

# First look at Conductor's new functionality

Version 4.6 Release December 2016

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Your guide to Conductor release functionality





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## Message from Chris Steffen

*Conductor Product Manager*

Iterative development. It's a defining feature of today's software development and it's behind our philosophy of innovation with Conductor.

### How does it work?

It starts with user feedback and our own observations about software performance. We use these inputs as the basis for developing system upgrades that we release to users in a periodic cycle.

### Moving mobile first

Most of the biggest changes you'll notice in the 4.6 release are that they are designed to move Conductor "mobile first."

This means we're making Conductor easier to work with and view on mobile devices. With version 4.6, you'll see how Conductor's responsive design is evolving it to become a more adaptable marketing technology partner — wherever and whenever you work.

### Our Big 3 improvements:

- 1. Responsive design**
- 2. Improvements in order workflow**
- 3. Improvements in campaign workflow.**

In response to client and internal input, the Conductor team is introducing a lot of helpful improvements in version 4.6. You'll find they make Conductor's workflow easier to view and understand. You and your users will save valuable time, too!

**Stay tuned for upcoming iterative releases.** They promise to make Conductor even more powerfully agile and responsive to your customers' marketing needs.

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# Responsive Design Improvements

## I. Mobile First functionality moves with you

Conductor 4.6 Responsive Design is centered on two key aspects of critical importance to today's users:

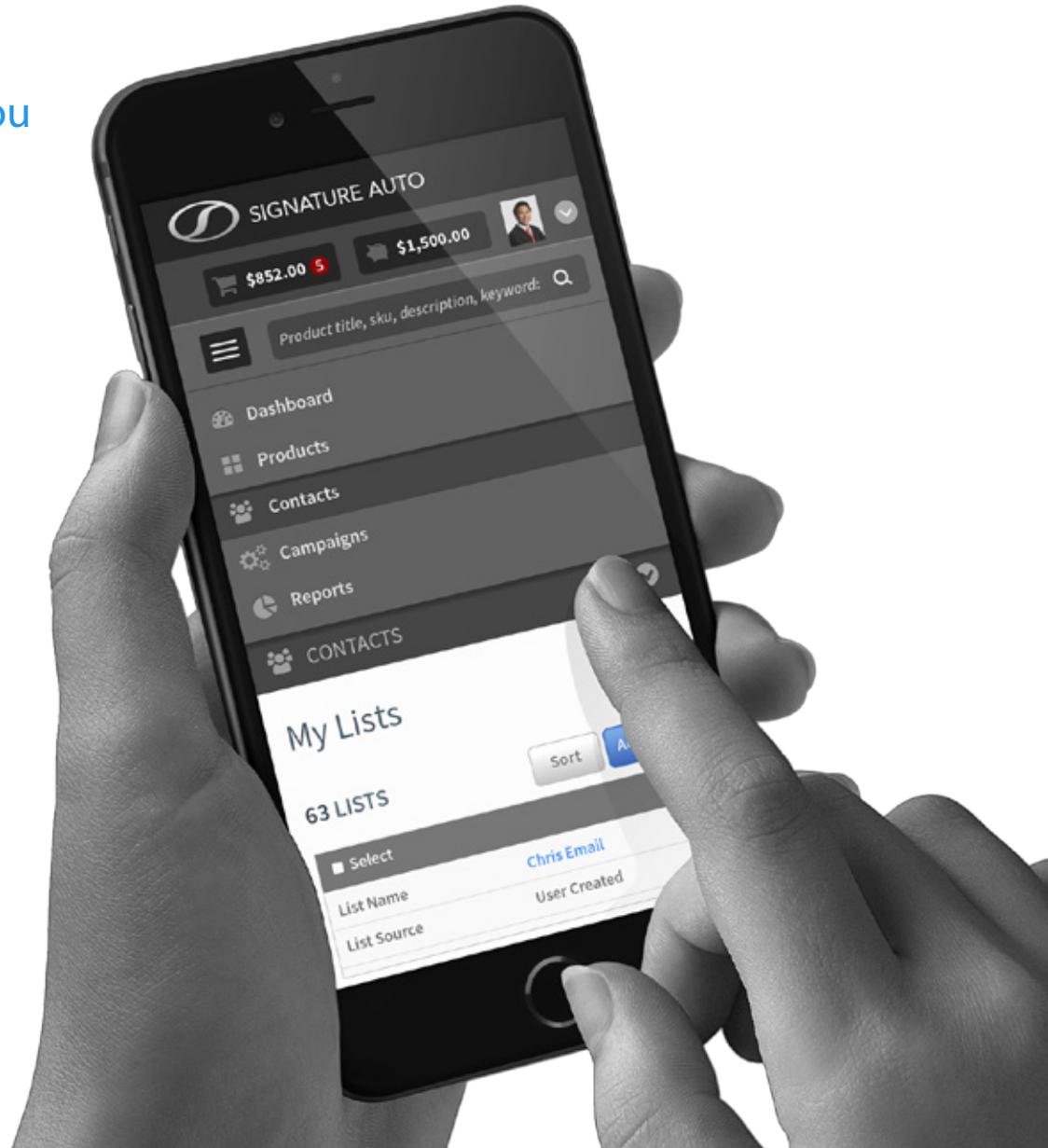
- 1) Mobile-friendly functionality and
- 2) A smooth and efficient user experience.

