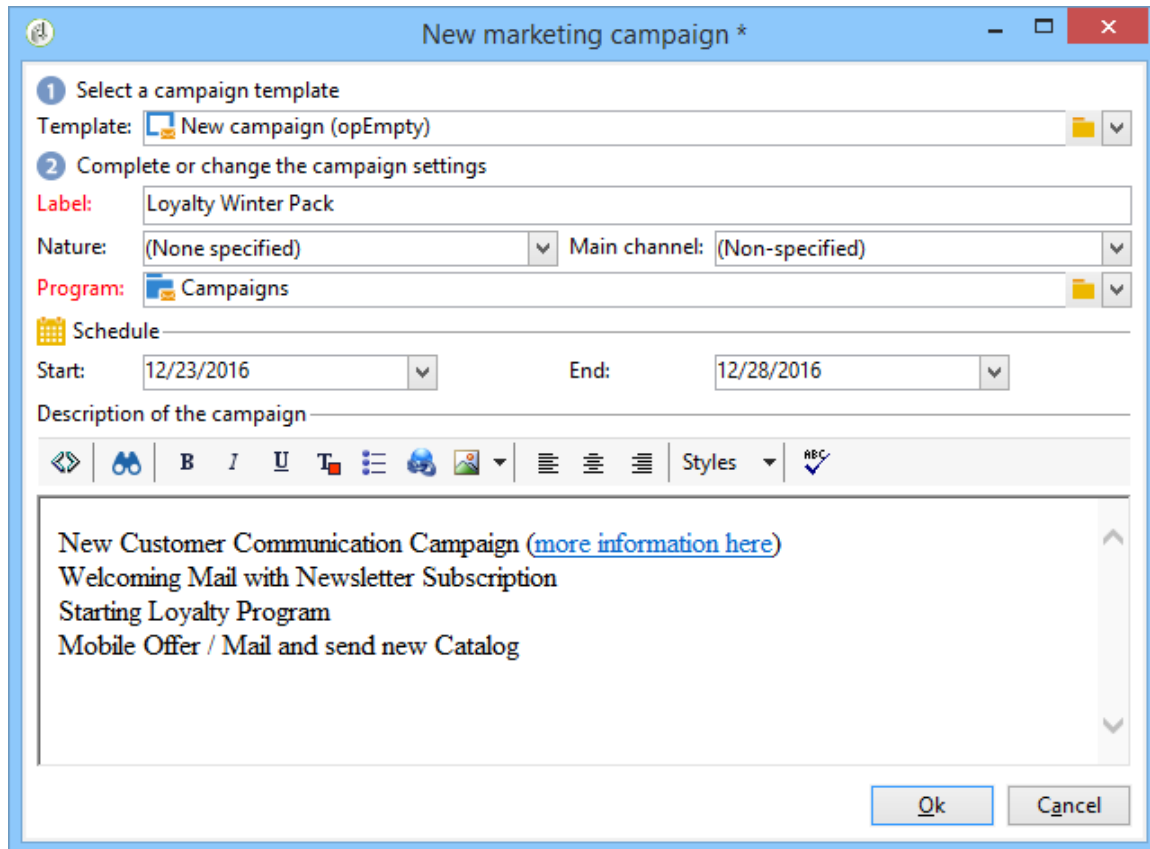
Create a campaign

Add a campaign

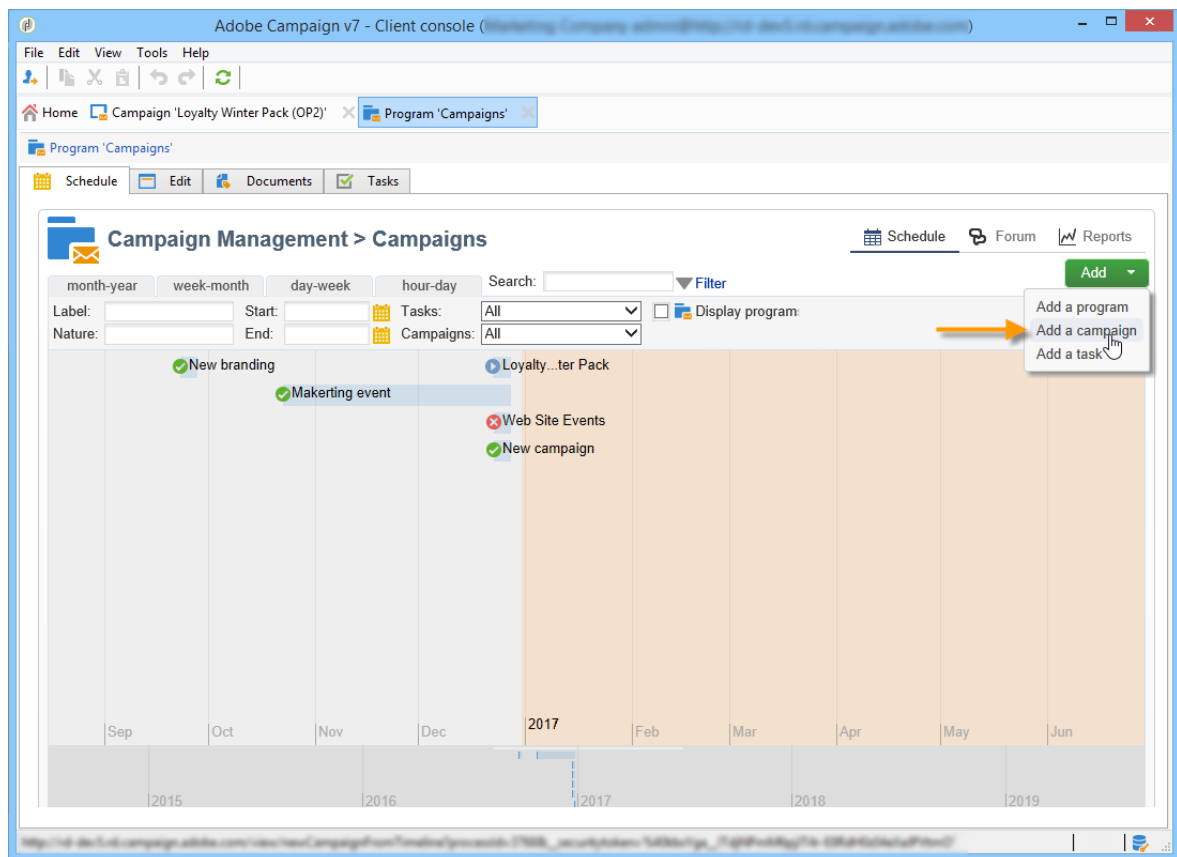
You can create a campaign via the list of campaigns. To display this view, select the **Campaigns** menu in the **Campaigns** dashboard.



The **Program** field lets you select the program to which the campaign will be attached. This information is mandatory.



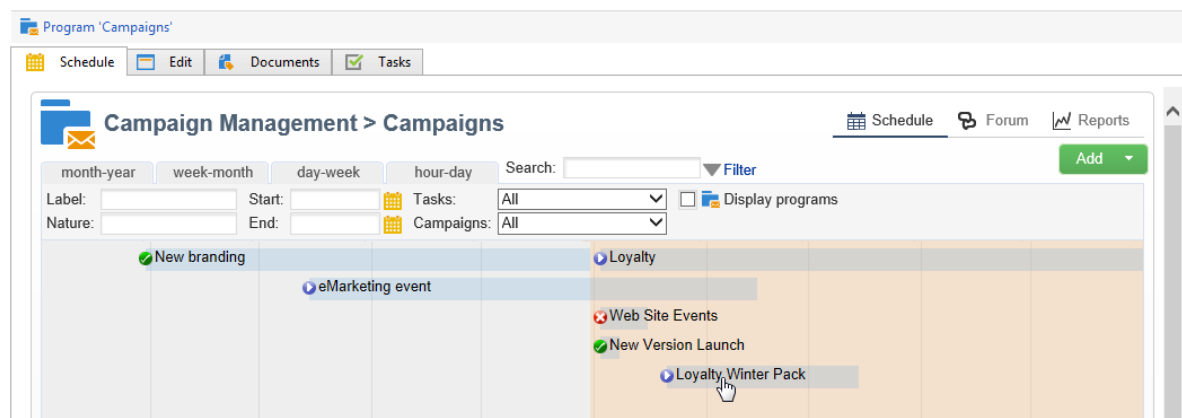
Campaigns can also be created via a program. To do this, click the **Add** button in the **Schedule** tab of the concerned program.



