







94





CAMPAIGN MANAGER
USER



785222 6500523 50



785217 6500522 50



785197 6500166 00



785192 6500165 00



785169 6500151 5

Contents

26

3	creating campaigns
4	Editing campaign information
5	Duplicating & Archiving a campaign
6	view & restore archived Campaigns
7	Initial Setup of a campaign
8	Initial Setup of a campaign (con't)
9	Initial Setup of a campaign (con't)
10	adding products to a campaign
11	adding products to a campaign (Con't)
12	searching products in a campaign
13	Viewing Product Information
14	Creating a Job Group
15	Creating & deleting a Job
16	Adding products to a job
17	searching products in a job
18	Updating promotional data with a csv file
19	job specific images
20	job specific images (con't)
21	job specific images (con't)
22	job specific data
23	removing products from a job
24	removing products from a campaign
25	Exporting a job

Exporting a campaign

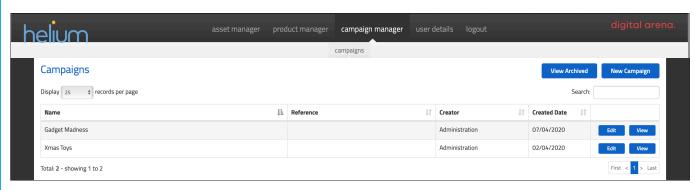
creating campaigns

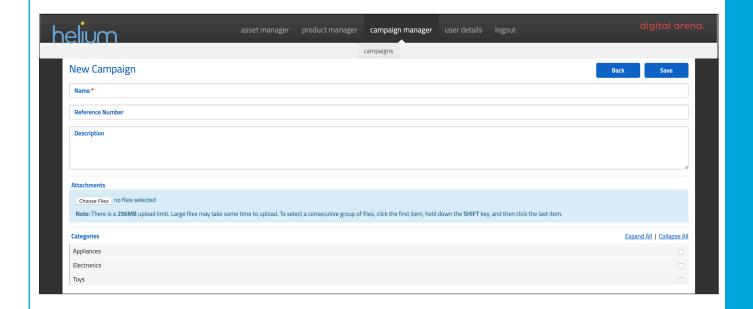
Campaign Manager

Campaign Manager allows you to bring products into a Campaign. This organisation facilitates a central hub for managing product promotional information for various outputs.

Creating a Campaign

- From the campaign manager top menu choose campaigns
- Click **New Campaign**
- Give the campaign a name, reference or description.
- Select the product categories to use in the campaign by selecting the appropriate checkboxes.
- 5. Click Save

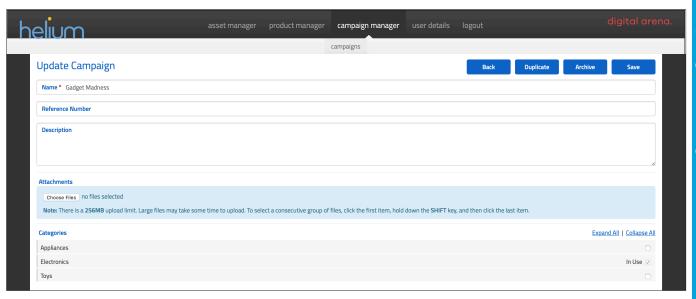




NOTE: Category allocation not only assigns which products can be used in the campaign, but also which users can see and access the campaign.

Editing campaign information

- From the campaign manager top menu choose campaigns
- 2. Select the campaign, you want to edit. Click **Edit**
- 3. Change details as required for name, reference number and description. You can also add and remove categories.
- 4. When complete. Click Save



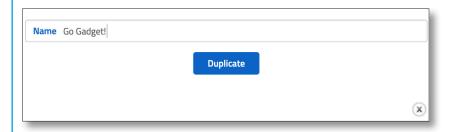


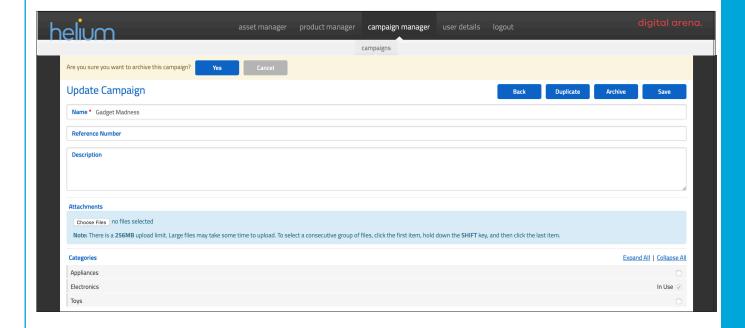
Duplicating a campaign

- From the campaign manager top menu choose campaigns
- 2. Click **edit** on the campaign you want to duplicate
- 3. Click the duplicate button, name your duplicated campaign.
- 4. Click duplicate

Archiving a campaign

- 1. From campaign manager top menu choose **campaigns**
- 2. Select the campaign, you want to edit. Click **Edit**
- Click **Archive**. You will be prompted to confirm whether you wish to proceed. (yes/cancel)





NOTE: Duplicating a campaign will duplicate the categories and the contents of the product bucket.