### **Better views. Faster loads. Smoother workflow.**

Whether on a smart phone, tablet or other mobile device, you and your users are now able to access and manage your Conductor workflow.

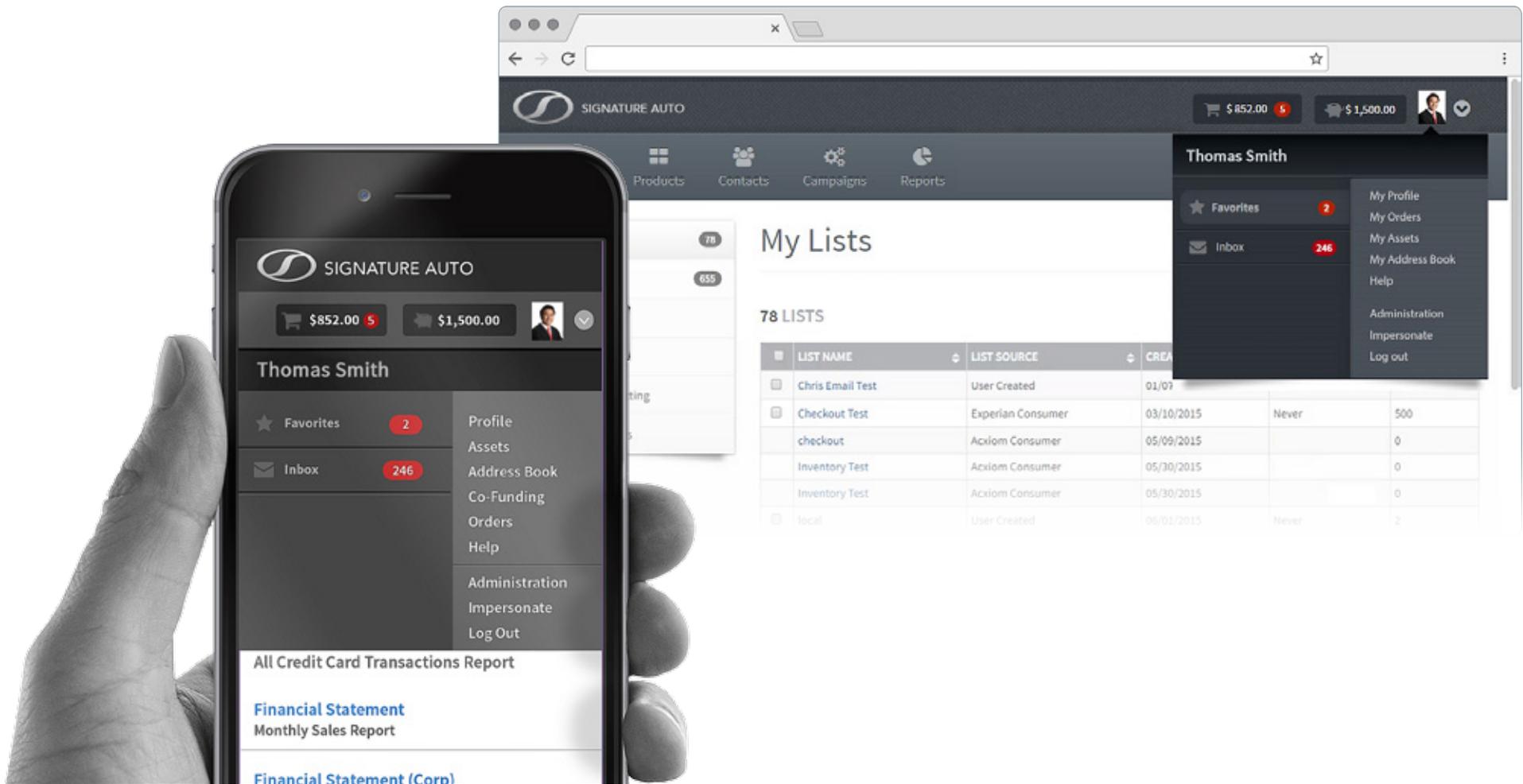
With version 4.6 and forward, the Conductor storefront (non-admin pages) is completely mobile-responsive!

