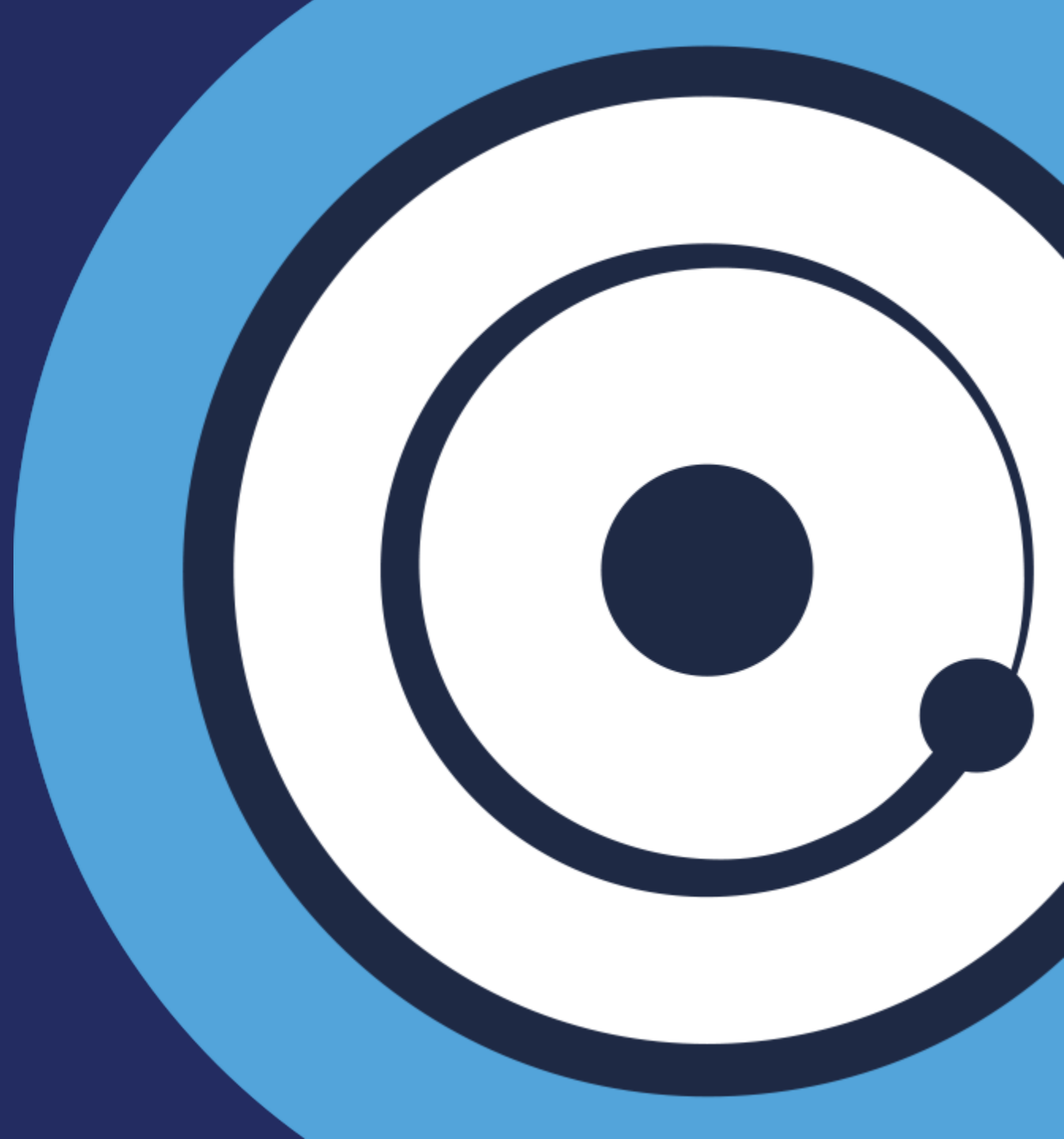




Apteco

Building campaigns with Apteco

Your step-by-step guide
to broadcasting and
orchestrating automated
journeys in Apteco Orbit™





Target the perfect audience

Orchestrate the journey



Personalise the experience



Monitor the results

In this guide you'll discover:

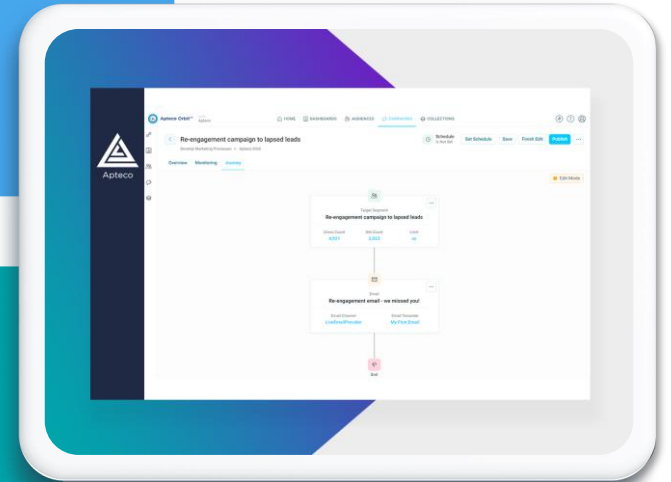
- What is the new automated campaign building functionality in the Orbit platform?
- When should you use it?



Plus, visit apteco.com for video demos, links to practical help guides and more...