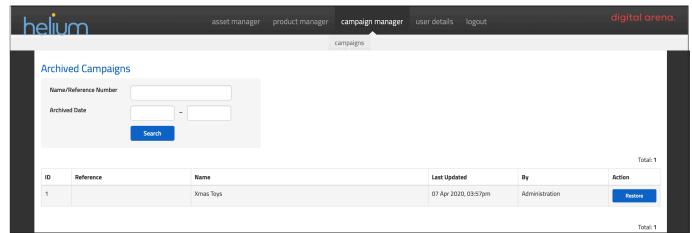
Viewing an archived campaign

- 1. From campaign manager top menu choose **campaigns**
- 2. Click View Archived
- 3. Enter a name or reference number, or a date range otherwise leave blank for a list of all archived campaigns.
- 4. Click Search

Restoring an archived campaign

- From campaign manager top menu choose campaigns Click View Archived
- 2. Click Search
- 3. Click **Restore** on the campaign you want to restore





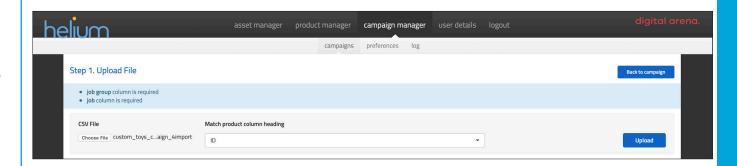
Initial Setup

Once a new campaign has been created - you can construct the Job Groups and Jobs and populate these jobs with product from a CSV file, rather than creating them manually.

Using Initial Setup - Step 1: Upload

- 1. From a newly created Campaign, click on **Initial Setup**
- Click 'Choose File' to select your prepared CSV. As a minimum it requires a Job Group and a Job column (see example Screenshot)
- 3. From the dropdown menu, select your match criteria, either ID or SKU.
- 4. When ready, select Upload





id	SKU	category	job group	job	Product Brand
25	6511346	Toys	Star Wars	Page 1	Lego Star Wars
24	6511348	Toys	Star Wars	Page 1	Lego Star Wars
23	6521485	Toys	Star Wars	Page 2	Lego Star Wars
12	6522590	Toys	Technic	Page 1	Lego Technic
11	6522911	Toys	Technic	Page 2	Lego Technic
10	6522912	Toys	Technic	Page 2	Lego Technic
9	65229144	Toys	Technic	Page 3	Lego Technic
8	6522915	Toys	Technic	Page 4	Lego Technic

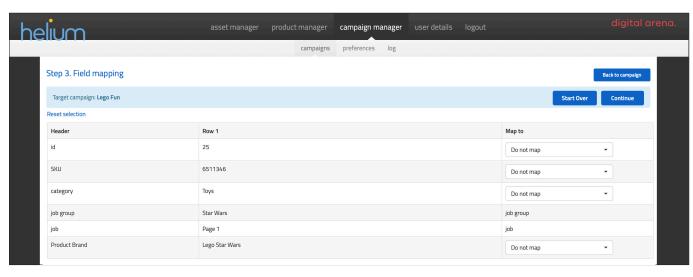
Using Initial Setup - Step 2: Content Checking

- The CSV file is checked for valid column values and will display a red or green notification, informing you whether you can proceed or not.
- Choose **Start Over** if you need to amend the CSV file, or **Continue** to process the file.

Using Initial Setup - Step 3: Field Mapping

- The field mapping allows you to select which value matches the corresponding value in the Campaign.
- If you are including job specific images in the Campaign, these can be added also. You can select **Start Over** and make your changes to the file - or select **Continue**, to load the file using the mappings as displayed.
- A notification window will appear, showing success or failure. You can select **Download Success Results** to download a CSV file with the details.
- 4. Select **Close** to remove the notification and select 'Back' to return to the Campaign window.



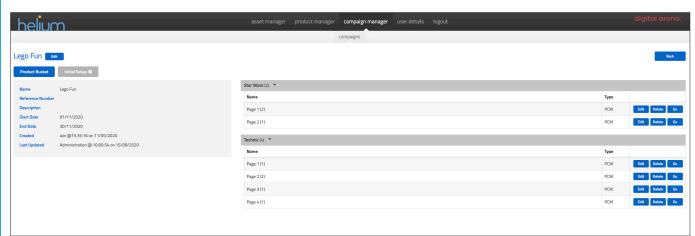


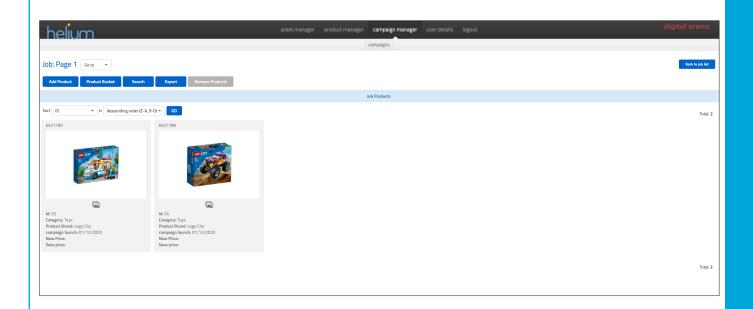


NOTE: Any values set to 'Do not map' will be ignored and won't be uploaded into the Campaign