New updates create screen views that automatically re-size for the user's device. You'll also find that pages and forms load faster and navigation is easier and more fluid.

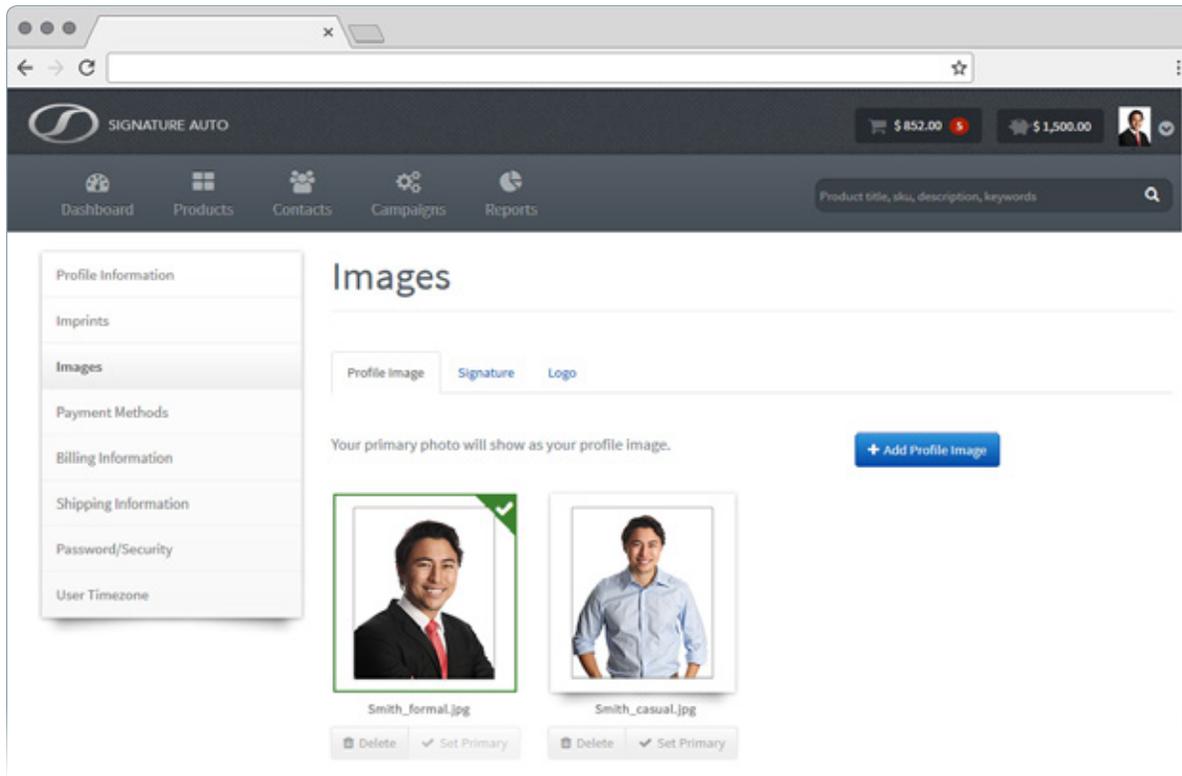


## Responsive design on all devices

**New Profile Menu:** Click under your Profile, and a new dropdown menu lets you directly access the Profile menu.



**Profile Images:** Also under the Profile Menu, users can now upload, store and delete Profile Images, Signatures and Logos from within a tabbed page layout. Multiple images can be kept on file and viewed with the opportunity to select a file image as Primary.



