MARKOMI

Marketing Automation Tool

- User's Guide
- Version: 2.0

Markomi
BUILD. BRAND. GO TO MARKET.

Giving Shape to Ideas

Table of contents

What is Markomi?

Markomi is a multi-channel marketing tool. It allows users to quickly and effectively address customers from different business sectors using a variety of campaign templates. The templates consist mostly of a mix of e-mail marketing, landing pages, text messages or print files such as flyers. The exact make-up of each template is determined by the campaign type itself. You can edit text and insert a custom logo in all campaign templates. In many templates (so-called 'White Label' campaigns), it is also possible to change the colors and pictures.

As a web application, Markomi does not require you to maintain any complex IT infrastructure. With only little investment in time and resources, Markomi customers can create and manage complex cross-media campaigns.

Purpose of this guide

This document is an introduction to Markomi: First, you will learn how to register with Markomi, subscribe credits and navigate through the tool. Then we will show you how to create a campaign using the templates, including workflows, contacts and timing. Finally, we will guide you on how to administrate campaigns and how to retrieve their statistics.

In addition to this user's guide, you can find further information on the Markomi website and in our "Markomi How To" videos online.

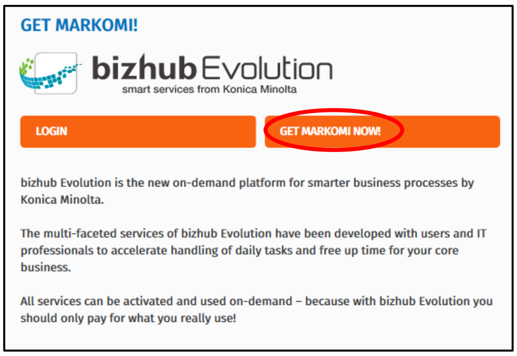
How to get Markomi

Create a bizhub Evolution account

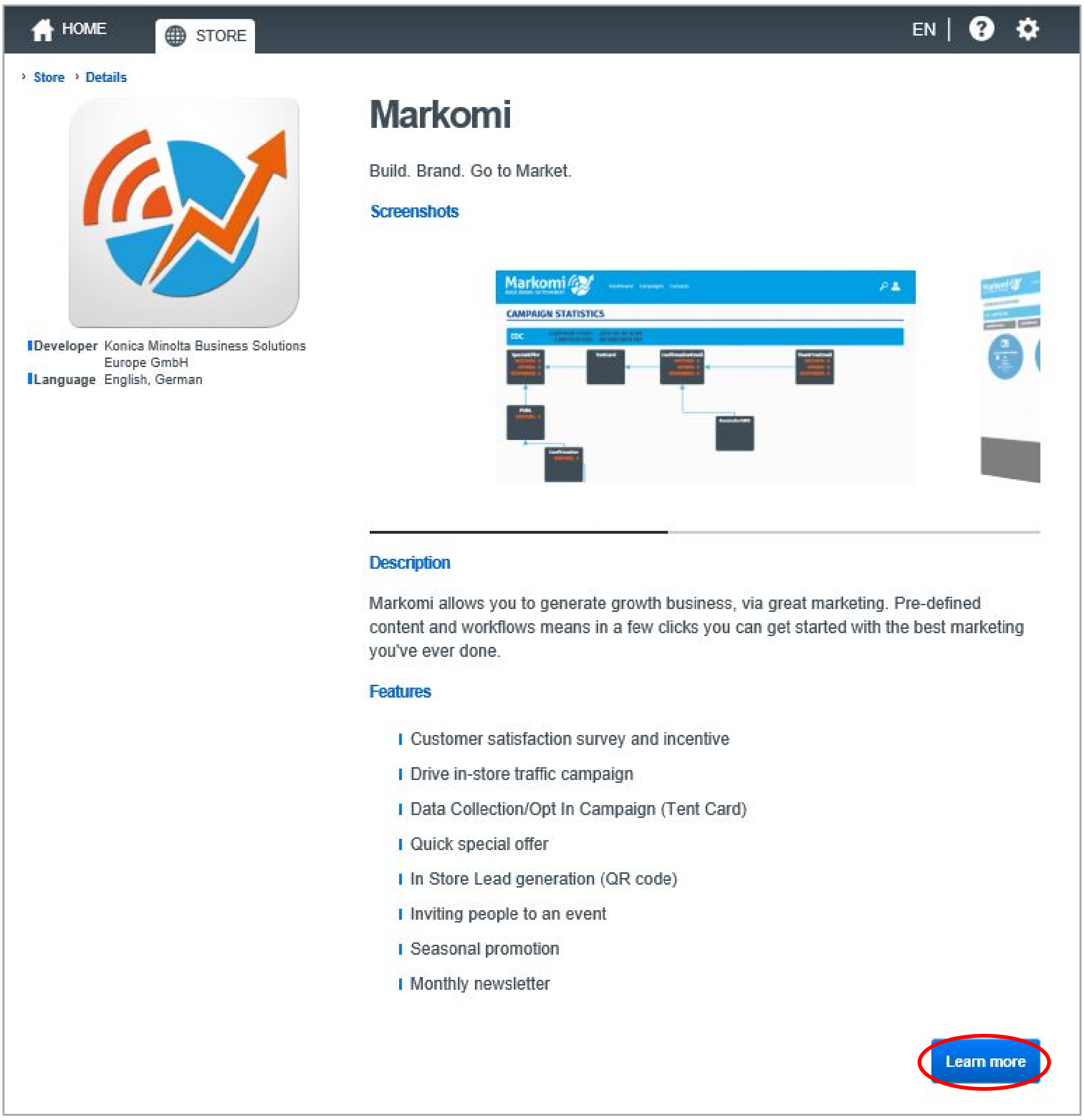
In order to get Markomi, you will need to have a bizhub Evolution account. bizhub Evolution is an online store, similar to an app store.

1. Visit www.markomi.com.
2. Click [Get Markomi!].

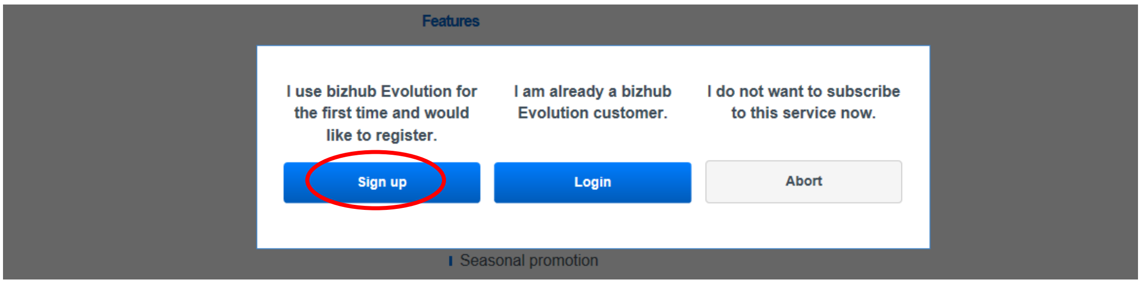
3. Click [GET MARKOMI NOW].
   You will be redirected to bizhub Evolution (https://evolution.konicaminolta.eu/).



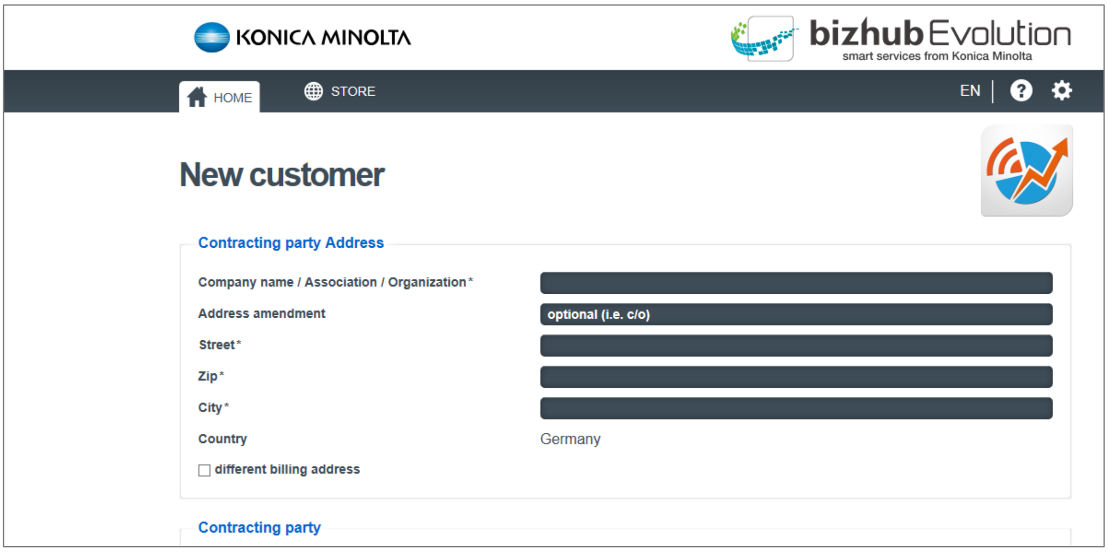
4. Click [Learn more].



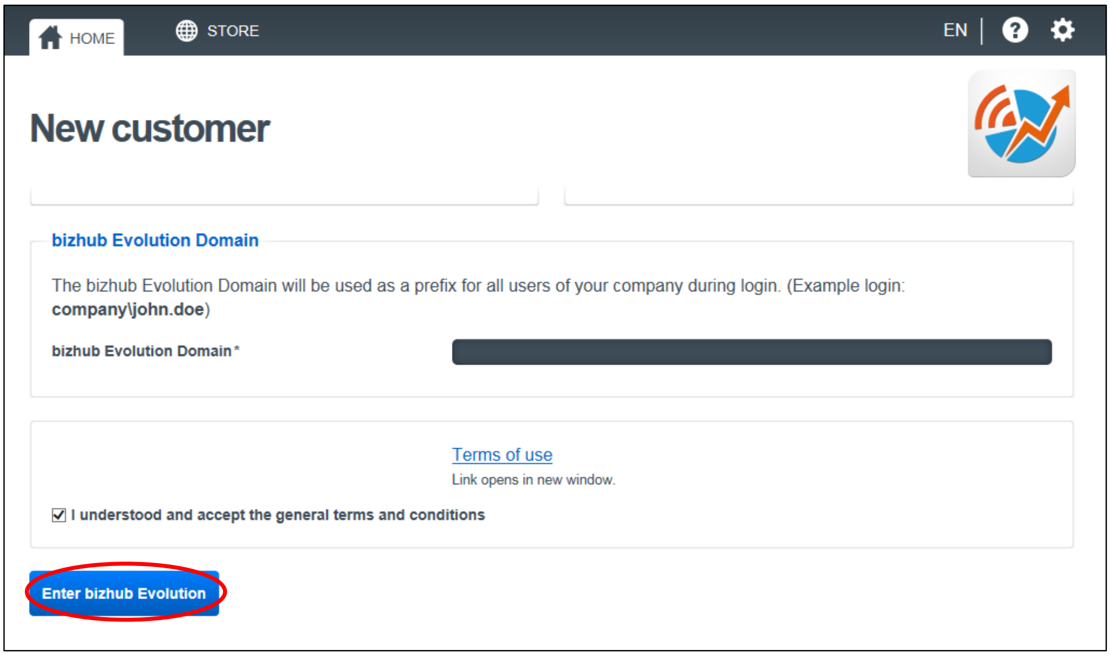
5. Click [Sign up].
   You will be redirected to the registration form for bizhub Evolution.



6. Fill in the relevant fields.



7. Agree to the terms of use.
8. Click [Enter bizhub Evolution] to confirm your registration.
   You will receive a confirmation mail with your login credentials.



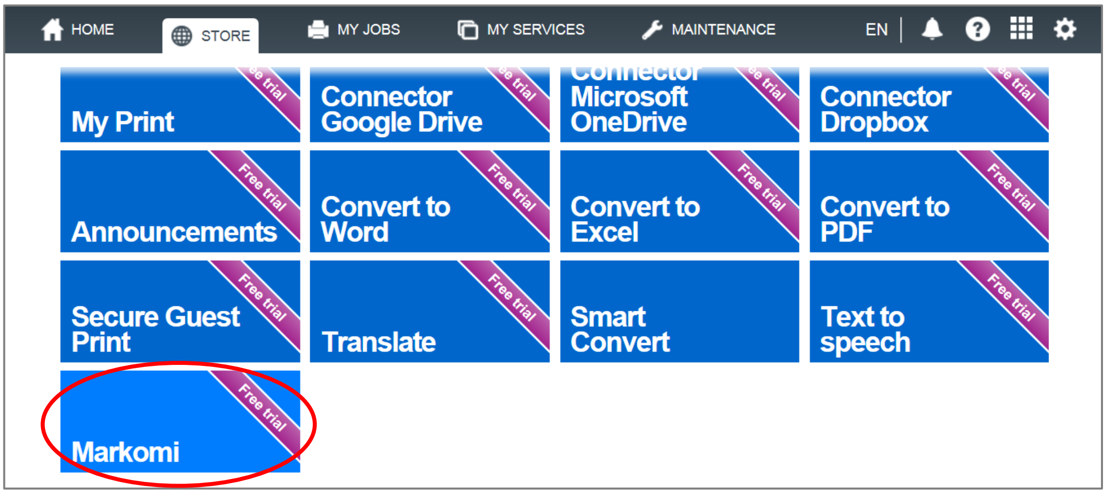
9. Confirm your login by clicking on the link in the e-mail.
   Now you can log in to bizhub Evolution to subscribe to the Markomi package.