When you create a campaign via the **Schedule** tab of a program, the campaign is automatically linked to the concerned program. The **Program** field is hidden in this case.

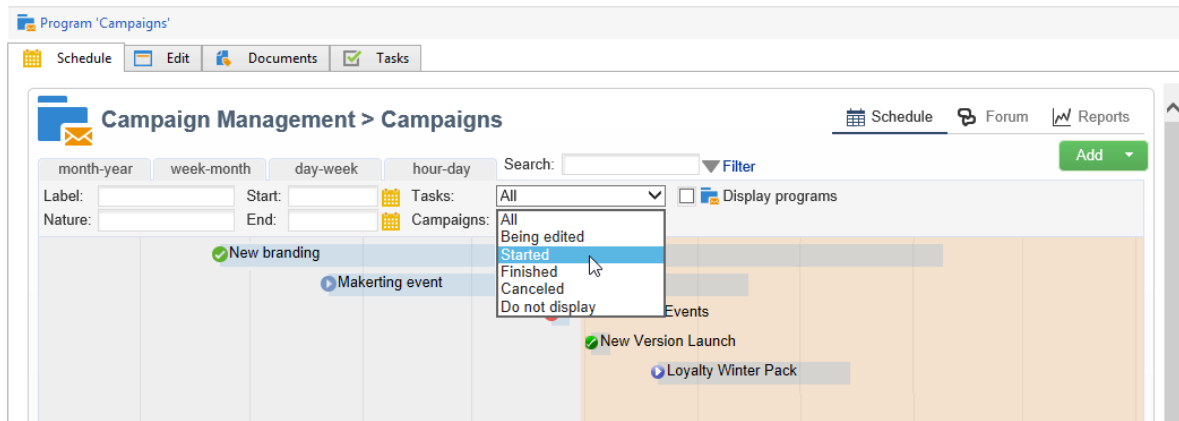
In the campaign creation window, select the campaign template and add a name and a description of the campaign. You can also specify the campaign start and end dates.

Click **OK** to create the campaign. It is added to the program schedule.



NOTE

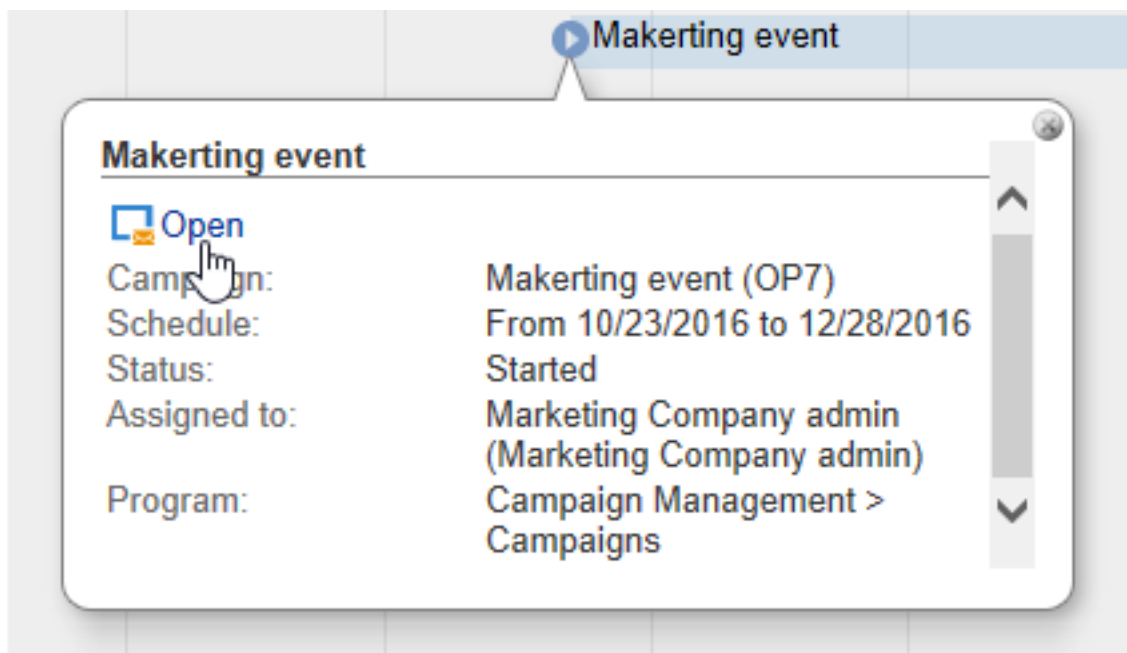
To filter the campaigns to display, click the **Filter** link and select the status of campaigns to display.



Edit and configure a campaign

You can then edit the campaign you have just created and define its parameters.

To open and configure a campaign, select it from the schedule and click **Open**.



This takes you to the campaign dashboard.

Recurring and periodic campaigns

A recurring campaign is a campaign based on a specific template, whose workflows are configured to be executed according to an associated schedule. The workflows will therefore be recurring within a campaign. The targeting is duplicated on each execution and the various processes and target populations are tracked. It is also possible to execute future targetings in advance, via the coverage period during automatic workflow creation, in order to launch simulations with target estimates.

A periodic campaign is a campaign created automatically according to the execution schedule of its template.

Create a recurring campaign

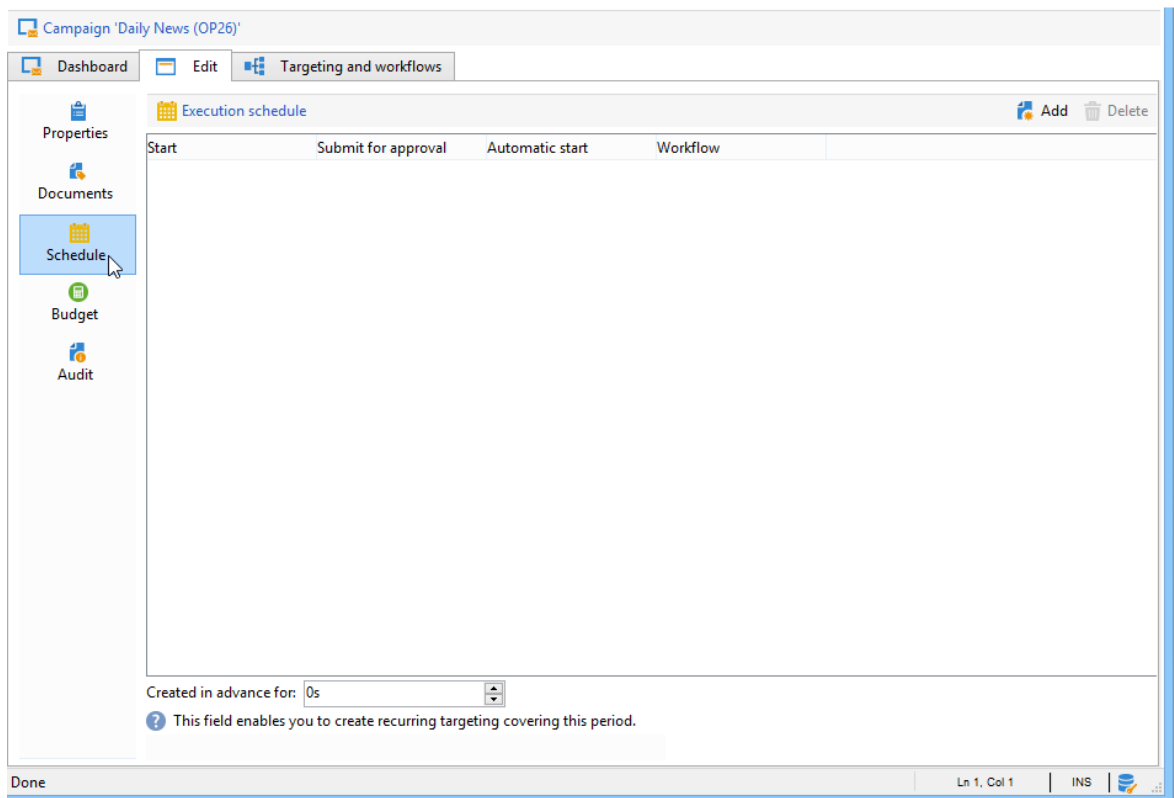
Recurring campaigns are created from a specific template defining the workflow template to be executed and the execution schedule.