## II. Easier, more seamless user experience

### New drag and drop images

On the **Product Administration Page**, users will now be able to drag and drop images that they would like to use as **Preview Images on the Product Details Page**.

By default, images added via this drag and drop function save to the Assets/System/Images folder.

### Easier image editing

Now, users can scale images to fit and then rename the image. It's functionality that's an added enhancement to the recently added image editing feature.

More great news is that users can now edit images inline as they customize a product to order. The Edit Link next to the image in the Customization panel opens the Image Editor window.

### Return to User Summary button added

When an administrator is working in the User Administration panels, there used to be no way to navigate directly back to the User Summary. To resolve this issue, Conductor 4.6 adds a Return to User Summary feature to Administration page views. It allows a user to, for example, go back to User Summary from the Taxonomies page.

This addition provides an easy, quick link back to the User Summary page. It saves the user from having to navigate back through the task he or she is working through and prevents the need to search through navigation options on the left navigation bar.

# Improvements in order workflow

## Order process: Easier, faster and more intuitive

4.6 version improvements make the Conductor order process easier. Take a look below.

### Fewer steps in the order workflow

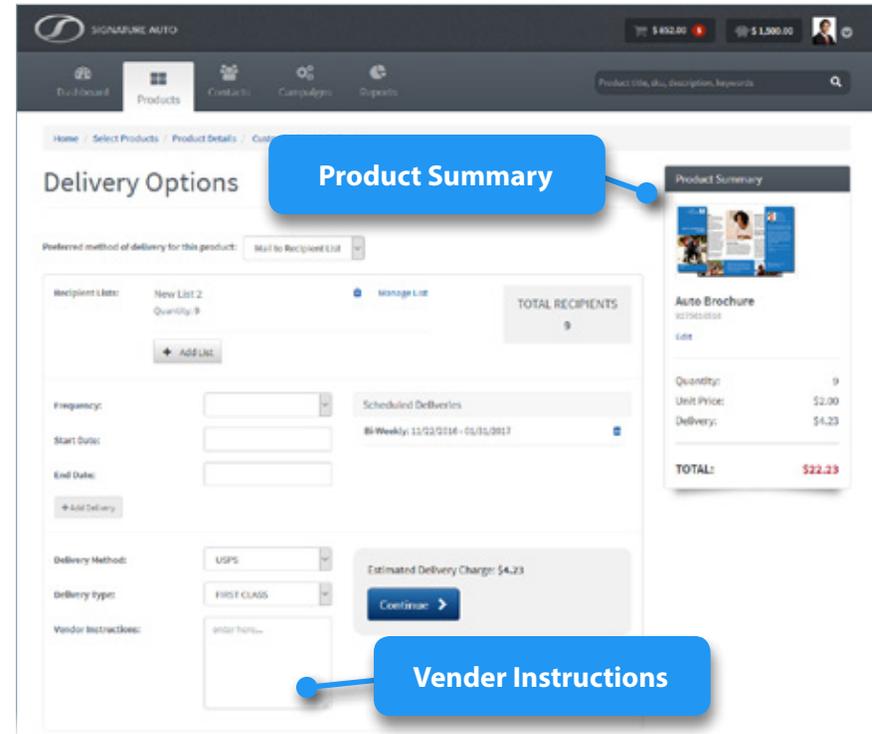
To streamline the customer's work process, we've consolidated steps in the order workflow. Users no longer have to click through multiple pages to select the delivery options, recipient lists, quantity, shipping address and delivery dates. Now, they can complete and view all of these details — all on one page.

### Product Summary is now visible at all times

Product Summary now appears in the right navigation panel throughout the order process. Users will be able to see their updated order information as they input information or make changes. Edits can be made to any previous step at any point in the process.

### Vendor Instructions now available in Delivery Options

We also added a field called Vendor Instructions to the Delivery Options page. This lets users direct instructions to the fulfillment vendor.