Using Initial Setup - Results

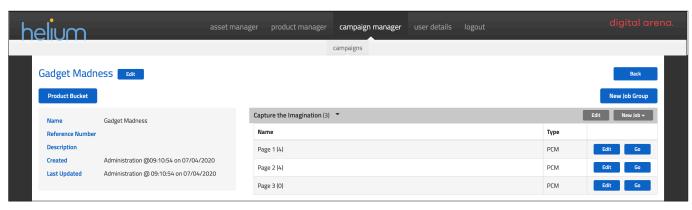
- Once Initial Setup is used, the button will be greyed out and will not function again, as the Campaign has been created.
- In this example, the Default Job Group has been renamed, and the Job Groups have been created along with their Jobs and product within those jobs. In addition, they have been populated with images - since the image reference was included in the CSV file.

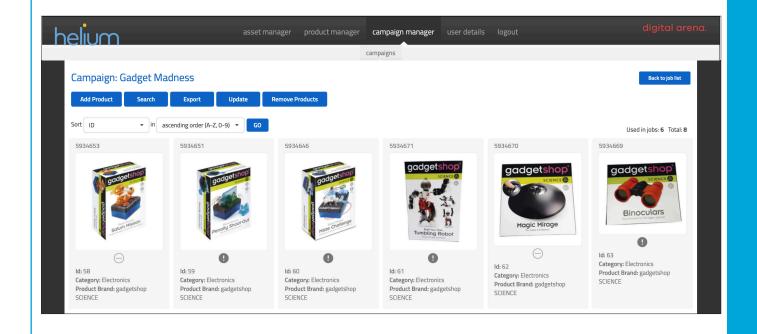




Adding products to a campaign

- 1. From the campaign manager top menu choose **campaigns**
- 2. Click **View** on the campaign you want to add product to.
- 3. Click Product Bucket



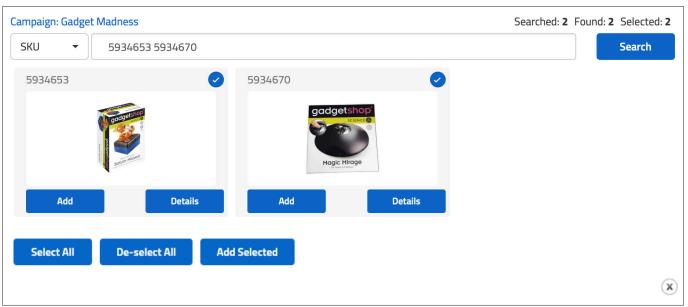


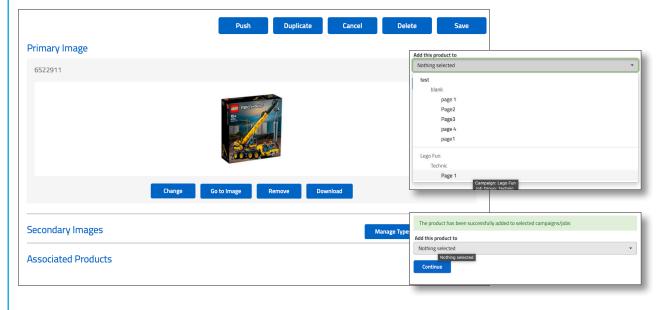
Adding products to a campaign (con't)

- 4. Click **Add Product**. Type the ID or SKU's in the field. (separate them with a space).
- 5. Click Search
- Select the products you require, by checking the round checkbox at the top of the product thumbnail.
 Click Add Selected or Select All then click Add Selected
- 7. Review your job products and use the collection tool (to remove a product if required
- 8. Click **Back To Job List**, to return to the job group window.

Alternative method of adding a product to a campaign

- 1. Select **Push** from a product details window
- 2. From the dropdown, select a campaign, Job Group and
 - Click outside the dropdown and click **Continue** to add the product to the selected job.