10 steps to creating successful campaigns in Apteco Orbit, including:

- How to select your perfect audience
- How to create and broadcast a campaign
- How to add audiences and apply limits
- How to add personalisation
- How to save, edit and publish



Please note - users must license the Broadcaster bundle and above to access the campaigns area in Apteco Orbit. [Learn more about our pricing bundles.](#)

Orchestrate single-step automated campaigns in Apteco Orbit

Connect your data and channels, extract actionable insights to build and refine your ideal target audience, then personalise your messages and automate and monitor your campaigns – all from one platform.

Target

Extract actionable insights from your data and take your campaigns to the next level



Personalise

Personalise content fields to ensure you are speaking directly to each customer



Broadcast

Check, schedule and export your data directly to your preferred channels



Monitor

Monitor your campaign outcomes to act fast and deliver more positive outcomes



With Apteco Orbit you can schedule and automate all your regular campaigns:



**Direct
mailings**



Newsletters



**Re-engagement
emails**



**Download our new
eGuide '10 Automated
campaigns you should
use in your marketing
strategy' for more
advice on campaigns**

DOWNLOAD



**Welcome
emails**



Promo emails



**Rewards /
loyalty emails**



Step #1

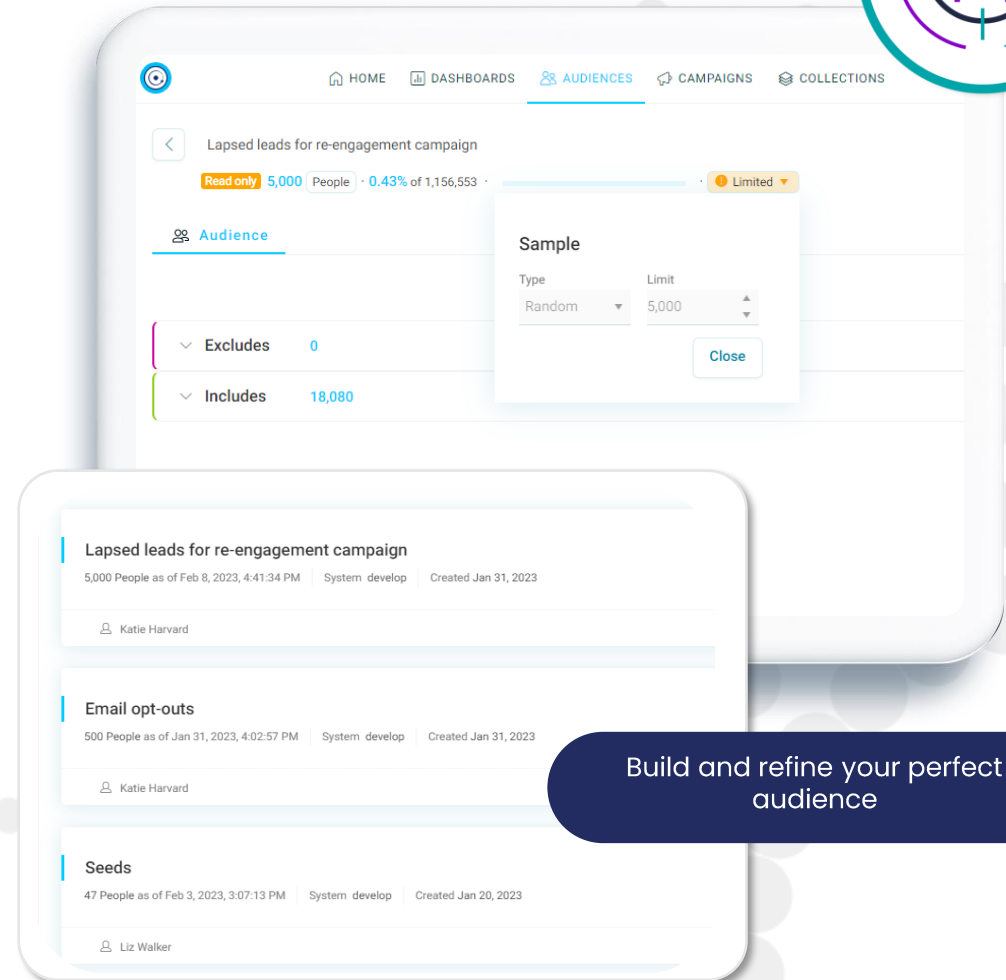
Define your perfect audience

It all starts with your data

Successful marketing campaigns start by defining your ideal target audience from your data. Apteco Orbit makes it easy to create targeted segments and action your data insights immediately in your campaigns – driving positive outcomes.