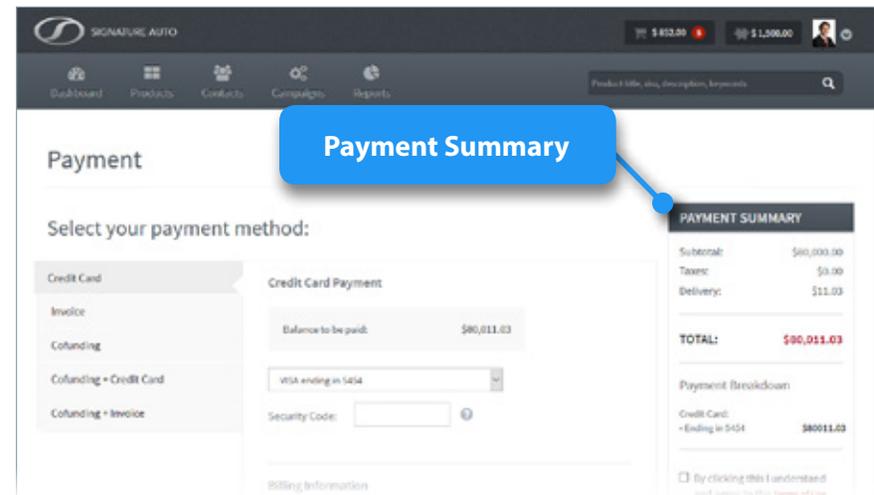
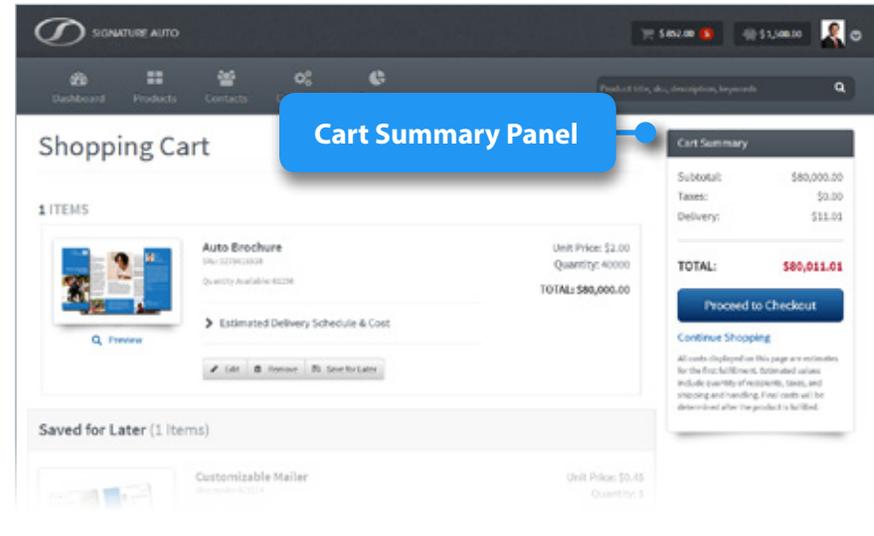
Users will be able to specify vendor instructions for print products when ordering delivery by mail or ship. The instructions will be visible on order details page as a read-only field.

### Streamlined Shopping Cart

Users can now enjoy a streamlined view of all products in Shopping Cart. Simply expand sections to view details such as estimated delivery schedule and cost. The Cart Summary panel displays the cart cost and initiates check out. The feature's more prominent positioning on the page helps it stay in view.

### Easier, more flexible Payments page

Users just select the payment method they wish to use, then complete the required information. The Payment Summary panel shows the order cost and payment breakdown and allows users to place the order. If multiple payment options are selected, the Payment Summary panel shows the order cost breakdown by payment method.