Subscribe to Markomi

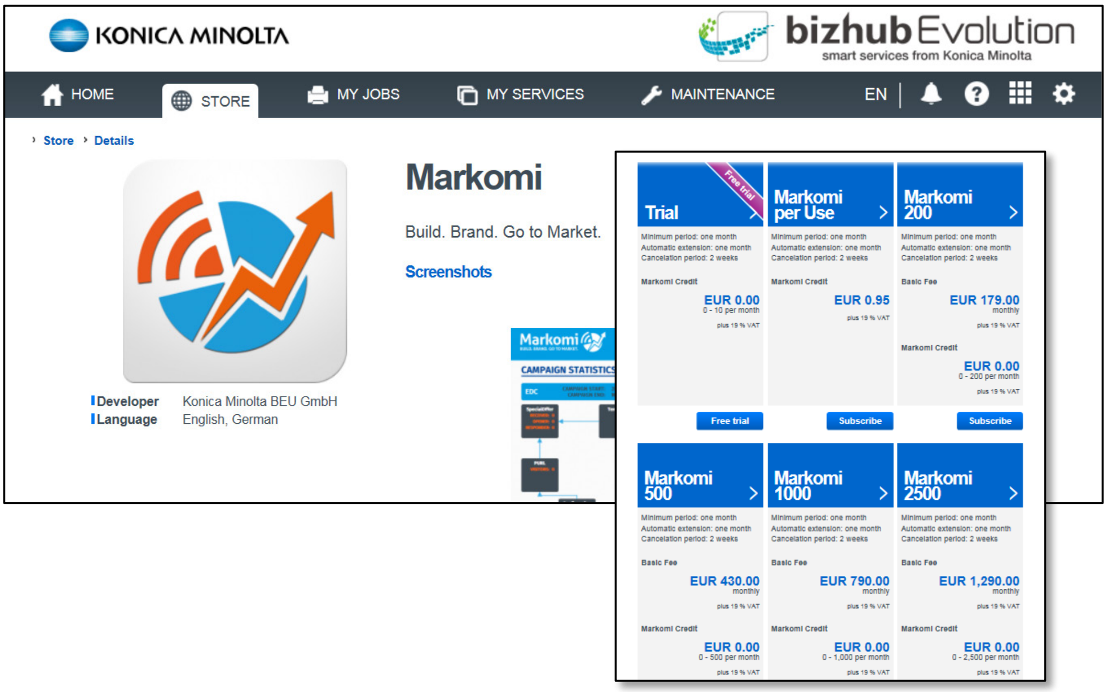
If you already have a bizhub Evolution account, you can subscribe to Markomi.

You can buy credits for Markomi at any time by selecting a corresponding subscription model in the bizhub Evolution store. Credits are the “currency” in Markomi. Outbound e-mails, text messages and inbound contacts each have a certain value in the form of credits in Markomi.

1. Login in to your bizhub Evolution account.
   https://evolution.konicaminolta.eu/
2. Select Markomi in the bizhub Evolution store.



3. Select your preferred package.



4. Agree to the terms and conditions and order the selected package.

   Note
   More Markomi credits can be purchased via bizhub Evolution at any time.

5. ***Once you have the credits***
   Assign Markomi to your user account, or to other users in your organization, by selecting [Assign services now].

6. Select [Markomi] in the left hand column and assign it by dragging and dropping it by your name or another user in the user list.

7. Click [Save] to confirm the assignment.
   Now you can start using Markomi!

Manage users and assign further applications

Once you are logged in, you can create additional users for your organization.

Your original login will have administration rights automatically assigned to it, which makes it easy for you to create more users.

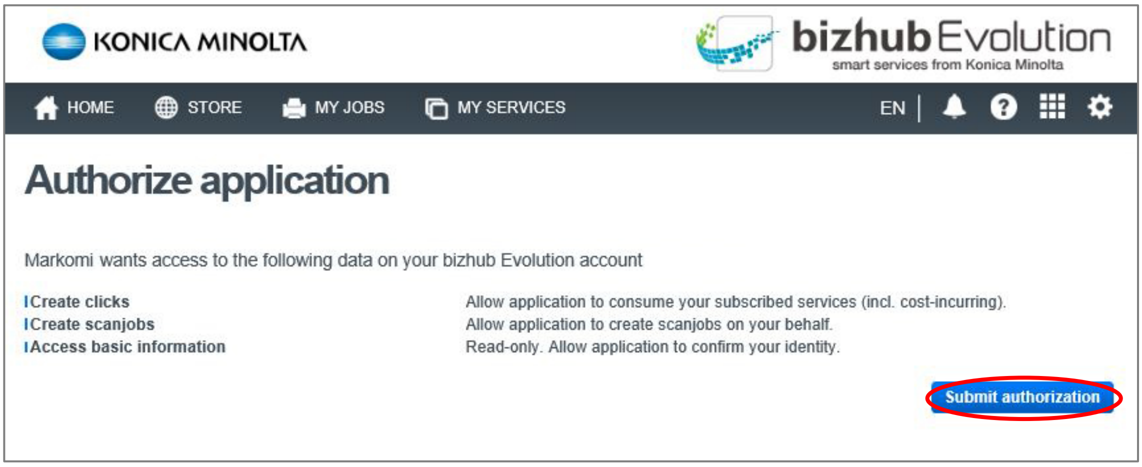
More information about how to set up users and how to assign applications to users is available at https://evolution.konicaminolta.eu/support.

Getting started with Markomi

Log in directly from Markomi

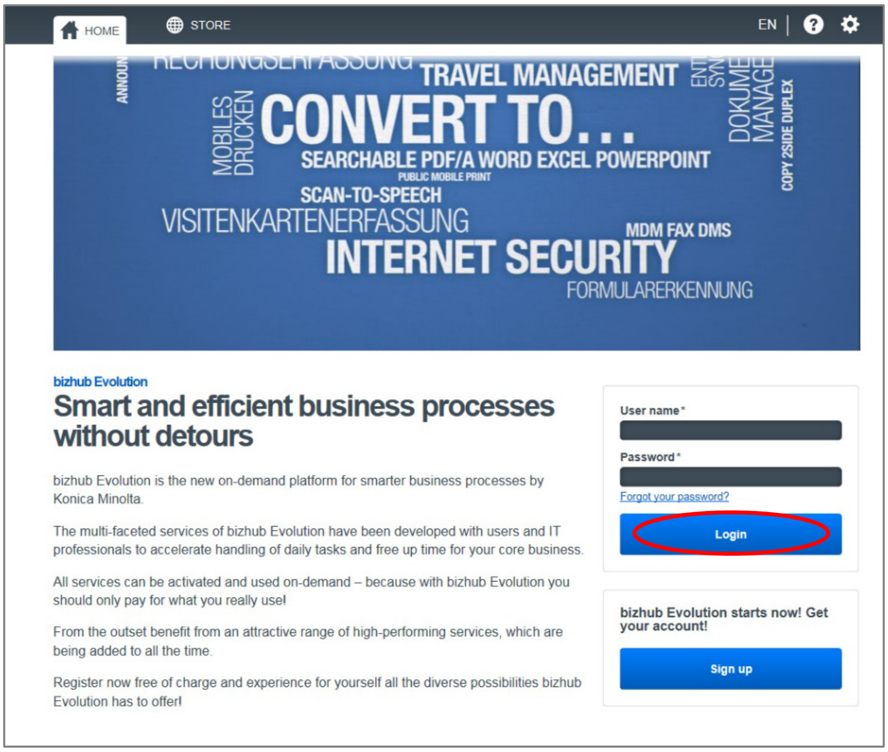
1. Visit www.markomi.com.
2. Click the login icon at the top right and then [Login with bizhub Evolution].

3. When you log in for the first time, you have to submit an initial authorization so that you can log in easily via www.markomi.com at any later time.

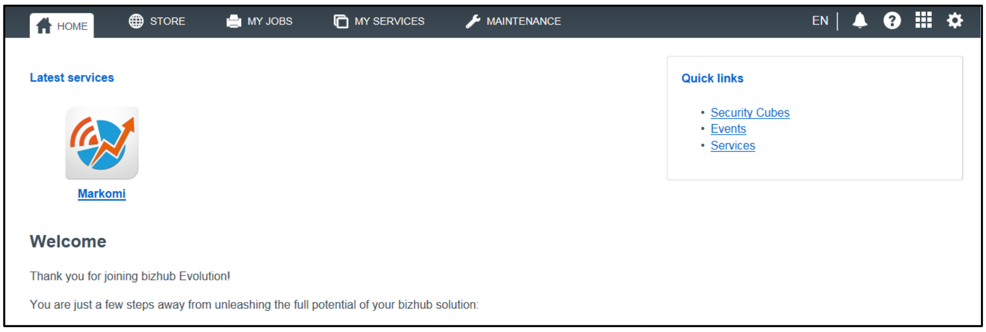


Log in via bizhub Evolution

1. Visit https://evolution.konicaminolta.eu.
2. Select the shop for your country.
3. Enter your login credentials.
4. Click [Login].

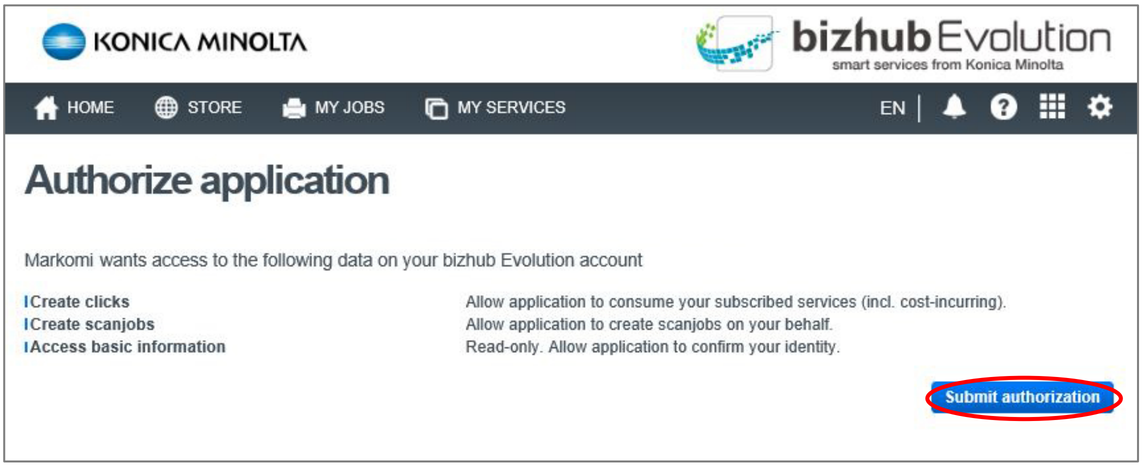


5. Click the Markomi icon on your bizhub Evolution home screen.



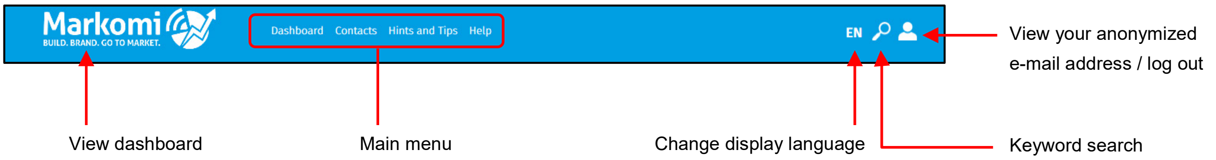
Note
You can also find the Markomi icon under [MY SERVICES].

6. When you log in for the first time, you have to submit an initial authorization so that you can log in easily at any later time.



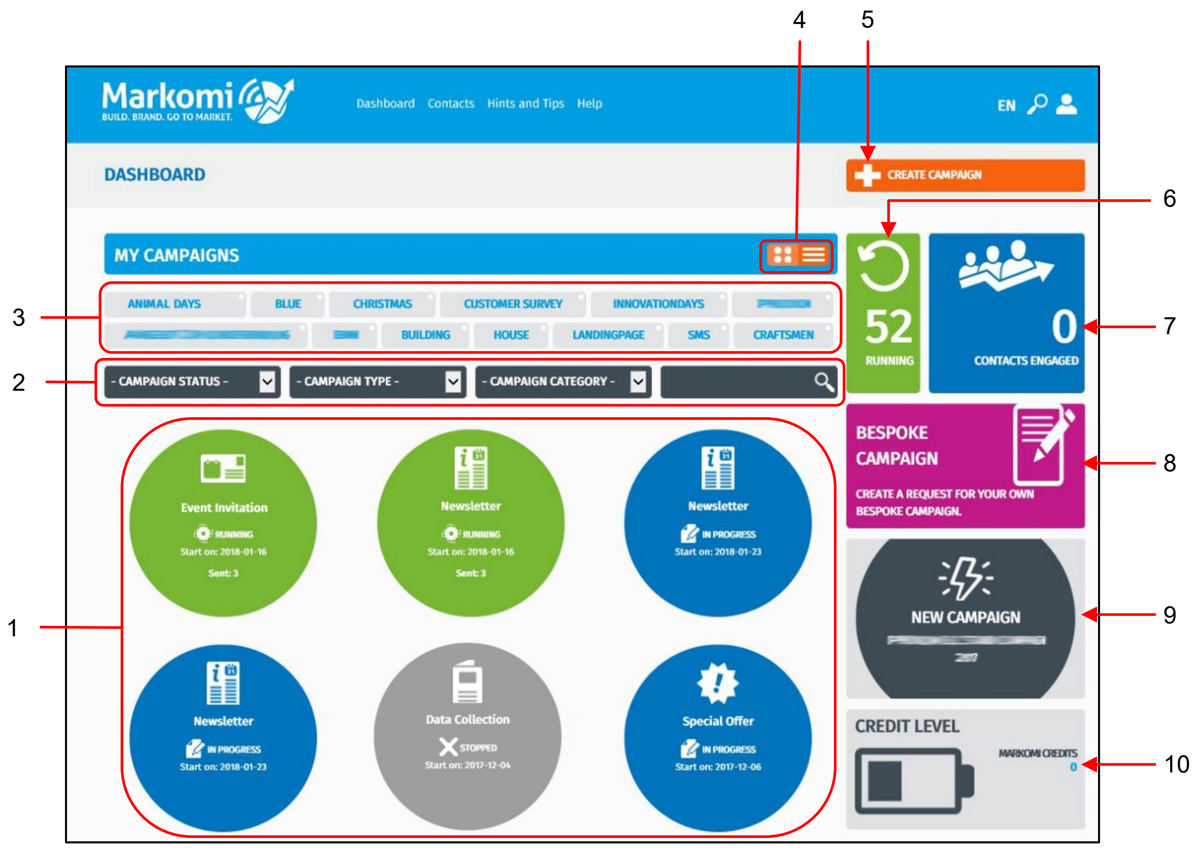
Quick access toolbar

The quick access toolbar is available at all times. From there you can access the dashboard or main menu, adjust general settings or run a keyword search.



Dashboard

This screen gives you an overview of all campaigns and their status. You can filter or search campaigns, create a new campaign or request a bespoke campaign. Click on a campaign icon to show editing options.