Create a template for recurring campaigns

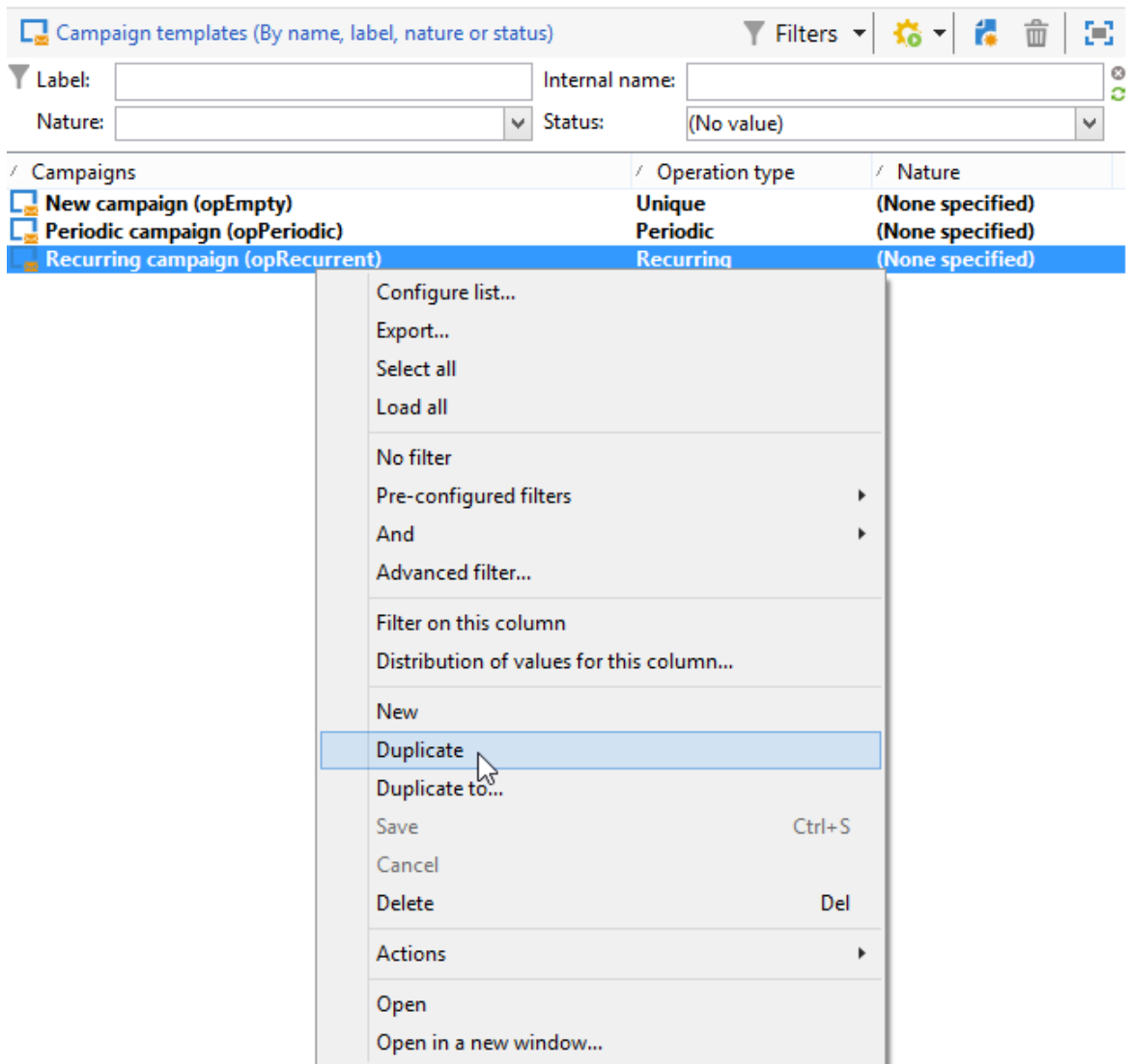
1. Create a **Recurring** campaign template.

NOTE

It is recommended that you duplicate the default template instead of creating an empty template.

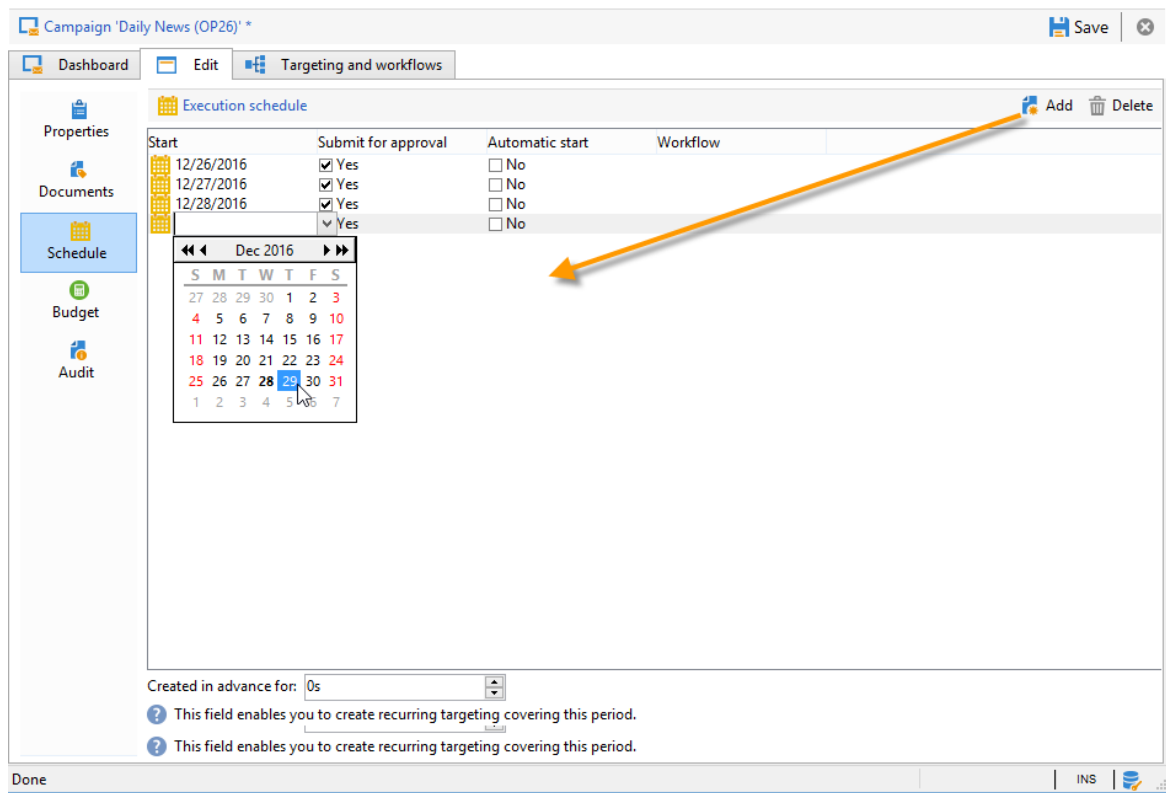


2. Enter the name of the template and the duration of the campaign.



- For this type of campaign, a **Schedule** tab is added in order to create the template execution schedule.