## Copy orders from Order History

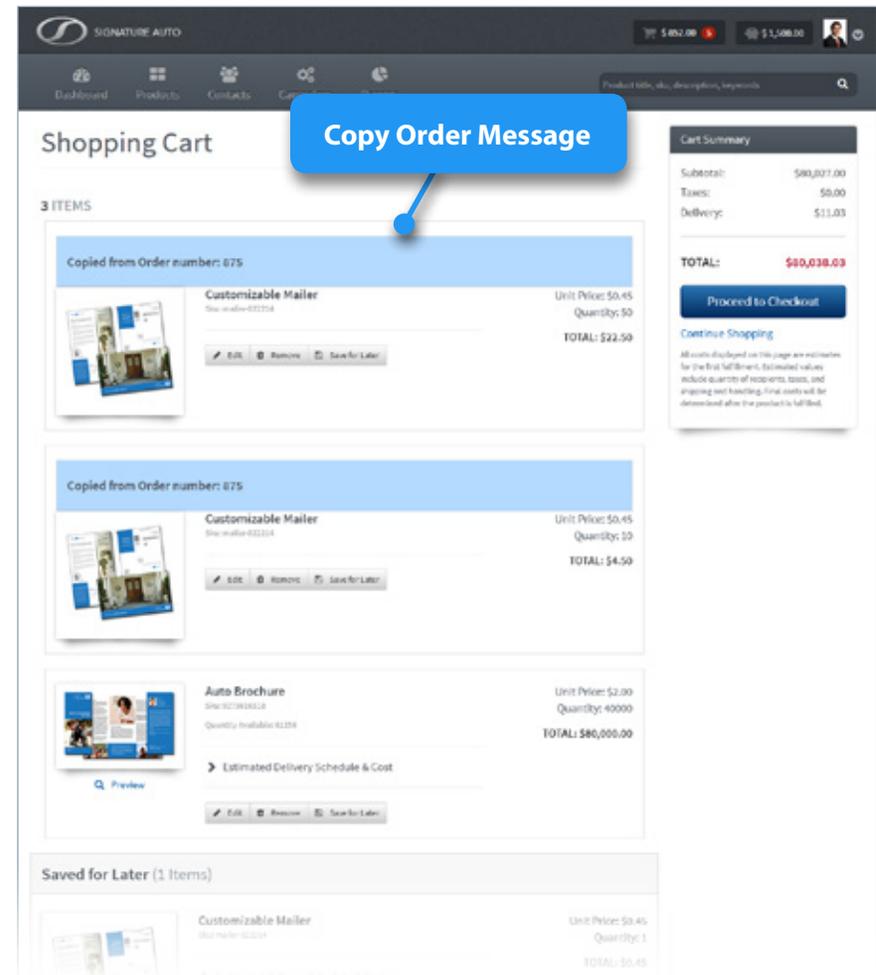
Now, users can more easily re-submit previous orders from Order History – we’ve reduced the number of steps. From Order History, the user just clicks Copy Order. The user will then be taken to Shopping Cart where the new order will appear.

A message will show which order the new order has been copied from. Users can make changes to the new order using the Edit link in Shopping Cart. This feature eliminates the need to navigate backwards to confirm the product and creates a more logical workflow.

## Order Approvals and Fulfillment Date Validations

Let’s say your client sends in an order for approval...but it wasn’t approved in time to meet the selected fulfillment date. Conductor will automatically modify the fulfillment date for the next available date. The new date will be determined by the system’s vendor production rules.

The user will then receive notification that their order has been approved. The record will be accessible in Order History. If the new date isn’t workable, the user will be able to cancel the order.



# Improvements in Campaign Workflow

## Easier to search. Simpler to build, customize and deliver.

Together, the following improvements help users maintain consistency among the products in their campaign while helping them to more quickly complete their marketing campaign tasks.

### Unified campaign workflow

Conductor will walk users through the order workflow for each product in the campaign. Users customize and define delivery for their first product, then move on to each successive product in the campaign. Conductor even keeps a running count of the number of products selected. It's now quicker and easier to:

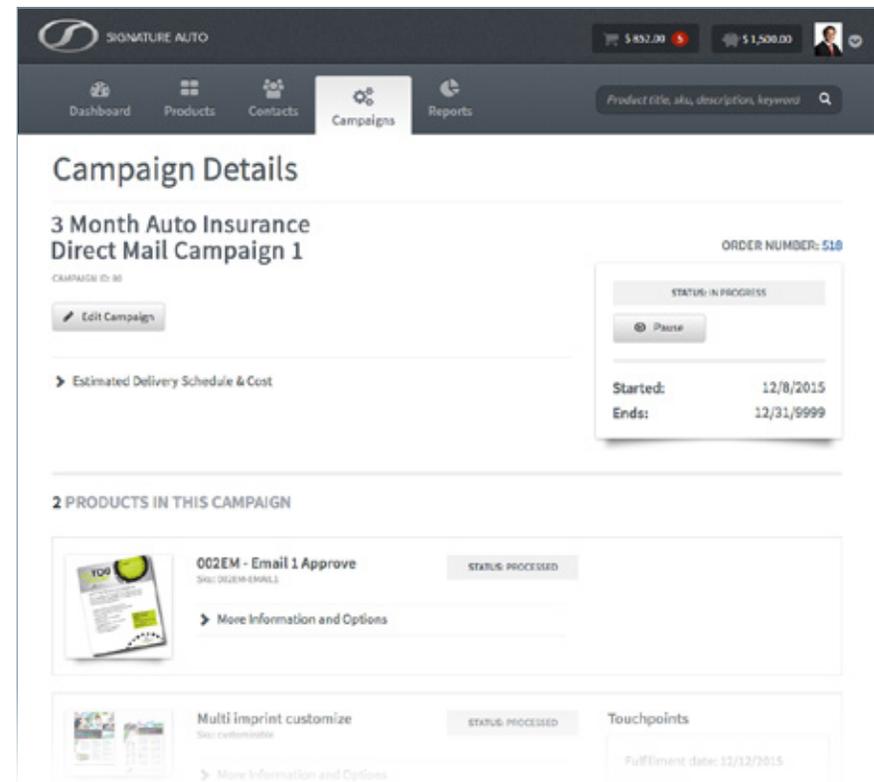
- Create new campaigns
- Enroll in corporate campaigns
- Filter and sort campaigns
- View campaign data such as active date range and status
- Customize products and delivery options for individual products in a campaign

### Easier to track progress while working

When users have a product up on the screen, they will be able to see the campaign name and thumbnails of ALL products in the campaign, along with the name of the individual product they are viewing.

## View, review and edit on Campaign Summary Page

Similar to the upgrades we made to the Shopping Cart and Order Details, Conductor's Campaign Summary provides a streamlined view of all products in the campaign. Users can also view a consolidated estimated delivery cost. The Estimated Delivery Schedule & Cost table offers an at-a-glance view of campaign delivery dates.



# Other Improvements

## Users no longer need to specify a contact list for a download product

Previously, products tagged as Contact List Variable required the user to specify a contact list – even though Conductor does not merge contact list data into download products. This is just one example where a reported pain point was resolved for the convenience of Conductor users.

## Time limit on Recurring Frequency

Recurring frequency is when a user wants to automatically repeat an order at specific intervals. Conductor now assigns a limit to how far in the future these recurring deliveries can be repeated.

This limit is enforced when a user orders a product or campaign on the Delivery Options page. The system sets the following limits by frequency of the delivery:

**Daily – max of 6 months**

**Weekly – max of 1 year**

**Bi-weekly – max of 1 year**

**Quarterly – max of 2 years**

**Semi-Annually – max of 2 years**

**Annually – max of 2 years**

The user will select the order frequency needed as part of the order workflow.

## Faster loading reports

Conductor will no longer initiate a search until the user clicks the Search button. Previously, the system would make multiple calls to bring back data while the user entered their search data. With the new change, Conductor will make only one call to bring back data that matches all search criteria entered.

This change reduces the time needed to load a report. It also helps users more easily manage accounts upon which large numbers of products and orders are generated.

## Conductor is now email “agnostic”

Email processing is now handled by an enterprise service that resides outside of Conductor. The new process will transfer email data to the enterprise email service when the order is placed. The enterprise email service will then transfer the email data to the email vender service for execution on the fulfillment date.

## Simplified shipping order notification

We’ve removed redundant system message templates for order notifications. A single order notification template now consolidates previous templates for Order Notification with Shipping, Order Notification with Mailing and Order Notification with Shipping and Mailing.

### **Bulk User Upload now available via Excel or CSV**

An Upload User List button now appears on the Users Tab view of the Admin/Users page.

Now, Excel (.xlsx or .csv) can be used to upload a listing of new users. Names, email addresses and roles can be defined for new users.

Conductor will validate required fields on upload. It will also provide a summary of the successful record upload. A link to records that encountered errors and were not uploaded will be made available so that they can be corrected.

### **Fulfillment record now created when orders are placed**

Now, when a user places an order, Conductor will create a fulfillment record.

The Shopping Cart and Order Details Page will display all future fulfillments of all product types – print and electronic (email, SMS) – in the Estimated Delivery Schedule & Cost table. Previously, the fulfillment records were created at the time the fulfillment needed to be sent to the vendor as defined by their production rules.