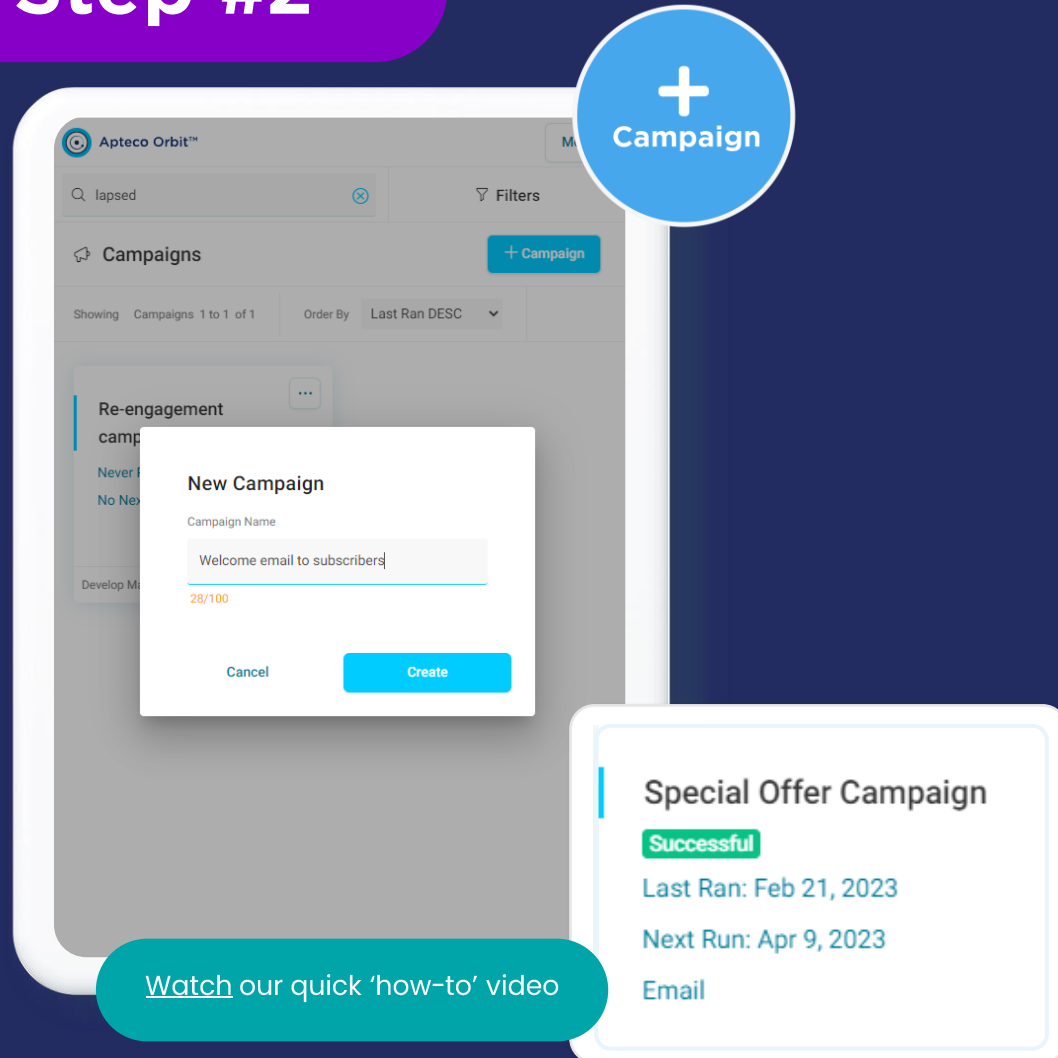
Start your campaign by creating segments directly from dashboard visualisations. Analyse your data in Apteco Orbit dashboards, and then use your dashboard insights to create and target your ideal audience.

Or create a new list by segmenting and building your list in the Apteco Orbit audiences tool by applying inclusions and exclusions.



Build and refine your perfect audience

Step #2



Add a new campaign

Creating a new campaign couldn't be easier!

Click on the '+ campaign' button, give your new campaign a name and that's it!

Your campaign will open in 'edit mode', which means that you are in control of the campaign and no one else can make any changes while you are editing it.

Your new campaign will then be added to the 'campaign dashboard', where you can use search filters to easily locate it.

The campaign dashboard will also display important details like the last run date and any error or success messages.