In this tab, specify the planned execution dates of the campaigns based on this template.



The configuration mode of the execution schedule coincides with the **Scheduler** object of the Workflow. For more on this, refer to [this section](#).

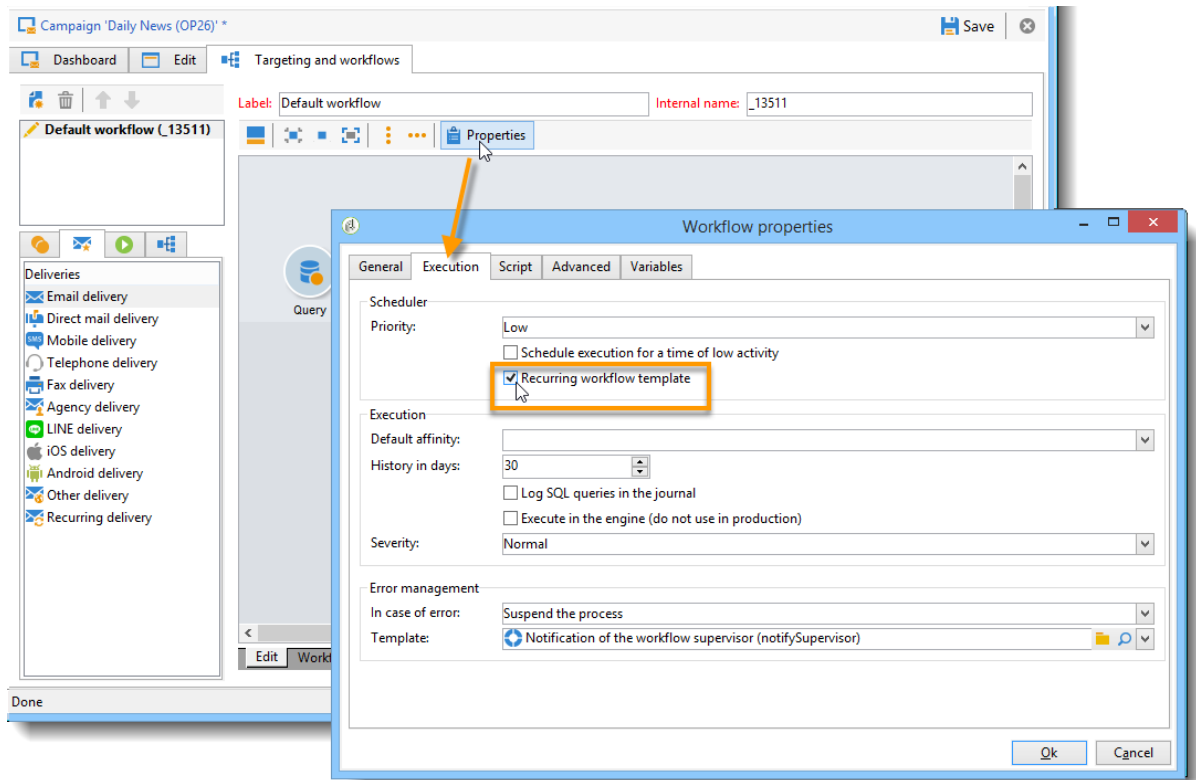
IMPORTANT

Execution schedule configuration must be performed carefully to avoid overloading the database. Recurring campaigns duplicate the workflow(s) of their template depending on the specified schedule. The implementation of excessively frequent workflow creation can hinder the operation of the database.

1. Specify a value in the **Create in advance for** field in order to create the corresponding workflows for the period indicated.
2. Create the workflow template to be used in campaigns based on this template, with the targeting parameters and one or more generic deliveries.

NOTE

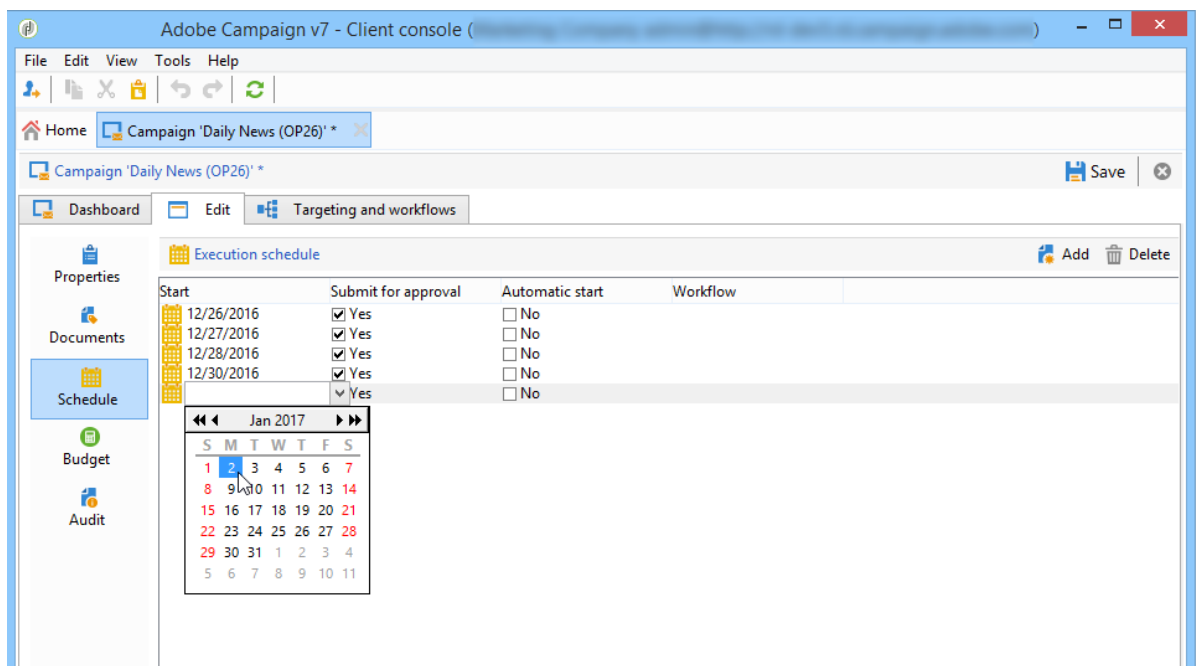
This workflow must be saved as a recurring workflow template. To do this, edit the workflow properties and select the **Recurring workflow template** option in the **Execution** tab.