### **Confirmation message sent on deleted or cancelled orders**

Now, when a user deletes or cancels an order from Order History, system messaging sends a confirmation message. This message is in addition to the cancel order confirmation screen seen in previous versions of Conductor. In the past, a confirmation notice was only sent with orders that were cancelled or deleted as part of an account deletion or reactivation.

### **Fulfillment validation emails contain the updated delivery date**

Conductor team now allows the user to receive an updated delivery date after their order is approved. This applies to situations where the original date requested by the user was invalid.

# What's coming up in Conductor?

## Building campaigns will be easier with Campaign Designer

A new Campaign Designer tool is in the works that will make the campaign workflow more in keeping with your users' marketing planning process.

Users will select their target contact list first...and then select products and delivery options. Once the campaign has been designed, the user will be directed to the Campaign Summary page (new in Conductor 4.6) where their list data source and campaign send options will be displayed.

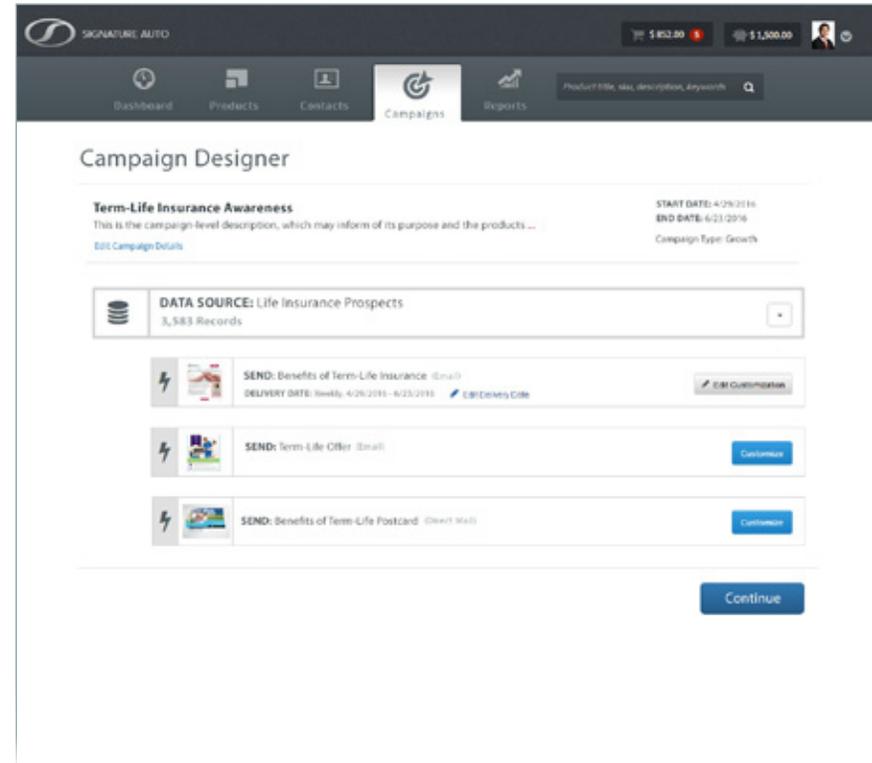
## Save as Draft

While navigating through the product order workflow, Conductor will allow users to save their work in progress. They'll be able to name their draft and view a listing of their current drafts.

When the user decides to edit a draft, they will be taken back into the product order workflow where they left off and can continue work on their order.

Behind the scenes, we're making lots of small changes that will add up to big improvements in daily user experience later this year – all while keeping ongoing customer workflow up and running smoothly.

**Stay tuned for future updates. Or ask a Conductor team member, for more details!**



# Did you know?

Conductor's News Feed widget on the Dashboard can be either an RSS feed or can be used for administrator created messages. Keep your users in the know with industry or company news!

Have you discovered a Conductor tip or shortcut you think could benefit Conductor customers? Tell us about it! If selected, we'll share it in a future issue.

## Friends helping friends

Got a question about Conductor? The Conductor product team is always happy to get you connected with solutions and answers. You can also contact Conductor Product Manager, Chris Steffen at [cfsteffen@whateverittakes.com](mailto:cfsteffen@whateverittakes.com) or call 309-684-6051.

Thanks for your support of our continuing work on Conductor.