1	Campaign area. Each circle shows the name and status of a campaign. The color varies depending on the status and type of campaign. → Click on a campaign icon to show editing options.
2	Filter your campaigns by status, time and category, or run a keyword search. Filters and keyword searches can be combined.
3	Select one or more buttons to filter your campaigns by theme.
4	Switch between icon view or list view
5	Create a new campaign
6	Shows how many campaigns are currently running. → Click on it to filter by running campaigns.
7	Shows how many contacts have been engaged. → Click on it to download the contact list.
8	Create a request for a bespoke campaign
9	Promotes new campaigns that have been loaded into the system. → Click on it to customize this campaign
10	Shows you how many credits you have remaining on the system. If you have ordered the package "Markomi per Use", this window will say "Unlimited".

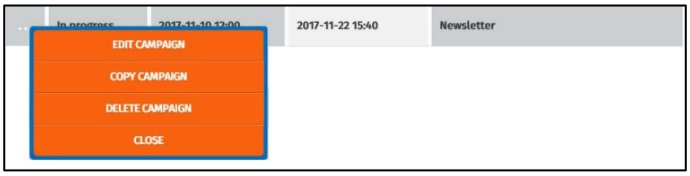
List view

Click on the list icon to view your campaigns as a list.

The 10 most recently created campaigns are shown first. Use the page indicator at the bottom of the list to view more entries. Click [SHOW ARCHIVED CAMPAIGNS] to display campaigns that have been archived.

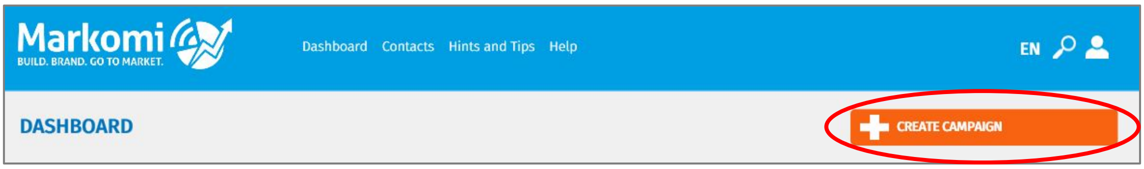
Tip
Click the little arrows by the column headings to change the sort order, e.g. from the oldest entry to the most recent, or to sort the list alphabetically by campaign name.

Click the three dots […] at the beginning of an entry to show campaign editing options.

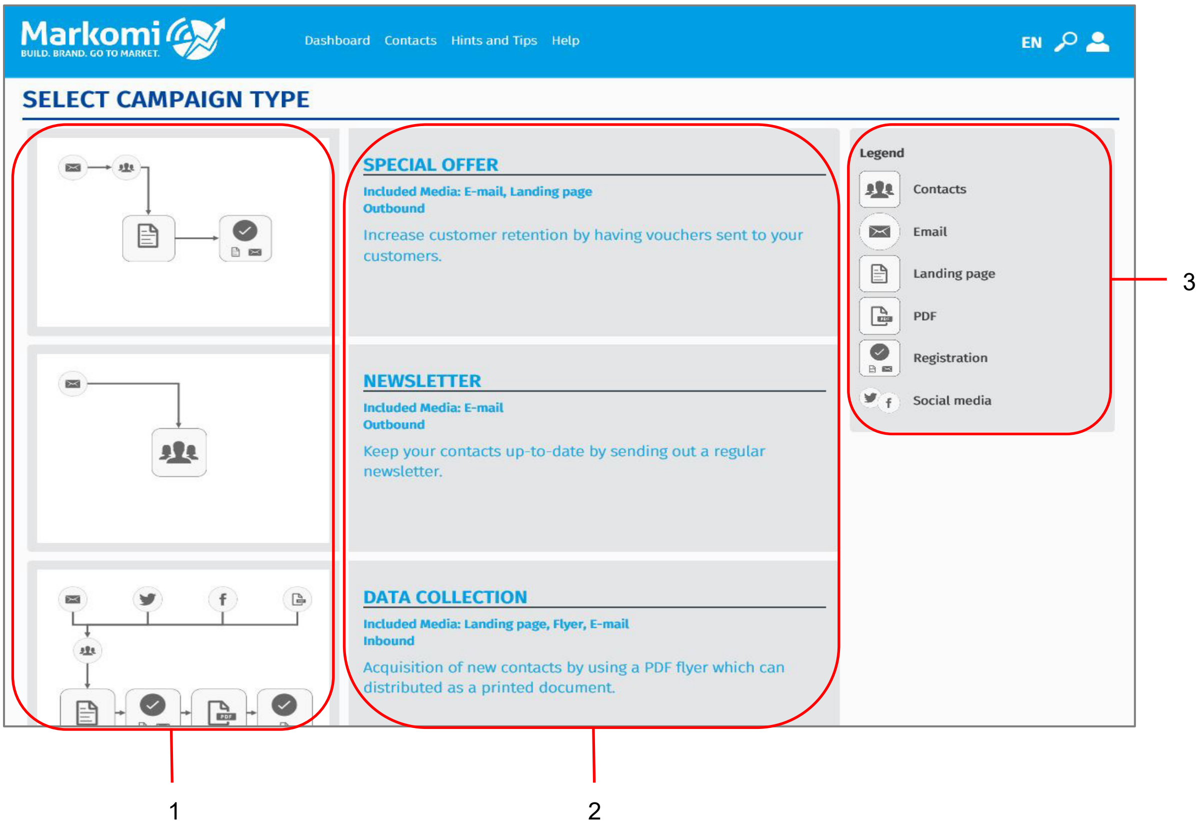


Creating a campaign

7. On the dashboard, click on [CREATE CAMPAIGN].

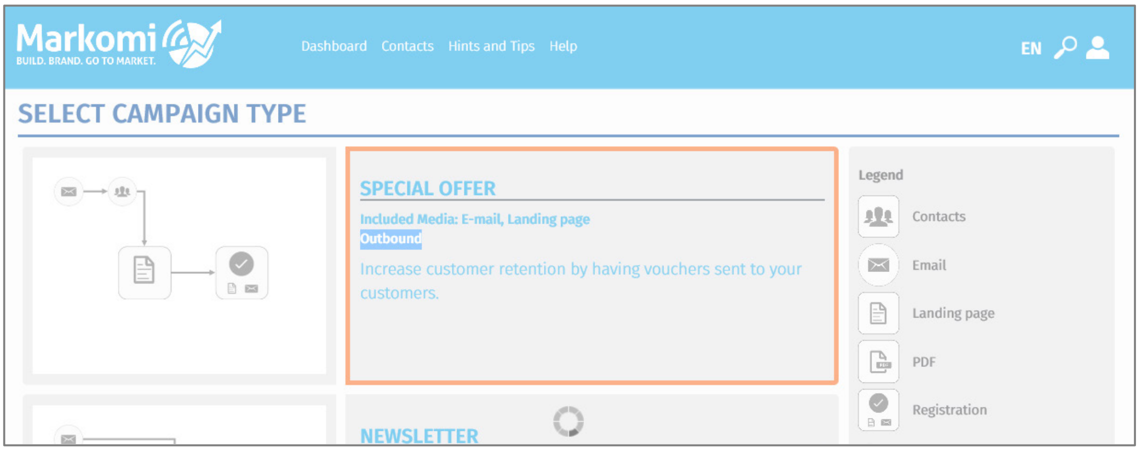


This launches the campaign wizard.

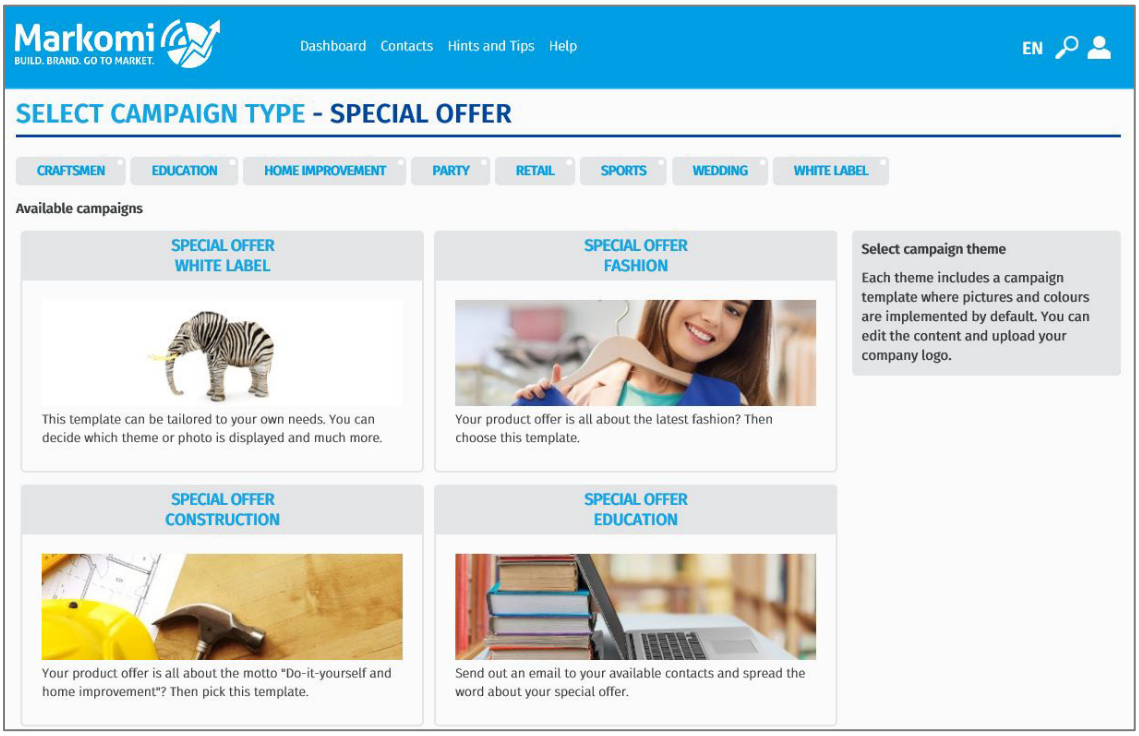


1	Shows the workflow of a campaign. → Click on it to see an expanded view.
2	Select the preferred campaign type
3	Shows a legend of the icons used in the campaign workflow

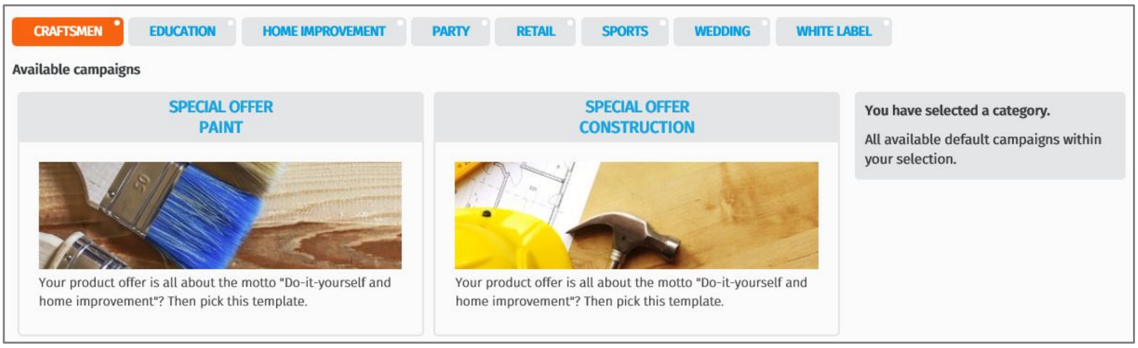
8. Select a campaign type.



All available campaign themes are shown.

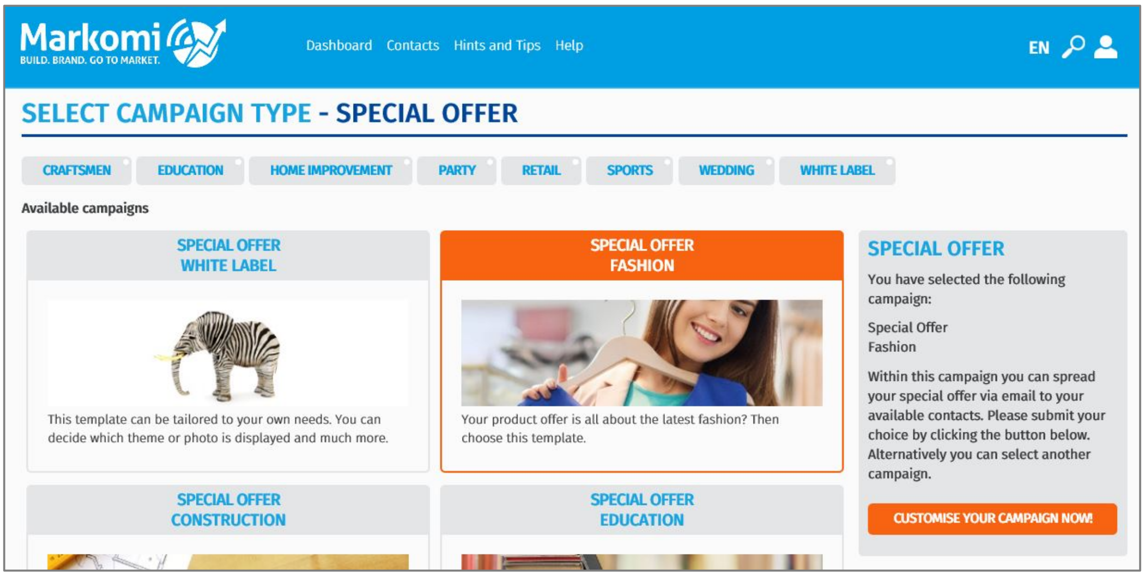


TIP
Click on the grey buttons to filter by category.



9. Select a campaign theme.

   Note
   Colors and images in most templates are fixed and cannot be changed. However, if you want to add your own images and edit colors, use a white label campaign template.