Create the recurring campaign

To create the recurring campaign and execute its workflows according to the schedule defined in the template, apply the following procedure:

1. Create a new campaign based on a recurring campaign template.
2. Fill in the workflow execution schedule.



3. The campaign schedule lets you enter an automatic workflow creation or execution start date for each line.

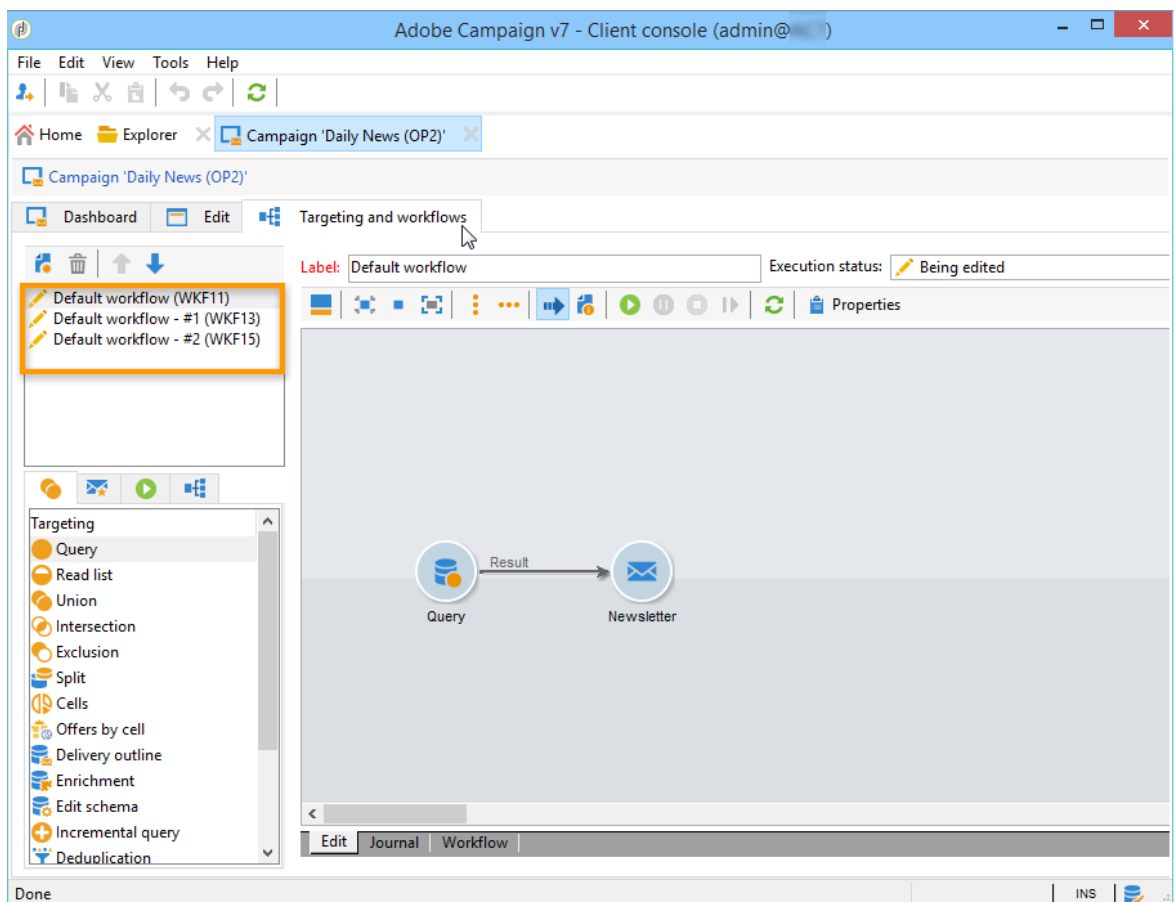
For each line, you can add the following additional options:

- **To be approved** : lets you force the delivery approval requests in the workflow.
- **To be started** : lets you start the workflow when the start date has been reached.

The **Create in advance for** field lets you create all the workflows covering the period entered.

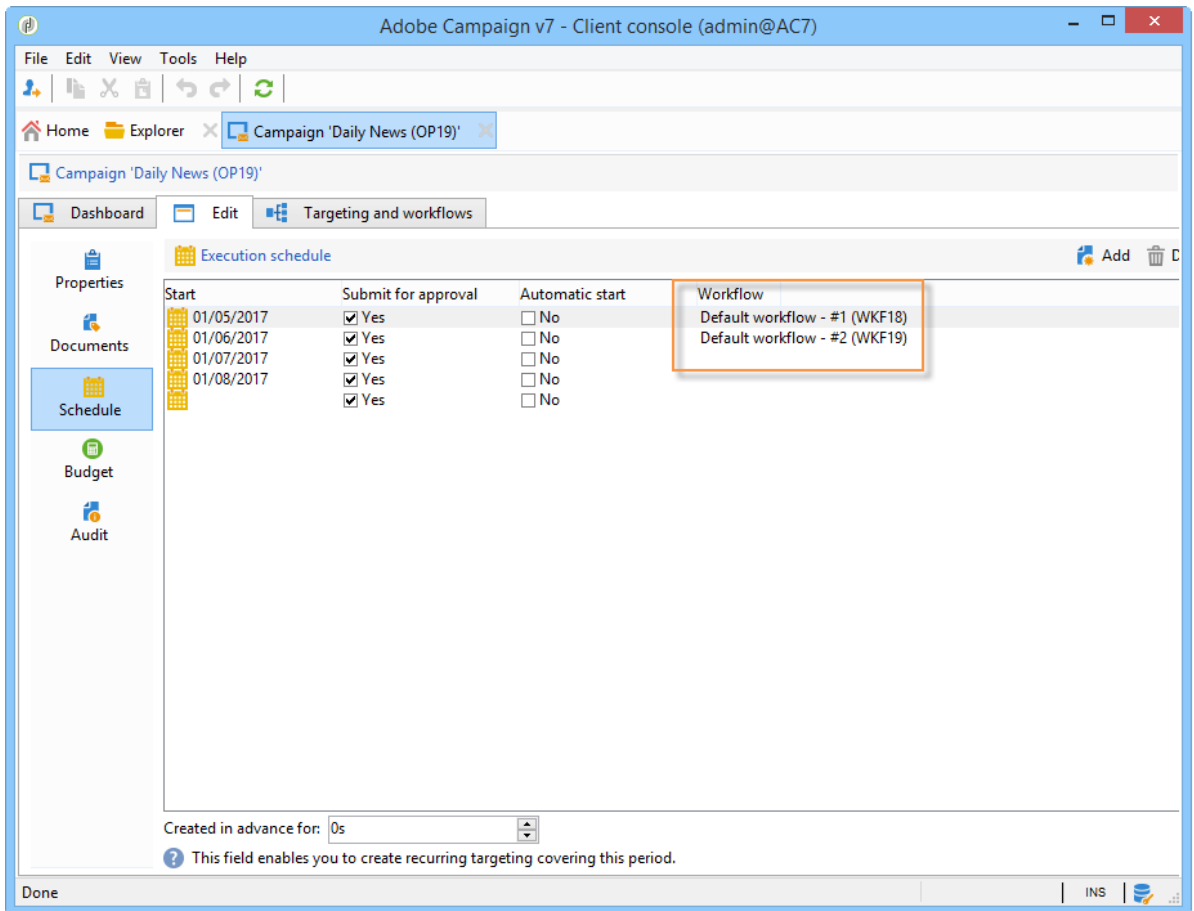
Upon execution of the **Jobs on campaigns** workflow, the dedicated workflows are created based on the occurrences defined in the campaign schedule. A workflow is thus created for each execution date.

4. Recurring workflows are created automatically from the workflow template present in the campaign. They are visible from the **Targeting and workflows** tab of the campaign.

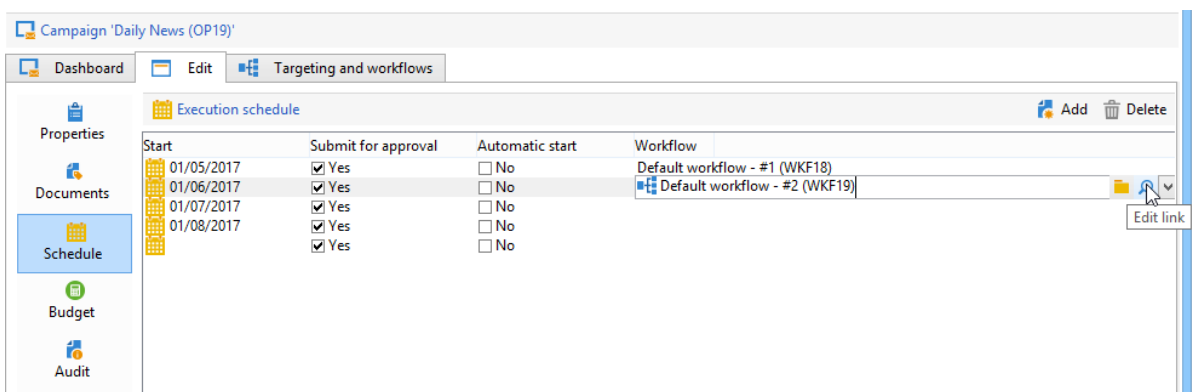


The label of a recurring workflow instance consists of its template label and the workflow number, with the # character in between.