Step #3

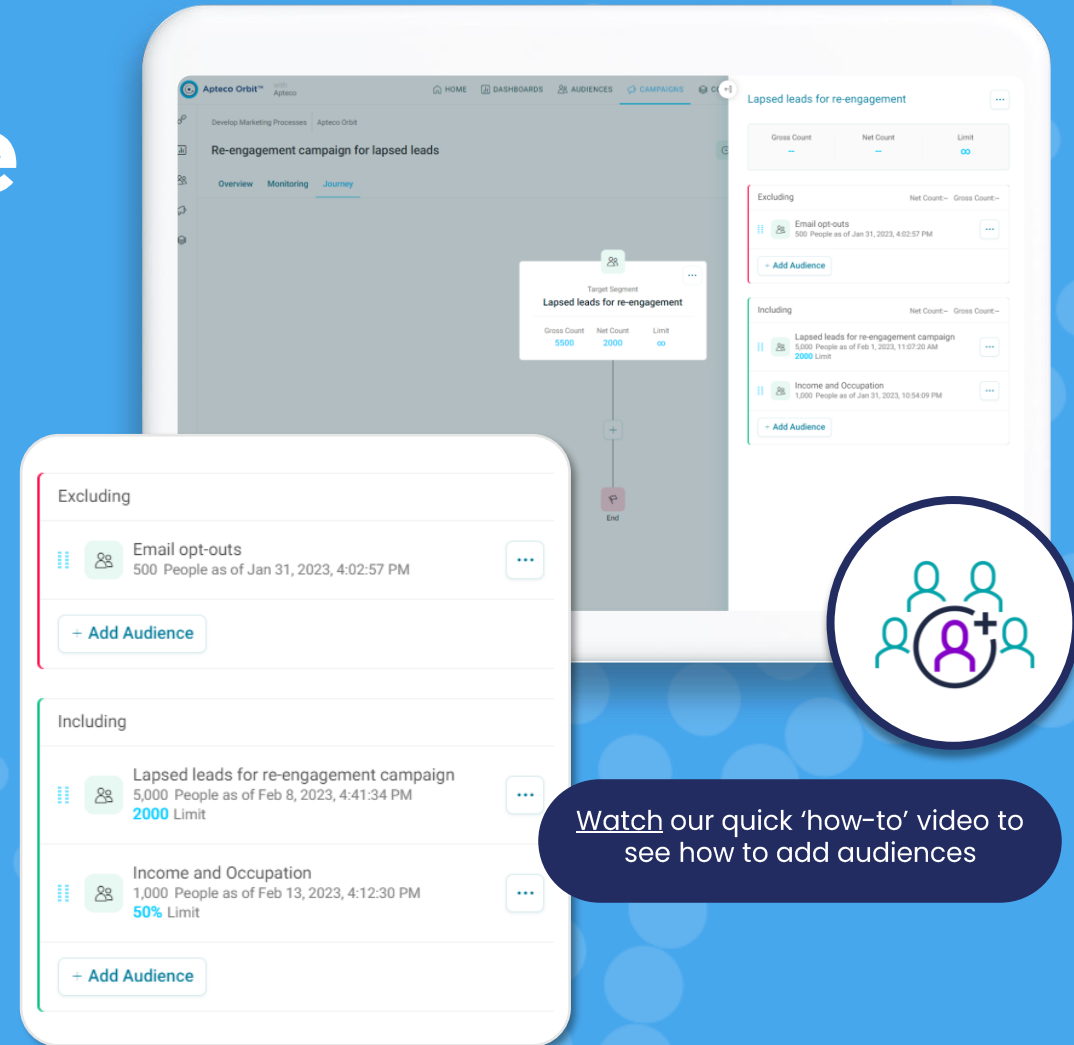
Adding your audience

Easily add an audience list, multiple audiences or exclusions to your campaign

Adding audiences to your campaign is simple. Just click 'add audience' and the editing panel on the left-hand side will open. You can then select multiple audiences with the include and exclude functionality.

The 'including' section will automatically de-dupe (remove duplicates) and you can conveniently move your audiences up and down the list, to establish which audience segment has priority.

Both gross and net counts are updated and displayed at audience level, segment level and journey builder summary level.



Step #4

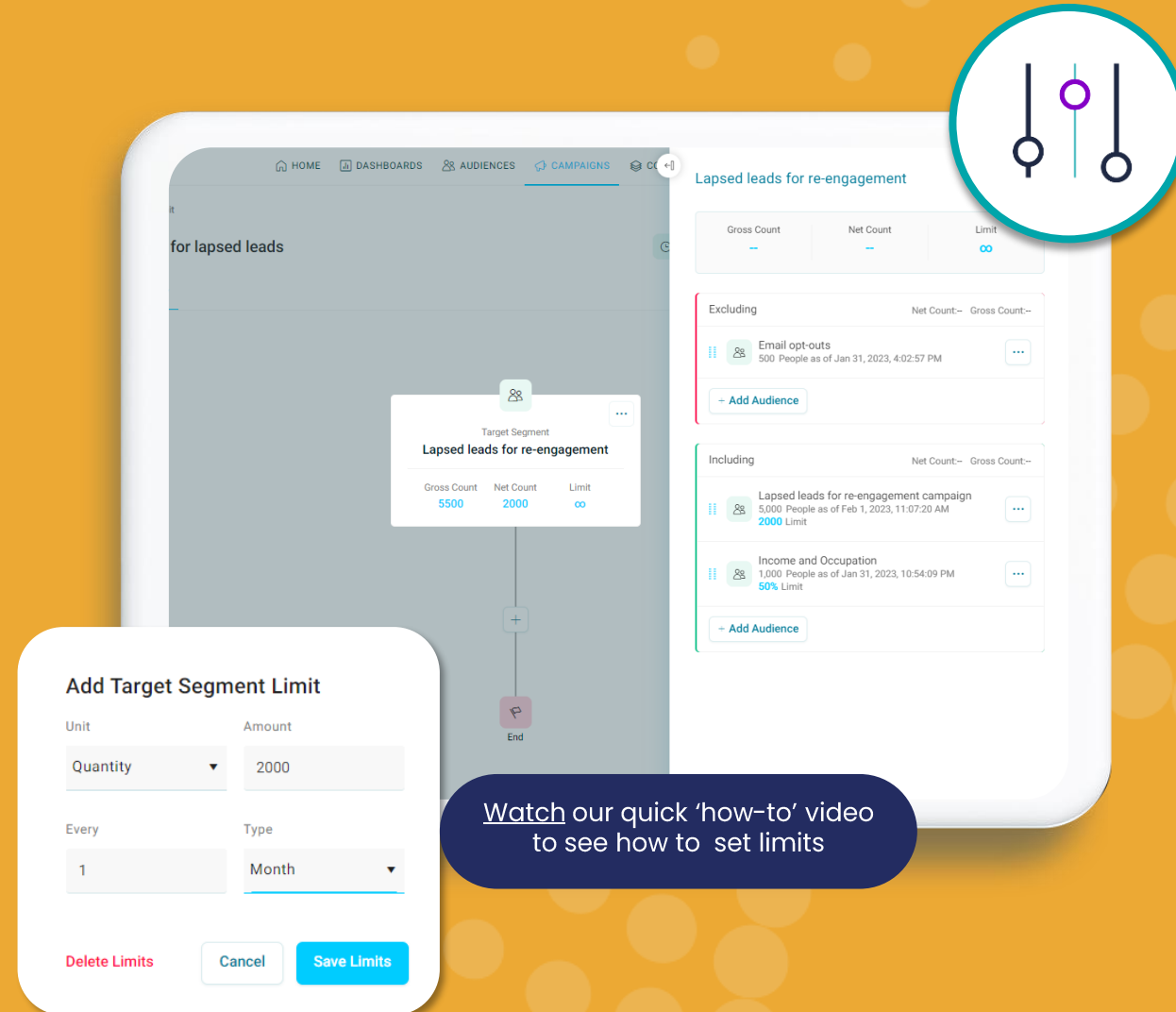
Set audience limits

Set quantity and percentage limits by segment or campaign

Budget and resource constraints mean that marketers often need the ability to apply limits to campaign volumes.