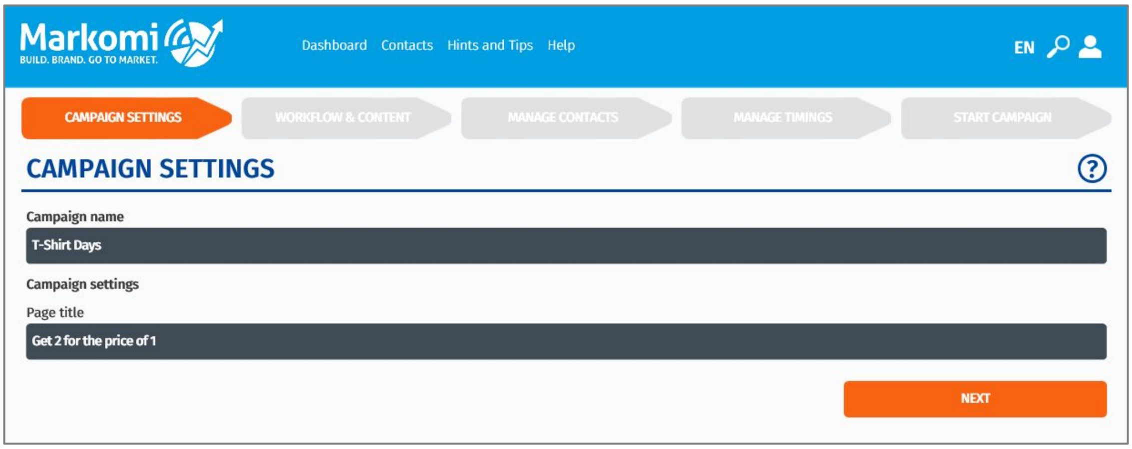


10. Click on [CUSTOMIZE YOUR CAMPAIGN NOW].

    Follow the steps to set up all campaign content, upload the address list for the campaign and schedule when it starts:

Campaign settings

Give your campaign a name and specify a page title.

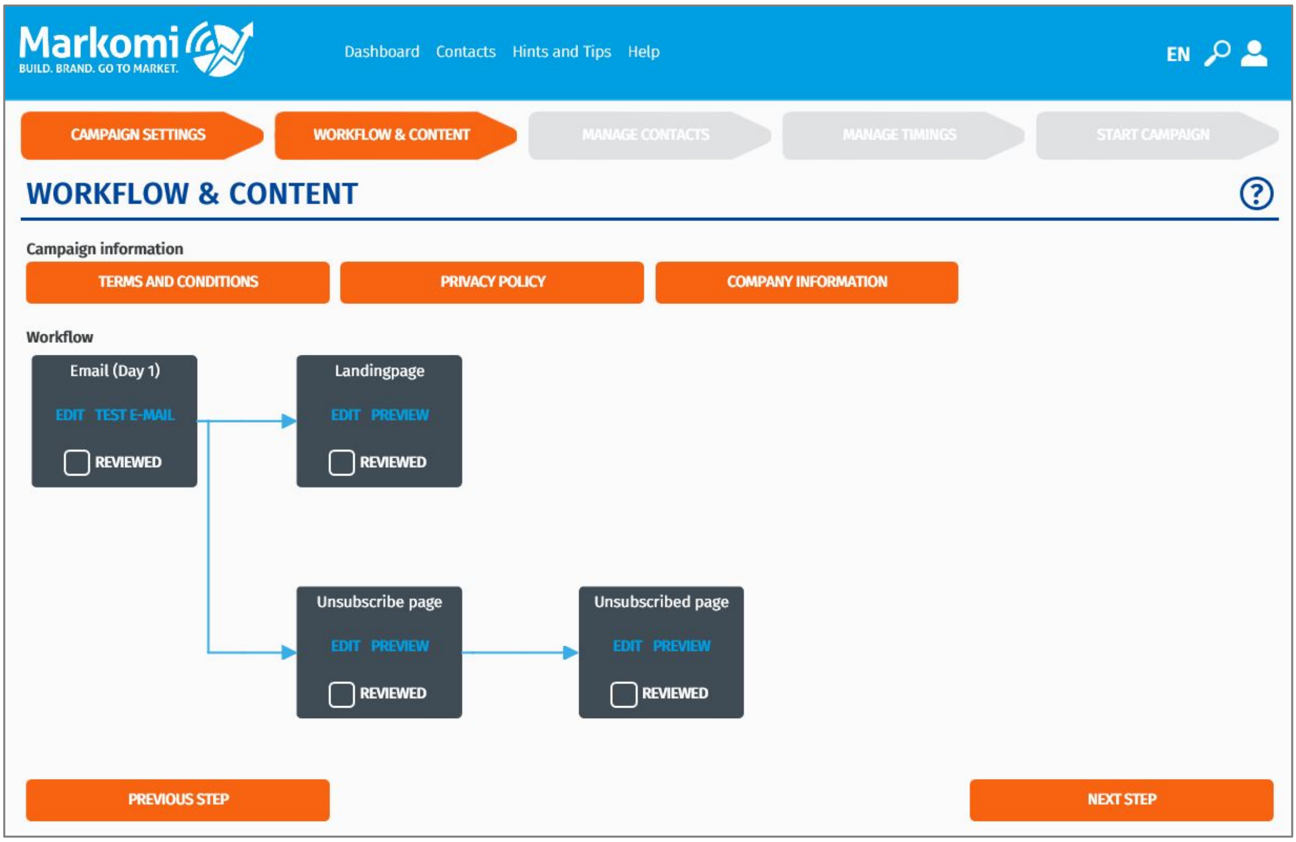


NOTE
The page title will be shown in the browser tab of any campaign element.

Workflow & Content

Define, edit and review the content of your campaign.

NOTE
Workflow and content depend on the selected campaign type and theme.



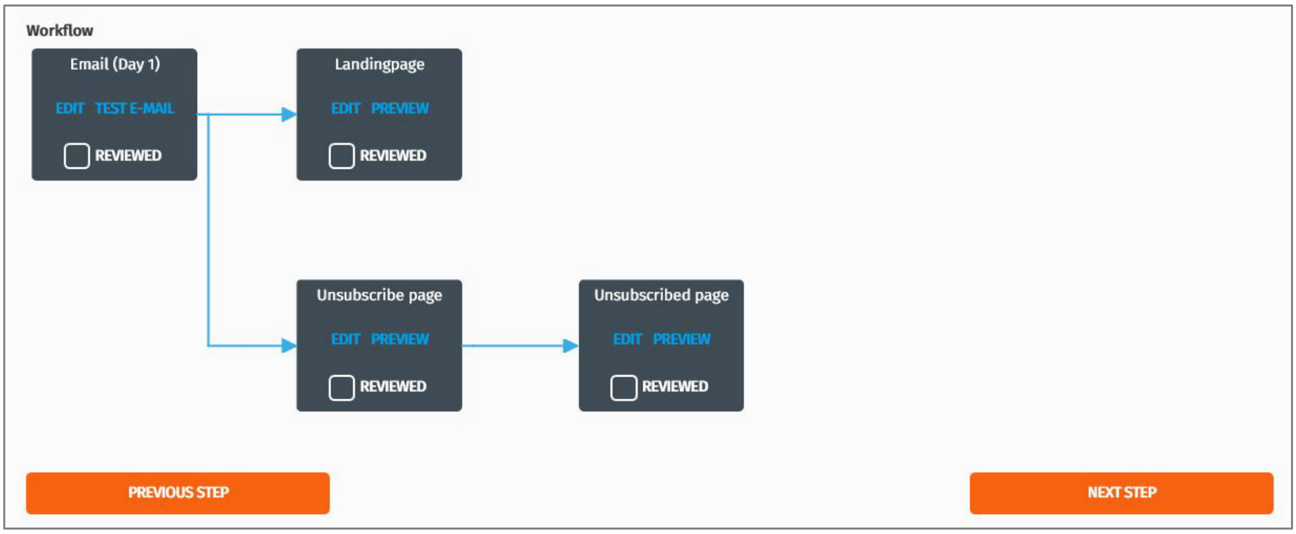
Campaign information

Enter information that is the same across all elements in your campaign.

TERMS AND CONDITIONS	Explain any restrictions, rules or guidelines that you have in place that relate to the campaign. Include your obligations regarding the transaction and your relationship with the customer, and the obligations your customer has.
PRIVACY POLICY	Explain how you plan to handle the data that people give you when they respond to the campaign, i.e. that you will not share the data with third parties.
COMPANY INFORMATION	Enter information that relates to your company, such as address, company number, VAT number.

Workflow

The workflow shows all elements of your campaign and how they are processed.



Each box contains an element of the campaign, which can include:

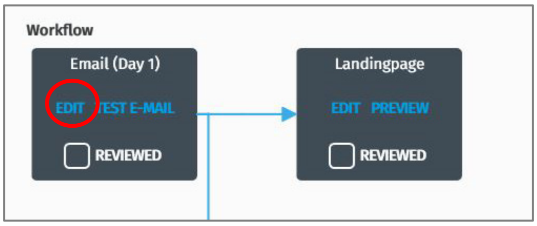
- Printed flyers
- Landing pages and forms
- E-mails
- Vouchers
- Mechanisms to unsubscribe
- Withdrawals and confirmations

NOTE
To edit an element, click [EDIT] in the relevant box.
Once you have finished editing, someone else should check the changes you made and tick the [REVIEWED] box.
You can preview your changes by clicking [PREVIEW]

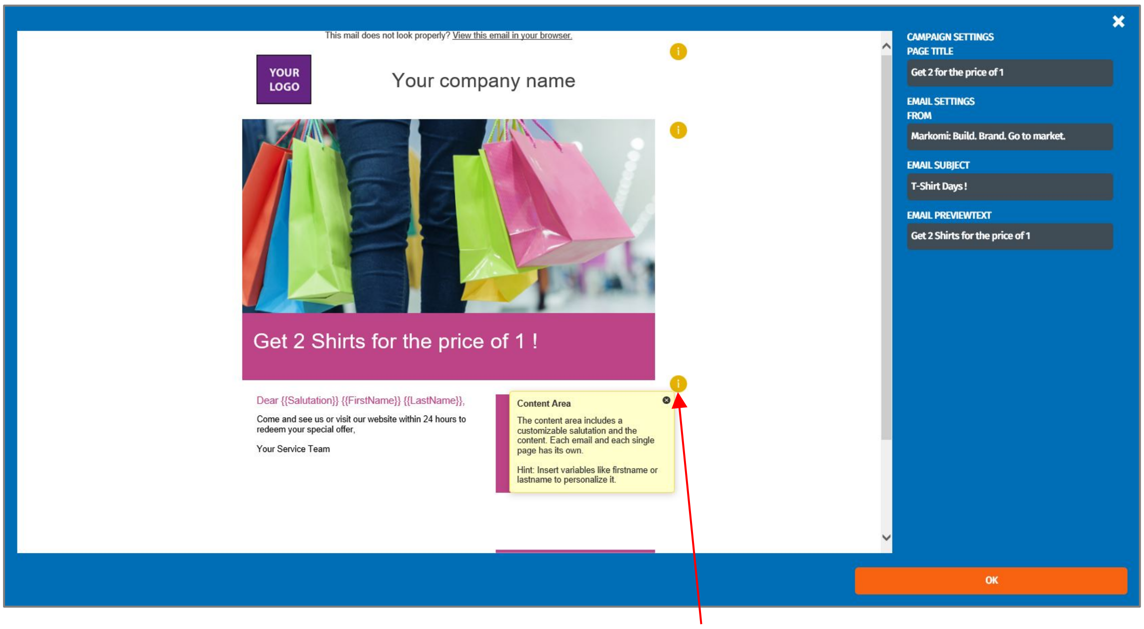
Edit a campaign element

What you can edit will depend on how the template is set up. In some templates you can replace images, in some you cannot. You can usually edit all of the text.

1. Click [EDIT] in the relevant box. In this example, an e-mail is edited.



2. Customize text and images as desired and define the campaign settings.



Click on this icon to show hints about the editable area.

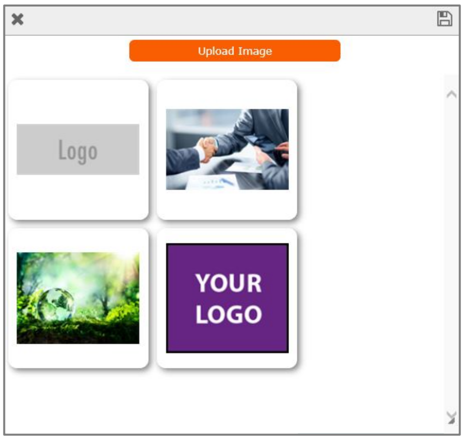
3. Click [OK].

Upload and replace images

Whether you can replace an image will depend on how the template is set up. Some images are replaceable, some are not. Logos, however, can always be personalized.

NOTE
Images in printed items require a resolution of 300 dpi to be displayed properly.

1. Click on the image you want to replace.
2. Click on [Upload Image].



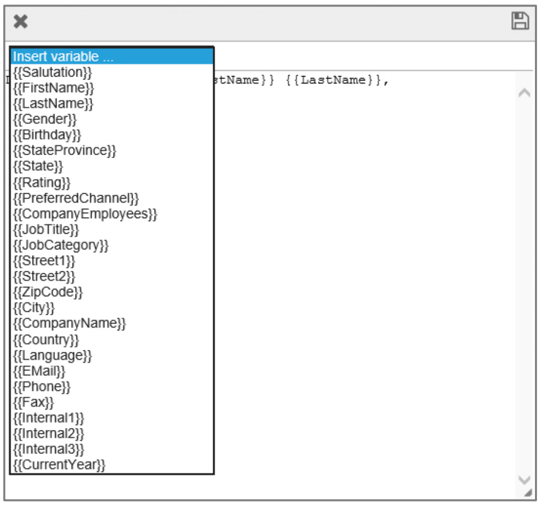
3. Select your image from the file tree and click [Open].
   The image is uploaded.
4. Click on the desired image.
   The image is replaced.

   Note
   If you replace a logo, it will be applied to all e-mails and pages.

Insert variables

Reach out to your subscribers on a more personal level by using variables such as first names or last names. You can insert variables in any text.

1. Click on the text you want to edit.
2. Position the cursor and select the appropriate variable from the drop-down menu.



The variable is inserted.

3. Click on the save icon.

   Once your campaign has started, the variable will be replaced by your subscribers' data. An e-mail should at least contain a personal greeting.

Change URL / insert a QR code

URLs (e.g. PURLs) and related QR codes are generated automatically by Markomi. If you want to use simplified or your own URLs, you have to set up additional forwarding outside of Markomi.