Workflows created from the schedule are automatically associated with it in the **Workflow** column of the **Schedule** tab.



Each workflow can be edited from this tab.



NOTE

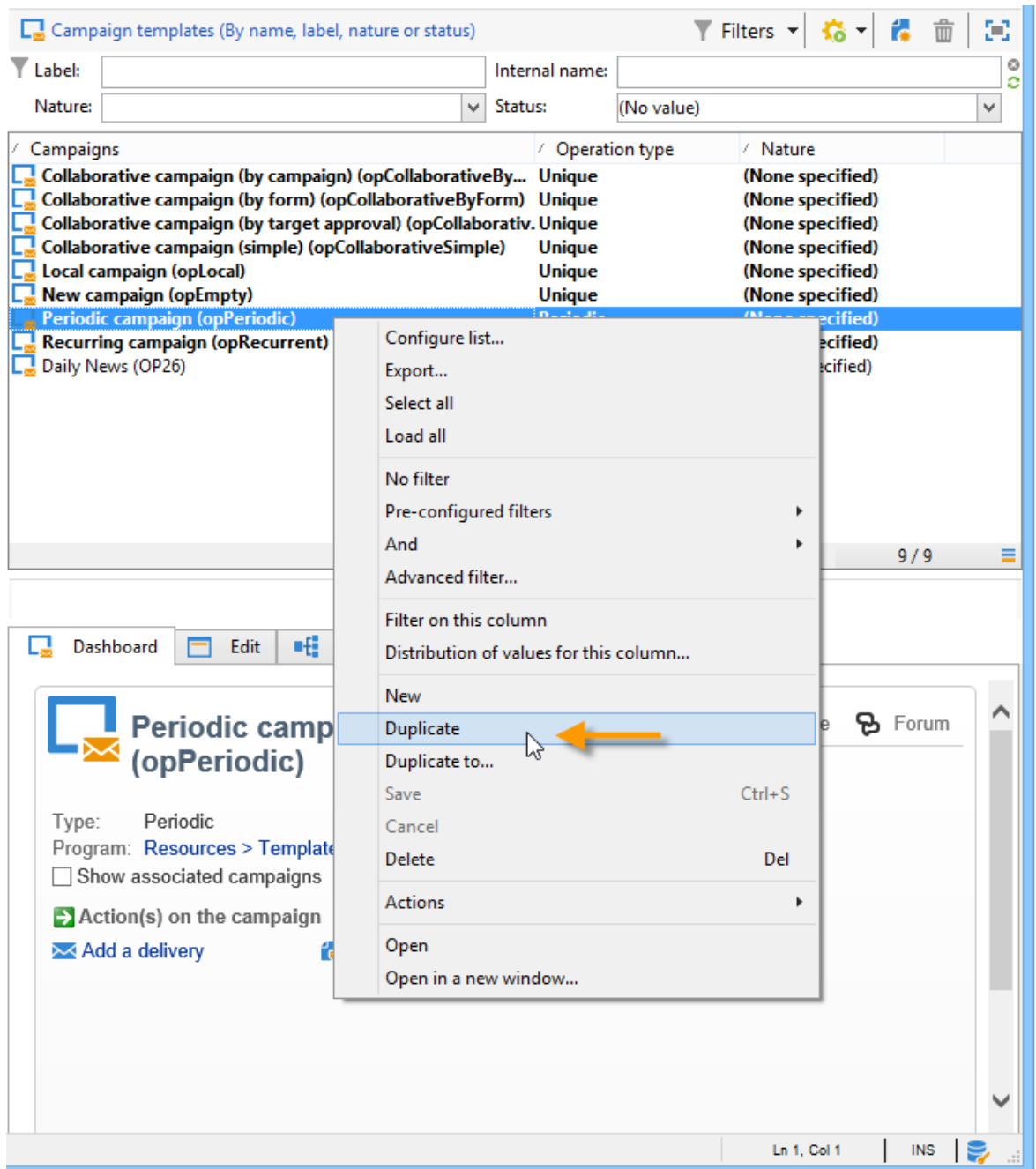
The start date of the schedule line associated with the workflow is available from a variable of the workflow with the following syntax:
`$date(instance/vars/@startPlanningDate)`

Create a periodic campaign

A periodic campaign is a campaign based on a specific template that lets you create campaign instances based on an execution schedule. Campaign instances are created automatically based on a periodic campaign template, depending on the frequency defined in the template schedule.

Create the campaign template

1. Create a **Periodic** campaign template, preferably by duplicating an existing campaign template.

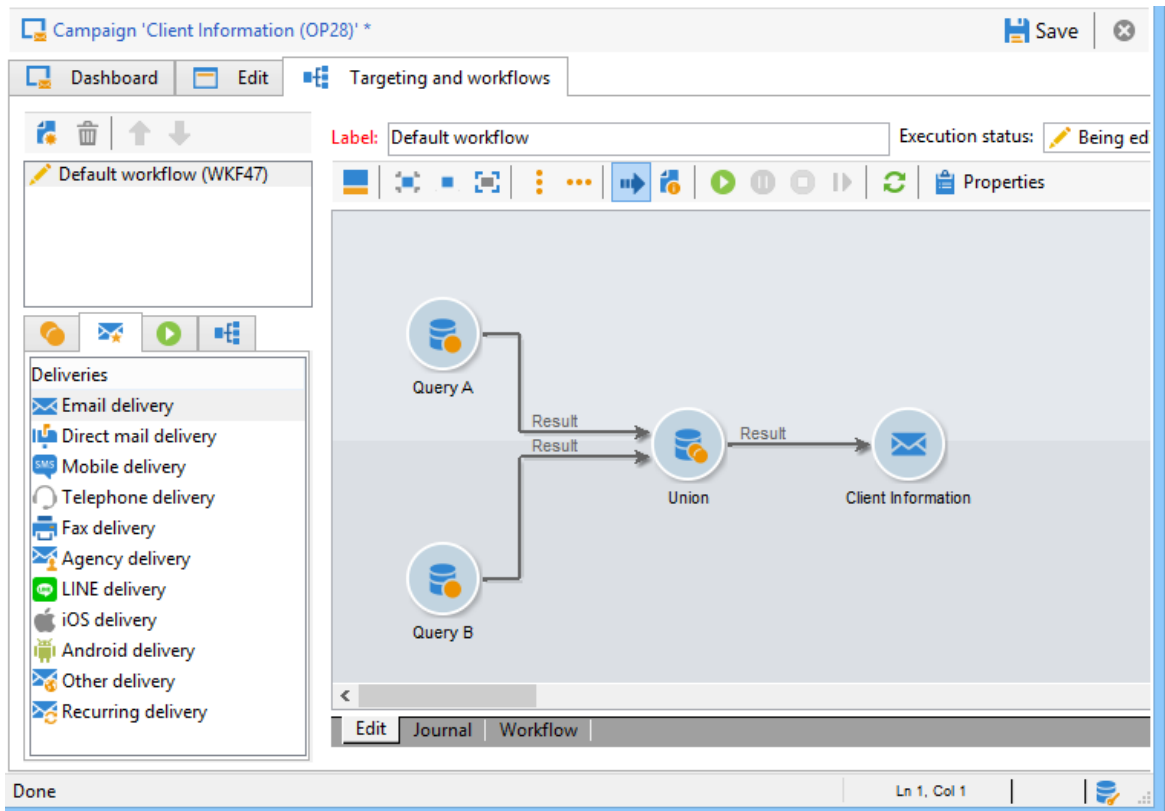


2. Enter the properties of the template.

NOTE

The operator whom the template is assigned to needs to have the appropriate rights to create campaigns in the selected program.