With Apteco Orbit quantity limits can easily be set for the whole campaign, or at audience segment level and can also be applied per run for recurring campaigns that are scheduled per day, week, month and so on.

Percentage limits can also be applied in a similar way using a random sample of the data. This is particularly beneficial where the exact quantity is not known, but where you wish to select a subset of the audience for testing. Percentage limits can be applied per run but are not available for recurring schedules.



The image displays the Apteco Orbit user interface for setting audience limits. A central panel titled "Lapsed leads for re-engagement" shows a table with columns for Gross Count (5500), Net Count (2000), and Limit (∞). Below this, a "Target Segment" dropdown is set to "Lapsed leads for re-engagement". To the right, a sidebar titled "Lapsed leads for re-engagement" lists audience segments with their respective counts and limits. A modal window titled "Add Target Segment Limit" is open, showing fields for Unit (Quantity), Amount (2000), Every (1), and Type (Month). A circular icon with three vertical lines and a purple circle is in the top right corner. A dark blue button at the bottom right contains the text "Watch our quick 'how-to' video to see how to set limits".

Excluding	Net Count--	Gross Count--
Email opt-outs 500 People as of Jan 31, 2023, 4:02:57 PM		

Including	Net Count--	Gross Count--
Lapsed leads for re-engagement campaign 5,000 People as of Feb 1, 2023, 11:07:20 AM 2000 Limit		
Income and Occupation 1,000 People as of Jan 31, 2023, 10:54:09 PM 50% Limit		

Unit	Amount
Quantity	2000

Every	Type
1	Month

Delete Limits Cancel Save Limits

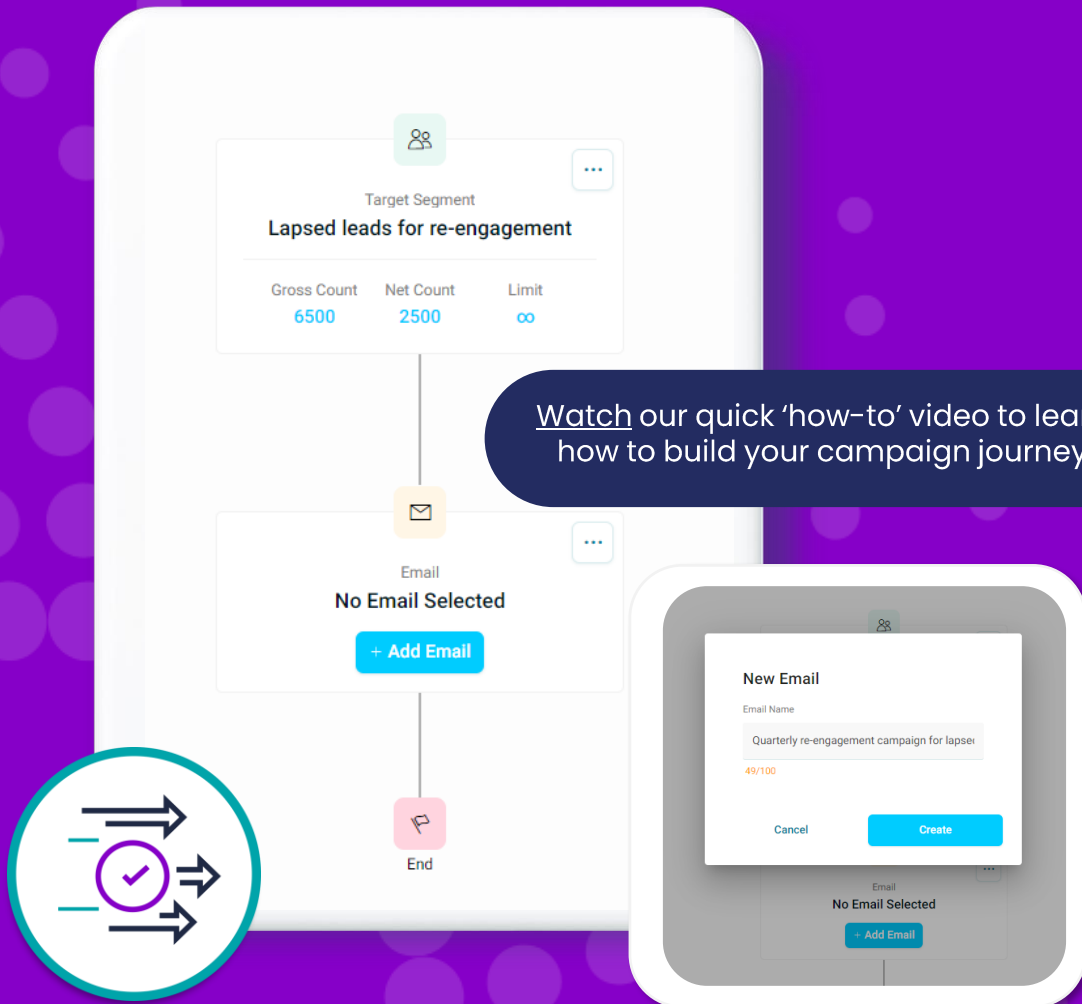
Watch our quick 'how-to' video to see how to set limits

Step #5

Orchestrate your journey

Add the journey step of your campaign for both email and offline fulfilment

[Watch](#) our quick 'how-to' video to learn how to build your campaign journey



Once you have added your audiences to your campaign, you can then add the journey step. Here you will be prompted to select the communication output channel. Currently you have a choice of FTP and file options to handle your traditional fulfillment needs, such as sending data to your call centre or mailing house. Alternatively, you can trigger an email send.