Note
We recommend you do not change the URLs created by Markomi unless you have the required IT skills to set up forwarding to another URL.

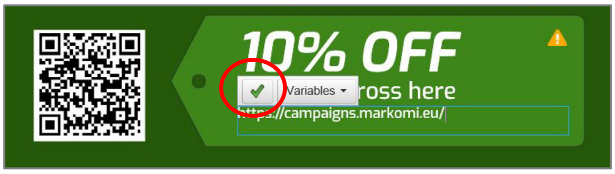
Step 1: Changing the URL (in Markomi)

1. Click on the URL you want to edit.
2. Click on the edit icon.

3. Copy the original Markomi URL and save it so that you can access it later.

   Note
   You will need the original Markomi URL to set up forwarding!

4. Change the URL as required (e.g. to a URL of your own domain like "supersale.mydomain.com").
5. Click on the check mark to close edit mode.



Note
The related QR code will be inserted/updated by Markomi automatically.

Step 2: Set up forwarding (outside Markomi)

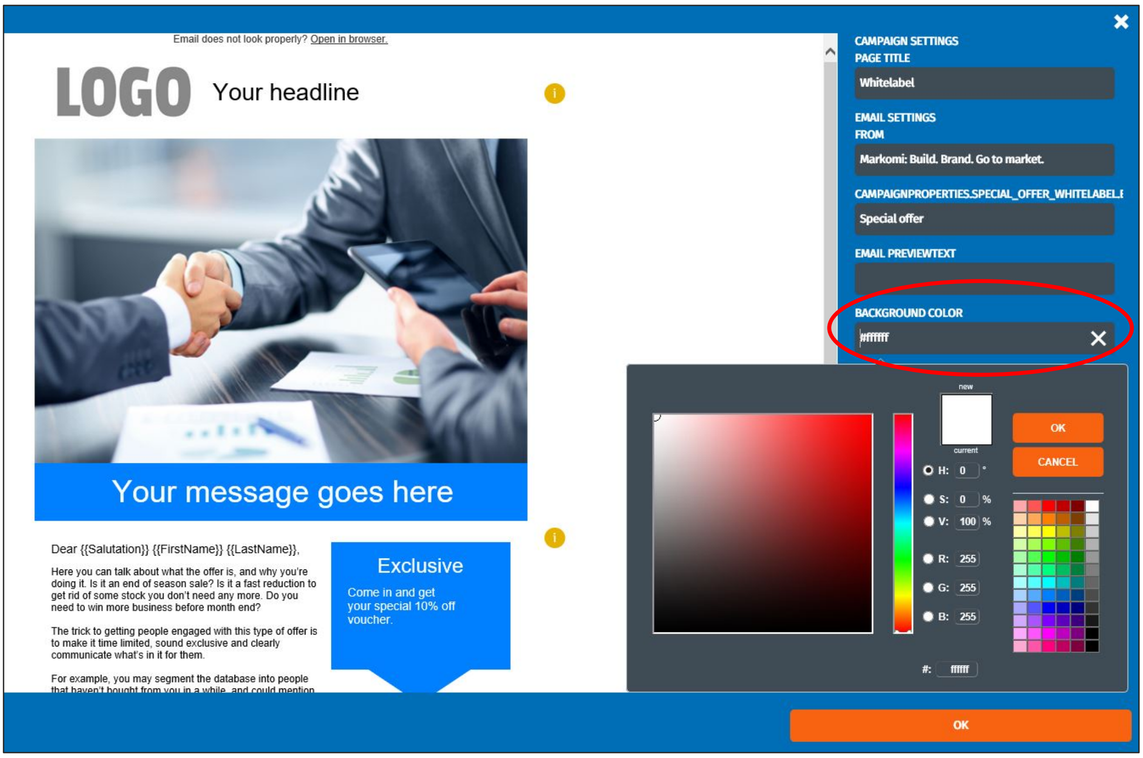
Set up forwarding from the URL that you entered (e.g. "supersale.mydomain.com") to the URL that was originally created by Markomi.

Changing colors

The colors of items (e-mails and pages) can be changed in all white label campaigns. You can change the color of the background, text, box and button elements as well as the footer.

NOTE
Colors for theme campaigns cannot be set individually.

1. On the right-hand side of the edit window, click on the color code you want to change. The color picker opens.

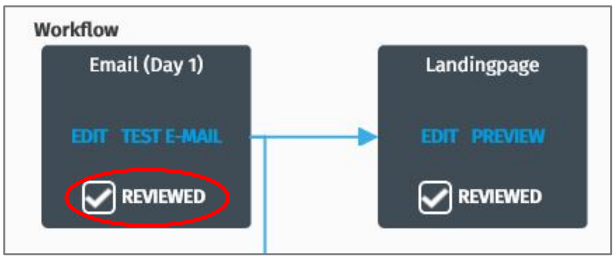


2. Select the desired color and click [OK].

   Note
   If you know the exact hexadecimal code of a color, you can enter it directly.
   If you know the RGB values of the color, you can enter them in the fields R: G: B: of the color picker.

Review your content

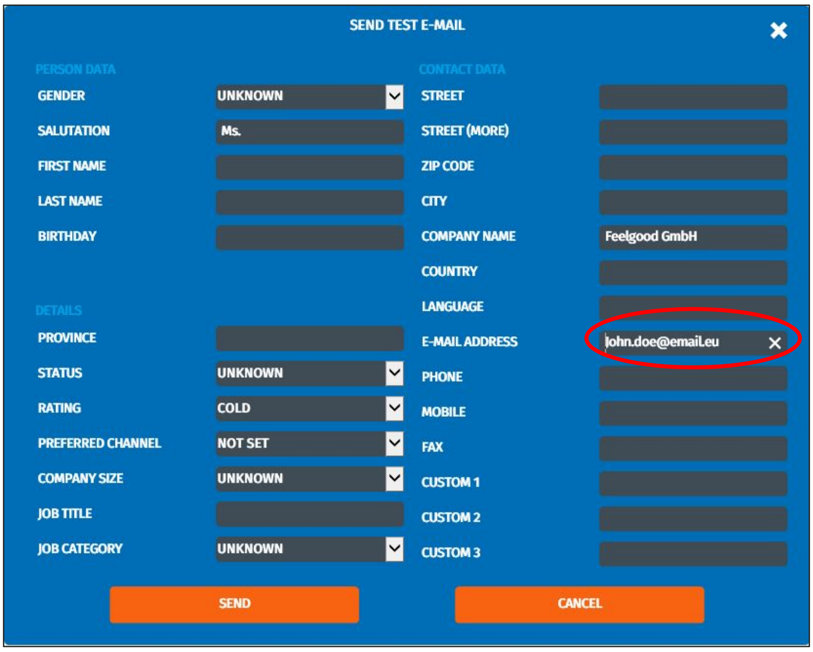
Once you have finished editing, someone else should check the changes you made and tick the [REVIEWED] box.



You can preview your changes by clicking [PREVIEW].

Send a test e-mail

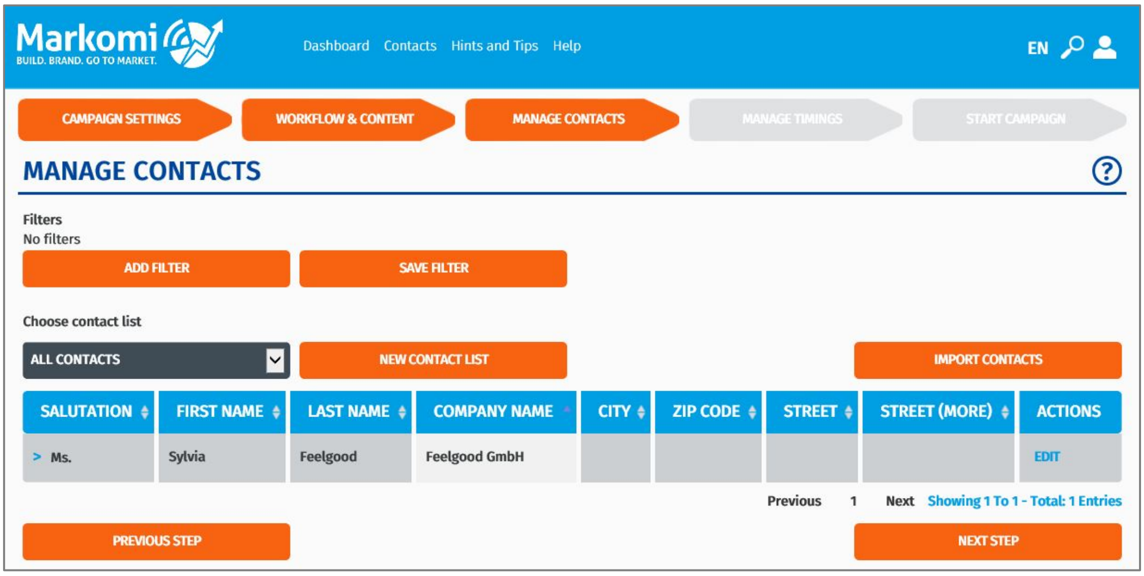
If you want to check how an e-mail looks, send yourself or your reviewer a test e-mail.
To do this, click on [TEST E-MAIL], enter the relevant information (at least the e-mail address), and click [SEND].



Manage contacts

Select the recipients of your campaign. You can use an existing list, or upload a new list.

Note
Make sure your data handling complies with the data protection regulations in your country. The system has some restrictions when it comes to checking the quality and format of the content you upload and you are responsible for any data uploaded to Markomi in terms of compliance and format.



Filters

Add filters to only select contacts that meet certain criteria.

1. Click on [ADD FILTER].
2. Enter the filter criteria

3. Click [SAVE FILTER]

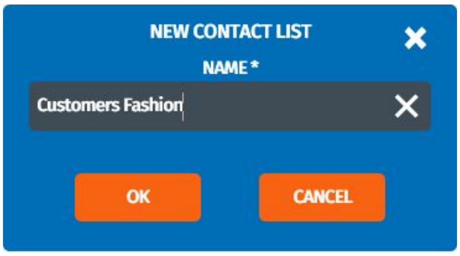
Note
You can define two or more filters in parallel.
Click on [REMOVE FILTER] to delete the filter criteria.

Choose contact list

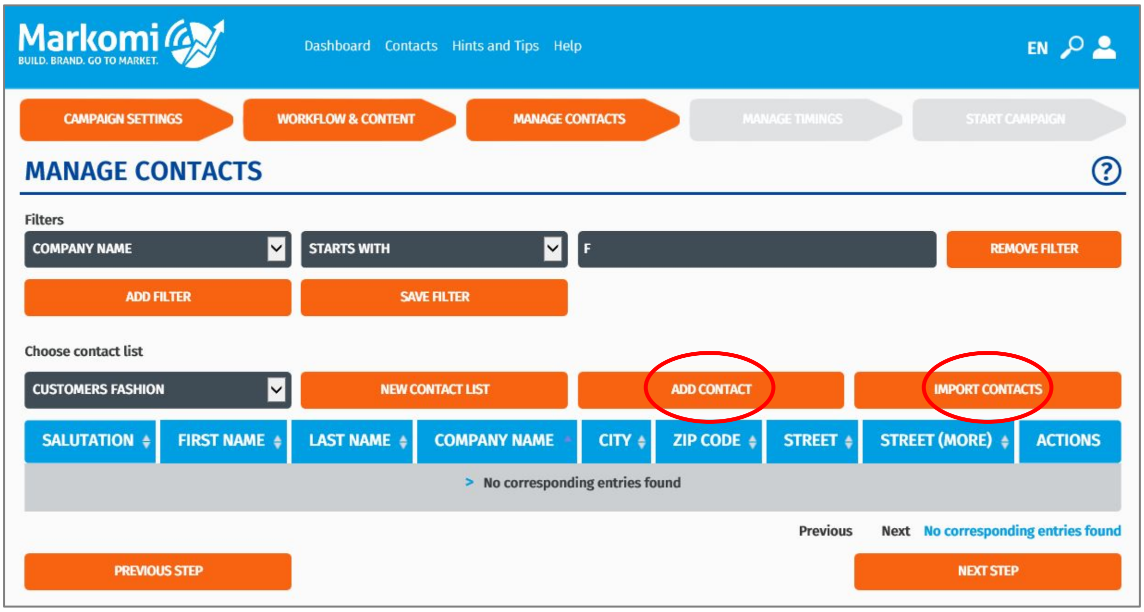
Either select all contacts or the contact list containing the desired recipients of your campaign.

Create a new contact list

1. Click on [NEW CONTACT LIST].
2. Give your contact list a name and click [OK].

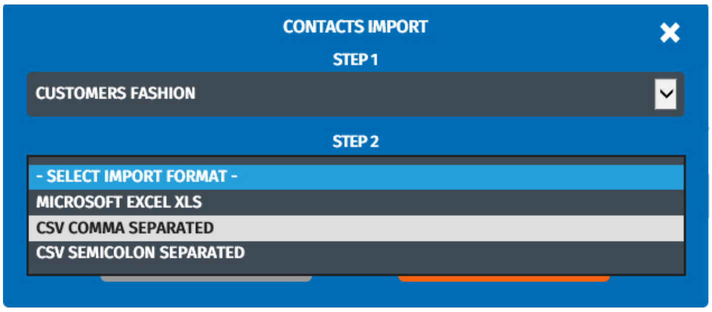


3. Either click on [ADD CONTACT] to add a single contact or click on [IMPORT CONTACTS] to upload an existing list.

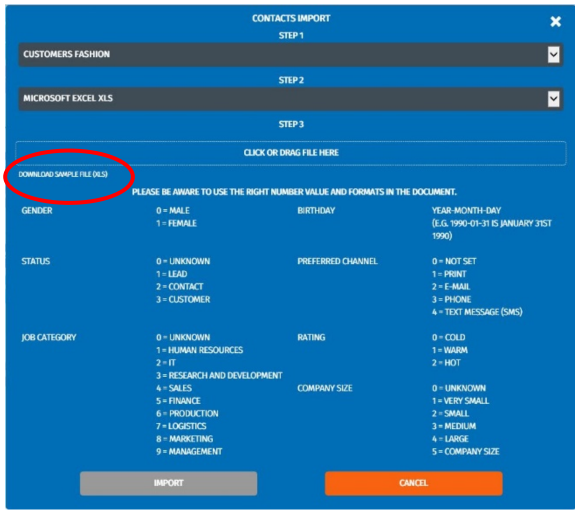


Import contacts

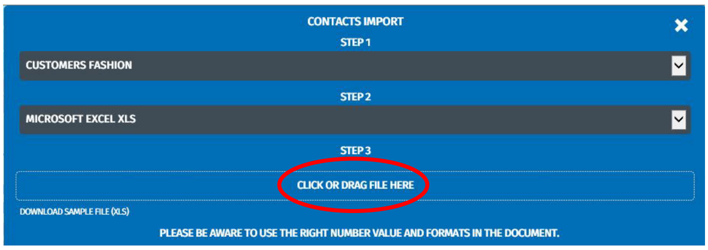
1. Click on [IMPORT CONTACTS].
2. Select the import format.