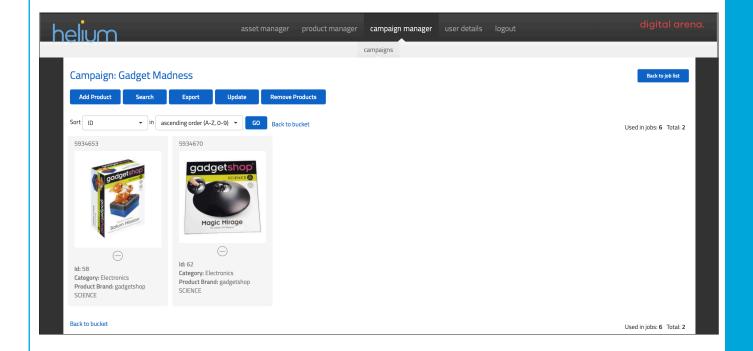






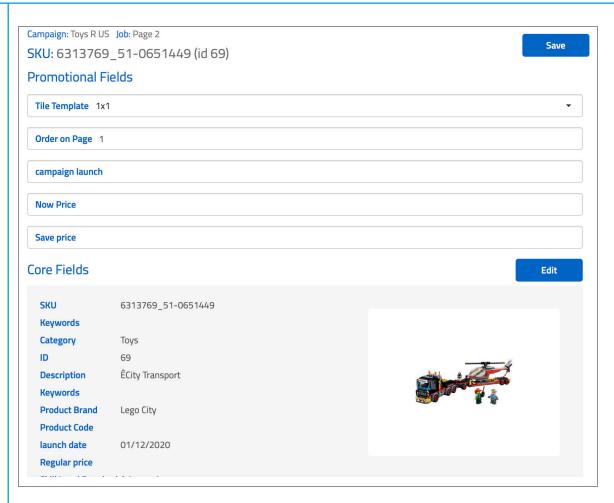
- 1. From the campaign manager top menu choose **campaigns**
- 2. Click **View** on the campaign you want to search
- 3. Select your Job Group, and click **Go** on the job you wish to search
- 4. Click **Search** from the function row
- 5. Enter the ID or SKU number(s) you wish to locate and click **Search**
- 6. The product(s) will be displayed and then can be sorted in various ways by the Sort dropdown (see inset)
- Click Back to bucket to return to the campaign bucket or select Back to job list to return to the Job Group

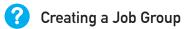




Viewing Product Information in a job or Campaign

- Clicking on a product image, will open the product information window.
- This shows at the top, a breadcrumb trail showing the current Campaign and Job that the product belongs to.
- Below are the Promotional Fields which can be edited directly. Click **Save** when done.
- •The Core Fields are shown below the Promotional Fields and can be accessed and edited by clicking the **Edit** button. This will take you to the product details page. Pressing the **Back** button will return you to the Job that you were in previously.

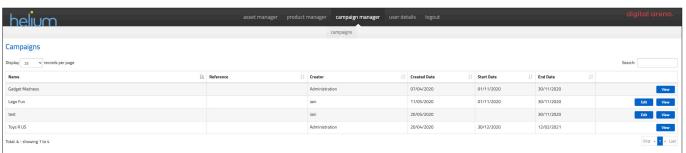




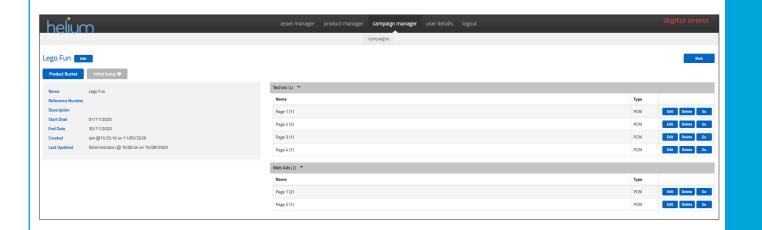
PURPOSE: A job group is an element of a campaign. A campaign may contain a catalogue, tickets, EDM and social media elements. These are considered job groups. Each will have products assigned to it.

Adding a job group to a campaign

- From the campaign manager top menu choose campaigns
- Review the list of existing campaigns, and click **View** on the campaign you want to add a job group to.
- Click New Job Group
- Enter a name for your job group. Click Save







Creating & deleting a Job

PURPOSE: A Job is a component of a Job Group.

For example pages of a catalogue, or elements of an EDM. Products are allocated to a Job.

Adding a job to a Job Group within a Campaign

- Click New Job. Choose New job.
- Enter a name.
- Choose the appropriate group from the dropdown menu
- Click Save when done.

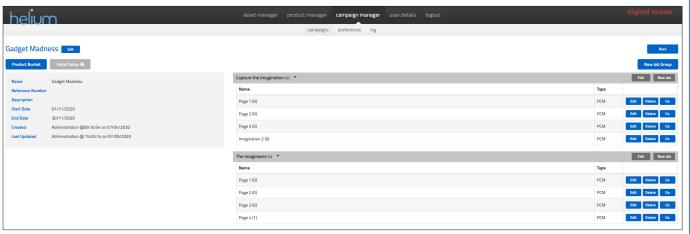
Deleting a job from a Job Group

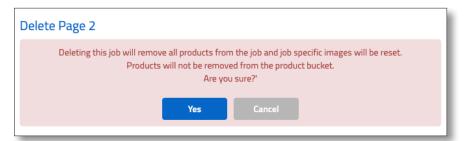
- Click **Delete** from the job you wish to delete.
- A warning is displayed confirming that the products will be removed and job specific images will be reset to their original settings

NOTE: Products are only removed from the Job, not the Product Bucket.

NOTE: Job names within a Campaign must be unique. Helium will alert you if a name is already in use.