You will then be asked to name your email, FTP or file. The left-hand editing panel will then open, so that you can add the details of your ESP (email service provider), message name and list name, in the case of an email; FTP channel and file name, for FTP and file channel and file name for uploading files.

Files can be output in many standard formats with a choice of delimiters and alpha and numeric encoders, to ensure your data is supplied exactly as you need it.

Step #6



Adding personalisation

Let's make it personal

It's more important than ever for marketers to ensure that their communications and interactions with customers are personal and relevant. In the editing panel of the journey step, you can add text fields and variables to personalise your content.

Add text fields such as voucher or mailing codes, job or campaign numbers and codes or flags to every record in your data output. Alternatively add variables from your database that are unique to each customer record, such as customer segment, model score, date of birth, last product purchased, date of last purchase or drive time, to ensure that every customer journey is unique and relevant to each individual customer.

Watch our quick 'how-to' video to see how to add personalisation

Target Segment

Gross Count	Net Count	Limit
6500	2500	∞

Quarterly re-engagement email to lapsed leads

Email Channel: Email - Demo | Email Template: Test Message 3

Add Content Field

Field Type: Variable

Field Value: Date of Last Communication

Field Name: Last activity date

Cancel | Add

Step #7

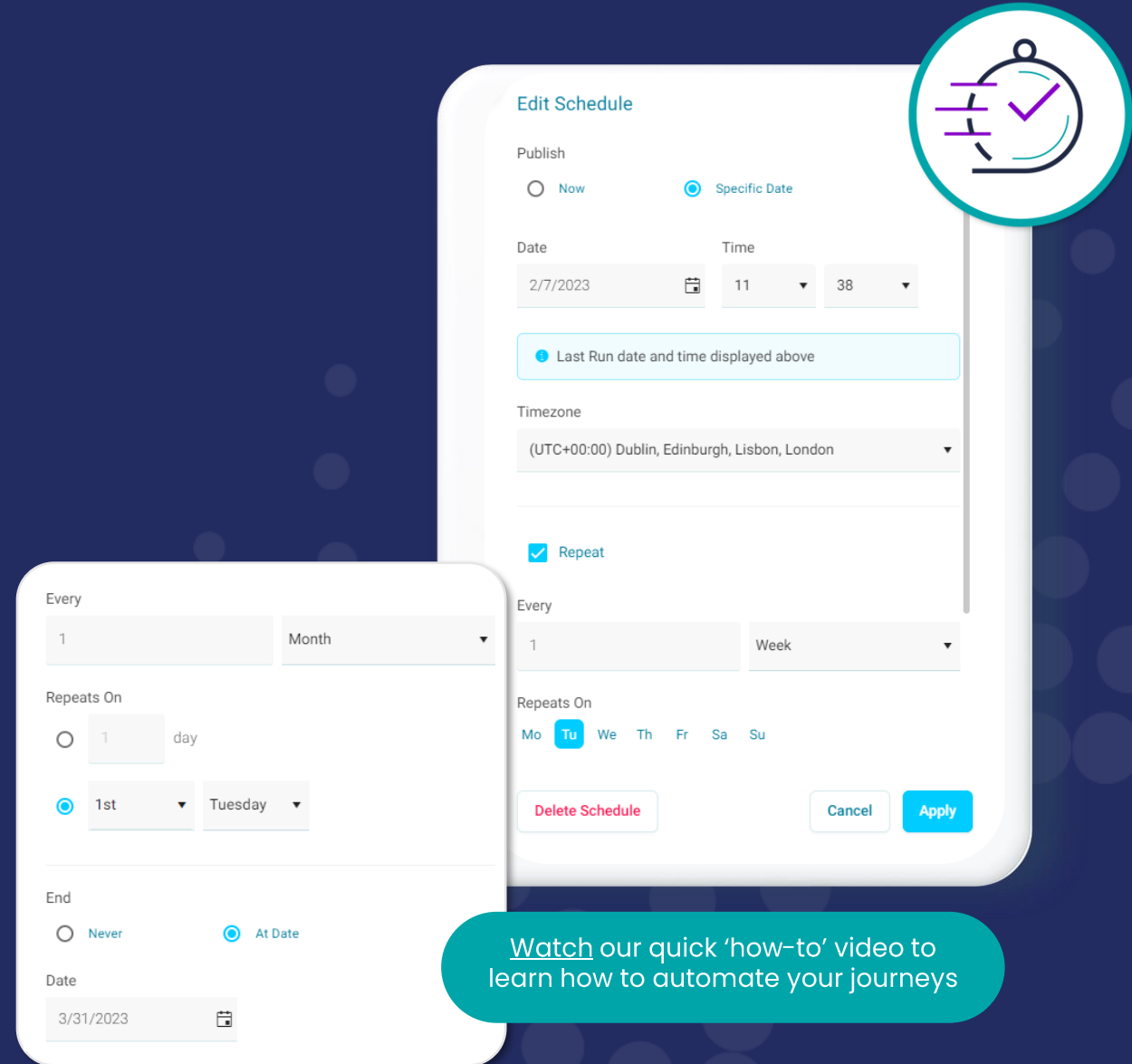

Streamline your journeys

Set your campaign schedule

Your campaign can be conveniently scheduled to run at a set date, time, and time zone, allowing you to tend to other valuable tasks while your campaign runs in the background.