3. Download the sample spreadsheet, and use the codes contained in the explanation table, so that your data is in the right format for the system.



4. As soon as your contact file is prepared, drag it to the upload area.



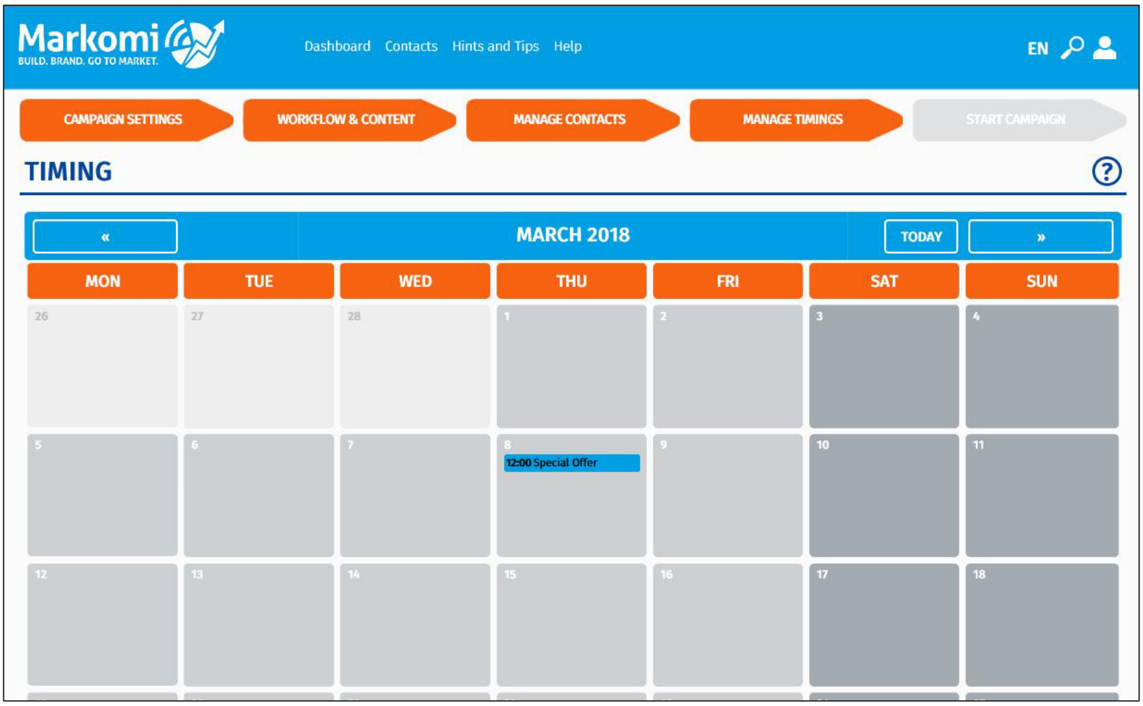
5. Click [IMPORT].

Your contact file is uploaded to Markomi.

Note
If you experience any errors, please check if you have formatted your file correctly.

Timing

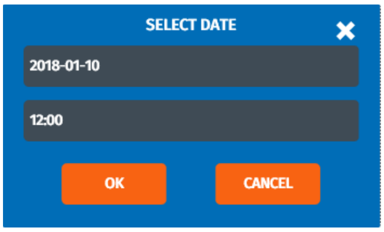
Schedule your campaign. Click on the date you want to start the campaign. Your campaign will end when the selected campaign workflow has been completed, or when you end the campaign manually (e.g. a data collection campaign).



How to schedule your campaign:

1. Click on [<<] or [>>] to scroll through the months.
2. Click on the desired start date.
3. Change the time if necessary.

   Note
   Central European Time (CET) is used. Please adjust your input according to your local time zone if necessary.

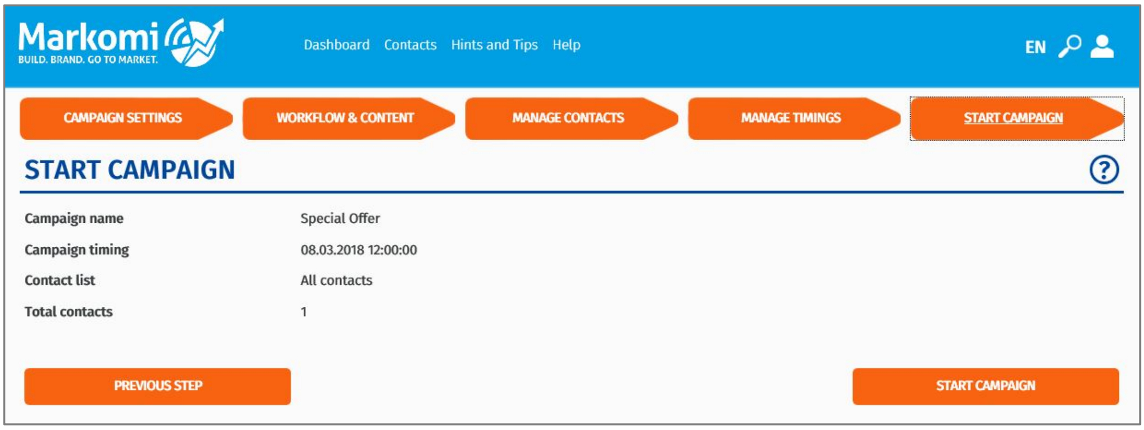


4. Click [OK].

   Note
   If you want to change the date, simply click on a new start date. This will shift the entry.

Starting the campaign

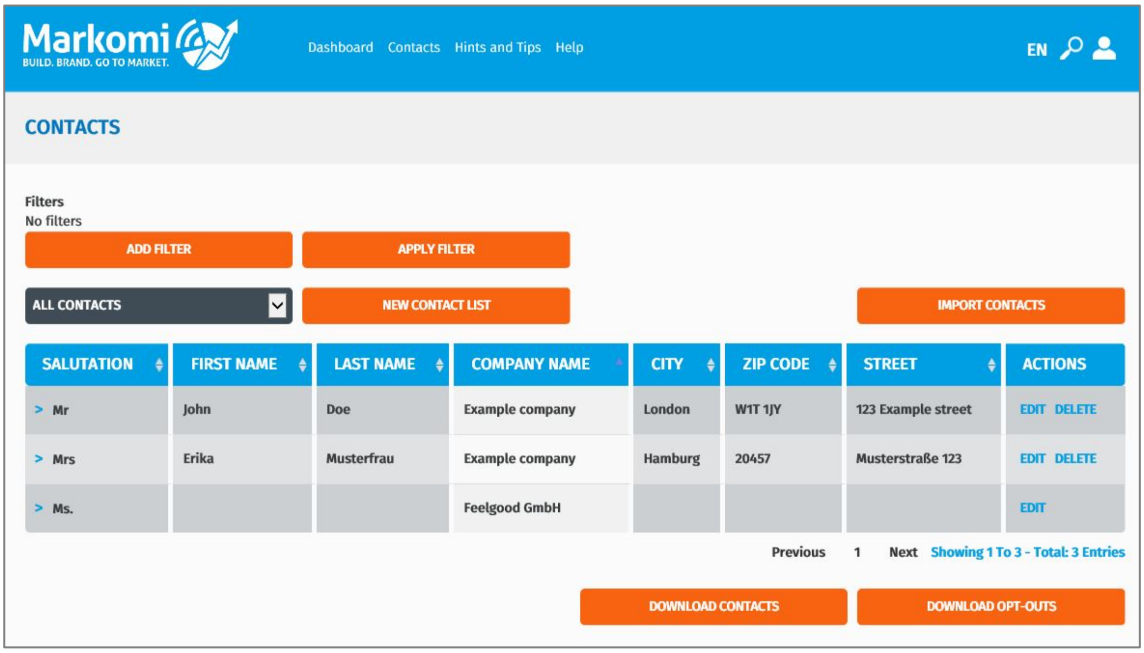
Check the key data of your campaign again. When everything is correct, finally click [START CAMPAIGN].



Contacts

Here you can manage your contacts. You can create or import a new contact list, edit individual contacts or download contacts.

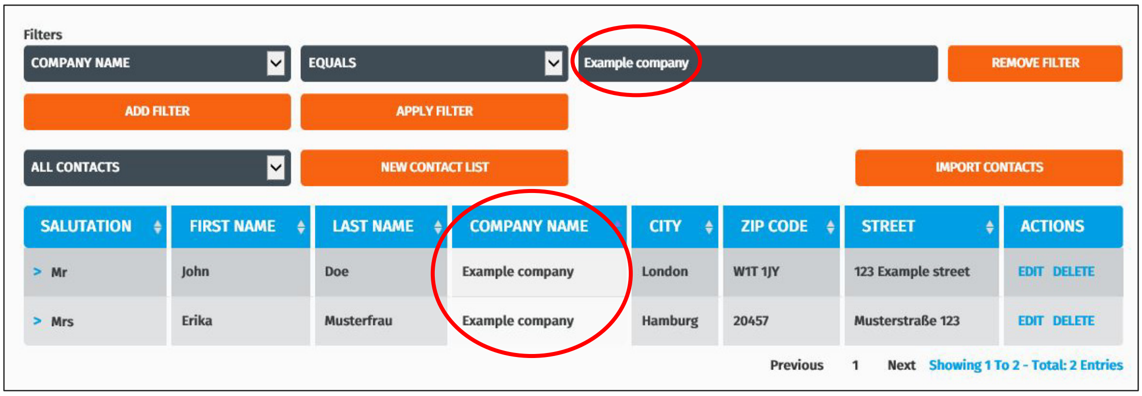
Note
Make sure your data handling complies with the data protection regulations in your country. The system has some restrictions when it comes to checking the quality and format of the content you upload and you are responsible for any data uploaded to Markomi in terms of compliance and format.



Filters

Add filters to only select contacts that meet certain criteria. This allows you to show, for example, all contacts from the same company.

1. Click on [ADD FILTER].
2. Enter the filter criteria.
3. Click [APPLY FILTER] and your contacts are filtered.



Note
You can define two or more filters in parallel.
Click on [REMOVE FILTER] to delete the filter criteria.

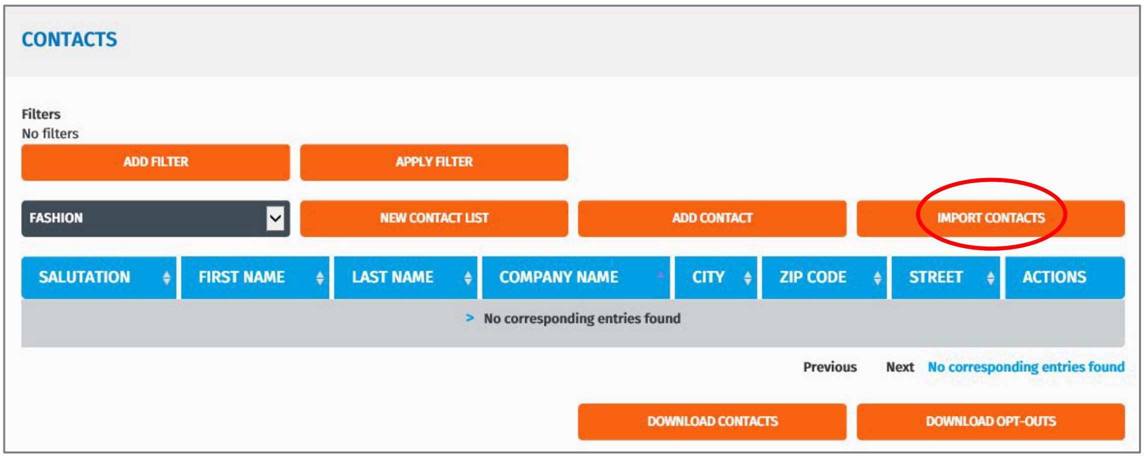
Choose contact list

Select the desired contact list from the drop-down menu, to display only the appropriate contacts.

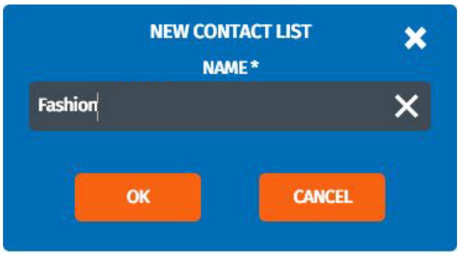
Note
If you create a filter now, it will only refer to the selected contact list.

Create a new contact list

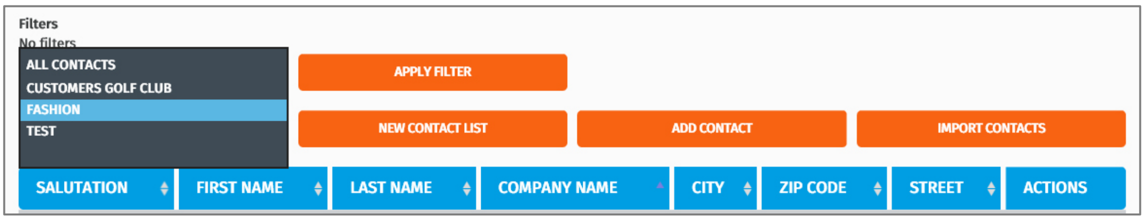
1. In the main menu, click on [CONTACTS].
2. Click on [NEW CONTACT LIST].