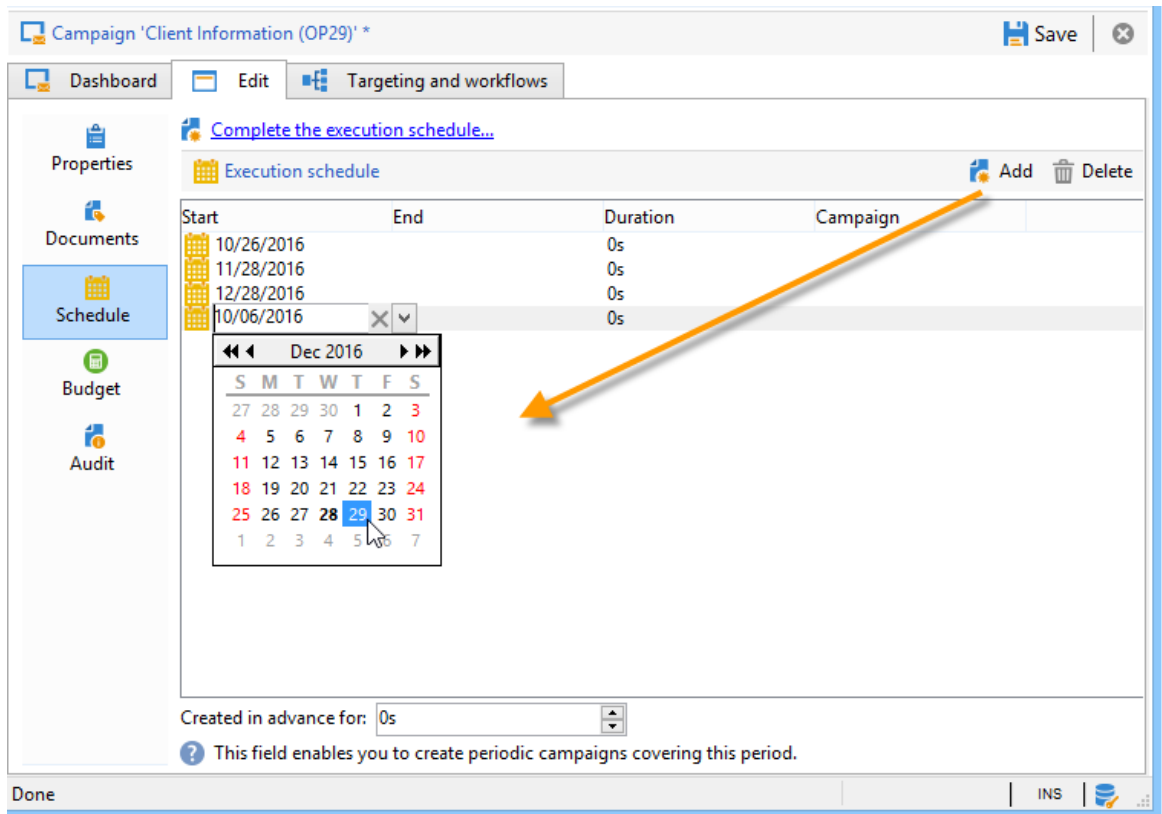
3. Create the workflow associated with this template. It will be duplicated in every periodic campaign created by the template.



NOTE

This workflow is a workflow template. It cannot be executed from the campaign template.

4. Complete its execution schedule as for a recurring campaign template: click the **Add** button and define the start and end dates, or fill in the execution schedule via the link.

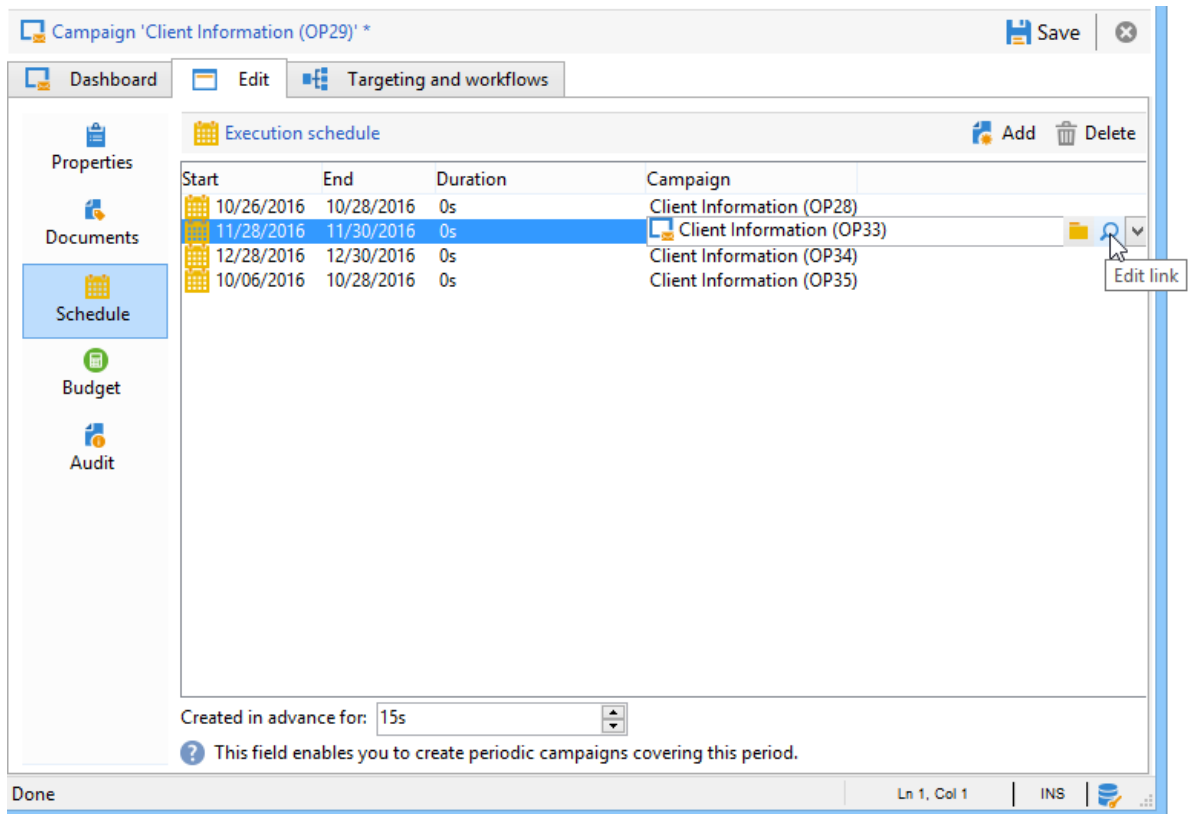


IMPORTANT

Periodic campaign templates create new campaigns according to the schedule defined above. It must therefore be completed carefully, to avoid overloading the Adobe Campaign database.

- Once the execution start date is reached, the matching campaign is created automatically. It takes on all the characteristics of its template.

Each campaign can be edited via the template schedule.



Each periodic campaign contains the same elements. Once created, it is managed as a standard campaign.

Tutorial video

This video shows how to create a marketing plan, programs, and campaigns.

Additional Campaign how-to videos are available [here](#).

1.3 About seed addresses

Seed addresses are used to target recipients who do not match the defined target criteria. This way, recipients who are out of the delivery scope can receive the delivery, as any other target recipient would.

Once of the main reason for using them is **your mailing list protection**. Inserting seed addresses into your mailing list lets you be noticed if it is being used by a third party, as the seed addresses it contains will receive the deliveries sent to your mailing list.

Moreover, seed addresses let you **preview and test the deliveries personalization and rendering** before their sending, by sending them proofs (see [Use seed addresses as proof](#)).