Adding products to a job

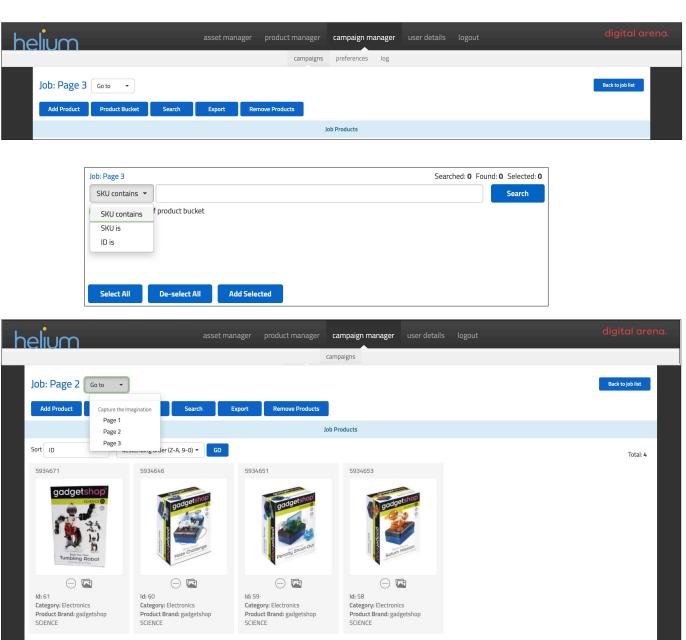
PURPOSE: Products can be added to a job in various ways, depending on the number of products, and the workflow guidelines applicable to you.

Adding products to a job

- From the campaign manager top menu choose campaians
- Review the list of existing campaigns, and click **View** on the campaign you want to work in..
- Click **Go** on the job you want to add products to.
- Click Add Product. Type the ID or SKU's in the field. (separate them with a space). Ensure "Search outside of product bucket' is checked
- 5. Click Search
- Select the products you require, by checking the round checkbox at the top of the product thumbnail. Click Add Selected or Select All then click Add Selected
- Review your job products and use the collection tool (-) to remove a product if required
- Click Back To Job List, to return to the job group window.
- The **Product Bucket** button toggles you between the products in the job and all the products in the Campaign.

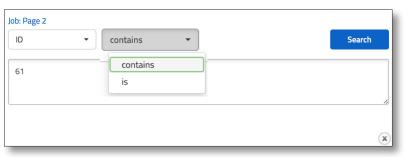


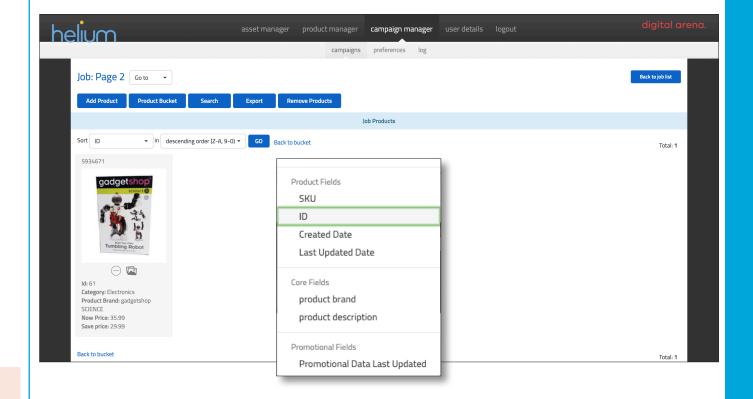
Campaign using the 'Go to' dropdown menu



Searching products in a job

- 1. From the campaign manager top menu choose **campaigns**
- 2. Click **View** on the campaign you want to search
- 3. Select your Job Group, and click **Go** on the job you wish to search
- 4. Click **Search** from the function row
- Enter the ID or SKU number(s) you wish to locate and click Search. (You can choose 'is' or 'contains' for your search for SKU)
- 6. The product(s) will be displayed and then can be sorted in various ways by the Sort dropdown (see inset)
- Press GO to execute the sort.





CAUTION: The Search function in a job - only searches for products used in that job. Ensure you are in the correct job or search from the Campaign instead.

Updating promotional data with a csv file

Step 1: Upload

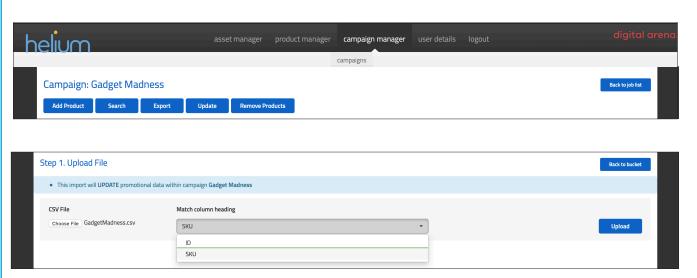
- 1. From the campaign manager top menu choose **campaigns**
- Review the list of existing campaigns, and click View on the campaign you wish to update.
- 3. Click Product Bucket
- 4. Click **Update** from the function row at the top of the page Click **choose file** and select your prepared csv file.
- Select SKU or ID to match the column headings in your csv file
- 6. Click **Upload**

Step 2: Content Checking

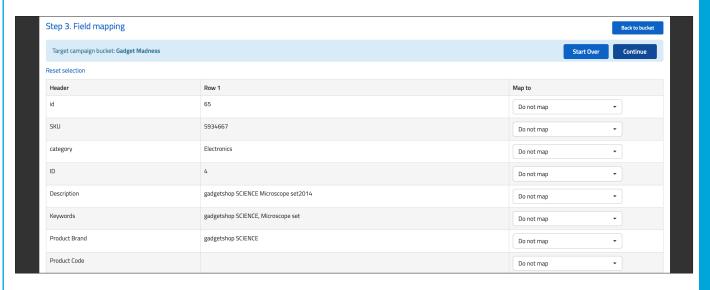
- The uploaded file will be checked, and any errors or relevant information will be highlighted. For example, non-existing products will be listed. These entries are ignored.
- click Start Over to cancel and amend your file, or click Continue to go to step 3.