To set a campaign schedule simply click 'set schedule' at the top of the journey. Here you will be able to schedule a one off send – to go now or at a date in the future, or you can automate your email with a recurring schedule.

In Apteco Orbit you can schedule your campaigns to run on a daily, weekly, monthly, quarterly or even yearly basis. And you can also set your campaign to run at, or from, a required date and time and in a specific time zone, with your preferred recurrence pattern until an optional end date.



Edit Schedule

Publish
☐ Now ☒ Specific Date

Date: 2/7/2023 Time: 11:38

☒ Last Run date and time displayed above

Timezone
(UTC+00:00) Dublin, Edinburgh, Lisbon, London

☒ Repeat

Every: 1 Month

Repeats On:
☐ 1 day
☒ 1st Tuesday

End:
☐ Never ☒ At Date

Date: 3/31/2023

Repeats On:
Mo **Tu** We Th Fr Sa Su

[Delete Schedule](#) [Cancel](#) [Apply](#)

Watch our quick 'how-to' video to learn how to automate your journeys

Step #8

View, edit, save and publish

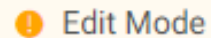
Keep your campaigns secure while editing and publish when it's perfect!

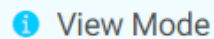
Apteco Orbit offers you four modes: view, edit, save and publish. While in 'view' – no changes can be made to your campaign journey. Click on 'edit' to make changes to your campaign. While the campaign is in 'edit' mode, no one else can make any changes to it.

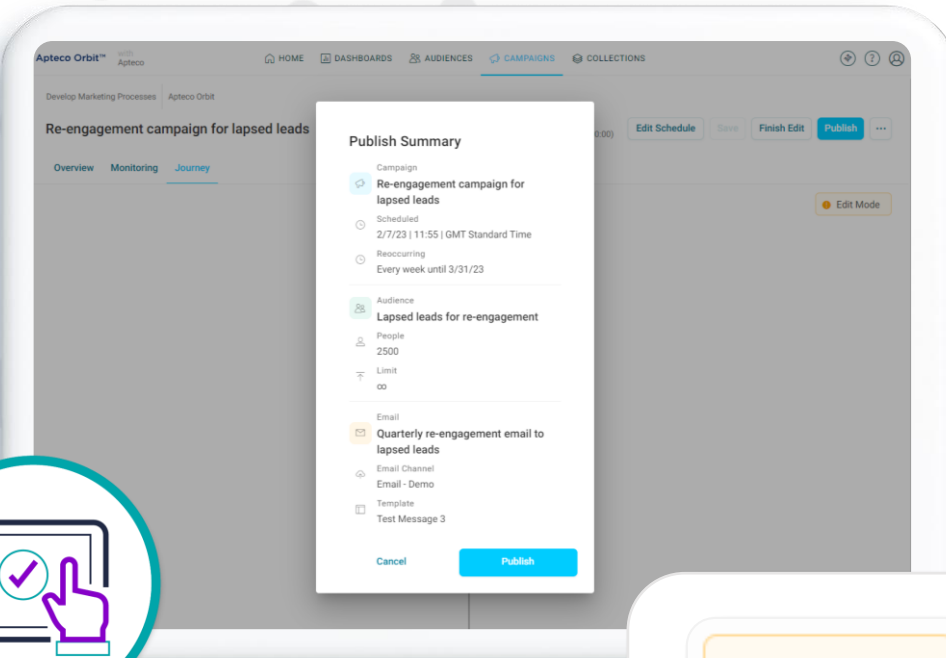
You can 'finish editing' or 'save' your changes at any stage of the campaign. The save function will save your changes and allow you to continue editing, whereas the finish editing function saves your changes and places the campaign back in view mode.

Once your campaign is complete, and you are happy with how it is set up, click 'publish'. This will make your campaign live, so that it can run to the set schedule.

Secure your campaigns while you edit them

 Edit Mode

 View Mode



Step #9

Preview and test, before you send

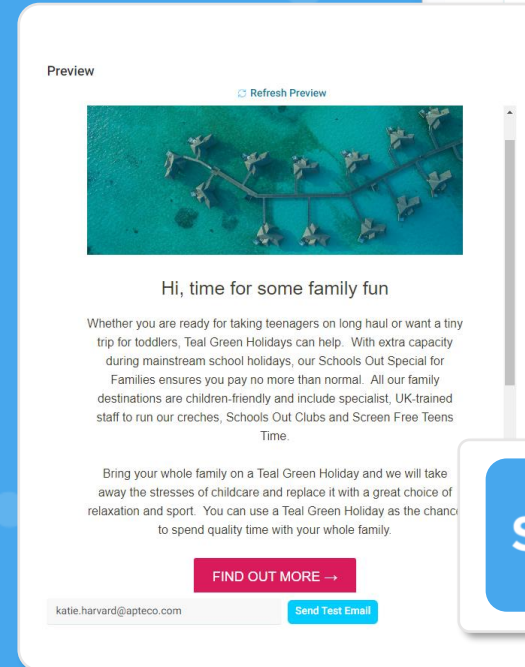
Preview and send to me

You've built a winning campaign journey, added your carefully selected audiences and applied personalisation to ensure your communications are relevant.