[Discover this feature in video](#)

The seed addresses feature has the following benefits:

- Random substitution of fields with data taken from recipient profiles: this lets you enter only the email address, for instance in the seed address section, and let Campaign automatically fill in the other fields from the profile (see [Use case: configure the field substitution](#)).
- When using a workflow with Datamanagement functionalities, the additional data processed in deliveries can be entered at seed address level to force values: this sidesteps random value substitution.
- Seed addresses are automatically excluded from reports on the following delivery statistics: **Clicks, Opens, Unsubscriptions**.

Seed addresses are added to the target of deliveries by being imported or by being created directly in the delivery or the campaign.

NOTE

Seed addresses do not belong to the recipients table, they are created in a separate table. If you extend the recipients table with new data, you have to extend the seed addresses table as well with the same data. Otherwise, they extended fields will not be taken into account for seed addresses.

An example of how to extend the seed addresses table is presented in this section: [Use case: select seed addresses on criteria](#).

For direct mail deliveries, seed addresses are added during extraction and mixed in the output document.

IMPORTANT

For direct mail deliveries, the extraction file format must comply with the following limitations:

- It must not use the option **Handle groupings (GROUP BY+HAVING)**.
- If element collections are extracted, these fields will have an empty value for the seed addresses, unless the **Single row (expert user)** option is selected. For more on this, refer to [this section](#).

1.4 Adobe Campaign Classic V7 tutorials

Adobe Campaign provides a platform for designing cross-channel customer experiences and provides an environment for visual campaign orchestration, real time interaction

management, and cross-channel execution. This user guide contains videos and tutorials on the many features and capabilities of Adobe Campaign Classic V7.

INFO

Do you have questions? Would you like to share your experience or exchange thoughts with your peers? Or, do you have feedback on the learning content for the Adobe team? Join the conversation in the [Adobe Campaign learning community thread!](#)

What's new

- [Design email delivery content](#)
Learn how to configure, personalize, and test email delivery content. Understand how to use templates, upload images, add emoticons, and embed bar codes and QR codes.
- [Create a survey](#)
Learn how to create a survey in Adobe Campaign Classic.
- [Add attachments to an email delivery](#)
Learn how to add attachments to an email delivery and how to configure different types of email attachments.

Most popular videos

- [Introduction to Adobe Campaign Classic](#)
- [Install and set up the Adobe Campaign Client](#)
- [Send and validate proofs](#)

Recommended courses

- [Getting started with Adobe Campaign Classic for Business Users](#)
- [Building advanced campaigns with Adobe Campaign Classic for Business Users](#)
- [Enhance your email delivery with Experience Manager content](#)

Staff picks

- [Workflow Heatmaps](#)
- [Audit Trail](#)
- [Defining Interactive Email Content with AMP](#)

Additional resources

- [Documentation](#)

1.5 Use a custom recipient table

This section details the principles for using a custom (or external) recipient table.

By default, Adobe Campaign offers a built-in recipient table to which out-of-the-box functions and processes are linked. The built-in recipient table has a number of predefined fields and tables that can be easily extended using an extension table.

If this extension method offers good flexibility to extend a table, it does not allow the number of fields or links in it to be reduced. Using a non-standard table, or 'external recipient table', allows for a greater flexibility but requires certain precautions when implementing it.

This functionality allows Adobe Campaign to process data from an external database: this data will be used as a set of profiles for deliveries. Implementing this process involves several precisions that may be relevant according to the client's needs. Such as:

- No update stream to and from the Adobe Campaign database: data from this table can be updated directly via the database engine that hosts it.
- No changes in the processes operating on the existing database.
- Using a profile database with a non-standard structure: possibility of delivering to profiles saved in various tables with various structures, using a single instance.
- No changes or maintenance required when updating the Adobe Campaign database.
- The built-in recipient table is useless if you do not need most of the table fields or if the database template is not centered on the recipients.
- In order to be efficient, a table with few fields is needed if you have a significant number of profiles. The built-in recipient table has too many fields for this specific case.

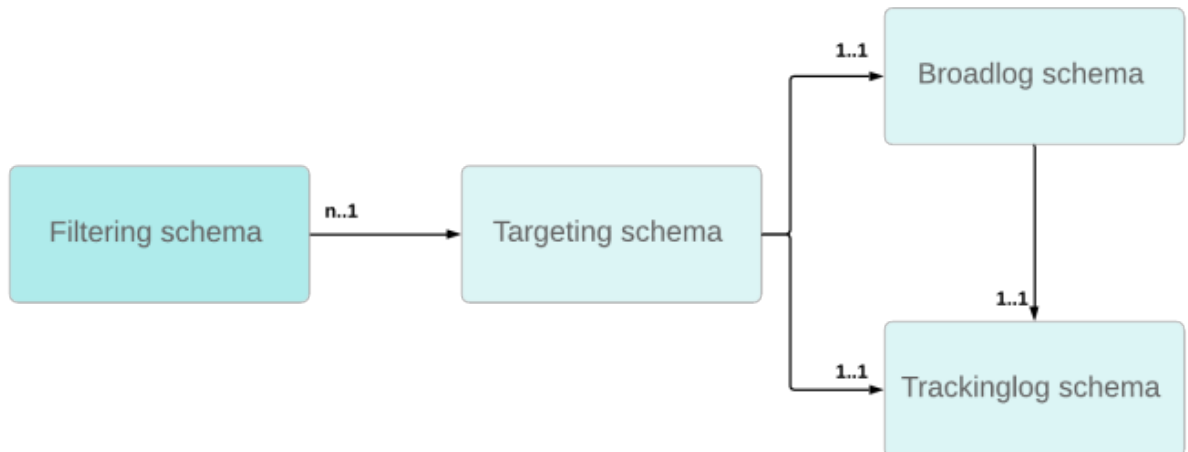
This section describes the key points that let you map existing tables in Adobe Campaign and the configuration to apply to execute deliveries based on any table. Finally, it describes how to provide users with querying interfaces as practical as those available with the built-in recipient table. To understand the material presented in this section, good knowledge of the principles of screen and schema design is required.

Recommendations and limitations

Using a custom recipient table has the following limitations:

- Adobe Campaign does not support multiple recipient schemas, know as targeting schemas, linked to the same broadlog and/or trackinglog schemas. This can otherwise lead to anomalies in data reconciliation afterwards.

The graphic below details the required relational structure for each custom recipient schema:



We recommend:

- Dedicating the **nms:BroadLogRcp** and **nms:TrackingLogRcp** schemas to the out-of-the-box **nms:Recipientschema**. Those two log tables should not be linked to any additional custom recipient table.
- Defining dedicated custom broadlog and trackinglog schemas for each new custom recipient schema. This can be automatically done when setting up the target mapping, see [Target mapping](#).
- You cannot use the standard **Services and Subscriptions** offered in the product.

This means the overall operation detailed in [this section](#) is not applicable.

- The link with the **visitor** table does not work.

Thus, to use the **Social Marketing** module you must configure the storage step to reference the correct table.

Similarly, when using referral functions, the standard initial message transfer template must be adapted.

- You cannot manually add profiles in a list.

Therefore, the procedure detailed in [this section](#) is not applicable without an additional configuration.

NOTE

You can still create recipient lists using workflows. For more on this, refer to [Creating a profile list with a workflow](#).

We also recommend checking the default values used in the different out-of-the-box configurations: depending on the functionalities used, several adaptations must be carried out.

For example:

- Certain standard reports, particularly those offered by **Interaction** and the **Mobile Applications** must be redeveloped. Refer to the [Managing reports](#) section.
- The default configurations for certain workflow activities reference the standard recipients table (**nms:recipient**): these configurations must be changed when used for an external recipients table. Refer to the [Managing workflows](#) section.
- The standard **Unsubscription link** personalization block must be adapted.
- The target mapping of the standard delivery templates must be modified.
- V4 forms are not compatible for use with an external recipients table: you must use web applications.