Step 3: Field Mapping

- Ensure, the cells you want to update are mapped to the correct field in Product Manager. Fields that are marked a 'Do not map' are not updated
- Click Continue
- A message will indicate the upload is in progress. When completed, the message will confirm the upload is complete, showing the number of rows processed and success and failed entries.
- 3. You can download a summary csv of the file products updated using 'DOWNLOAD SUCCESS RESULTS' otherwise, those that were not uploaded can be accessed using 'DOWNLOAD FAILED RESULTS'
- 4. Click Close to exit the update process.









job specific images

PURPOSE: Job specific images is an important part of customising product in a job.

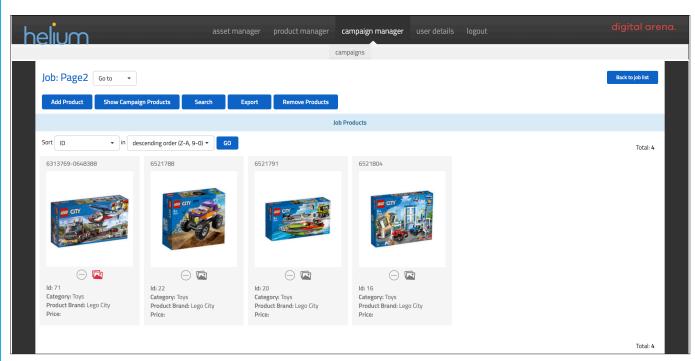
> It involves changing the assets assigned with a product, specifically for a particular job.

The changes are specific only to that job, and are not replicated in Product Manager or any other job

Manage images is only accessible from a job. The Manage image icon looks like this If a product has image changes it will be red.

Step 1: Selecting the product

- From campaign manager top menu choose **campaigns**
- Review the list of existing campaigns, and click **View** on the campaign you want to work in..
- Click **Go** on the job you want to access.
- Identify the product and click the Manage image icon



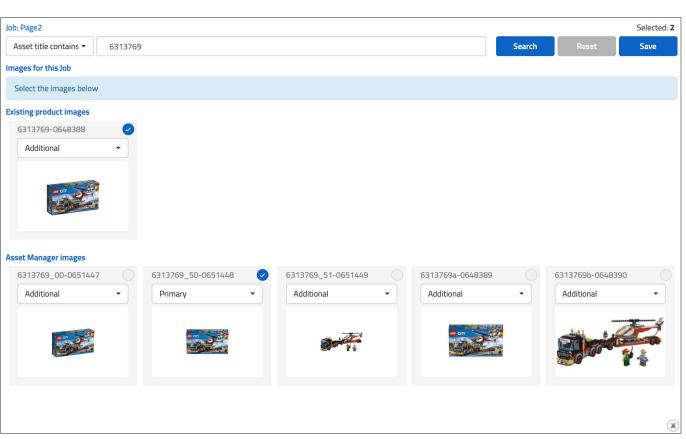


job specific images (con't)

• The Job specific image icon takes you to a window where all available assets are displayed. From here, you can change which assets are primary, secondary or additional, and which ones will be included in this particular job.

Step 2: Making changes

- Depending on the settings, Asset Manager images may not be visible.
- From the dropdown menus, you can make changes to each asset - assigning them as Primary, Secondary, Logo or Web Banner
- 2. Once you have made your changes, ensure the assets to be included, have the round checkbox ticked.
- 3. Then click **Save** to save your changes and update the products for this job.
- To undo the changes and revert the product assets back to their original settings, click the **Reset** button



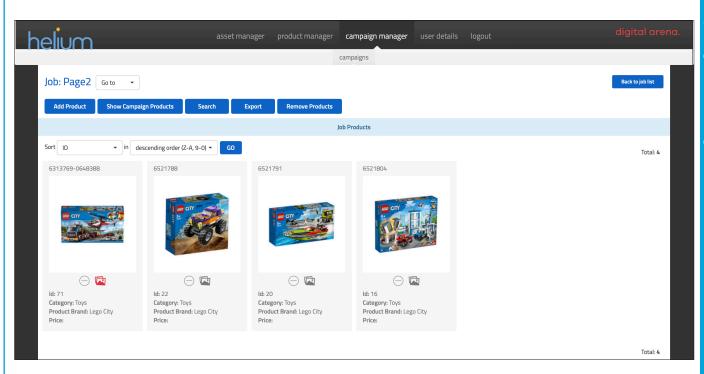


job specific images (con't)

• Once saved, you will be returned to the job page. Products that have been altered - will now have a red manage image icon This indicates that the assets associated with the product, have been changed and differ from the Product Manager information.