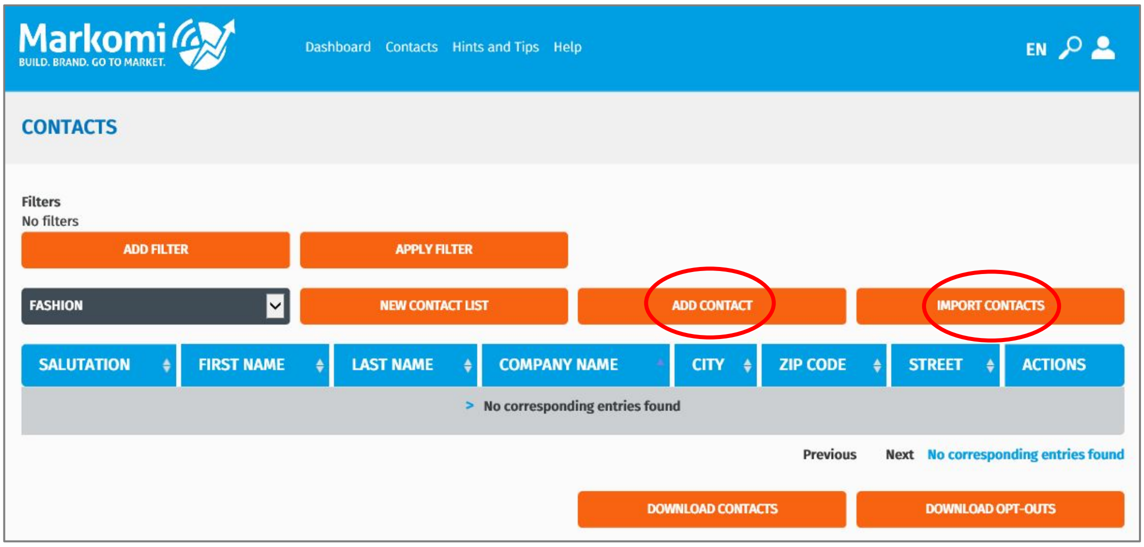
3. Give your contact list a name and click [OK].



4. Select the new contact list from the drop-down menu.

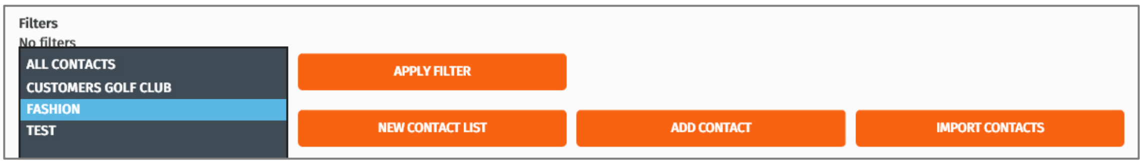


5. Either click on [ADD CONTACT] to add a single contact or click on [IMPORT CONTACTS] to upload an existing list.

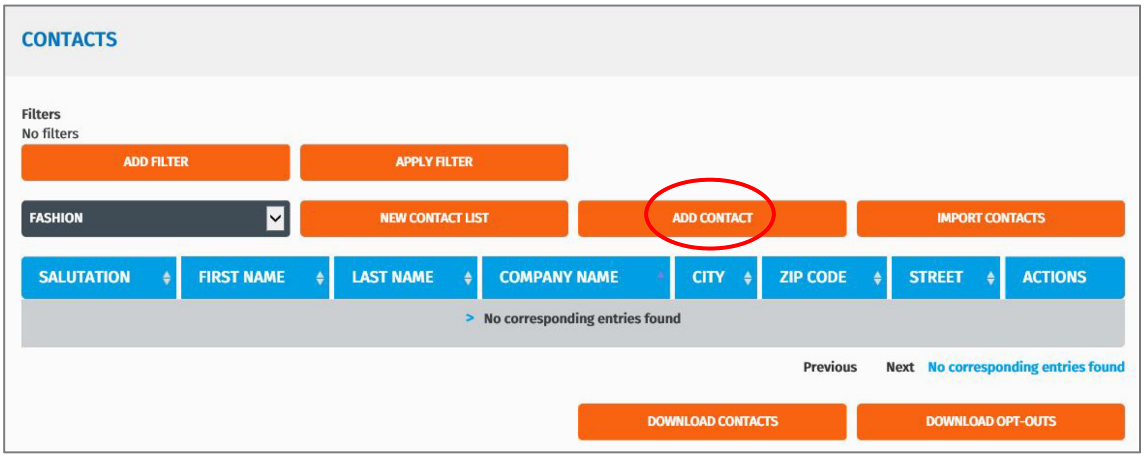


Add contact

1. In the main menu, click on [CONTACTS].
2. Select the list you want to add a contact to.



3. Click on [ADD CONTACT].

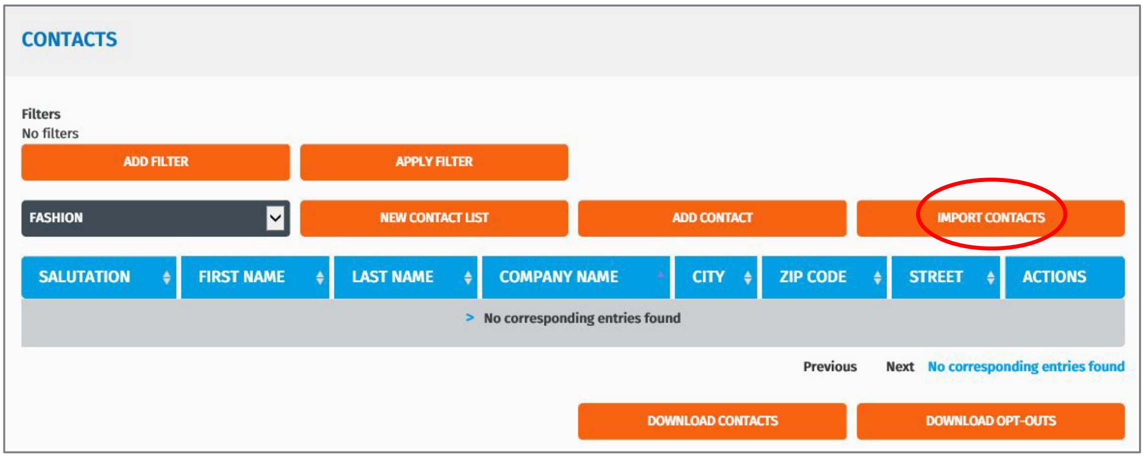


4. Enter the contact information.

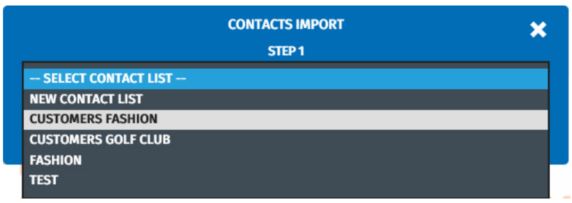
5. Click [SAVE].

Import contacts

1. In the main menu, click on [CONTACTS].
2. Click on [IMPORT CONTACTS].

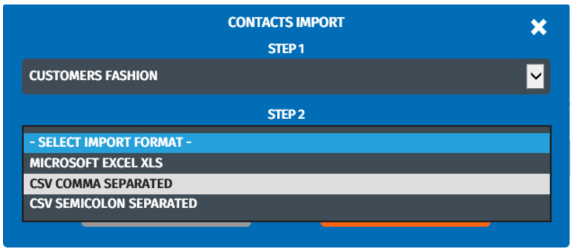


3. Select the list you want to import the contacts to.

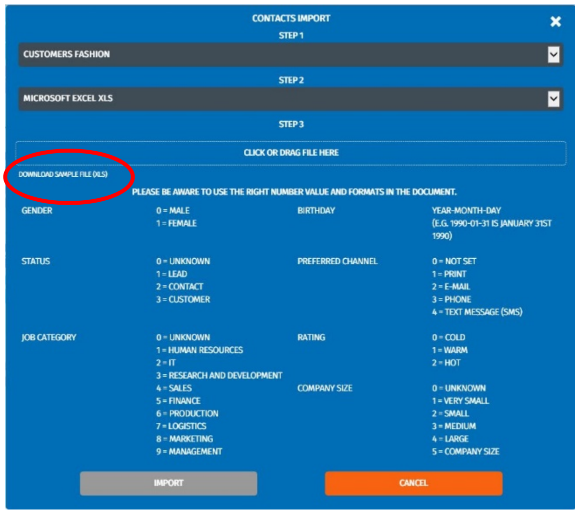


Note
Alternatively, you can also create a new contact list here.

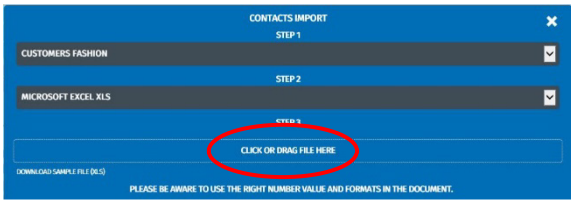
4. Select the import format.



5. Download the sample spreadsheet, and use the codes contained in the explanation table so that your data is in the right format for the system.



6. As soon as your contact file is prepared, drag it to the upload area.



7. Click [IMPORT].

Your contact file is uploaded to Markomi.

Note

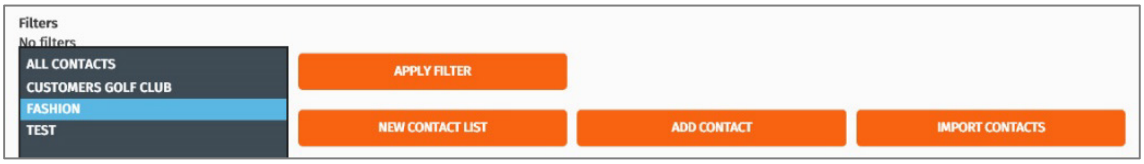
If you experience any errors, please check if you have formatted your file correctly.

Download contacts/Opt-outs

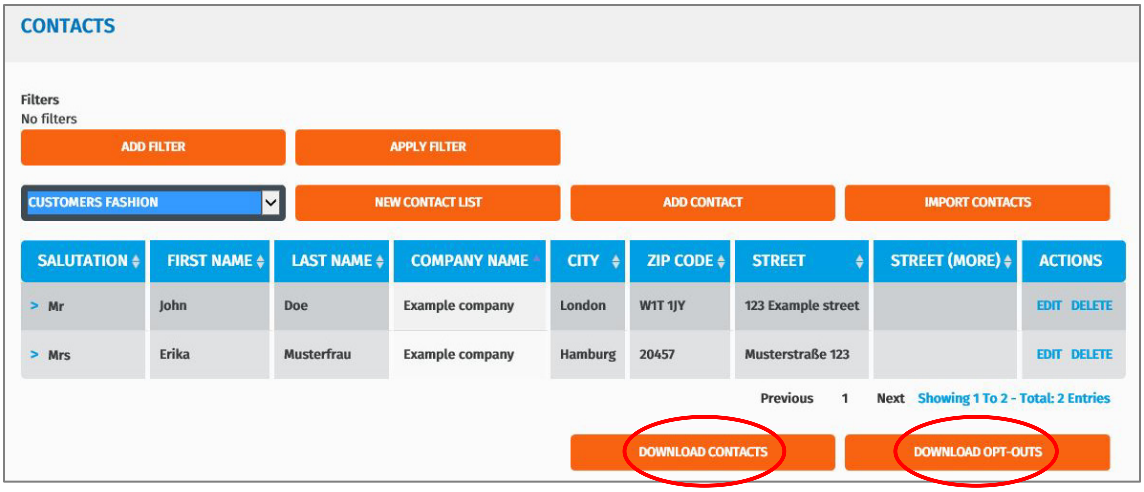
You can download all contacts, a contact list you have created or a list of Opt-outs (contacts that have unsubscribed).

Note
Contacts that have opted out remain in the contact list but are no longer included in further campaigns.

1. In the main menu, click on [CONTACTS].
2. Select the list you want to download.



3. Click on [DOWNLOAD CONTACTS] or [DOWNOAD OPT-OUTS].



4. Open or save the file.

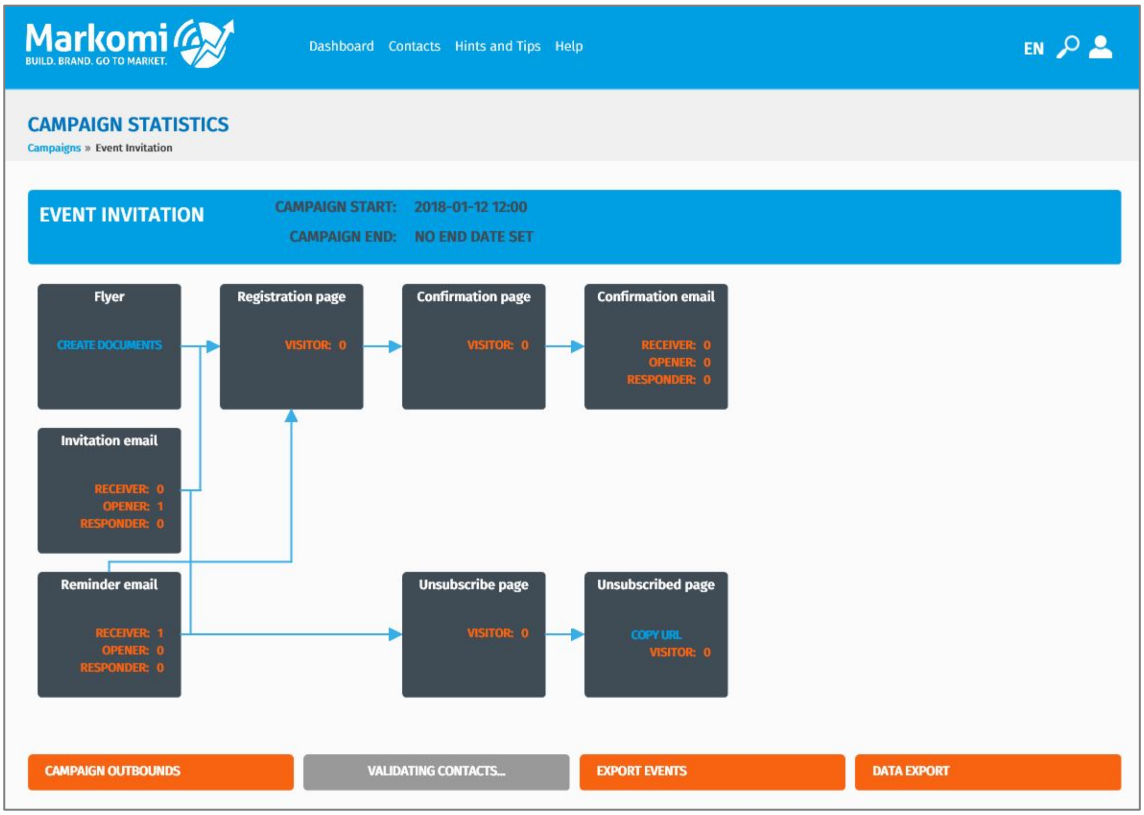
Managing campaigns

In the dashboard, click on the campaign you want to manage. Depending on the status of the campaign, you can perform different actions.