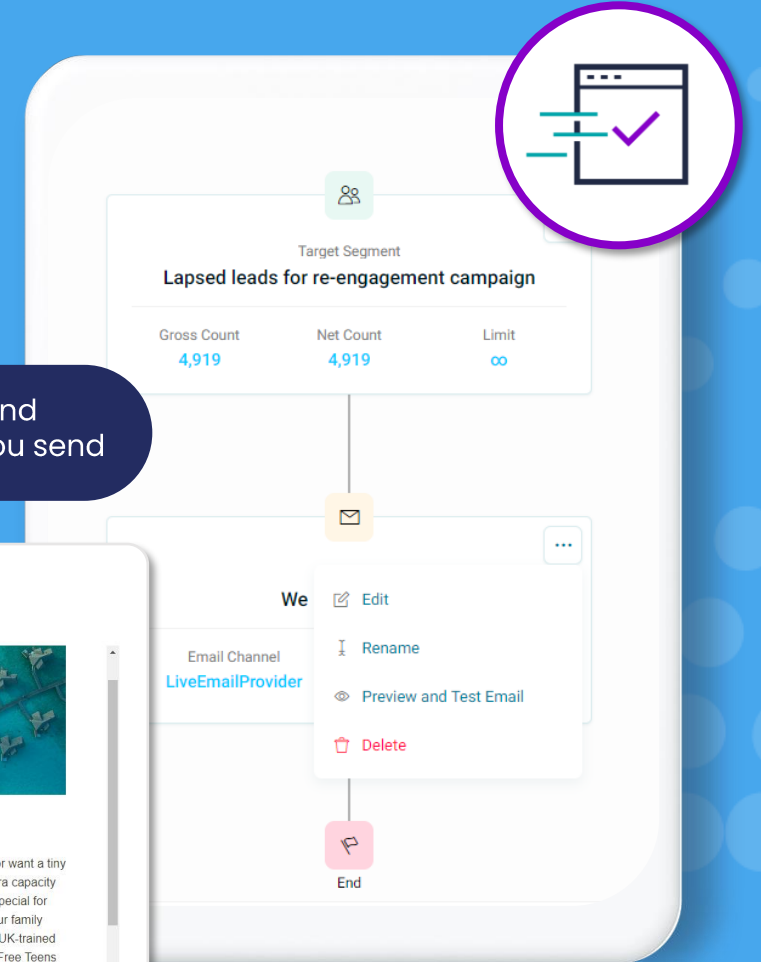
Now you are ready to send, and you want to feel confident your audience will receive the right message based on your settings.

That's where our preview and send-to-me functionality comes in. Preview your email and then click on 'send test email' to send your email directly to your inbox to double check any personalisation and make sure you are ready to publish your campaign.

Check the content and personalisation before you send



Send test email



Step #10

Monitoring your campaigns

Monitor campaign performance as it happens

Once your campaign is running, you'll want to start monitoring its performance to ensure you are reaching your goals. With Apteco Orbit you are able to track and monitor up-to-the-minute insights as they come in from your ESP. The campaign overview tab displays important tracking information including open and click through rates, as well as a calendar view and visualisations showing costs and channels.

You can also keep an eye on the campaign status in the 'monitoring' tab. This details the running steps of your campaign and displays any success or error messages.



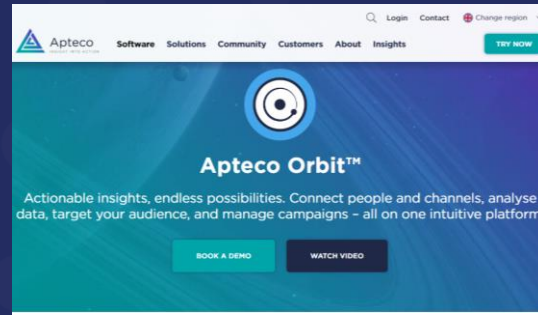
Monitor campaign status and performance as it happens

Find out more



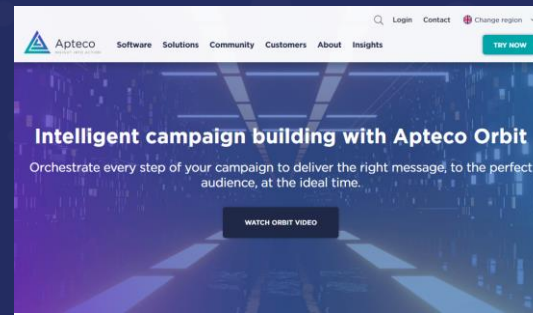
Turn insight into action – watch our Orbit platform video now

WATCH →



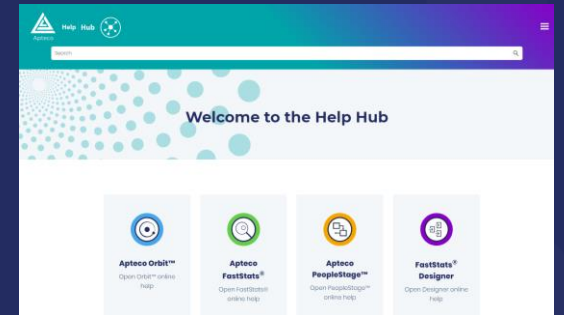
Watch videos, sign up for a free trial or just read more on our website

EXPLORE →



Learn more about campaigning in the Apteco Orbit platform

DISCOVER →



Visit our Help Hub for practical step-by-step help for all Apteco software

LEARN MORE →



Apteco

INSIGHT INTO ACTION

[apteco.com](https://www.apteco.com)