Step 3: Reviewing changes

- Check that all your changes are correct and have been
- If desired, click on the Manage image icon and confirm.
- Click Back to job list to return to the Campaign.





iob specific data

PURPOSE: Job specific data is an important part of customising product in a job. It involves changing specific data fields, for a product, within a specific job.

Job specific promotional fields are defined in System Preferences

The changes made are specific to that job only. The job specific data icon looks like this If a product has job specific data - the icon will be red

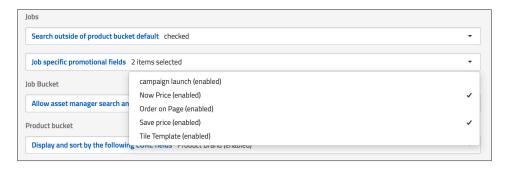
Step 1: Selecting the product

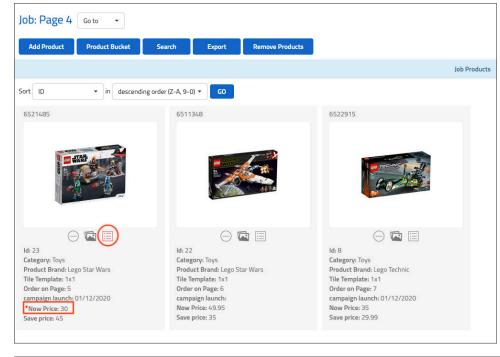
- From campaign manager top menu choose campaigns
- Review the list of existing campaigns, and click **View** on the campaign you want to work in
- 3. Click **Go** on the job you want to access
- Clicking on the job specific data icon, takes you to a window where the job specific fields are displayed in the left column and the master (default) promotional data is in the right column.

Step 2: Making changes

- Enter values in the job specific data fields as appropriate
- When finished, click Save The job specific data icon will now be Red, indicating the product now has job specific data

NOTE: The job specific data - only applies to a job, within a Campaign. The original values, in the promotional fields for the product - remain.





WARING: Any empty/unselected job specific data will be IGNORED. The system will use master data instead.					
Job Specific Data		Master Promotional Data			
Now Price 30.00	Reset	Now Price 35.00			
Save price	Reset	Save price 45.00			

Removing products from a job

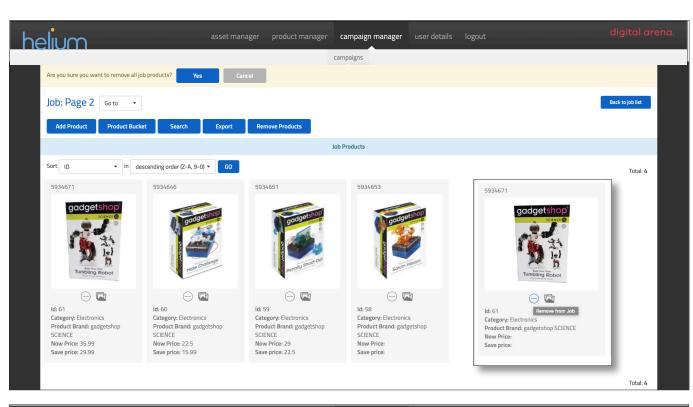
- 1. From the campaign manager top menu choose **campaigns**
- Review the list of existing campaigns, and click View on the campaign you wish to update.
- 3. Click **Go** on your selected job, from the appropriate job group.
 - Click the collection tool \bigcirc to remove an individual product or products from the job [see insert]

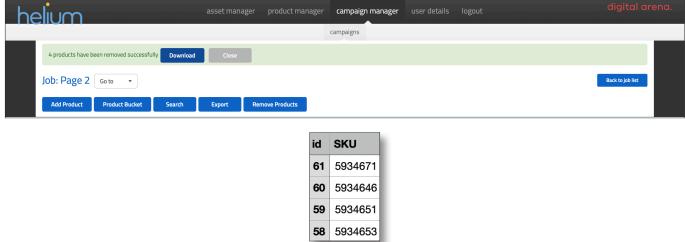
To remove all products from a job

 Click Remove Products from the function row at the top of the page. You will see a warning at the top of the page whether you are sure you want to remove all job products. Click Yes or Cancel

 You will get a confirmation notification and the option to download a CSV record of the products removed by selecting **Download**. Select **Close** to remove the notification.

NOTE: You need to remove a product from a job before you can remove it from the Product Bucket - and therefore the Campaign.





removing products from a campaign

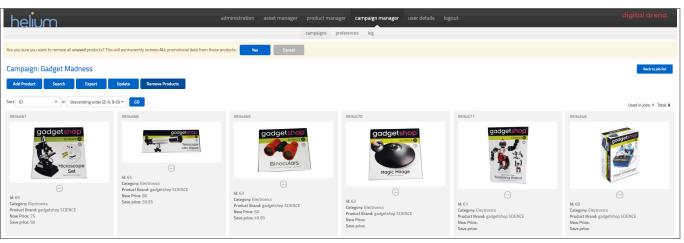
Removing products from a Campaign

- From the campaign manager top menu choose **campaigns**
- Review the list of existing campaigns, and click **View** on the campaign you wish to update.
- From the left hand side, click **Product Bucket**
- Click the collection tool (-) to remove an individual product or products from the campaign

To remove all products from a campaign

- 5. Click **Remove Products** from the function row at the top of the page. You will see a warning at the top of the page whether you are sure you want to remove all unused products? This will permanently remove ALL promotional data for these products. Click **Yes** or **Cancel**
- 6. You will get a confirmation notification and the option to download a CSV record of the products removed. Click close to remove the notification.