EDIT CAMPAIGN	Edit the elements within a campaign.
COPY CAMPAIGN	Duplicate a campaign that you want to repeat, saving you set-up time.
DELETE CAMPAIGN	Delete a campaign from your dashboard.
STOP CAMPAIGN	Stop a running campaign.
RESUME CAMPAIGN	Resume a stopped campaign. → The campaign will be resumed at the point where it was stopped.
CAMPAIGN STATISTICS	Show results from your campaign.
ARCHIVE	Move a campaign to the list of archived campaigns.
CLOSE	Close the box that displays these options.

Campaign statistics

After a campaign has been started, the campaign can be monitored. Here you can see how a campaign performs.



On the dashboard, click on the campaign and select [CAMPAIGN STATISTICS].

The workflow of your campaign is displayed. Each element contains the relevant statistics:

VISITOR	Number of people who have visited a page.
RECEIVER	Number of recipients of an e-mail.
OPENER	Number of recipients who opened the e-mail.
RESPONDER	Number of recipients who responded to the e-mail.

Depending on the campaign type, you can perform different actions:

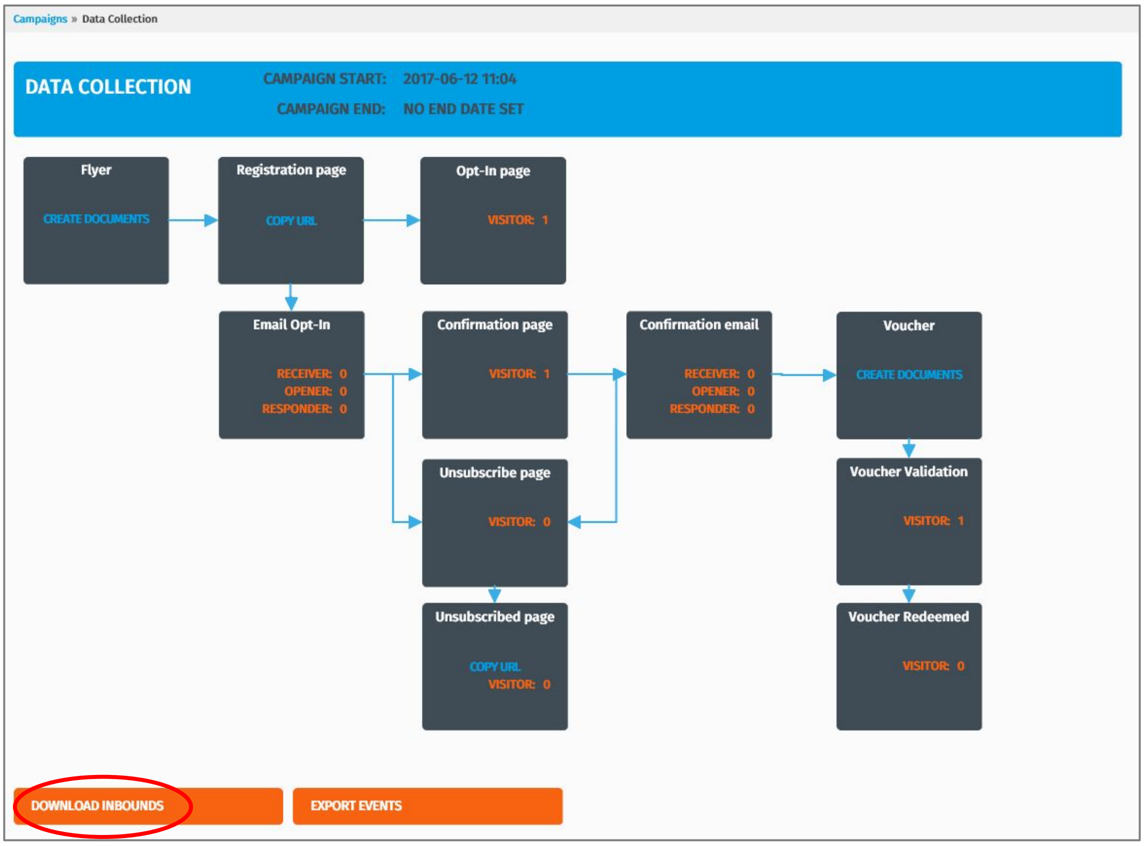
CAMPAIGN OUTBOUNDS	Download the outbound contacts of your campaign.
DOWNLOAD INBOUNDS	Purchase and download inbound records that responded to your campaign. → See “Purchase and download inbounds” on page 35.
VALIDATING CONTACTS…	Validate the e-mail addresses of your campaign’s outbound contacts before any e-mails are sent out. This can take several minutes.
EXPORT EVENTS	Download the results of your campaign.
DATA EXPORT	Download contacts and new generated data about your campaign.

Purchase and download inbounds

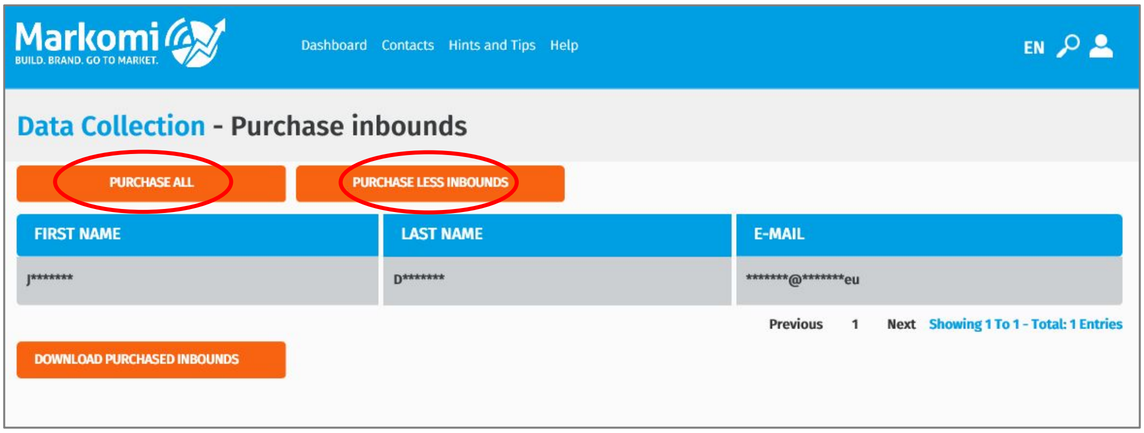
For inbound campaigns (e.g. data collection) you can download inbound records that responded to your campaign.

Note
Please be aware that the download of inbounds carries costs.

1. On the dashboard, click on your campaign and select [CAMPAIGN STATISTICS].
2. Click [DOWNLOAD INBOUNDS].

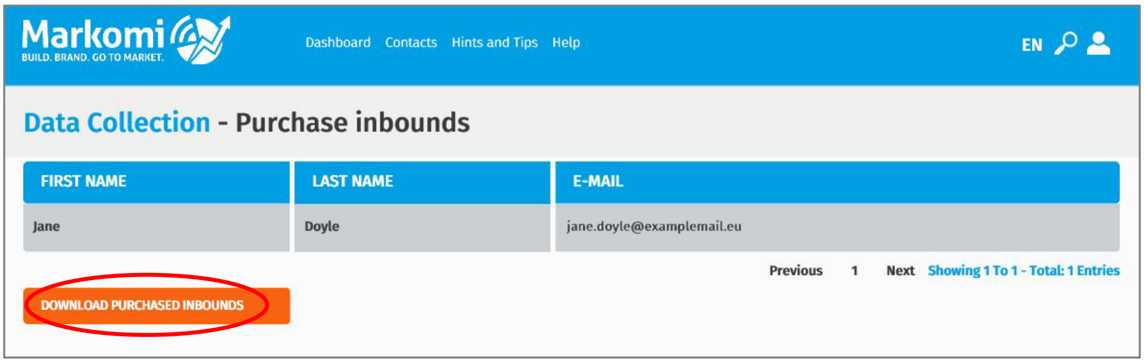


3. Click [PURCHASE ALL]
   or
   Click [PURCHASE LESS INBOUNDS] and type in the number of inbounds you wish to download.



4. Click [PURCHASE].

5. Confirm with [OK].
   The contact details are now visible.
6. Click [DOWNLOAD PURCHASED INBOUNDS].



7. Open or save the file.

Create and download documents

After the start of a campaign, the print elements (e.g. a flyer) can be downloaded and/or printed.

1. On the dashboard, click on the campaign and select [CAMPAIGN STATISTICS].
2. Click [CREATE DOCUMENTS] in the relevant box.

The document is created.

3. Click [OK].

4. Click [DOWNLOAD].

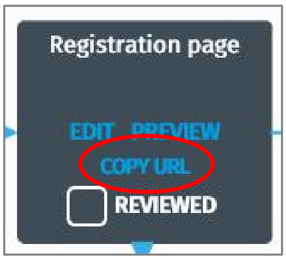
The document is now opened in your browser.

You can save it as a PDF file or print it using a printer connected to your computer. The PDF file can also be printed by any printing shop of your choice.

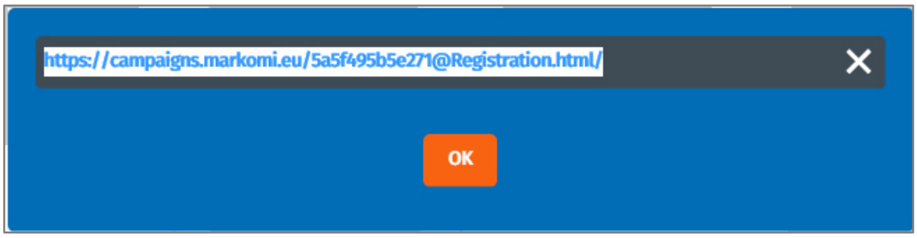
Copy URL

After starting a campaign, you can copy the URL (address of a website) of certain elements and post them on desired social media channels.

1. On the dashboard, click on the campaign and select [CAMPAIGN STATISTICS].
2. Click [COPY URL] in the relevant box.



3. Copy the URL (Ctrl+C or right mouse button/copy) and click [OK]



The URL is stored on the clipboard. You can now paste it in a social media post (Ctrl+V or right mouse button/paste).

Questions or problems?

If you need help, please check out the [Hints and Tips] in the main menu. There you will also find additional information on how to receive [Help].

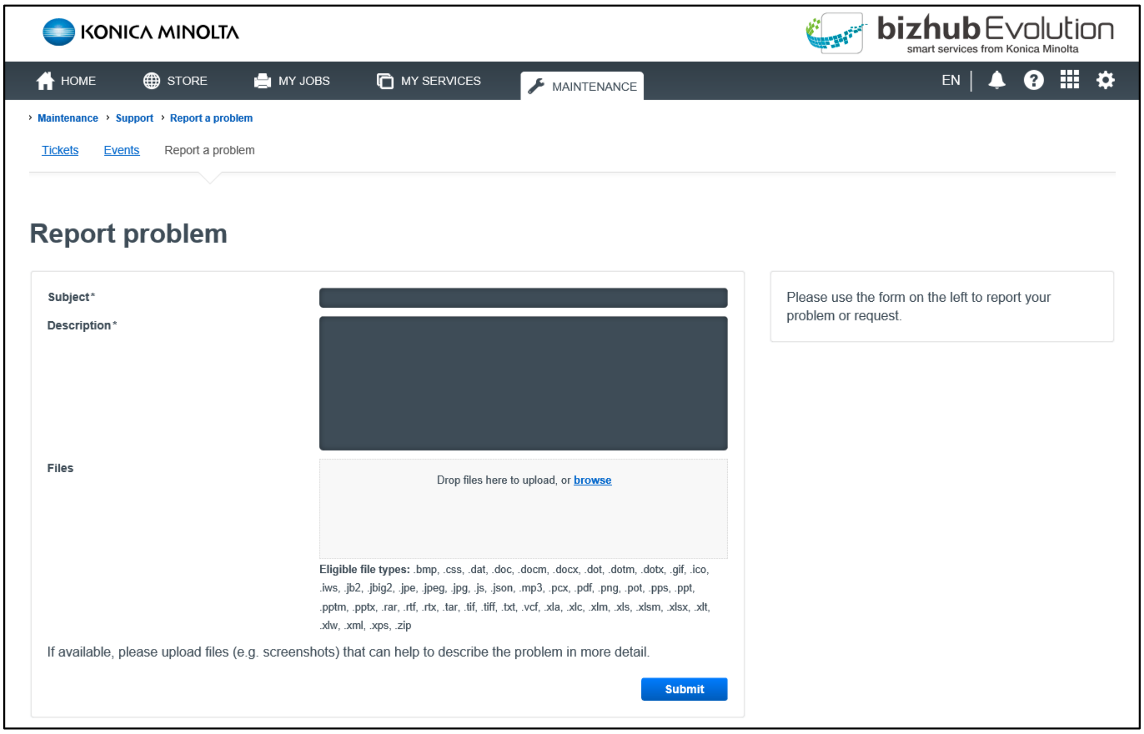
Report a problem

Please use the bizhub Evolution platform to report a problem.

Note
This function is only available to administrators. If you have no administrative rights, please contact your administrator to report the problem for you.

How to report a problem (as administrator):

1. Log in to bizhub Evolution at https://evolution.konicaminolta.eu/
2. Select *[Maintenance] → [Support] → [Report a problem].*



3. Enter the required information. Please describe your problem in as much detail as possible and provide any information that may help with fault analysis and troubleshooting (e.g. details of the browser and operating system used or screenshots).
4. Click on [Submit].
5. Confirm the prompt with [OK].
6. Confirm the message with [OK].
   The ticket for the reported problem is now displayed in the following area:

   Menu bar → [Maintenance] → [Support] → [Tickets].

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