The Exclamation icon
indicates that the product is in use in one or more jobs. Hover over the icon to see which jobs it is used in [see insert].

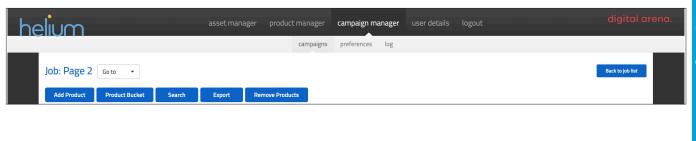


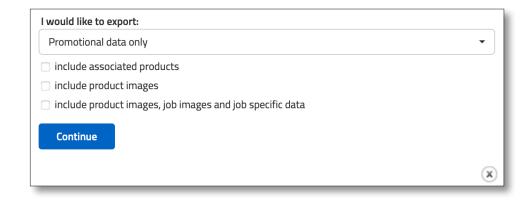


NOTE: This function only removes products from a campaign that have not been used.

Exporting a job

- 1. From the campaign manager top menu choose **campaigns**
- Review the list of existing campaigns, and click **View** on the campaign you wish to export.
- Click Go on your selected job, from the appropriate job group.
- 4. Click **Export** from the function row at the top of the page
- 5. A floating window will appear. Choose from the dropdown menu, between 'promotional data only' and 'promotional and core data'. You can choose to 'include associated products' and/or 'include product images' and 'include product images and job images and job specific data'
- 6. Click **Continue**. A csv file will be created and downloaded.

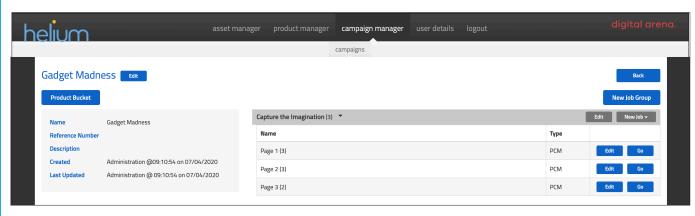


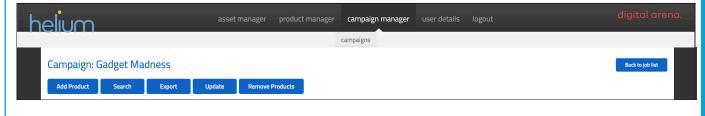


ic	b	SKU	category	ID	Description	Keywords	Product Brand	Product Code	img_primary
6	31	5934671	Electronics	8	gadgetshop SCIENCE Tumbling Robot	gadgetshop SCIENCE,Tumbling Robot	gadgetshop SCIENCE		5934671
6	0	5934646	Electronics	1	gadgetshop SCIENCE Maze Challenge		gadgetshop SCIENCE		5934646
5	9	5934651	Electronics	2	gadgetshop SCIENCE Penalty Shoot Out2014		gadgetshop SCIENCE		5934651
5	8	5934653	Electronics	3	gadgetshop SCIENCE Saturn Mission2014		gadgetshop SCIENCE		5934653

Exporting a campaign

- 1. From the campaign manager top menu choose **campaigns**
- 2. Review the list of existing campaigns, and click **View** on the campaign you wish to export.
- 3. Click on the Product Bucket
- 4. Choose **Export** from the function row at the top of the page
- 5. A floating window will appear. Choose from the dropdown menu, between 'promotional data only' and 'promotional and core data'. You can choose to 'include associated products' and/or 'include product images'
- 6. Click **Continue**. A csv file will be created and downloaded







id	SKU	category	ID	Description	Keywords	Product Brand	img_primary
65	5934667	Electronics	4	gadgetshop SCIENCE Microscope set2014	gadgetshop SCIENCE, Microscope set	gadgetshop SCIENCE	5934667
64	5934668	Electronics	5	gadgetshop SCIENCE Telescope with Tripod		gadgetshop SCIENCE	5934668
63	5934669	Electronics	6	gadgetshop SCIENCE Binoculars 4x32mm	gadgetshop SCIENCE, Binoculars, 4x32mm	gadgetshop SCIENCE	5934669
61	5934671	Electronics	8	gadgetshop SCIENCE Tumbling Robot	gadgetshop SCIENCE,Tumbling Robot	gadgetshop SCIENCE	5934671
60	5934646	Electronics	1	gadgetshop SCIENCE Maze Challenge		gadgetshop SCIENCE	5934646
59	5934651	Electronics	2	gadgetshop SCIENCE Penalty Shoot Out2014		gadgetshop SCIENCE	5934651
62	5934670	Electronics	7	gadgetshop SCIENCE Magic Illusion	gadgetshop SCIENCE, Magic Illusion	gadgetshop SCIENCE	5934670
58	5934653	Electronics	3	gadgetshop SCIENCE Saturn Mission2014		gadgetshop SCIENCE	5934653